

### QSSUG Finance/Personnel Committee Webinar

*Employee Maintenance January 29, 2020* 

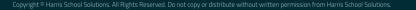
HARRIS School Solutions



### **QSS/OASIS** Employee Maintenance

# **Feature Discussion**







### **Feature Discussion**

- Ability to build and work with a list of employees
- Ability to save and recall employee lists
- Navigation tools for employee lists
- Multiple choices for searching and retrieving employees
- Flexible settings for an individual experience
  - Employee...
  - Auto-highlight required fields
- Local configuration options
  - Favorites
  - Hot Keys
  - QuikPeeks
  - Configure Search





## Feature Discussion (continued)

- Personnel dataforms
- Professional dataforms
- Position Control dataforms
- Payroll dataforms
- Navigation Tools
  - Default Home Field
  - Custom Home Field
  - Region Home Fields
  - QuikTab Fields



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### **QSS/OASIS** Employee Maintenance

# Main Form







## **Employee Maintenance – Main Form**

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### **QSS/OASIS** Employee Maintenance

# **Employee Search**







# Employee Search – Simple SSN, Ext Ref, Name or ID

🦫 Em	ploye	e Maintenance			39 - The Train USD	QSS/0ASIS	
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# Employee Search – Settings SSN, Ext Ref, Name or ID

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## **Employee Name Search – Help**

**Employee Search Help** 

Employee search tips

Print Close

The general format of a name search is :

LastName[, FirstName]

LastName (R):

You can search for employee last names by any of these methods:

SEARCH TYPE	EXPLANATION
Soundex	Type a last name, such as PETERSON. The search matches the name you typed, as well as other similar sounding names, such as PATTERSON, PETERS, PETERSEN, AND PETERKIN. For this and all other searches by name, the names are <u>not</u> case sensitive. In other words, all of the following are the same: PETERSON, Peterson, peterson, and pETERSON.
Exact Match	To search for an exact match to a last name, type the complete name, followed by a space and a slash (/). For example, type the following to match only the last name PETERSON: PETERSON / Be sure to type a space between the end of the name and the slash.
	You can combine an exact match and a soundex search, as in the following example:





### **Employee Search – Advanced**

🠓 Employee Adva	inced Search	
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### **Employee Search – Advanced (cont.)**

Employee Advanced Search		
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Start : _/_/ Start : _/_/	Start :         _/_/           Start :         _/_/	
End: _/_/ End: _/_/	End: _/_/ End: _/_/	
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End: _/_/ End: _/_/	End :/	
Birth Date	Longevity Base Date	
Start : _/_/ Start Month/Day :/	Start :/ Start Month/Day :/	
End :/ End Month/Day :/	End : End Month/Day :	
Anniversary Base Date		
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## **Employee Search – Advanced (cont.)**

Employee Advanced Search			_	
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EQ  Pay location :				
EQ  Pay code :				
EQ Control group :				
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EQ Pay schedule :				
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EQ 💌 🚰 DPO :				
Payroll Select	Tax Information Status Exemptions	Frend	ACA Class Selection	
Pay name :	Status         Exemptions           Federal :	Exempt	ACA Class	
Date paid for payroll select _/_/	State :	<b></b>		
Payroll Select constraints are not supported	County :	•	Class Assignment	
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### **Employee Search – Import**

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## **Employee Search – Configure Search**

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### **Employee Search – Configure Search (Cont.)**

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#### Available Additional Fields

🖌 🖌 Include 📑 Include All

	Description	Default Header	Custom Header	Action
•	Employee Rehire Date	Rehire Date	Rehire Date	Include
	Employee Anniversary Base Date	Ann Base Date	Ann Base Date	Include
	Employee Longevity Base Date	Long Base Date	Long Base Date	Include
	Employee Evaluation Due Date	Eval Due Date	Eval Due Date	Include
	Employee Original Hire Date	Orig Hire Date	Orig Hire Date	Include
	Employee Fingerprint Date	Fingerprint Date	Fingerprint Date	Include
	Employee Seniority Date	Seniority Date	Seniority Date	Include
	Employee Previous Sen Date	Prev Sen Date	Prev Sen Date	Include
	Employee Group Code	GC	GC	Include
	Employee Work E-Mail	Work E-mail	Work E-mail	Include
	Employee Ok to Rehire	OR	OR	Include
	Employee Ok to Pay	OP	OP	Include
	Employee Pay Location	PL	PL	Include
	Employee Pay Code	PC	PC	Include
	Employee Pay Schedule	W4/PS	W4/PS	Include
	Employee Stat. Ded Profile	W4/SDP	W4/SDP	Include
	Employee Control Group	CG	CG	Include
	Employee Deferred Pay Option	DPO	DPO	Include
	Employee Fed. Marital/Exemp.	Fed.M	Fed.M	Include
	Employee State Marital/Exemp.	Sta.M	Sta.M	Include
	Employee Retirement AC Code	Ret Code AC	Ret Code AC	Include
	Employee Retirement Codes	Ret Codes	Ret Codes	Include
	Employee ACA Current Class	ACA Current	ACA Current	Include
	Employee ACA Previous Class	ACA Previous	ACA Previous	Include
	Employee ACA Model Class	ACA Model	ACA Model	Include
	Employee Last Check Date	Last Check Date	Last Check Date	Include
	Employee Last Check Number	Last Check No	Last Check No	Include
	Employee Last Check Amount	Last Check Amt	Last Check Amt	Include

#### Selected Fields

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Description	Default Header	Custom Header	Display	Action
Gender	G	G	<b>V</b>	Default
Employee Birth Date	Birth Date	Birth Date	V	Exclude
Employee Type	Ту	Ту	<b>V</b>	Default
Employee Retirement System	RS	RS	<b>V</b>	Exclude
Employee Home Phone Number	Home Phone	Home Phone	<b>V</b>	Exclude
Site	Site	Site	<b>V</b>	Default
Bargaining Unit	BU	BU	<b>V</b>	Default
Employee Hire Date	Hire Date	Hire Date	V	Exclude
Report Code	RC	RC	<b>V</b>	Default
Leave Group	LG	LG	<b>V</b>	Default
Termination Date	Terminated	Terminated	<b>V</b>	Default
Work Phone	Work Phone	Work Phone	V	Default

