# SMT Frequently Asked Questions

## Getting Started

***I can't get logged into PeopleSoft HRMS. What's wrong?***
Your system username and password should allow you to access PeopleSoft. Contact the IT Service Desk at x3375 or itservicedesk@pps.net if you need them to reset your password. If you believe you do not currently have access to PeopleSoft HRMS, click here to download the PeopleSoft Access Request form.

***I have logged into PeopleSoft, but I can't access my SMT. What's wrong?***
Check that you have selected "PPS SMT" from the HRMS Workforce Administration menu inside PeopleSoft. Be sure you entered the correct fiscal year, department and location. Use the lookup (magnifying glass) buttons as necessary. The SMT Status must be 'Open' as well in order to make changes. If you are still not able to access your SMT, please contact the IT Service Desk at x3375 or your HR Staffing Specialist.

***Who can work in and Submit the SMT?***
The Principal or Manager of a department or program and the Principal's Secretary are given access to work in the SMT. Typically, the Administrator, Principal or Manager is the person to Approve & Submit the completed, balanced SMT. Principals or Administrators may request that an assistant (e.g., Vice or Assistant Principal, Secretary) also have the authority to Submit the SMT. To request this updated access for an assistant, contact your HR Staffing Generalist.

***Does the fact that we're using the SMT mean we've gone paperless?***
Not quite. The SMT does not replace the Employee Resignation, Leave of Absence and sometimes Recommendation to Fill paper forms required in Human Resources.

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## Working in the SMT

***There have been times when my HR Staffing contact or Budget Analyst made changes in the SMT for me. Will they provide that service this year?***
Not in most cases. The tool is designed so that Principals and Administrators can take full ownership of their SMTs as they plan and maintain the staffing at their schools. HR staff will enter Fill rows on external hires and internal employee placements in the SMT, as well as Leave of Absence rows and Returns from Leave. We are, of course, always happy to walk you through any particularly complicated scenarios, or investigate any FTE balancing problems.

***Why can't I insert change rows on my SMT or create a new position?***
First, check the status of your SMT: it must be Open to make any changes. If it's Submitted, click on the Open/Edit button (found on both the Staffing Summary and Allocations & Balances pages). Remember to re-Submit when you are finished.
If your SMT is already in Open status, check that you have entered your SMT by both a department and location in combination. You may view your SMT by either a department or a location, but you may only make changes when you have selected both a Department and Location.

***Why did rows I saw yesterday disappear today?***
Effective August 1 each year, an automated "Rollup" process runs nightly, moving filled vacancies up to the Filled Positions section, removing employees whose employment ended or who have transferred out, and updating rows of information into a single new row with an action called "Updated - New Baseline." This process occurs after all central office approvers have indicated not only their approval, but performed any required action external to the SMT.

***Should I see all my staff on my SMT?***
The Staffing Summary page displays staff and positions that use allocated FTE, and the Limited Term Staffing Summary page lists employees who do not use FTE. You can also see both types of employees and positions on the Funding Summary page, grouped by funding source. You may need to click "View All" at the top of each section to see all your staff. To see SPED or ESL staff, you will need to enter the SPED or ESL SMT. You can also run your SMT Staff Roster to see a list of all filled, vacant and limited term positions. For schools, this will include your SPED and ESL positions. If you think an employee is missing, contact your HR representative.

***I hired an employee months ago, but don't see her on the SMT. Why not, and what should I do?***
Most likely the employee was hired after the SMT was loaded for the fiscal year. Add the employee manually by Filling a New or existing Vacant position, and let your HR Staffing contact know. Be sure to select the appropriate fiscal year when opening your SMT; during the spring staffing season you may need to add the employee to both the current and future year SMTs.

***If an employee is taking a leave of absence, do I enter that action on the SMT?***
If the position is to be backfilled, use the "Leave of Absence" action. A "Leave Backfill" position will automatically appear in the vacancy section. Use the Fill Vacancy to identify a long-term fill. If the leave will not be backfilled, do not make any changes on the SMT. In either case, you must submit Leave of Absence paperwork to Human Resources.

***I don't see a vacant position for the new program I'm establishing. What do I do?***
Click the "Request New Position" icon at the bottom of the Staffing Summary page. The workpage you are taken to will require you to identify the Work Days and FTE for the new position. You must then click on the Position Details link and provide additional information about the position. The Funding Source will default to the General Fund, so be sure to select the appropriate Funding Source(s) if this is not correct.

