

June Hot Topics

Substitute Office, Human Resources
& Payroll

Employee Verification

It is important to verify the employee campus list on SmartFind Express at the beginning of the school year.

- Create an employee list report. Verify that classification and times are accurate. The profiles must reflect “Track 1” unless 240 day employee.
- Make sure all employees registered with SmartFind Express.

Priority List

Utilize the priority list option in SmartFind to benefit your campus.

- The substitutes on the list will have access to your campus assignments first.



Secretary Backup

- Please make sure that you have assigned a backup, in case you are out. This person should know how to utilize the sub system.
- Let us know who your backup is and we will give them administrative rights.



Activity Codes

Each campus is assigned activity codes to use in Smart Find associated with campus funds to pay substitutes.

- If you do not know your activity codes, see your “Dashboard” in Lawson; Substitutes/SmartFind Reports; “Activity Reason List”.
- If you need an activity code assigned, email the entire budget code including activity code to djgarza@pasadenaisd.org or imartinez@pasadenaisd.org. We will set it up in Lawson and add the activity code to SmartFind. Ensure the fund will allow you to pay substitutes.
- HR activity codes are not for your use.
- If you enter an incorrect activity code we will change it to your campus default code. If it hits your budget and you need to do a journal entree, you will need to contact the accounting department.

Job Verifications

You must check your jobs on a daily basis.

- Verify assignment times and assigned substitute are correct.
- If a holiday, verify that your employees did not create a job.
- Retirees on long term assignments will not have jobs in SmartFind. Make sure you are having them fill out a time card and you are entering their approved retired rate in Lawson.
- Vacancy must be created on a “Track 1” calendar.
- All long term assignments will need to be requested thru Manager Self Service under temporary worker.

Requisition (PA42.1)

pa42

Effective Date – Date opening requisition

Status – NEW

Dates – “requested”, “opened”, & “needed” should all be the same as effective date

Openings – 1

FTE – “1” if full time, “.5” if half time

Position – Open position #
ex. 122317219923
(SPED aide MR/Success
@ McMasters)

+

Add

Change

–

Delete

◀

Previous

?

Inquire

▶

Next

Inquire

▼

Related F

Company

863

PASADENA IND. SCHOOL DISTRICT

Requisition

Effective

Status

Structure

Replace

Approval

Posting

Status

Dates

Requested

Opened

Needed

Closed

Openings

Filled

Remaining

Headcount

FTE

Position

Process Level

Department

Job Code

Click: **Fill Defaults**



Click on **Replace** tab

Requested – Person filling out PA42

Budgeted – Always “Y”

