



Human Resource Professional User Guide



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Section I: General System



Home Page

Overview

The People First System home page allows users to access several key areas within the system, including:

- My Quick Links
- My Tasks Due
- My Alerts
- Announcements

Definitions

The following are the definitions of the various areas shown on the home page:

- Announcements – includes information for state employees and retirees. This section is not employee specific. There may be more than one page of announcements. Click the Next link at the bottom of the section to go to the next page.
- Header Links – links on top, right side of home page. Includes Print/ Alerts/ My Timesheet/ EAP/ Contact Us/ and Log Off links to quickly access these pages or functions. Links displayed will vary depending on the user.
- Helpful Websites – includes a list of websites state employees and retirees may frequently use.
- Navigation Tabs – tabs directly under People First logo that allow user to navigate through website to locate content and pages and have a clear indication of their current location in the site (Home/ Employee Information, etc.). Tabs displayed will vary depending on the user.
- My Quick Links – includes the most commonly used screens, including Timesheet and Employee Information.
- My Tasks Due – includes pending tasks specific to the user. The system automatically removes Task messages once completed (when the user logs in the next time). Clicking the link in My Tasks Due takes user to the screen to complete the task.
- My Alerts – displays additional activities in need of completion, or key information. User must manually remove these Alert messages. Note: Some Alert messages have to be removed by the People First Service Center.

Home Page

Authorization

The home page and its functionality are available to all People First users.

Process Steps

In order to access the home page, the user must enter People First through the log in screen and follow the steps below:

Step 1: Enter numeric People First ID in the User ID field.

Step 2: Enter People First password in the Password field.

Step 3: Click the  button.

Internet Browsers

Overview

You can access the People First system using the following Internet browsers - Internet Explorer (IE) 7, IE 8, and Mozilla Firefox (Firefox) 3.5 and earlier. This allows all users, regardless of operating system, to login and use the People First system.

You can access the People First jobsite using IE 7 and IE 8.

Definitions

The following are definitions relevant to this instructional guide:

- Internet browser – Software application used to search and display information from the World Wide Web or private networks.
- SAP – Core application software used by the People First system.

Authorization

This functionality is available to all People First users.

Process Steps

Microsoft personal computer (PC) users can access the People First system using IE 7, IE 8, or Firefox 3.5 and earlier.

Microsoft PC users can access the People First jobsite using IE 7 or IE 8.

Apple computer (a.k.a., Mac) users can access the People First system using Firefox 3.5 and earlier.

For best viewing, set the screen resolution to 1024 x 768.

As new versions of IE and Firefox are released in the future, the People First system will fully support them as SAP releases the necessary software upgrades.

Log In Page

Overview

The People First System Log In page allows users to access several key areas before entering the system, including:

- Communications Message Area
- Helpful Websites
- Job Seekers
- State Employees and Retirees
- Why Work for the State of Florida

Definitions

The following are the definitions of the various areas shown on the Log In page:

- Communication Message Area – is a banner across the top of the log in screen that displays important messages for all People First users.
- Helpful Websites – includes a list of websites state employees, retirees and job seekers may frequently use.
- Job Seekers – allows users to search for and apply to open job vacancies as well as create notification preferences for future vacancies.
- State Employees and Retirees – where users log in to People First to complete timesheets, check benefits, update personal information, etc.
- Why Work for the State of Florida – where users learn about public service and the benefits of working for the State of Florida.

People First
STATE OF FLORIDA HR

Welcome to the People First system!
Check out the new look and the improved features. Contact the People First Service Center if you have questions or need assistance.

Job Seekers

Browse Jobs by Region:

- West
- North
- Central
- South

Browse Jobs by County:

Select a County...
Search

Create an Account:
Save your search criteria, apply for job vacancies, and more.
Create an Account

Returning Visitors:
Log In

Questions?

For help, call (877) 562-7287. Service Center hours are Monday through Friday, 8:00 am. to 6:00 p.m. ET. TTY users call (866) 221-0268.

To print a blank State of Florida employment application, [click here](#).

State Employees and Retirees

Please enter your User ID and Password to access the People First system. Click [FAQ](#) for helpful information.

User ID*

Password*

Log In *Required Field

Log in to People First to:

- Enter Timesheets
- Check Benefits
- Update Address
- View Leave Balances

Forgot Your Password?
Change Your Password

Questions?

For help, call (866) 663-4735. Service Center hours are Monday through Friday, 8:00 am. to 6:00 p.m. ET. TTY users call (866) 221-0268.

Why work for the State of Florida?

Helpful Websites

- [Deferred Compensation](#)
- [Employ Florida](#)
- [Employee Search \(411\)](#)
- [Florida Retirement System](#)
- [MyBenefits](#)
- [MyFlorida.com](#)
- [Payroll Information](#)

Privacy Policy • Accessibility

Log In Page

Authorization

The log in page is available to all World Wide Web users.

Process Steps

In order to access the Log In page, users must enter the following link:
<https://peoplefirst.myflorida.com>.

Password Requirements

Overview

Password requirements for using People First.

Authorization

All users must follow these requirements when creating passwords to log in to the People First system.

Requirements

People First passwords must:

- Contain eight to thirty characters
- Begin with a letter
- Contain at least one upper case letter, one lower case letter, and one number
- Contain no spaces
- Not use the following special characters: ^ = " { }
- Differ from the users old password by at least one character
- Be different from the last 10 passwords used
- Have three different characters in the first three character spaces (e.g., password cannot begin with AAA, bbb, etc.)

Make your People First password stronger by following these tips:

- Select quality passwords which are:
 - Easy for you to remember
 - Not based on anything somebody else could easily guess or obtain using your personal information, such as family or pet names, telephone numbers, birthdays, anniversaries, social security numbers, etc.
 - Free of consecutive, identical characters
- Use a word you can remember, but replace some of the letters with numbers, for example f10r1da!
- Add one or more of the following special characters to make the password more secure: @ \$ % & / () + ? ' ` * ~ # ! - _ . , ; : [] \ < > |
- Keep passwords confidential (don't share with coworkers or family members)
- Avoid keeping a record of passwords (paper, software file or hand held devices)
- Change the password if the user thinks it has been compromised
- Use different passwords for business and personal accounts

Password Requirements

- Don't include passwords in any automated login process, such as storing it in a macro or function key

Process Steps

To change password:

1. Click on Change Your Password

The screenshot shows the People First State of Florida HR website. At the top, there is a navigation bar with the logo and a map of Florida. Below the navigation bar, there is a banner for Open Enrollment starting September 27, 2010. The main content area is divided into two columns. The left column is for Job Seekers, featuring a map of Florida with regions West, North, Central, and South, and options to browse jobs by region or county, create an account, and return as a visitor. The right column is for State Employees and Retirees, featuring a login form with fields for User ID and Password, and links for forgot password and change password. Below the main content, there are sections for 'Why work for the State of Florida?' and 'Helpful Websites' with various links.

2. Complete the fields on the screen and select Logon

The screenshot shows the 'Change Password' page on the People First State of Florida HR website. The page has a header with the logo and a map of Florida. The main content area is titled 'Change Password' and contains the following text: 'You have requested to change your password. Your new password must be 8-30 characters in length. It must begin with a letter, contain at least one upper case letter, one lower case letter and one number. You will not be able to use any of your last 10 passwords. Go to the People First Password Guidelines page for more password requirements.' Below the text, there are four input fields: 'User ID:', 'Password:', 'New Password:', and 'Verify New Password:'. At the bottom of the form, there is a 'Logon' button and a link for 'Forgot your password?'.

Password Requirements

To reset password:

1. Click on Forgot Your Password?

The screenshot shows the People First State of Florida HR website. At the top, there is a navigation bar with the logo and a map of Florida. Below the navigation bar, there is a banner for Open Enrollment starting September 27, 2010. The main content area is divided into two columns. The left column is for Job Seekers, featuring a map of Florida with regions West, North, Central, and South, and a search function by county. The right column is for State Employees and Retirees, featuring a login form with fields for User ID and Password, and a 'Forgot Your Password?' link. Below the main content area, there are sections for 'Why work for the State of Florida?' and 'Helpful Websites'.

2. Complete the fields for each step on the screen and click the Verify button after each step

The screenshot shows the password reset process on the People First State of Florida HR website. It is divided into three steps: Step 1 - Personal Info, Step 2 - Security Question, and Step 3 - New Password. Step 1 requires entering the People First User ID, the last 5 of the Social Security Number, and the date of birth. Step 2 requires entering the answer to a security question. Step 3 requires entering a new password and verifying it. Each step has a 'Verify' button to proceed to the next step.

Security Role Code Screen / Org Code Range Allowance

Overview

Three security role codes ('K', 'U', and 'Y') in the People First system allow agencies to limit the access of an employee to specific Organizational Codes or ranges of Organizational Codes within their agency. These role codes let agencies give their employee's access to data that they have a business need to view or change.

Definitions

'K' role code:

- Agency HR View, without Benefits – Org Code Range Allowance.
- This role is the equivalent of the 'C' role code, only restricted by Org Code Range Allowance.
- No update access.
- View only access to all employee information within the defined Org Code Range Allowance, except for Health and Insurance and Direct Deposit Information.
- All reports except for Health and Insurance Reports.
- Ability to **view** employee information for former agency employees within 60 days of last day employed, within the defined Org Code Range Allowance.
- No access after 60 days.
- Can be assigned to Salary Included, Salary Excluded, OPS Included and OPS Excluded positions.

'U' role code:

- Agency HR – Org Code Range Allowance
- This role is the equivalent of the 'H' role code, only restricted by Org Code Range Allowance.
- Access is restricted by Org Code Range Allowance.
- Full Access (except direct deposit records) for Org Code Range Allowance. Access is limited to the E role for the user's records.
- Full PAR access (create, act upon, complete, reject, intercept, cancel, etc.), for Org Code Range Allowance.
- All reports for Agency within Org Code Range Allowance.
- Ability to **process limited updates** (e.g., process timesheets, approvals, address changes, etc.) for separated agency employees within 60 days of their last day employed at the agency, within the defined Org Code Range Allowance.

Security Role Code Screen / Org Code Range Allowance

- Ability to **view** all employee information for former employees after 60 days of last day employed within the defined Org Code Range Allowance. Ability to **update** limited information (i.e., Addresses and training entry) as long as the employee is not or was not employed in another position, after employment within the defined Org Code Range Allowance.
- Can be assigned to Salary Included, Salary Excluded, OPS Included, OPS Excluded and Benefits Only Entities.

'Y' role code:

- Agency HR with Statewide Benefits View – Org Code Range Allowance.
- This role is the equivalent of the 'X' role code, only restricted by Org Code Range Allowance.
- Full access (except direct deposit records) for Org Code Range Allowance. Access is limited to the E role for the user's records.
- Full PAR access (create, act upon, complete, reject, intercept, cancel, etc.), for Org Code Range Allowance.
- All reports for Agency within Org Code Range Allowance.
- Ability to **process limited updates** (e.g., process timesheets, approvals, address changes, etc.) for separated agency employees within 60 days of their last day employed at the agency, within the defined Org Code Range Allowance.
- Ability to **view** all employee information for former employees after 60 days of last day employed within the defined Org Code Range Allowance. Ability to **update** limited information (i.e., Addresses and training entry) as long as the employee is not or was not employed in another position, after employment within the defined Org Code Range Allowance.
- Can be assigned to Salary Included, Salary Excluded and Benefits Only Entities.

Authorization

This functionality should be used for any position that is assigned the 'K', 'U', or 'Y' role code. Agencies can assign the 'K' and 'U' role codes for the initial setup. The Department of Management Services (DMS) People First Team must assign the 'Y' code.

Process Steps

Follow the steps below to assign the 'K' and 'U' role codes to positions:

Step 1: Go to Org Management, Position Maintenance; select the position, then select Security.

Step 2: Select either "New" or "Edit."

Security Role Code Screen / Org Code Range Allowance

Step 3: Select a role code that allows for an Org Code Range Allowance (i.e., K or U – remember that DMS has to assign the Y role code).

The screenshot shows the 'Security->Detail' window. At the top, 'Effective Date' is set to 07/12/2010 and 'End Date' is set to 12/31/9999. Below this, the 'Role Code' dropdown menu is open, displaying a list of options. The option 'U - Agency HR - Org Code Range Allowance' is selected and highlighted in blue. Other options include B - Requisition Manager & Timekeeper, C - Agency HR View, without Benefits, D - Agency Finance/Accounting & Budget, E - Employee Self Service, H - Agency HR, I - Agency Inspector General, J - Agency Training Coordinator, K - Agency HR View, without Benefits - Org Code Range Allowance, M - Manager Self Service, R - Requisition Manager, T - Timekeeper, and V - Third Party Vendor (Misc Deductions). Buttons for 'Edit', 'Save', and 'Cancel' are visible to the left of the dropdown.

Step 4: Enter the 'From Org Code' and 'To Org Code' values for the first org code range.

Step 5: If only one org code range is desired, select "Save."

Step 6: If multiple org code ranges are desired, select "Insert" and add the next org code range – repeat until all have been added, then select Save."

The screenshot shows the 'Security->Detail' window with the 'Role Code' dropdown set to 'U - Agency HR - Org Code Range Allowance'. Below this is a table with two columns: 'From Org Code' and 'To Org Code'. The table contains three rows of data, each with a unique 16-digit alphanumeric code. Below the table, there are navigation buttons for 'Insert' and 'Remove', and a status indicator 'Row 1 of 3'. At the bottom of the window, there are buttons for 'Edit', 'Save', and 'Cancel'.

From Org Code	To Org Code
72750101000000000000000000	72750101999999999999999999
72201000000000000000000000	72309999999999999999999999
72500000000000000000000000	72599999999999999999999999

Follow the step below to have the 'Y' role code assigned to a position within your agency:

Step 1: The Agency Personnel Officer should send an e-mail to David DiSalvo at david.disalvo@dms.myflorida.com and copy Tommy Wagner at tommy.wagner@dms.myflorida.com. Include the employee name, employee ID, and the org code range or ranges you need assigned to them. The DMS PF Team will process this within 24 hours.

Section V: Reports



Benefits Reports



Benefits Cancellation Report

Overview

Access the Benefits Cancellation Report in the Data Warehouse Reports Module of the People First system. The report identifies employees whose benefit(s) are not paid in full and as a result will not be sent on the carrier files for the next coverage month. You should request the report each month after payroll processing is completed. You can access the data for reporting two business days after the final regular payroll for the month is processed. The Data Warehouse provides the data in this report, which is as of the previous day.