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### **Employee Search – Add to grid**

Personnel Personnel Commons (CO) Client Defined (CL) Name Change History Employment Verification (VE) Benefits Management (BM) Applications (AP) Action Log History (AH) Search Action Log History (AH) Search Action Log History (CH) Personnel Portesional Professional Professional Position Control Search Panel Search Panel District: 39 Include Terminated Add to grid Search Panel Search Panel Benefits Management (BM) Applications (AP) Action Log History (CH) Search Action Log History View Audit Log Ourice Label Print Employee Data Import Bernergenzy/Medical Professional Position Control	Employee Maintenance	39 - The Train US	5D			QS	S/OAS	SIS			_ [
Personnel         Demographic (MA)         Termination (TE)         Employee ID Maintenance         Comments (CO)         Client Defined (CL)         Name Change History         Employment Verification (VE)         Leave Information (IV)         Benefits Management (BM)         Action Log (AL)         Action Log (AL)         Action Log History         View Audit Log         Quick Label Print         Employee Data Import         Brenergency/Medical         Professional         Prosition Control	ile Options Window Help Videos	Hot Keys									
Personnel         Demographic (MA)         Termination (TE)         Employee ID Maintenance         Comments (CO)         Client Defined (CL)         Name Change History         Employment Verification (VE)         Leave Information (IV)         Benefits Management (BM)         Action Log (AL)         Action Log (AL)         Action Log History         View Audit Log         Quick Label Print         Employee Data Import         Brenergency/Medical         Professional         Prosition Control	» 😤 🌄 🥟 📝 🕂 🕾 🕅	🥘 🖸 🏹 🕨 🔛									
<ul> <li>Demographic (MA)</li> <li>Termination (TE)</li> <li>Employee ID Maintenance</li> <li>Comments (CO)</li> <li>Client Defined (CL)</li> <li>Name Change History</li> <li>Employment Verification (VE)</li> <li>Leave Information (LV)</li> <li>Benefits Management (BM)</li> <li>Applications (AP)</li> <li>Action Log (AL)</li> <li>Action Log History (AH)</li> <li>Search Action Log History (AH)</li> <li>Se</li></ul>	arch complete. 1 record(s) found.										
	<ul> <li>Personnel</li> <li>Demographic (MA)</li> <li>Termination (TE)</li> <li>Employee ID Maintenance</li> <li>Comments (CO)</li> <li>Client Defined (CL)</li> <li>Name Change History</li> <li>Employment Verification (VE)</li> <li>Leave Information (LV)</li> <li>Benefits Management (BM)</li> <li>Applications (AP)</li> <li>Action Log (AL)</li> <li>Action Log History (AH)</li> <li>Search Action Log History</li> <li>View Audit Log</li> <li>Quick Label Print</li> <li>Employee Data Import</li> </ul>	By SSN By Ext Ref By Name I 001006 Ext Ref# : 001006 Search Results [Press Ctrl + Enter Name	SSN er to select the highli External Ref	: XXX-XX ghted emp 3 Ty	-1000 Noyee]	Selected	Emplo RUE RC	SEID: 7	t 7776665554	Work Phone	



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# **Employee Search – Grid Output**

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Search complete. 1 record(													
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COOPER, REA	LLIE	SNIKSTER	39	001003	M	FT	0002	04	02	AV		555-1212 x143	
PAIN, TRUE			39	001006	F	FT	0026	04	02	AV		(650)372-0200	
PERCOX, DEV	AYNE	DAPMAN	39	001004	М	FT	0002	02	02	AV			
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TESTER, IMA			39	001007	М	FT	0000	01	00	AV			
TROUBLE, RE	AL		39	001005	М	FT	0015	04	02			(650)372-0200 x608	

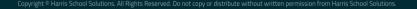




### **QSS/OASIS** Employee Maintenance

# File - Settings







### File – Settings ...

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	Name Change History     Employment Verification (VE)	Ex	Default Masterfile Sort	•		SEID: 5	5310563999		
	- Leave Information (LV)	Searcl	PYHDATE Range						
	Benefits Management (BM)		QuikPeek		RC	LG	Terminated	Work Phone	
	- Applications (AP)		Previously Viewed List		02	AV		555-1212 x143	
	Action Log (AL) Action Log History (AH)		Color Mode	•					
	- Search Action Log History		Auto-activate on Mouse hover		02	AV		(650)372-0200	_
	···· View Audit Log		Auto-highlight required fields		02	AV			
	Quick Label Print		Auto Action Log		02	AV		(650)372-0200 x608	
	Employee Data Import     Emergency/Medical		Put cursor in search panel when this screen is activated		00	AV			
	Professional		Show info icons when highlighting required fields on dataforms		02			(650)372-0200 x608	
	Position Control								
					V	- 2009	Dist: 20 Site: 1	55: W 2/22/2013 2:4	5-26 DM





### **Settings – Employee...**

✤ Employee Settings	×
Configure Maximum number of Open employees/applicants Choose the maximum number of employees/applicants that can be opened 5 ~	Choose Main Tree Colors Background Font Color Sample Root Sample Node
<ul> <li>Windows Colors</li> <li>Configure Employee/Applicant Color Identification</li> <li>Emp/App 1</li> <li>Emp/App 2</li> <li>Emp/App 3</li> <li>Emp/App 4</li> <li>Emp/App 5</li> <li>Font Color</li> <li>Font Color</li> <li>Font Color</li> <li>Font Color</li> </ul>	Bold Font     Font Size:      Standard     Medium     C Large      Choose Employee List Editor Tree Colors (Employee Mode Only)      Background     Font Color     Bold Font     Font Size:     Standard     Medium     C Large      Terminated Employee Blink Settings (Employee Mode Only)
Choose Employee/Applicant Grid Colors Row Color Font Color Sample Grid Row	Blink Termination Information     Preview :       Blink Frequency :     3
	Employee/Applicant Info Indentation Indentation : O Preview : Last, First 123-45-6789 123456 Term: 1/28/2020 (N/N)
	OK Cancel