Replacement – “Y” replacing someone

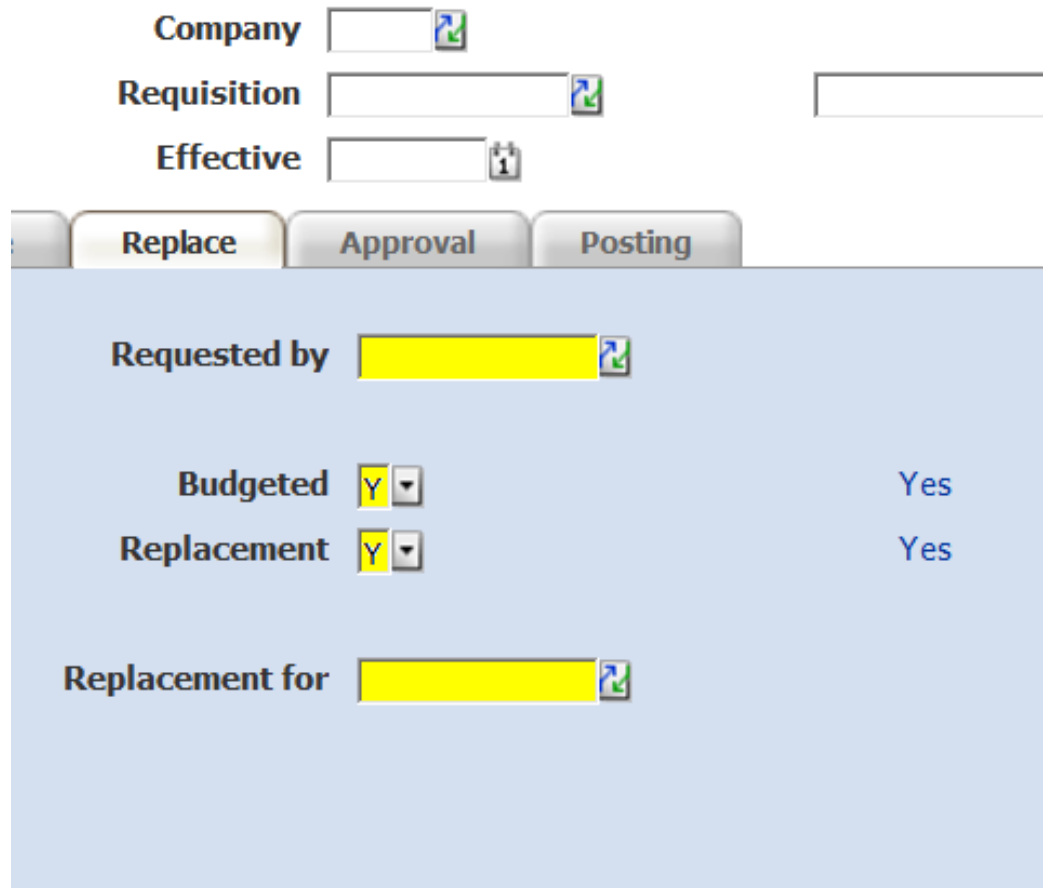
Replacement – “N” new position

Replacement for – Employee # being replaced

Once all fields are completed:

Click **Add**

An email will be sent to HR to post on PISD website & E-Recruiting



Requisition Offers (PA45.1)

Requisition – Choose PA42 being filled from drop down

Type – External

Applicant – Choose from drop down

Date – Date offer is extended

Start – Date applicant is anticipated to start

FTE – “1” for full time, “.5” for half time

Click **Add**

 Add	 Change	 Delete	 Previous	 Inquire	 Next	 Inquire
---------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------

Company

PASADENA IND. SCHOOL

Requisition

Type

Applicant

Offer Type E

Date

Status PE

– Offer Data

Start

FTE

Employee – Employee #

Action, Nbr – Select JOB CHG SS or TERM1-MSS

Effective – Effective date of change

Click **Inquire**

Reason = Use drop down

Select AA-RECLASS, TERM-RT, TERM-OE, etc.

Click **Fill Defaults**

All necessary fields will be filled in.

Click **Add**

Navigation: + Add | Change | - Delete | Previous | ? Inquire | Next | Inquire

Company: 863 PASADENA IND. SCHOOL DISTRICT

Employee:

Action, Nbr: JOB CHG SS 1 Job Change (Manager)

Effective: 08/01/2013

Reasons: AA-RECLASS

Parameters	Selected Items 1	Selected Items 2	Selected Items 3
Data Item	Current Value	Change To	
FTE	1.000000		
Position	126103119924	126103219911	
User Amount	20120815.0000		
Process Level	126		
Supervisor	126		
Schedule	TEACHER		
Work Schedule	4075		
Expense Account			
Expense Acct Unit	11.126.024.000	11.126.011.000	
Expense Dist Co	199		
Expense Subaccount			
Grade	T07		

Fill Defaults

Requesting Stipends & Temporary Workers

PISD Bookmarks

- Inventory ↕
- Ext Yr Hires by Location
- Ext Yr Apps by Position
- Ext Yr Apps by Location
- PISD Dashboard
- NT User ID Lookup
- Campus Responsibilities ↕

Campus Responsibilities

- Parent Menu ↕
- Employee Groups Contact ↕
- Manager Tasks ↕

Manager Tasks

- Parent Menu ↕
- Responsibility Audit
- Missing Responsibilities
- Request For Supplements
- Request for Temp Worker
- Responsibility List

Request for Employee Supplements Form

Use Below List to Select Employee.