Definitions

The report includes the following fields:

- Org Code – Org code from the employee's position for the selected record
- FLAIR Org – FLAIR org from employee's position for the selected record
- Coverage Period – Benefits coverage period; format MM/YYYY
- Agency Sub Group/Title – Only used for Benefits Only entities
- Coverage Level – Coverage level for the plan type
- Last Name – Employee's last name
- First Name – Employee's first name
- MI – Employee's middle initial
- EMP ID – Employee's People First employee ID (PERNK)
- LOA Status – Leave of Absence (LOA) status of the employee; will be blank if employee is not on LOA
- FTE – Full-time equivalent from the employee's Pay Information record
- Pay Plan Code/Description – Pay plan code (employee subgroup) and title for the selected position record
- Plan Type Desc – Plan type code and title
- Employee Due – Employee contribution due for the insurance plan for the coverage month
- Employee Paid – Employee contribution paid for the insurance plan for the coverage month
- Employee Variance – Underpayment amount for the insurance plan for the coverage month

Filters

The report includes the following filters:

- OLO Code – Required filter; defaults to your agency's OLO code.
- Agency Sub Group – Required filter for Universities and Benefit Only entities only. It will default to 'Select Sub Group' (no sub group selected). The system provides a drop down box of available codes for use. You will need to select your agency sub group.

Benefits Cancellation Report

- Org Code (from – to) – Optional filter; defaults to ‘Select Organization’ (no org code selected) and the system provides a drop down box of available filters. To process the report for one org code, enter the org code in the “from” org code field. To process the report for a range of org codes, enter an org code in both the “from” and “to” org code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- FLAIR Org (from – to) – Optional filter; defaults to ‘Select FLAIR Org’ (no FLAIR Org selected) and the system provides a drop down box of available filters. To process the report for one FLAIR org, enter the FLAIR org in the “from” FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org in both the “from” and “to” FLAIR org fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Budget Entity (from – to) – Optional filter; defaults to ‘Select Budget Entity’ (no budget entity selected) and the system provides a drop down box of available filters. To process the report for one budget entity, enter the budget entity in the “from” budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the “from” and “to” budget entity fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Employee ID – Optional filter. Report defaults to all employees in the filter criteria (OLO, Org Code, etc.). To process the report for one employee, enter the employee ID (PERNK).
- Plan Type (from – to) – Optional filter; defaults to ‘Select Plan Type’ (no Plan Type selected) and the system provides a drop down box of available filters. To process the report for one plan type, enter the plan type in the “from” plan type field. To process the report for a range of plan types, enter a plan type in both the “from” and “to” plan type fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Coverage Begin Date – Required filter. Must be the first day of the next coverage month. Format is MM/DD/YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/01/2010
- Coverage End Date – Required filter. Must be the last day of the next coverage month. Format is MM/DD/YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/31/2010.
- Report Format – Required filter; will default to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Sort Hierarchy

The report uses the following sort sequence:

- Coverage Period
- FLAIR Org
- Employee Last Name
- Employee First Name
- EMP ID
- Plan Type Code

Benefits Cancellation Report

Totals

The report provides the following totals:

- Employee count totals are provided at the end of the report for number of employees included in the report.

Authorization

Users with a security role code of A, G, H, I, N, S, U, X, and Y will be able to process this report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Benefits Reports

Step 2: Select the Benefit Cancellation Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window remains blank until the report results display. The results may take a while to display depending on the report and the selected filters. You can print or save the PDF file once the report displays. A blank report displays if no data is available for the report selection criteria.

For Excel, the report selection criteria screen remains on the screen until the report results display. The results may take a while to display depending on the report and the selected filters. Click the "Download to Excel" link to export to Excel once the results display. While the PDF reports are formatted for printing, the Excel reports are unformatted so you can work with the data as needed. If no data is available for the selected report criteria, you will see a message indicating "No records found for selection. Please verify selection criteria."

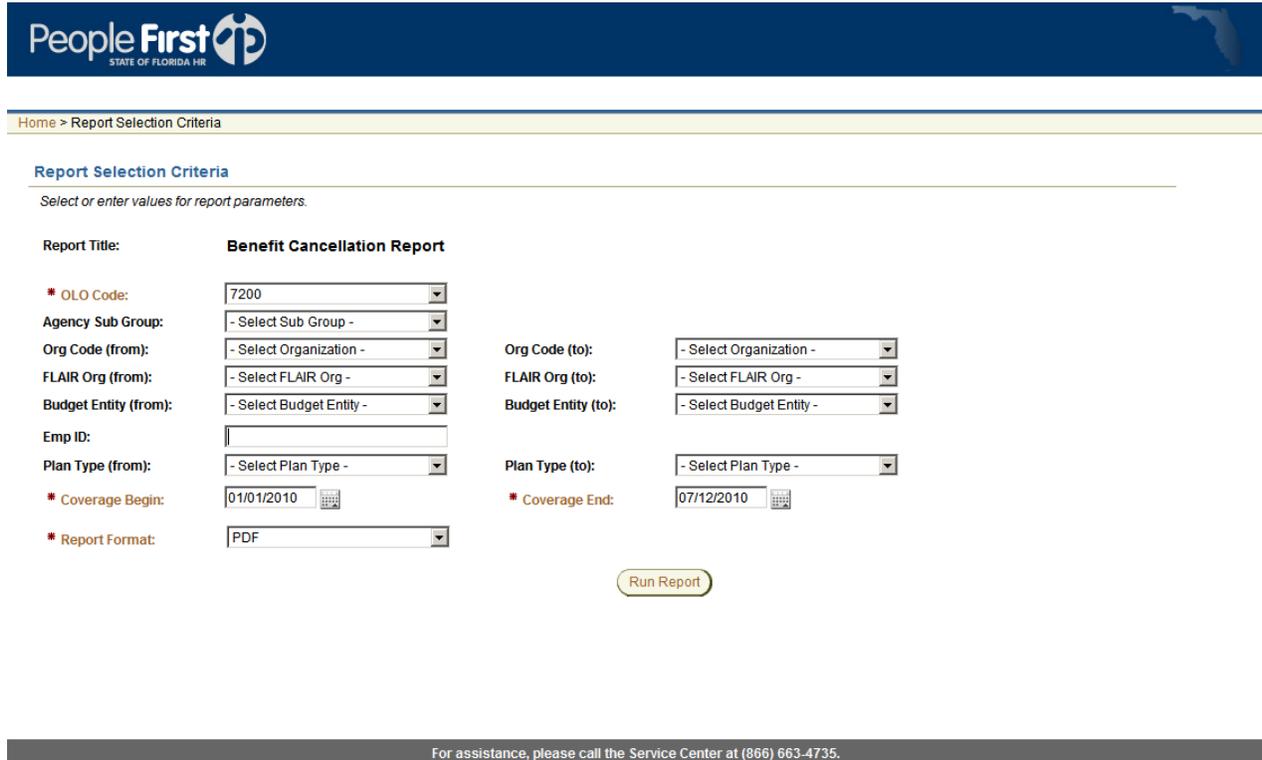
If you skip a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: "Errors have occurred" and a red X displays next to the filter that you need to correct. Correct the filters and select the Run Report button.

Benefits Cancellation Report

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:



Home > Report Selection Criteria

Report Selection Criteria

Select or enter values for report parameters.

Report Title: **Benefit Cancellation Report**

* OLO Code: 7200

Agency Sub Group: - Select Sub Group -

Org Code (from): - Select Organization -

FLAIR Org (from): - Select FLAIR Org -

Budget Entity (from): - Select Budget Entity -

Emp ID:

Plan Type (from): - Select Plan Type -

* Coverage Begin: 01/01/2010

* Report Format: PDF

Org Code (to): - Select Organization -

FLAIR Org (to): - Select FLAIR Org -

Budget Entity (to): - Select Budget Entity -

Plan Type (to): - Select Plan Type -

* Coverage End: 07/12/2010

[Run Report](#)

For assistance, please call the Service Center at (866) 663-4735.

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Benefits Cancellation Report:

BENEFITS CANCELLATION REPORT
DEPARTMENT OF MANAGEMENT SERVICES

People First
STATE OF FLORIDA HR

RUN DATE: 07/12/2010
PAGE: 1

ORG CODE	FLAIR ORG	COVERAGE PERIOD	AGENCY SUB-GROUP/TITLE	FTE	PAY PLAN CODE / DESCRIPTION	COVERAGE LEVEL	DUE	EMPLOYEE PAID	VARIANCE
LAST NAME	FIRST NAME MI	EMP ID	LOA STATUS			PLAN TYPE - DESC			
673030204610003700000000	67303005200	02/2010		1.00	08 SES	0001-BASIC LIFE 1000 BASIC LIFE	\$2.93	\$0.00	-\$2.93
72400409010000000000000000	72400113020	02/2010		.50	01 CAREER SERVICE	0001-BASIC LIFE 1000 BASIC LIFE	\$1.47	\$1.23	-\$0.24
72400409310000000000000000	72400113090	02/2010		1.00	01 CAREER SERVICE	0009-FAMILY 0000 HEALTH	\$180.00	\$0.00	-\$180.00
72620200000000000000000000	72600402200	02/2010		1.00	08 SES	0001-BASIC LIFE 1000 BASIC LIFE	\$2.18	\$1.23	-\$0.95
72620300000000000000000000	72600402400	02/2010		1.00	01 CAREER SERVICE	0001-BASIC LIFE 1000 BASIC LIFE	\$2.18	\$1.23	-\$0.95
72620300000000000000000000	72600402400	02/2010		1.00	01 CAREER SERVICE	0001-BASIC LIFE 1000 BASIC LIFE	\$2.93	\$0.00	-\$2.93
72620300000000000000000000	72600402400	02/2010		1.00	08 SES	0001-BASIC LIFE 1000 BASIC LIFE	\$3.65	\$0.00	-\$3.65
72780104000000000000000000	72750301140	02/2010		.50	08 SES	0001-BASIC LIFE 1000 BASIC LIFE	\$3.03	\$2.28	-\$0.75
72920402000000000000000000	72902450210	02/2010		1.00	01 CAREER SERVICE	0001-BASIC LIFE 1000 BASIC LIFE	\$2.79	\$1.64	-\$1.15
EMPLOYEE COUNT: 7									

Benefits Changes Report

Overview

Access the Benefits Changes Report in the Data Warehouse Reports Module of the People First system. The report identifies employees who have made changes to their benefit(s). You can request the report from July 2010, forward. The Data Warehouse provides the data in this report, which is as of the previous day and not future dates. If a change is made today for current or a past coverage month, it would appear on the report tomorrow. If a change is made today for a future coverage month, it will not appear on the report until the first of that month.

Definitions

The report includes the following fields:

- Org Code – Org code from the employee's position for the selected record
- FLAIR Org – FLAIR org from employee's position for the selected record
- Last Name – Employee's last name
- First Name – Employee's first name
- MI – Employee's middle initial
- EMP ID – Employee's People First employee ID (PERNK)
- Pay Plan Code & Description – Pay plan code (employee subgroup) and title for the selected position record
- Class Code – Class Code for the selected position record
- FTE – Full-time equivalent from the employee's Pay Information record
- Plan Type Description – Plan type code and title
- Old Benefit Plan – Benefit plan code and title for the plan type prior to change
- New Benefit Plan – Benefit plan code and title for the new election
- Old Coverage – Coverage level for the plan type prior to the change
- New Coverage – Coverage level for the plan type for the new election
- Old EE Cost – Employee contribution due for the insurance plan for the coverage month prior to the change
- New EE Cost – Employee contribution due for the insurance plan for the coverage month for the new election
- Old ER Cost – Employer contribution due for the insurance plan for the coverage month prior to the change
- New ER Cost – Employer contribution due for the insurance plan for the coverage month for the new election
- Effective Date – Date the coverage became effective for the coverage level for the employee

Benefits Changes Report

- Event Type – Qualified Status Change (QSC) event that allowed the employee to make the change

Filters

The report includes the following filters:

- OLO Code – Required filter; defaults to your agency's OLO code.
- Agency Sub Group – Required filter for Universities and Benefit Only entities only. It will default to 'Select Sub Group' (no sub group selected). System provides a drop down box of available codes for use. You will need to select your agency sub group.
- Org Code (from – to) – Optional filter; defaults to 'Select Organization' (no org code selected) and system provides a drop down box of available filters. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- FLAIR Org (from – to) – Optional filter; defaults to 'Select FLAIR Org' (no FLAIR Org selected) and system provides a drop down box of available filters. To process the report for one FLAIR org, enter the FLAIR org in the "from" FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org in both the "from" and "to" FLAIR org fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Budget Entity (from – to) – Optional filter; defaults to 'Select Budget Entity' (no budget entity selected) and system provides a drop down box of available filters. To process the report for one budget entity, enter the budget entity in the "from" budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the "from" and "to" budget entity fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Employee ID – Optional filter. Report defaults to all employees in the filter criteria (OLO, Org Code, etc.). To process the report for one employee enter the employee ID (PERNK).
- Coverage Begin Date – Required filter. Must be the first day of the coverage month. Format is MM\DD\YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/01/2010.
- Coverage End Date – Required filter. Must be the last day of the coverage month. Format is MM\DD\YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/31/2010.
- Report Format – Required filter; will default to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Sort Hierarchy

The report uses the following sort sequence:

- Coverage Period
- FLAIR Org
- Employee Last Name

Benefits Changes Report

- Employee First Name
- EMP ID
- Plan Type Code

Totals

The report provides the following totals:

- Employee count totals are provided at the end of the report for number of employees included in the report.

Authorization

Users with a security role code of A, G, H, I, N, S, U, X, and Y will be able to process this report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Benefits Reports

Step 2: Select the Benefit Changes Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window remains blank until the report results display. The results may take a while to display depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report displays if no data is available for the report selection criteria.

For Excel, the report selection criteria screen remains on the screen until the report results display. The results may take a while to display depending on the report and the selected filters. Click the "Download to Excel" link to export to Excel once the results display. While the PDF reports are formatted for printing, the Excel reports are unformatted so you can work with the data as needed. If no data is available for the selected report criteria, you will see a message indicating "No records found for selection. Please verify selection criteria."

If you skip a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: "Errors have occurred" and a red X displays next to the filter that you need to correct. Correct the filters and select the Run Report button.

Benefits Changes Report

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

Home > Report Selection Criteria

Report Selection Criteria

Select or enter values for report parameters.

Report Title: **Benefit Changes Report**

* **OLO Code:**

Agency Sub Group:

Org Code (from):

FLAIR Org (from):

Budget Entity (from):

Emp ID:

* **Begin Date:**

* **Report Format:**

Org Code (to):

FLAIR Org (to):

Budget Entity (to):

* **End Date:**

For assistance, please call the Service Center at (866) 663-4735.