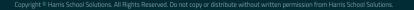




### **QSS/OASIS** Employee Maintenance

# QuikPeeks







### **Settings – QuikPeeks**

Options            Check All [Ctrl+K] ■ Uncheck All [Ctrl+N] ■ Invert          Available QuikPeeks            Employee Position Assignments         Employee Position Assignments         Employee Payroll Deductions         Employee Payroll Deductions         Employee Payroll Checks for Current Calendar Year         Employee Payroll Checks for Current Fiscal Year         Employee Payroll Checks for Date Range         Employee Payroll Checks for Date Range         Employee Client Defined Data         Employee Leave Balances         Employee Leave Group History         Employee Leave Group History Running Balance	Selection [Ctrl+1] + Transpose Selection Lists [Ctrl+T] Available DataForms Right-click context menu Demographic (MA) Termination (TE) Employee ID Maintenance Comments (CO) Client Defined (CL) Name Change History Employment Verification (VE) Leave Information (LV) Benefits Management (BM) Applications (AP) Action Log (AL) Action Log History (AH) Search Action Log History View Audit Log Quick Label Print Employee Data Import Employee Data Import Emergency (ME*) Immunizations (ME*)	
	Handicaps (ME*) Credentials (SK*) CA-CTC Credentials (CR) CA-CTC Credentials View Service Yrs/Units (SK*) Degrees (SK*)	-





### **Settings – QuikPeeks**

Qptions                 Check All [Ctrl+K] ■ Uncheck All [Ctrl+N] ■ Invert Selection           Available DataForms                 Fight-click context menu             Demographic (MA)             Termination (TE)             Employee ID Maintenance             Comments (CO)             Client Defined (CL)             Name Change History             Employment Verification (VE)             Leave Information (LV)             Benefits Management (BM)             Applications (AP)             Action Log (AL)             Action Log History             View Audit Log             Quick Label Print             Employee Data Import	on [Ctrl+1] *I* Transpose Selection Lists [Ctrl+T] Available QuikPeeks Employee Comments by Comment Type Employee Position Assignments Employee Position Assignments w/Pay Info Employee Prime Position Assignment Employee Payroll Deductions Employee Payline Information Employee Payline Information Employee Payroll Checks for Current Calendar Year Employee Payroll Checks for Current Fiscal Year Employee Payroll Last Check Information Employee Payroll Checks for Date Range Employee W4 Data Employee Client Defined Data Employee Demographic Information Employee Leave Balances
Emergency (ME*) Immunizations (ME*) Medical (ME*) Handicaps (ME*) Credentials (SK*) CA-CTC Credentials (CR) CA-CTC Credentials View Service Yrs/Units (SK*) Degrees (SK*) Skills (SK*) Inservice (SK*) Educational Units (EU) Evaluations (EV*)	<ul> <li>Employee Absences for Current Fiscal Year</li> <li>Employee Leave Group History</li> <li>Employee Leave Group History Running Balance</li> </ul>





### **Employee Maintenance – QuikPeeks**

😓 Demogra	ohic 39 - The Train USD Q55/0ASIS	
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### **QSS/OASIS** Employee Maintenance

# **Highlight Required Fields**







### **Settings – Auto-highlight required fields**

	nployee Maintenance			39 - The Train USD	(	)55/0A9	15			_ 🗆
e			7_							
		Ctrl+F12	K							
L	View recently added employees [Empty]		E							
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	···· Quick Label Print			Auto Action Log		02	AV		(650)372-0200 x608	
	Employee Data Import			Put cursor in search panel when this screen is activated		00	AV			
_	⊡ Emergency/Medical Professional			Show info icons when highlighting required fields on dataforms		02			(650)372-0200 x608	
Ξ.	Professional		-		_					
Ξ.	Payroll									
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### **Employee Maint. MA – w/required fields**

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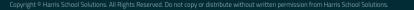




### **QSS/OASIS** Employee Maintenance

# Favorites / Hot Keys







### **Options – Enable Favorites**

Employee Maintenance 39 - The Train USD Q55/0ASIS															
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			Search by ID	Ctrl+Alt+I	ch Panel										
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			Change SSN	F10	rch Results [Press Ctrl + Ente	er to select the hi	ghligh	ted emp	oloyee]						
		+	Add New Employee	F9	Name	External Ref	G	Ту	Site	BU	RC	LG	Terminated	Work Phone	
	-	84	Add Substitute Employee	Ctrl+F9	COOPER, REALLIE (SNIKSTER)	001003	м	FT	0002	04	02	AV		555-1212 x143	
			Grid Output	Shift+F11	PAIN, TRUE	001006	F	FT	0026	04	02	AV		(650)372-0200	
		3	Print Screen	F11	PERCOX, DEWAYNE (DAPMAN)	001004	м	FT	0002	02	02	AV			
		14	First Employee	Shift+F5	PERSON-SMITH, DARRYL	001002	М	FT	0001	04	02	AV		(650)372-0200 x608	
			Previous Employee	F5	TESTER, IMA	001007	М	FT	0000	01	00	AV			
		Þ	Next Employee	F6	TROUBLE, REAL	001005	М	FT	0015	04	02			(650)372-0200 x608	
		ы	Last Employee	Shift+F6											
l t	··		View Auto-load Settings	Ctrl+M	-										
Ē		~	Enable Favorites		1										
			Edit Employee Lists	Ctrl+L											
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### **Adding forms to Favorites**

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File Options Window Help Videos Hot	t Keys									
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···· View Audit Log	PERSON-SMITH, DARRYL	001002 M	FT	0001	04	02	AV		(650)372-0200 x608	_
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### **Employee Maintenance – Favorites**

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··· Applications (AP)	PERSON-SMITH, DARRYL	001002	М	FT	0001	04	02	AV		(650)372-0200 x608	
Action Log (AL)	TESTER, IMA	001007	М	FT	0000	01	00	AV			
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Professional     Position Control											
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### **Employee Maintenance – Show Hot Keys**