	LAST NAME	FIRST NAME	DESCRIPTION	
Select	BELTRAN	CECILIA	Gen Sec Human Resources	CB
Select	BURTON	MARLU	Certification Officer	MB
Select	CONDE	VONNIE	Benefits Specialist	VC
Select	CORONADO	MARTHA	Gen Sec Human Resources	MC
Select	DENNIS	JERRY	Assoc Supt for Human Resources	JDe
Select	FLORES	LINDA	Coordinator Human Resources	LF1
Select	GAMBOA	MARIA	Coordinator Human Resources	YG
Select	GARZA	DEBORAH	Gen Sec Human Resources	DJC
Select	GARZA	MARIBEL	Gen Sec Human Resources	Ma
Select	GARCABALLA	MICHAEL	Gen Sec Human Resources	Ma

Use Below List to Select Supplement.

Supplements List	
Select	D100 - Doctorate Degree
Select	P561 - Instruct Mate St Elem/Mid/ Int

Review your selections and submit.

Selected Employee ID:

Selected Employee First Name:

Selected Employee Last Name:

Selected Employee Email:

Selected Employee Position:

Assigned Supplement:

Submission Date:

Submitted by Employee ID

Location

Add or Remove Supplement

Comments (optional)

Temporary Workers

Select from Candidates list generated based on
Job type selected or enter existing Employee ID
and press Select button

Job Type:

AVID Tutors ▼

Select

Start Date:

[Open Calendar](#)

Retiree ☐

Comments:

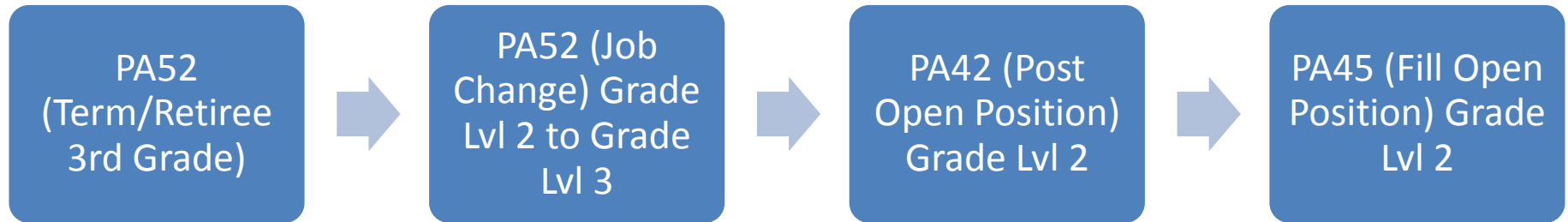
Verify

Selected Job Type: AVID Tutors

New Hires, Terms, Temp Workers & Job Changes

- PA52 is used when you are doing a job change or termination within your location. If you have done a PA42 and posted a position, you will then need to do a PA45 to hire someone on that requisition. You should do all your moves within before doing a PA42, because once it's been posted you'll have to do a PA45 to put someone in that position. Which means if someone from your location decides they want to move into that position, they'll have to apply to it and then you'll do the PA45 to hire them for your opening. Seems a little confusing, but that's how this system is intended to work.
- Before doing the PA52 for a term, please fax over the employee's resignation letter and exit interview. Please remember, you don't automatically have budget to do the PA42, just because you've done the PA52. Depending on the time you do the PA52, it might not get updated until the next day, and if we are closed for payroll, it won't go through for a few days.
- Before calling someone in to work temporary for you, please make sure that they are a current employee. If a temporary hasn't been paid in over a year, we automatically terminate them. So PLEASE verify this with Human Resources.

