

## Best Practices in Payroll Streamlining the Hiring Process

BY: LAURA NANCE  
ST CLAIR COUNTY BOARD OF EDUCATION  
SEPTEMBER 17, 2018

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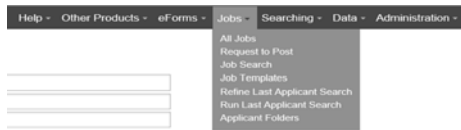
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## Routing the Request to Post in Teach in Alabama

The request for Hire is completed by the Principal/Supervisor in Teach in Alabama



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## Principal Enters Information Needed by HR/Payroll

Examples of information entered by Principal/Supervisor:

- Number of positions requested
- Type of position requested
- If position is a new position
- Who the position is replacing (if applicable)
- Start date of position
- Contract length
- Hours per day
- Additional Information they need in the posting request

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### Example of a Job Posting Request

|   |  |                            |
|---|--|----------------------------|
| *Position Type  |  |                            |
| Certified - Position - Elementary Education   |  |                            |
| *Is this a new position?  |  |                            |
| No  |  | # Jobs                     |
|   |  | 2                          |
| *If no, person to be replaced   |  |                            |
| Kristen Fuller (resigned)   |  |                            |
| *Funding Source   |  |                            |
| - Foundation  |  | *If Other, please specify: |
|   |  |                            |
| Reports To  |  |                            |
| Principal   |  |                            |
| *Job Type   |  |                            |
| Certified   |  | *Hours Per Day             |
|   |  | 8                          |
|   |  | *Contract                  |
|   |  | 9                          |
| *Start Date   |  |                            |
| 8/1/2018  |  | *Temp End Date             |
|   |  | Contract Days              |
|   |  | 187                        |
| *Job Attachment   |  |                            |
| Salary Range  |  |                            |
| \$38,342 - \$64,522   |  |                            |
| GL Number   |  |                            |
| 11-S-1100-010-0030-1110-0-1200-0000   |  |                            |
| Additional Job Information  |  |                            |
| Applicants must hold or be eligible for an Alabama teaching certificate endorsed in Early Childhood/Elementary Education. |  |                            |

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### Posting Request

Posting is then routed to next approver

In St. Clair County, the next approver is the Chief School Finance Officer.

- The CSFO will determine if the position is in the budget.
- If the position is included in the budget, the CSFO will enter the position number and G/L number

The next approver in the process is the HR department

- HR enters the salary range
- HR enters the internal number for the posting.
- HR posts the position

- Schools can have the fields and routing customized to their procedures

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### Request to Hire

Once the interviews have been completed and the principal is ready to hire, they make the request to hire through Teach in Alabama.

This has streamlined our process. The principals can no longer send to HR a request to hire for someone that did not apply for that position. It also helps to speed up the process since the entire process is done through electronic means. We receive the request instantly. We do not have to be at our desks to approve and route the request. Anywhere we are connected to the internet, we are able to process a request to hire.

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## Request to Hire

Can customize the form to include information needed to enter into Nextgen. This makes it easier to add new personnel. Can have all required information on one screen. You do not have to print the entire employment application to get required information.

This works well if have 2 monitors. You can have information pulled up on 1 screen and enter information in Nextgen on the other screen.

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## Request to Hire Example

|                          |                              |                       |        |
|--------------------------|------------------------------|-----------------------|--------|
| Document Status          |                              |                       |        |
| Job Request/Order Number | Job Title                    | Subject/Grade         |        |
| 200847000                | Classroom                    |                       |        |
| Building/Department      | Company Code                 | # of Jobs             |        |
| 00000100                 | 00000100                     | 1                     |        |
| Reports to Principal     |                              |                       |        |
| Is this a new position?  | If no, person to be replaced |                       |        |
| No                       | [Redacted]                   |                       |        |
| Employee ID              | SSN                          | Date of Birth         | Gender |
| 1234                     | [Redacted]                   | [Redacted]            | Female |
| Race                     | Are you Hispanic or Latino?  |                       |        |
| White                    | No                           |                       |        |
| Last Name                | First Name                   | Middle Name           |        |
| [Redacted]               | [Redacted]                   | [Redacted]            |        |
| Street Address           | City                         | State                 | Zip    |
| [Redacted]               | [Redacted]                   | Indiana               | 47446  |
| Primary Phone            | Cell Phone                   | Email                 |        |
| [Redacted]               | [Redacted]                   | [Redacted]@school.com |        |
| Employee Type            | Job Type                     | Hours Per Day         | Days   |
| Regular Job Type         | Classified                   | 8                     | 10     |
| Work Schedule            | 7:30-3:30                    |                       |        |

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## Request to Hire

Request to Hire is then routed to next approver

In St. Clair County, the next approver is the Chief School Finance Officer.

