



OKLAHOMA STATE DEPARTMENT OF
EDUCATION
— CHAMPION EXCELLENCE —

School Personnel Records

Reporting Information

School Personnel Records

Purpose of the School Personnel Records Section

The School Personnel Records (SPR) office at the Oklahoma State Department of Education (OSDE) is responsible for maintaining the annual certified and support personnel reports, administrators' salary and benefit reports, superintendents' contracts, and approved salary schedules for each school district. Additionally, the office maintains the historical employment data for all certified and support school employees.

The office staff is responsible for reviewing and approving work experience for school employees and updating each teacher's record for all approved teaching experience.

The SPR office reviews the salaries reported by the school districts on each of its teachers to ensure that teachers are paid in accordance with state law. Notices are sent to the school district identifying those teachers who have been underpaid so corrective actions can be taken before a penalty in State Aid is assessed. Additionally, noncertified teachers are monitored and this information is reported to the appropriate persons so corrective actions can be taken.

The SPR office reviews complaints of salary reduction without proportionate reduction in duties per 70 O.S. § 18-114.9 and OAC 210:25-3-4(i), and makes recommendations to the State Board of Education for corrective actions.

The office also responds to requests for information that is subject to the Oklahoma Open Records Act for any of the above information.

Welcome and Certify Screen

The Welcome screen's main function is for the superintendent to **CERTIFY** the Certified Personnel Report, Support Personnel Report, Online School Directory and Local Salary Schedule. The **CERTIFY** function is the superintendent's signature stating that the reports accurately represent the personnel in his or her district.

It is extremely important that the superintendent "**CERTIFY**" the reports each reporting period **even if no changes were made to the reports.** An open lock icon represents an uncertified report; whereas, the closed lock icon represents a report that the superintendent has certified as accurate. You will not be able to **CERTIFY** your Certified or Support Personnel Reports until you have **CERTIFIED** your Online School Directory.

Call School Personnel Records if the **CERTIFY** button is inadvertently selected before the reports are completed. The closed lock will prevent changes to the reports.

At the beginning of each school year, the information below must be completed before starting any portion of the personnel reports:

1. Number of contracted days per school year, and number of hours contracted per school day? (This will be teacher contract days/hours.)
2. Does this district have a Superintendent on contract? If so, upload contract for reporting school year. *You can also upload upcoming year contract if/when approved.*
3. Is this your first year as a superintendent in the state of Oklahoma?
4. Personnel Report contacts. (Provide at least one contact.)

Note: Superintendents can "unlock" reports, between reporting periods, by clicking the "Reset" button on the Welcome screen. (Please always re-certify within 24 hours.)

Specific Instructions for Completing Certified Personnel Reports

Certified Employee (Demographic Information)

Oklahoma Statute 70 O.S. § 6-101.6 requires school districts to report specific pieces of information concerning a certified staff member's salary and benefits to the State Department of Education. The web-based reporting site has been designed to accommodate this law. The following provides specific information for completing the Annual Certified Personnel Reports that are due in October, February, and July, of each year.

Specific requirements:

- Employees who were employed with the district last year, but who are no longer employed, must be removed. To remove an employee, enter a “**Reason For No Return**” code in the appropriate space, tab out of this box and click “Save All Edits” in the employee information box. Do not input any salary, benefit, or days employed information for these people. If the proper “**Reason For No Return**” code has been entered, then these people will not be shown on a print-out of the report.

NOTE: The “**Reason For Leaving**” code will be disabled for the October reports as it should **NOT** be used for employees that did not return from the previous year; however, if an employee returns for the current school year, even if it was just for one day, enter this employee on the October report with the appropriate information. Give this person a “**Reason For Leaving**” code on the February report. (The “**Reason For Leaving**” button will be reactivated for the February and July reports, and the “**Reason For No Return**” button will be deactivated.)

- New employees should be added to the report. Information should be entered for all fields.
- Employees retained by the district should have current information entered for all fields.
- If an employee has changed jobs for the current year, delete the old job and add the new job information. When deleting a job, the fringe benefit information that is tied to that job will also be deleted.
- Each year the State Department of Education will populate the personnel reports with the previous year’s information, excluding the salary and fringe benefit amounts and any Project codes.

Specific field information:

Teacher Number: This is the six-digit number from the certified employee’s Oklahoma teaching credential (lower-left corner of the large frameable certificate or top left of the small detachable copy; **NOT** the red certificate control number that is in the upper right corner of the frame able certificate). **DO NOT** use any number not issued by the State Department of Education.

LName: LAST NAME will populate from the certification file.

FName: FIRST NAME will populate from the certification file.

MI: MIDDLE INITIAL will populate from the certification file.

SSN: The social security number is entered as a nine-digit number with or without dashes. The certification file will compare the SSN entered to the SSN on the certification file for the teacher number that is being entered.

Gender: Select from the drop down menu or type in “F” or “M.”

DOB: Identify the employee’s Date of Birth using the **mm/dd/yyyy** format. The slashes must be a part of the date of birth.

Email Address: Use only a school email address. **Do not** use a personal email address.