🐓 Employee Maintenance	SD			QS	S/OAS	SIS				
<u>F</u> ile <u>O</u> ptions <u>W</u> indow <u>H</u> elp Videos	Hot Keys									
	Demographic (MA)         Ctrl+Shift           Assignments/ENH (EA)         Ctrl+Shift           Pay Lines (PR)         Ctrl+Shift           Deductions (PD)         Ctrl+Shift	+Ε +Ρ								.::
Demographic (MA)     Assignments/ENH (EA)     Pay Lines (PR)     Deductions (PD)     Personnel	By SSN By Ext Ref By Name	By ID Dist	District : 39  Include Terminated Add to grid Selected Employee/List PAIN, TRUE							
Demographic (MA)	Ext Ref# : 001006	SSN	: xxx-xx	-1000			SEID: 7	7776665554		
Termination (TE)     Employee ID Maintenance	Search Results [Press Ctrl + Ent	er to select the highlig	phted emp	oloyee]						
- Comments (CO)	Name	External G Ref	Ту	Site	BU	RC	LG	Terminated	Work Phone	
···· Client Defined (CL) ···· Name Change History	COOPER, REALLIE (SNIKSTER)	001003 M	FT	0002	04	02	AV		555-1212x143	
Employment Verification (VE)	PAIN, TRUE	001006 F	FT	0026	04	02	AV		(650)372-0200	
Leave Information (LV)     Benefits Management (BM)	PERCOX, DEWAYNE (DAPMAN)	001004 M	FT	0002	02	02	AV			
Applications (AP)	PERSON-SMITH, DARRYL	001002 M	FT	0001	04	02	AV		(650)372-0200 x608	
Action Log (AL)	TESTER, IMA	001007 M	FT	0000	01	00	AV			
Action Log History (AH)	TROUBLE, REAL	001005 M	FT	0015	04	02			(650)372-0200 x608	
<ul> <li>Search Action Log History</li> <li>View Audit Log</li> <li>Quick Label Print</li> <li>Employee Data Import</li> <li>Emergency/Medical</li> <li>Professional</li> <li>Position Control</li> <li>Payroll</li> </ul>									G5: W 2/22/2013 4:0	





# **Employee Lists**







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	" <b>a</b>	Search by Name 0	Ctrl+Alt+N											.::
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	84	Add Substitute Employee	Ctrl+F9	COOPER, REALLIE	Ref		-					Tommatod		_
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	3	Print Screen	F11	PERCOX, DEWAYNE (DAPMAN)	001004	М	FT	0002	02	02	AV			
		First Employee	Shift+F5	PERSON-SMITH, DARRYL	001002	М	FT	0001	04	02	AV		(650)372-0200 x608	
		Previous Employee	F5	TESTER, IMA	001007	М	FT	0000	01	00	AV			
		Next Employee	F6	TROUBLE, REAL	001005	М	FT	0015	04	02			(650)372-0200 x608	
		Last Employee	Shift+F6											
		View Auto-load Settings	Ctrl+M											
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	S	kills (SK*)		_										
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## Edit Employee Lists (cont.)

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	39	PERCOX, DEWAYNE (DAPMAN)	001004	м	FT	0002	02	02	AV		
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## **Employee History Lists**

Employee Maintenance	D	Q55/0ASIS								
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Handicaps (ME*)	Name 🛆	External Ref	G Ty	Site	BU	RC	LG	Terminated	Work Phone	
Professional     Position Control	COOPER, REALLIE	001003 M	I FT	0002	04	02	AV		555-1212 x143	
	(SNIKSTER)	001006 F		0026	04	02	AV		(650)372-0200	_
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··· Direct Deposit	(DAPMAN)	001004 M	1 FT	0002	02	02	AV			
··· Deductions (PD)	PERSON-SMITH, DARRYL	001002 M	1 FT	0001	04	02	AV		(650)372-0200 x608	
···· Pay Lines (PR)	TESTER, IMA	001007 M	1 FT	0000	01	00	AV			
Payroll Events (PE)	TROUBLE, REAL	001005 M	1 FT	0015	04	02			(650)372-0200 x608	
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- Tax Modeling										
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## **Payroll History**

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06/07	7/2006		A	00000000	06/07/2006	00	00	06	01	2.00	0.00	0.00	
06/05	5/2006		А	0000005	06/05/2006	00	00	06	01	30.00	0.00	0.00	
06/04	4/2006		A	00000004	06/04/2006	00	00	06	01	2.00	0.00	0.00	
06/03	3/2006		A	0000003	06/03/2006	00	00	06	01	0.00	0.00	0.00	
06/02	2/2006		A	0000002	06/02/2006	00	00	06	01	0.00	0.00	0.00	
06/02	2/2006		A	11111112	06/02/2006	00	00	06	01	2.00	0.00	0.00	
06/01	1/2006		A	00001111	06/01/2006	00	00	06	01	2.00	0.00	0.00	
05/31	1/2006		м	72132582	05/31/2006	02	02	06	02	5,482.00	700.00	5,323.54	
04/28	8/2006		м	72131190	04/30/2006	02	02	06	02	5,482.00	700.00	5,323.54	
04/10	0/2006		HC	09899587	03/31/2006	02	02	06	02	1,686.72	0.00	1,686.72	
03/31	1/2006	Yes	м	72129045	03/31/2006	02	02	06	01	5,271.00	700.00	5,112.54	
02/28	8/2006		м	72127031	02/28/2006	02	02	06	01	5,271.00	700.00	5,112.54	
01/31	1/2006	Yes	MC	72124832	01/31/2006	02	02	06	01	5,271.00	700.00	5,112.54	
01/31	1/2006		A	72124832	01/31/2006	00	00	06	00	-72.96	0.00	0.00	
01/06	6/2006		А	00000000	06/06/2006	00	00	06	01	2.00	0.00	0.00	
01/01	1/2001		A	11122222	02/02/2002	00	00	1	01	0.00	10.00	0.00	
01/01	1/2000		А	00000111	01/01/2001	00	00	1	01	10.00	6.00	0.00	
01/01	1/1900		А	01111121	01/01/1900	00	00	00	00	0.00	0.00	0.00	
01/01	1/1900		А	01111122	01/01/1900	00	00	00	02	0.00	0.00	0.00	
01/01	1/1900		А	11111123	01/01/1900	00	00	00	00	0.00	0.00	0.00	
•													· Č
											Record Co	ount:	71