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Benefit Changes Report:

RUN DATE: 07/12/2010
PAGE: 1

BENEFITS CHANGES REPORT
DEPARTMENT OF MANAGEMENT SERVICES

ORG CODE	FLAIR ORG	LAST NAME	FIRST NAME	MI	EMP ID	PAY PLAN	CLASS	FTE		
PLAN TYPE DESCRIPTION	OLD BENEFIT PLAN	NEW BENEFIT PLAN	OLD COVERAGE	NEW COVERAGE	OLD EE COST	NEW EE COST	DESCRIPTION	CODE	EFF DATE	EVENT TYPE
72750106001000000000000000	72750106001					08 SES		2107	06/24/2010	1.00
MRA		MEDICAL REIMBURSE ACCT		1200.00	\$0.00	\$192.51		\$0.00		BIRTH OR ADOPTION
72750106001000000000000000	72750106001					08 SES		2107	06/24/2010	1.00
DCRA		DEPENDENT CARE REIMBURSE ACCT		2000.00	\$0.00	\$320.86		\$0.00		BIRTH OR ADOPTION
72750101000000000000000000	72750200800					08 SES		0714	06/28/2010	1.00
HEALTH	CAPITAL HEALTH PLAN HMO	CAPITAL HEALTH PLAN HMO	FAMILY	FAMILY	\$0.00	\$0.00	\$1,184.14	\$1,184.14		BIRTH OR ADOPTION
72750101000000000000000000	72750200800					08 SES		0714	06/28/2010	1.00
DENTAL	COMPBENEFITS NETWORK PLUS#4004	COMPBENEFITS NETWORK PLUS#4004	EMPLOYEE + FAMILY	EMPLOYEE + FAMILY	\$48.70	\$48.70	\$0.00	\$0.00		BIRTH OR ADOPTION

Benefits Early Effective Date Report

Overview

Access the Benefits Early Effective Date Report in the Management Reports Module of the People First system. The report identifies employees who have selected an early effective date for Health and Insurance elections. The report is based on election date, not coverage effective date. You can request the report from January 1, 2010, forward. The People First System provides the data in this report, which has data as of the time the report is processed.

Definitions

The report includes the following fields:

- Emp ID – Employee's People First employee ID (PERNK)
- First Name – Employee's first name
- MI – Employee's middle initial
- Last Name – Employee's last name
- Plan Type – Code and description for the insurance plan type
- Benefit Plan – Code and description for the benefit plan
- Coverage Level – Code and description for the coverage level
- Coverage Effective Date – Date the coverage became effective for the coverage level for the employee
- Employee Cost – Amount the employee pays each month for the benefit plan
- Employer Cost – Amount the employer pays for the employee each month of the benefit plan
- Event Type Description – Qualified Status Change (QSC) event that allowed the employee to choose an early effective date

Filters

The report uses the following filters:

- OLO – Required filter; defaults to your agency's OLO code.
- Employee ID (from – to) – Optional filter. Report defaults to all employees in the filter criteria (OLO, Org Code, etc.). To process the report for one employee, enter the employee ID (PERNK) in the "from" employee ID field. To process the report for a range of employees, enter an employee ID (PERNK) in both the "from" and "to" employee ID fields.
- Org Code (from – to) – Optional filter. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields.
- Plan type (from – to) – Optional filter. To process the report for one plan type enter the plan type in the "from" plan type field. To process the report for a range of plan types, enter a plan type in both the "from" and "to" plan type fields.

Benefits Early Effective Date Report

- Benefit Plan (from – to) – Optional filter. To process the report for one benefit plan enter the benefit plan in the “from” benefit plan field. To process the report for a range of benefit plans, enter a benefit plan in both the “from” and “to” benefit plan fields.
- Enrollment Date (from – to) – Required filter. Note this is the date the enrollment was elected, not the coverage effective date. To process the report for one enrollment date enter the enrollment date in the “from” enrollment date field. To process the report for a range of enrollment dates enter an enrollment date in both the “from” and “to” enrollment date fields.

Sort Hierarchy

The report uses the following sort sequence:

- Org Code
- FLAIR Org
- Employee Last Name
- Employee First Name
- EMP ID

Authorization

Users with a security role code of A, G, H, I, N, S, U, X, and Y will be able to process this report.

Process Steps

Step 1: Select Management; Reports; Benefits Reports

Step 2: Select the Benefits Early Effective Date Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

If the report finishes in **less** than three minutes, the report details display in a grid at the bottom of the report selection screen. To view the report in PDF, select the View PDF button. To view the report in Excel, select the Export to Microsoft Excel link. PDF reports are formatted for printing, while the Excel reports are unformatted so the user can work with the data as needed.

If the report takes **more** than three minutes, you will receive a message that the report is taking longer than three minutes and to access the report in the “My Reports” screen. Generally, you will be able to access the report in the “My Reports” screen within 15 to 20 minutes. The “My Reports” screen is located on the Reports menu.

If there is no data available for the report criteria, you will receive a message stating “No data found for selection.” If you enter an invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to the data.

Benefits Early Effective Date Report

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

Benefits Early Effective Date Report

Selection Area
 OLO:

Range Selection

Employee ID: To

Org Code: To

Plan type: To

Benefit plan: To

Enrollment Date: * To

[Menu](#) [Run Report](#) [View PDF](#)

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of an Adobe Acrobat (PDF) report:

BENEFITS EARLY EFFECTIVE DATE REPORT
DEPARTMENT OF MANAGEMENT SERVICES

RUN DATE: 07/09/2010 11:31:17 AM
PAGE: 1

EMP ID	FIRST NAME	MI	LAST NAME	COVERAGE EFFECTIVE DATE	PLAN TYPE	BENEFIT PLAN	COVERAGE LEVEL	EMPLOYEE COST	EMPLOYER COST	EVENT TYPE DESCRIPTION
				03/01/2009	1000 - BASIC LIFE	1001 - BASIC LIFE MINNESOTA	0001 - BASIC LIFE	8.82	0.00	
				03/01/2010	0000 - HEALTH	0640 - VISTA HEALTHPLANS HMO	0000 - FAMILY	1,127.74	0.00	LAYOFF RET>1Y,NO COV
				03/01/2010	3000 - VISION	3004 - HUMANA VISION - EXAM-MATERIALS	0014 - EMPLOYEE + SPOUSE	11.56	0.00	SP EMP CHG COV-ADD
				03/01/2010	4000 - DENTAL	4004 - COMPBENEFITS NETWORK PLUS#4004	0014 - EMPLOYEE + SPOUSE	31.98	0.00	SP EMP CHG COV-ADD
				01/01/2010	0000 - HEALTH	0400 - CAPITAL HEALTH PLAN HMO	0000 - FAMILY	180.00	947.74	NEW HIRE
				02/01/2010	4000 - DENTAL	4004 - COMPBENEFITS NETWORK PLUS#4004	0020 - EMPLOYEE + FAMILY	48.70	0.00	NEW HIRE
				02/01/2010	1000 - BASIC LIFE	1001 - BASIC LIFE MINNESOTA	0001 - BASIC LIFE	1.39	4.83	NEW HIRE

Benefits Underpayment/Overpayment Report

Overview

Access the Benefits Underpayment/Overpayment Report in the Data Warehouse Reports Module of the People First system. The report identifies employees whose benefit(s) are either underpaid or overpaid for the requested coverage period. You can request the report from January 1, 2005, forward. The Data Warehouse provides the data for the report, which is as of the previous day.

Definitions

The report includes the following fields:

- Org Code – Org code from the employee’s position for the selected record
- FLAIR Org Code – FLAIR org from employee’s position for the selected record
- Coverage Period – Benefits coverage period; format MM/YYYY
- Agency Sub-Group/Title – Only used for Benefits Only entities
- Coverage Level – Coverage level for the plan type
- Last Name – Employee’s last name
- First Name – Employee’s first name
- EMP ID – Employee’s People First employee ID (PERNK)
- SSN – Employee’s Social Security Number
- FTE – Full-time equivalent from the employee’s Pay Information record
- FLAIR Acct Code – FLAIR account from employee’s position for the selected record
- Pay Plan Code/Desc – Pay plan code (employee subgroup) and title for the selected position record
- Plan Type Description – Plan type code and title
- Employee Due – Employee contribution due for the insurance plan for the coverage month
- Employee Paid – Employee contribution paid for the insurance plan for the coverage month
- Employee Variance – Underpayment or overpayment amount for the insurance plan for the coverage month by the employee
- Employer Due – Employer contribution due for the insurance plan for the coverage month
- Employer Paid – Employer contribution paid for the insurance plan for the coverage month
- Employer Variance – Underpayment or overpayment amount for the insurance plan for the coverage month by the employer

Benefits Underpayment/Overpayment Report

Filters

The report includes the following filters:

- OLO Code – Required filter; defaults to your agency’s OLO code.
- Agency Sub Group – Required filter for Universities and Benefit Only entities only. It will default to ‘Select Sub Group’ (no sub group selected). The system provides a drop down box of available codes. Select your agency sub group.
- Org Code (from – to) – Optional filter; defaults to ‘Select Organization’ (no org code selected) and a drop down box of available filters is provided. To process the report for one org code, enter the org code in the “from” org code field. To process the report for a range of org codes, enter an org code in both the “from” and “to” org code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- FLAIR Org (from – to) – Optional filter; defaults to ‘Select FLAIR Org’ (no FLAIR Org selected) and the system provides a drop down box of available filters. To process the report for one FLAIR org, enter the FLAIR org in the “from” FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org in both the “from” and “to” FLAIR org fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Budget Entity (from – to) – Optional filter; defaults to ‘Select Budget Entity’ (no budget entity selected) and the system provides a drop down box of available filters. To process the report for one budget entity, enter the budget entity in the “from” budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the “from” and “to” budget entity fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Employee ID – Optional filter. Report defaults to all employees in the filter criteria (OLO, Org Code, etc.). To process the report for one employee, enter the employee ID (PERNK).
- Plan Type (from – to) – Optional filter; defaults to ‘Select Plan Type’ (no Plan Type selected) and the system provides a drop down box of available filters. To process the report for one plan type, enter the plan type in the “from” plan type field. To process the report for a range of plan types, enter a plan type in both the “from” and “to” plan type fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Coverage Begin Date – Required filter. Must be the first day of the coverage month. Format is MM\DD\YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/01/2010.
- Coverage End Date – Required filter. Must be the last day of the coverage month. Format is MM\DD\YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/31/2010.
 - Important note: Coverage Begin and End Dates can be a range of coverage months instead of just one month. If processing for more than one month, enter the first day of the first coverage month in the coverage begin date and enter the last day of the last coverage month in the coverage end date.

Benefits Underpayment/Overpayment Report

- Report Format – Required filter; will default to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Sort Hierarchy

The report uses the following sort sequence:

- Coverage Period
- FLAIR Org
- Employee Last Name
- Employee First Name
- EMP ID
- Plan Type Code

Totals

The report provides the following totals:

- Plan counts are provided at the end of the report for the number of employees in each of the plans included in the report.
- Employee count totals are provided at the end of the report for number of employees included in the report.

Authorization

Users with a security role code of A, G, H, I, N, S, U, X, and Y will be able to process this report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Benefits Reports

Step 2: Select the Benefit Underpayment/Overpayment Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window remains blank until the report results display. The results may take a while to display depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report displays if no data is available for the report selection criteria.

For Excel, the report selection criteria screen remains on the screen until the report results display. The results may take a while to display depending on the report and the selected filters. Click the “Download to Excel” link to export to Excel once the results are displayed. While the PDF reports are formatted for printing, the Excel reports are unformatted so the user can work with the data as needed. If no data is available for the selected report criteria, you will see a message indicating “No records found for selection. Please verify selection criteria.”

If you skip a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: “Errors have

Benefits Underpayment/Overpayment Report

occurred” and a red X displays next to the filter that you need to correct. Correct the filters and select the Run Report button.

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

The screenshot shows a web interface for selecting report criteria. At the top left is the 'People First STATE OF FLORIDA HR' logo. Below it is a breadcrumb trail: 'Home > Report Selection Criteria'. The main heading is 'Report Selection Criteria' with a sub-instruction: 'Select or enter values for report parameters.' The form is titled 'Benefits Underpayment/Overpayment Report' and contains the following fields:

- Report Title:** Benefits Underpayment/Overpayment Report
- * OLO Code:** 7200
- Agency Sub Group:** - Select Sub Group -
- Org Code (from):** - Select Organization -
- FLAIR Org (from):** - Select FLAIR Org -
- Budget Entity (from):** - Select Budget Entity -
- Emp ID:** (empty text box)
- Plan Type (from):** - Select Plan Type -
- * Coverage Begin Date:** 01/01/2010
- * Report Format:** PDF
- Org Code (to):** - Select Organization -
- FLAIR Org (to):** - Select FLAIR Org -
- Budget Entity (to):** - Select Budget Entity -
- Plan Type (to):** - Select Plan Type -
- * Coverage End Date:** 07/12/2010

A 'Run Report' button is located at the bottom center of the form. At the bottom of the page, a footer reads: 'For assistance, please call the Service Center at (866) 663-4735.'

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Benefits Underpayment/Overpayment Report:

Benefits Underpayment/Overpayment Report

**BENEFITS
UNDERPAYMENT / OVERPAYMENT REPORT
DEPARTMENT OF MANAGEMENT SERVICES**



RUN DATE: 07/12/2010
PAGE: 1

ORG CODE	FLAIR ORG CODE FLAIR ACCT CODE	COVERAGE PERIOD	AGENCY SUB- GROUP/TITLE	COVERAGE LEVEL PAY PLAN CODE/DESC	PLAN TYPE - DESC	LAST NAME	FIRST NAME	EMP ID	EMPLOYEE PAID	SSN	FTE	EMPLOYER		
												DUE	PAID	VARIANCE
673030204610003700000000	67303005200 67101000329671002000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE						1.00			
72010103000000000000000000	72010101892 72202021027720101000001000000	02/2010	0001	0009-FAMILY	0000 HEALTH				\$2.93	\$0.00	-2.93	\$9.77	\$16.94	\$7.17
72400403020000000000000000	72400112300 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$0.00	\$0.00	\$0.00	\$563.67	\$845.81	\$281.94
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0009-FAMILY	0000 HEALTH				\$1.39	\$1.39	\$0.00	\$4.63	\$0.00	-\$4.63
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0009-FAMILY	0000 HEALTH				\$0.00	\$180.00	\$180.00	\$1,127.74	\$947.74	-\$180.00
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$0.00	\$180.00	\$180.00	\$1,127.74	\$947.74	-\$180.00
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$0.99	\$3.00	\$2.01	\$3.29	\$9.90	\$6.61
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$0.00	\$1.28	\$1.28	\$7.33	\$4.24	-\$3.09
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$0.00	\$1.28	\$1.28	\$7.33	\$4.24	-\$3.09
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0014-EMPLOYEE + SPOUSE	4000 DENTAL				\$16.22	\$24.10	\$7.88	\$0.00	\$0.00	\$0.00
72400409000200000000000000	72400113002 72602696001724001000001000000	02/2010	0001	0014-EMPLOYEE + SPOUSE	4000 DENTAL				\$16.22	\$24.10	\$7.88	\$0.00	\$0.00	\$0.00
72400409010000000000000000	72400113000 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$1.47	\$1.23	-\$0.24	\$0.92	\$0.76	-\$0.16
72400409310000000000000000	72400113090 72602696001724001000001000000	02/2010	0001	0009-FAMILY	0000 HEALTH				\$180.00	\$0.00	-\$180.00	\$947.74	\$563.86	-\$383.88
72400409200000000000000000	72400113110 72602696001724001000001000000	02/2010	0001	0009-FAMILY	0000 HEALTH				\$0.00	\$90.00	\$90.00	\$563.67	\$755.81	\$191.94
72400411030000000000000000	72400114020 72602696001724001000001000000	02/2010	0001	0001-INDIVIDUAL	0000 HEALTH				\$0.00	\$0.00	\$0.00	\$498.68	\$997.36	\$498.68
72400411030000000000000000	72400114020 72602696001724001000001000000	02/2010	0001	0001-BASIC LIFE	1000 BASIC LIFE				\$0.00	\$0.00	\$0.00	\$15.07	\$30.16	\$15.09

Dependent Documentation Report

Overview

Access the Dependent Documentation Report in the Management Reports Module of the People First system. The report identifies employees who need to provide documentation for one or more of their dependent(s). The People First System provides the data in this report, which has data as of the time the report is processed.

