

PORTLAND PUBLIC SCHOOLS
STAFFING MANAGEMENT TOOL
(SMT)
USER GUIDE

MARCH 2015

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Introduction

SMT Guide Introduction

The Staffing Management Tool (SMT) is a Portland Public Schools custom component within PeopleSoft HRMS. It was first used in staffing for the 2006-2007 school year. The SMT replaced the job requisition process and is the method for PPS departments and schools to inform HR, Budget, Grant Accounting, Special Education, and ESL of changes to employees and vacancy and recruitment needs. In 2007-2008, the user interface was redesigned to streamline the data entry process and provide more meaningful data for all users.

The purpose of this document is to demonstrate the functions of the SMT and discuss the data entry required for managing staffing changes within the SMT.

This guide contains six sections, an index, and an appendix. The sections are as follows:

Introduction

This section offers an overview of the SMT layout, discussion of each page of the SMT, common features and general functionality across the SMT. The objective for this section is to orient users with the layout, and tips and tricks for navigation through the SMT.

Reports

The Reports section discusses the three reports available to all users: the SMT Detail Report, the SMT Staff Roster report and the Position Detail Roster report. The objective is to explain the contents in each report and the steps to running them through PeopleSoft's Process Scheduler.

Scenarios

This section, in a scenario format, addresses the decisions users are faced with when making staffing changes. It includes cross-references to SMT actions required to manage a given scenario and steps for actions that could be used to accomplish the scenario.

Actions

As employee or vacancy needs change, Principals and Department Managers need to communicate those changes via the SMT. These changes are triggered by selection of predefined Actions. Examples of changes to employees include unassignments, changes to funding, transfers, terminations and leaves of absence. The objective of this section is to explain all steps for entering each action in the SMT using screenshots from the actual tool.

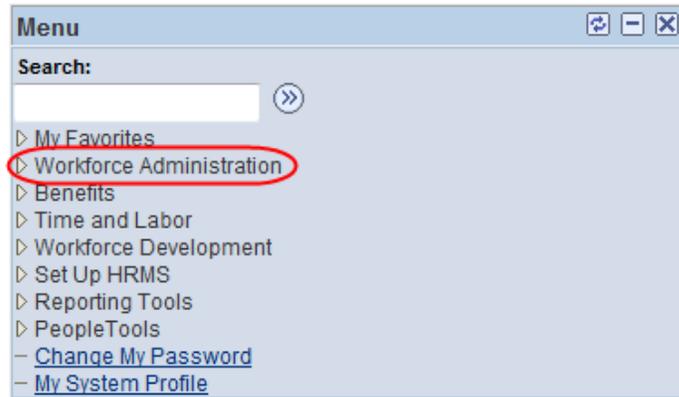
Submitting and Re-Opening Your SMT

After all changes have been entered into the SMT, Principals and Department Managers need to submit the SMT for approval and processing. This section shows how to Approve & Submit and Re-Open for additional editing.

Approval Process

Once the SMT is submitted, the five departments' approvers (Budget, Grant Accounting, Human Resources, Special Education, and ESL) review and approve actions. This section provides an overview of the process.

Step 5: Click the **Workforce Administration** link on the left side of the page.



Step 6: Click on one of the links to the **PPS SMT**.

You can click on the link in the left column or on the icon in the center of the page.



OR



Step 7: Enter Fiscal Year, your Department ID and Location ID.

Hint for selecting Fiscal Year:
Choose the year that the school year ends in. Example: for the 2013-2014 school year, select 2014 as your Fiscal Year.

You **MUST** enter **BOTH Department ID and Location ID** to be able to *make changes* to your SMT. You can view an SMT by Department or Location alone.

You can use the Magnifying Glass to look up your Department ID or Location ID if necessary.

Step 8: Click Search.

PPS SMT

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Fiscal Year: = [] 2014

Business Unit: begins with PPS1J

Department: begins with 6987

Location Code: begins with 110

Include History

Search Clear Basic Search Save Search Criteria

NOTE: There are four main tabs for the SMT.

Step 9: View the Staffing Summary tab.

The **Staffing Summary tab** displays a complete list of regular staff and vacancies in two sections: Filled Positions and Vacant Positions.

NOTE: Your General Fund and Title I balances are listed at the top of the page. You will not be able to Submit your SMT until you have balanced your FTE.

Staffing Summary Limited Term Staffing Summary Funding Summary Allocations & Balances

Fiscal Year 2014

Department 6987 Imagination
Location 110 Imagination K-8
Status Open

General Fund Balance **0.500**
Title I Balance **0.090**
Title IC Balance **0.000**

Filled Positions Personalize Find View All First 1-15 of 30 Last

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date
▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014
▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013
△	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	1.000	Active	07/01/2013

Step 10: Click the Limited Term Staffing Summary tab.

The **Limited Term Staffing Summary** displays a complete list of limited term staff and vacancies in two sections: Filled Positions and Vacant Positions.

NOTE: FTE balances are not affected by Limited Term positions, as they carry no FTE attached to them.

Staffing Summary **Limited Term Staffing Summary** Funding Summary Allocations & Balances

Department	6987	Imagination	Fiscal Year	2014
Location	110	Imagination K-8	General Fund Balance	0.500
Status	Open		Title I Balance	0.090
			Title IC Balance	0.000

Filled Positions

Vacant Positions

Request New Limited Term Position

[Save](#) [Return to Search](#) [Notify](#)

Step 11: Click the Funding Summary tab.

The **Funding Summary** page displays FTE and funding information for all employees and vacant positions by funding types (General Fund, Title I, Foundation, Kindergarten Fee for Service, etc.).

Staffing Summary Limited Term Staffing Summary **Funding Summary** Allocations & Balances

Department	6987	Imagination	Fiscal Year	2014
Location	110	Imagination K-8	General Fund Balance	0.500
Status	Open		Title I Balance	0.090
			Title IC Balance	0.000

View/Change	Name	EmpID	Bot #	Emp Status	Assignment	Position #	Posn FTE	Dept	Loc	Funding Group	Account	Program	Class	Fund	PG
▲	Angelou,Maya	063249	0	Active	Teacher-K8 Gr 5	00001269	1.000	6987	110	Gen Fund Licensed	511100	11112	06000	101	
▲	Baez,Joan	021138	0	Active	Teacher-K8 Gr 4	00006999	0.700	6987	110	Gen Fund Licensed	511100	11112	06000	101	
▲	Sanders, Antonio	018830	0	Active	Teacher-K8 Gr 4 Spanish Imm	00000362	1.000	6987	110	Gen Fund Licensed	511100	11112	06000	101	
▲	Charles, Ray	017595	0	Active	Teacher-K8 Gr 1 Spanish Imm	00006998	1.000	6987	110	Gen Fund Licensed	511100	11112	06000	101	
▲	Christie, Agatha	005439	0	Active	Teacher-K8 Gr 2	00007000	1.000	6987	110	Gen Fund Licensed	511100	11112	06000	101	
▲	Curtis, Marie	011362	0		Principal-K8	00003668		6987	110	Gen Fund Adm- Licensed	511310	24101	99999	101	
▲	Dali, Salvador	021101	0	Active	Teacher-K8 Gr 3 Spanish Imm	00010948	1.000	6987	110	Gen Fund Licensed	511100	11112	06000	101	

View/Change	Name	EmpID	Bot #	Emp Status	Assignment	Position #	Posn FTE	Dept	Loc	Funding Group	Account	Program	Class	Fund	PG
▲	Ford, Harrison	019753	0		Teacher-K8 Gr K-5 Art	00006996		6987	110	Gen Fund Arts Licensed	511100	11111	13001	191	H0200
▲	Picasso, Pablo	021107	0	Active	Gr K-5 Art	00007001	0.500	6987	110	Gen Fund Arts Licensed	511100	11111	13001	191	H0200

Kindergarten Fee for Service

View/Change	Name	EmpID	Bot #	Emp Status	Assignment	Position #	Posn FTE	Dept	Loc	Funding Group	Account	Program	Class	Fund	PG
▲	Ryan, Ivan	021152	0	Active	Teacher-K8 Gr 4	00006999	0.300	6987	110	Title I School	511100	11112	06000	206	01120

Step 12: Click the Allocations & Balances tab.

The **Allocations & Balances** page contains all of the allocations and balances for all funding groups, counting both used and vacant FTE.

It will display the results of staffing changes you have made on previous pages, and will indicate the status of your SMT: "Open" or "Submitted".

Funding Group	Dept	Location	Allocation Type	Allocated Equiv	Used Equiv	Balance Equiv	Actual Position FTE
1 Gen Fund Licensed	1232	232	FTE	21.330	21.790	0.460	21.790
2 Gen Fund Classified Repr. 5 wt	1232	232	FTE	1.250	0.785	0.465	1.571
3 Gen Fund Admin-Licensed	1232	232	FTE	2.000	2.000	0.000	2.000
4 Gen Fund Kindergarten	1232	232	FTE	1.500	1.500	0.000	1.500
5 Gen Fund Classif Kinder. 5 wt	1232	232	FTE		0.004	0.004	0.009
General Fund FTE				26.080	26.079	0.001	26.870
Total Gen Fund FTE with Arts				26.580	26.579	0.001	27.370

This section is complete!

You have now logged into PeopleSoft HRMS, navigated to the SMT, and viewed the Staffing Summary, Limited Term Staffing Summary, Funding Summary and Allocations & Balances for your department and location.

Using SMT Features

This section shows how to use SMT page and grid features, select an employee or position record from the Staffing Summary and Limited Term Staffing Summary pages, add rows for new actions, delete a row to correct a mistake, and explains the difference between the OK, Cancel, and Apply buttons.

Page and Grid Features:

SMT Help: Click on this button to go to the SMT Help Page on PPS Inside.

Employee Lookup: Use this button to find any employee on any SMT by Employee ID, Name, or Position Number, to see information about all the places an employee works.

Run SMT Roster: Runs the SMT Roster Report for the SMT combination you are currently in.

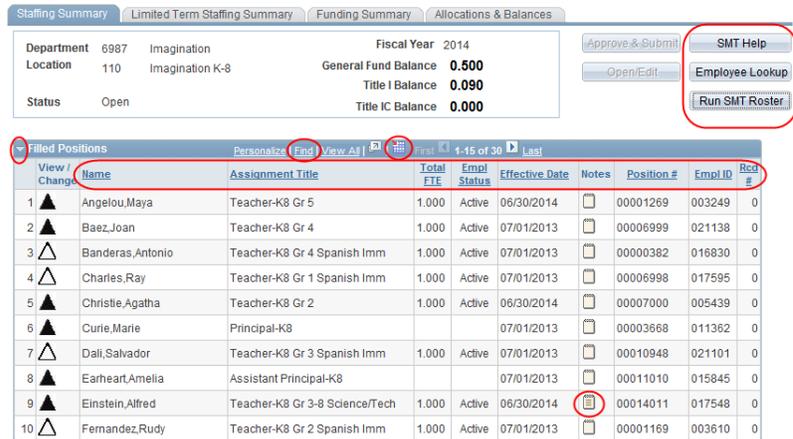
Hide Grid Arrow: Click on the  button to hide any of the grids/sections. For example, you can use this to hide the Filled Positions section.

Find: You can use this link to search for any item in a particular grid. It will return the row(s) to the top of the grid.

Open in Excel: You can click on the  table button to download the data to Excel.

Sorting by Column Name: You can click on any of the underlined columns to sort the data by that column (for example, you can sort by Assignment, Total FTE, etc.).

Notepad: You can click on the  button to add notes about an employee or position.



The screenshot shows the SMT Staffing Summary page. At the top, there are tabs for 'Staffing Summary', 'Limited Term Staffing Summary', 'Funding Summary', and 'Allocations & Balances'. Below the tabs, there is a summary section with the following data:

Department	6987	Imagination	Fiscal Year	2014
Location	110	Imagination K-8	General Fund Balance	0.500
			Title I Balance	0.090
Status	Open		Title IC Balance	0.000

On the right side of the summary section, there are buttons for 'Approve & Submit', 'Open/Edit', 'SMT Help', 'Employee Lookup', and 'Run SMT Roster'. The 'SMT Help', 'Employee Lookup', and 'Run SMT Roster' buttons are circled in red.

Below the summary is a grid of 'Filled Positions'. The grid has columns for 'View/Change', 'Name', 'Assignment Title', 'Total FTE', 'Empl Status', 'Effective Date', 'Notes', 'Position #', 'Empl ID', and 'Rec #'. The 'View/Change' column contains icons for up/down arrows, a plus sign, and a minus sign. The 'Name' column contains names like 'Angelou, Maya', 'Baez, Joan', etc. The 'Assignment Title' column contains titles like 'Teacher-K8 Gr 5', 'Teacher-K8 Gr 4', etc. The 'Total FTE' column contains values like 1.000. The 'Empl Status' column contains values like 'Active'. The 'Effective Date' column contains dates like '06/30/2014', '07/01/2013', etc. The 'Notes' column contains icons for adding notes. The 'Position #' column contains numbers like '00001269', '00006999', etc. The 'Empl ID' column contains numbers like '003249', '021138', etc. The 'Rec #' column contains values like '0'. The 'View/Change' column is circled in red.

View All: From the Staffing Summary Page, **Click the View All** option to see all of the employees and positions. You can also view by the First or Last 15 rows of a Department/Location.

View/Change details for Employees or Positions:

You cannot make any edits to employees or positions from the Staffing Summary pages. You must select a specific employee or vacant position to have the ability to make changes.



Click on the  for the row you want to change.

Scroll down if the employee or position you want to change is not shown.

Staffing Summary | Limited Term Staffing Summary | Funding Summary | Allocations & Balances

Department 6987 Imagination Fiscal Year 2014
 Location 110 Imagination K-8 General Fund Balance 0.500
 Status Open Title I Balance 0.090
 Title IC Balance 0.000

Approve & Submit SMT Help
 Open/Edit Employee Lookup
 Run SMT Roster

Filled Positions Personalize | Find **View All** | First 1-15 of 30 Last

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
1 ▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
2 ▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
3 ▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	1.000	Active	07/01/2013		00000382	016830	0
4 ▲	Charles, Ray	Teacher-K8 Gr 1 Spanish Imm	1.000	Active	07/01/2013		00006998	017595	0
5 ▲	Christie, Agatha	Teacher-K8 Gr 2	1.000	Active	06/30/2014		00007000	005439	0
6 ▲	Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
7 ▲	Dali, Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010948	021101	0
8 ▲	Earheart, Amelia	Assistant Principal-K8			07/01/2013		00011010	015845	0
9 ▲	Einstein, Alfred	Teacher-K8 Gr 3-8 Science/Tech	1.000	Active	06/30/2014		00014011	017548	0
10 ▲	Fernandez, Rudy	Teacher-K8 Gr 2 Spanish Imm	1.000	Active	07/01/2013		00001169	003610	0

On the Baseline row, verify that you have selected the intended employee.

NOTE: You cannot delete or edit the Baseline row.



Click the  to add a new row to the employee's SMT record.

Never insert a row in between other rows, even if the effective date is out of order. If multiple rows exist for an employee or vacancy, be sure to add rows only at the end of existing rows.

NOTE: To correct a mistake by deleting a row, click the . After deleting the row, **you MUST click OK or Apply** before adding or changing any other rows.

View/Change

Department 6987 Imagination Notes Fiscal Year 2014
 Location 110 Imagination K-8 General Fund Balance 0.500
 Employee 016830 Banderas, Antonio Title I Balance 0.090
 Title IC Balance 0.000

Personalize | Find | First 1-2 of 2 Last

	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Posit
1 + -	07/01/2013	1	Baseline	Banderas, Antonio	016830	0	0000
2 + -						0	

OK Cancel Apply

Specific Employee Lookup: You can look up detailed information about an employee by clicking on the Employee ID hyperlink.

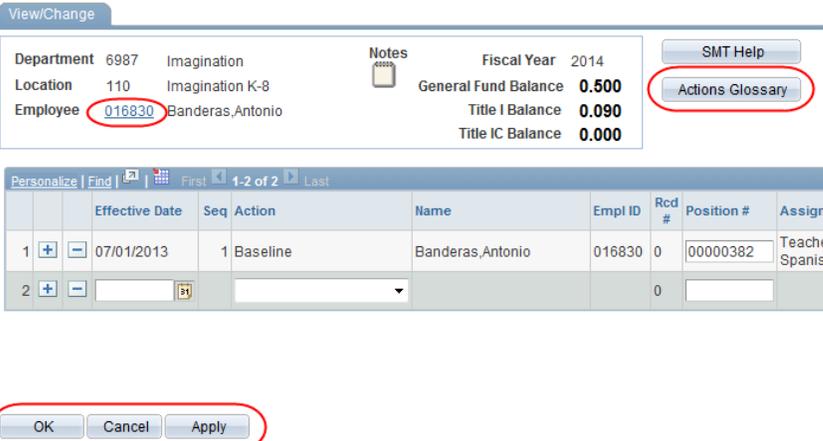
Actions Glossary: You can view a list of actions and their definitions by clicking on this button.

OK / Cancel / Apply buttons:

Click **OK** to save your changes to the record and return to the Staffing Summary pages.

Click **Cancel** to exit the record without saving your changes and return to the Staffing Summary pages.

Click **Apply** to save your changes without leaving the page.



