What's New for TRS
2016

Preliminary Processes

If you do not have security access to any of these tasks, be sure to contact your Business Office Administrator and/or PEIMS Coordinator to request the following processes to be completed.

1. Create 2016-2017 Instructional Period
    a. Admin > District > Instr. Period

2. Create 2016-2017 General Ledger
    a. Finance > General Ledger > Ledger Manager

3. Create 2016-2017 Pay Periods
    a. Finance > Payroll > Pay Schedules > Calendars

4. On employee's positions, if there is a temporary position, which will not need to be rolled forward to the next year, go to that position and select "Do not promote this position."
    a. Finance > HR > Staff Manager
    b. Select to edit the employee
    c. Select the Payroll tab
    d. Select the Position – select to edit the Position
    e. In the Scheduled Payments Section, select "Do not promote this position."

5. Terminate non-returning employees
6. Update Pay Scales, if applicable
7. Update Leave Policies

1. **Create Calendars for 2016-2017 on the Contract Types:** *Contract Types must be linked to a calendar, which is indicated below, containing the # of days per month in a given school year the employees are expected to work for TRS reporting purposes.*

- Go to Finance > HR > Organization > Contract Types
- Select to [icon] edit each Contract Type

- Select the Calendar tab
- Select to [icon] edit the 2016-2017 School Year calendar

- Enter the # of days worked for each Month for this Contract Type
  - Be sure the total # of days work equal the Contract Days. If the days do not match, the user will receive an error.

Additional Errors: Property: *2016-2017 School Year Calendar*
*Work days must equal 187 but were 186.00

[Save] [Cancel]

- Select Save
- Select Return to List and repeat for each Contract Type

| General | Calendar |

Edit: 10 1/2 Month - 196 Days   Return to list

Default Work Days 2016-2017 School Year

September*	22.00
October*	21.00
November*	22.00
December*	22.00
January*	22.00
Febrary*	20.00
March*	23.00
April*	20.00
May*	23.00
June*	22.00
July*	21.00
August*	23.00

Enter the # of days expected to work each month for this Contract Type.
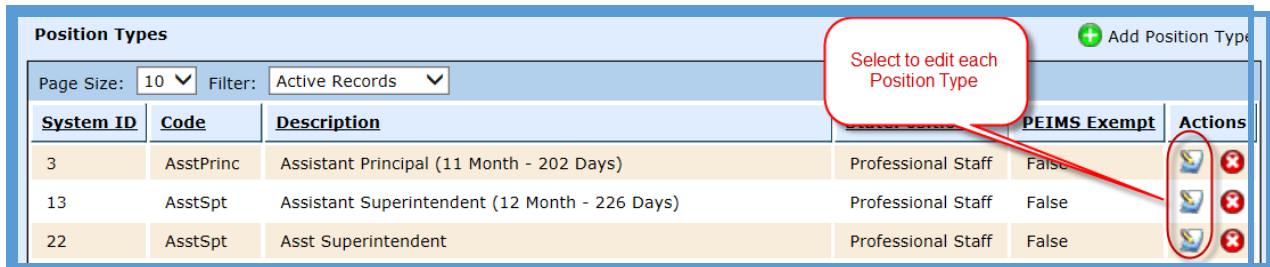
Select Save

[Save] [Cancel]

2. **Enter Hours Per Day on the Position Types**: *Position Types manage default hours per Contract Type for TRS reporting. There may be multiple Position Types set up in WebSmart based on the # of Contract Days. For example, if your school, has 3 counselor positions, but they each have a different number of contract days, you may see something similar to this in the database:*
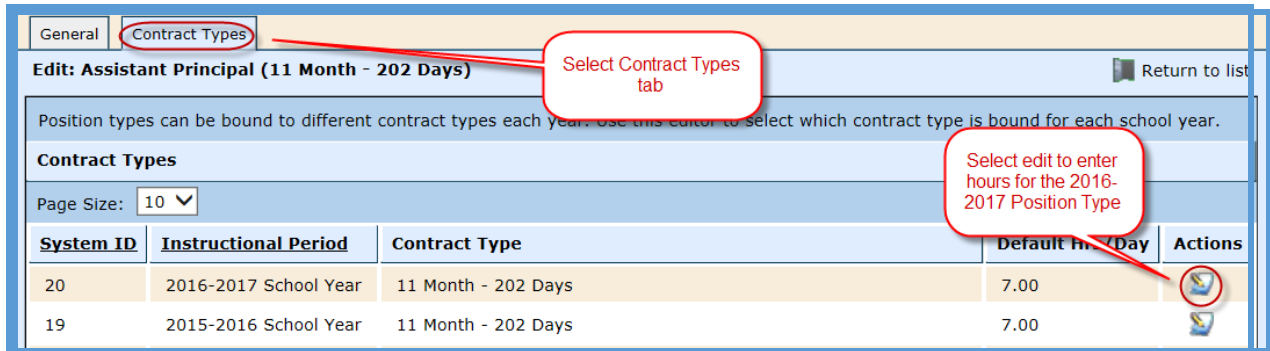
   a. Nurse/Counselor (10 ½ Month – 196 Days)
   b. Nurse/Counselor (10 ½ Month – 197 Days)
   c. Nurse/Counselor (10 ½ Month – 202 Days)