Filling Positions Internal/External



- Make ALL internal moves on PA52 (one move per employee) before posting any remaining open positions through PA42
 - Ex. In a loop schedule do not move a 3rd Grade teacher to 4th Grade if that teacher will be moving to Kinder – only move 3rd to Kinder then either fill the 4th from within (PA52) or post on PA42 if no internal staff will take position
- Use PA45 to fill all outstanding PA42 offers

On/Off Duty Schedule

- Found on the HR website: www.pasadenaisd.org, Human Resources, Documents, On/Off Duty Schedule

Human Resources

Salary Schedule

SmartFindExpress

Documents

District Public Notice of Highly Qualified Teachers

Pasadena ISD Wellness Center









Contact Us




☐ Search All District Websites

HR DOCUMENTS

Categories

-  Appraisal Procedures and Timeline (1)
-  Benefits (8)
-  Certification Officers (1)
-  HR Forms (10)
-  Job Descriptions
-  On/Off Duty Schedule (2)
-  Recruitment (4)
-  Salary Schedules (12)
-  Substitute Office (9)
-  Support Appraisals (2)
-  Volunteers and Observers (1)
-  List All (593)


















 [On-Off Duty Schedule 2012-2013.pdf](#)

 [On-Off Duty Schedule 2013-2014.pdf](#)

Validation of Salary Letters

- Pull the Salary Letters Check-Off List
- Once all employees have initialed that they've verified their letter send a copy to Brenda in

HR

- ^  Payroll/Benefits Reports
 -  Additional Pay and Overtime Report 
 -  Cornerstone Club - Deduction Participants
 -  Employee Overtime For 730
 -  Employee Overtime Percent Of Salary
 -  Employee Salary Letters Check-Off List
 -  Employee Salary Letters For 730
 -  Employee Stipends For 730
 -  ESS Benefit Enrollment Status
 -  Pay Code Totals
 -  Payroll Distribution by Account
 -  Payroll Distribution by Employee
 -  Payroll Time Records Report by Accounting Organization (Org. or Resp.) or Batch
 -  Substitute Pay Rates
 -  Timesheets 

FMLA, TDL & Military Leave

- Employees on FMLA or Military Leave must have an absence keyed in for each day they are out.
- Employees that have been placed on TDL are essentially terminated from Lawson and will not require absences once all paid leave and/or FMLA has been exhausted.

FMLA and Temporary Disability Leave

- ❖ Any employee absent over 5 consecutive days for personal illness or illness in household must apply for FMLA through the Benefits office.
- ❖ Once they are approved all absences will be coded as FMLA in Lawson and/or SmartFind.
- ❖ If absences have already processed payroll should be contacted to post the used FMLA hours.
- ❖ The LP51 notification e-mail sends the status of the approval or denial of FMLA.

The following records have been added to LP51 in the last 24 hours:

NOTIFICATION TYPE: NEW

EMPLOYEE:

LAST NAME:

FIRST NAME:

LOCATION: 854

PLAN: LV-FMLA-P

REQUESTED ON: 04/15/2013

BEGINS ON: 05/20/2013

ENDS ON: NONE

INTERMITTENT: NO

STATUS: FMLA-APPRV

EXPECTED BACK: 06/07/2013

RETURN TO WORK: NONE

CREATED BY: CBeltr

CREATED ON: 05/21/2013

UPDATED ON: 05/21/2013

ADD/UPDATE BY: CBeltran

If you see **FMLA – NA** on the status line, the employee did not receive approval or allocation of FMLA hours.

If an employee is **NOT** approved for FMLA:

- ❖ If the employee is instructional they should be directed to Benefits to apply for Temporary Disability Leave. If this is approved the employee should be set up on a Leave status through Human Resources as of their last day of paid leave.
- ❖ If the employee is not instructional they must return to work no later than their 10th day absent without paid leave or they must be terminated.