The screenshot shows the 'View/Change' page for an employee. At the top, there are fields for Department (6987 Imagination), Location (110 Imagination K-8), and Employee (016830 Banderas, Antonio). To the right, there are balance fields: General Fund Balance (0.500), Title I Balance (0.090), and Title IC Balance (0.000). A 'Notes' icon is also present. On the far right, there are buttons for 'SMT Help' and 'Actions Glossary', both of which are circled in red in the original image.

Below this is a grid with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, and Assign. The first row shows an effective date of 07/01/2013, sequence 1, action 'Baseline', name 'Banderas, Antonio', empl ID 016830, and record number 0. The second row is a new entry with an empty effective date, sequence 2, and record number 0.

At the bottom of the screenshot, there are three buttons: 'OK', 'Cancel', and 'Apply', all of which are circled in red.

<p>This section is complete!</p>	<p>You have now learned about SMT page and grid features, selected an employee or position record, added a row for a new action, and learned how to delete rows.</p> <p>You have also learned about the OK, Cancel and Apply buttons.</p>
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Reports

SMT Detail Report

This report includes all employees and vacant positions, including limited term, and provides details of actions performed in the SMT with full Chartfield information.

The steps below demonstrate how to create a Run Control ID and run a PPS SMT Detail Report.

Step 1: Select PPS SMT Detail Report from the left menu.

Step 2: If you already have a Run Control ID, Click Search to find and select it. Skip Steps 3-5.

Menu ⌵ ⌵ ⌵

Search:

»

- ▷ My Favorites
- ▽ Workforce Administration
 - ▷ Personal Information
 - ▷ Job Information
 - ▷ Workforce Reports
 - PPS SMT
 - **PPS SMT Detail Report**
 - [PPS SMT Position Detail Roster](#)
 - [PPS SMT Staff Roster](#)
- ▷ Benefits
- ▷ Time and Labor
- ▷ Workforce Development

PPS SMT Detail Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▽ Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

Find an Existing Value | [Add a New Value](#)

Step 7: **Enter the Fiscal Year** for the SMT Detail report.

Step 8: **Enter the Department and Location Code.**

NOTE: If necessary, you can use the  buttons to look up the Department and Location Codes.

Step 9: **Select one of the three Report Types.**

- **All transaction records** – displays all SMT actions as well as the Baseline
- **Baseline records only**– displays only Baseline rows
- **Most current records** – displays the most recent SMT action for each individual or vacancy

NOTE: If you leave this line blank, the report will default to show all transaction records.

Step 10: **Click Save** to save these parameters with the Run Control ID.

Step 11: **Click Run** to start the report.

PPS SMT Detail Report

Run Control ID: Detail_Report [Report Manager](#) [Process Monitor](#) **Run**

Run Parameters

*Fiscal Year: 2014

Single Department/Location OR Department Range

Dept ID: 6987  Imagination Location: 110 

Report Type: All transaction records

All transaction records
Baseline records only
Most current records

Save  Return to Search  Previous in List  Next in List  Notify  Add

Step 12: **Select Window** for the report output type.

Step 13: **Select the Format for the report. You should select EITHER PDF or CSV.**

NOTE: You can select CSV if you would like the report to open in Excel. Selecting PDF will open the report in Adobe Reader.

Step 14: **Click OK** to run the report.

Process Scheduler Request

User ID: _____ Run Control ID: Detail_Report

Server Name: Run Date: 07/16/2013

Recurrence: Run Time: 8:24:05AM

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PPS SMT Detail Report	PPSSMT14	SQR Report	Window	PDF	Distribution

Step 15: **View the report status messages** that appear in a new window.

NOTE: If the server is very busy, the report may take longer to run.

Queued

Process Name:

Process Instance:

Success

Process Name:

Process Instance:

Step 16: The SMT Detail Report will open in the new window.

Information about the report run is at the top of the page, followed by rows of actions that affect your employees and vacant positions, including limited term employees. Chartfield information is also displayed.

If you selected the **All Transaction Records** report type, you will see a record of EVERY transaction that has impacted an employee or position.

If you selected the **Baseline Only** report type, you will see only the original status and funding for employees and positions

If you selected the **Most Current Records** report type, you would only see the most recent action for each employee or position

Step 17: For PDF files, **Click Save a Copy** at the top of the page to keep a copy of this report. For CSV files, press F12 to save as an Excel document.

Report ID: PPSMTU4.sqr
 Page No: 1
 Run Date: 07/16/2013
 Run Time: 08:28:12

PPS SMT Detail Report
 Fiscal Year: 2014
 Department: 6987 Imagination
 Location: 110 Imagination K-8
 Report Type: All transaction records

Action	Loc	Empl114	Empl	Name	Empl	Stat	Posn	Num	Assignment	FTE	FTE	Equiv	Dept	Acct	Pyrm	Class	Fnd	P/G
Baseline	110	004095	1	Allbaugh, Cheryl A	L		00015140		LOA Counselor-K8	0.25	0.25	6987	511100	21220	99999	101		
LOA Return	110	004095	0	Allbaugh, Cheryl A	A		00015140		LOA Counselor-K8	0.25	0.25	6987	511100	21220	99999	101		
Inactiv Po	110	004095	0	Allbaugh, Cheryl A			00015140		LOA Counselor-K8	0.00	0.00	6987	511100	21220	99999	101		
Baseline	110	003249	0	Angelou, Maya	A		00001269		Teacher-K8 Gr 7-8 Math/Read	0.50	0.50	6987	511100	11211	10000	101		
Baseline	110	003249	0	Angelou, Maya	A		00001269		Teacher-K8 Gr 7-8 Math/Read	0.50	0.50	6987	511100	11211	18000	101		
Mod Posn	110	003249	0	Angelou, Maya	A		00001269		Teacher-K8 Gr 5	1.00	1.00	6987	511100	11112	06000	101		
Baseline	110	021138	0	Baez, Joan	A		00006999		Teacher-K8 Gr 1-2	1.00	1.00	6987	511100	11112	06000	101		
Mod Posn	110	021138	0	Baez, Joan	A		00006999		Teacher-K8 Gr 4	0.70	0.70	6987	511100	11112	06000	101		
Mod Posn	110	021138	0	Baez, Joan	A		00006999		Teacher-K8 Gr 4	0.30	0.30	6987	511100	11112	06000	205	01320	
Baseline	110	016830	0	Bandreas, Antonio	A		00000982		Teacher-K8 Gr 4 Spanish Imm	1.00	1.00	6987	511100	11112	06000	101		
Baseline	110	017595	0	Charles, Ray	A		00006998		Teacher-K8 Gr 1 Spanish Imm	1.00	1.00	6987	511100	11112	06000	101		

The report is complete!

You have now run a PPS SMT Detail report for your department and location.

SMT Staff Roster Report

This report shows your FTE allocations by funding category, a list of employees and vacant positions, using FTE within these categories, and balances available. Limited Term positions are listed separately below FTE positions. The report can be run from within the SMT or from the menu. When run from within the SMT, it will automatically include any SPED, ESL, or District-funded Immersion positions at your location.

Step 1: You can run the PPS SMT Staff Roster by pressing the “Run SMT Roster” button on the Staffing Summary page.

It will automatically default to the department and location of the SMT you are in. Special Ed and ESL positions will be included if any are present at your location. The Roster will display as a PDF file.

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
1 ▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
2 ▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
3 ▲	Randerson, Antonio	Teacher, K8 Gr 4 Spanish Imm	1.000	Active	07/01/2013		00000382	016830	0

Step 2: View the report status messages that appear in a new window.

NOTE: If the server is very busy, the report may take longer to run.

Queued

Process Name: **PPSSMT90** PPS SMT Staff Roster

Process Instance: **530096** Process Type: **SQR Report**

Step 3: The first page of your PPS SMT Staff Roster will open in the new window.

The cover sheet displays the details of your FTE allocations.

PPS SMT Staff Roster

Fiscal Year: 2014
 Department: 6987 Imagination with ESL
 Location: 110 Imagination K-8
 Run Date: 07/15/2013
 Run Time: 13:28:23

Funding Group	FTE
Gen Fund Licensed	17.150
Gen Fund Classified Repr 5 wt	1.250
Gen Fund Admin-Licensed	2.000
Gen Fund Kindergarten	1.500
Gen Fund Counselor	1.000
Total General Fund	22.900
Title I School Based	1.000
Title I Central / K	1.500

Step 4: The following pages of your PPS SMT Staff Roster show your employees and vacant positions with their funding categories. Limited Term employees show at the end of the employee list.

The last page of the report summarizes Allocated, Used and Balance Available FTE by funding category.

You can also save this report for later use by **clicking Save a Copy.**

Dept	Loc	Name	Empl ID #	EE St	Pom FTE	Position Number	Assignment	Licensed Equivalent				Full-Weighted				
								Gen Fund (incl Arts)	K-12 Fee/ Svc	Foundatn	Title I	ESL	SpEd	Nutr Svcs	Other	
6987	110	Angelou,Maya	002149	0	A	1.000	00001289	Teacher-K3 Gr 3	1.000							
6987	110	Baez,Joan	021138	0	A	1.000	00006999	Teacher-K3 Gr 4	0.700			0.300				
6987	110	Banaderas,Antonio	016830	0	A	1.000	00000382	Teacher-K3 Gr 4 Spanish Imm	1.000							
6987	110	Charles,Ray	017595	0	A	1.000	00000698	Teacher-K3 Gr 1 Spanish Imm	1.000							
6987	110	Christie,Agatha	005439	0	A	1.000	00007000	Teacher-K3 Gr 2	1.000							
6987	110	Dali,Salvador	021101	0	A	1.000	00010948	Teacher-K3 Gr 3 Spanish Imm	1.000							
6987	110	Einstein,Alfred	017548	0	A	1.000	00014011	Teacher-K3 Gr 3-8 Science/Te	1.000							
6987	110	Fernandez,Fudy	003610	0	A	1.000	00001169	Teacher-K3 Gr 2 Spanish Imm	1.000							
6987	110	Gorlind,Judy	004095	0	A	1.000	00014865	Counselor-K3	1.000							
6987	110	Goodall,Jane	001347	0	A	0.500	00007537	Teacher-K3 PE	0.500							
6987	110	Griffith,Joan	010767	0	A	1.000	00007672	Teacher-K3 Gr 1	1.000							
6987	110	Hayek,Salma	018021	0	A	1.000	00002911	Teacher-K3 Gr 5 Spanish Imm	1.000							
6987	110	Kahlo,Frida	020494	0	A	1.000	00006997	Teacher-K3 Gr 3	0.690			0.310				
6987	110	Keller,Helen	010807	0	A	1.000	00002694	Teacher-K3 Gr K	0.500			0.500				
6987	110	Kennedy,Jackie	015687	0	A	1.000	00004269	Principal's Secretary-K3	0.500							
6987	110	Lindbergh,Anne	012724	0	A	0.375	00010949	Teacher-K3 Gr 6-8 LA	0.375							
6987	110	Lindbergh,Anne	012724	0	A	0.375	00014302	Media Specialist-K3	0.375							
6987	110	Lindbergh,Anne	012724	1	L	0.250	00014302	Media Specialist-K3								
6987	110	Oakley,Anne	019950	0	A	1.000	00002185	Teacher-K3 Gr K	0.500			0.500				
6987	110	Picasso,Pablo	021107	0	A	0.500	00007001	Gr K-5 Art	0.500							
6987	110	Riversa,Diego	020392	0	A	1.000	00006995	Teacher-K3 Gr K Spanish Imm	0.500			0.500				
6987	110	Roosevelt,Eleanor	006461	0	A	1.000	00005201	Teacher-K3 Gr 3	1.000							
6987	110	Shakespeare,William	007738	1	L	0.250	00004914	Teacher-K3 LA/Reading								
6987	110	Shakespeare,William	007738	0	A	0.750	00004914	Teacher-K3 LA/Reading	0.750							
6987	110	Torres,Dara	016263	0	A	0.500	00006625	Library Assistant	0.250							
6987	110	Winfrey,Oprah	011753	0	A	1.000	00007308	Teacher-K3 Gr 1	0.700			0.300				
6987	110		0			1.000	00003668	Principal-K3	1.000							

Dept	Loc	Name	Empl ID #	EE St	Pom FTE	Position Number	Assignment	Licensed Equivalent				Full-Weighted				
								Gen Fund (incl Arts)	K-12 Fee/ Svc	Foundatn	Title I	ESL	SpEd	Nutr Svcs	Other	
6987	110		0		1.000	00007022	School Secretary-K3	0.500								
6987	110		0		1.000	00011010	Assistant Principal-K3	1.000								
6987	110	Berry,Halle	016263	0	A	0.120	NEW00631	Library Assistant	0.060							
6987	110	Bullock,Sandra	016873	0	A	1.000	NEW00590	Teacher-K3 Gr 6-8 Reading	1.000							
6987	110	Mouse,Mickey	029999	0	A	0.500	00019999	Student Management Specialis	0.500							
6987	110	Parks,Rosa	016085	0	A	1.000	00015604	Teacher-K3 Gr 6 Spanish Imm	1.000							

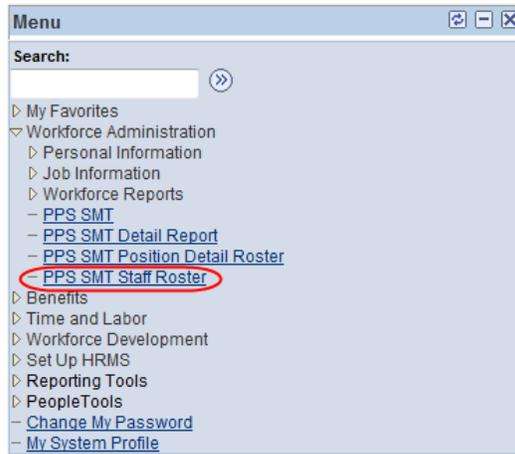
FTE Used by Funding Source	22.900	0.000	0.000	2.410	0.000	0.000	0.000	0.000
Allocated FTE	22.900	0.000	0.000	2.500	0.000	0.000	0.000	0.000
Balance Available	0.000	0.000	0.000	0.090	0.000	0.000	0.000	0.000

Principal/Manager Authorization _____ Signature _____ Date _____

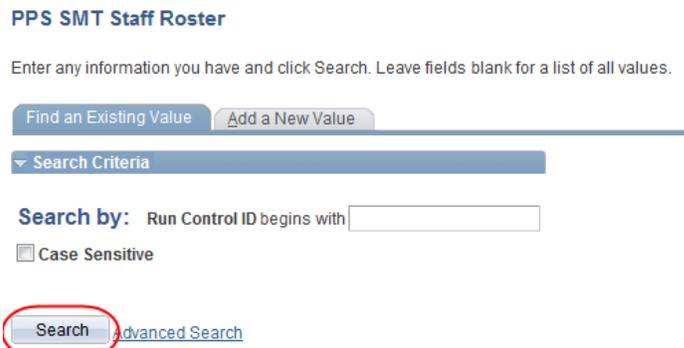
Regional/Department Office Approval _____ Signature _____ Date _____

The steps below demonstrate how to create a Run Control ID and run a PPS SMT Staff Roster report from the menu.

Step 1: Select PPS SMT Staff Roster from the left menu.



Step 2: If you already have a Run control ID, Click Search to find and select it. Skip steps 3-5. If you do not have a run control set up, proceed with step 3.



Step 3: If this is your first time running the SMT Staff Roster from the menu, you will need to Add a New Value to create a new Run Control ID.

Step 4: Enter a name for the new Run Control ID. Join names of more than one word with an underscore (“_”).

Step 5: Click Add to finish creating a Run Control ID.

PPS SMT Staff Roster

Find an Existing Value **Add a New Value**

Run Control ID:

Add

Step 6: Select the name of the Run Control ID you will use for this report.

NOTE: You can create and save separate run controls for different sets of parameters. You can also create just one run control and change the parameters on it as necessary.

PPS SMT Staff Roster

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

Search Results

View All First 1-3 of 3 Last

Run Control ID
SMT_ROS_RPT
Staff_Roster
TESTUSER

Step 7: Enter the Fiscal Year for the SMT Staff Roster.

Step 8: Enter the Department and Location Code. You can run the report for your department and location without Special Ed, ESL and Immersion (by leaving the boxes unchecked), or you can run a report for only Special Ed or ESL or Immersion at your location (by entering the SPED or ESL or Immersion Department number and your Location number).

NOTE: If necessary, you can use the  to look up the Department and Location Code.

Step 9: Click Save to save these parameters with the Run Control ID.

Step 10: Click Run to start the report.

Step 11: Select Window for the report output type.

Step 12: Select the Format for the report. You should select either PDF or CSV.

NOTE: You can select CSV if you would like the report to open in Excel. Selecting PDF will open the report in Adobe Reader.

Step 13: Click OK to run the report.

Step 14. For PDF files, **Click Save a Copy** at the top of the page to keep a copy of this report. For CSV files, press F12 to save as an Excel document.

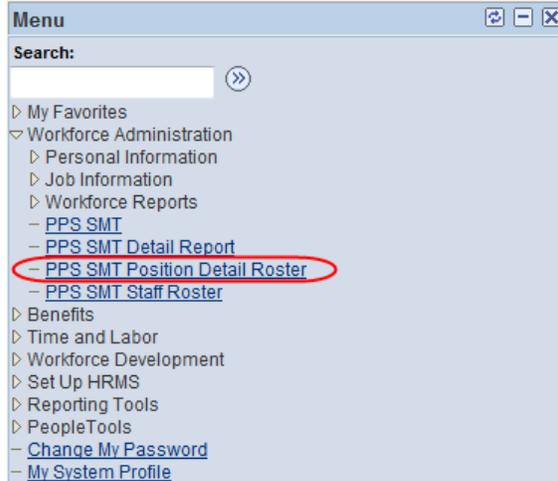
The report is complete!

