Personnel Reporting - LEAPS

Russell Raney, CSFO
Cullman City Schools
Payroll/Personnel Certificate Program
September 2018

LEAPS
How does it affect funding?

- Two main sources of data determine funding through the Foundation Program
  - ADM (Average Daily Membership) – 20 days after Labor Day
  - LEAPS/SLEAPS Report
    - Personnel report with experience, degree and salary information
- If either of these data sources are inaccurate, then you could cost your system $1,000s in potential funding
- Due Dates
  - Main File – October 12, 2018
  - Monthly Filing

LEAPS – Then and Now

- The "Little Red School House" – Prior to STI involvement
  - CD Program/Manual Entry
- INOW Phase 1 – Merging accounting data and scheduling data
  - Numerous Errors to fix
  - Frustrating……but accurate
- INOW Phase 2 – No merging of accounting data with scheduling data
  - Easier……..but might not be as accurate as before

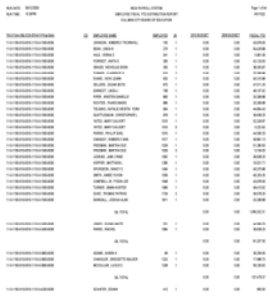
Preliminary Work

- Payroll Coding
  - Certified employees to certified object codes (001-099)
    - Several different object codes
  - Support personnel to support object codes (100-199)
  - Fund Source – State, Federal or Local?
    - Fiscal Stabilization Funds & Jobs Bill
- While object codes generally stay the same from year to year, fund sources can change yearly
- Harris LEAPS Services
- Nextgen reports can be used to check coding

Regular Teacher	010
Resource Teacher	011
Alternative School Teacher	012
First Year Teacher Scholar	013
Teacher – Gifted	014
Teacher – Collab Spec Educ.	015
Teacher – Collaborative Other	016
Teacher – Retired	018
Teacher – Vacancy	019

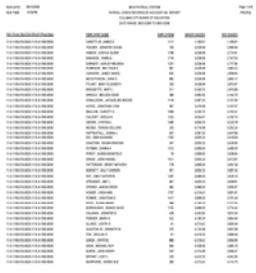
YTD Distribution Report

- The YTD Distribution Report is very useful for checking the G/L coding of your employees
- Payroll
  - Miscellaneous Procedures
    - Misc P/R Reports
      - YTD Distribution Report
- This report should be run for the current fiscal year.
  - I would recommend running it for only active employees



Payroll Check Records By G/L Account

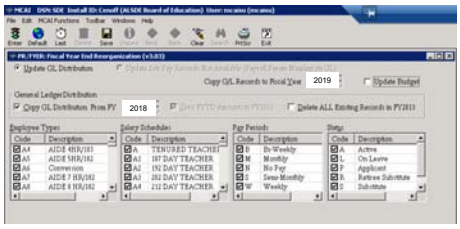
- This is another report that will help with checking your payroll coding
- Payroll
  - Misc Payroll Procedures
    - Misc Payroll Reports
      - P/R Chk Rec by G/L
- This report can be run based on a date range
- You can also specify a specific G/L component when running



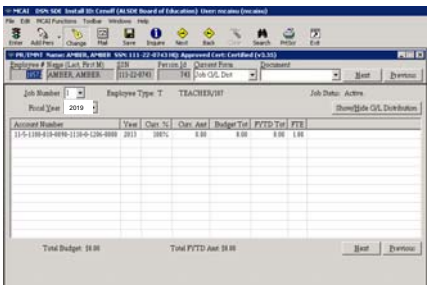
Setting up FY 2019 G/L Records

- The first thing that needs to be done to start the LEAPS process is setting up/verifying the FY 2018 G/L records in payroll
  - This is accomplished through the Fiscal Year End Reorganization procedure
    - This procedure is located in payroll under the Fiscal Year End menu
  - You can change FY 2019 G/L codes without interfering with FY 2018 live payroll records
    - G/L codes and distribution percentages
    - Coaching Supplements – FTE