The following records have been added to LP51 in the last 24 hours:

NOTIFICATION TYPE: RTN DT

EMPLOYEE:

LAST NAME:

FIRST NAME:

LOCATION: 854

PLAN: LV-FMLA-P

REQUESTED ON: 05/28/2013

BEGINS ON: 05/24/2013

ENDS ON: NONE

INTERMITTENT: NO

STATUS: FMLA-NA-1

EXPECTED BACK: 06/10/2013

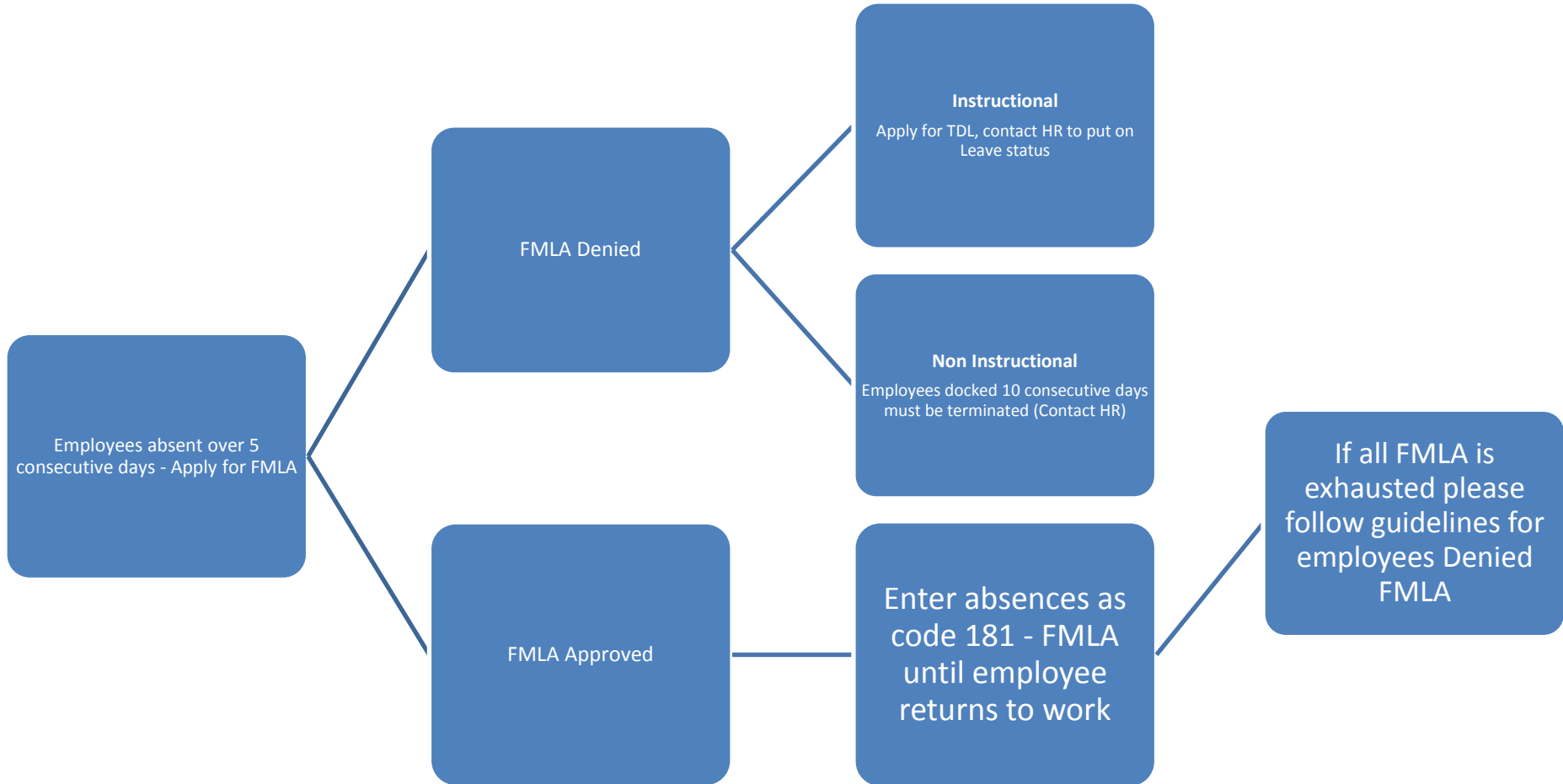
RETURN TO WORK: NONE

CREATED BY: CBeltr

CREATED ON: 06/04/2013

UPDATED ON: 06/04/2013

ADD/UPDATE BY: CBeltran



Worker's Compensation (WC)

- From Policy: The first seven calendar days (5 work days) of an employee's absence from work because of an injury sustained on the job shall be drawn from the employee's accumulated paid leave benefits and/or earned vacation.
- Please code the first 5 absences to personal illness (101). On the 6th absence, begin coding the absences as Worker's Comp (191). Payroll will make necessary offsets depending on what the employee has selected with the Safety office.
- WC incidents are submitted to Benefits for FMLA approval or denial. Regardless of the FMLA status on the LP51 notification WC absences, after the first 5 days, are coded as 191.

New Hires, Job Changes and Terminations

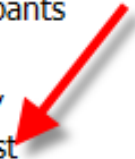
Please continue to send HR and Payroll an e-mail of terminations. The sooner we know about the termination we can begin processing the last paycheck correctly. Our objective is to not over-pay an employee.

Dashboard Reports

- ❖ Employee Directory, Birthday List, Address Verification
- ❖ **Non-Rolling Leave Balances**, Perfect Attendance
- ❖ Pay Code Totals, Payroll Distribution by Account/Employee
- ❖ **Time Records Report by Accounting Organization (Org. or Resp.)**
- ❖ **Salary Letters**
