I. Session Descriptions

This section provides a detailed class description for each session

Session A - Introduction to Personnel

This session provides an introduction to the Human Resource System. Participants will be given an overview of the system, be introduced to the HRS Operations Manual, and be exposed to HRS functionalities. They will also receive hands-on guidance and experience in building a new employee including a review of the Employee Information Report (EIR) and Change Register. They will learn about job history and understand how what is entered on the assignment screens directly affects payroll and retirement processing.

The In-Person Session is a full-day beginner course and is recommended for employees who are new to using the system or who have minimal exposure because of limited job responsibilities.

The Virtual Session is a half-day beginner course with out the afternoon hands on portion.

Session B - Tables – District Maintained

This session benefits not only the person who is responsible for tables but also personnel and payroll staff working with HRS. The trainer will explain how the fields on each table interface with the system, making it easier to identify and correct problems. The tables that will be discussed are the Job Classification Table, the Work Location Table, the District Codes Table, both types of salary tables, the Stipend Table, and the Speed Key Table. Participants will learn how to search a table to easily locate an item on that table, how to build a speed key table, and how to use the table mass change feature to build new salary tables and stipend tables. There will be hands-on training in building and changing tables.

This half-day session is recommended for all staff with higher level HRS responsibility.

Session C - Work Calendars

Participants will learn the preparation needed to build work calendars, how to set up work calendar tables for certificated and classified assignments, and how to edit and delete existing work calendars. The In-Person session includes hands-on activities. The Virtual session includes a demonstration only.

This half-day session is recommended for all staff responsible for work calendar tables or whose responsibility in HRS is affected by work calendars.

Session D - Employee Data Base (EDB) Maintenance

This session explains how to effectively use the system when setting up or making changes to employee data. Participants will learn how to make future changes such as future hires, leaves, terminations, anniversary step increases, primary job, and labor distribution. They will also learn about options for setting up overtime, job history, archived records, and future-dated Employee Data Base (EDB) changes. This session will also introduce other optional personnel screens available for use.

This half-day session is recommended for staff who are responsible for inputting data for new employees or new assignments or making changes to existing assignments.

Session E - Time Reporting

Participants will learn how to better utilize regular payrolls in lieu of supplemental payrolls. There will be hands-on instruction in setting up batches and posting various transactions (dock time, late hires, terminations, lump sums, and mid-month). Participants will also be instructed on how and when to use the one-time pay screen vs. the time file, how to use the speed key account code on the “Z” time file, and how to override information on the time file without using the one-time pay screen. They will learn how earnings codes affect retirement and seniority, how payroll adjustments are made, and how to correct transactions before the payroll run. The In-Person sessions include hands-on training related to various payroll types. The Virtual sessions include demonstrations only.

This half-day session is recommended for staff responsible for payroll.

Session F - STRS Retirement Coding & Prior Period Adjustments

In this session, participants are provided with retirement information needed to correctly establish employees’ assignments on the Employee Data Base (EDB). This retirement review will include: STRS plans, status, special indicators, annualized retirement reporting rate (how it is calculated and what type of employees it applies to), bargaining unit, STRS Buybacks, and Job Classification Table. Participants will also receive instruction on AB 2700 changes and criteria, usage of new plans S6/S7, Earnings Codes DBS and DBL, and when and how to make requested corrections to prior-reported earnings using the RX and LX time reporting transactions. In addition, these topics will also be discussed: Adjustments due to AB 2700 implementation, when to use RXS and LXS earnings codes, impact to retirement earnings, and the role the work calendar plays when employees have not been correctly set up for retirement.

This half-day session is for staff who are responsible for payroll, inputting data for new employees or new assignments, or making retirement coding changes to existing assignments.