Fields

The report includes the following fields:

- Sub Agency – Used only for Benefit-Only entities
- Org Code – Org code from the employee's position for the selected record
- FLAIR Org – FLAIR org from employee's position for the selected record
- Emp ID – Employee's People First employee ID (PERNK)
- First Name – Employee's first name
- Last Name – Employee's last name
- MI – Employee's middle initial
- Dependent SSN – Dependent's Social Security number
- Dependent First Name – Dependent's first name
- Dependent Last Name – Dependent's last name
- Dependent Birth Date – Dependent's date of birth
- Dependent Relationship – Dependent's relationship to the subscriber
- Documentation Type Needed – Documentation type that must be provided
- Documentation Due Date – Date the documentation is due for the employee's dependent (60 days after the dependent is registered into the People First system)
- Dependent Enrolled – Indicates if the dependent is covered under any of the employee's benefit plans (Y means yes and N means no)

Filters

The report uses the following filters:

- Agency – Required filter; defaults to your agency's OLO code.
- Org Code (from – to) – Optional filter. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields.
- FLAIR Org (from – to) – Optional filter. To process the report for one FLAIR org code, enter the FLAIR org code in the "from" FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org code in both the "from" and "to" FLAIR org fields.

Dependent Documentation Report

Sort Hierarchy

The report uses the following sort sequence:

- Org Code
- FLAIR Org
- Employee Last Name
- Employee First Name
- EMP ID

Authorization

Users with a security role code of A, G, H, I, N, S, U, X, and Y will be able to process this report.

Process Steps

Step 1: Select Management; Reports; Benefits Reports

Step 2: Select the Dependent Documentation Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

If the report finishes in **less than three minutes**, the report details display in a grid at the bottom of the report selection screen. To view the report in PDF, select the View PDF button. To view the report in Excel, select the Export to Microsoft Excel link. PDF reports are formatted for printing, while the Excel reports are unformatted so the user can work with the data as needed.

If the report takes **more than three minutes**, you will receive a message that the report is taking longer than three minutes and to access the report in the “My Reports” screen. Generally, you will be able to access the report in the “My Reports” screen within 15 to 20 minutes. The “My Reports” screen is located on the Reports menu.

If there is no data available for the report criteria, you will receive a message stating “No data found for selection.” If you enter an invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to the data.

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

The screenshot shows a web interface titled "Dependent Documentation". It features a "Selection Area" with an "Agency" dropdown menu set to "7200". Below this is a "Range Selection" section with two rows of input fields: "Org Code" and "FLAIR Organization", each with a "To" field. At the bottom, there are three buttons: "Menu", "Run Report", and "View PDF".

Dependent Documentation Report

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of an Adobe Acrobat (PDF) report:

RUN DATE: 07/14/2010 14:13:52
PAGE: 1

DEPENDENT DOCUMENTATION REPORT
DEPARTMENT OF MANAGEMENT SERVICES



SUB AGENCY	ORG CODE	FLAIR ORG	EMP ID	LAST NAME	FIRST NAME	MI	DEPENDENT SSN	DEPENDENT LAST NAME	DEPENDENT FIRST NAME	DEPENDENT BIRTH DATE	DEPENDENT RELATION	DOCUMENTATION TYPE NEEDED	DOCUMENTATION DUE DATE	DEPENDENT ENROLLED
0001	720101030000000000000000	72010101800								08/21/1994	CHILD	DEPENDENT DOCUMENT	06/25/2005	Y
0001	720101030000000000000000	72010101800								04/27/1993	CHILD	DEPENDENT DOCUMENT	06/25/2005	Y
0001	720101030000000000000000	72010101800								11/30/1965	SPOUSE	MARRIAGE CERTIFICATE	06/25/2005	Y
0001	720101030000000000000000	72010101892								12/08/1958	SPOUSE	MARRIAGE CERTIFICATE	03/06/2010	Y
0001	720102000000000000000000	72010103000								07/31/1983	CHILD	DEPENDENT DOCUMENT	12/30/2005	N
0001	720106000000000000000000	72010106000								04/14/2010	CHILD	DEPENDENT DOCUMENT	06/06/2010	Y
0001	720202010000000000000000	72010111000								02/14/1982	CHILD	DEPENDENT DOCUMENT	12/07/2004	N
0001	724003020000000000000000	72400120020								06/20/1953	SPOUSE	MARRIAGE CERTIFICATE	05/09/2008	Y
0001	724004010000000000000000	72400113090								11/02/2003	CHILD	DEPENDENT DOCUMENT	02/09/2010	Y
0001	724004010000000000000000	72400113090								05/19/1998	FOSTER CHILD	DEPENDENT DOCUMENT	02/09/2010	Y
0001	724004010000000000000000	72400113090								07/23/1973	SPOUSE	MARRIAGE CERTIFICATE	03/26/2006	Y

Premium History Report

Overview

Access the Premium History Report in the Data Warehouse Reports Module of the People First system. The report identifies premium activity for employee benefit(s) for a requested coverage period. You can request the report from January 1, 2005, forward. The Data Warehouse provides the data for the report, which is as of the previous day.

Definitions

The report includes the following fields:

- FLAIR Org – FLAIR org from employee's position for the selected record
- FLAIR Acct Code – FLAIR account from employee's position for the selected record
- Agency Sub Group – Only used for Benefits Only entities and will display the Benefits Only title
- EMP ID – Employee's People First employee ID (PERNK)
- First Name – Employee's first name
- MI – Employee's middle initial
- Last Name – Employee's last name
- Pay Plan – Pay plan code (employee subgroup) and title for the selected position record
- Class Code – Class code for the selected position record
- FTE – Full-time equivalent from the employee's Pay Information record
- Plan Type – Plan type title
- Benefit Plan – Benefit Plan title for the plan type
- Coverage Level – Coverage level for the plan type
- Coverage Period – Benefits coverage period; format MM/DD/YYYY
- Warrant Date – Date the payment was made; formatted MM/DD/YYYY
- Payment Source – How the payment was made (e.g. payroll deduction, payroll on demand, payroll cancellation, manual, etc.)
- Trans Date – Date the payment was entered in the People First system; formatted MM/DD/YYYY
- Employee Paid – Employee contribution paid for the insurance plan for the coverage month
- Employer Paid – Employer contribution paid for the insurance plan for the coverage month

Filters

The report includes the following filters:

- OLO Code – Required filter; defaults to your agency's OLO code.

Premium History Report

- Agency Sub Group – Required filter for Universities and Benefit Only entities only. It will default to 'Select Sub Group' (no sub group selected). The system will provide a drop down box of available codes for use. Select your agency sub group.
- Org Code (from – to) – Optional filter; defaults to 'Select Organization' (no org code selected) and the system provides a drop down box of available filters. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- FLAIR Org (from – to) – Optional filter; defaults to 'Select FLAIR Org' (no FLAIR Org selected) and the system provides a drop down box of available filters. To process the report for one FLAIR org, enter the FLAIR org in the "from" FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org in both the "from" and "to" FLAIR org fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Budget Entity (from – to) – Optional filter; defaults to 'Select Budget Entity' (no budget entity selected) and the system provides a drop down box of available filters. To process the report for one budget entity, enter the budget entity in the "from" budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the "from" and "to" budget entity fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Employee ID – Optional filter. Report defaults to all employees in the filter criteria (OLO, Org Code, etc.). To process the report for one employee enter the employee ID (PERNK).
- Plan Type (from – to) – Optional filter; defaults to 'Select Plan Type' (no Plan Type selected) and the system provides a drop down box of available filters. To process the report for one plan type, enter the plan type in the "from" plan type field. To process the report for a range of plan types, enter a plan type in both the "from" and "to" plan type fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Coverage Begin Date – Required filter. Must be the first day of the coverage month. Format is MM\DD\YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/01/2010.
- Coverage End Date – Required filter. Must be the last day of the coverage month. Format is MM\DD\YYYY. For example, if requesting the report for the December 2010 coverage period, enter 12/31/2010.
 - Important note: Coverage Begin and End Dates can be a range of coverage months instead of just for one month. If processing for more than one month, enter the first day of the first coverage month in the coverage begin date and enter the last day of the last coverage month in the coverage end date.
- Report Format – Required filter; will default to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Premium History Report

Sort Hierarchy

The report uses the following sort sequence:

- Coverage Period
- FLAIR Org
- Employee Last Name
- Employee First Name
- EMP ID
- Plan Type Code

Totals

The report provides the following totals:

- Employee count totals are provided at the end of the report for number of employees included in the report.

Authorization

Users with a security role code of A, G, H, I, N, S, U, X, and Y will be able to process the report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Benefits Reports

Step 2: Select the Premium History Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window remains blank until the report results display. The results may take a while to display depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report displays if there is no data available for the report selection criteria.

For Excel, the report selection criteria screen remains on the screen until the report results display. The results may take a while to display depending on the report and the selected filters. Click the "Download to Excel" link to export to Excel once the results are displayed. While the PDF reports are formatted for printing, the Excel reports are unformatted so you can work with the data as needed. If no data is available for the selected report criteria, you will see a message indicating "No records found for selection. Please verify selection criteria."

If you skip a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: "Errors have occurred" and a red X displays next to the filter that you need to correct. Correct the filters and select the Run Report button.

Premium History Report

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

Home > Report Selection Criteria

Report Selection Criteria

Select or enter values for report parameters.

Report Title: **Premium History Report**

* OLO Code:

Agency Sub Group:

Org Code (from):

FLAIR Org (from):

Budget Entity (from):

Emp ID:

Plan Type (from):

* Coverage Begin:

* Report Format:

Org Code (to):

FLAIR Org (to):

Budget Entity (to):

Plan Type (to):

* Coverage End:

For assistance, please call the Service Center at (866) 663-4735.

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Premium History Report:

PREMIUM HISTORY REPORT																
RUN DATE: 07/12/2010 PAGE: 1																
FLAIR ORG		FLAIR ACCT CODE				AGENCY SUB GROUP										
72010101700		722020210277201010000001000000				0001 -										
EMP ID	FIRST NAME	MI	LAST NAME	PAY PLAN	CLASS CODE	FTE	PLAN TYPE	BENEFIT PLAN	COVERAGE LEVEL	COVERAGE PERIOD	WARRANT DATE	PAYMENT SOURCE	TRANS DATE	EMPLOYEE PAID	EMPLOYER PAID	
				09	SMS	9606	1.00	BASIC LIFE	BASIC LIFE MINNESOTA	INDIVIDUAL	02/01/2010	01/15/2010	PAYROLL DEDUCTION	01/12/2010	\$0.00	\$18.91
											01/29/2010	01/29/2010	PAYROLL DEDUCTION	01/26/2010	\$0.00	\$18.91
														TOTAL	\$0.00	\$37.82
								DENTAL	COMPBENEFITS SCHEDULE B #4054	EMPLOYEE ONLY	02/01/2010	01/15/2010	PAYROLL DEDUCTION	01/12/2010	\$7.37	\$0.00
											01/29/2010	01/29/2010	PAYROLL DEDUCTION	01/26/2010	\$7.37	\$0.00
														TOTAL	\$14.74	\$0.00
								HEALTH	STATE PPO PLAN	INDIVIDUAL	02/01/2010	01/29/2010	PAYROLL DEDUCTION	01/26/2010	\$0.00	\$249.34
											01/15/2010	01/15/2010	PAYROLL DEDUCTION	01/12/2010	\$0.00	\$249.34
														TOTAL	\$0.00	\$498.68
				01	CAREER SERVICE	1334	1.00	BASIC LIFE	BASIC LIFE MINNESOTA	INDIVIDUAL	02/01/2010	01/15/2010	PAYROLL DEDUCTION	01/12/2010	\$1.09	\$3.64
											01/29/2010	01/29/2010	PAYROLL DEDUCTION	01/26/2010	\$1.09	\$3.64
														TOTAL	\$2.18	\$7.28
								DENTAL	COMPBENEFITS NETWORK PLUS#4004	EMPLOYEE ONLY	02/01/2010	01/15/2010	PAYROLL DEDUCTION	01/12/2010	\$8.11	\$0.00
											01/29/2010	01/29/2010	PAYROLL DEDUCTION	01/26/2010	\$8.11	\$0.00
														TOTAL	\$16.22	\$0.00
								HEALTH	CAPITAL HEALTH PLAN HMO	INDIVIDUAL	02/01/2010	01/29/2010	PAYROLL DEDUCTION	01/26/2010	\$25.00	\$224.34
											01/15/2010	01/15/2010	PAYROLL DEDUCTION	01/12/2010	\$25.00	\$224.34
														TOTAL	\$50.00	\$448.68

Budget Reports



Budgeted Positions Reports

Overview

Access the Budgeted Positions Report in the Data Warehouse Reports module of the People First System. The report has seven different report modes to display position data. You can obtain a listing of budgeted positions for analysis and monitoring purposes. OPS positions are excluded from this report. The Data Warehouse provides the data in this report, which is as of the previous day.