You have now run a PPS SMT Staff Roster Report.

SMT Position Detail Roster Report

This report shows employee and position information including grade level, subject, and percentage of effort. You can choose to run it for a single department/location combination or a department range. You can also select to run it for a single funding source, or all sources.

Step 1: **Select PPS SMT Position Detail Roster** from the left menu.



Step 2: **If you already have a Run Control ID, Click Search to find and select it. Skip Steps 3-5.**

PPS SMT Position Dtls Roster

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Search Advanced Search

Search Results

View All First 1-4 of 4 Last

Run Control ID
Position Detail
SMT ROS RPT
Staff Roster
TESTUSER

Step 3: If this is your first time running a PPS SMT Position Detail Roster, you will need to **Add a New Value** to create a new Run Control ID.

Step 4: **Enter a name for the new Run Control ID.** Join names of more than one word with an underscore (“_”).

Step 5: **Click Add** to finish creating a Run Control ID.

PPS SMT Position Dtls Roster

Find an Existing Value **Add a New Value**

Run Control ID: Position_Detail

Add

Step 6: **Select the name of the Run Control ID** you will use for this report.

NOTE: You can create and save separate run controls for different sets of parameters. You can also create just one run control and change the parameters on it as necessary.

PPS SMT Position Dtls Roster

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Search by: Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

Search Results

View All First 1-4 of 4 Last

Run Control ID
Position_Detail
SMT ROS RPT
Staff Roster
TESTUSER

Step 7: **Enter the Fiscal Year** for the SMT Position Detail Roster.

Step 8: **Select either a Single Department/Location or a Department Range.**

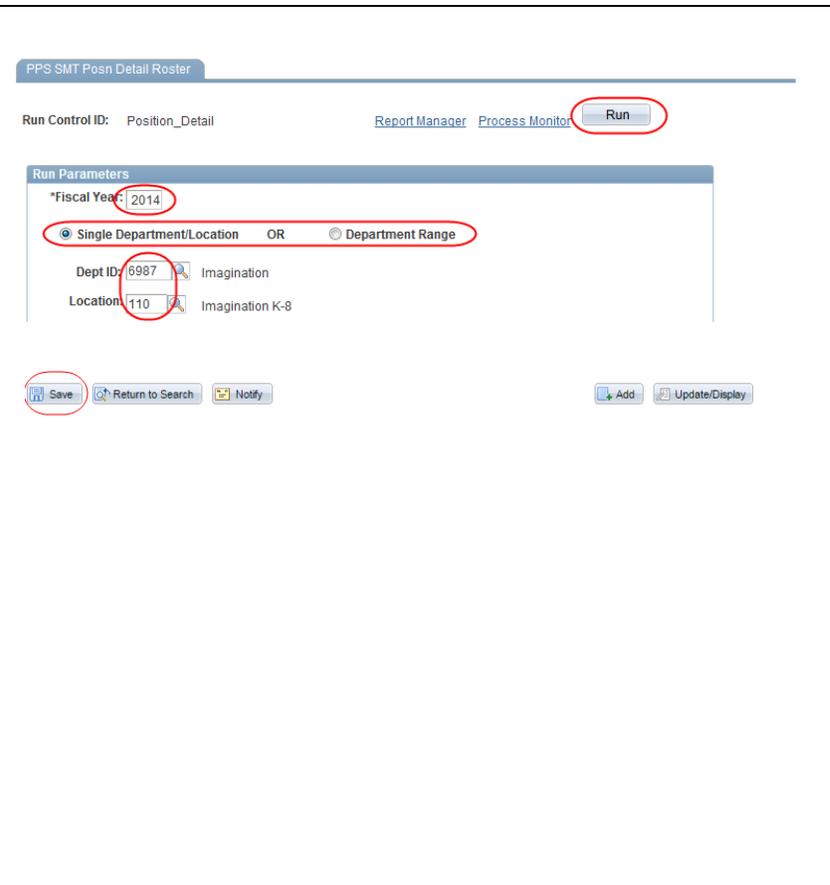
NOTE: You will need to run this report separately for your SPED, ESL & Immersion employees by selecting those department numbers (5414, 5408, and 5454 respectively) and your location.

Step 9: **Enter the Department and Location Code or the Department Codes for the range.**

NOTE: If necessary, you can use the  buttons to look up the Department and Location Codes.

Step 10: **Click Save** to save these parameters with the Run Control ID.

Step 11: **Click Run** to start the report.



PPS SMT Posn Detail Roster

Run Control ID: Position_Detail Report Manager Process Monitor **Run**

Run Parameters

*Fiscal Year: 2014

Single Department/Location OR Department Range

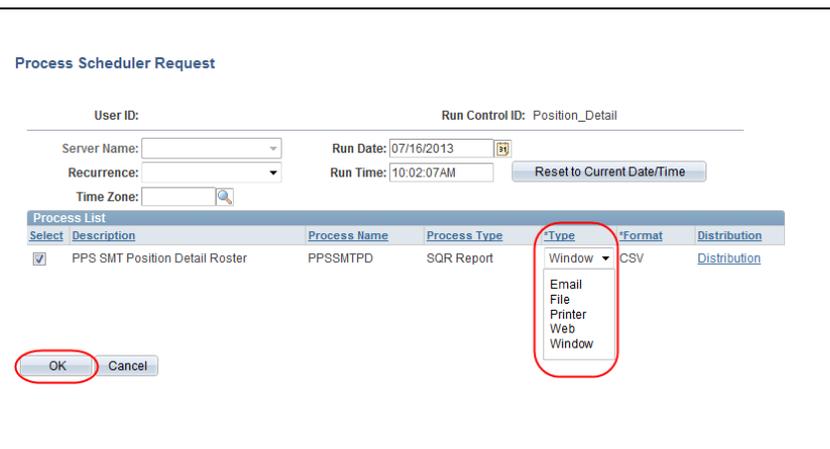
Dept ID: 6987 Imagination

Location: 110 Imagination K-8

Save Return to Search Notify Add Update/Display

Step 12: **Select Window** for the report output type. The report will only run to CSV format.

Step 13: **Click OK** to run the report.



Process Scheduler Request

User ID: _____ Run Control ID: Position_Detail

Server Name: _____ Run Date: 07/16/2013 

Recurrence: _____ Run Time: 10:02:07AM **Reset to Current Date/Time**

Time Zone: _____ 

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PPS SMT Position Detail Roster	PPSSMTPD	SQR Report	Window	CSV	Distribution

OK Cancel

<p>Step 14: View the report status messages that appear in a new window.</p> <p>NOTE: If the server is very busy, the report may take longer to run.</p>	<p>Queued</p> <p>Process Name: <input type="text" value="PPSSMTPD"/> <input type="text" value="PPS SMT Position Detail Roster"/></p> <p>Process Instance: <input type="text" value="332628"/> Process Type: <input type="text" value="SQR Report"/></p>
	<p>Success</p> <p>Process Name: <input type="text" value="PPSSMTPD"/> <input type="text" value="PPS SMT Position Detail Roster"/></p> <p>Process Instance: <input type="text" value="332628"/> Process Type: <input type="text" value="SQR Report"/></p>
	<p>Success Preparing output for viewing</p> <p>Process Name: <input type="text" value="PPSSMTPD"/> <input type="text" value="PPS SMT Position Detail Roster"/></p> <p>Process Instance: <input type="text" value="332628"/> Process Type: <input type="text" value="SQR Report"/></p>

Step 15: The SMT Position Detail Roster will open in the new window. Information about the report run is at the top of the page, followed by rows of information for each employee, with limited terms showing at the bottom of the employee list.

Step 16: Press F12 to save as an Excel document.

	A	B	C	D	E	F	G	H	I	J	K
1	PPS SMT Position Detail Roster										
2	Fiscal Year:	2014									
3	Department:	6987 Imagination									
4	Location:	110 Imagination K-8									
5	Run Date:	7/16/2013									
6	Run Time:	10:02:07									
7	Dept	Loc	Name	Empl ID	Rec #	Empl Stat	Posn FTE	Position	Assignmeade	From	Grade To
8	6987	110	Angelou,M	3249	0	A	1	1269 Teacher-k		5	5
9	6987	110	Baez,Joar	21138	0	A	1	6999 Teacher-k		4	4
10	6987	110	Banderas	16830	0	A	1	382 Teacher-k		4	4
11	6987	110	Charles,R	17595	0	A	1	6998 Teacher-k		1	1
12	6987	110	Christie,A	5439	0	A	1	7000 Teacher-k		2	2
13	6987	110	Dali,Salva	21101	0	A	1	10948 Teacher-k		3	3
14	6987	110	Einstein,J	17548	0	A	1	14011 Teacher-k		3	8
15	6987	110	Fernande	3610	0	A	1	1169 Teacher-k		2	2
16	6987	110	Garland,J	4095	0	A	1	14865 Counselo		K	8
17	6987	110	Goodall,J	1347	0	A	0.5	7537 Teacher-k		K	8
18	6987	110	Griffith,Ic	10767	0	A	1	7672 Teacher-k		1	1
19	6987	110	Hayek,Sal	18021	0	A	1	2911 Teacher-k		5	5
20	6987	110	Kahlo,Fric	20494	0	A	1	6997 Teacher-k		3	3
21	6987	110	Keller,He	10807	0	A	1	2694 Teacher-k		K	K
22	6987	110	Kennedy,	15687	0	A	1	4269 Principal's		Secretary-K8	
23	6987	110	Lindbergh	12724	0	A	0.375	10949 Teacher-k		6	8
24	6987	110	Lindbergh	12724	0	A	0.375	14302 Media Sp		K	8
25	6987	110	Lindbergh	12724	1	L	0.25	14302 Media Sp		K	8
26	6987	110	Oakley,Ar	19950	0	A	1	2185 Teacher-k		K	K
27	6987	110	Picasso,P	21107	0	A	0.5	7001 Teacher-C		K	5
28	6987	110	Rivera,Div	20392	0	A	1	6995 Teacher-k		K	K
29	6987	110	Roosevel	6461	0	A	1	5201 Teacher-k		3	3
30	6987	110	Shakespe	7738	1	L	0.25	4914 Teacher-k		K	8
31	6987	110	Shakespe	7738	0	A	0.75	4914 Teacher-k		K	8
32	6987	110	Torres,Da	16263	0	A	0.5	6625 Library Assistant			
33	6987	110	Winfrey,C	11753	0	A	1	7308 Teacher-k		1	1
34	6987	110			0	A	1	3668 Principal-K8			
35											
36											
37	Limited Term Positions										
38	6987	110	Rogers,Fr	5698	0	A	0	14525 LT Storytime Presenter			
39	6987	110	Pastorius	14697	0	A	0	15555 LT Tutor-Music			
40											

The report is complete!

You have now run a PPS SMT Position Detail Roster report for your department and location.

Scenarios

Retirements and Resignations

When an employee elects to end their employment, they must complete and submit the PPS Employee Resignation form. On the SMT, you will use the **End Employment** action.

This action zeroes out the employee's FTE and automatically creates a vacancy at your department / location for the position the employee is leaving. You will also need to manage the vacancy.

Step 1: Use the **End Employment** action. This action should be used to indicate resignation, retirement, termination, or break in service from the District – voluntary or involuntary. If an employee is changing SMT department/location combinations, please see the [Transfer Out scenario](#) instead.

- Please reference the [End Employment action](#) section of this User Guide for step-by-step instructions.

Step 2: You will also need to manage the vacancy that is automatically created. Please reference the [Manage Vacancies scenario](#) to view available options for this situation.

Unassignments

A building or program may need to unassign an employee if there is a program change and/or a reduction in allocated FTE that makes it necessary. Please make sure you verify the contractual requirements before you unassign an employee (reference the *Frequently Asked Questions* in the Staffing Handbook and/or the specific union contract). Please contact your staffing team member with any questions.

If an employee is being fully or partially unassigned from your department / location, you will use the SMT Unassignment action.

Step 1: Use the Unassignment Action

- Please reference the [Unassignment action](#) section of this User Guide for step-by-step instructions.

NOTE: No vacancy is created for this position.

Step 2: Complete an unassignment notice and give to the affected employee. Send a copy of the unassignment notice to Human Resources.

- Unassignment notices are available on the HR Website under Staffing Handbook or by calling your Staffing Team member.

Manage Leaves of Absence

One of your employees is requesting a Leave of Absence (LOA). Have the employee send the Leave Request form and supporting documentation to the Leave Specialist in Human Resources. Once the LOA has been **approved or denied**, you will receive an e-mail from the Leave Specialist.

Please remember the following Leave of Absence guidelines:

- If the Leave is for a classroom teacher AND under 30 calendar days, teacher/site should request a Substitute.
- If the Leave is for a classroom teacher over 30 calendar days but less than 60 calendar days, teacher/site should request a Substitute who is HQ in appropriate license area.
- If the Leave is for a classroom teacher or certified employee AND over 60 calendar days, teacher/site should hire a Temporary Teacher.
- Contact your Staffing Team member regarding classified employees.
- Never enter a denied Leave of Absence into the SMT.

Step 1: Enter a Leave of Absence action row for the employee. All long-term Leaves of Absence, partial and full, must be entered into the SMT.

- **NOTE:** The system will automatically create a "Leave Backfill" position in the vacancy section for the amount of FTE the employee is on an LOA. The backfill will mirror the position number, funding, and description of the EE who is taking the LOA.
- Please reference the [Leave of Absence action](#) section of this User Guide for step-by-step instructions.

Step 2: Manage the Vacancy. See the [Manage the Vacancy scenario](#) to view options for the vacancy created for the Leave Backfill.

- Leave Backfill positions are automatically created in Recruit (post) status. No action is needed on your part if you wish to post this vacancy.
- Enter any applicable notes on the notepad, including the dates you would like the vacancy posted (contractual requirements must apply)

Step 3: When the Leave has ended. Use the [Return from Leave action](#) if the employee is returning or the [End Employment action](#) if the employee is not returning at the end of their Leave of Absence.

- Be sure to take action on the employee who is backfilling the Leave vacancy, by [Changing an Employee's Assignment](#) or [Ending Employment](#). This way, FTE will not double-count for both the employee returning to a position and the backfilled position.
- Once the filled Leave Backfill position is vacated again, you must add the [Inactivate Position action](#). Please reference the Inactivate Position action section of this User Guide for step-by-step instructions.

NOTE: If you have employees who are currently on a **Leave of Absence** they will have been returned from Leave by your HR Staffing Team member just prior to the new SMT becoming available to you for editing.

- If the employee will remain in full or partial Leave status for the new year, use the [Leave of Absence action](#) to place them on leave and be sure their former position (or part of it) exists either as a vacancy or has been filled by a temporary employee.

Transfer Out of Department and Location

If an employee is transferring out of your department / location SMT combination, you will use the SMT **Transfer Out** action.

This action zeroes out the employee's FTE and automatically creates a vacancy at your department / location for the position the employee is leaving. You will also need to manage this vacancy.

Step 1: Complete the **Transfer Out** action.

- The "from" department / location will show an FTE of 0 for the employee. This employee's FTE will no longer count toward this location's FTE balance.
- Please reference the [Transfer Out action](#) section of this User Guide for step-by-step instructions.

Step 2: You will also need to [Manage the Vacancy](#) that is automatically created. Please reference the Manage Vacancies scenario to view available options for this situation.

FTE Change

If the FTE for an employee or vacant position is changing, you will use the SMT [Modify Position](#) action.

Please reference the Modify Position action section of this User Guide for step-by-step instructions.

NOTE: The Modify Position action is NOT to be used in place of Unassignment.

Please see the [Unassignment scenario](#) if an employee is being unassigned.

Work Days Change

If the number of work days per year is changing for an employee or vacant position, you will use the SMT [Modify Position action](#).

Please reference the Modify Position action section of this User Guide for step-by-step instructions.

Funding Change

If the funding for an employee or vacant position is changing, you will use the SMT **Modify Position** action.

A change in the funding source, program, class, fund, or project/grant is considered a funding change and will require the [Modify Position action](#).

Please reference the Modify Position action section of this User Guide for step-by-step instructions.

NOTE: Position to be funded by another department

If another department / location SMT combination is picking up all of an employee's funding, you will use the action **Transfer Out** instead of **Modify Position**. Please see the [Transfer Out of Department and Location scenario](#).

NOTE: Position to be funded by multiple departments

If another department / location SMT combination is picking up only a portion of the employee's funding, you will use Modify Position to decrease the amount of FTE your department is funding. See the [Modify Position action](#) for more information. Please enter a comment in the Notes that indicates the department and the amount of FTE it will fund. Fill a new or vacant position for that amount of FTE in the appropriate department.

Employee Assignment Change

If an employee's assignment is being modified, or if an employee is changing assignments in your building, you will use the **Modify Position** or **Transfer Within** actions.

The **Modify Position** action is used to correctly reflect the subject(s) taught, or to make a correction to a position title. The **Modify Position** action does not create a vacancy and may be used in the Filled or Vacant Positions Sections.

The **Transfer Within** action is used when an employee will be filling a position previously occupied by another employee on the same SMT department / location combination, or filling a new position. The **Transfer Within** action zeroes out the employee's previous FTE.