Fiscal Y/E Reorganization

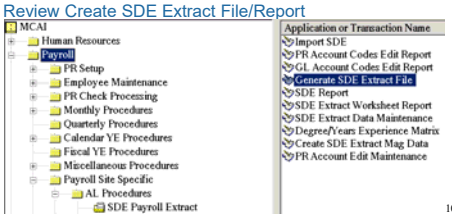


G/L Distribution Screen



The LEAPS Process

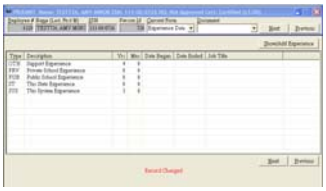
- Update Experience and Tenure Code
- Generate your SDE Work File
- Review SDE Report
- Review SDE Worksheet Report
- Do any Maintenance to your SDE Work File
- Review Create SDE Extract File/Report



10

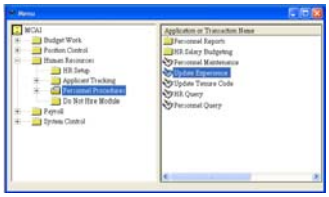
Increasing Experience Data

- **NOTE: This does not increase Salary Schedule Steps or salaries on an employee. This menu item is used for updating "This System" and "Other Support" Experience types for LEAPS purposes.**



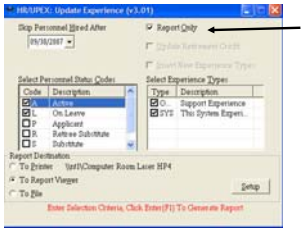
Increasing Experience Data

- Go to Human Resources Folder
  - Personnel Procedures
    - Update Experience



Increasing Experience Data -Reviewing Data Only

- The "**Skip Personnel Hired After**" date is the cutoff for updating experience data. This date varies between sites. Be aware that any employee's who were hired after this date, will not receive an experience increase. The hire date that will be used will be the ORIGINAL HIRE DATE found on the Personnel Data screen of employee maintenance.
- Select the "**Personnel Status Codes**" you want to increase experience. The transaction will look at the Person Status on the Personnel Data screen of employee maintenance.

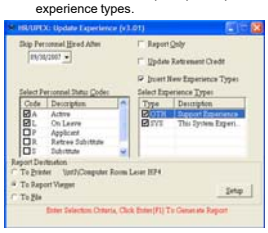


By selecting "Report Only", you will receive a crystal report with selected employees for you to review. **IT WILL NOT INCREASE EXPERIENCE**. Other options will be grayed out.

Press Enter (F1) to produce a report. This report shows all employees who currently have experience data on their Experience Data screen in employee maintenance.

Increasing Experience Data

- Select the cutoff date and the status codes to update. Deselect the "**Report Only**" selection. This will open up the options for retirement credit and inserting new experience types.



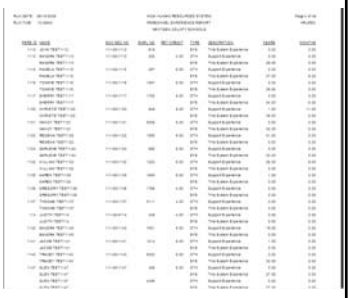
Select the "**Insert New Experience Types**" to update those employees who do not have any experience currently on their experience screen.

Both the "**OTH**" and "**SYS**" types should be selected under experience types. The "Other Experience" is for experience earned by a non-certified employee and the "This System Experience" is for those employees who are certified and are earning experience. All other experience types are irrelevant for LEAPS reporting and can be kept up manually on the employee maintenance screen.

Press enter (F1) and the system will begin updating/inserting experience records. Depending on the size of your school system, this may take a few minutes.