Definitions

All seven reports include the following fields:

- Org Code – Org Code from the employee's position for the selected record
- Budget Entity – Budget entity code for the selected position record
- Pos Num – Position number for the selected record
- Last Name – Employee's last name. If the position is vacant, the word **"**Vacant/Date Vacant**"** will be displayed in this column. Example: ****VACANT 05/11/10****.
- First Name – Employee's first name
- MI – Employee's middle initial
- Emp ID – Employee's People First employee ID (PERNK)
- FLAIR Org – FLAIR Org from the employee's position record for the selected record
- Class Code – Class code for the selected position record
- Class Title – Class title for the selected position record
- Pay Plan – Pay Plan (employee subgroup) for the selected position record
- Pay Grade – Pay grade for the selected position record
- Base Pay – Employee's base rate of pay (excluding additives)
- CO – Physical county code for the selected position record
- Appt Status – Appointment status for the employee
- Ret Code – Retirement code for the employee
- Pos FTE – Full-time Equivalent from the employee's Pay Information record
- Broadband – Broadband code for the selected position record
- Pay Band – Pay band code for the selected position record
- OCA – Other Cost Accumulator (OCA) code from the selected position record. This is used by Department of Health, Department of Children and Families and Agency for Persons with Disabilities only.

Budgeted Positions Reports

The Budgeted Positions by Org Report includes the following additional fields:

- EEO4 – EEO4 code for the employee’s record
- Gender – Employee’s gender
- Race – Employee’s race code

Filters

The report includes the following filters:

- OLO Code – Required filter; defaults to your agency’s OLO code.
- Org Code (from – to) – Optional filter; defaults to “Select Organization” (no org code selected) and a drop down of available filters is provided. To process the report for one org code, enter the org code in the “from” org code field. To process the report for a range of org codes, enter an org code in both the “from” and “to” org code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- FLAIR Org Code (from – to) – Optional filter; defaults to ‘Select FLAIR Org’ (no FLAIR org selected) and a drop down of available filters is provided. To process the report for one FLAIR org, enter the FLAIR org in the “from” FLAIR org field. To process the report for a range of FLAIR org codes, enter an FLAIR org in both the “from” and “to” FLAIR org fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Budget Entity (from – to) – Optional filter; defaults to ‘Select Budget Entity’ (no budget entity selected) and provides a drop down of available filters. To process the report for one budget entity code, enter the budget entity code in the “from” budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the “from” and “to” budget entity fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Class Code (from – to) – Optional filter; defaults to ‘Select Class Code’ (no class code selected) and a drop down of available filters is provided. To process the report for one class code, enter the class code in the “from” class code field. To process the report for a range of class codes, enter a class code in both the “from” and “to” class code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- County (from – to) – Optional filter; defaults to ‘Select County’ (no county selected) and a drop down of available filters is provided. To process the report for one county enter the county in the “from” county field. To process the report for a range of county codes, enter a county in both the “from” and “to” county code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Report Mode – Required filter. You must select one report mode from the drop down box. The seven different report modes provide users with choices for the presentation of data in their report. Available report modes are:
 - Budgeted Positions Status – The report is sorted by position number.

Budgeted Positions Reports

- Budgeted Positions by Org – The report is sorted by Org Code, then by position number.
- Budgeted Positions by FLAIR Org – The report will be sorted by FLAIR Org, then by position number.
- Budgeted Positions by Class – The report will be sorted by class code, then by position number.
- Budgeted Positions by Class and Division – The report will be sorted by Org Level 1 Name, then by class code and position number.
- Budgeted Positions within Division – The report will be sorted by Org Level 1 Name, then by position number.
- Budgeted Positions by County – The report will be sorted by county, then position number.
- Report Format – Required filter; defaults to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Sort Hierarchy

The sort sequence is determined by the report mode selected. See report mode above for each sort sequence.

Totals

The report mode selected determines how totals are presented in the report.

The following totals are provided for each report mode:

- Budgeted Positions Status – The end of the report lists totals for the number of positions, established FTE, vacancies and total employees.
- Budgeted Positions by Org –The end of each org code and report lists totals for the number of positions, established FTE, vacancies and total employees.
- Budgeted Positions by FLAIR Org – The end of each FLAIR code and report lists totals for the number of positions, established FTE, vacancies and total employees.
- Budgeted Positions by Class – The end of each class title and report lists totals for the number of positions, established FTE, vacancies and total employees.
- Budgeted Positions by Class and Division – The end of each class code, Org Level 1 Name and report lists totals for the number of positions, established FTE, vacancies and total employees.
- Budgeted Positions within Division – The end of each Org Level 1 Name and report lists totals for the number of positions, established FTE, vacancies and total employees.
- Budgeted Positions by County – The end of each county and report lists totals for the number of positions, established FTE, vacancies and total employees.

Budgeted Positions Reports

Authorization

Users with a security role code of A, C, D, F, G, H, I, K, M, N, S, T, U, X and Y will be able to process the report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Budget Reports

Step 2: Select the Budgeted Positions Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window remains blank until the report results display. The results may take a while to display depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report displays if there is no data available for the selected report criteria.

For Excel, the report selection criteria remain on the screen until the report results display. The results may take a while to display depending on the report and the selected filters. Click the "Download to Excel" link to export to Excel once the results are displayed. While the PDF reports are formatted for printing, the Excel reports are unformatted so the user can work with the data as needed. If there is no data available for the selected report criteria, you will see a message indicating "No records found for selection. Please verify selection criteria."

If you do not enter a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: "Errors have occurred" and a red X is displayed next to the filter that needs to be corrected. Correct the filters and select the Run Report button.

Report Selection Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

The screenshot shows the 'Report Selection Criteria' screen for the 'Budgeted Positions Report'. The page header includes the 'PeopleFirst STATE OF FLORIDA HR' logo and a breadcrumb trail 'Home > Report Selection Criteria'. Below the header, there is a title 'Report Selection Criteria' and a subtitle 'Select or enter values for report parameters.' The main content area contains several filter fields:

- Report Title: Budgeted Positions Report
- * OLO Code: 7200
- Org Code (from): - Select Organization -
- FLAIR Org (from): - Select FLAIR Org -
- Budget Entity (from): - Select Budget Entity -
- Class Code (from): - Select Class -
- County (from): - Select County -
- * Report Mode: Budgeted Positions Status
- * Report Format: PDF
- Org Code (to): - Select Organization -
- FLAIR Org (to): - Select FLAIR Org -
- Budget Entity (to): - Select Budget Entity -
- Class Code (to): - Select Class -
- County (to): - Select County -

A 'Run Report' button is located at the bottom center of the form.

Budgeted Positions Reports

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Budgeted Positions Status Report:

BUDGETED POSITIONS STATUS REPORT																People First STATE OF FLORIDA HR			
DEPARTMENT OF MANAGEMENT SERVICES																			
RUN DATE: 06/23/2010																			
PAGE: 1																			
ORG CODE	BUDGET ENTITY	POS NUM	LAST NAME	FIRST NAME	M	EMP ID	FLAIR ORG	CLASS CODE	CLASS TITLE	PAY PLAN	PAY GRADE	BASE PAY	CO	APPT STATUS	RET CODE	POS FTE	BROADBAND	PAY BAND	OCA
72600501000000000000000000	72600500	003260	** VACANT 02/19/10 **				72600501001	6705	EXEC DIR - OFFICE OF SUPPLIER DIVERSITY	09	930	\$2,085.73	037		HM	1.00	10-1011-01		023
72600501000000000000000000	72600500	003262	** VACANT 06/17/10 **				72600501001	2053	DISTRIBUTED COMPUTER SYSTEMS ADMIN - SES	08	425	\$1,673.36	037		HA	1.00	11-3021-02		020
72600501000000000000000000	72600500	003264	TAURASI	MANDY	R	687507	72600501001	3344	LABOR, EMPLOYMENT & TRAIN ADMIN I - SES	08	424	\$2,000.00	037	Exempt	HA	1.00	11-9199-02		020
72600501000000000000000000	72600500	003264	WILLIAMS	ROCKY	G	222801	72600501001	3344	LABOR, EMPLOYMENT & TRAIN ADMIN I - SES	08	424	\$1,534.62	037	Exempt	QA	1.00	11-9199-02		020
72600501000000000000000000	72600500	003265	MENZEL	ARIEL	B	930027	72600501001	2234	OPERATIONS & MGMT CONSULTANT I - SES	08	421	\$1,750.52	037	Exempt	HA	1.00	13-1111-03		007
72600501000000000000000000	72600500	003266	BROCK	TYLER	F	202290	72600501001	2224	SENIOR MANAGEMENT ANALYST I - SES	08	422	\$1,474.15	037	Exempt	HA	1.00	13-1111-03		007
72600501000000000000000000	72600500	003267	SNOVER	LINDGAY	C	930028	72600501001	2209	MANAGEMENT ANALYST I - SES	08	417	\$3,725.26	037	Exempt	HA	1.00	13-1111-02		006
72600501000000000000000000	72600500	003268	GERVAIS	STEPHANIE	F	153800	72600501001	2234	OPERATIONS & MGMT CONSULTANT I - SES	08	421	\$1,516.63	037	Exempt	HA	1.00	13-1111-03		007
72600501000000000000000000	72600500	003270	TAMAYO	TAMARA	H	601824	72600501001	2238	OPERATIONS & MGMT CONSULTANT MGR - SES	08	425	\$1,673.36	037	Exempt	HA	1.00	11-1021-02		020
72600501000000000000000000	72600500	003272	OMEL	JEFFERY	A	930026	72600501001	2234	GOVERNMENT OPERATIONS CONSULTANT I	01	021	\$2,000.00	037	Probationary	HA	1.00	13-1111-03		007
72600501000000000000000000	72600500	003273	ASSAROUPE	MELISSA	D	213716	72600501001	0812	PURCHASING AGENT II - SES	08	415	\$1,268.97	037	Exempt	HA	1.00	13-1023-01		003
72600501000000000000000000	72600500	003275	ROGSMAN	LORI	E	165518	72600501001	0709	ADMINISTRATIVE ASSISTANT I - SES	08	415	\$1,264.03	037	Exempt	HA	1.00	43-6011-02		003
72600501000000000000000000	72600500	007878	JACKSON	LAUREN	R	115426	72600501001	0102	SECRETARY	01	007	\$1,000.00	037	Probationary	HA	1.00	43-5014-01		001
72600501000000000000000000	72600500	901216	SOUTHERLAND	KELVIN	B	929273	72600501001	2234	OPERATIONS & MGMT CONSULTANT I - SES	08	421	\$3,361.00	037	Probationary		1.00	13-1111-03		007
AGENCY TOTALS:																			
POSITIONS:		13.00																	
ESTABLISHED FTE:		13.00																	
VACANCIES:		2.00																	
TOTAL EMPLOYEES:		12																	
THIS REPORT MAY CONTAIN INFORMATION THAT IS CONFIDENTIAL UNDER STATE OR FEDERAL LAW. IMPROPER ACCESS OR RELEASE OF SUCH INFORMATION MAY BE A VIOLATION OF THESE LAWS.																			

LAS/PBS Budget Report

Overview

Access the LAS/PBS Budget Report in the Data Warehouse Reports module of the People First System. The report has three different report modes to use to display position and rate information. Using it ensures accurate data is sent on the Legislative Appropriations System/Planning and Budgeting Subsystem (LAS/PBS) file each week, month and at fiscal year end. The Data Warehouse provides the data in this report, as of the previous day.

Definitions

All three reports include the following fields:

- BE – Budget entity code for the selected position record
- OV/SH – Overlap (O) or shared indicator (S) for the selected position record
- POS NUM – Position number for the selected record
- PAY PLAN – Pay plan (employee subgroup) for the selected position record
- CLASS CODE – Class code for the selected position record
- CLASS TITLE – Class title for the selected position record. When the position is vacant or overlapped, a label of *****Overlapped Position***** or ****Vacant Position**** displays in this column.
- POS FTE – Full time equivalent (FTE) for the selected position record
- PAY GRADE – Pay grade for the selected position record
- CO – Physical county code for the selected position record
- OCA – Other cost accumulator (OCA) for the selected position record. Only the Department of Health, Department of Children and Families and Agency for Persons with Disabilities use this field.
- CBU – Collective bargaining unit code for the selected position record
- EMP FTE – Full time equivalent (FTE) from the employee's Pay Information record
- RET CD – Retirement code for the employee; defaults to HA for vacant positions
- BASE RATE – Annual base rate (base rate of pay *26.1 for biweekly agencies or base rate of pay *12 for monthly agencies) without pay additives rounded to the nearest whole dollar
- PAY ADD – Annual amount of pay additive (additive amount *26.1 for biweekly agencies or additive amount *12 for monthly agencies) rounded to the nearest whole dollar
- PAY RATE – Annual rate (base rate of pay plus additives *26.1 for biweekly agencies or base rate of pay plus additives *12 for monthly agencies) rounded to the nearest whole dollar
- RET AMT – Annual employer retirement contribution amount rounded to the nearest whole dollar

LAS/PBS Budget Report

- FICA AMT – Annual employer FICA contribution amount rounded to the nearest whole dollar
- HLTH AMT – Annual employer health insurance contribution amount rounded to the nearest whole dollar
- LIFE AMT – Annual employer life insurance contribution amount rounded to the nearest whole dollar
- DIS AMT – Annual employer disability insurance contribution amount rounded to the nearest whole dollar

Filters

The report includes the following filters:

- OLO Code – Required filter; defaults to your agency's OLO code.
- Org Code (from – to) – Optional filter; defaults to "Select Organization" (no org code selected) and a drop down of available filter. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- FLAIR Org (from – to) – Optional filter; defaults to 'Select FLAIR Org' (no FLAIR org selected) and provides a drop down of available filters. To process the report for one FLAIR org, enter the FLAIR org in the "from" FLAIR org field. To process the report for a range of FLAIR org codes, enter an FLAIR org in both the "from" and "to" FLAIR org fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Budget Entity (from – to) – Optional filter; defaults to 'Select Budget Entity' (no budget entity selected) and provides a drop down of available filters. To process the report for one budget entity code, enter the budget entity code in the "from" budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the "from" and "to" budget entity fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- SPC (from – to) – Optional filter; defaults to "Select SPC" (no state program component selected) and provides a drop down of available filters. To process the report for one SPC code, enter the SPC code in the "from" SPC field. To process the report for a range of SPC codes, enter a SPC code in both the "from" and "to" SPC fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Report Mode – Required filter. You must select one report mode from the drop down box. The three different report modes provide users with choices for the presentation of data in their report. Available report modes are:
 - Rate Report – sorted by budget entity, FLAIR org then by position number

LAS/PBS Budget Report

- Budget Report – sorted by budget entity, SPC code, org code then by position number
- Detail Report – sorted by budget entity, SPC code then by position number
- Report Format – Required filter; defaults to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Sort Hierarchy

The sort sequence is determined by the report mode selected. See report mode above for each sort sequence.

Totals

The report mode selected determines how the totals are presented in the report. The following totals are provided for each report mode.