## **Basic Features**







Employee Maintenance 39 - The Tran USD Q55/0/								55/0A9	515			_ 🗆 🗵
File Options Window Help+Video	Hot Keys											
To 😤 🏪 🧼 📝 🕂 🕾 🛙 🗉	m 🧐 🔽											
												.::
Action Log History (AH)	•	ch Panel										
··· Search Action Log History		1 1		Dietri	ct : 39	-	_	المرجاب والم	e Termir	nated 🔽 Add t	a anta	
··· View Audit Log	В	By SSN By Ext Ref By Name	By ID	Distri	u. <u>1</u> 35	_					to gria	
Quick Label Print			·				Selected		·	t —		
Employee Data Import							COOPER	R, REAL	LIE.		💽 🤣 🔜 📃	
<ul> <li>Emergency/Medical</li> <li>Emergency (ME*)</li> </ul>		Ext Ref# : 001003								210502000		
··· Immunizations (ME*)		EXT Nel# . 001005		SSN:2	<u> </u>	-5555			SEID: 5	310563999		
Medical (ME*)	Sear	rch Results [Press Ctrl + Ente	er to select the h	nighligh	ted emp	oloyee]						
Handicaps (ME*)		Name 🛆	External	G	Ту	Site	BU	RC	LG	Terminated	Work Phone	
Professional		COOPER, REALLIE	Ref		-							_
Position Control		(SNIKSTER)	001003	М	FT	0002	04	02	AV		555-1212 x143	
⊡ • Payroll		PAIN, TRUE	001006	F	FT	0026	04	02	AV		(650)372-0200	
···· W4/Control Data (W4) ···· Direct Deposit		PERCOX, DEWAYNE (DAPMAN)	001004	м	FT	0002	02	02	AV			
- Deductions (PD)		PERSON-SMITH, DARRYL	001002	м	FT	0001	04	02	AV		(650)372-0200 x608	
Pay Lines (PR)		TESTER, IMA	001007	M	FT	0000	01	00	AV		(000)072 0200 x000	
Payroll Events (PE)		TROUBLE, REAL	001005	M	FT	0015	04	02			(650)372-0200 x608	
···· Time Card Entry (TC)		11100022,11212									(000)072 0200 x000	
··· Deferred Pay												
Deduction Accumulators												
Substitute Batch Entry												
- Child Support Information Tax Modeling												
···· Payroll Data Import												
□- History / Inspect												
- Payroll History												
- Search Pay History												
Inspect Labor/Benefits												
···· View Retirement History												
····· View W2 Data												
	-											
								Vr	2008	Dist: 30 Site: 1 C	S: W 2/24/2013 12:5	3-43 DM





## **Employee Demographic (MA)**

🦆 Demographic	39 - The Train USD	QSS/OASIS	
File Options Navigation Window			
	🛐 🤝 漠 🤱 Switch to: 🗸 🛛 All F	Posns 🔻	
PAIN, TRUE 1006 XXX-XX-1000 ID: 7776	665554 MA AB		ChangeMode ,;;
		<u>Sh</u>	IN SSN DA08-09/14/2012-13:01:53
	First Name I. Preferred	Name History	
Mailing Address : 867 American Stre City : San Carlos Hm : (650) 777-7777 T	State : CA 💌 Z	Restrict      P: 94070      372-0200 Ex: T: V	: (000) – T: 🔽
Work email : Home email :			
Resident Address : City :	State : ZIP :		
Hire : 01/24/2000	Rehire :	Original Hire : 01/24/2000	Date of Birth : 11/21/1956
Long base :	Ann base : 04/24/2000	TB Ex : 10/01/2010	Evaluation due :
Fingerprint : 01/24/2000	Seniority : 04/24/2000	Prev Seniority :	Misc :
Type: FT - FULLTIME	Group : Gender : F	19:	Bargaining unit : 04 - MGMNT
Ethnicity : KL - KL	Rep code : 02 - CLASS	Citizen : US - USA 💌	
Hispanic/Latino : 🗖 Race :	•	•	•
Ethnic/Race :	Disabled :	Veteran : 🗖 # Dependents	: 0 Fringe : 🗖 Loyalty : 🔽
	Lang 1 :	Lang 2 :	▼ Lang 3: ▼
		Yr: 2008 Dist: 39	Site: 1 GS: W 2/24/2013 12:57:57 PM;





## **Name Change History**

Demographic	39 - The Train US	D	QSS/OASIS		_ 🗆 🗙
File Options Navigation Window					
	🔽 🦘 🜏 器 Swit	ch to: - All Posns			
PERCOX, DEWAYNE 1004 XXX-XX-2221	ID: 000000929			Chan	geMode 🤢
			2	5how SSN 📝 DAPX-10/23/2012-	14:51:52 .::
Title Last Name	First Name I.	Preferred			
PERCOX	DEWAYNE	DAPMAN Name	History *		
			/		
🐓 Name History	39 - The Train US	D	QSS/OASIS		
File Options Window					
Close 🛛 📰 🛛 🍔 🎖 Switch to:	•				
PERCOX, DEWAYNE 1004 XXX-XX-22	221 ID: 000000929			InspectMod	e:
					.::
1 item(s) found				< Page 1 of 1 >	
LastName	First Name I.	Type LastUsed	Source ID D	)ate Time	
1. PERCOX	DUANE	C - 04/07/2008	MA DAPD 0	4/07/2008 11:50:17 AM	
GOT THE FIRST NAME INCOF					
BUT THE TIKET WATE THEOR	(RECI				
					μ
L					
			Yr: 2008 Dist: 39 Site:	1 GS: W 2/24/2013 1:01:51 P	M
			Yr: 2008 Dist: 3	39 Site: 1 GS: W 2/24/2013 1:	01:51 PM .::