Ethnicity: Hispanic/Latino – selected “Yes” or “No.”

Race: Select one or more of the following.

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Pacific Islander
- White

Date Cert Exp: DATE will populate from the certification file.

Note: Teachers with expired certificates will not be processed during the secure upload and will not be allowed to be added manually.

Note: Contact the Teacher Certification office (405-521-3337) for renewal application and/or information.

Note: If using a special E number for noncertified charter school teachers, N/A will appear in the “Date Certificate Expires” box.

Degree Held: The conferred degree will populate from the certification file: 2 = less than 70 semester hours; 3 = greater than 70 semester hours, but no Bachelor’s degree conferred; 4 = Bachelor’s Degree; 5 = Master’s Degree; 6 = Education Specialist or Professional Degree; 7 = Doctorate Degree; and 8 = Doctor of Medicine.

Reason for Leaving: These codes are used for identifying employees who depart the school district prior to the end of the school year. When this situation occurs, you must adjust the employee’s Number of Days employed and Salary/Benefit information in the Salary and Benefit edit screens and then give the person a “Reason for Leaving” code. Remember to save the information by selecting the “Save All Edits” box. If a person was given a “Reason for Leaving” code and then additional changes are needed, first blank out the “Reason for Leaving” information, save those changes, then change the salary and fringe benefit information, and select “Save All Edits.” Finally, reselect the appropriate “Reason for Leaving” code, and “Save All Edits.”

Reason for No Return: These codes are used for identifying employees who depart after the school year ends and do not return the following year. The salary/benefit information MUST be

blank. This option is only available for the October report. It will be deactivated for the February and July reports.

Note: The “Reason For Leaving” option will be disabled for the October reports, but will be reactivated for the February and July reports. Remember, even if the employee only works a minimal amount of time, the appropriate information must be entered on the personnel report.

Experience: These fields show the total years of approved experience for pay purposes and will populate from the teacher’s service record. If the teacher is claiming a different amount of experience, or if the district’s figures do not agree with SPR, please contact the SPR office for information.

Oklahoma: This field reflects the number of years of credible teaching experience with an Oklahoma school.

Out-of-State: Years of credible teaching experience with an accredited out-of-state school district are shown here. (There is a 5 year max for reporting and TRS purposes.)

Military: Years of credible ACTIVE duty military experience are reflected here. Before active duty military experience can be granted, the employee must submit a copy of his/her Form DD 214 to the School Personnel Records Section. (There is a 5 year max for reporting and TRS purposes.)

Note: Military service as a Reservist or National Guard member is not allowed **unless** the person is activated and is on official military orders. For example, the one weekend a month and two-week service during the year are **NOT** allowed for salary step increase purposes.

Important note regarding Out-of-State, Private School, University-level teaching experience and Military Service: Before out-of-state, private school, and/or university-level experience can be granted, the employee must submit a copy of their Proof of Teaching Form and valid teaching credential from the school in which the experience was earned to the School Personnel Records Section. The Form DD 214 must be submitted for military service credit. Oklahoma law limits out-of-state and military experience to five (5) years; however, each school district has the option to pay for additional years of experience. These additional years above the maximum of five (5) granted by the Oklahoma State Department of Education are **NOT** placed on the personnel report.

Total Experience: This field shows the total years of experience for pay purposes. School districts are obligated by law to pay for the number of years shown. However, if an employee has years of experience beyond the amount approved by the State Department of Education, the school district may choose to pay for those additional years. These additional years should **NOT** be entered on the personnel report.

Retired Box: This box should be checked to identify employees who are drawing retirement pay from the Teachers' Retirement System of Oklahoma. These employees may also have a salary cap per TRS.

Note: Normally, this is \$15,000 for a teacher who is under 62 years of age or that has been retired for less than 36 months, and unlimited for teachers who are 62 or older and/or have been retired for over 36 months.

Note: Please contact the Teachers' Retirement System (TRS) of Oklahoma offices at (405) 521-2387 within the Oklahoma City calling area or call TRS toll-free at 1-877-738-6365 within Oklahoma, but outside the Oklahoma City calling area, for each teacher's maximum allowable pay. The telephone number for outside of Oklahoma is (405) 521-2387.

Cooperative Teacher: If the employee is working for two or more school districts, but is only being paid by one school district, then only the school district that pays the person will check this box. Select the box and click "Save all Edits." Scroll to the bottom of the page, open the co-op area, and enter the appropriate information in each field.

Note: Select the appropriate county, district, and site by either entering the appropriate number or by using the drop down menu. Then enter the percentage of time the teacher is teaching for that site number (use two-digit decimals, i.e., .71 and .29), then save this record by selecting "Add Co-Op Record." Continue this process for each district and site. The percentage for the teacher should equal 100 percent (1.0). To edit any co-op information, simply make the needed changes and then select "Save All Edits" twice. The first time you select "Save All Edits" the changed fields will be highlighted. The second time will actually save the information.

Totals (Salary, Fringe, Extra Duty, and Other): As data is entered in the Salary and Benefit edit screens, the figures will automatically be added to the appropriate area.

