How to Add or Edit Historical Service Records



Historical service record information for credible service at the district may be entered in WebSmart to allow printing of one official service record. All data should be verified by district HR personnel.

### Step 1 – Unlock Instructional Periods

***Admin*** *> District > Instructional Periods*

* Select Closed Periods from the Filter drop down menu.
* Click  to Unlock the desired Instructional Period.
* Return to Open Periods from the Filter drop down menu.
* Verify that the desired years are available. If not, Add an Instructional Period.
* To Add an Instructional Period:
	+ - Begin Date = First date of the fiscal year
		- End Date = Last date of the fiscal year
		- School Start Window = last Friday in September for PEIMS purposes.
		- As of Date = last Friday of October for PEIMS purposes.
		- Attendance Model = Semester Reporting Length (from drop down menu)
		- Save/Create Instructional Period

### Step 2 – Update Contract Types

***Finance*** *> HR > Organization > Contract Types*

* Change Filter to Disabled Records using the drop-down menu.
* Identify and activate the necessary Contract Types (green actions arrow).
* Change Filter to Active Records from the drop-down menu.

### Step 3 – Update Position Types

***Finance*** *> HR > Organization > Position Types*

* Change Filter to Disabled Records using the drop down menu.
* Identify and activate the necessary periods (green action arrow).
* Select Active Records from the drop down menu.
* Click Edit Icon of the Position desired.
* Select the Contract Type Tab.
* Locate the instructional period and verify that a contract type has been configured. If not edit instructional period and select contract type, enter default hours and Save.

### Step 4 – Locate Employee & Update Service Record

***Finance*** *> HR > Staff Manager*

* Click on Add/Find Staff to Locate Employee
* Edit Employee Record
* Select Payroll Tab
* Select Employment Contracts
	+ Add Contract

Enter the information on the Contract. Items with \* print on service record.

* + **\*Placement Type** – Select FTE or Contract
	+ **\*District** – Select the District
	+ **\*Instructional Period** – Select the appropriate Instructional Period
	+ **\*Contract Days** – Enter the # of Contract Days the employee worked that Instructional Period
	+ **\*Contract Begin** – Enter the employee’s begin date for the Instructional Period
	+ **\*Contract End** – Enter the employee’s end date for the Instructional Period
	+ **Status** – Leave status as Active
	+ **\*Primary Role** – Select the Primary Role for the employee. The Service Record Code on the Primary Role will be printed on the employee’s service record.
	+ **\*Percent of Day** – Enter the % of day the employee worked
	+ **Pay Step** – If the district uses a pay step, enter the Pay Step (Note: does not print on Service Record so zero is OK).
	+ **Local Experience** – Look at previous service records, and enter the appropriate years of local experience
	+ **\*Prof. Experience** – Look at previous service records, and enter the appropriate years of professional experience
	+ **ACA Offer** – Select 1A – Qualifying offer if the employee was offered health insurance. Select 1H – No offer of coverage if the employee was not offered health insurance coverage at all. Note: Does not print on Service Record.
	+ **Statutory Tax Status** – Complete Tax Status as pertaines to the employee and the Primary Role they held for the Instrucitonal period you are adding.
	+ Save the Contract
* Verify a Leave Policy Election has been selected. *Note: State Personal and State Sick Leave are the only leave types to be included on an official service record. If you do not participate in State leave you may skip this step.*
	+ Select the HR Tab from the employee’s record
	+ Select Leave Policy Elections
	+ Select Change Election
	+ Make necessary changes
	+ Save/Complete
* Update Leave for the correct Instructional Period. *Note: edit the oldest school year available first as balances will roll forward.)*
* Select Initialize Leave Balance
* Select the Leave Type
* Edit the Leave used to get the actual year-end balance

### Step 5 – Run Report

* Select the Reports Tab
* Select Service Records
	+ School Year: Employees most recent school year or All
	+ Exclude Incomplete: Check box to exclude the current year unless employee is terminating before year end.
* Select Run Report

### Step 6 - Closing the Process

* Close the Instructional Periods in Admin
* Disable Positions that are no longer options in the current year
* Disable Contract types that are no longer options in the current year