 - ❖ Salary letters for your location are available on your dashboard. However, we **encourage the employee** to review and/or print their salary letter from **ESS**. All employees that have a **job change or add/remove stipends** should re-print their salary letter.

- ❏ Employee Absentee Report By Location (New Batch)
- ❏ Employee Leave Of Absence
- ❏ Leave Report For 730
- ❏ Leave Summary With Running Balance
- ❏ **Non-Rolling Leave Plan Balances** ⓘ
- ❏ Perfect Attendance
- ❏ Sick Leave Bank Members
- ❏ Sick Leave Bank Non-Members
- ^ 📁 Payroll/Benefits Reports
 - ❏ Additional Pay and Overtime Report ⓘ
 - ❏ Cornerstone Club - Deduction Participants
 - ❏ Employee Overtime For 730
 - ❏ Employee Overtime Percent Of Salary
 - ❏ **Employee Salary Letters Check-Off List**
 - ❏ Employee Salary Letters For 730
 - ❏ Employee Stipends For 730
 - ❏ ESS Benefit Enrollment Status
 - ❏ Pay Code Totals
 - ❏ Payroll Distribution by Account
 - ❏ Payroll Distribution by Employee
 - ❏ **Payroll Time Records Report by Accounting Organization (Org. or Resp.) or Batch**
 - ❏ Substitute Pay Rates
 - ❏ Timesheets ⓘ
- ^ 📁 Reports
 - ❏ Contract Acknowledgement Letter

Salary
Letter
Check List



ESS (Employee Self Service)

The employee has direct access to many of their personal documents as well as the ability to update their address, tax withholding and banking information.

- ❖ **Address Changes**
- ❖ **Printing Check Stubs/W-2's**
- ❖ **Changing Direct Deposit Info**
- ❖ **Changing W-4 status/exemptions**
- ❖ ****Salary Letters****

The Payroll BOPM includes many “step-by-step” tutorials for Employee Self Service options.

Employee Self Service

PISDLAWSON

Did you know....??