Total State FTE: As data is entered in the fraction-of-day and days employed fields, the figures will automatically be added here.

Total Federal FTE: As the federal money is being entered the figures will automatically be added here.

New button: This button is used for adding new employees to the report. Additionally, this button will close any information that is currently being shown and will allow the entry of information on a new employee. If this button is selected accidentally and clears the employee, simply reselect the person from the list of employees.

Save or Cancel: Select "Save" to save the entered data to the reports. Cancel will delete all entered information for this individual that has not been previously saved.

Certified Salary Information

Important General Information:

1. Every person **MUST** have a base salary or temporary salary (temporary salaries are not listed on statistical reports).
2. A person **may** have more than one salary record.
3. Each salary record **may** have federal money attached to all or part of it.
4. Job, subject codes and program codes can be found in your Oklahoma Cost Accounting System (OCAS) Manual.
5. When selecting any pay type other than base salaries, code 110, do not enter fraction-of-day, days employed or days contracted.
6. If a job classification for a teacher, code 210, is entered, a subject code and a program code **MUST** be entered.
7. If any job classification other than teacher, code 210, is entered, a subject code cannot be entered.
8. If a Resource Teacher, code 213, is entered, a Special Education program code of 239 is required.
9. Refer to the OCAS manual to determine which job codes can be used with Certified or Support, or for both Certified and Support personnel. The OCAS manual identifies these codes with a “C” for Certified, “S” for Support or “B” for both Certified and Support.
10. Any Certified Personnel with a function code of 1000 on payroll **MUST** have a program code.

Delete box: The delete box is used to delete a record that has incorrect information entered into it; however, the record cannot be deleted without first entering the correct information. Deleting a salary record will also delete any fringe benefit information tied to that particular salary record.

Add Fringe box: The fringe benefit records used last year will be listed and tied to the same salary record, just enter the new amounts. The “Delete” or “Add Fringe” boxes will not appear until a salary record has been added. By selecting the “Add Fringe” box, the fringe benefits will be tied to that particular salary record. To add a fringe benefit, first select “Add Fringe,” then a new screen will appear; add the fringe benefits from this screen.

Site/Job/Subject Fields

Employee Name: The selected employee’s name will be shown on each Salary Record.

Note: Along with the employee’s name, there is a Salary Record Number that is assigned by the State Department of Education for internal operations; **DO NOT** take any action with this number.

Site: Select the site where the person is working by either typing in the appropriate three-digit code or highlighting the site from the drop down menu. DO NOT use districtwide site code “050” for teachers, principals, assistant principals, counselors or librarians.

Job: Select the person’s job classification by either typing in the appropriate three-digit code or highlighting the job from the drop down menu.

Note: Refer to the OCAS manual to determine which job codes can be used with Certified or Support, or for both Certified and Support personnel.

Note: If a teacher job classification, code 210, is selected, a subject code and program code must also be selected. If any job classification other than a 210-teacher is selected, **DO NOT** select a subject code, however, any job code with a function code 1000 on payroll **MUST** have a program code. Any job code that is paid with Title I Federal money (Project Code 511), **MUST** have a program code of either 429 (Disadvantaged/Deprived) or 494 (School Reform).

Note: Superintendent, job classification code 115, and Vocational Agriculture Teachers, code 210, subject codes 2600 and 8000, must have 365 days entered in the contract period. Anything less than 365 will result in an error.

Subject: Select the subject the person is working by either typing in the appropriate four-digit code or highlighting the subject from the drop down menu. Subject codes should be used only when you have a 210-teacher job classification. School Personnel Records only uses **BOLD** subject codes.

Program: All job codes with a function code 1000 on payroll **MUST** have a program code. Select the appropriate program code from the OCAS manual.

Pay Type/Salary Fields

Pay Type: Select the appropriate pay type that is for the job classification that has been entered.

Note: **DO NOT** enter Fraction-of-Day, Days Employed, or Days in Contract when selecting any pay type other than Base Salary, code 110. If entered, these functions will automatically change to zero (0).

(Example 1: Job classification code of 208 - Student Activity Advisor/Nonathletic Coach, would have a pay type of 192 - extra duty for being a class sponsor.)

(Example 2: Job classification code of 115 - Superintendent, may have several pay types; one for base salary, one for auto/allowance/travel, one for professional dues, etc.)

Amount: Enter the dollar amount for the pay type that was chosen. Use whole dollar amounts, **DO NOT** use cents.

FOD/Days Employed/Days Contract Fields

Federal FTE: This area will show the portion of this job that is paid by federal dollars as shown in the information entered for this job. No entries are made by the school district.

FOD (Fraction-of-Day Employed): Fraction of day must be greater than .001 and equal to or less than 1.000. If a full-time employee has more than one base salary, ensure that all base salary records equal a fraction of a day of 1.000; it should **NOT** be greater than 1.000! The following Fraction-of-Day can be used:

Six Period School Day

1/6	=	.167
2/6	=	.333
3/6	=	.500
4/6	=	.667
5/6	=	.833
6/6	=	1.000

Seven Period School Day

1/7	=	.143
2/7	=	.286
3/7	=	.429
4/7	=	.571
5/7	=	.714
6/7	=	.857
7/7	=	1.000

Note: Use caution when entering this data to ensure the decimal point is in the proper place. Many errors have been noted in the past because the full-time employee was identified as working .100 instead of 1.000.