## **Employee Maintenance - W4**

₽ W4/Co	ontrol				98 - Tra	ilswa	y Community S	chools				QSS/OASIS			- 0	×
<u>F</u> ile <u>O</u> p	otions	<u>N</u> avigation	Window													
	۳.	1 📑 🗖		🧇 🌅	<b>Switch t</b>	o: <del>•</del>										
			945-19-2041												Changel	Mode
													<u>Sh</u>	ow SSN 📝 PYSB-06	18/2018-16:	03:08
W-4 Infor	mation —	2020 W	4 (Currently N I	n record) Unche	ack this if you :		nly changing con	trol informa	tion	Checkbox	20					
		1. 2020 11	+ (currently iv)	in recordy offerine	EXEMP		my changing con		1001	) Checkbox	20					
		Status	Exemptions	a Tax-CC	Y A		Special T	ax Rules	Box 3	Box 4a	Box 4b	Box 4c	Hold/Ignore	Deduction	Schedule	
	Federal		01 00	00 ~	0.0			0.00	0.00	0.00	0.00	0.00	V	Doubouch	Conodato	_
Lock	State :	s ~	00 00	05 ~	00			0.00	0.00	0.00	0.00	0.00	~			
	County	: ~		$\sim$	0.0	0							$\sim$			
	City	: ~		$\sim$	0.0	0							$\sim$			
	Local :	. ~		$\sim$	0.0	0							$\sim$			
Control In	formation															
Check s	sort: 21	06 - Westp	ort Junior	High		$\sim$	Alt check sort :	2106 - 1	Westport Jun	ior High	~					
Pay co	ode: 03	- CLASSIE	TED HOURLY	MONTHLY		$\sim$	Primary RS :	02 - PEI	RS RETIREMEN	T	~	Unit : 000				
Ret co	ode: 08	60004					Secondary RS :	00 - NO	CODE			Unit : 000				
Pay sched	lule M-	11 - 11	MONTHS			$\sim$	Statutory ded :	CL-FP ·	- CLASS FICA	PERS	~					
	PO: N			eqular fund	ling	$\sim$	EIC :		Sub: 0 - Not		~					
			SIFIED ALPHA	-		~										
		0.000000							Current							
Retr			Member II			-	(F)		Previous							
User def	r(1): [11	0599 (2)		(3)	(4)		(5)		Model :	0000						
Pending	ret:					$\sim$	SMF status/dat	e:								
													V	iter 00 CCr W 1 (20)	0.21-5	4 4 14
l .													11. 2020 DISC 98 5	ite: 00 G5: W 1/28	2020   9:21:5	APT



48



## Add New Employee







## **Add New Employee**

😓 Employee Maintenance		39 - The Train USD	QSS/OASIS			IX
File Options Window Help+Video	Hot Key	ys				
🌝 🥸 🧶 🥜 📝 🕂 🕅	m 🗐					
						:
- Favorites		Search Banel				
Demographic (MA)			District : 39 💌 🗖 Include Termin	nated 🔽 Add to	o arid	
- Assignments/ENH (EA) - Pay Lines (PR)		Verify New Employee				
Deductions (PD)					💌 🧈 🔜	
Demographic (MA)				0563999		
Termination (TE)		Last Name First Name	l			
- Employee ID Maintenance		NEWGAL SHESA	R Upshift Name			
Comments (CO)		SSN DOB		Terminated	Work Phone	
- Client Defined (CL)					555-1212 x143	
Wame Change History     Employment Verification (VE)		246813579 01/18/1989				
- Leave Information (LV)					(650)372-0200	
Benefits Management (BM)						
- Applications (AP)					(650)372-0200 x608	
Action Log (AL)						
- Action Log History (AH)					(650)372-0200 x608	
Search Action Log History						
···· View Audit Log						
- Quick Label Print Employee Data Import						
Employee Data Import						
Emergency (ME*)		V	/erify Reset Cancel			
Immunizations (ME*)						
···· Medical (ME*)						
Handicaps (ME*)						
⊡ · Payroll W4/Control Data (W4)						
Direct Deposit	<b>_</b>					
,						
			Yr: 2008	Dist: 39 Site: 1 (	55: W 2/24/2013 1:14:46 P	M





🔜 Add New Employee	
Eile Navigation	
📑 Close 🛛 🖬 💽 💽 😓 😓 Switch to: 👻	
😓 Demographic 39 - The Tra	sin USD QSS/OASIS X
File Options Navigation Window	
	Switch to: -
NEWGUY, HESAH R NoExtRef XXX-XX-1111 ID: n/a	AddMode ,;;
	Show SSN;
	I.         Preferred           R         Name History
Mailing Address :	E Restrict
City : S	State : CA 🔽 ZIP :
Hm : ( ) - T : 🔽 Restric	t Wrk: ( ) - Ex: T: 💌 Oth: ( ) - T: 💌
Work email :	
Home email :	
Resident Address :	
City : State :	
Hire : Rehire :	Original Hire : Date of Birth : 06/08/1974
Long base : Ann base :	TB Ex : Evaluation due :
Fingerprint : Seniority :	Prev Seniority : Misc :
Type: Group:	
	Citizen :
Hispanic/Latino : Race :	
Ethnic/Race : Disa	bled : Veteran : # Dependents : Fringe : Loyalty :
	Lang 1:  Lang 2:  Lang 3:
	Yr: 2008 Dist: 39 Site: 1 GS: W 8/9/2012 10:32:27 AM





## Add New Employee (cont.)

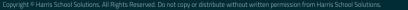
ast Name PAIN	First Name I. TRUE Upshift Name
SSN 100000000	DOB 11/21/1956
This employee is	alwaadw on file with a different SSN
This employee is a	already on file with a different SSN.
	already on file with a different SSN.