- Rate Report – Totals are provided at the end of each budget entity, FLAIR Org Level 2 and report for the position FTE, employee FTE, overlap FTE, established FTE, vacant FTE, base rate, CAD additive, leadworker additive, shift additive, legislatively approved additive, trainer additive, critical market additive, hazardous additive, coordinator, temp special duty additive, other (additives), rate of pay, benefit costs, retirement, FICA, health, life, disability, annualized vacant rate and annualized salaries.
- Budget Report – Totals are provided at the end of each budget entity, SPC code, org code and report for the position FTE, employee FTE, overlap FTE, established FTE, vacant FTE, base rate, CAD additive, leadworker additive, shift additive, legislatively approved additive, trainer additive, critical market additive, hazardous additive, coordinator, temp special duty additive, other (additives), rate of pay, benefit costs, retirement, FICA, health, life, disability, annualized vacant rate and annualized salaries.
- Detail Report – Totals are provided at the end of each budget entity, SPC code and report for the position FTE, employee FTE, overlap FTE, established FTE, vacant FTE, base rate, CAD additive, leadworker additive, shift additive, legislatively approved additive, trainer additive, critical market additive, hazardous additive, coordinator, temp special duty additive, other (additives), rate of pay, benefit costs, retirement, FICA, health, life, disability, annualized vacant rate and annualized salaries.

Special Note

If you see missing or invalid data on this report, it could indicate that data stored on the position record is inaccurate or incorrect in People First. Please research the position data and make the appropriate corrections.

Authorization

Users with a security role code of A, C, D, F, G, H, I, K, M, N, S, U, X and Y will be able to process the report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Budget Reports

LAS/PBS Budget Report

Step 2: Select the LAS/PBS Budget Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window remains blank until the report results display. The results may take a while to display depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report displays if there is no data available for the selected report criteria.

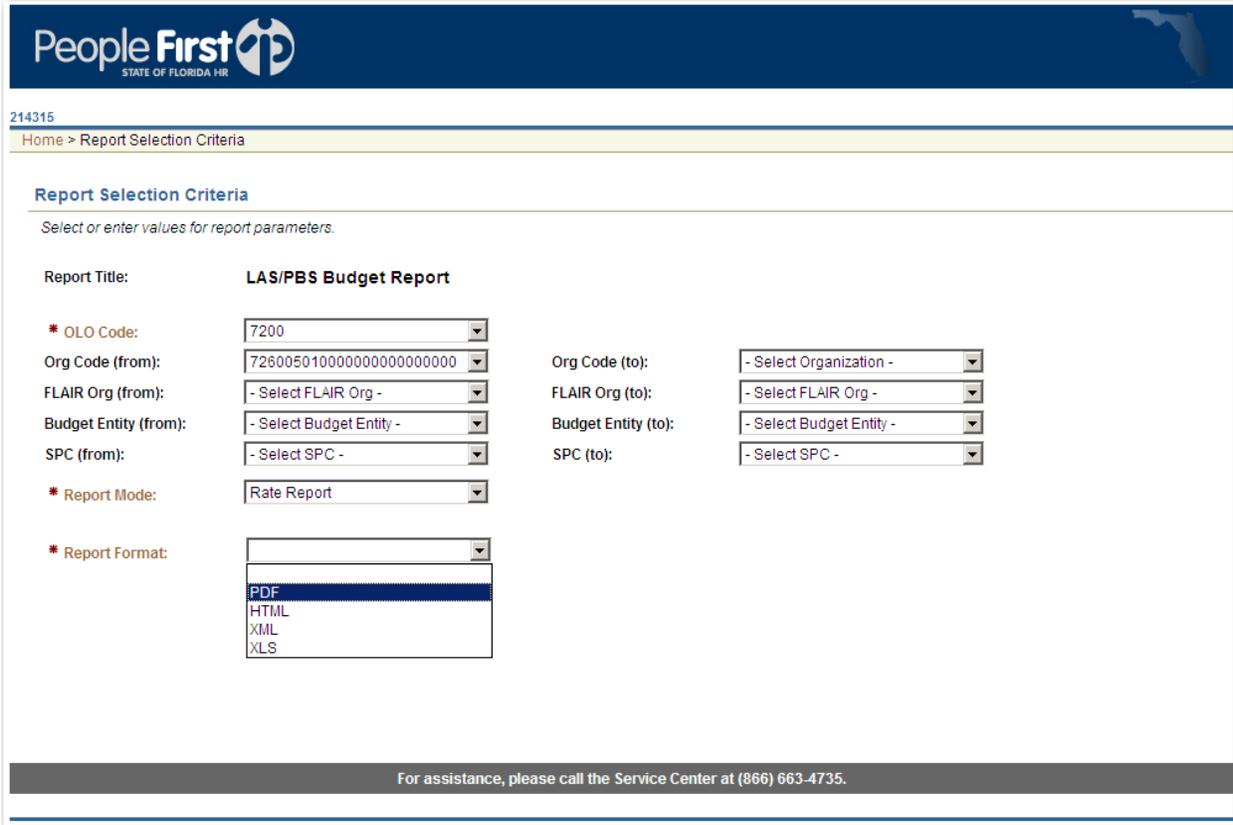
For Excel, the report selection criteria remain on the screen until the report results display. The results may take a while to display depending on the report and the selected filters. Click the "Download to Excel" link to export to Excel when the results display. While the PDF reports are formatted for printing, the Excel reports are unformatted so the user can work with the data as needed. If there is no data available for the selected report criteria, you will see a message indicating "No records found for selection. Please verify selection criteria."

If you do not enter a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: "Errors have occurred" and a red X is displayed next to the filter that needs to be corrected. Correct the filters and select the Run Report button.

LAS/PBS Budget Report

Report Selection

Criteria Sample Below is a sample of the report selection criteria screen and the available filters:



214315

Home > Report Selection Criteria

Report Selection Criteria

Select or enter values for report parameters.

Report Title: **LAS/PBS Budget Report**

* OLO Code: 7200

Org Code (from): 726005010000000000000000

Org Code (to): - Select Organization -

FLAIR Org (from): - Select FLAIR Org -

FLAIR Org (to): - Select FLAIR Org -

Budget Entity (from): - Select Budget Entity -

Budget Entity (to): - Select Budget Entity -

SPC (from): - Select SPC -

SPC (to): - Select SPC -

* Report Mode: Rate Report

* Report Format:

- PDF
- HTML
- XML
- XLS

For assistance, please call the Service Center at (866) 663-4735.

LAS/PBS Budget Report

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the LAS/PBS Budget Report:

DETAIL LAS/PBS - DETAIL REPORT DEPARTMENT OF MANAGEMENT SERVICES



RUN DATE: 07/29/2010
PAGE: 2

BUDGET ENTITY: 72010100 EXECUTIVE DIR/SUPPORT SVCS
SPC: 1602000000 EXEC LEADERSHIP/SUPPRT SVC

OV/ SH	POS NUM	PAY PLAN	CLASS CODE	CLASS TITLE	POS FTE	PAY GRADE	CO	OCA	CBU	EMP FTE	RET CD	BASE RATE	PAY ADD	PAY RATE	RET AMT	FICA AMT	HLTH AMT	LIFE AMT	DIS AMT
	000001	08	5864	** VACANT POSITION **	1.00	415	037		89	0.00	HA	\$25,577	\$0	\$25,577	\$2,519	\$1,957	\$10,247	\$0	\$10
	000005	08	0720	EXECUTIVE ASSISTANT II - SES	1.00	426	037		89	1.00	HA	\$51,698	\$0	\$51,698	\$5,092	\$3,955	\$14,210	\$195	\$21
	000009	08	2225	SENIOR MANAGEMENT ANALYST II	1.00	426	037		89	1.00	HA	\$58,837	\$0	\$58,837	\$5,795	\$4,501	\$6,283	\$222	\$24
	000010	08	0709	ADMINISTRATIVE ASSISTANT I -	1.00	415	037		89	1.00	HA	\$36,073	\$0	\$36,073	\$3,553	\$2,760	\$14,210	\$136	\$14
	000012	01	0830	** VACANT POSITION **	1.00	023	037		01	0.00	HA	\$38,809	\$0	\$38,809	\$3,823	\$2,969	\$8,867	\$0	\$0
	000013	08	2225	SENIOR MANAGEMENT ANALYST II	1.00	426	037		89	1.00	HA	\$51,196	\$0	\$51,196	\$5,043	\$3,916	\$6,283	\$193	\$20
	000016	08	2236	OPERATIONS & MGMT CONSULTANT	1.00	423	037		89	1.00	HA	\$59,227	\$0	\$59,227	\$5,834	\$4,531	\$6,283	\$223	\$24
	000017	08	9737	CHIEF OF FINANCIAL MGMT SERV	1.00	530	037		89	1.00	HA	\$84,743	\$0	\$84,743	\$8,347	\$6,483	\$6,283	\$319	\$34
	000018	08	2209	MANAGEMENT ANALYST I - SES	1.00	417	037		86	1.00	HA	\$36,733	\$0	\$36,733	\$3,618	\$2,810	\$14,210	\$138	\$15
	000025	08	7736	ATTORNEY	1.00	220	037		81	1.00	HA	\$44,169	\$0	\$44,169	\$4,351	\$3,378	\$6,283	\$166	\$18
	000031	01	0045	** VACANT POSITION **	1.00	013	037		01	0.00	HA	\$23,573	\$0	\$23,573	\$2,322	\$1,804	\$8,867	\$0	\$0
	000042	08	3718	GRAPHICS MANAGER - SES	1.00	418	037		89	1.00	HA	\$39,001	\$0	\$39,001	\$3,842	\$2,984	\$10,247	\$147	\$16
	000419	09	9512	LEGISLATIVE AFFAIRS DIRECTOR	1.00	920	037		99	1.00	PM	\$65,250	\$0	\$65,250	\$8,561	\$4,992	\$5,863	\$246	\$26
	000455	08	2225	SENIOR MANAGEMENT ANALYST II	1.00	426	037		89	1.00	HA	\$61,179	\$0	\$61,179	\$6,026	\$4,680	\$14,210	\$231	\$24
	000459	01	1430	ACCOUNTANT II	1.00	016	037		05	1.00	HA	\$27,407	\$0	\$27,407	\$2,700	\$2,096	\$7,105	\$60	\$0
	000467	01	1467	PROFESSIONAL ACCOUNTANT	1.00	020	037		05	1.00	HA	\$36,698	\$0	\$36,698	\$3,615	\$2,807	\$12,050	\$80	\$0
	000579	08	2133	DATA PROCESSING MANAGER - S	1.00	426	037		89	1.00	HA	\$73,281	\$0	\$73,281	\$7,218	\$5,606	\$14,210	\$276	\$29
	000726	08	2225	SENIOR MANAGEMENT ANALYST II	1.00	426	037		89	1.00	DP	\$78,803	\$0	\$78,803	\$8,597	\$6,029	\$14,210	\$297	\$32
	000728	01	1427	ACCOUNTANT I	1.00	014	037		05	1.00	DP	\$25,578	\$0	\$25,578	\$2,791	\$1,957	\$5,683	\$56	\$0
	000735	08	2240	INSPECTOR SPECIALIST - SES	1.00	424	037		89	1.00	HA	\$51,052	\$0	\$51,052	\$5,029	\$3,905	\$14,210	\$192	\$20
	000781	01	0945	** VACANT POSITION **	1.00	017	037		05	0.00	HA	\$28,033	\$0	\$28,033	\$2,761	\$2,144	\$8,867	\$0	\$0
	000898	08	7738	SENIOR ATTORNEY	1.00	230	037		89	1.00	PA	\$79,615	\$0	\$79,615	\$7,842	\$6,090	\$14,210	\$300	\$32
	000930	09	9571	INSPECTOR GENERAL-DMS	1.00	930	037		99	1.00	HM	\$99,029	\$0	\$99,029	\$12,993	\$7,576	\$14,210	\$373	\$40
	000931	08	1665	AUDIT DIRECTOR - SES	1.00	426	037		89	1.00	HA	\$82,874	\$0	\$82,874	\$8,163	\$6,340	\$6,283	\$312	\$33
	001004	08	1445	ACCOUNTING SERVICES SUPERVIS	1.00	422	037		87	1.00	DP	\$44,438	\$0	\$44,438	\$4,848	\$3,399	\$14,210	\$167	\$18
	001258	09	8970	GENERAL COUNSEL-DMS	1.00	930	037		99	1.00	PM	\$112,431	\$0	\$112,431	\$14,751	\$8,251	\$14,210	\$424	\$45
O	001258	09	8970	*** OVERLAPPED POSITION ***	0.00	930	037		99	1.00	HM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	001376	08	0709	ADMINISTRATIVE ASSISTANT I -	1.00	415	037		89	1.00	HA	\$26,780	\$0	\$26,780	\$2,638	\$2,048	\$6,283	\$101	\$11

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Human Resource Administration Reports



Turnover Report

Overview

Access the Turnover Report in the Data Warehouse Reports Module of the People First system. It consists of two parts, Turnover and a Summary by Separation Reason Code/Class Code. You can obtain turnover data from January 1, 2007, to the prior month. As an example, if you need turnover data for fiscal year 2009-2010, you will need to run the report on or after July 1, 2010, and it will contain data from July 2009 through June 2010. For turnover data prior to January 1, 2007, please contact the Data Warehouse Team at PeopleFirstDataWarehouse@dms.myflorida.com.

The Data Warehouse provides the separation data contained in this report as of the previous day. This report contains the beginning and ending period data pulled from the monthly history files. These monthly history files update on the first day of each month and contain data as of the last day of the prior month.

Definitions

The report includes the following fields:

- Class Code – Pulled from the monthly history file for the position.
- Class Title – Pulled based on the class code from the position using the current class code. *Note:* If the class title has changed since January 1, 2007, it will reflect the current class title as stored in the broadband crosswalk.
- Beginning Period – Number of Positions – The total number of position full-time equivalent (FTE) values for the beginning date and class code, pulled from the monthly history file based on the begin date entered.
- Beginning Period – Number of Vacant Positions – Total vacant positions for the beginning date and class code, pulled from the monthly history file, based on the begin date entered.
- Beginning Period – Percentage of Vacant Positions – Number of vacant positions divided by the number of positions and multiplied by 100, pulled from the monthly history file, based on the begin date entered.
- Ending Period – Number of Positions – The total number of position FTEs for the ending date and class code, pulled from the monthly history file, based on the end date entered.
- Ending Period – Number of Vacant Positions – Total vacant positions for the ending date and class code, pulled from the monthly history file, based on the end date entered.
- Ending Period – Percentage of Vacant Positions – Number of vacant positions divided by the number of positions and multiplied by 100, pulled from the monthly history file, based on the end date entered.
- Average Number of Positions – Beginning number of positions plus the ending number of positions divided by two.

Turnover Report

- Number of Separations – Total separations for the given dates, pulled from the employee transaction view, based on the dates selected. If this report is run for dates between 1/1/2007 and 7/31/2010, interagency transfers where the exiting agency did not process a separation PAR will not be included.
- Turnover Percentage – The number of separations divided by the average number of positions, multiplied by 100. This number is specific to the window established by the report begin and end dates.