Note: At times, when a person works full-time in a day and has more than one job class, the total Fraction of a Day may not add up to 1.000 by using the above fractions. In these cases, change the Fraction of a Day for one of the entries so the total will add up to 1.000. For example, if a person who works three jobs, each at 2/6 (.333 each) of a day, the total will add up to .999. In this instance, change one of the entries from .333 to .334, thus, resulting in a Fraction of a Day of 1.000 to reflect the employee working a full day.

(Days) Employed: The Days Employed shows the number of days the employee will work or did work in this job during the school year, including professional days.

(Days) Contract: Show the number of days in the employee's full-time contract. The contract days for the Superintendent and/or Vocational Agriculture teacher **MUST** be 365 days. Principals normally work a 220 day or 240 day contract.

At this point, add the salary record. After the salary record is added, input the federal money (project code) and amount and add any fringe records to this salary record; continue to the next salary record, or continue to the next person.

Project Codes/Salary (Federal Money)

Project Code: From the dropdown menu box, select the proper Project Code for the employee.

Project Salary: Enter the amount of salary the employee receives from the selected Federal Program. Round to the nearest whole dollar amount, **DO NOT enter cents**. Select “Add Project Code.” If the employee has income from more than one federal program, then repeat the data entry for the next project code and federal amount. Then select “Add Project Code” again.

Add Project Code box: This box adds the entered federal program information to the employee’s salary information.

Action Buttons

Add Salary Record. Once the data has been entered in the salary boxes, click the “Add Salary Record” button to add that information to the employee’s record.

Save All Edits. If any changes have been made to any part of the existing salary records, click on “Save All Edits” twice. The first time the button is selected the edited fields will be highlighted in yellow. The second time the button is clicked will actually save the information to the employee’s record.

Cancel. This button clears any information that has been entered but not saved.

Fringe Benefit Information

The previous year fringe benefits record will be shown with the dollar amount zeroed out. Either enter an amount and save all edits or delete the fringe record if it is tied to a different salary record. When deleting a salary record, the fringe benefits, that have the same record number, will also be deleted. Remember to check the fringe benefit records closely. When entering the salary information for an employee, you must attach all of the person’s applicable fringe benefits to that salary record. The following are a few guidelines for attaching fringe benefits:

1. Base salary can have any or all fringe benefit codes attached.
2. The state paid Flexible Benefit Allowance (FBA) and/or In-Lieu (IL) is always attached to a base salary and **SHOULD** be reported if applicable.
3. Unused sick leave, district paid salary in lieu of fringe benefits, temporary salary, stipends, and extra-duty pay can have only retirement fringe attached.
4. Disability/Self Insurance, Early Retirement, Teacherage, Professional Dues, Automobile/ Allowance/Travel, and Annuity/CD can have only retirement fringe benefits attached.
5. Flexible Benefit Allowance cannot be paid with any federal money. The monies for FBA are provided by the state.
6. When a person has federal salary attached to any pay type, the fringe benefits may have a proportionate amount attached also.

Salary Record Number/Site/Job

The employee's Salary Record Number, Site, and Job will be populated from the Certified Salary portion of the employee's record. The Salary Record Number is assigned by the State Department of Education for internal purposes; the school district has no actions to take with this number.

Steps for Adding Fringe Benefits to a Salary Record

1. Choose the salary record to which the fringe benefits need to be applied.
2. Click "**Add Fringe**" on the record of choice.
3. Add all fringe benefits that need to be attached to this salary record.
4. Click the "**Select Fringe**" drop down box.
5. Select the appropriate fringe code.
6. Enter the amount of the fringe. Remember to use whole dollars, not cents.
7. Click the "**Add Fringe**" button.
8. If this salary record has federal money attached, add the federal money if the fringe is paid in whole or in part with federal funds. This option will not be available for any Flexible Benefit Allowance/In-Lieu code.
9. If there is no federal money a blue line appears on the left side of the screen.
10. Add another fringe record to this chosen salary record or click "**Finished**."
11. If the salary record has "federal," and the fringe should be paid with federal money, click "**Add Fringe**." Another screen will appear and then select the "**Project Code**." Enter the amount of the fringe benefit that is paid with federal money, then click "**Add Project Code**." If the fringe is not paid with federal money, just click "**Finished**." The original screen will appear. **DO NOT click "Back."**
12. When all of the fringe codes are entered to this salary record, click "**Finished**." The original certified screen will appear. Choose another salary record or review the fringe benefits that have been added by scrolling down the page.

Edits

Information that needs to be changed must be done from the primary page. The primary page is the first page that comes up when a person's name is selected. To make a change, simply change the information that is incorrect and then select "Save All Edits" at the bottom of the appropriate box. The salary information will be populated with the previous year data, except the amounts will be blank. The fringe benefit records will also be populated with the previous year information, with the exception of the amounts. When deleting a salary record all of the fringe records tied to that salary will be deleted.