Increasing Experience Data -Report

- Once the system is through updating and inserting, it will produce a report. This report will show all employees and their UPDATED experience.
- **Note: All employees will show on the report. However, only those that were hired before the cutoff date have had their experience increased**

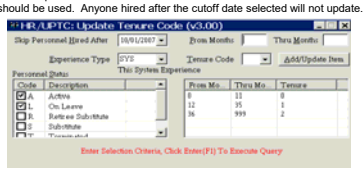


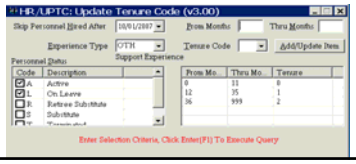
Updating Tenure Code

- Run the Update Tenure Code transaction to update employee tenure codes. You must run the transaction two times. Run the transaction once for employees with "This System Experience" and once for employees with "Support Experience". You can find this transaction under the Human Resources menu, then under the Personnel Procedures menu. The transaction should be called "Update Tenure Code".
- You can find the experience types for This System Experience and Support Experience in your payroll menu under PR Setup, then under HR Code Maintenance I, then under Tab #6 – Experience. This System Experience should be marked as State Code "T". Support Experience should be marked as State Code "O".
- Tenure Codes – Either 0,1 or 2
  - 0 = Zero to 11 months of experience
  - 1 = 12 to 35 months of experience
  - 2 = 36 and greater months of experience

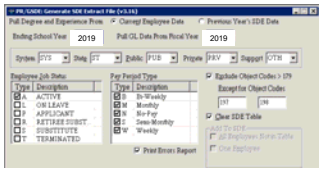
Updating Tenure Codes

- Below are two print screens of how the transactions should be run. You must decide what cutoff date should be used. Anyone hired after the cutoff date selected will not update.





GENERATE SDE WORK TABLE



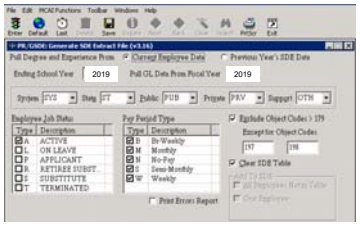
- Pull Personnel Data from Current Employee Data
  - Current Employee Records – data is pulled from employee maintenance, you must select the experience type that you wanted reported for system, state, public, private, and support.
- Ending School Year is the Fiscal Year for the Current SDE Work Table
- Pull GL Data From Fiscal Year where the GL information should pull from.
- Select the job status to include
- Select the job pay period types to include

18

GENERATE SDE WORK TABLE

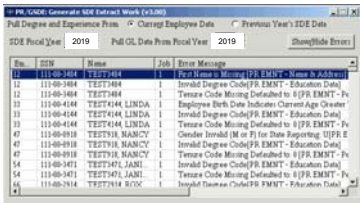
- **Check to exclude account numbers with object codes greater than 179**
- Select object code 197 and 198 to include coaching object codes
- Check to clear SDE tables, option is disabled when program has not been run for the SDE Fiscal Year selected. You do not want to clear if you have done any SDE maintenance.
- Add Records to SDE Work File, all employees that are not already in the table or one employee at a time, option is disabled when program has not been run for the SDE Fiscal Year selected

Press Enter button (F1)



GENERATE SDE WORK TABLE

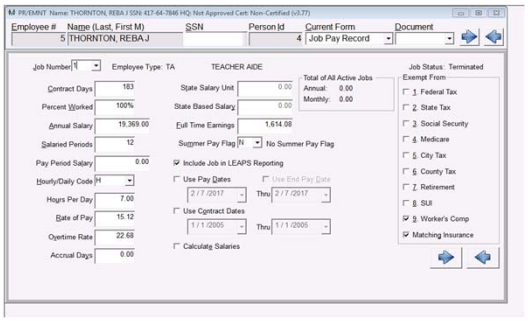
- If an Error listing appears after the file has generated, correct all reported exceptions and generate again.
- The list of errors can be printed or exported to excel by pressing the PrtScr toolbar button (F11).
- The message is displayed under the Error Message heading. To the right of the message is a form name and a screen name in brackets.