***Why can't I save the Fill Vacancy row I added?***
Schools can only fill vacancies when the SMT is balanced within the funding group being used for the position. If you don't have an alternative funding source to select, they should contact your Budget Analyst or Grant Accountant.

***Can I delete a vacancy I won't use?*** Instead of deleting a vacant position, ADD a row to Inactivate it, and note that the FTE resets to 0.00.

***Can I delete a row if I added it by mistake?***
Yes, for instance a New Position created in error. Never delete rows in between other rows, however; only from the bottom up. Press Apply after each and every row that gets deleted. When you delete a row that automatically created a vacancy, it will delete the vacancy too, even if it's filled.

***How do I enter chartfields for a position?***
Enter the information on the Position Details page in order, so that the chartfield grid can populate correctly on its own after you press Apply.

***I'm having trouble changing the funding on a position. Am I missing something?***
Before making changes to the Chartfield information, ensure you have the correct Funding Sources listed in the Proposed Funding Distribution, and press Apply to update the change(s).

***I got a message saying a funding group is missing. What should I do?***
SMTs cannot be submitted if a funding group is missing. A missing funding group means the weighted FTE is not counting against allocated FTE, and there are a few reasons it can be missing. Ask your Budget Analyst or Grant Accountant for assistance.

***How do I Submit my SMT?***
The SMT is Submitted by clicking on the Approve & Submit button (found on both the Staffing Summary and Allocations & Balances pages). This action lets Budget, HR, Grant Accounting, SPED and ESL know that changes have been made and action is required. It also checks to see that the SMT is balanced within its Funding Groups.

***I am experiencing problems, peculiarities, or slowness in the SMT. What should I do?***
As a first course of action, you can Refresh (F5) the page. Otherwise, you can clear your computer's Internet files; this will force your browser to download new versions of the SMT's web pages. Make sure you are working with current versions of Internet Explorer, Chrome, Firefox or Safari. If you continue to encounter problems even after clearing your Internet files, please contact the IT Service Desk.

## Allocations and Balances

***Where can I find my FTE allocations?***
See the SMT page labeled "Allocations & Balances" to view detailed FTE allocations for General Fund and Title I. Your building's Special Education and ESL allocations can be found by accessing the SMTs for those departments plus your building location—department 5408 for ESL, and department 5414 for SPED – and scrolling down the page to those sections.

***Where are my Foundation and "Other" Grants allocations?*** **These groups** do not have allocations. If you have reasonable confidence that funding for a position will continue in 2016-17, you are not required to unassign the employee. If you know funding for a position is ending, please unassign the employee in the SMT. See the Staffing Handbook for a description of the Grant Staffing Process. For questions regarding the Foundation, call Susan Jeannet at x63755; direct questions concerning Other funding groups to David Shick at x63240.

***I think my SMT should be balanced but it's not. What could be wrong?***
- Verify that you have been given the correct FTE allocations by funding group.
- Use the Funding Summary page to review funding categories, funding groups and assigned FTE. In particular, verify that new positions and employees returning from leaves have been placed in the correct funding groups with accurate FTE.
- On positions eligible for half-weighting, check the chartfield grid on the Position Details page to make sure these have been weighted as expected. All classified represented positions at schools (and select classified non-represented positions) are half-weighted.
- Confirm that a vacancy exists in the amount of FTE for each employee in Leave status on the SMT. Recruit for or Fill those vacancies as appropriate.
- Press the "Recalc Balances" button on the Allocations & Balances page to ensure balances have updated.
- If the SMT still won't balance as you expect it to, contact your Budget Analyst for assistance.

***Can I be out of balance in a funding group and still Submit my SMT?***
- General Fund: Some FTE exchanges are allowable, so not *every* funding group must balance. However, the overall category must be balanced at zero or use less FTE than was allocated in order to Approve and Submit. In some funding groups all the allocated FTE given must be used or the SMT will not Submit.
- Title I: FTE used in each Title I funding group must be less than or equal to the amount allocated; if over in one or the other group, you will not be able to Approve and Submit.
- Special Ed and ESL: These funding groups must balance exactly at zero or you will not be able to Approve and Submit. SPED and ESL balances are only visible on the Allocations & Balances page.
- Foundation and Other Funding Group: The "Other" funding group may contain multiple grants per department, so no allocations can be made. It and the Foundation group will always appear out of balance (in the red), but will not prevent you from Submitting.
- Use the Funding Summary page to review funding categories, funding groups and assigned FTE. In particular, verify that all positions have a funding group, and that new positions and employees returning from leaves are in the correct funding groups with accurate FTE.