Other Codes:

Reason for No Return

Complete this box for each teacher who did not return from the last school year. (*This should only be used if no money is received during reporting year.*) Refer to the Reason for Leaving/Reason for No Return codes listed below. This function will only be active for the October reports.

Reason for Leaving

Complete this box for each teacher who has left after their contract began for the current year, but prior to the end of the contract. **Remember to adjust the number of days worked and salary for anyone who left after school started on the February or July reports.** Refer to the Reason for Leaving/Reason for No Return codes (listed below). This function will be inactivated for the October reports. This function will only be activated on the February and July Reports. Salary and benefit information must be entered for these employees.

Reason for No Return and Reason for Leaving Codes:

01 = Retiring	09 = Leave of Absence
02 = Another School in State	10 = Maternity/Childbirth/Homemaking
03 = Work Out-of-State	11 = Moving due to Spouse's Employment
04 = Other Employment	12 = Reduction in Force
05 = Health Reasons	13 = Displaced Due to Consolidation or Annexation
06 = Marriage	14 = Terminated
07 = Personal Reasons	00 = No Reason Given
08 = Deceased	

Steps for Adding a New Person to the Certified Personnel Report

1. Open the Certified Personnel roster by selecting the “Certified Personnel” Tab from the top menu bar.
2. Select “Open” in the Certified Employee screen.
3. Select “New” at the bottom left corner of the employee information box.
4. Enter the appropriate demographic information:
 - Teacher Number (from the bottom of the teaching certificate issued by the OSDE).
 - Social Security Number (SSN); Race (select Yes or No); Ethnicity (Select one or more); Gender (drop down menu); Date of Birth (mm/dd/yyyy).
 - E-mail Address: Use district given email only. No personal email accounts to be used.
 - Last Name; First Name; Middle Initial, Date Certificate Expires, Degree and Experience will populate from the certification file.
 - Select appropriate boxes for this teacher: Retired, Residency Year, or Co-Op

- District will not need to provide any information for NBCT (National Board Certified Teacher). If teacher holds NBCT certificate, data will populate from SDE records.
 - **Select “Save All Edits.”**
 - Once the salary and benefit information has been entered, the totals will be shown on this screen.
5. Enter Salary Information
- Click in the site box and enter the site code or use the dropdown option to choose a site code. Use the appropriate code for each site where the employee works. Do not assign a “districtwide” code of 050 to employees who work at more than one site UNLESS the employee’s primary office is located at the central office or other service center facility. Examples of a districtwide employee could be a Speech-Language Pathologist or Director.
 - Do not use districtwide site code “050,” for teachers, principals, assistant principals, counselors or librarians.
 - Enter the appropriate job code (refer to the OCAS job classifications), you can also use the drop down menu option.
 - If a 210 (teacher) job code is entered, a subject code must be entered. If a job code is entered with a function 1000, a program code must be entered (refer to the OCAS job and program codes). **Do not enter a subject code with any other job code.**
 - Enter the pay type (drop down menu option). Enter a base salary or temporary salary before entering any other pay type.
 - Enter amount. **Do not use cents**, round to the nearest whole dollar.
 - Enter “FOD” (Fraction of day employed).
 - Enter “Emp” (Days an Employee will actually work/ be on contract for current year).
 - Enter “Con” (Days in full contract for position). Superintendents and Vocational Agriculture teachers must be 365 days.
 - Click “Add Salary Record.”
 - Repeat the above steps until all of the salary records have been added.
 - After all salary records are added, enter the project code (drop down menu option) and the amount of the federal money that is being paid. Then click “Add Project Code.” Please keep in mind, the project code amount being entered is the amount of the salary record that is being paid with federal money. **Do not** include the district burden amounts of federal money on the School Personnel Reports.
6. Enter Fringe Benefit Information
- Choose the appropriate salary record. Remember all fringe benefits must be tied to the base salary record(s) with the exception of retirement.
 - Look to the left of the chosen salary record and click on the small box “Add Fringe.”
 - An additional screen will come up.
 - Click on the drop down menu option “Select Fringe,” choose the fringe code.
 - Tab to the next blank box and enter the dollar amount of the selected fringe code. **Do not use cents** (round to the nearest whole dollar).
 - Click “Add Fringe,” a blue line will appear to the left showing the fringe benefit that was just added.
 - Repeat the above steps until all fringes have been entered that need to be tied to this salary record. Remember, if the base salary has been split between two or more jobs, the

retirement must also be split accordingly.

- Click “Finished.” The previous screen will appear. Then choose another salary record and repeat the above steps.
- If the chosen salary record is being paid with federal money, then an additional step to add any federal money to the fringes will be required. When the additional screen comes up, choose the project code from the drop down menu option, enter the amount that is being paid with federal money, click “Add Project Code” and then click “Finished.” The original fringe benefit screen will appear. Remember, the Flexible Benefit Allowance/In-Lieu is paid by the state, so it **can not** be reported as federal money.