Extract – Error Listing

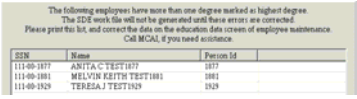
Employee	Name	Job	Error Message
5	THORNTON, REBA	1	Acct#: 12-5-9140-101-9660-5351-0-4711-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
91	ALLRED, JUDITH	4	Acct#: 11-5-1100-010-0020-6001-0-1500-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
184	STANSBERRY, ANGELA	4	Acct#: 11-5-1100-010-0020-6001-0-2400-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
195	ANDERSON, ANNA	1	Employment Date Cannot Be Blank [PR EMNT - Employee Data]
216	OAKS, CAROLYN	1	Acct#: 12-5-9140-101-9660-5351-0-4711-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
260	CALLIGARIS, ELIZABETH	1	Annual Salary Equals Zero [PR EMNT - Job Pay Record]
260	CALLIGARIS, ELIZABETH	1	Acct#: 11-5-1100-010-0040-1110-0-1200-0000 Cannot Calculate Job Distribution [PR EMNT - Job G/L Dist]
320	BUTTS, JANICE	1	Acct#: 11-5-9130-134-0030-6001-0-4800-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
327	GRAVEMAN, CAROL	1	Acct#: 12-5-4120-161-9660-5351-0-8410-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
338	WHITE, TAMARA	1	Acct#: 12-5-9140-129-9660-5351-0-4711-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
340	CAVAZOS, GUDELIA	1	Contract Days Less Than or Equal to Zero [PR EMNT - Job Pay Record]
340	CAVAZOS, GUDELIA	1	Annual Salary Equals Zero [PR EMNT - Job Pay Record]
340	CAVAZOS, GUDELIA	1	Acct#: 11-5-2150-135-8210-6001-0-8210-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
340	CAVAZOS, GUDELIA	1	Acct#: 11-5-2150-135-8210-6001-0-8210-0000 Cannot Calculate Job Distribution [PR EMNT - Job G/L Dist]
384	BICE, LOIS	1	Acct#: 12-5-9140-101-9660-5351-0-4711-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
437	ANDREWS, LORI	3	Acct#: 11-5-1100-010-0020-6001-0-2400-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
483	BAGLEY, WILLIAM	5	Acct#: 11-5-1100-010-0020-6001-0-1500-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
486	MANN, DEBORAH	2	Acct#: 12-5-4120-103-9660-5351-0-8410-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
486	MANN, DEBORAH	3	Contract Days Less Than or Equal to Zero [PR EMNT - Job Pay Record]
486	MANN, DEBORAH	3	Annual Salary Equals Zero [PR EMNT - Job Pay Record]
486	MANN, DEBORAH	3	Acct#: 12-5-4120-161-9660-5351-0-8410-0000 Invalid G/L Cost Center [PR EMNT - Job G/L Dist]
486	MANN, DEBORAH	3	Acct#: 12-5-4120-161-9660-5351-0-8410-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
486	MANN, DEBORAH	3	Acct#: 12-5-4120-161-9660-5351-0-8410-0000 Cannot Calculate Job Distribution [PR EMNT - Job G/L Dist]
494	JACKSON, KRISTI	4	Acct#: 11-5-1100-010-0030-6001-0-1200-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
522	GREEN, SHARON	2	Acct#: 11-5-9130-134-0040-6001-0-4800-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
545	KILPATRICK, MICHAEL	1	Contract Days Less Than or Equal to Zero [PR EMNT - Job Pay Record]
545	KILPATRICK, MICHAEL	1	Annual Salary Equals Zero [PR EMNT - Job Pay Record]
545	KILPATRICK, MICHAEL	1	Acct#: 11-5-3900-159-0030-1110-0-8390-0000 Full Time Equivalent Equals Zero [PR EMNT - Job G/L Dist]
545	KILPATRICK, MICHAEL	1	Acct#: 11-5-3900-159-0030-1110-0-8390-0000 Cannot Calculate Job Distribution [PR EMNT - Job G/L Dist]

Including/Excluding Jobs

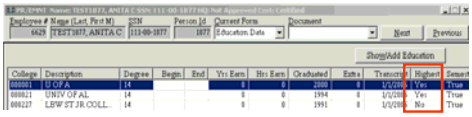


GENERATE SDE WORK TABLE

- If you have any employees that have more than one degree code marked as highest degree, an error listing will appear. You must correct these records before proceeding.