Session G - PERS Retirement Coding & Prior Period Adjustments

In this session, participants are provided with retirement information needed to correctly establish employees' assignments on the Employee Data Base (EDB). This retirement review will include: PERS plans, status, bargaining unit, PERS Buybacks, and the Job Classification Table. Participants will also receive instruction on when and how to make requested corrections to prior-reported earnings using the RX and LX time reporting transactions. In addition, these topics will also be discussed: Use of the RXS and LXS earnings codes, the impact to retirement earnings, and the role the work calendar plays when employees have not been correctly set up for retirement.

This half-day session is a must for staff who are responsible for payroll, inputting data for new employees or new assignments, or making retirement coding changes to existing assignments.

Session H - District Benefits & SFS Table Maintenance

Participants are provided information on the options for setting up benefits. The trainer(s) will explain how the Gross-To-Net Table and the Vendor Table relate to benefits and provide online instruction for building a benefit table. Instruction is provided on overriding benefits, timeframes for input, using the payroll and personnel effective dates, one-time deductions, tax-sheltered annuities (TSAs), EDB mass change capabilities, deduction registers, Report Access and Distribution System (RAD), Garnishments, and online Payroll History Screens 002, 004, and 005.

This half-day session is recommended for staff responsible for establishing benefit tables or inputting benefits on the Employee Data Base (EDB).

Session I - Payroll Processing

This session deals with payroll calculations and HRS internal processing (EDB, tables, and taxes). Participants will receive a CD with blank templates showing how to calculate certificated and classified dock pay, Ed Code Late Hire, Ed Code Termination, vacation pay-off lump sum, ESA gross, aggregate and non-aggregate tax calculations. It also includes the sequence of deductions, gross-to-net calculations, and how to check the processing online. Participants will review hard copy reports. The trainer will discuss salary computation differences between certificated and non-certificated employees and computation of income tax withholding. It will also include hands-on exercises for both Ed Code and income tax withholding. Other topics will be discussed as time allows.

This half-day session is recommended for staff responsible in the payroll area. It is recommended that staff also attend Session H – District Benefits & SFS Table Maintenance.

Session J - Position Control

Participants will be instructed in the use of position control and its relationship with Personnel, Payroll, and Budget (PC Budget) Modules. Training includes establishing positions, making changes to existing positions, and setting up Position Control benefit tables. Participants will learn the effect the Position Control Data Base (PCDB) has on other HRS modules. Online discrepancy messages and their resolution will be covered during the hands-on training in the In-Person sessions. The Virtual sessions include demonstrations only. A discussion of the various Position Control reports and their effective use is also included.

This half-day session is recommended for staff responsible for position control and/or personnel functions.

Session K - Cash Collections of Wage Overpayments

This class will benefit payroll and human resource personnel who are responsible for the accounting of employee returns of wage overpayments using the cash collection process. Attendees will be provided an explanation of the cash collection process and how to accurately calculate the overpayment amount to be recovered. In addition, required adjustments to employee and employer wages and taxes and accounting for mandatory and voluntary deductions and contributions will be explained. Examples from actual cash collections will be used to illustrate the discussion and method of accounting for an overpayment recovery.

This half-day session is recommended for staff with advanced payroll experience and responsible for cash collection activities and W2 reporting.

Session P - Introduction to Payroll

This session provides an introduction to payroll functionalities. Participants will be given an overview of regular and supplemental payroll schedules. They will receive online guidance in creating a batch, inputting time, and making payroll corrections. They will also learn about the Inquiry/Error Corrections transaction menu screen and the Payroll Online History transaction menu screen.

This half-day beginner course is recommended for employees who are new to using the system or who have minimal exposure because of limited job responsibilities.

Session T - Introduction to Payroll Tax Reconciliation

This session provides an introduction and overview of the basic concepts of payroll tax reconciliation. Participants will learn the reasons for reconciliation along with tips, tools, and best practices. Participants will become familiar with HRS screens and reports recommended for accurate payroll tax reconciliation. Participants will also be introduced to state and federal tax reporting and the impact of prior year adjustments.

This half-day session is recommended for school business staff who are new to payroll tax reconciliation.