Steps for Changing a Person’s Information on the Certified Personnel Report

A person’s Certified record is broken down into four sections: (a) Employee information, (b) Certified salary, (c) Fringe and (d) Certified Co-Op. When making changes, remember to use the “Save All Edits” at the bottom of the section in which changes are being made.

1. Highlight the box in the section that is to be changed.
2. Enter the correction that needs to be made.
3. Tab out of that box.
4. Highlight any other box in that section that is to be changed and repeat steps two and three.
5. When all changes to this section have been made click “Save All Edits” at the bottom of that section.
6. Repeat the above five steps to each section that needs to be changed.
7. Remember, when deleting a salary record any fringe benefits that are attached to that salary record will also be deleted.

Specific Instructions for Completing Support Personnel Reports

Support Employee (Demographic Information)

New Button: This button will close any information that is currently being shown and will allow the entry of information on a new employee.

SSN: The Social Security Number is entered as a nine-digit number with or without dashes.

LName: Type in the employee's LAST NAME.

FName: Type in the employee's FIRST NAME.

MI: Type in the employee's MIDDLE INITIAL (Note: If the employee does not have a middle initial, this area can be left blank.)

Gender: Select from the drop down menu or type in "F" or "M."

Email Address: **Use only school email addresses.** Leave this box blank for any support employee that is not assigned a school email address.

Ethnicity: Hispanic/Latino – selected "Yes" or "No."

Race: Select one or more of the following.

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Pacific Islander
- White

Reason for Leaving: These codes are used for identifying employees who depart the school district prior to the end of the school year. When this situation occurs, adjust the employee's "Number of Days Per Year" (days employed), the salary and fringe information in the "Salary" and "Fringe" edit screens, and select the appropriate reason for leaving code. This function will only be available on the February and July reports.

Reason for No Return: These codes are used for identifying employees that depart after the school year ends and do not return the following year. **The salary/benefit information MUST be blank.** This option is only available for the October report. It will be deactivated for the February and July reports. If the employee leaves after the beginning of their contract and have worked at least one hour, then give them a "Reason for Leaving" code in February or July.

Save or Cancel: Select “Save All Edits” to save the data that has been entered in the employee information section of the report. The “Cancel” button will delete all entered information for this individual.

Delete: There is no longer a delete button to clear a support person that did not return from the previous year. Please give these employees a “Reason for No Return” code.

Salary Edit Boxes

Important General Information:

- Every person **MUST** have a base salary or temporary salary (temporary salaries are not listed on any statistical reports).
- A person may have more than one salary record.
- Each salary record may be paid by federal funds.
- All codes can be found in the Financial Accounting OCAS Manual.

Specific Information:

Site: Select the site where the person is working by either typing in the appropriate three-digit code or highlighting the site from the drop down menu.

Job: Select the job that the person is working by either typing in the appropriate three-digit code or highlighting the job from the drop down menu.

Pay Type: Select the pay type that is appropriate for the job classification.

Salary: Enter the dollar amount. Please use whole dollar amounts, no cents.

Hours per Day: This area is for reporting the number of hours the employee is expected to work each scheduled work day. Multiple entries are required if the person works more than one job.

Days per Year: This area is for reporting the number of days during the school year this employee is anticipated to work for each specific job. Multiple entries are required if the person works more than one job.

Formula for each job reported:

Hours Per Day in this job [x] **Days Per Year** in this job = **Hours Per Year** for this job

HPD [x] DPY = HPY

HPY [x] hourly salary = Salary Per Year for this job

Overtime: HPDOvertime [x] DPYOvertime = HPYOvertime

HPYO (x) (1.5 [x] hourly wage) = Overtime Pay

Contract Days: This area is for reporting the total number of days contracted to work during the entire school year in each position.

Select “Add Salary Record.” If that person is paid wholly or partially with federal funds, continue by entering the appropriate project code(s) and salary amount(s) and select “Add Project Code.”

Fringe Benefit Information

The previous year fringe benefits records will be shown with the dollar amount zeroed out. Either enter an amount and save all edits or delete the fringe record if it is tied to a different salary record. If a salary record is deleted, the fringe benefits with the same record number will also be deleted. When entering the salary information for an employee, attach all of the person’s applicable fringe benefits to that salary record. The following are a few guidelines for attaching fringe benefits:

1. Base salary can have any or all fringe benefit codes attached.
2. The state paid Flexible Benefit Allowance (FBA)/In-Lieu (IL) is always attached to a base salary and **SHOULD** be reported if applicable.
3. Unused sick leave, district paid salary in lieu of fringe benefits, temporary salary, stipends, and extra duty pay can only have retirement fringe benefits attached to them.
4. Disability/Self Insurance, Early Retirement, Teacherage, Professional Dues, Automobile/ Allowance/Travel, and Annuity/CD can only have retirement fringe benefits attached.
5. Flexible Benefit Allowance/In-Lieu cannot be paid with any federal money. The monies for FBA/IL are provided by the state.
6. When a person has federal salary attached to any pay type, the fringe benefits should have a proportionate amount attached also.

Salary Record Number/Site/Job

The employee’s Salary Record Number, Site, and Job will be populated from the Support Salary portion of the employee’s record. The Salary Record Number is assigned by the State Department of Education for internal purposes; the school district has no actions to take with this number.