The Summary by Separation Reason Code/Class Code includes the following fields:

- Class Code – Pulled from the monthly history file for the position.
- Move to Private Sector (51) – The number of separations for the class code and separation reason code 51.
- Move within State of FL Gov (52) – The number of separations for the class code and separation reason code 52.
- Termination Initiated – Employee (53) – The number of separations for the class code and separation reason code 53.
- Failed Probationary Period (55) – The number of separations for the class code and separation reason code 55.
- Retirement (56) – The number of separations for the class code and separation reason code 56.
- Layoff (57) – The number of separations for the class code and separation reason code 57.
- End of Appointment Period (58) – The number of separations for the class code and separation reason code 58.
- Dismissal (59) – The number of separations for the class code and separation reason code 59.
- Death of the Employee (60) – The number of separations for the class code and separation reason code 60.
- Death of Employee in Line of Duty (61) – The number of separations for the class code and separation reason code 61.
- Abandonment (62) – The number of separations for the class code and separation reason code 62.
- Move to Non State of FL Gov (63) – The number of separations for the class code and separation reason code 63.

Filters

The report uses the following filters:

- OLO Code – Required filter; defaults to your agency's OLO.
- Org Code (from – to) – Optional filter; defaults to "Select Organization" (no org code selected) and provides a drop down of available filters. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the

Turnover Report

“from” and “to” org code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.

- Pay Plan – Optional filter; defaults to “Select Pay Plan” (no pay plan selected) and provides a drop down box of available filters. If you do not enter a pay plan, the system provides all pay plans. To select multiple pay plan codes, hold the Control (CTRL) key and click to select the various pay plan codes. Use the same process of pressing and holding the CTRL key to deselect pay plan codes.
- Class Code – Optional filter; defaults to “Select Class Code” (no class code selected). You may select up to 10 distinct class codes. If you select a specific pay plan, the system will only provide class codes within that selected pay plan. To select multiple class codes, hold the Control CTRL key and click to select the various class codes. Use the same process of pressing and holding the CTRL key to deselect class codes.
- CBU – Optional filter; defaults to “Select CBU” (no CBU selected). You may select up to 20 distinct CBU codes. If left blank, the system provides all CBU codes. To select multiple CBU codes, hold the Control CTRL key and click to select the various CBU codes. Use the same process of pressing and holding the CTRL key to deselect CBU codes.
- County – Optional filter; defaults to “Select County” (no county selected). You may select up to 10 distinct counties from a drop down menu. If left blank, the system provides all counties. *Note:* This is based on Headquarters County for the position. To select multiple county codes, hold the Control CTRL key and click to select the various county codes. Use the same process of pressing and holding the CTRL key to deselect county codes.
- Begin Date – Required filter; the beginning date (MM/DD/YYYY) for the report request. This must be the first day of the month. Failure to enter the first day of the month will result in invalid data (zeroes) in the beginning period information. The earliest allowable date is January 1, 2007.
- End Date – Required filter; the ending date (MM/DD/YYYY) for the report request. This must be the last day of the month. Failure to enter the last day of the month will result in invalid data (zeroes) in the ending period information. *Note:* You cannot produce a turnover report for the current month since the monthly history file is produced the first day of the following month. For example, turnover data for the month of July 2010 is not available until August 1, 2010.
- Reason Code – You may select up to 12 separation reason codes. However, if no separation reason code is selected, the report will only provide data for separation reason codes 51, 53 and 62. Use the directional keys to add or remove separation reason codes in your filter.
- Report Format – Required filter; defaults to PDF. To export to Excel, select XLS. PDF reports results download faster than XLS and are in a printer friendly format.

Turnover Report

Sort Hierarchy

The report uses the following sort sequence:

Turnover:

- Class Code
- Class Title

Summary by Separation Reason Code/Class Code:

- Class Code

Totals

The report includes the following totals:

Summary by Separation Reason Code/Class Code

- Class Totals – The total number of separations by class

Special Notes

The following special notes apply to the report:

- The report does not include OPS positions.
- You cannot produce a turnover report for the current month since the monthly history file is not produced until the first day of the following month.
- The earliest date you can enter is January 1, 2007.
- If this report is run for dates between 1/1/2007 and 7/31/2010, interagency transfers where the exiting agency did not process a separation PAR will not be included.
- The abolishment of positions or agency divestitures will result in a percentage greater than 100 percent.
- When submitting turnover information for competitive pay purposes only use separation codes 51, 53 and 62.

Authorization

Users with a security role code of A, B, C, D, F, G, H, I, K, M, N, R, S, T, U, X and Y will be able to process the report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; HR Reports

Step 2: Select the Turnover Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window is blank until the report results are returned. The results may take a while to return depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report is returned if there is no data available for the selected report criteria.

Turnover Report

For Excel, the report selection criteria screen remains on the screen until the report results are returned. The results may take a while to return depending on the report and the selected filters. Click the “Download to Excel” link to export to Excel once the results are returned. While the PDF reports are formatted for printing, the Excel reports are unformatted so you can work with the data as needed. If there is no data available for the selected report criteria, you will see a message indicating, “No records found for selection. Please verify selection criteria.”

If you do not enter a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: “Errors have occurred.” A red X is displayed next to the filter that needs to be corrected. Correct the filters and select the Run Report button.

Report Selection Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

The screenshot shows the 'Report Selection Criteria' interface for a 'Turnover Report'. The header includes the 'People First STATE OF FLORIDA HR' logo and a navigation breadcrumb 'Home > Report Selection Criteria'. Below the header, there is a sub-header 'Report Selection Criteria' and a prompt 'Select or enter values for report parameters.' The form contains several fields:

- Report Title:** Turnover Report
- * OLO Code:** 7200
- Org Code (from):** - Select Organization -
- Org Code (to):** - Select Organization -
- Pay Plan:** - Select Pay Plan - (List: 01, 07, 08, 09)
- Class Code:** - Select Class Code - (List: 0001, 0004, 0008, 0045)
- CBU:** - Select CBU - (List: 00, 01, 02, 03)
- County:** - Select County - (List: 001 - Alachua, 002 - Baker, 003 - Bay, 004 - Bradford, 005 - Brevard, 006 - Broward, 007 - Calhoun, 008 - Charlotte, 009 - Citrus)
- * Begin Date:** 07/01/2009
- * End Date:** 06/30/2010
- Reason Code:** A list of codes (51-60) is shown on the left, and a large empty box on the right is used for selecting or moving items.
- * Report Format:** PDF

A 'Run Report' button is located at the bottom center of the form. At the very bottom of the page, a footer message reads: 'For assistance, please call the Service Center at (866) 663-4735.'

Turnover Report

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Turnover Report:

Turnover

TURNOVER REPORT
DEPARTMENT OF MANAGEMENT SERVICES

RUN DATE: 06/02/10
PAGE: 1

People First
STATE OF FLORIDA HR

CLASS CODE	CLASS TITLE	BEGINNING PERIOD: 201001			ENDING PERIOD: 201009			AVERAGE NUMBER OF POSITIONS	NUMBER OF SEPARATIONS	TURNOVER PERCENTAGE
		NUMBER OF POSITIONS	NUMBER OF VACANT POSITIONS	PERCENTAGE OF VACANT POSITIONS	NUMBER OF POSITIONS	NUMBER OF VACANT POSITIONS	PERCENTAGE OF VACANT POSITIONS			
0004	SENIOR CLERK	12	0	0.0%	13	2	15.4%	12.5	1	8.0%
0004	SENIOR CLERK - SES	5	0	0.0%	5	0	0.0%	5	0	0.0%
0008	SENIOR CLERICAL SUPERVISOR - SES	2	0	0.0%	2	0	0.0%	2	0	0.0%
0045	RECORDS TECHNICIAN	2	0	0.0%	2	1	50.0%	2	0	0.0%
0093	SENIOR WORD PROCESSING SYSTEMS OPERATOR	1	0	0.0%	1	0	0.0%	1	0	0.0%
0102	SECRETARY	0	0	0.0%	1	0	0.0%	0.5	0	0.0%
0104	SECRETARY SPECIALIST - SES	1	0	0.0%	1	0	0.0%	1	0	0.0%
0108	ADMINISTRATIVE SECRETARY	1	0	0.0%	1	0	0.0%	1	0	0.0%
0120	STAFF ASSISTANT	12	0	0.0%	14	2	14.3%	13	1	7.7%
0120	STAFF ASSISTANT - SES	5	1	20.0%	4.5	.5	11.1%	4.75	0	0.0%
0130	RECORDS SPECIALIST - SES	1	0	0.0%	1	0	0.0%	1	0	0.0%
0287	CENTREX OPERATOR SUPERVISOR - SES	1	0	0.0%	1	0	0.0%	1	0	0.0%
0444	REGULATORY SPECIALIST III	2	0	0.0%	2	0	0.0%	2	0	0.0%
0670	CHIEF OF PUR COMM-TECHN, OFF&SERVICES-DMS	1	0	0.0%	1	0	0.0%	1	0	0.0%
0675	CHIEF OF PUR COMM-TRANS, FAC & SUPP-DMS	1	0	0.0%	1	0	0.0%	1	0	0.0%
0707	CONTRACTUAL SERVICES SPECIALIST	1	0	0.0%	1	0	0.0%	1	0	0.0%
0709	ADMINISTRATIVE ASSISTANT I	6	0	0.0%	6	0	0.0%	6	0	0.0%
0709	ADMINISTRATIVE ASSISTANT I - SES	16	1	6.3%	16	0	0.0%	16	0	0.0%

IF THIS REPORT IS RUN FOR DATES BETWEEN 1/1/2007 AND 7/31/2010, INTERAGENCY TRANSFERS WHERE THE EXITING AGENCY DID NOT PROCESS A SEPARATION PAR WILL NOT BE INCLUDED. THE ABOLISHMENT OF POSITIONS OR AGENCY DIVESTITURES WILL RESULT IN A PERCENTAGE GREATER THAN 100%. NOTE: WHEN SUBMITTING TURNOVER INFORMATION TO DMS FOR COMPETITIVE PAY PURPOSES ONLY CODES 51, 53 AND 62 SHOULD BE USED.

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Summary by Separation Reason Code/Class Code

TURNOVER REPORT
DEPARTMENT OF MANAGEMENT SERVICES

RUN DATE: 06/02/10
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People First
STATE OF FLORIDA HR

CLASS CODE	MOVE TO PRIVATE SECTOR (51)	MOVE WITHIN STATE OF FL GOV (52)	TERMINATION INITIATED - EMPLOYEE (53)	FAILED PROBATIONARY PERIOD (55)	RETIREMENT (56)	LAYOFF (57)	END OF APPOINTMENT PERIOD (58)	DISMISSAL (59)	DEATH OF EMPLOYEE (60)	DEATH OF EMPLOYEE LINE OF DUTY (61)	ABANDONMENT (62)	MOVE TO NON ST OF FL GOV (63)
0004	0	0	1	0	0	0	0	0	0	0	0	0
0120	0	0	1	0	0	0	0	0	0	0	0	0
0830	0	0	1	0	0	0	0	0	0	0	0	0
0830	0	0	2	0	0	0	0	0	0	0	0	0
0645	0	0	1	0	0	0	0	0	0	0	0	0
1024	0	0	1	0	0	0	0	0	0	0	0	0
1427	1	0	0	0	0	0	0	0	0	0	0	0
2031	1	0	0	0	0	0	0	0	0	0	0	0
2134	0	0	1	0	0	0	0	0	0	0	0	0
2226	0	0	1	0	0	0	0	0	0	0	0	0
2234	0	0	1	0	0	0	0	0	0	0	0	0
2234	0	0	1	0	0	0	0	0	0	0	0	0
6526	0	0	.5	0	0	0	0	0	0	0	0	0
8289	0	0	1	0	0	0	0	0	0	0	0	0
8962	0	0	1	0	0	0	0	0	0	0	0	0
9137	0	0	1	0	0	0	0	0	0	0	0	0
TOTAL	2	0	14.5	0	0	0	0	0	0	0	0	0

IF THIS REPORT IS RUN FOR DATES BETWEEN 1/1/2007 AND 7/31/2010, INTERAGENCY TRANSFERS WHERE THE EXITING AGENCY DID NOT PROCESS A SEPARATION PAR WILL NOT BE INCLUDED. THE ABOLISHMENT OF POSITIONS OR AGENCY DIVESTITURES WILL RESULT IN A PERCENTAGE GREATER THAN 100%. NOTE: WHEN SUBMITTING TURNOVER INFORMATION TO DMS FOR COMPETITIVE PAY PURPOSES ONLY CODES 51, 53 AND 62 SHOULD BE USED.

THIS REPORT MAY CONTAIN INFORMATION THAT IS CONFIDENTIAL UNDER STATE OR FEDERAL LAW. IMPROPER ACCESS OR RELEASE OF SUCH INFORMATION MAY BE A VIOLATION OF THESE LAWS.

Vacancy Report

Overview

Access the Vacancy Report in the Data Warehouse Reports module of the People First system. The report identifies vacant positions within an agency and can be used to identify and monitor vacancies. The report does not provide historical (point-in-time) vacancy data. It displays any position that is vacant as of the previous day. The Data Warehouse provides the data in this report, which is as of the previous day.