# Change SSN







## **Change Employee SSN**

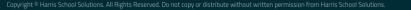
Employee Maintenance	39 - The Train	ı USD	QSS/0ASIS		
File Options Window Help+Video	Hot Keys				
🗇 🥸 🛃 🥜 📝 🕂 음리 [	III 🤍 🔽 🔽 🔛 🛛				
- Favorites	Search Panel				
··· Demographic (MA)				- (- (	1
Assignmenta/ENT (EA)	Change SSN			<u>- 0 ×</u>	
Pay Lines (PR)				.::	
Deductions (PD)					
⊡ Personnel	Old SSN New	v SSN			
Demographic (MA)	999887777 99	9887778			
Termination (TE)     Employee ID Maintenance					
- Comments (CO)	Remove data belonging to old SSN				
Client Defined (CL)					Phone
Name Change History			Gridout	ut	143
- Employment Verification (VE					200
- Leave Information (LV)	Dataset / (No. of recs to be copied)	Dataset / (No. of recs to be copied)	Dataset / (No. of recs to be copied)	<b></b>	
- Benefits Management (BM)	DI/SSN master (1)	SSN master (0)	Demographic data (1)		
Applications (AP)	Leave balances (1)	Client defined (1)	Additional demog. (1)		200 x608
Action Log (AL)	Emergency data (1)	Comments (0)	Credentials (1)		
Action Log History (AH)	Degrees (0)	Job hist: obsolete (0)	Subjects (0)		200 x608
Search Action Log History     View Audit Log	Inservice (0)	Experience (0)	Skills (0)	-	
Quick Label Print				-	
Employee Data Import	Applications (0)	Test results (0)	Evaluation results (0)		
Emergency/Medical	Position assign. (0)	Site preferences (0)	Teaching history (0)		
Emergency (ME*)	Subject preference (0)	Payroll master (1)	Payroll payments (11)		
··· Immunizations (ME*)	Payroll positions (1)	Payroll accounts (11)	Payroll adjustment (0)		
Medical (ME*)	Payroll labor hist (0)	Pay deductions (0)	Payroll history (0)		
Handicaps (ME*)	Row/Dod biston( (0)	Raw Doduction Hist (0)	Deferred Ray lefe (0)		
Professional					
⊡ · Payroll W4/Control Data (W4)		Cont	tinue Change Reset	Cancel	
- Direct Deposit					
					1
			Yr: 2008 Dist: 39 Site: 1	GS-W 2/2	4/2013 1.19-28 PM





## **Other Features**







## **Employee Maintenance – By ID**

Search Panel By SSN By Ext Ref By Name	By ID District : 39	Incluce     Selected Empl	de Terminated 🗖 Add to grid loyee/List
SSN :	Ext Ref # :		
🐓 Employee ID Maintenance	39 - The Train USD	Q55/0A	SIS
<u>File Options</u> Window			
Close 🛛 💽 🔽 🧇	📰 🥘 🥵 Switch to: 🗸		
PAIN, TRUE 1006 XXX-XX-1000 ID:	7776665554 MA AB		ChangeMode
			DEA1-08/21/2012-10:09:52 ,;;
Ex	SSN: ***-**-1000 Show SSM tRef: 001006 Additional Employee ID Val		
Description	Value	Action	Audit Info
SEID CALPERS-ID	7776665554 N/A	Change Assign	DEA1-08/21/2012-10:09:52 N/A
	[	Yr: 2008 Dist: 39 5	ite: 1 GS: W 2/24/2013 1:22:05 PM .;;





## **Termination (TE)**

🐓 Termination	39 - The Train USD	Q5!	5/0ASIS	
<u>File Options</u> Window				
8677	+ 🖹 🔽 🚺 🔽 🔇	🌮 🗒 🚷 Switch to: 👻	All Posns 👻	
PERSON, REAL 1000 XXX	-XX-5555 ID: 7676767699 MA	AB TE		ChangeMode;
			Show SSN DAPX-03	<b>/23/2013-13:45:43</b> • .::
Termination reason:				
Termination date:	/	These field selections onl terminated using this scre employees, these fields v	en. For previously termin	
OK to rehire?		Use termination date to end	d open assignments in fy 08	
OK to pay?		Direct Deposit: Re	tain existing statu	3
Date	Comments			
► 10/18/2010	The comment is an area where can ty word wrap for you.	vpe and it will		
		Yr: 2008 Di	st: 39 Site: 1 GS: W 2/1	8/2014 11:15:48 AM





🐓 Quick Label Print	39 - The Train USD	QSS/OASIS	
<u>F</u> ile <u>O</u> ptions			
😂 Print Labels 🍓 Print Sample 🎍 Print Sam	ple Without Borders 友 Preview 🛞	Preview Off 📑 Close 👩 🛛 🤯 🖉 Microso	ft Sans Serif, 8.25 📑 🚍 💂
Print to Preview done			InspectMode:
Label Style: Employee Name and Addre Avery Label Number: Avery 5160 (3 x 10) • Labels per Employee: 1 Total Employees: Copies: 1 Total Labels: Start at Label: 1 • Sample Label Employee W. Name 2020 Fineview Blvd. Future City, CA 98765-2020	ss Labels Choose Employee(s) 5 Selected Employee 5 Listed Employees		
		Yr: 2008 Dist: 39 Site:	1 GS: W 8/21/2012 8:13:30 AM





## Navigation Tools (MA)

🔛 Demographic	39 - The Train USD	QSS/OASIS	
	avigation Window Default Home Field: Emp Title Ctrl+Alt+H Custom Home Field: <unassigned> Ctrl+Alt+C</unassigned>	o: • Prime Posn •	
PERSNIKITY, RE	Region Home Fields	Emp Title Ctrl+0	ChangeMode 💥
	QuikTab Fields	Address, Mailing Ctrl+1	L-08/18/2011-11:27:16 .::
Title Last N	lame First Name I.	Address, Residence Ctrl+2	
MR PERS	SNIKITY REALLIE	Date, Hire Ctrl+3 Show SSN	
		Hispanic/Latino Ctrl+4	
Mailing Address :	1234 S. MAIN STREET	Restrict	
City :	SAN MATEO State : CA	A ZIP: 12345	
Hm :	(650) 555-1212 T: M 🔽 🗖 Restrict Wrk:	(650) 372-0200 Ex: 608 T: B ▼ Oth: ( )	- T: 💌
Work email :	jeffv@qss.com		
Home email :			
Resident Address : City :		:	
Hire :	07/01/1998 Rehire :	Original Hire : 07/01/1997 Date of Birth :	07/31/1956
Long base :	Ann base : 04/24/5011	TB Ex : 08/15/2014 Evaluation due :	
Fingerprint :	04/12/2000 Z Seniority : 04/24/5011	Prev Seniority : Misc :	07/01/2007
Type :	FT - FULLTIME Group : Gender : M	I 9 : Bargaining unit :	04 - MGMNT 💌
Ethnicity :	PI - PACISLND  Rep code : 02 - CLASS	Citizen : US - USA      Lang 1 :	<b>•</b>
Hispanic/Latino :	Disabled : 🗖 Veteran :	T # Dependents : 0 Lang 2 :	<b>_</b>
Ethnic/Race :	FI - FILIPINO - Fringe : Loyalty :	I▼ Lang 3 :	•
Race :	100 - AMERICAN V 201 - CHINESE V 30	1 - HAWAIIAN 206 - LAOTIAN 🔽 600 - BLACK/AN	•
		Yr: 2008 Dist: 39 Site: 1 GS: W 8	8/22/2011 2:30:18 PM