Steps for Adding Fringe Benefits to a Salary Record

1. Choose the salary record to which the fringe benefit needs to be applied.
2. Click “**Add Fringe**” on the record of choice.
3. Add all fringe benefits that need to be attached to this salary record.
4. Click the “**Select Fringe**” drop down box.
5. Select the appropriate fringe code.
6. Enter the amount of the fringe. Remember to use whole dollars, not cents.
7. Click the “**Add Fringe**” button.
8. If this salary record has federal money attached, add the federal money if the fringe is paid in whole or in part with federal funds. This option will not be available for any Flexible Benefit Allowance/In-Lieu code.
9. If there is no federal money, a blue line will appear on the left side of the screen.
10. Add another fringe record to this chosen salary record or click “**Finished.**”
11. If the salary record has a “project code,” and the fringe benefit should be paid with federal money, click “**Add Fringe.**” Another screen will appear and then select the “**Project Code.**” Enter the amount of the fringe benefit that is paid with federal money; click “**Add Project Code.**” If the fringe benefit is not paid with federal money, just click “**Finished.**” **DO NOT click “Back.”**
12. When all of the fringe codes have been entered to this salary record, click “**Finished.**” The original support screen will appear. Choose another salary record or review the fringe benefits that have added by scrolling down the page.

Edits

Information that needs to be changed must be done from the primary page. The primary page is the first page that comes up when a person’s name is selected. To make a change, simply change the information that is incorrect. Then select “Save All Edits” at the bottom of the appropriate box. The salary information will be populated with the previous year data, except that the amounts will be zeroed out. The fringe benefit records will also be populated with the previous year information, with the exception of the amounts. When deleting a salary record, all of the fringe records tied to that salary will also be deleted.

Steps for Adding a New Person to the Support Personnel Report

1. Open the Support Staff roster by selecting the “Support Staff” Tab from the top menu bar.
2. Select “Open” in the Support Employee screen.
3. Select “New” at the bottom of the employee information box.
4. Enter the appropriate demographic information:
 - Social Security Number (SSN)
 - Last Name; First Name; Middle Initial
 - Gender (drop down menu)
 - E-mail Address (Only include if employee has district provided email.)
 - Ethnicity – Hispanic/Latino (select Yes or No)
 - Race (select one or more)
 - RFL (reason for leaving) and RFNR (reason for not returning) are not used on new personnel
 - Select “Save All Edits”
5. Enter Salary Information:
 - Click in the site box and enter the site code or use the drop down menu to choose a site code.
 - Enter the appropriate job code (refer to the OCAS job classifications), you can also use the drop down menu.
 - Enter the pay type (drop down menu). Enter a base salary or temporary salary before entering any other pay type.
 - Enter amount. **Do not use cents**, round to the nearest whole dollar.
 - Enter “Hours Per Day” (Hours an employee will work per day at this job).
 - Enter “Days Per Year” (Days an employee will actually work/be on contract for current year).
 - Enter “Contracted Days” (Days in full contract for position). “Contracted Days” cannot be more than 265 days.
 - Click “Add Salary Record.”
 - Repeat the above steps until all of the salary records have been added.
 - After all salary records are added, enter the project code (drop down menu) and the amount of the federal money that is being paid. Then click “Add Project Code.” Please keep in mind the amount of federal money being entered is the amount of the salary record that is being paid with federal money.
6. Enter Fringe Benefit Information
 - Choose a salary record to add the fringe benefits to. Remember all fringes must be tied to the base salary record(s) with the exception of retirement.
 - Look to the left of the chosen salary record and click on the small box that says “Add Fringe.”
 - An additional screen will appear.
 - Click on the dropdown menu that says “Select Fringe,” choose your fringe code.
 - Tab to the next blank box and enter the dollar amount of the selected fringe code. **Do not use cents** (round to the nearest whole dollar).
 - Click “Add Fringe,” a blue line will appear to the left, showing the fringe benefit that was just added.

- Repeat the above three steps until all fringe benefits have been entered that need to be tied to this salary record. Remember, if the base salary has been split between two or more jobs, the retirement must also be split accordingly.
- Click “Finished.” The previous screen will appear. Choose another salary record and repeat the above steps.
- If the salary record that has been chosen is being paid with federal money, an additional step to add any federal money to the fringe benefits will be required. When the additional screen comes up, choose the project code from the dropdown menu, enter the amount that is being paid with federal money, click “Add Project Code” and then click “Finished.” The original fringe benefit screen will appear. Remember, the Flexible Benefit allowance is paid by the state, so it **cannot** be reported as federal money.

Steps for Changing a Person's Information on the Support Personnel Report

A person's Support record is broken down into three sections: (a) Support Employee, (b) Support salary, and (c) Fringe. When making changes, remember to use the "Save All Edits" at the bottom of the section in which the changes are being made.