Note: It also automatically creates a vacancy for the position the employee is leaving at your department/location. You can read about options for this vacant position in the **Manage Vacancies** scenario.

Actions Required:

Option 1: Change the Position Title

- Example: Teacher-HS Chemistry/Integ Sci to Teacher-HS Chemistry/Physics
- Please use the [Modify Position action](#) section of this User Guide for step-by-step instructions.
 - **Note:** In some cases, changing a title will result in a Funding/Chartfield change.

Option 2: Transfer an employee into a vacant position from within your Department/Location

- Add a [Transfer Within action](#) for the employee you want to move into the vacant or new position. Please reference the Transfer Within action section of this User Guide for step-by-step instructions.
- Add a [Fill Vacancy action](#) to the specified vacant position on the View/Change page for this employee. Please reference the Fill Vacancy action section of this User Guide for step-by-step instructions.
- [Manage the Transfer Vacancy](#). The system generates a vacancy for the employee's previous position (See **Manage Vacancy** scenario).

Location Change

Use this action only if your Department has multiple Locations where employees could be assigned (Special Education, ESL, some schools and some Central Office Departments). This action can only be used if the Department number will remain the same for the “from” and “to” locations.

If you have an Employee who will perform the same assignment in a different location from where s/he currently works, you will use the **Location Change** action. You may also move existing Vacant positions from one location to another.

- The [Location Change action](#) is the only necessary action for this scenario. Please reference the Location Change action section of this User Guide for step-by-step instructions.

NOTE: The “from” location will show an FTE of 0 for the employee. This employee’s FTE will no longer count toward this location’s FTE balance.

The system will automatically generate a Location Change row for this employee’s new record at the “to” location. The employee’s working FTE will be now be counted towards this location’s FTE balance.

A Note will automatically generate indicating the “from” and “to” location information.

Manage Vacancies

Your SMT may have a vacancy in the Vacant Positions section resulting from a Request for New Position, an action taken in the Filled Positions section (for example, Resignation or Leave of Absence), or a previously existing vacancy. Your program needs and the allocated FTE/grant funding will determine what will happen with the vacancy. Use the options below to help you determine how to manage your vacancies to meet your staffing needs.

Decision: Will you retain the position?

No - Enter action of [Inactivate Position](#). FTE will zero out. Please reference the Inactivate Position action section of this User Guide for step-by-step instructions.

Yes - Go to options below.

- Reminder: Please ensure that employee being placed in the position is appropriately licensed and NCLB Highly Qualified

Option 1: Recruit for it as-is

Vacancy status of Recruit tells HR that you intend to keep this position in your program, and you want HR to recruit for the position (via posting, reviewing applicant pool, etc). If you want HR to recruit for the position as-is, no further action is necessary. Recruit is the default Vacancy Status.

Option 2: You want to **Modify the Position** by either changing the Title, FTE, Funding, or Work Days.

Please reference the [Modify Position](#) action for step-by-step instructions.

Option 3: You want to **Fill the Vacancy** as it exists

Please reference the [Fill Vacancy](#) action section of this User Guide for step-by-step instructions.

- If the employee is already working in your department and location, you will need to move the employee out of his/her current position in the Filled Positions section with a Transfer Within action.
- If the employee is from another department or not a PPS employee, complete the Recommendation to Fill form and send to HR.

Request New Position

If allocated FTE or other approved funding is available for an additional position(s) at your department/location, you will use the SMT to **Request a New Position**. To Request a New Limited Term Position, please see the **Request New Limited Term Position** scenario.

- To request a new position, use the button available at the bottom of the Staffing Summary page. View the [Request a New Position action](#) for more details.
 - This new vacancy row will be visible in the Vacant Positions section of the Staffing Summary Page, with the Assignment and FTE displayed, the Vacancy Status set to Recruit, and a system-generated position number displayed. The funding will most often default to General Fund unless you select a different funding source.
- You will then need to [Manage the Vacancy](#) once it has been requested. Please reference the Manage Vacancies scenario to view available options for this situation.

Request New Limited Term Position

If you will be hiring a limited term employee, you will use the SMT to **Request a New Limited Term Position**.

- To request a new limited term position, use the button available at the bottom of the Limited Term Staffing Summary page. View the [Request New Limited Term Position action](#) for more details.

Balancing FTE

The Balance columns on the Allocations and Balances page indicate whether the SMT is balanced in each of the funding groups. Additionally, the General Fund and Title I balances are displayed at the top of each page.

If a funding group is balanced, the Balance column will show 0.00 FTE. If the filled and vacant positions together total less than the allocation, the remaining FTE will display as a positive value in the Balance column. If the Used Filled plus Used Vacant FTE totals more than the allocation, the overage will display as a negative value in the Balance column. Overages display as red fields.

Please note the following exceptions to balancing within specific funding groups.

- If a General Fund Kindergarten or Counselor allocation has been provided, that FTE must be used in order to Submit your SMT. If you will not use the full allocation, please contact your Budget Analyst for an adjustment. You may choose to use more FTE than allocated in these funding groups.
- Once the General Fund Kindergarten and Counselor requirements are met and administrative FTE is used appropriately, the General Fund need only balance by overall category.
- If a General Fund Arts allocation has been provided, the FTE must be used and balance at 0.00.
- Special Ed and ESL funding groups must balance at 0.00.
- The Foundation funding group will not receive allocations. Please work with your Grant Accountant to ensure that funding is available and approved.
- The "Other" funding group will not receive allocations and will always display as an overage. Please work with your Grant Accountant to ensure that funding is available and approved.
- Be sure to follow the requirements for your department regarding any specific allocations.

When an FTE-based Funding Source has a negative balance overall, vacancies using this funding cannot be filled. When an attempt is made to Fill Vacancy or Fill Sub, the user or approver will be unable to Save and must cancel the action. A message informs the user that they have exceeded their FTE allocation and need to contact their Budget Analyst. Please contact the Budget Analyst and, if appropriate, Grant Accountant for assistance.

Listed below are options for bringing a funding group into balance when it's over its allocation.

Option 1: Change funding for existing employees and vacancies to other available and appropriate sources. Please see the [Modify Position](#) action for details on how to change funding.

Option 2: As the program allows, inactivate or decrease FTE for vacant positions. Please see the [Manage Vacancies scenario](#) for details on inactivating a vacancy and the [Modify Position](#) action for details on how to decrease FTE.

Option 3: Decrease FTE for existing employees who had temporary increases for the previous school year.

Option 4: After all other options have been exhausted, you may need to ask staff in your building if they are willing to *voluntarily* unassign themselves (the staff member's position would not be saved) or request an unpaid leave of absence to help balance FTE at the building. If staff members are not able to accommodate the requests you will need to unassign an employee (either partially or fully).

For unpaid Leaves of Absence, see the [Manage Leaves of Absence scenario](#). For voluntary or involuntary unassignments, verify contractual requirements and see the [Unassignment scenario](#).

Option 5: If none of the above options have resolved your balance issue, please contact your Regional Administrator or Program/Department Director.

Actions

End Employment

The steps below demonstrate how to **End Employment**.

The Employee Resignation form is required for ending employment.

Step 1: Enter the Effective Date the employment will end.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select the End Employment action.

Step 3: Read the messages regarding Unassignment and Vacancies.

Step 4: Click OK to continue the End Employment process.

Fill Vacancy

The steps below demonstrate how to **Fill a Vacancy**. You can use this action with any type of vacancy, including Leave Backfills and Limited Terms. Leave Backfills are generally filled with temporary hires.

The Recommendation to Fill form is required when filling a vacancy with an external candidate.

Step 1: Enter the Effective Date the position will be filled.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select the Fill Vacancy action. The overall funding source for the vacant position must balance or be positive in order to Fill the position.

Step 3: Enter the Name and Employee ID of the person you want to Fill the Vacancy.

Step 4: Click OK to save the changes and return to the Staffing Summary page.

The screenshot shows the 'ViewChange' form with the following details:

- Department: 6987 Imagination
- Location: 110 Imagination K-8
- Fiscal Year: 2014
- General Fund Balance: 0.500
- Title I Balance: 0.090
- Title IC Balance: 0.000

The main table shows two rows:

	*Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assig
1	07/01/2013	1	Vacancy			0	00006998	Teach Span
2	07/01/2013	2	Fill Vacancy	Mouse, Mickey	029999	0	00006998	Teach Span

A dropdown menu is open for the 'Fill Vacancy' action, showing options: Fill Vacancy, Inactivate Position, Location Change, and Modify Position. The 'OK' button is highlighted.

Step 5: View the row in the Vacant Positions section.

Note that the  next to the row has changed to a , indicating a change and that the employee's name and ID are now displayed.

The screenshot shows the 'Staffing Summary' page with the following details:

- Department: 6987 Imagination
- Location: 110 Imagination K-8
- Fiscal Year: 2014
- General Fund Balance: 0.500
- Title I Balance: 0.090
- Title IC Balance: 0.000
- Status: Open

The 'Filled Positions' section is collapsed. The 'Vacant Positions' table is expanded and shows the following data:

View/Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
▲	Teacher-K8 Gr 5	Inactive		07/01/2013	00002453			0		
▲	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
▲	Teacher-K8 LA/Reading	Inactive		06/30/2014	00004914			0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech			06/30/2014	00005736	Lindbergh, Charles	017548	0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech	Inactive		06/30/2014	00005736			0		
▲	Teacher-K8 Gr 1 Spanish Imm	Fill	1.000	07/01/2013	00006998	Mouse, Mickey	029999	0	Active	
▲	School Secretary-K8	Recruit	1.000	07/01/2013	00007022			0		
▲	Assistant Principal-K8	Recruit	1.000	07/01/2013	00011010			0		

The action is complete!

You have now filled a vacancy.

Inactivate Position

The steps below demonstrate how to **Inactivate a Position**.

Step 1: Enter the Effective Date for the position to be inactivated.

NOTE: You must enter the Effective Date before you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select the Inactivate Position action.

NOTE: You cannot edit the row after selecting Inactivate Position.

Step 3: Click OK to save the changes and return to the Staffing Summary page.

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance **0.500** Actions Glossary
 Employee Title I Balance **0.090**
 Title IC Balance **0.000**

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status
07/01/2013	1	Vacancy			0	00011010	Assistant Principal-K8	Recruit
07/01/2013	2	Inactivate Position			0	00011010	Assistant Principal-K8	Inactive

Fill Vacancy
 Inactivate Position
 Location Change
 Modify Position

OK Cancel Apply

Step 4: Note that the  next to the row has changed to a , indicating a change.

The vacancy status has changed from "Recruit" to "Inactivate" and the Total FTE is now blank.

NOTE: Inactivated positions will be reflected immediately in your General Fund Balance and Title I balances at the top of the page.

Staffing Summary Limited Term Staffing Summary Funding Summary Allocations & Balances

Department 6987 Imagination Fiscal Year 2014 Approve & Submit SMT Help
 Location 110 Imagination K-8 General Fund Balance **1.500** Open/Edit Employee Lookup
 Status Open Title I Balance **0.090** Run SMT Roster
 Title IC Balance **0.000**

↓ Filled Positions

↑ Vacant Positions

View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
▲	Teacher-K8 Gr 5	Inactive		07/01/2013	00002453			0		
▲	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
▲	Teacher-K8 LA/Reading	Inactive		06/30/2014	00004914			0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech			06/30/2014	00005736	Lindbergh, Charles	017548	0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech	Inactive		06/30/2014	00005736			0		
▲	Teacher-K8 Gr 1 Spanish Imm	Fill	1.000	07/01/2013	00006998	Mouse, Mickey	029999	0	Active	
▲	School Secretary-K8	Recruit	1.000	07/01/2013	00007022			0		
▼	Assistant Principal-K8	Inactive		07/01/2013	00011010			0		
▲	Media Specialist-K8	Inactive		07/01/2013	00014302			0		
▲	Teacher-K8 Gr 6 Spanish Imm	Fill	1.000	08/28/2013	00015604	Parks Rosa	016085	0	Active	

The action is complete!

You have now inactivated a position.

Leave of Absence

The steps below demonstrate how to create a Leave of Absence for an employee. You can **create a partial Leave of Absence or full Leave of Absence** for an employee. Full or partial Leaves of Absence must be entered into the SMT.

An employee MUST send the Leave Request and supporting documentation to the Leave Specialist in Human Resources. Once Human Resources has approved the leave, you will receive an email from the Leave Specialist.

You must perform the Return from Leave of Absence action when the employee's Leave of Absence has ended.

Step 1: Enter the Effective Date for the Leave of Absence.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Leave of Absence from the Action list.

View/Change

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance 1.500 Actions Glossary
 Employee 016830 Banderas, Antonio Title I Balance 0.090
 Title IC Balance 0.000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title
07/01/2013	1	Baseline	Banderas, Antonio	016830	0	00000382	Teacher-K8 Gr 4 Spanish Imm
07/01/2013		Leave of Absence			0		

End Employment
 Leave of Absence
 Location Change
 Modify Position
 Transfer Out
 Transfer Within
 Unassignment

OK Cancel Apply

Step 3: Read the message information about creating a vacancy.

Click OK to continue entering a Leave of Absence.

Message

This action will create a vacancy. Click OK to continue or Cancel to re-enter a new action. (20000,36)

OK Cancel

Step 4: Read the pop-up message information about entering FTE for a Leave of Absence.

Click OK to continue entering a Leave of Absence.

Message

Enter the amount of FTE the Employee will continue to work, or 0 if the Leave is full. (20000,40)

LOA paperwork submission is required.

OK

Step 5: Enter the new FTE the employee will work.

If the employee is going on a partial Leave of Absence (e.g. 0.50 employee on site; 0.50 Leave of Absence), enter the amount of FTE the employee will continue to work.

If the employee is going on a full-time Leave of Absence enter 0.00 for the FTE.

Step 6: Click OK to save the changes and return to the Staffing Summary page.

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance 1.500 Actions Glossary
 Employee 016830 Banderas, Antonio Title I Balance 0.090 Title IC Balance 0.000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status	Empl Status	Dept ID	Loc	Work Days	Post FTE	Position Details
07/01/2013	1	Baseline	Banderas, Antonio	016830	0	00000382	Teacher-K8 Gr 4 Spanish Imm		Active	6987	110	190	1.000	Position Details
07/01/2013	2	Leave of Absence	Banderas, Antonio	016830	0	00000382	Teacher-K8 Gr 4 Spanish Imm	Fill P2 EX	Active	6987	110	190	0.000	Position Details

OK Cancel Apply

NOTE: After saving, you will notice that the Action automatically changes from “Leave of Absence” to “LOA - Working FTE.”

NOTE: If you click Cancel at this point, the Leave of Absence Row will not be saved; however, the vacancy will have already been created and you will need to delete the vacancy.

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance 1.500 Actions Glossary
 Employee 016830 Banderas, Antonio Title I Balance 0.090 Title IC Balance 0.000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status	Empl Status	Dept ID	Loc	Work Days	Post FTE	Position Details
07/01/2013	1	Baseline	Banderas, Antonio	016830	0	00000382	Teach Spani							
07/01/2013	2	LOA - Working FTE	Banderas, Antonio	016830	0	00000382	Teach							

OK Cancel Apply

Step 7: The employee will now have two rows on the Staffing Summary page.

The first row reflects the amount of FTE the employee will work (from 0.000 - 0.999), and displays a status of "Active." The action name for this row is automatically updated to "LOA – Working FTE" when the FTE changes are saved.

A second row will display the amount of Leave FTE (.001 - 1.000) the employee is taking, with an employee status of "Leave." The action is called "Leave of Absence."

Note that the ▲s next to both rows are filled, indicating a change.

Step 8: In the Vacancy section, note the new "Leave Backfill" vacancy created as a result of the Leave of Absence action. It will have the same position number, funding, and description as that of the employee who is taking the Leave of Absence.

NOTE: Vacancies created by a Leave of Absence default to a Vacancy Status of Recruit. See the Fill Vacancy action (page 40) on filling the Leave Backfill position.

NOTE: A note attached to the vacancy will automatically be created and indicate the reason for the vacancy. For example, "Vacancy due to the Leave of Absence of Mouse,Mickey." The note will be added under the name of the person who performed the action.

Staffing Summary		Limited Term Staffing Summary		Funding Summary		Allocations & Balances		
Department	6987 Imagination	Fiscal Year	2014		Approve & Submit			SMT Help
Location	110 Imagination K-8	General Fund Balance	1.500		Open/Edit			Employee Lookup
Status	Open	Title I Balance	0.090		Run SMT Roster			
		Title IC Balance	0.000					

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
▲	Angelou,Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
▲	Baez,Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
▲	Banderas,Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
▲	Banderas,Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
▲	Charles,Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006008	017505	0

View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
▲	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	00000382			0		
▲	Teacher-K8 Gr 5	Inactive		07/01/2013	00002453			0		
▲	Principals-K8	Recruit	1.000	07/01/2013	000013668			0		

View/Change

Department	6987 Imagination	Notes	Fiscal Year	2014	SMT Help
Location	110 Imagination K-8		General Fund Balance	1.500	Actions Glossary
Employee			Title I Balance	0.090	
			Title IC Balance	0.000	

Personalize Find	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status
1	07/01/2013	1	Leave BackFill			0	00000382	Teacher-K8 Gr 4 Spanish Imm	Recruit

OK Cancel Apply

The action is complete!

You have entered a Leave of Absence for an employee.