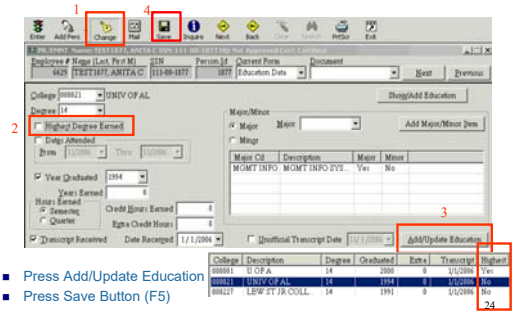
- Go to employee maintenance, pull up the employee and select the Education Data form



23

GENERATE SDE WORK TABLE

- Press Change Button (F3)
- Select the college degree that is inappropriately marked as highest degree and uncheck Highest Degree Earned.

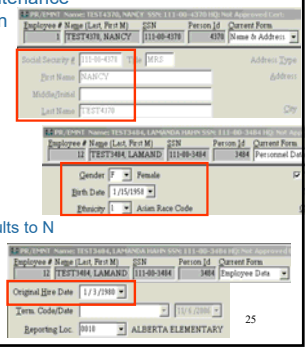


- Press Add/Update Education
- Press Save Button (F5)

24

GENERATE SDE WORK TABLE

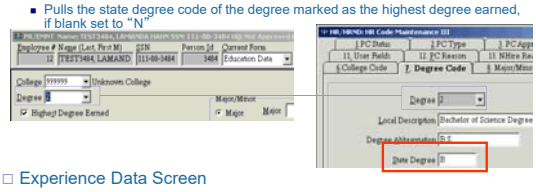
- Based on Current Employee Data, the following fields are pulled from employee maintenance
  - Name & Address Screen
    - Social Security Number
    - Last Name
    - First Name
    - Middle Name
  - Personnel Data Screen
    - Gender
    - Birth Date
    - Ethnicity
    - Spanish Speaking defaults to N
    - Tenure
  - Employee Data Screen
    - Employee Number
    - Hire Date



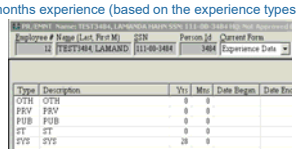
25

GENERATE SDE WORK TABLE

- Education Data Screen
  - Pulls the state degree code of the degree marked as the highest degree earned, if blank set to "N"



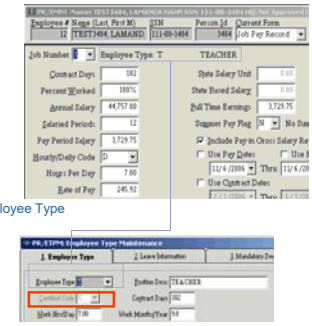
- Experience Data Screen
  - Pulls the number of months experience (based on the experience types selected)
    - System
    - State
    - Public
    - Private
    - Support



26

GENERATE SDE WORK TABLE

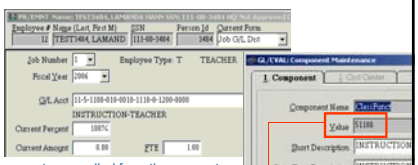
- Job Pay Record Screen
  - Job Number
  - Contract Days
  - Annual Salary
  - Salaried Periods
  - Pay Period Salary
  - Hourly/Daily Code
  - Hours Per Day
  - Hourly Daily Rate
  - Certified Flag Code from Employee Type

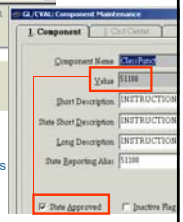


27

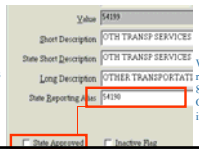
GENERATE SDE WORK TABLE

- Job GL Distribution Screen (based on the GL Fiscal Year)
  - Current Percent
  - Current Amount
  - FTE





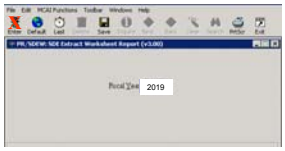
- The following components are pulled from the account number and are looked up in component maintenance to determine if the state reporting alias should be used. If state approved is unchecked then the state reporting alias value is reported.
  - Class/Function
  - Object
  - Cost Center
  - Source of Funds
  - Program



Work Location is set to the employee's reporting location. If this value is within 8600-8699, the value is set to 0000. Otherwise, if the value is greater than 6994, it is set to 0001.