A tutorial is available on the district website under the Payroll Department: [Payroll BOPM](#)

You can add or remove banks for your direct deposit?

You can check your leave balance and history of absences?

You can View and Print your pay check stubs from ESS?

You can see your pay rate history.

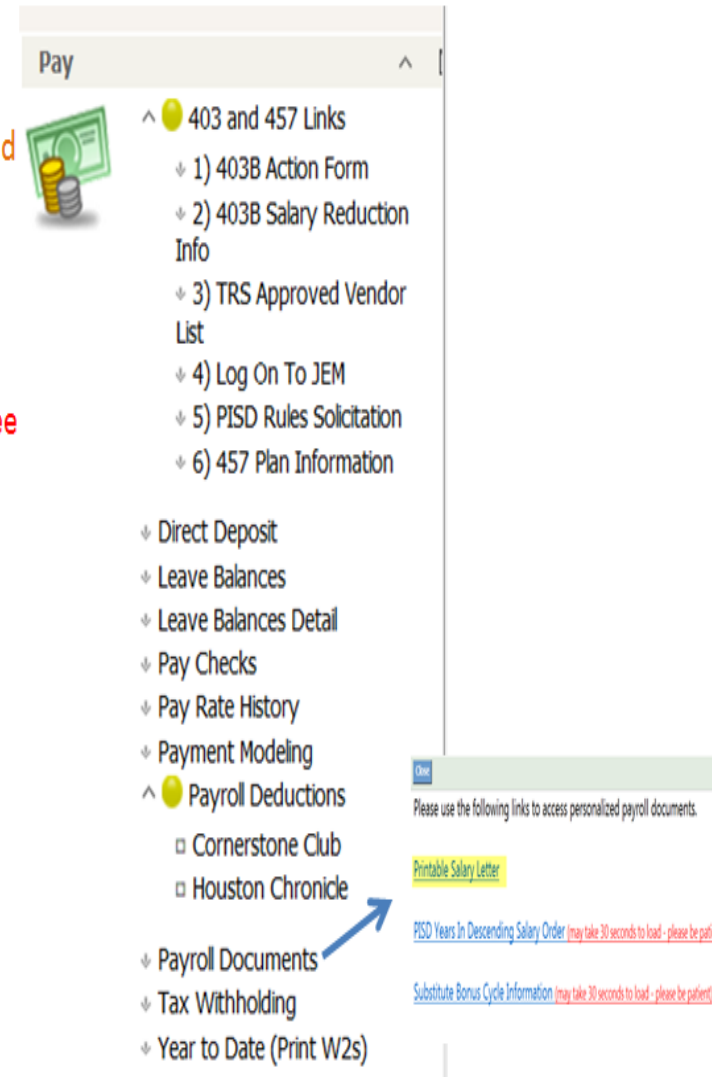
You can use Payment Modeling to see what your paycheck would look like with a different tax filing status or number of allowances?

You can view your Salary Letter or your PISD salary history (Best Three or Five years - see Payroll Documents)?

Set up your Houston Chronicle subscription?

Change your W-4 filing status?

View and Print a Previous Year W-2 form?



Payroll Audits

When an audit is requested you should include the following items:

- Timekeeper Payroll Check off Sheet
- Time Records Report
- SmartFind Reports (for the Pay Period requested)
- Non-exempt time cards and Exempt sign in sheets or Raptor reports. These auditable records are the legal requirements of Fair Labor Standards Act (FLSA) issued by the Department of Labor
- All sign in sheets for one-time pay records – extended day, curriculum writing, in-home training, UIL judges, etc.
- A list of exempt personnel that did not sign in with the supervisor's and/or administrator's confirmation that they were present
- Any additional payroll documentation used to enter and review the time records

Each campus or department will be audited at least one time each school year. If there are discrepancies found during the audit your Payroll Specialist may request additional audits until all inconsistencies are resolved.