Location Change

If you have an Employee who will perform the same assignment in a different location from where s/he currently works and the Department number for which they work is not changing, you will use the SMT **Location Change** action.

Use this action only if your Department has multiple Locations where employees could be assigned (Special Education, ESL, some schools and some Central Office Departments).

You may also move existing Vacant positions from one location to another.

Step 1: Enter the Effective Date for the Location Change.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Location Change from the Action list.

The screenshot shows the 'ViewChange' interface. At the top, there are fields for Department (6987 Imagination), Location (110 Imagination K-8), Employee (001347 Goodall, Jane), Fiscal Year (2014), and balances (General Fund Balance 1.500, Title I Balance 0.090, Title IC Balance 0.000). Below this is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, and Assignment Title. Row 1 shows '07/01/2013', '1', 'Baseline', 'Goodall, Jane', '001347', '0', '00007537', and 'Teacher-K8 PE'. Row 2 shows '07/01/2013', '2', 'Location Change', and empty fields for Name, Empl ID, Rcd #, and Position #. A dropdown menu is open below the table, listing actions: End Employment, Leave of Absence, Location Change, Modify Position, Transfer Out, Transfer Within, and Unassignment. The 'Location Change' option is selected. Buttons for 'OK', 'Cancel', and 'Apply' are at the bottom.

Step 3: Enter the new Location ID for the Employee.

Step 4: Click OK to save the changes and return to the Staffing Summary page.

NOTE: When you click Apply or OK, you will receive a message that tells you the change you requested took effect. Ex: "Location change has occurred. FTE at this location is now 0.000."

The screenshot shows the 'ViewChange' interface after the location change. The 'Location' field is now '6987 Imagination'. The table below shows two rows: Row 1 is the baseline assignment (07/01/2013, 1, Baseline, Goodall, Jane, 001347, 0, 00007537, Teacher-K8 PE, Active, 6987, 110, 190, 0.500). Row 2 is the new location change (07/01/2013, 2, Location Change, Goodall, Jane, 001347, 0, 00007537, Teacher-K8 PE, Fill P2 EX, 6987, 110, 190, 0.500). The 'OK' button is circled in red. Buttons for 'OK', 'Cancel', and 'Apply' are at the bottom.

Step 5: Note the new FTE balances at the top of the page. The FTE allocation, if one existed, moves with the position to its new location.

Note that the  next to the row has changed to a , indicating a change.

The changed row will have a blank FTE for the original location.

Step 6: Click on the  in the changed row to see the system-generated notes about the Location Change.

Staffing Summary | Limited Term Staffing Summary | Funding Summary | Allocations & Balances

Department 6987 Imagination Fiscal Year 2014
 Location 110 Imagination K-8 General Fund Balance 1.500
 Status Open Title I Balance 0.090
 Title IC Balance 0.000

Approve & Submit SMT Help
 Open Edit Employee Lookup
 Run SMT Roster

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
▲	Charles, Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
▲	Christie, Agatha	Teacher-K8 Gr 2	1.000	Active	06/30/2014		00007000	005439	0
▲	Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
▲	Dali, Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010948	021101	0
▲	Earheart, Amelia	Assistant Principal-K8			07/01/2013		00011010	015845	0
▲	Einstein, Alfred	Teacher-K8 Gr 3-8 Science/Tech	1.000	Active	06/30/2014		00014011	017548	0
▲	Fernandez, Rudy	Teacher-K8 Gr 2 Spanish Imm	1.000	Active	07/01/2013		00001169	003610	0
▲	Ford, Harrison	Teacher-K8 Gr K-5 Art			06/30/2014		00006996	019753	0
▲	Garland, Judy	Counselor-K8	1.000	Active	07/01/2013		00014855	004095	0
▲	Goodall, Jane	Teacher-K8 PE		Active	07/01/2013		00007537	001347	0
▲	Griffith, Joan	Teacher-K8 Gr 1	1.000	Active	06/30/2014		00007672	010767	0

Step 7: View the note about the Location Change. Add a new note if desired.

Step 8: Click OK to save the changes and return to the Staffing Summary page.

NOTE: To verify the location change, go to the new Department / Location combination.

SMT Notes

Department 6987 Imagination Fiscal Year 2014 Section: F
 Location 110 Imagination K-8
 Employee 001347 Goodall, Jane

SMT Notes Find | View All First 1 of 1 Last

DateTime: 07/16/2013 11:34:55.000000AM Note Text: Dept 6987 Location change from 110-Imagination K-8 to 100-BESC

User ID:
 Name:

Add a New Note

OK Cancel Apply

The action is complete!

You have now moved an employee or vacant position to a different location within the same department.

Modify Position

You can use the **Modify Position** action to reflect the following changes in an employee's assignment: **Work Days, FTE, Position Title and Attributes, or Funding.**

Step 1: Enter the Effective Date of the Modify Position.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Modify Position from the Action List.

The screenshot shows the 'ViewChange' interface. At the top, there are summary fields: Department 6987 Imagination, Location 110 Imagination K-8, Employee 005439 Christie,Agatha, Fiscal Year 2014, General Fund Balance 1.500, Title I Balance 0.090, and Title IC Balance 0.000. Below this is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, and Assignment Title. The first row shows 07/01/2013, 1, Baseline, Christie,Agatha, 005439, 0, 00007000, and Teacher-K8 Gr 1-2. The second row shows 07/01/2013, 2, and a dropdown menu is open with 'Modify Position' selected. Other options in the dropdown include End Employment, Leave of Absence, Location Change, Modify Position, Transfer Out, Transfer Within, and Unassignment. Buttons for OK, Cancel, and Apply are at the bottom.

Step 3: If changing the Work Days, enter the new Work Days for the employee.

NOTE: You can click on the to look up Work Days.

Step 4: If changing the FTE, enter the new FTE for the employee.

Step 5: If changing Work Days and/or FTE only, click OK to return to the Staffing Summary page.

Step 6: If changing Position Attributes or Funding, click on Position Details.

The screenshot shows the staffing summary table. At the top, there are summary fields: Fiscal Year 2014, General Fund Balance 1.500, Title I Balance 0.090, and Title IC Balance 0.000. Below this is a table with columns: Name, Empl ID, Rcd #, Position #, Assignment Title, Vacancy Status, Empl Status, Dept ID, Loc, Work Days, Posn FTE, and Position Details. The first row shows Christie,Agatha, 005439, 0, 00007000, Teacher-K8 Gr 1-2, Active, 6987, 110, 190, 1.000, and Position Details. The second row shows Christie,Agatha, 005439, 0, 00007000, Teacher-K8 Gr 1-2, Active, 6987, 110, 190, 1.000, and Position Details. The '190' in the Work Days column and '1.000' in the Posn FTE column are circled in red. A magnifying glass icon is next to the '190'.

BEFORE POSITION DETAIL ENTRY, PLEASE NOTE:

Please make changes in the correct order, beginning with the Proposed Position Information, then moving to the Proposed Funding Distribution. Click Apply, then check the Chartfield Information and make changes if needed.

Step 7: **If changing the assignment, review the Proposed Position Information. If making changes, edit the existing row(s) or use the   buttons to add or delete assignment rows as needed.**

NOTE: If you delete an assignment row, click Apply prior to leaving the page.

NOTE: To change an assignment you will modify the position attributes such as Position Group, Position Type, etc.

NOTE: You can type the first letter of the word you're looking for to narrow the list of choices.

NOTE: If the assignment is IB or AP, check the appropriate box.

Step 8: **Enter the Percent of Time the employee is working in each portion of their assignment. This should total 100.**

Position Details

Department: 6987 Imagination Notes: Fiscal Year: 2014
 Location: 110 Imagination K-8 General Fund Balance: 1,500
 Employee: 005439 Christie Agatha Title I Balance: 0.090
 Position: 00007000 Teacher-K8 AdvVocal Music Title I C Balance: 0.000
 Effective Dt: 07/01/2013 Seq: 2 Action: Modify Position Post FTE: 1.000
 Loc Type: KB Grp: Sch KB Low Gr: *K High Gr: 08 Action Flag: Initial Add

Proposed Position Information

Position Group	Position Type	Lowest Grade	Highest Grade	General Subject	Specific Subject	IB	AP	Percent of Time
Licensed	Teacher	01	02	Classroom/Self-Contained		<input type="checkbox"/>	<input type="checkbox"/>	100 %
Licensed	Teacher	*K	08	Art		<input type="checkbox"/>	<input type="checkbox"/>	60 %
Licensed	Teacher	*K	08	Music	Vocal Music	<input type="checkbox"/>	<input type="checkbox"/>	40 %

Assignment Title: Teacher-K8 AdvVocal Music Total Days: 190 Total: 100 %

Proposed Funding Distribution

Funding Source	Project/Grant	Post FTE	Grant End Date
General Fund		1.000	

Step 9: **Click on Generate System Title or Click on Enter Custom Title.**

NOTE: Generate System Title will use a system format for the title. The new Position Title will show in the blue box. If this does not accurately describe the assignment you may Enter Custom Title (the blue box will become an editable field.) If no selection is made, the title will populate as system-generated when the page is saved.

Proposed Position Information

Position Group	Position Type	Lowest Grade	Highest Grade	General Subject	Specific Subject	IB	AP	Percent of Time
Licensed	Teacher	*K	08	Art		<input type="checkbox"/>	<input type="checkbox"/>	60 %
Licensed	Teacher	*K	08	Music	Vocal Music	<input type="checkbox"/>	<input type="checkbox"/>	40 %

Generate System Title Enter Custom Title Assignment Title: Teacher-K8 AdvVocal Music Total Days: 190 Total: 100 %

Step 10: If changing the Funding, review the Proposed Funding Distribution. If making changes, edit the existing row(s) or use the   buttons to add or delete funding rows as needed.

NOTE: To change the FTE distribution on Funding rows, do not zero out the FTE on one row, then add a new row. Instead, add the new row, enter the FTE for that Funding Source, then delete the zero FTE row.

NOTE: If you delete a funding row, click Apply prior to leaving the page.

Step 11: To change the Funding, select the Funding Source.

NOTE: When a Grant funding source is selected the Project/Grant number will auto-populate unless you choose "Other Grants". If you choose "Other Grants", you will need to identify the Grant number.

NOTE: When a grant number populates, the Grant End Date will display. This field cannot be edited.

Step 12: Update the Posn FTE with the appropriate FTE amount for each row.

NOTE: The distribution percentages and weighted FTE will calculate automatically.

Position Details

Department	6987	Imagination	Notes	Fiscal Year	2014
Location	110	Imagination K-8		General Fund Balance	1.500
Employee	005439	Christie,Agatha		Title I Balance	0.090
Position	00007000	Teacher-K8 Art/Vocal Music		Title IC Balance	0.000
Effective Dt	07/01/2013	Seq 2	Action Modify Position	Posn FTE	1.000
Loc Type	K8	Grp Sch K8	Low Gr *K	High Gr 08	
Type					

Action Flag: Initial Add

Click to view Current Position and Funding Information

Position Group	Position Type	Lowest Grade	Highest Grade	General Subject	Specific Subject
Licensed	Teacher	01	02	Classroom/Self-Contained	

Assignment Title: Teacher-K8 Gr 1-2

Funding Source	Project/Grant	Posn FTE
General Fund		1.000

Proposed Position Information

	Position Group	Position Type	Lowest Grade	Highest Grade	General Subject
	Licensed	Teacher	*K	08	Art
	Licensed	Teacher	*K	08	Music

Generate System Title
 Enter Custom Title
 Assignment Title: **Teacher-K8 Art/Vocal Music**
 Total Day:

Proposed Funding Distribution

	Funding Source	Project/Grant	Posn FTE	Grant End Date
	General Fund		.90	
	Other projects/grants	G1258	.10	12/31/2013

Override default funding

Press Apply before clicking to view Chartfield Information

Step 13: Click OK or Apply to save the changes.

NOTE: If a funding group is missing in the chartfield grid, you will not be able to save the change. Call your Budget Analyst for assistance.

NOTE: If you click OK, you'll be taken back to the View/Change page. If you click Apply, you can stay on the Position Details page to make additional changes or view the Chartfields.

NOTE: Click the collapsed Chartfield grid arrow to view the chartfields. You can edit the fields if needed, and save.

NOTE: If you make additional changes in the Position Details area and save them, any edits you made to chartfields will be over-written and you'll need to re-enter them.

Proposed Funding Distribution Find

	Funding Source	Project/ Grant	Posn FTE	Grant End Date
	General Fund		0.900	
	Other projects/grants	G1258	0.100	12/31/2013

Override default funding

Press Apply before clicking to view Chartfield information

Budget Approval	Grant Approval	HR Approval	SPED Approval	ESL Approval
	N/A		N/A	N/A

OK Cancel Apply

NOTE: On the View/Change page, changes you made will be highlighted in blue.

View/Change SMT Help

Department 6987 Imagination Notes Fiscal Year 2014
 Location 110 Imagination K-8 General Fund Balance 1,600
 Employee 005439 Christie,Agatha Title I Balance 0,090 Actions Glossary
Title IC Balance 0,000

	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Empl Status	Dept ID	Loc	Work Days	Posn FTE	Position Details
1	07/01/2013	1	Baseline	Christie,Agatha	005439	0	00007000	Teacher-K8 Gr 1-2	Active	6987	110	190	1.000	
2	07/01/2013	2	Modify Position	Christie,Agatha	005439	0	00007000	Teacher-K8 Art/Vocal Music	Active	6987	110	190	1.000	

OK Cancel Apply

Step 14: Click OK to return to the Staffing Summary page.

View/Change SMT Help

Department 6987 Imagination Notes Fiscal Year 2014
 Location 110 Imagination K-8 General Fund Balance 1,600
 Employee 005439 Christie,Agatha Title I Balance 0,090 Actions Glossary
Title IC Balance 0,000

	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title
1	07/01/2013	1	Baseline	Christie,Agatha	005439	0	00007000	Teacher-K8 Gr 1-2
2	07/01/2013	2	Modify Position	Christie,Agatha	005439	0	00007000	Teacher-K8 Art/Vocal Music

OK Cancel Apply

Step 15: Note that the  next to the row has changed to a , indicating a change.

Step 16: Note any changes to your General Fund FTE and Title I balances.

Staffing Summary		Limited Term Staffing Summary		Funding Summary		Allocations & Balances	
Department	6987	Imagination	Fiscal Year		2014		Approve & Submit
Location	110	Imagination K-8	General Fund Balance	1,600		SMT Help	Open/Edit
Status	Open		Title I Balance	0.090		Employee Lookup	Run SMT Roster
			Title IC Balance	0.000			

Filled Positions									
View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
1 ▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
2 ▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
3 ▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
4 ▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
5 ▲	Charles, Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
6 ▲	Christie, Agatha	Teacher-K8 Art/Vocal Music	1.000	Active	07/01/2013		00007000	005439	0
7 ▲	Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
8 ▲	Dell Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010048	021104	0

The action is complete!

You have now modified a position.

Request New Position

If an existing position cannot be modified to fit your needs and you have FTE available to fund it, you can Request a New Position.

Step 1: Click on Request New Position at the bottom of the Staffing Summary page.

The screenshot shows the 'Staffing Summary' page with tabs for 'Staffing Summary', 'Limited Term Staffing Summary', 'Funding Summary', and 'Allocations & Balances'. The main content area displays department and location information (6987 Imagination, 110 Imagination K-8) and fiscal year (2014). It also shows funding balances: General Fund Balance 1,600, Title I Balance 0,090, and Title IC Balance 0,000. The status is 'Open'. At the bottom, the 'Request New Position' button is circled in red. Other buttons include 'Approve & Submit', 'SMT Help', 'Open/Edit', 'Employee Lookup', and 'Run SMT Roster'. Navigation buttons at the bottom include 'Save', 'Return to Search', 'Notify', 'Update/Display', and 'Include History'.

Step 2: Review the message and Click OK.

NOTE: Clicking Cancel at any point in this process will still create a new position. If you do not want to create the position, you will need to click on the  for the position on the Staffing Summary page, then click on the , click OK on the Delete Confirmation message, then click on OK. The position will no longer show on the Staffing Summary page.

The screenshot shows a 'Message' box with the text: 'Please enter the Work Days and FTE for the new position you are requesting. (20000,284)' and 'You will then move on to the Position Details page to enter the remaining details of your new position.' The 'OK' button is circled in red.

Step 3: Enter the effective date of the position. If the position is starting at the beginning of the school year, use 7/1/xxxx.

The screenshot shows the 'View/Change' page for the position. It displays the same department and location information as Step 1. Below this is a table with columns: 'Personalize | Find | First | 1 of 1 | Last'. The table has columns for 'Effective Date', 'Seq', 'Action', 'Name', 'Empl ID', 'Rcd #', 'Position #', and 'Assign'. The first row shows '1' in the 'Seq' column, '07/01/2013' in the 'Effective Date' column (circled in red), '1' in the 'Action' column, and 'Request New Position' in the 'Name' column. Other buttons include 'SMT Help' and 'Actions Glossary'.

Step 4: **Enter the total number of Work Days for this position.**

NOTE: You can click on the  to look up Work Days.

Step 5: **Enter the FTE for the position.**

Step 6: **Click on Position Details.**

Position Title	Vacancy Status	SearchSoft Posting#	Empl Status	Dept ID	Loc	Work Days	Posn FTE	Position Details
	Recruit	<input type="text"/>		6987	110	<input type="text"/> 	0.000	Position Details

Step 7: Review the message and **Click OK.**

Message

Start filling in the details of this new position by selecting a Position Group. (20000,285)

You will be prompted to fill in additional data as required.