SDE EXTRACT WORKSHEET REPORT

- Select the Fiscal Year to report and press Enter toolbar button (F1)



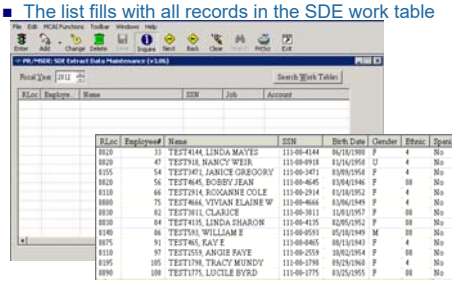
Report is printed in report location, last name, first name order

SOC SEC #	EMPLOYEE	CNTR	JA	SYSTEM	SYSTEM	SYSTEM	SYSTEM	SYSTEM	POSITION
111-00-1050	TEST1050, SHIRLEY	0001	1	24	--------	--------	--------	--------	0
111-00-1056	TEST1056, BRENDA	0001	1	36	--------	--------	--------	--------	0
111-00-1065	TEST1065, HAZEL	0001	1	180	--------	--------	--------	--------	0
111-00-1097	TEST1097, NOEL	0001	1	228	--------	--------	--------	--------	0
111-00-0112	TEST112, MICHAEL	0001	1	156	12	--------	--------	--------	0
111-00-1129	TEST1129, DEANNA	0001	1	96	--------	--------	--------	--------	0
111-00-1133	TEST1133, SHIRLEY	0001	1	204	--------	--------	--------	--------	0
111-00-1167	TEST1167, PAULA	0001	1	72	--------	--------	--------	--------	0
111-00-1192	TEST1192, TONYA	0001	1	--------	--------	--------	--------	--------	0
111-00-0212	TEST212, MARY	0001	1	156	--------	--------	192	--------	0
111-00-1306	TEST1306, EARL	0001	1	--------	--------	--------	--------	--------	0
111-00-1318	TEST1318, CARRIE	0001	1	372	--------	--------	--------	--------	0
111-00-1343	TEST1343, JOYCE	0001	1	144	84	--------	--------	--------	0
111-00-1397	TEST1397, WALTER	0001	1	--------	12	--------	--------	--------	0

29

SDE WORK TABLE MAINTENANCE

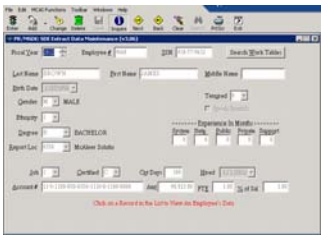
- Select the Fiscal Year to view and press the Enter toolbar button
- The list fills with all records in the SDE work table



30

SDE WORK TABLE MAINTENANCE

- Click on a record in the list to view
- It is PREFERRED that all data corrections are made in employee maintenance. However, the SDE records can be altered by pressing the Change toolbar button (F3), making the data correction, and pressing the Save toolbar button (F5)

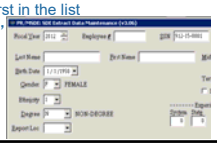


31

SDE WORK TABLE MAINTENANCE

- To Add a Vacancy, press the drop down arrow next to the Add toolbar button and click Add Vacancy.