🔡 Demographic	39 - The Train USD	QSS/0ASIS	
File Options Na	avigation Window		
		o: • Prime Posn •	
PERSNIKITY, RE	Custom Home Field: <unassigned> Ctrl+Alt+C</unassigned>		ChangeMode
	Region Home Fields		EA1-08/18/2011-11:27:16
Title Last N	QuikTab Fields	Emp Title Ctrl+Alt+0	
	SNIKITY REALLIE	Emp Last name Ctrl+Alt+1	
PERC	JAIRTI KEALLIE		
		Emp Middle initial Ctrl+Alt+3	
Mailing Address :	: 1234 S. MAIN STREET	Emp Preferred name Ctrl+Alt+4	
City :	SAN MATEO State : CA	ZIP: 12345	
Hm :	(650) 555-1212 T: M 🔽 🗖 Restrict Wrk:	(650) 372-0200 Ex: 608 T: B ▼ Oth: (	) – T: 🔽
Work email :	jeffv@qss.com		
Home email :			
Resident Address : City :			
Hire :	07/01/1998 Rehire :	Original Hire : 07/01/1997 Date of Birl	th: 07/31/1956
Long base :	Ann base : 04/24/5011	TB Ex : 08/15/2014 Evaluation du	le:
Fingerprint :	04/12/2000 Z Seniority : 04/24/5011	Prev Seniority : Mis	sc: 07/01/2007
Type :	FT - FULLTIME Group: Gender: M	I 9 : Bargaining ur	nit: 04 - MGMNT 💌
Ethnicity :	PI - PACISLND  Rep code: 02 - CLASS	▼ Citizen : US - USA ▼ Lang	1:
Hispanic/Latino :	Disabled : Disabled :	T # Dependents : 0 Lang	2:
Ethnic/Race :	FI - FILIPINC - Fringe : Loyalty :	☑ Lang	3:
Race :	100 - AMERICAN 201 - CHINESE 30	1 - HAWAIIAN 🔽 206 - LAOTIAN 💌 600 - BLACK	/AI
		Yr: 2008 Dist: 39 Site: 1 GS: W	8/22/2011 2:31:50 PM ,;;





묥 Demographic	39 - The Train USD	Q55/0A5I5	
File Options Na	avigation Window		
Settings	Configure Field Navigation Ctrl+N vitch to: -	Prime Posn 👻	
Close F12	1003 XXX-XX-1111 ID: 5310563451		ChangeMode
		DEA1	-08/18/2011-11:27:16 ;;;
Title Last N	Name First Name I. Preferr	ed	
	SNIKITY REALLIE SNIK		
,,	, , , ,		
Maillian Addama			
	: 1234 S. MAIN STREET		
-	SAN MATEO State : CA 💌	ZIP: 12345	
Hm :	(650) 555-1212 T: M 🔽 🗖 Restrict Wrk: (650)	0) 372-0200 Ex: 608 T: B ▼ Oth: ( )	- T: 🔽
Work email :	jeffv@qss.com		
Home email :			
Resident Address :	:		
City :	State : MT V ZIP :		
Hire :	07/01/1998 Rehire :	Original Hire : 07/01/1997 Date of Birth :	07/31/1956
Long base :	Ann base : 04/24/5011	TB Ex : 08/15/2014 Evaluation due :	
Fingerprint :	04/12/2000 Z Seniority: 04/24/5011	Prev Seniority : Misc :	07/01/2007
Type :	FT - FULLTIME Group : Gender : M	I 9 : Bargaining unit :	04 - MGMNT
Ethnicity :	PI - PACISLND  Rep code: 02 - CLASS	Citizen : US - USA Lang 1 :	•
Hispanic/Latino :	Disabled : 🗖 Veteran : 🗖 #	# Dependents : 0 Lang 2 :	-
Ethnic/Race :	FI - FILIPINC - Fringe : Loyalty : 🔽	Lang 3 :	-
Race :	100 - AMERICAN 💌 201 - CHINESE 💌 301 -	HAWAIIAN 💌 206 - LAOTIAN 💌 600 - BLACK/AH	
		Yr: 2008 Dist: 39 Site: 1 GS: W 8	/22/2011 2:33:09 PM



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File		
Default Home Field The field on which the cursor is placed by default when this dataform is activated.	Custom Home Field If 'Use Custom Home Field' is checked, the cursor is directed to the selected field when this dataform is activated.	Predefined Region Home Fields The following represent home fields for pre- defined regions on this dataform. The cursor can be directed to these fields by pressing [Ctrl+ <idx>] where idx is the number of the defined region.</idx>
Default Home field : Emp Title	Custom Home field : <unassigned></unassigned>	0. Emp Title
		1. Address, Mailing
QuikTab Fields	2. Address, Residence	
Up to 10 fields on the screen can be defined fields by pressing [Ctrl+Alt+ <idx>], where idx</idx>		3. Date, Hire
	<u>Configure</u>	4. Hispanic/Latino
0. Emp Title	5. <unassigned></unassigned>	
0. Emp Title 1. Emp Last name	5. <unassigned> 6. <unassigned></unassigned></unassigned>	
·	-	
1. Emp Last name	6. <unassigned></unassigned>	
1. Emp Last name 2. Emp First name	6. <unassigned> 7. <unassigned></unassigned></unassigned>	
<ol> <li>Emp Last name</li> <li>Emp First name</li> <li>Emp Middle initial</li> </ol>	6. <unassigned> 7. <unassigned> 8. <unassigned></unassigned></unassigned></unassigned>	





Choose Custom Home F	ield for Demographic (MA 🗴
Available fields :	<u>V</u> iew DataForm
Address, Mailing Address, Residence Bargaining unit Citizen City, Mailing City, Residence Date, Ann Base Date, Birth Date, Evaluation Due Date, Fingerprint Date, Fingerprint Date, Long Base Date, Misc Date, Original Hire Date, Prev Seniority Date, Rehire Date, Seniority	
Date, TB Expiration Disabled Email, Home Email, Work Emp First name Emp Gender Emp Last name Emp Middle initial Emp Preferred name Emp Title	
	OK Cancel