BEFORE POSITION DETAIL ENTRY, PLEASE NOTE: Please make changes in the correct order, beginning with the Proposed Position Information, then moving to the Proposed Funding Distribution. Click Apply, then check the Chartfield Information and make changes if needed.

Step 8: Select the Position Attributes, such as Position Group, Position Type, etc.

NOTE: You can type the first letter of the word you're looking for to narrow the list of choices.

Step 9: If the assignment is IB or AP, check the appropriate box.

Step 10: Enter the Percent of Time the employee is working in the assignment.

Step 11: If there are additional assignments for the new position, Click the  to add additional rows.

Step 12: Click on Generate System Title or Click on Enter Custom Title.

NOTE: Generate System Title will use a system format for the title. The new Position Title will show in the blue box. If this does not accurately describe the assignment you may Enter Custom Title (the blue box will become an editable field). If no selection is made, the title will populate as system-generated when the page is saved.

Step 13: Select the Funding Source for the position.

NOTE: When a Grant funding source is selected the Project/Grant number will auto-populate unless you choose “Other Grants”. If you choose “Other Grants”, you will need to identify the Grant number.

NOTE: When a grant number populates, the Grant End Date will display. This field cannot be edited.

Step 14: Click the  to add additional Funding Sources as needed.

Step 15: Adjust the Posn FTE of the new row and the original row to equal the position FTE displayed in the header at the top of the page.

NOTE: To change the FTE distribution on Funding rows, do not zero out the FTE on one row, then add a new row. Instead, add the new row, enter the FTE for that Funding Source, and then delete the zero FTE row.

Step 16: Click OK or Apply to save the changes.

NOTE: If a funding group is missing in the chartfield grid, you will not be able to save the change. Call your Budget Analyst for assistance.

NOTE: If you click OK, you’ll be taken back to the View/Change page. If you click Apply, you can stay on the Position Details page to make additional changes or view the Chartfields.

NOTE: Click the collapsed Chartfield grid arrow to view the chartfields. You can edit the fields if needed, and save.

NOTE: If you make additional changes in the Position Details area and save them, any edits you made to chartfields will be over-written and you’ll need to re-enter them.

Proposed Position Information					
	Position Group	Position Type	Lowest Grade	Highest Grade	General Subject
	Licensed	Teacher	*K	05	World Language
	Licensed	Teacher	*K	05	Language Arts

Generate System Title
 Enter Custom Title
 Assignment Title
 Teacher-K8 Gr K-5 Spanish/LA
 Total Day

Proposed Funding Distribution				
	Funding Source	Project/ Grant	Posn FTE	Grant End Date
	General Fund		.80	
	Other projects/grants	G1258	.20	12/31/2013

Override default funding

Proposed Funding Distribution				
	Funding Source	Project/ Grant	Posn FTE	Grant End Date
	General Fund		.80	
	Other projects/grants	G1258	.20	12/31/2013

Override default funding

Press Apply before clicking to view Chartfield Information

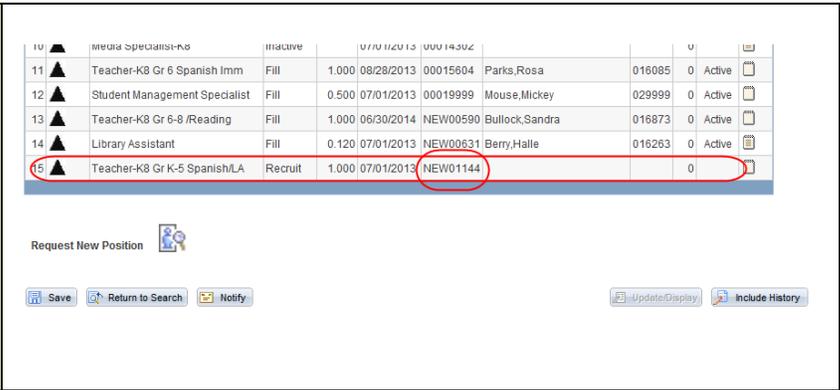
Budget Approval	Grant Approval	HR Approval	SPED Approval	ESL Approval
	N/A	Approved	N/A	N/A

Step 17: Click OK to return to the Staffing Summary page.



NOTE: The new Position Request now appears in the Vacant Position section of the Staffing Summary page.

NOTE: Until the New Position Request is approved, the Position Number will begin with "NEW".



The action is complete!

You have now requested a new position.

Step 3: Enter the **ACTUAL** start date of the new position (the Effective Date).

NOTE: Limited Term positions do not use FTE or set Work Days, so neither is entered on the View/Change page.

Step 4: Scroll to the right and **click on the Position Details link**.

NOTE: Until the New Position Request is approved, the Position Number will begin with "NEW".

The screenshot shows the 'View/Change' interface. At the top, there are fields for Department (6987), Location (110), and Employee. Below this is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Pos #, Position #, Assignment Title, Vacancy Status, Empl Status, Dept ID, Loc, Work Days, Posn FTE, and Position Details. The first row shows '1' in the Effective Date column, 'Request New Position' in the Action column, and 'NEW01145' in the Position # column. The 'Position Details' link in the final column is circled in red. Buttons for 'OK', 'Cancel', and 'Apply' are at the bottom.

Step 5: Review the message and **Click OK**.

The screenshot shows a 'Message' box with a blue header. The text reads: 'Start filling in the details of this new position by selecting a Position Group. (20000,285) You will be prompted to fill in additional data as required.' At the bottom center, there is an 'OK' button circled in red.

Step 6: **Select the Position Group** (Licensed Limited Term or Non-Licensed Limited Term) for the New Position. Then select the **Position Type** from the drop-down list, and enter grades and Subjects if appropriate. Enter Percent of Time if multiple subjects or position types are selected. As always, you may customize the title if you wish.

NOTE: If you select one of the "Temporary Employee" position types, you will be taken to the **Note field** to enter information about the work to be performed so that HR can assign an appropriate position title.

The screenshot shows the 'Position Details' page. It includes fields for Department, Location, Employee, Position, Effective Dt, and Loc Type. Below these is a table for 'Current Position and Funding Information' with columns for Position Group, Position Type, Lowest Grade, Highest Grade, General Subject, Specific Subject, IB, AP, and Percent of Time. At the bottom, there is a 'Proposed Position Information' section with dropdown menus for Position Group (Licensed Limited Term), Position Type (LT Teacher-Hourly), and General Subject (Music). The 'Proposed Position Information' section is highlighted with a red border.

Step 7: Click on Generate System Title or Click on Enter Custom Title.

NOTE: Generate System Title will use a system format for the title. The new Position Title will show in the blue box. If this does not accurately describe the assignment you may Enter Custom Title (the blue box will become an editable field). If no selection is made, the title will populate as system-generated when the page is saved.

The screenshot shows the 'Position Details' form. At the bottom, there are two radio buttons: 'Generate System Title' (which is selected and highlighted with a red circle) and 'Enter Custom Title'. The 'Assignment Title' field is populated with 'LT Tch-Hly-K8 Music'.

Step 8: Select the Funding Source for the position.

NOTE: There are new, required fields for Limited Term positions.

Step 9: Select the Budget Type (varies depending on Funding Source selected), and **Project/Grant** if appropriate.

The screenshot shows the 'Proposed Funding Distribution' form. The 'Funding Source' dropdown is set to 'Other projects/grants', 'Budget Type' is 'Project/Grant', and 'Project/Grant' is 'G1258'. These three fields are circled in red.

Step 10: Enter the Total Estimated Hours needed for the position and tab out of the field. At this point a **Total Amount** will be calculated for you. Please run a Budget to Actual Report to be sure you have the funds available to support this position.

Grant End Date	Total Est Hours	Proposed Hourly Rate	Standard Hourly Rate	Fringe Rate %	Total Amount
12/31/2013	250	40.89	40.89	28.520	

Step 11: Review the message and Click OK.

The screenshot shows a 'Message' dialog box with the following text: 'Fringe benefits have been included in your cost calculation. (20000,327)' and 'Run a Budget to Actual report to verify that funds are available.' At the bottom, there is an 'OK' button circled in red.

NOTE: For most positions, a standard **Hourly Rate** will populate automatically. You may propose a different rate, but this will require review and approval by HR. The district **Fringe Rate** will be populated.

Step 12: **Enter a Proposed Hourly Rate**, if different than the Standard Hourly Rate.

Step 13: **Press Apply** to Save the information.

End Date	Total Est Hours	Proposed Hourly Rate	Standard Hourly Rate	Fringe Rate %	Total Amount
1/1/2013	250.00	40.89	40.89	28.520	13,138

Funding Source	Budget Type	Project/Grant	Grant End Date	Total Est Hours	Proposed Hourly Rate	Standard Hourly Rate	Fringe Rate %	Total Amount
Other projects/grants	Project/Grant	G1258	12/31/2013	250.00	40.89	40.89	28.520	13,138

Press Apply before clicking to view Chartfield Information

Budget Approval: Approved
 DBT Effdt:
 Grant Approval: N/A
 HR Approval: Approved
 SPED Approval: N/A
 ESL Approval: N/A

OK Cancel **Apply**

Step 14. **Open the Chartfield information grid** to view and confirm the chartfields. You may change a value, Apply to save, then OK to return to the View/Change page.

NOTE: See table below for guidance on selecting funding.

Step 15: **Click OK.**

Press Apply before clicking to view Chartfield Information

Funding Group	Posn FTE	Weighted FTE	Distrib %	Account	Program	Class	Fund	Proj/Grant
1	0.000	0.000	100.000					

Funding Group	Posn FTE	Weighted FTE	Distrib %	Account	Program	Class	Fund	Proj/Grant
1	0.000	0.000	100.000	512300	11111	13004	205	G1258

Total: 0.000 0.000 100.000

Budget Approval: Approved
 DBT Effdt:
 Grant Approval: N/A
 HR Approval:
 SPED Approval: N/A
 ESL Approval: N/A

OK Cancel Apply

Step 16: **Click OK** to return to the Limited Term Staffing Summary page.

View/Change

Department: 6987 Imagination
 Location: 110 Imagination K-9
 Employee:

Notes: Fiscal Year: 2014
 General Fund Balance: 0.800
 Title I Balance: 0.000
 Title II Balance: 0.000

SMT Help
 Actions Glossary

Effective Date	Seq	Action	Name	Empl ID	Posn #	Assignment Title	Vacancy Status	Empl Status	Dept ID	Loc	Work Days	Posn FTE	Position Details
07/01/2013	1	Request New Position		0	NEW01145	LT Teacher Music	Vacant		6987	110		0.800	Position Details

OK Cancel Apply

NOTE: Since Limited Term positions do not use FTE, this field will always display as a blank.

NOTE: Additional rows should be added as needed in the View/Change page to End employment, Modify the position (change the hours, funding), etc. These actions should be entered in the same manner as for regular FTE positions.

To move an employee from a Limited Term position to a regular position (or vice versa) on the same SMT, use the Transfer Within action. Then Fill the vacant position with that employee.

The action is complete!

You have now requested a new limited term position.

Tips on selecting funding information for Limited Term positions

Department Type	Funding Source	Budget Type	Proj/Grt
Schools	General Fund	Consolidated	N/A
Schools	General Fund	Additional choices for High Schools	N/A
Schools	Foundation	Foundation	S0083 autopopulates
Schools	Other	A/R School	ACCTR
Schools	Other	A/R Other *	ACCTR
Schools	Other	Project/Grant	Grant number
Schools	Title I	Instruction, Fam Involv, Summer, Professional Development	G1410 autopopulates
Central Ed	General Fund	Departmental	N/A
Central Ed	Title I Central	Prof Development, Instruction	G1411 autopopulates
Central Ed	Other	Project/Grant	Grant number
Other Non-Schools	General Fund	Departmental	N/A
Other Non-Schools	Other	Project/Grant	Grant number
Other Non-Schools	Other	A/R Other *	ACCTR

* Please use the Notepad on the SMT to provide billing information for A/R transactions.

Return from Leave of Absence

The steps below demonstrate how to enter a Return from Leave of Absence into the SMT. It should be used for both partial and full Leaves of Absence.

Step 1: Select the LEAVE row of the employee who is Returning from a Leave of Absence.

NOTE: In most cases, an employee on a Leave of Absence will have two rows in the Filled Position section. One will reflect the Employee's *Active* FTE and the other the corresponding amount of *Leave* FTE. (The exception would be a single Leave row for an employee loaded into the SMT while on a full Leave of Absence.)

Staffing Summary		Limited Term Staffing Summary		Funding Summary		Allocations & Balances	
Department	6987 Imagination	Fiscal Year	2014	<input type="button" value="Approve & Submit"/> <input type="button" value="SMT Help"/>			
Location	110 Imagination K-8	General Fund Balance	0.800	<input type="button" value="Open/Edit"/> <input type="button" value="Employee Lookup"/>			
Status	Open	Title I Balance	0.090	<input type="button" value="Run SMT Roster"/>			
		Title IC Balance	0.000				

Filled Positions		Personalize Find View 15		First 1-31 of 31		Last			
View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
1 ▲	Angelou,Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
2 ▲	Baez,Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
3 ▲	Banderas,Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
4 ▲	Banderas,Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
5 ▲	Charles,Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
6 ▲	Christie,Agatha	Teacher-K8 Art/Vocal Music	1.000	Active	07/01/2013		00007000	005439	0
7 ▲	Curie,Marie	Principal-K8			07/01/2013		00003668	011362	0
8 ▲	Dali,Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010948	021101	0
9 ▲	Earheart,Amelia	Assistant Principal-K8			07/01/2013		00011010	015845	0
10 ▲	Einstein,Alfred	Teacher-K8 Gr 3-8 Science/Tech	1.000	Active	06/30/2014		00014011	017548	0
11 ▲	Fernandez,Rudy	Teacher-K8 Gr 2 Spanish Imm	1.000	Active	07/01/2013		00001169	003610	0
12 ▲	Ford,Harrison	Teacher-K8 Gr K-5 Art			06/30/2014		00006996	019753	0
13 ▲	Garland,Judy	Counselor-K8	1.000	Active	07/01/2013		00014865	004095	0
14 ▲	Goodall,Jane	Teacher-K8 PE	0.500	Active	07/01/2013		00007537	001347	0
15 ▲	Griffith,Joan	Teacher-K8 Gr 1	1.000	Active	06/30/2014		00007672	010767	0
16 ▲	Hayek,Salma	Teacher-K8 Gr 5 Spanish Imm	1.000	Active	06/30/2014		00002911	018021	0
17 ▲	Hepburn,Katherine	School Secretary-K8			07/01/2013		00007022	009574	0
18 ▲	Kahlo,Frida	Teacher-K8 Gr 3	1.000	Active	07/01/2013		00006997	020494	0
19 ▲	Keller,Helen	Teacher-K8 Gr K	1.000	Active	07/01/2013		00002694	010807	0
20 ▲	Kennedy,Jackie	Principal's Secretary-K8	1.000	Active	07/01/2013		00004269	015687	0
21 ▲	Lindbergh,Anne	Media Specialist-K8	0.375	Active	07/01/2013		00014302	012724	0
22 ▲	Lindbergh,Anne	Teacher-K8 Gr 6-8 LA	0.375	Active	07/01/2013		00010949	012724	0
23 ▲	Lindbergh,Anne	Media Specialist-K8	0.250	Leave	07/01/2013		00014302	012724	1
24 ▲	Oakley,Annie	Teacher-K8 Gr K	1.000	Active	07/01/2013		00002185	019950	0
25 ▲	Picasso,Pablo	Gr K-5 Art	0.500	Active	07/01/2013		00007001	021107	0
26 ▲	Rivera,Diego	Teacher-K8 Gr K Spanish Imm	1.000	Active	07/01/2013		00006995	020392	0
27 ▲	Roosevelt,Eleanor	Teacher-K8 Gr 3	1.000	Active	06/30/2014		00005201	006461	0
28 ▲	Shakespeare,William	Teacher-K8 LA/Reading	0.750	Active	07/01/2013		00004914	007738	0
29 ▲	Shakespeare,William	Teacher-K8 LA/Reading	0.250	Leave	07/01/2013		00004914	007738	0
30 ▲	Torres,Dara	Library Assistant	0.500	Active	06/30/2014		00006625	016263	0
31 ▲	Winifred,Orph	Teacher-K8 Gr 1	1.000	Active	07/01/2013		00007208	011753	0

Step 2: Enter the Effective Date for the Return from Leave of Absence.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 3: Select Return from Leave action.

Step 4: Click OK to return to the Staffing Summary page, or you can scroll to the right and select the Position Details to review the Proposed Funding Distribution. If the funding needs to be changed, please see the section for Modify Position.

View/Change

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance 0.800 Actions Glossary
 Employee 007738 Shakespeare,William Title I Balance 0.090
 Title IC Balance 0.000

Personnel	Find	Print	1-2 of 2	Last						
	*Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status	Empl Status
	07/01/2013	1	Leave of Absence	Shakespeare,William	007738	1	00004914	Teacher-K8 LA/Readr		Leave
	10/01/2013		Return from Leave			0				

End Employment
Return from Leave

OK Cancel Apply

Step 5: The Staffing Summary page will now display two Active rows for the employee.

For help with combining two rows, contact your Staffing Specialist or Budget Analyst.