- Go to Finance > HR > Organization > Position Types
- Select to 📝 edit each Position Type

- Select the Contract Types tab
- Select to 📝 edit each Position Type

- Enter the # of hours per day the employee is scheduled to work
- Select Save
- Select Return to List and repeat for each Position Type

3. Promote Contract Types – *This utility allows a user to promote multiple Contract Type calendars to the selected instructional period without having to manage each individual type.*

- **Tabs** – select the Contract Types tab
- **Target Period** – Select 2016-2017 School Year
- **Calendar for 2016-2017 School Year** –
  o The calendar for the Contract Types have already been created in the previous step and will pull into this tab.
  o If a calendar has not been set up for a particular Contract Type, once the Promote button is clicked, this process will create a calendar from a previous year. **All calendars will need to be created this year.**
- Select **Promote**

If you see a check box to the right of the Contract Type (under the Calendar for 2016-2017 School Year), that means a calendar has not been associated to that particular contract type. In order to move forward, you need to do one of the following two processes.

- Check the check box, which will create a calendar from the previous year and will be available for the user to edit. (Suggested)
- Go back to the Contract Type and add the calendar.

Note: *The user may promote multiple times. The software will only update the Contract Types, which have not been previously updated.*

4. **Promote Position Types** – *This utility allows a user to promote multiple position types to the selected instructional period without having to manage individual position types.*
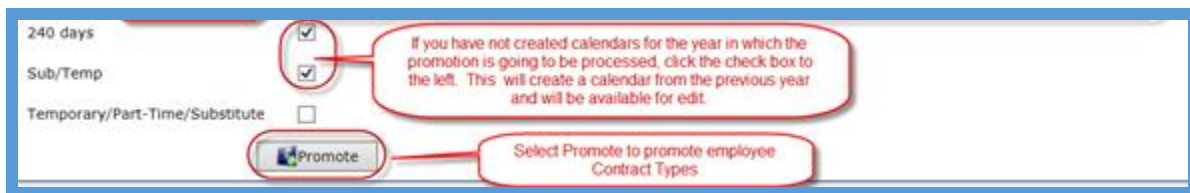
- **Tabs** – select the Position Types tab
- **Target Period** – Select 2016-2017 School Year
- **Contract Type for 2016-2017 School Year** –
  - The hours per day for the Position Types have already been created in the previous step and will pull into this tab.
  - If the hours per day have not been set up for a particular Position Type, once the Promote button is clicked, this process will create a Contract Type from a previous year.
- Select **Promote**

Contract Promotion   Target Period: 2016-2017 School Year ⌄

This utility allows a user to promote multiple position types to the selected instructional period without having to manage each individual position type.

Position Type	Contract Type for 2016-2017 School Year
Assistant Principal (11 Month – 202 Days)	11 Month – 202 Days
Assistant Superintendent (12 Month – 226 Days)	12 Month – 226 Days
Asst Superintendent	10 1/2 Month – 196 Days
Ath Director (12 Month – 226 Days)	12 Month – 226 Days
Business Office (12 Mnth July – 239 Day)	12 Mnth July – 239 Days
Business Office (12 Month – 226 Days)	12 Month – 226 Days
Classroom Aide (10 1/2 Month – 197 D...)	10 1/2 Month – 197 Day
Classroom Aide (10 Month – 187 Days)	10 Month – 187 Days
Counselor (10 1/2 Month – 196 Days)	Default ⌄
Counselor (10 1/2 Month – 197 D...)	Default ⌄
Counselor (10 Month – 187 Days)	10 1/2 Month – 197 Day ⌄
Counselor (11 Month – 202 Days)	Default ⌄
Counselor (11 Month – 205 Days)	11 Month – 206 Days ⌄

These Contract Types are already associated to the Positions Types from the set up in the previous steps.