Upload Spreadsheet

- ❖ The Upload Spreadsheet is available on the Payroll BOPM. This is a tool designed to assist you with the time record entry. You can use the spreadsheet for one-time pay codes and absences.
- ❖ For example: extended day programs, extended year programs, custodial absences.
- ❖ Please send the upload to payroll one to two days before the cut-off date and time.
- ❖ You need to have plenty of time to review your time records in order to make any necessary corrections.

Time Cards

- The Time Card Training for Non-Exempt guide is on the Payroll BOPM. Please review this training with your staff. Your audit results will determine whether or not your location requires individual time card training by our staff.
- The non-exempt time card is the legal document. Our district will follow the FLSA, Department of Labor and district Policy in all wage and compensation matters.

SmartFind

The SmartFind reports are used to verify and correct as necessary in order to upload accurate time records. Time Cards, SmartFind & Lawson entries must match.

- Use the daily reports to verify absences and substitute pay
- The pay period report is an auditable payroll record.

Time Keeper Check Off List

The check off list was created to assist your payroll process. In our recent payroll audits, we have discovered that some locations are not using the check off list correctly.

Common concerns:

- ❖ Not completing the check off list: no signatures, not indication that the items had been reviewed
- ❖ Forgetting to submit the Variable Aide time cards to appropriate department in a timely manner, **therefore we added this to the check off list.**
- ❖ Indicating report has been reviewed but the audits reflect issues that have not been resolved. **This has been found during the regular payroll process on our end.**

The time card and Lawson entries must match. Your report, if run by Accounting Organization, will reflect all PS33 entries, SmartFind uploads, and the Upload Spreadsheet

TIMEKEEPER CHECK OFF LIST		
Timekeeper's Signature:		
Supervisor's Signature:		
Period Begin Date:		4/29/2013
Period End Date:		5/12/2013
Entry Cutoff Date:		5/21/2013 11:00am
Pay Date:		5/31/2013
Batch #:		12XXX
Cycle:		20
Payroll Task	Completed	Task Description and Comments
Non-Exempt Timecards		Time cards for non-exempt employees completed & signed by employee AND supervisor (All time should be entered on one time card for all Non-exempt employees, with the exception of Paraprofessional Coaches)
Temp Time Cards		Input time for all 'Temp Time Cards' for any Retirees not on SEMS, ASCD approved aides, Variable aides for Special Education, etc.
SEMS reports		SEMS reports are verified and printed for the pay period
Sign In Sheets		Verify that all exempt employees have signed in each day or that an absence has been entered for each day not signed in (RAPTOR or any other form of sign in sheet is acceptable)
Time Records Report (Must be reviewed and corrected before cut off)		After payroll entry is completed run 'Payroll Time Records Report by Accounting Organization (this includes all entries for your location including SEMS) or Batch' from Dashboard, print, and verify
		Check report for 'More than 5 consecutive absences' (Verify that FMLA paperwork has been filled out if necessary)
		Verify all time has been entered and pay rates/employee numbers are correct
		Check for duplicate entries and delete if necessary
		Check for entries that exceed the pay period ending date, delete if necessary to re-enter next payroll
		Verify all Exempt absences are entered in full or half day increments (the exceptions are Staff Development and Official Business)
		All other errors have been reviewed and corrected as needed.

Employee Forms

Campus Personnel are not authorized to sign the following forms:

- Any and all **TRS** and **FMLA** forms (submit directly to the Benefits office)
- **Annuity** plan forms **403b** and **457** (the employee should refer to the Payroll BOPM for specific requirements)

UPCOMING TOPICS: Detailed Dashboard Reports, New Timekeeper Training, Refresher Timekeeper Training

We want to hear from you. Please send your Hot Topic ideas to your payroll specialist.

Remember: For answers to your payroll questions, if you can't find it on the **Payroll BOPM**, then you probably can't do it. Just kidding, please contact your payroll specialist we are here to support our employees.