If you would like to combine these two rows into one, first check the funding for each row in case there is more than one source. Add a Modify Position row to the LOA-Working FTE row and increase the FTE to the full position FTE. Update proposed funding if needed. Go to the second Active row and add Inactivate Position after the Return from Leave row. The FTE zeroes out. After rollup occurs, a single row will display.

25	▲	Picasso,Pablo	Gr K-> Art	0.500	Active	07/01/2013	00007001	021107	0
26	▲	Rivera,Diego	Teacher-K8 Gr K Spanish Imm	1.000	Active	07/01/2013	00006995	020392	0
27	▲	Roosevelt,Eleanor	Teacher-K8 Gr 3	1.000	Active	06/30/2014	00005201	006461	0
28	▲	Shakespeare,William	Teacher-K8 LA/Reading	0.750	Active	07/01/2013	00004914	007738	0
29	▲	Shakespeare,William	Teacher-K8 LA/Reading	0.250	Active	10/01/2013	00004914	007738	0
30	▲	Torres,Dara	Library Assistant	0.500	Active	06/30/2014	00006625	016263	0
31	▲	Winfrey,Orsh	Teacher-K8 Gr 1	1.000	Active	07/01/2013	00007308	041753	0

25	▲	Picasso,Pablo	Gr K-> Art	0.500	Active	07/01/2013	00007001	021107	0
26	▲	Rivera,Diego	Teacher-K8 Gr K Spanish Imm	1.000	Active	07/01/2013	00006995	020392	0
27	▲	Roosevelt,Eleanor	Teacher-K8 Gr 3	1.000	Active	06/30/2014	00005201	006461	0
28	▲	Shakespeare,William	Teacher-K8 LA/Reading	1.000	Active	10/01/2013	00004914	007738	0
29	▲	Shakespeare,William	Teacher-K8 LA/Reading			10/01/2013	00004914	007738	0
30	▲	Torres,Dara	Library Assistant	0.500	Active	06/30/2014	00006625	016263	0
31	▲	Winfrey,Orsh	Teacher-K8 Gr 1	1.000	Active	07/01/2013	00007308	041753	0

Step 6: If the employee is returning from leave only partially, on the Staffing Summary page, select the



for the Active row that shows the employee's full FTE.

NOTE: You will need to return the employee from leave to their full FTE, then follow the instructions for Leave of Absence to put them back out on a partial leave.

26	▲	Rivera, Diego	Teacher-K8 Gr K Spanish Imm	1.000	Active	07/01/2013	00006995	020392	0
27	▲	Roosevelt, Eleanor	Teacher-K8 Gr 3	1.000	Active	06/30/2014	00005201	006461	0
28	▲	Shakespeare, William	Teacher-K8 LA/Reading	1.000	Active	10/01/2013	00004914	007738	0
29	▲	Shakespeare, William	Teacher-K8 LA/Reading			10/01/2013	00004914	007738	0
30	▲	Torres, Dara	Library Assistant	0.500	Active	06/30/2014	00006625	016263	0
31	▲	Winfrey, Sarah	Teacher-K8 Cr 1	1.000	Active	07/01/2013	00007308	014753	0

Step 7: Click on the  to add a row and enter the effective date for the Return from Leave.

NOTE: You must enter the Effective Date before you select any action. The Effective Date will become display-only after the action is selected.

Step 8: Select the Leave of Absence action.

Personnel Change

Department: 6987 Imagination Fiscal Year: 2014 SMT Help

Location: 110 Imagination K-8 General Fund Balance: 0.300 Actions Glossary

Employee: 007738 Shakespeare, William Title I Balance: 0.090 Title IC Balance: 0.000

Seq	Effective Date	Seq	Action	Name	Empl ID	Pos #	Position #	Assignment Title	Vacancy Status	Empl Status	Dept ID	Loc	Work Days	Posn FTE	Position Details
1	07/01/2013	1	Baseline	Shakespeare, William	007738	0	00004914	Tchr-K8 Read/Gr-EL/InSp-Read		Active	6987	110	190	1.000	Position Details
2	07/01/2013	2	Modify Position	Shakespeare, William	007738	0	00004914	Tchr-K8 Read/Gr-EL/InSp-Read		Active	6987	110	190	1.000	Position Details
3	07/01/2013	3	Modify Position	Shakespeare, William	007738	0	00004914	Teacher-K8 LA/Reading		Active	6987	110	190	1.000	Position Details
4	07/01/2013	4	LOA - Working FTE	Shakespeare, William	007738	0	00004914	Teacher-K8 LA/Reading		Active	6987	110	190	0.750	Position Details
5	10/01/2013	5	Modify Position	Shakespeare, William	007738	0	00004914	Teacher-K8 LA/Reading		Active	6987	110	190	1.000	Position Details
6	10/01/2013		Leave of Absence								6987	110		0.000	Position Details

OK Cancel Apply

Step 9: Read the message information about Leaves of Absence and creating a vacancy and Click OK to continue entering a Leave of Absence.

Message

This action will create a vacancy. Click OK to continue or Cancel to re-enter a new action. (20000,36)

OK Cancel

Step 10: Read the pop-up message information about entering FTE for a Leave of Absence and Click OK to continue entering a Leave of Absence.

Message

Enter the amount of FTE the Employee will continue to work, or 0 if the Leave is full. (20000,40)

LOA paperwork submission is required.

OK

Step 11: Enter the new FTE the employee will work.

Step 12: Click OK to save the changes and return to the Staffing Summary page.

NOTE: After saving, you will notice that the Action automatically changes from "Leave of Absence" to "LOA - Working FTE."

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014

Location 110 Imagination K-8 General Fund Balance **0.550**

Employee 007738 Shakespeare,William Title I Balance **0.090**

Title IC Balance **0.000**

[SMT Help](#)

[Actions Glossary](#)

	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status	Empl Status	Dept ID	Loc	Work Days	Posn FTE
1	07/01/2013	1	Baseline	Shakespeare,William	007738	0	00004914	Tchr-K8 Read/Gr7-8LAnSp-Read		Active	6987	110	190	1.000
2	07/01/2013	2	Modify Position	Shakespeare,William	007738	0	00004914	Tchr-K8 Read/Gr7-8LAnSp-Read		Active	6987	110	190	1.000
3	07/01/2013	3	Modify Position	Shakespeare,William	007738	0	00004914	Teacher-K8 LARReading		Active	6987	110	190	1.000
4	07/01/2013	4	LOA - Working FTE	Shakespeare,William	007738	0	00004914	Teacher-K8 LARReadr		Active	6987	110	190	0.750
5	10/01/2013	5	Modify Position	Shakespeare,William	007738	0	00004914	Teacher-K8 LARReading		Active	6987	110	190	1.000
6	10/01/2013	6	Leave of Absence	Shakespeare,William	007738	0	00004914	Teacher-K8 LARReading		Active	6987	110	190	1.000

OK Cancel Apply

Step 13: The employee will now have three rows on the Staffing Summary page.

One row displays a status of Active and no FTE. This was the previous leave of absence row. For help combining the two Active rows, see step 5 of this section.

One row reflects the amount of FTE the employee will work and displays a status of "Active." The action name for this row is automatically updated to "LOA – Working FTE" when the FTE changes are saved.

The remaining row will display the amount of Leave FTE the employee is taking, with an employee status of "Leave." The action is called "Leave of Absence."

Note that the ▲s next to both rows are filled, indicating a change.

Step 14: In the Vacancy section, note the new "Leave Backfill" vacancy created as a result of the new Leave of Absence action. It will have the same position number, funding, and description as that of the employee who is taking the Leave of Absence; however, the position number will be changed by HR once the position is filled.

NOTE: Vacancies created by a Leave of Absence default to a Vacancy Status of Recruit. See the Fill Vacancy action (page 40) on filling the Leave Backfill position.

25	▲	Picasso,Pablo	Gr K-5 Art	0.500	Active	07/01/2013		00007001	021107	0
26	▲	Rivera,Diego	Teacher-K8 Gr K Spanish Imm	1.000	Active	07/01/2013		00006995	020392	0
27	▲	Roosevelt,Eleanor	Teacher-K8 Gr 3	1.000	Active	06/30/2014		00005201	006461	0
28	▲	Shakespeare,William	Teacher-K8 LA/Reading	0.800	Active	10/01/2013		00004914	007738	0
29	▲	Shakespeare,William	Teacher-K8 LA/Reading			10/01/2013		00004914	007738	0
30	▲	Shakespeare,William	Teacher-K8 LA/Reading	0.200	Leave	10/01/2013		00004914	007738	1
31	▲	Torres,Dara	Library Assistant	0.500	Active	06/30/2014		00006625	016263	0
32	▲	Winifred Onrah	Teacher-K8 Gr 1	1.000	Active	07/01/2013		00007308	011753	0

Vacant Positions										
View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
1 ▲	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	00000382				0	
2 ▲	Teacher-K8 Gr 5	Inactive		07/01/2013	00002453				0	
3 ▲	Principal-K8	Recruit	1.000	07/01/2013	00003668				0	
4 ▲	Teacher-K8 LA/Reading	Recruit	0.200	10/01/2013	00004914				0	
5 ▲	Techr. Gr 7-8 Math/Sci 2-8 Tech			06/30/2014	00006736	Lindbergh,Charles	011754		0	

Step 15: Determine whether to Transfer or End the Employment of the employee who filled the Leave Backfill position.

If you do not complete one of these actions for the Leave Backfill employee, you will double-count the FTE for the employee Returning from Leave and the Leave Backfill position.

The action is complete!

You have now entered the information necessary for an employee to Return from a Leave of Absence.

Transfer Out

The steps below demonstrate how to Transfer an Employee Out of your SMT department and location combination.

Step 1: Enter the Effective Date for the Transfer Out of your department and location SMT combination.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Transfer Out from the Action list.

The screenshot shows the 'ViewChange' window for employee Baez, Joan. The 'Action' dropdown menu is open, and 'Transfer Out' is selected. The effective date '07/01/2013' is highlighted in red in the table below.

	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy
1	07/01/2013	1	Baseline	Baez,Joan	021138	0	00006999	Teacher-K8 Gr 1-2	
2	07/01/2013	2	Modify Position	Baez,Joan	021138	0	00006999	Teacher-K8 Gr 4	
3	07/01/2013		Transfer Out			0			

Step 3: Read the message regarding the vacancy created by transferring an employee out.

Click OK to continue the Transfer Out process.

The message dialog box contains the text: "This action will create a vacancy. Click OK to continue or Cancel to re-enter a new action. (20000,36)". The 'OK' button is highlighted in red.

Step 4: Verify information about the Transfer Out.

Step 5: Click OK to save the changes and return to the Staffing Summary page.

NOTE: If you click Cancel at this point, the Transfer Out Row will not be saved; however, the vacancy will have already been created and you will need to delete the vacancy.

The screenshot shows the 'ViewChange' window with the completed table. The 'OK' button is highlighted in red.

	Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy
1	07/01/2013	1	Baseline	Baez,Joan	021138	0	00006999	Teacher-K8 Gr 1-2	
2	07/01/2013	2	Modify Position	Baez,Joan	021138	0	00006999	Teacher-K8 Gr 4	
3	07/01/2013	3	Transfer Out	Baez,Joan	021138	0	00006999	Teacher-K8 Gr 4	

Step 6: Note that the  next to the row has changed to a , indicating a change.

Also note that the FTE for the employee who Transferred Out is now blank.

Step 7: Note the new vacancy that has been created. It is identical to the position that was filled by the employee who Transferred Out.

NOTE: A note attached to the vacancy will automatically be created and indicate the reason for the vacancy. For example, "Vacancy due to the Transfer Out of Mouse, Mickey." The note will be added under the name of the person who performed the action.

Staffing Summary		Limited Term Staffing Summary		Funding Summary		Allocations & Balances	
Department	6987	Imagination	Fiscal Year	2014		Approve & Submit SMT Help	
Location	110	Imagination K-8	General Fund Balance	0.550		Open/Edit Employee Lookup	
Status	Open		Title I Balance	0.090		Run SMT Roster	
			Title IC Balance	0.000			

View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
▼	Baez, Joan	Teacher-K8 Gr 4			07/01/2013		00006999	021138	0
▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
▲	Charles, Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
▲	Christie, Agatha	Teacher-K8 Art/Vocal Music	1.000	Active	07/01/2013		00007000	005439	0
▲	Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
▲	Dali, Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010948	021101	0
▲	Earheart, Amelia	Assistant Principal-K8			07/01/2013		00011010	015845	0
▲	Einstein, Alfred	Teacher-K8 Gr 3-8 Science/Tech	1.000	Active	06/30/2014		00014011	017548	0
▲	Fernandez, Rudy	Teacher-K8 Gr 2 Spanish Imm	1.000	Active	07/01/2013		00001169	003610	0
▲	Ford, Harrison	Teacher-K8 Gr K-5 Art			06/30/2014		00006996	019753	0
▲	Garland, Judy	Counselor-K8	1.000	Active	07/01/2013		00014865	004095	0
▲	Goodall, Jane	Teacher-K8 PE	0.500	Active	07/01/2013		00007537	001347	0
▲	Griffith, Joan	Teacher-K8 Gr 1	1.000	Active	06/30/2014		00007672	010767	0

View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
▲	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	00000382			0		
▲	Teacher-K8 Gr 5	Inactive		07/01/2013	00002453			0		
▲	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
▲	Teacher-K8 LA/Reading	Recruit	0.200	10/01/2013	00004914			0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech			06/30/2014	00005736	Linderbergh, Charles	017548	0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech	Inactive		06/30/2014	00005736			0		
▲	Teacher-K8 Gr 1 Spanish Imm	Fill	1.000	07/01/2013	00006998	Mouse, Mickey	029999	0	Active	
▼	Teacher-K8 Gr 4	Recruit	1.000	07/01/2013	00006999			0		
▲	School Secretary-K8	Recruit	1.000	07/01/2013	00007022			0		
▲	Assistant Principal-K8	Inactive		07/01/2013	00011010			0		
▲	Media Specialist-K8	Inactive		07/01/2013	00014302			0		
▲	Teacher-K8 Gr 6 Spanish Imm	Fill	1.000	08/28/2013	00015604	Parks, Rosa	016085	0	Active	
▲	Student Management Specialist	Fill	0.500	07/01/2013	00019999	Mouse, Mickey	029999	0	Active	
▲	Teacher-K8 Gr 6-8 /Reading	Fill	1.000	06/30/2014	NEW00590	Bullock, Sandra	016873	0	Active	
▲	Library Assistant	Fill	0.120	07/01/2013	NEW00631	Berry, Halle	016263	0	Active	

[Request New Position](#) 

[Save](#) [Return to Search](#) [Notify](#)

[Update/Display](#) [Include History](#)

The action is complete!

You have now transferred an employee out of your department and location.

Transfer Within

If you have an Employee who will fill a vacancy to perform a different assignment in the same department and location SMT combination, you will use the SMT **Transfer Within** action.

You will also Fill a Vacancy as part of this action.

Step 1: Enter the Effective Date for the Transfer Within.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance **-0.450** Actions Glossary
 Employee 010767 Griffith,loan Title I Balance **0.090**
 Title IC Balance **0.000**

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title
07/01/2013	1	Baseline	Griffith,loan	010767	0	00007672	Teacher-K8 Gr 3-4
07/01/2013	2	Modify Position	Griffith,loan	010767	0	00007672	Teacher-K8 Gr 1
07/01/2013	3	Transfer Within			0		

OK Cancel Apply

- End Employment
- Leave of Absence
- Location Change
- Modify Position
- Transfer Out
- Transfer Within
- Unassignment

Step 2: Select Transfer Within from the Action list.

Step 3: Read the note about vacancy creation and Click OK to continue the Transfer Within action.

Message

This action will create a vacancy. Click OK to continue or Cancel to re-enter a new action. (20000,36)

OK Cancel

Step 4: Note the spelling of the employee's Name and Empl ID. You will need to enter this information in Step 10 for Filling the Vacancy.

Step 5: Click OK to save the changes and return to the Staffing Summary page.

NOTE: If you click Cancel at this point, the Transfer Within Row will not be saved; however, the vacancy will have already been created and you will need to delete the vacancy.

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance **0.450** Actions Glossary
 Employee 010767 Griffith,Joan Title I Balance **0.090**
 Title IC Balance **0.000**

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title
07/01/2013	1	Baseline	Griffith,Joan	010767	0	00007672	Teacher-K8 Gr 3-4
07/01/2013	2	Modify Position	Griffith,Joan	010767	0	00007672	Teacher-K8 Gr 1
07/01/2013	3	Transfer Within	Griffith,Joan	010767	0	00007672	Teacher-K8 Gr 1

OK Cancel Apply

Step 6: Note that the  next to the row has changed to a , indicating a change.

The changed employee row will have a blank FTE.

Step 7: Click on the  for the vacant position that you want the employee to fill.

NOTE: You can only transfer an employee within your department and location to a vacant position.

12		Furu,Namisu	Teacher-K8 Gr 3-4			00000214		00000990	019733	0
13		Garland,Judy	Counselor-K8	1.000	Active	07/01/2013		00014865	004095	0
14		Goodall,Jane	Teacher-K8 PE	0.500	Active	07/01/2013		00007537	001347	0
15		Griffith,Joan	Teacher-K8 Gr 1			07/01/2013		00007672	010767	0

View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
1	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	00000382			0		
2	Teacher-K8 Gr 5	Recruit	1.000	07/01/2013	00002453			0		
3	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
4	Teacher-K8 LA/Reading	Recruit	0.200	10/01/2013	00004914			0		
5	Teach Gr 3-8 Math/Sci 3-8 teach			06/30/2014	00005736	Lindbergh,Charles	017648	0		

Step 8: Enter the Effective Date for the transferring employee to fill this position.