Default means the calendar will link the Position Type to last year's available Contract Type according to those days.

If the Position Type is changing days, the user may select a new Contract Type to associate to the Position Type such as moving from 205 to 206 days.

Note: *The user may promote multiple times. The software will only update the Contract Types, which have not been previously updated.*

5. **Promote Contracts**: *This utility allows a user to promote employment contracts from the selected period into a subsequent period. The utility can be run multiple times. If an employee has an employment contract in the period selected, it will be ignored.*

- **Tabs** – select the Contracts tab
- **Target Period** – Select 2016-2017 School Year

Contract Promotion   Select Contracts tab   Select new year   Target Period: 2016-2017 School Year ⌄

This utility allows a user to promote employment contracts from the selected period into subsequent period. The utility can be run multiple times and will promote any "un-promoted" contracts it finds. If an employee has an employment contract in the period selected, they will be ignored.

Contracts will be promoted into the selected period from the period labeled: **2015-2016 School Year**

- **Contract Type/Position Type** – The information is listed in categories by Contract Type and then each Position Type is listed under the Contract Type
- **Contract Begin** – Enter the Contract Begin dates for each Contract/Position Type
- **Contract End** – Enter the Contract End dates for each Contract/Position Type. Be sure to watch the dates carefully.

Contract Type / Position Type	Contract Begin	Contract End
10 1/2 Month - 196 Days		
Counselor (10 1/2 Month - 1...	1/2016	06/13/2017
10 1/2 Month - 197 Day		
Classroom Aide (10 1/2 Mon...	1/2016	06/15/2017
Counselor (10 1/2 Month - 1...	1/2016	06/30/2017
10 Month - 187 Days		
Classroom Aide (10 Month - 187 Days)	8/17/2016	6/5/2017
Food Service (10 Month - 187 Days)	8/17/2016	6/5/2017
Librarian (10 Month - 187 Days)	8/17/2016	6/5/2017
Librarian Aide (10 Month - 187 Days)	8/17/2016	6/5/2017

For each Contract Type there are a sub set of Position Types.

Enter the Contract Begin and End Dates for each of the Position Types.

- **Salary Increase** – If the board has approved a salary increase for certain Contract/Position Types, the increase can be selected in this section as a % increase or Fixed Amount and will automatically calculate the payroll increase during the promotion process on the position.
- **Hourly Increase** – If the board has approved an hourly increase for certain Contract/Position Types, the % increase or Fixed Amount can be selected in this section and will automatically calculate the payroll increase during the promotion process on the position.
- **Daily Increase** – If the board has approved a daily increase for certain Contract/Position Types, the % increase or Fixed Amount can be selected in this section and will automatically calculate the payroll increase during the promotion process on the position.

- To the right of the increases, you will see the # of contracts the software is expected to promote for the new school year.

- Select **Promote**

Note: *This process rolls leave balances forward.*

After Promotion Processes

After the contracts have been promoted for next year, be sure to do the following:
- Verify contracts for next year, update if necessary
- Verify positions for next year, update if necessary
- Run the Employee Wages Report and verify data
- Verify updated leave balances
- Update individual employee calendars (see more details below)
- Update the number of days per week the employee works, if applicable. The default is set to 5 days per week. (see more details below)

Update Individual Employee Calendars

1. Go to Finance > HR > Staff Manager
2. Edit the employee
3. Click on the Payroll tab
4. Click on the Position
5. If you need to override the default calendar previously set up on the Contract Types, select the 🗓 Calendar icon under Actions

6. To customize the employee's calendar, select "TRUE – Provide Custom Calendar"

7. At this point, the user can adjust the Scheduled Hrs/Day and/or the Calendar Days per Month for this individual employee only. These updated days will be reported to TRS.
8. Select Save.

Scheduled Work Days

Override Default*	TRUE - Provide Custom Calendar
Scheduled Hrs/Day*	
September*	22.00
October*	22.00
November*	21.00
December*	13.00
January*	21.00
Febrary*	21.00
March*	18.00
April*	21.00
May*	22.00
June*	5.00
July*	23.00
August*	21.00

At this point, the user can adjust the Scheduled Hours Per Day and the Calendar Days per Month and select Save.

Save   Cancel

Update the number of days per week the employee works

1. Go to Finance > HR > Staff Manager
2. Edit the employee
3. Click on the Payroll tab
4. Click on the Position
5. The number of days per week the employee works defaults to 5 days per week. If the user needs to edit the number of days for an individual employee, select the 🖉 Edit icon under Actions