1. Highlight the box in the section that changes need to be made.
2. Enter the correction that needs to be made.
3. Tab out of that box.
4. Highlight any other box in that section that changes need to be made and repeat steps two and three.
5. When all changes to this section have been made, click "Save All Edits" at the bottom of that section.
6. Repeat the above five steps to each section that needs to be changed.
7. Remember, when deleting a salary record, any fringe benefits that are attached to that salary record will also be deleted.

Salary Schedule

Salary figures must be rounded to whole dollars, **DO NOT** enter cents.

Every salary cell for Years of Experience (0-25 years), and for degree level (Bachelor's, National Board Certified Teachers with Bachelor's, Master's, National Board Certified Teachers with Master's and Doctorate), must have a figure entered into it or an error message will appear. The optional fields for "Years of Experience for Over 25 Years" do not have to be completed. Salary schedules for Degree + hours can be added by checking the applicable boxes above the schedule. Indicate the "+ hrs" used for each schedule once the column is added into the schedule.

If the district has adopted the State Minimum Salary Schedule as its approved salary schedule, simply select the box for State Minimum. The fields will not populate, but the report will be sent to the SPR office.

As a shortcut, select the box for "Get State Minimum Schedule," which will populate the report with the state minimum for years of experience and Bachelor's, Master's, and Doctorate degree levels. Make any changes to the salary schedule that are needed. Additionally, if the district pays at the state minimum schedule, but has salary increments for 26 years or more, or has pay levels for in-between degree levels such as Bachelor's + 15 semester hours, it may be easier to populate the form with the Minimum Salary Schedule and then add specific information to the other cells. The same would be true in instances where most of the pay levels are at state minimum except for a few.

If the salary schedule has not changed from the previous year, select the "Get Previous Year's Schedule" button. This will cause the system to populate the current year schedule with the previous year information.

The superintendent must **CERTIFY** the salary schedules to make them official.

Salary schedules are to be submitted no later than November 15 each school year.

Note: It is recommended to "SAVE" the work periodically, and do not leave the screen unattended for more than a few minutes at a time; otherwise, the webpage may "time-out" and all previously entered information will be lost.

Print Reports

Note: “ADOBE ACROBAT READER” must be downloaded onto the computer before any report can be printed. Adobe Acrobat Reader can be obtained free of charge at <www.adobe.com>

General Instructions:

1. Select the “Print Reports” tab, located at the top of the Welcome screen.
2. Select the report to be printed.
3. Select the proper “Document Format” (PDF is recommended).
4. Select “Print.” (Select “New Window” to have report open in new browser window.)
5. Remember, all of the edit check reports update on the hour.

School District Reporting Site

“School Personnel Reports – Secure Upload Application”

The box in the upper right hand corner of this application indicates the fiscal year to be uploaded. The box will list current fiscal year by default. If previous years files need to be uploaded, select that year from the drop down box and click “Select”. Your County/District code has already been selected for you.

Upload File Tab

1. Select one of these files from the drop down list.
 - Certified Header
 - Certified Salary
 - Certified Benefits
 - Support Header
 - Support Salary
 - Support Benefits
2. Click “Browse”. This will open a dialogue box to select the file from the computer.
3. Click “Upload File”. This will save the file on the web. A status record will be saved, indicating which file has been uploaded as well as the date.
4. Once the file has been uploaded, proceed to the “Process File” tab.

Process File Tab

1. Select one of the files from the drop down list.
2. Click the “Process File” button. Depending on the server traffic, this process could take a while, so please be patient.
3. Results of the edit checks will be displayed in the text box. If errors were encountered, they will display, and the File Upload Status Summary (on the Upload File tab) will be updated to reflect an **error** status. If the file did not contain errors, a **valid** status will be reflected on the File Upload Status Summary.
4. To save any error messages, highlight the contents of the textbox, copy them (ctrl-c or right click, copy) and paste them (ctrl-v or right click paste) into a text editor, such as Notepad, WordPad, or Microsoft Word.

Processing Salary Record Numbers (SRNs)

1. After the Header, Salary and Benefits files have been uploaded, and BOTH the Salary and Benefits files are marked as valid, the SRNs can be processed.
2. Any error messages will display in the results textbox. The status results of this edit check will display in the SRN Status Summary on the Upload File tab.
3. When all six files and the 2 (two) SRN checks have a **valid** status, proceed to the “Move File to Database” tab.

Move File to Database Tab

- When all six files and the 2 (two) SRN checks have been completed and have a **valid** status displayed on the “Upload File” tab, the files are ready to be uploaded to the State’s database.
- To update Certified personnel data on the State’s database click on the button named “Move Certified records to Database”
- To update Support personnel data on the State’s database click on the button named “Move Support records to Database”

Upon Completion

- Log out of the Secure Upload Application and go the current school year School Personnel Reports web application and run the edit check reports. Any errors that are found at this point can be corrected online using the School Personnel web application.
- If you encounter problems with the upload process, please contact you will need to contact your payroll vendor.

Notes

- If the uploaded files have errors, *repair* the errors in the file, and upload the file again. The old version of the file will automatically be replaced with the latest upload.
- If a file is re-uploaded, it will reset all the previous status codes.
- If a file is re-uploaded, it will wipe out any changes that have been made by using the online School Personnel web application.