Step 9: Select the Fill Vacancy action.

Step 10: Enter the Employee Name and Empl ID.

Step 11: Click OK to save the changes and return the Staffing Summary page.

ViewChange

Department 6987 Imagination Notes Fiscal Year 2014 SMT Help
 Location 110 Imagination K-8 General Fund Balance 0.456 Actions Glossary
 Employee Title I Balance 0.090 Title IC Balance 0.000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Vacancy Status
07/01/2013	1	Baseline			0	00002453	Teacher-K8 Gr 5	Recruit
07/01/2013		Fill Vacancy	Gruffudd,Ioan	010767				

Fill Vacancy
 Inactivate Position
 Location Change
 Modify Position

OK Cancel Apply

Step 12: Note that the  next to the row has changed to a , indicating a change.

Step 13: Note the new vacancy that has been created. It is identical to the position that was filled by the employee who Transferred Within. Also, the employee's information is now listed in the new position's row.

NOTE: A note attached to the vacancy will automatically be created and indicate the reason for the vacancy. For example, "Vacancy due to the Transfer Within of Mouse,Mickey." The note will be added under the name of the person who performed the action.

Vacant Positions

View / Change	Assignment Title	Vacancy Status	Total FTE	Effective Date	Position #	Name	Empl ID	Rcd #	Empl Status	Notes
▲	Teacher-K8 Gr 4 Spanish Imm	Recruit	0.500	07/01/2013	0000382			0		
▲	Teacher-K8 Gr 5	Fill	1.000	07/01/2013	00002453	Gruffudd,Ioan	010767	0	Active	
▲	Principal-K8	Recruit	1.000	07/01/2013	00003668			0		
▲	Teacher-K8 LA/Reading	Recruit	0.200	10/01/2013	00004914			0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech			08/30/2014	00005736	Lindbergh,Charles	017548	0		
▲	Tchr- Gr 7-8 Math/sci 3-8 tech	Inactive		06/30/2014	00005736			0		
▲	Teacher-K8 Gr 1 Spanish Imm	Fill	1.000	07/01/2013	00006998	Mouse,Mickey	029999	0	Active	
▲	Teacher-K8 Gr 4	Recruit	1.000	07/01/2013	00006999			0		
▲	School Secretary-K8	Recruit	1.000	07/01/2013	00007022			0		
▲	Teacher-K8 Gr 1	Recruit	1.000	07/01/2013	00007672			0		
▲	Assistant Principal-K8	Inactive		07/01/2013	00011010			0		
▲	Media Specialist-K8	Inactive		07/01/2013	00014302			0		
▲	Teacher-K8 Gr 6 Spanish Imm	Fill	1.000	08/28/2013	00015604	Parks,Rosa	016085	0	Active	
▲	Student Management Specialist	Fill	0.500	07/01/2013	00019999	Mouse,Mickey	029999	0	Active	
▲	Teacher-K8 Gr 6-8 /Reading	Fill	1.000	08/30/2014	NEW00590	Bullock,Sandra	016873	0	Active	

The action is complete!

You have now transferred an employee to a different position within your department and location.

Unassignment

The steps below demonstrate how to **Unassign** an employee. You can **Unassign** an employee fully (e.g. change their FTE to 0) or partially (e.g. 0.50 employee working at the site and 0.50 Unassigned).

Please make sure you verify the contractual requirements before you Unassign an employee.

Step 1: Enter the Effective Date for the Unassignment.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Unassignment from the Action list.

The screenshot shows the 'ViewChange' interface for employee Christie Agatha. At the top, there are summary statistics: Department 6987, Location 110, Employee 005439, Fiscal Year 2014, General Fund Balance 0.450, Title I Balance 0.090, and Title II Balance 0.000. Below this is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, Assignment Title, Vacancy Status, Empl Status, Dept ID, Loc, Work Days, and Posn FTE. Row 1 shows 'Baseline' for 07/01/2013. Row 2 shows 'Modify Position' for 07/01/2013. Row 3 shows 'Unassignment' for 07/01/2013, which is highlighted with a red circle. A dropdown menu is open for the 'Unassignment' row, listing options like 'End Employment', 'Leave of Absence', 'Location Change', 'Modify Position', 'Transfer Out', 'Transfer Within', and 'Unassignment'. The 'Unassignment' option is also circled in red. Buttons for 'OK', 'Cancel', and 'Apply' are at the bottom.

Step 3: Read the pop-up message information about Unassignment and Click OK to continue the Unassignment process.

The screenshot shows a 'Message' dialog box with a blue header. The text inside reads: 'Enter FTE the Employee will continue to work, or 0 if the unassignment is full. (20000,38)' and 'Unassignment letter submission is required.' At the bottom center, there is an 'OK' button circled in red.

Step 4: Enter the new FTE the employee will work. If you are fully unassigning the employee, enter "0.00".

If you are partially unassigning the employee, enter the new amount the employee will work (for example, "0.50").

Step 5: Click OK to save the changes and return to the Staffing Summary page.

This screenshot is similar to the first one, but the 'Posn FTE' value for the 'Unassignment' row (row 3) is now 0.00, which is circled in red. The 'OK' button at the bottom is also circled in red.

Step 6: Note that the  next to the row has changed to a , indicating a change.

Also note that the FTE for a fully unassigned employee is now blank; for a partially unassigned employee the FTE will be reduced.

No vacancy is created as a result of the Unassignment action.

View / Change		Name	Assignment Title	Total FTE	Emp Status	Effective Date	Notes	Position #	Empl ID	Rcd #
1		Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
2		Baez, Joan	Teacher-K8 Gr 4			07/01/2013		00006999	021138	0
3		Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
4		Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
5		Charles, Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
6		Christie, Agatha	Teacher-K8 Art/Vocal Music	0.500	Active	07/01/2013		00007000	005439	0
7		Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
8		Dali Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010948	021101	0

Step 7: Complete necessary Unassignment notices.

Send a copy of the Unassignment notice to:

- The affected employee
- Human Resources

Unassignment notices are available on the HR Website under Staffing Handbook or by calling your Staffing Team member.

The action is complete!

You have now unassigned an employee.

Submitting & Re-opening Your SMT

Submitting your SMT

When you have finished making changes to the SMT, you must Submit it. Doing so informs central office staff that you are ready for those changes to be processed. In addition, the SMT performs a final calculation to check FTE balancing within funding groups when the Approve & Submit button is clicked. If your funding groups are not balanced, you will need to make further adjustments and then Submit again.

ONLY department managers/principals or a manager-designated assistant will be able to Approve & Submit the SMT. If you wish to designate an assistant as an additional Submitter, please contact your HR Staffing Specialist.

You must balance or have FTE available in all allocated FTE funding categories before you will be able to approve & submit your SMT.

To Approve & Submit your SMT:

Step 1: Navigate to the Allocations & Balances or Staffing Summary page.

Step 2: Click the Approve & Submit button.

NOTE: To make any changes after Submitting, you will need to Re-Open your SMT.

The screenshot shows the 'Approve & Submit' button circled in red. The interface includes a header with navigation tabs: Staffing Summary, Limited Term Staffing Summary, Funding Summary, and Allocations & Balances. Below the header, there is a summary section with the following information:

- Department: 6987 Imagination
- Location: 110 Imagination K-8
- Fiscal Year: 2014
- General Fund Balance: 0.000
- Status: Open

Buttons for 'Approve & Submit', 'Open/Edit', and 'Recalc Balances' are visible. Below the summary is a table for 'General Fund Total' with columns: Funding Group, Dept, Location, Allocation Type, Allocated Equiv, Used Equiv Filled Section, Used Equiv Vacant Section, Balance Equiv, and Actual Position FTE. The table contains 5 rows of data and a total row.

Funding Group	Dept	Location	Allocation Type	Allocated Equiv	Used Equiv Filled Section	Used Equiv Vacant Section	Balance Equiv	Actual Position FTE
1 Gen Fund Licensed	1238	238	FTE	16.900	14.090	2.000	0.810	16.090
2 Gen Fund Classified Repr 5 wt	1238	238	FTE	1.000	0.750	0.560	-0.310	2.620
3 Gen Fund Admin-Licensed	1238	238	FTE	2.000		2.000	0.000	2.000
4 Gen Fund Kindergarten	1238	238	FTE	1.500	1.500		0.000	1.500
5 Gen Fund Counselor	1238	238	FTE	0.500	1.000		-0.500	1.000
General Fund FTE				21.900	17.340	4.560	0.000	23.210
Total Gen Fund FTE with Arts				22.400	17.840	4.560	0.000	23.710

Below the 'General Fund Total' table is a table for 'General Fund Arts' with columns: Funding Group, Dept, Location, Allocation Type, Allocated Equiv, Used Equiv Filled Section, Used Equiv Vacant Section, Balance Equiv, and Actual Position FTE. It contains 1 row of data and a total row.

Funding Group	Dept	Location	Allocation Type	Allocated Equiv	Used Equiv Filled Section	Used Equiv Vacant Section	Balance Equiv	Actual Position FTE
1 Gen Fund Arts Licensed	1238	238	FTE	0.500	0.500	0.000	0.000	0.500

Re-Opening Your SMT

The SMT is intended to be a year-round staffing management tool. After the initial Submit, you will need to open and edit your SMT to enter any additional changes about your workforce and vacant positions. Then, submit your SMT again for processing.

You can only re-open your SMT after it has been Submitted successfully. Managers, Users and Approvers all have the ability to re-open the SMT.

To Re-Open your SMT:

Step 1: Navigate to the Allocations & Balances or the Staffing Summary page.

Step 2: Click the Open/Edit button.

Step 3: Perform actions as needed, then press the Approve & Submit button from either the Allocations & Balances or Staffing Summary page.

The screenshot shows the 'Allocations & Balances' tab selected. At the top, it displays: Department 6987 Imagination, Location 110 Imagination K-8, Fiscal Year 2014, General Fund Balance 0.000, Status Submitted, and Date 07/18/13 12:46:05PM. There are buttons for 'Approve & Submit', 'Open/Edit' (circled in red), and 'Recalc Balances'. Below this is a table titled 'General Fund Total' with columns: Funding Group, Dept, Location, Allocation Type, Allocated Equiv, Used Equiv Filled Section, Used Equiv Vacant Section, Balance Equiv, and Actual Position FTE. The table lists four funding groups and their respective values.

Funding Group	Dept	Location	Allocation Type	Allocated Equiv	Used Equiv Filled Section	Used Equiv Vacant Section	Balance Equiv	Actual Position FTE
1 Gen Fund Licensed	1232	232	FTE	19.260	12.260	7.250	0.250	19.510
2 Gen Fund Classified Repr. 5 wt	1232	232	FTE	1.000	0.750		0.250	1.500
3 Gen Fund Admin-Licensed	1232	232	FTE	2.000	2.000		0.000	2.000
4 Gen Fund Kindergarten	1232	232	FTE	1.500	0.500	1.000	0.000	1.500
General Fund FTE				23.760	15.510	8.250	0.000	24.510
Total Gen Fund FTE with Arts				24.260	16.010	8.250	0.000	25.010

Approval Process

Approval Process

There are five departments that are part of the approval process: **Budget, Grant Accounting, HR, SPED, and ESL**. Once you submit your SMT, your changes are reviewed, approved, and executed by the appropriate approver(s).

NOTE: You can view approval status from the View/Change page of a record OR by looking at the Position Details information for a position or employee.

The information will be the same in both locations.

Position Details	Budget Approval	DBT Effdt	Grant Approval	HR Approval	SPED Approval	ESL Approval
Position Details	N/A		N/A	N/A	N/A	N/A
Position Details	Completed		N/A	Comp	N/A	N/A

OR

Proposed Position Information						
	Position Group	Position Type	Lowest Grade	Highest Grade	General Subject	Specific Subject
	Licensed	Teacher	05	05	Classroom/Self-Contained	
<input type="radio"/> Generate System Title <input type="radio"/> Enter Custom Title		Assignment Title	Teacher-K8 Gr 5		Total Days	190

Proposed Funding Distribution			
Funding Source	Project/ Grant	Posn FTE	Grant End Date
General Fund		1.000	

Override default funding

Press Apply before clicking to view Chartfield Information

Budget Approval	Grant Approval	HR Approval	SPED Approval	ESL Approval
Completed	N/A	Completed	N/A	N/A

OK Cancel Apply

Note: Though the approval status meanings may vary among departments, for any approval column:

- **N/A indicates that approval from this group is not applicable.**
- **If the status for a department is blank, the department’s approval is required but it has not been processed yet.**

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Appendix

Appendix: Actions Glossary

Action	Definition	Result	Comments
End Employment	Use to indicate resignation, retirement, termination or break in service from the District - voluntary or involuntary.	FTE will display as 0.0 on this row. A vacancy is automatically created for the position. User is responsible for managing the vacancy.	Cannot be used in place of Unassignment.
Fill Vacancy	Use to Fill any vacant position.	Position information copies down. Enter an applicant or employee name and employee ID number (if current PPS employee).	Action is only available for use in the Vacant Positions section. May be entered by end user or HR.
Inactivate Position	Use when a position is no longer part of your program.	FTE on this row will display as 0.0.	Action is available for use in the Vacant Positions section and as an action subsequent to a Return from Leave of Absence.
Leave of Absence	Use when an employee will go on a Leave of Absence. Indicate the amount of FTE an employee will remain working (0.0 if full Leave of Absence).	A Filled position row with a status of "Active" will be created to indicate the amount of FTE the employee will work, even if 0.0. A Filled position row with a status of "Leave" will be created, indicating the amount of FTE the employee is on Leave. A Leave Backfill vacancy is created in the Vacant Positions section for the amount of FTE the employee will not work.	All Leaves of Absence must be entered on the SMT.
Location Change	Use to move a filled or vacant position from one Location to another within the same Department. (Position remains same, only its location changes.) Enter the new Location ID in the location field.	A note will automatically be added to the Notepad with information about the location change. The row remaining at current location will have 0.0 FTE. The row at the new location will have the associated FTE.	Primarily for ESL/Special Ed/Special Programs and some Central offices.

Action	Definition	Result	Comments
Modify Position	Use to indicate a change in Work Year, FTE, Position Title or Attributes, or Funding for an employee or vacant position. To modify an assignment, enter or modify the editable fields on the Position Details page.	Updated Work Year, FTE, Position Title or Attributes, or Proposed Funding Distribution will display.	Cannot be used in place of employee Unassignment. Check for correct endorsement(s) when appropriate.
Return from Leave	Use to return an employee whose employment status is Leave back into Active status.	Employee will return to former position and last identified funding.	Check that the correct Funding Group has been selected; change if necessary. Additional rows can be added as needed for further changes.
Transfer Out	Use to indicate an employee's transfer to a different Department / Location SMT combination.	Employee's FTE will display as 0.0 on this action row. This action will also automatically create a vacancy for the position the employee will no longer work. User is responsible for managing the vacancy.	
Transfer Within	Use to indicate an employee's transfer to another position within the same Department / Location SMT combination.	Employee's FTE will display as 0.0 on this action row. A vacancy must exist or be created in which to place the employee; make sure to Fill the employee in a vacant position. This action will also automatically create a vacancy for the position the employee will no longer work. User is responsible for managing the vacancy.	Check for correct endorsement(s) when appropriate.
Unassignment	Use to fully or partially unassign an employee from your site. Enter the amount of FTE the employee will continue to work at this Department/Location in the FTE field, from 0.0 to 0.999.	No vacancy will be created for this action.	HR will either place this employee in another position or the employee will be laid off.

System-Generated Actions			
Action	Definition	Result	Comments
Baseline	This is a system-generated action and is not available for selection.	Displays the filled or vacant position and funding information known in HR when staffing season begins.	This information is static and does not update automatically if changes occur after the SMT is loaded with data.
Leave Backfill	This is a system-generated action and is not available for selection.	This vacant position row is created as a result of an employee going on a Leave of Absence. Position information and vacant FTE that may need backfilling is displayed. User is responsible for managing the vacancy.	In most cases this vacant position will be Filled while the employee is on Leave. If not, place the vacancy in Hold status to retain the FTE for the returning employee. If the school year program will change and the FTE will be used elsewhere, Inactivate the position.
LOA – Working FTE	This is a system-generated action and is not available for selection.	Replaces the Leave of Absence action after the amount of working FTE is entered and the Active row is saved.	This action will only appear in the Filled Positions section.
Request New Limited Term Position	This is a system-generated action and is not available for selection.	This action defaults in when you click the Request New Limited Term Position icon	You are required to enter the Position Information and Funding Source.
Request New Position	This is a system-generated action and is not available for selection.	This action defaults in when you click the Request New Position icon.	You are required to enter the Work Year, FTE, Position Information and Funding Source. Funding Source defaults to General Fund, so be sure to select the correct source.
Updated - New Baseline	This is a system-generated action and is not available for selection.	The most recent changes made on both the SMT and in PeopleSoft are displayed after a nightly automated rollup process occurs.	
Vacancy	This is a system-generated action and is not available for selection.	A Vacancy row is created when an employee Ends Employment, Transfers to a different position Within the same SMT or Transfers Out to a different SMT Department / Location combination.	