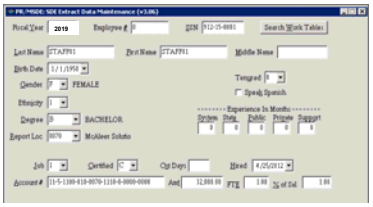
- The forms clears except for the default values
  - SSN – Defaults to 9 + the last two digits of the fiscal year + state reporting code + sequence number
  - Birth Date – Defaults to 01-01-1950
  - Speak Spanish – Defaults to uncheckd/' N'
  - Gender – Defaults to the first in the list which is 'F'
  - Ethnicity – Defaults to first in the list
  - Degree – Defaults to 'N'



32

SDE WORK TABLE MAINTENANCE

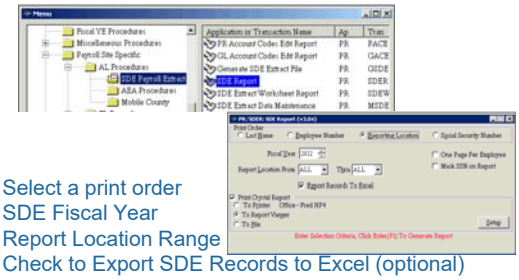
- Key in the rest of the data for the vacancy and press the save toolbar button (F5)
- Employee Number is no longer a required field for a vacancy so leave it blank
- If you have multiple vacancies you will need to click Add Vacancy for each new position.



33

LEAPS REPORT

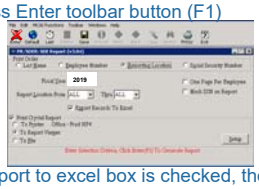
- SDE report transaction (PR/SDER) located under the Generate SDE Work Table transaction on the menu



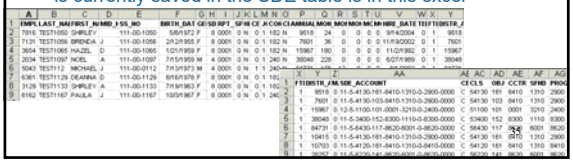
- Select a print order
- SDE Fiscal Year
- Report Location Range
- Check to Export SDE Records to Excel (optional)
- Check to Print the Crystal Report

LEAPS REPORT

- Press Enter toolbar button (F1)

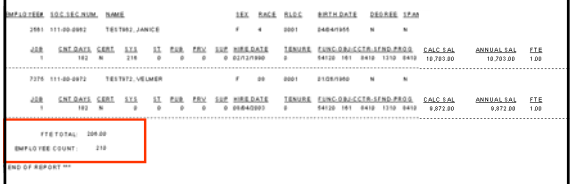


- If export to excel box is checked, then an excel worksheet will appear and start to fill. Every field that is currently saved in the SDE table is in this excel



LEAPS REPORT

- If the crystal report box is checked, then the crystal report appears
  - Added a total FTE to the end of the report
  - Added an employee count to the end of the report



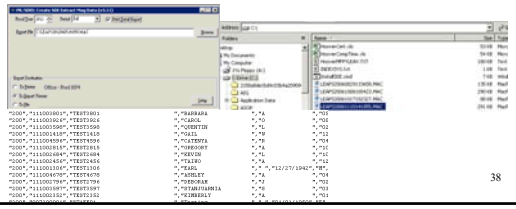
Degree/Years of Experience Matrix

The Matrix Report pulls directly from the work file created during the SDE File Extract