- The CSFO will enter the payroll pull date
  - This will be the first day of the month that the employee will receive their first check
- CSFO will verify and correct, if needed, the effective date

The next approver in the process is the HR department

- HR will verify that all documents are attached (social security card, drivers license, etc.)
- HR will verify that scores are entered for applicants.
- HR will verify that proper certification exists for the job that was posted
- Schools can have the fields and routing customized to their procedures

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## Board Approval

Once all documentation is verified in the Request to Hire, the applicant is entered on the board agenda for approval.

In St. Clair County, the applicants information is entered in Nextgen in Position Control. Once entered in Position, the applicant will show on the board agenda.

It is not required to have Position Control to use the routing in Teach in Alabama

Once the Board approves the hire, the applicant is "hired" in Teach in Alabama

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## On-Boarding

•Once Board has approved the applicant for hiring, the on-boarding process begins.

•The on-boarding process can be initiated through Teach in Alabama if you have the Records program.

•The applicant will receive all employment documents through this program.

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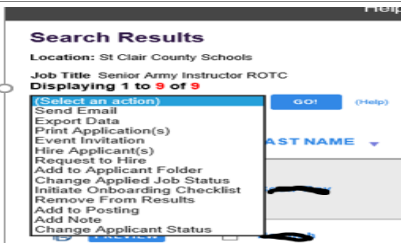
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## On-Boarding Checklist



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## Electronic Checklists for New Hires

Examples of Checklists a school could use:

- Certified Personnel Checklist for new hires
- Support Personnel Checklist for new hires
- Sub Personnel Checklist for new hires
- Exit Checklist
- Beginning of the Year Checklist for all employees
  - Technology Agreements
  - Employee Handbooks
  - Mandatory Reporting Requirements
  - Update emergency contact information

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## Why Onboarding is Important

**Starting Them Off On the Right Foot:**

All employees experience some type of onboarding, although the formality and comprehensiveness of onboarding programs varies widely across school systems. By formally defining your own onboarding processes, you will be better able to successfully integrate your new employees into your school system.

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## Example of Video that New Hires Watch



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## Other benefits of using electronic on-boarding of new hires

- Consistent Information
- A built-in acknowledgement system helps maintain compliance by requiring electronic signatures on employee handbook documents and allows you to easily see which employees have read the handbook and those who need to be reminded
- As soon as the documents are signed, they automatically save and store in your employee's personnel file
- Documents can be routed to all parties that require approval, or review

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## St. Clair County Checklists




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## Certified Checklist

2017-2018 Certified

|    |                         |      |                          |
|----|-------------------------|------|--------------------------|
| 01 | Welcome Message *       | ICM1 | <input type="checkbox"/> |
| 02 | Test Security *         | ICM1 | <input type="checkbox"/> |
| 03 | Direct Deposit *        | ICM1 | <input type="checkbox"/> |
| 04 | Equipment Request *     | ICM1 | <input type="checkbox"/> |
| 05 | Letter of Contingency * | ICM1 | <input type="checkbox"/> |
| 06 | 403b Eligibility *      | ICM1 | <input type="checkbox"/> |
| 07 | WI-4 *                  | ICM1 | <input type="checkbox"/> |
| 08 | A-4 *                   | ICM1 | <input type="checkbox"/> |

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## Examples as to what you can include in the new hire checklist?

### Required new hire forms

- W-4
- A-4
- Direct Deposit Enrollment Form
- Sick Leave Enrollment Form
- 403 Eligibility
- Health Care Notification
- Test Security Form
- I-9

### Informational Documents/Videos

- Health Insurance (PEEHIP)
- Retirement System
- Leave Information
- Pay Policies
- Wage and Hours Rules
- Experience Information
- Welcome Information

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## Can Set up Custom Workflow

| Type     | Name  | Steps | Items to Generate |
|----------|---|-------|-------------------|
| Document | Employee Signature                              | 1     | 4216              |
| Document | Payroll Approve + Benefits Approve + HR Approve | 3     | 0                 |
| Document | HR Approve + Payroll Review + Benefits Review   | 3     | 3                 |
| Document | Employee Sign + Super Approve + HR Approve      | 3     | 2                 |
| Document | HR Approve + Payroll Review                     | 2     | 4                 |
| Document | LS996   | 1     | 170               |
| Document | HR Supporting Document                          | 1     | 140               |
| Document | Employee Signature + Payroll Approval           | 2     | 1039              |

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## Groups

Can set up groups to allow for multiple people to approve in workflow

We have 3 employees in the Tech Department that can approve signed technology agreements



| NAME              | DESCRIPTION  | MEMBER COUNT |
|-------------------|--|--------------|
| Human Resources   | HR Admin   | 4            |
| Payroll           | Payroll Admin  | 4            |
| IT                | IT Admin   | 3            |
| Payroll - Posting | Approval for all posting and recommendations for new hires | 2            |

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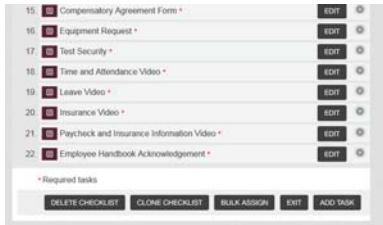
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## Assign a Checklist to New Hires




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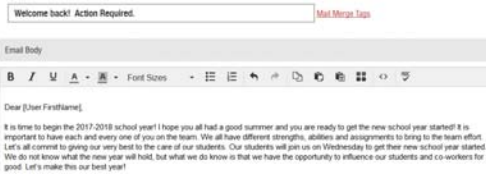
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## Notification




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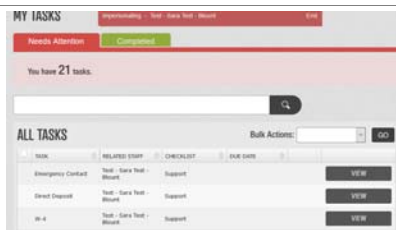
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## New Employee Tasks




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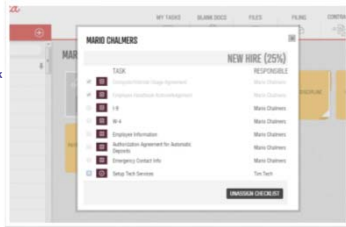
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### Status of Assigned Checklist

Look at Employees to determine what paperwork is outstanding.




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### Report of Checklist Status

| <input type="checkbox"/> | First      | Last   | Location         | Assigne  | Employee Handb                      | Completeness                        | Emergency Conts                     | Status   |
|--------------------------|------------|--------|------------------|----------|-------------------------------------|-------------------------------------|-------------------------------------|----------|
| <input type="checkbox"/> | Tara       | Tester | ASHVILLE HIGH    | 04/07/20 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |          |
| <input type="checkbox"/> | Melinda    | Splawn | ST. CLAIR COU... | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | CHRISTO... | HILL   | SPRINGVILLE E... | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | ROBERT     | CISCO  | MOODY ELEME...   | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | SHANE      | PARKER | ODENVILLE MI...  | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | DONNA      | GLOVER | MOODY MIDDLE     | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | PAUL       | LACKEY | SPRINGVILLE ...  | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |

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### E-mail Reminders

|                          |            |         |                 |          |                                     |                                     |                                     |          |
|--------------------------|------------|---------|-----------------|----------|-------------------------------------|-------------------------------------|-------------------------------------|----------|
| <input type="checkbox"/> | MURDERI... | LADLEY  | MOODY ELEME...  | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | SHANE      | PARKER  | ODENVILLE MI... | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | DONNA      | GLOVER  | MOODY MIDDLE    | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | PAUL       | LACKEY  | SPRINGVILLE ... | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | LANA       | CLAYTON | RAGLAND HIGH    | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | CHRISTO... | WALTERS | MOODY HIGH      | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |
| <input type="checkbox"/> | JOEL       | CAUSEY  | SPRINGVILLE     | 08/09/20 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Complete |

10 items per page      1 / 65      1 - 10 of 649 items

Bulk Actions:  GO

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## Electronic Personnel Folders

1. Standard Folders are Created:

### Examples of Personnel Folder

- 1. Personnel Folder
- 2. Payroll Folder
- 3. Certification Folder
- 4. Emergency Contact Folder
- 5. Contract Folder
- 6. Discipline Folder

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## Personnel Folder

Determines security to employee records based on the Folder

For example:

- Payroll folder can only be accessed by employee and payroll
- Emergency Folder can be accessed by Supervisor, Employee, Payroll, and Personnel.
- Discipline Folder can only be accessed by Employee and Personnel

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## Conclusion

•Streamlining your hiring process is a way to save time and money for your organization.

•Employees now expect to use electronic documents as a way to complete paperwork.

•If the hiring process is done correctly, it could save your organization a lot of "headache" in the future.

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Contact Information

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