Prior Yrs Exp	Curr Yrs Exp	FTE/CNT	BA Prior	BA Curr	MA Prior	MA Curr	6Y Prior	6Y Curr	PhD Prior	PhD Curr	None Prior	None Curr
-	50	FTE	-	35.00	-	57.00	-	5.00	-	3.00	-	3.00
-	50	CNT	-	35	-	54	-	5	-	3	-	3
50	51	FTE	32.00	8.00	52.00	8.50	5.00	5.00	5.00	7.00	4.00	5.00
50	51	CNT	68	10	56	10	5	5	5	7	4	5
51	52	FTE	5.00	7.00	5.00	5.00	5.00	7.00	1.00	3.00	3.00	3.00
51	52	CNT	5	8	5	10	5	7	1	3	3	3
52	53	FTE	7.00	8.00	5.00	12.00	1.00	5.00	3.00	3.00	3.00	3.00
52	53	CNT	7	8	10	10	1	5	3	3	3	3
53	54	FTE	9.00	2.00	12.00	5.00	1.00	5.00	5.00	3.00	3.00	3.00
53	54	CNT	9	2	12	5	1	5	5	3	3	3
54	55	FTE	2.00	9.00	5.00	1.00	3.00	5.00	5.00	3.00	3.00	3.00
54	55	CNT	2	9	5	1	3	5	5	3	3	3
55	56	FTE	3.00	3.00	1.00	1.00	3.00	2.00	5.00	3.00	3.00	3.00
55	56	CNT	3	3	1	1	3	2	5	3	3	3
56	57	FTE	3.00	2.00	1.00	3.00	2.00	3.00	3.00	3.00	3.00	3.00
56	57	CNT	3	2	1	3	2	3	3	3	3	3
57	58	FTE	2.00	1.00	3.00	1.00	3.00	1.00	3.00	3.00	3.00	3.00
57	58	CNT	2	1	3	1	3	1	3	3	3	3
58	59	FTE	3.00	3.00	3.00	3.00	1.00	1.00	3.00	3.00	3.00	3.00
58	59	CNT	3	3	3	3	1	1	3	3	3	3
59	60	FTE	3.00	1.00	3.00	3.00	1.00	1.00	3.00	3.00	3.00	3.00
59	60	CNT	3	1	3	3	1	1	3	3	3	3
60	61	FTE	3.00	3.00	3.00	3.00	1.00	1.00	3.00	3.00	3.00	3.00
60	61	CNT	3	3	3	3	1	1	3	3	3	3
61	62	FTE	3.00	3.00	3.00	3.00	1.00	3.00	3.00	3.00	3.00	3.00
61	62	CNT	3	3	3	3	1	3	3	3	3	3
62	63	FTE	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
62	63	CNT	3	3	3	3	3	3	3	3	3	3
63	64	FTE	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
63	64	CNT	3	3	3	3	3	3	3	3	3	3
64	65	FTE	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
64	65	CNT	3	3	3	3	3	3	3	3	3	3

CREATE SDE EXTRACT FILE

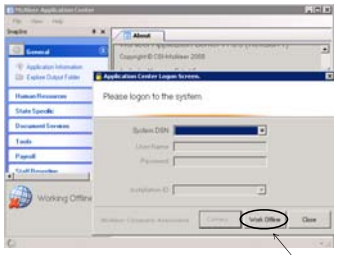
- Select the fiscal year to report
- Check to print the detail report
- Select the location to export the file
- Please do not change the file name
- Press Enter toolbar button (F1)
- If you have any errors you will get a pop up box. You can fix these problems in Employee Maintenance or SDE Maintenance if you want them corrected on the file.



38

APPROVE SDE LEAPS FILE

(Launch the Application Center*)



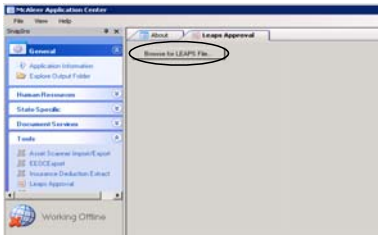
*Additional instructions will be provided to each district regarding starting the application center on their system in a separate document.

Once the Application Center is launched, select to "Work Offline"

39

APPROVE SDE LEAPS FILE

(Select the Approval Transaction)



- Select State Specific and Alabama, on the left hand side of the screen
- Select Leaps Approval
- Then click the Browse for LEAPS File and locate the file.

40

APPROVE SDE LEAPS FILE

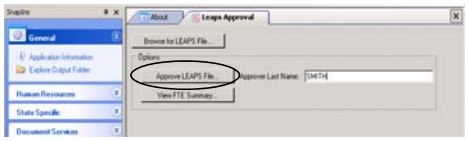
(View the Summary FTE Summary Data)

- Click the View FTE Summary button to view a recap of FTE's by Cost Center and Object Code.
- The data can be exported to Excel by clicking on the "Save" button and selecting a path to save the data.

41

APPROVE SDE LEAPS FILE

(Mark the file as Approved)



- Enter the last name of the person approving the file. This name is validated against the State Department of Education's Superintendent Directory
- Click the Approve LEAPS File
- The file will be marked as approved and is then ready to be submitted to the State.

42

Questions?