Definitions

The report includes the following fields:

- Org Code – Org code from the employee’s position for the selected record
- Org Name – Org name description from the employee’s position for the selected record
- Budget Entity – Budget entity code from the position
- FLAIR Org – FLAIR org from the employee’s position for the selected record
- Pos Num – Position number for the selected record
- Class Code – Class code for the selected position record
- Class Title – Class title for the selected position record
- Pay Plan – Pay plan (employee subgroup) for the selected position record
- Pay Grade – Pay grade code for the selected position record
- CBU – Collective bargaining unit code for the selected record
- Physical County Code – Physical county code for the selected position record
- Physical County Name – Physical county name for the selected position record
- Pos FTE – Full time equivalent (FTE) from the position for the selected record
- Days Vacant – Number of days the position has been vacant
- Vacant Date – Vacancy date is defined as the End Date + one day of when the last “holder” of the applicable position is removed or separated (MM/DD/CCYY format). A vacant date will not be presented on the report for partially filled positions.
- Base Salary – Annual salary without pay additives
- Pay Band – Pay band code for the selected position record (will be blank for non-broadband agencies)
- Pay Band Minimum – Calculated from the minimum of the broadband for the position and multiplied by Vacant FTE * 26 for bi-weekly agencies and * 12 for monthly agencies (will be blank for non-broadband agencies)

Vacancy Report

- Broadband Occupation – Title of the broadband occupation group (will be blank for non-broadband agencies)

Filters

The report uses the following filters:

- OLO – Required filter; defaults to your agency's OLO code.
- Org Code (from – to) – Optional filter; defaults to "Select Organization" (no org code selected) and provides a drop down of available. To process the report for one org code, enter the org code in the "from" org code field. To process the report for a range of org codes, enter an org code in both the "from" and "to" org code fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- FLAIR Org Code (from – to) – Optional filter; defaults to 'Select FLAIR Org' (no FLAIR org selected) and provides a drop down of available filters. To process the report for one FLAIR org, enter the FLAIR org in the "from" FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org in both the "from" and "to" FLAIR org fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Budget Entity (from – to) – Optional filter; defaults to 'Select Budget Entity' (no budget entity selected) and provides a drop down of available filters. To process the report for one budget entity code, enter the budget entity code in the "from" budget entity field. To process the report for a range of budget entity codes, enter a budget entity code in both the "from" and "to" budget entity fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- County (from – to) – Optional filter; defaults to 'Select County' (no county selected) and provides a drop down of available filters. To process the report for one county, enter the county in the "from" county field. To process the report for a range of county codes, enter a county in both the "from" and "to" county code fields. Once you make a selection in the "from" filter, the system removes that value from the "to" filter.
- Employee Type – Required filter; defaults to the "ALL" employee type. May select to just process for Salaried or OPS employees.
- Begin Date – Optional filter. The earliest date the position became vacant. MMDD\CCYY format. This filter will not be available if you choose the "Days Vacant" filter.
- End Date – Optional filter. The latest time frame the position became vacant. MMDD\CCYY format. This filter will not be available when you choose the "Days Vacant" filter.
- Days Vacant – Optional filter. Will default to "Select Days Vacant" (no days selected). Other filter options include "All", 1 – 89 Days, 90 – 179 Days, and 180+ Days. The "Begin Date" and "End Date" filters will not be available when you select this filter.
- Report Format – Required filter; defaults to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are in a printer friendly format.

Vacancy Report

Sort Hierarchy

The report uses the following sort sequence:

- Budget Entity
- Org code
- FLAIR org code
- Position number

Totals

The report includes the following totals:

- Org Totals – the total number of vacant positions for the org
- Agency Totals – the total number of vacant positions included in the report for the selected agency

Authorization

Users with a security role code of A, B, C, D, F, G, H, I, K, M, N, R, S, U, X and Y.

Process Steps

Step 1: Select Management; Data Warehouse Reports; HR Reports

Step 2: Select the Vacancy Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window is blank until the report results are returned. The results may take a while to return depending on the report and the selected filters. You can print or save the PDF file once the report is displayed. A blank report is returned if there is no data available for the selected report criteria.

For Excel, the report selection criteria screen remains on the screen until the report results are returned. The results may take a while to return depending on the report and the selected filters. Click the “Download to Excel” link to export to Excel once the results are returned. While the PDF reports are formatted for printing, the Excel reports are unformatted so you can work with the data as needed. If there is no data available for the selected report criteria, you will see a message indicating “No records found for selection. Please verify selection criteria.”

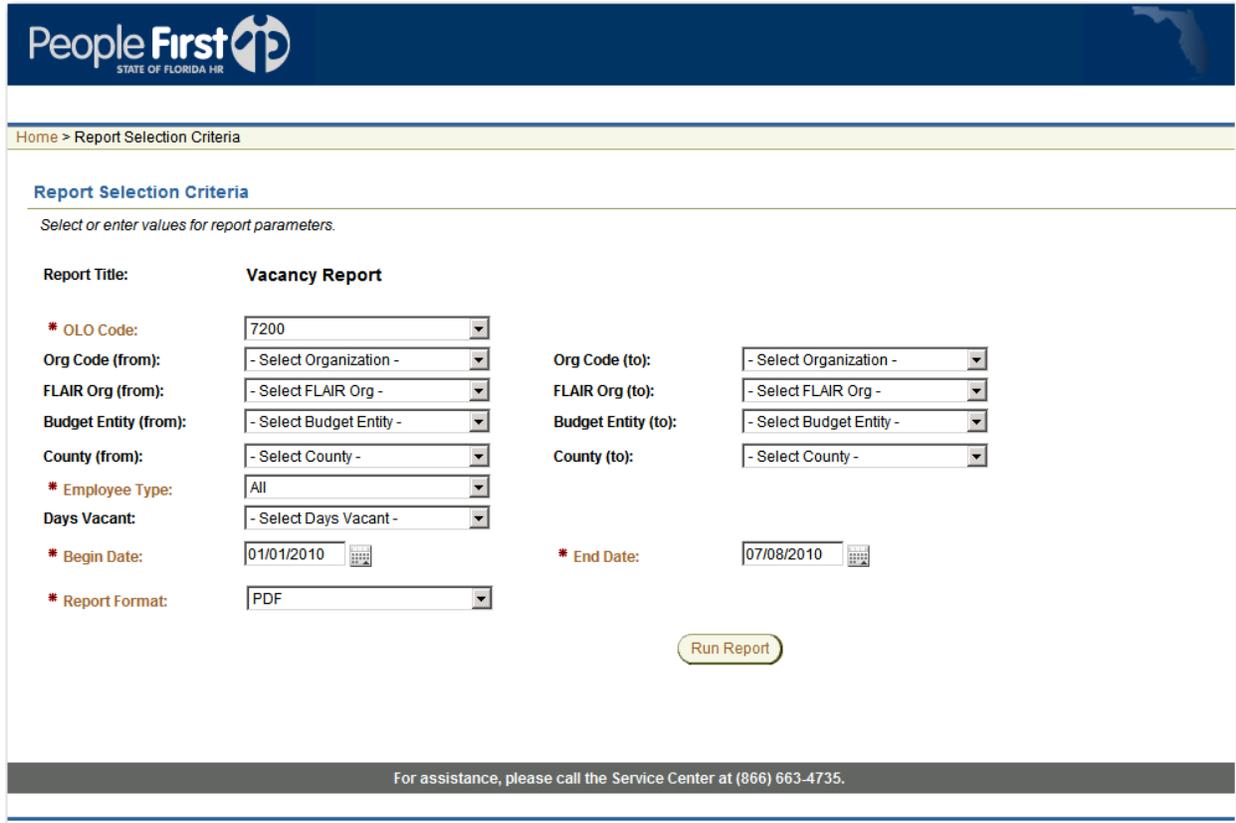
If a required filter or invalid data is entered, you will see the following error message at the top of the Report Selection Criteria screen: “Errors have occurred” and a red X is displayed next to the filter that needs to be corrected. Correct the filters and select the Run Report button.

Vacancy Report

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:



Home > Report Selection Criteria

Report Selection Criteria

Select or enter values for report parameters.

Report Title: **Vacancy Report**

* OLO Code: 7200

Org Code (from): - Select Organization -

FLAIR Org (from): - Select FLAIR Org -

Budget Entity (from): - Select Budget Entity -

County (from): - Select County -

* Employee Type: All

Days Vacant: - Select Days Vacant -

* Begin Date: 01/01/2010

* End Date: 07/08/2010

* Report Format: PDF

Run Report

For assistance, please call the Service Center at (866) 663-4735.

Report Sample

For best results, print this report as landscape, legal size. Below is a sample of the Vacancy Report:

POSITION VACANCY REPORT
DEPARTMENT OF MANAGEMENT SERVICES

PeopleFirst
STATE OF FLORIDA HR

RUN DATE: 07/08/2010
PAGE: 1

ORG CODE	ORG NAME	BUDGET ENTITY	FLAIR ORG	POS NUM	CLASS CODE	CLASS TITLE	PAY PLAN	PAY GRADE	CBU	PHYSICAL COUNTY CODE / NAME	POS FTE	DATE VACANT	VACANT DATE	BASE SALARY	PAY BAND	PAY BAND MINIMUM	BROADBAND OCCUPATION		
728005010000000000000000	OFFICE OF SUPPLIER DIVERSITY	72800500	72800501001	003260	6705	EXEC DIR - OFFICE OF SUPPLIER	09	930	99	037 LEON	1.00	139	02/19/2010	\$54,228.98	023	\$47,316.36	CHIEF EXECUTIVED		
728005010000000000000000	OFFICE OF SUPPLIER DIVERSITY	72800500	72800501001	003262	2053	DISTRIBUTED COMPUTER SYSTEMS A	08	425	89	037 LEON	1.00	21	06/17/2010	\$43,507.36	020	\$26,445.90	COMPUTER & INFORMATION SYSTEMS MANAGERS		
728005010000000000000000	OFFICE OF SUPPLIER DIVERSITY	72800500	72800501001	007878	0102	SECRETARY	01	007	01	037 LEON	.25	0		\$4,631.19	001	\$4,187.82	SECRETARIES, EXCEPT LEGAL, MEDICAL & EXEC		
728005010000000000000000	OFFICE OF SUPPLIER DIVERSITY	72800500	72800501001	008888					00		.00	27	06/11/2010						
728005010000000000000000	OFFICE OF SUPPLIER DIVERSITY	72800500	72800501001	801216	2234	OPERATIONS & MGMT CONSULTANT I	08	421	00	037 LEON	1.00	16	06/22/2010	\$34,501.48	007	\$28,093.00	MANAGEMENT ANALYSTS		
ORG TOTALS:																			
AGENCY TOTALS:																			

Leave and Attendance Reports



Leave Balance Report

Overview

Access the Leave Balance Report in the Data Warehouse Report module. You can use this report to see a listing of leave balance data for analysis and monitoring purposes. The report provides data back to the biweekly pay period beginning on April 4, 2008 and monthly pay period beginning on April 1, 2008. This data is updated **weekly** on Saturdays.

Definitions

The report includes the following fields:

- OLO Code – Operating level organization (OLO) code for the agency
- Org Code – Org code from the employee's position for the selected record
- Org Name – Org name associated with the org code
- FLAIR Org – FLAIR org from the employee's position for the selected record
- FLAIR Org Name – FLAIR org name from the employee's position for the selected record
- Employee Name – Employee's name (first, middle initial, last name)
- Emp ID – Employee's People First employee ID (PERNK)
- Pos Num – Position number for the selected record
- Interdept – Interdepartment number for the selected position record
- Class Code – Class code for the selected position record
- Class Title – Class title for the selected position record
- Adjusted Rate – Pay period amount including benefit matching costs
- Pay Period End Date – Ending date of the pay period
- Appt Status – Appointment status for the employee's record
- Beg Bal – Beginning leave balance as of the previous Saturday
- Amt Earned – Amount of leave earned as of the previous Saturday
- Amt Used – Amount of leave used as of the previous Saturday
- Amt Adjusted – Leave balance adjustment amount; based on date adjustment is processed, not effective date of adjustment
- End Bal – Ending leave balance as of the previous Saturday
- Creditable Service Months – Amount of creditable service months from the key service date screen

Leave Balance Report

Filters

The report uses the following filters:

- OLO Code – Required filter; will default to your agency’s OLO code.
- Org Code (from – to) – Optional filter. The filter defaults to “Select Organization” (no org code selected) and provides a drop down menu of available filters. To process the report for one org code, enter the org code in the “from” org code field. To process the report for a range of org codes, enter an org code in both the “from” and “to” org code fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- FLAIR Org Code (from – to) – Optional filter. The filter defaults to ‘Select FLAIR Org’ (no FLAIR org selected) and provides a drop down menu of available filters. To process the report for one FLAIR org, enter the FLAIR org in the “from” FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org in both the “from” and “to” FLAIR org fields. Once you make a selection in the “from” filter, the system removes that value from the “to” filter.
- Emp ID – Optional filter. Enter the employee’s ID number.
- Start Date – Required filter; enter a valid pay period begin date. If you fail to enter a valid pay period start date, the system won’t be able to return data and will provide you a blank report.
- End Date – Required filter; enter a valid pay period end date. If you fail to enter a valid pay period end date, the system won’t be able to return data and will provide you a blank report.
- Leave Type – Required filter; select one leave type from the drop down box in order to run the report.
- Report Format – Required filter; defaults to PDF. To export to Excel, select XLS. PDF report results download faster than XLS and are presented in a printer friendly format.

Sort Hierarchy

The report uses the following sort sequence:

- Org Code
- FLAIR Org Code
- Emp ID

Totals

The report provides the following totals:

- HR Org Code – the total number of employees
- FLAIR Org – the total number of employees
- OLO code – the total number of employees

Leave Balance Report

- Report – the total number of employees

Special Notes

The following special notes apply to the report:

- The report is not valid for State Courts System or Justice Administrative Commission.
- Data is refreshed every Saturday. Therefore, timesheets approved after Saturday will not be included until the next refresh is completed (one week later).
- Leave balance adjustments will always be presented in the pay period they are processed, regardless of the effective date of the adjustment.
- The report captures leave only from approved timesheets.

Authorization

Users with a security role code of A, B, C, D, F, G, H, I, K, M, N, S, T, U, X and Y will be able to process the report.

Process Steps

Step 1: Select Management; Data Warehouse Reports; Leave Reports

Step 2: Select the Leave Balance Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

For PDF, the report opens in a new window. The new window is blank until the report results are returned. The results may take a while to return depending on the report and the selected filters. You can print or save the PDF file once the report displays. A blank report is returned if there is no data available for the selected report criteria.

For Excel, the report selection criteria screen remains on the screen until the report results are returned. The results may take a while to return depending on the report and the selected filters. Click the “Download to Excel” link to export to Excel once the results are returned. While the PDF reports are formatted for printing, the Excel reports are unformatted so the user can work with the data as needed. If there is no data available for the selected report criteria, you will see a message indicating “No records found for selection. Please verify selection criteria.”

If you do not enter a required filter or enter invalid data, you will see the following error message at the top of the Report Selection Criteria screen: “Errors have occurred” and a red X is displayed next to the filter that needs to be corrected. Correct the filters and select the Run Report button.

Leave Balance Report

Report Selection Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

Report Selection Criteria

Select or enter values for report parameters.

Report Title: **Leave Balance Report**

OLO Code: 7200
 Org Code (from): - Select Organization -
 FLAIR Org (from): - Select FLAIR Org -
 Emp ID:
 Start Date: 01/01/2010
 Leave Type: 51 - Annual Leave
 Report Format: PDF

Org Code (to): - Select Organization -
 FLAIR Org (to): - Select FLAIR Org -
 End Date: 07/13/2010

[Run Report](#)

Report Selection

For best results, print this report as landscape, legal size. Below is a sample of the Leave Balance Report:

ANNUAL LEAVE BALANCE REPORT
DEPARTMENT OF MANAGEMENT SERVICES

PeopleFirst
STATE OF FLORIDA HR

RUN DATE: 06/23/2010
PAGE: 1

OLO CODE: 7200
ORG CODE: 726005010000000000000000
FLAIR ORG: 72600501001

ORG NAME: OFFICE OF SUPPLIER DIVERSITY
FLAIR ORG NAME: MBE-OFFICE SUPPLIER DIVERSITY GR

EMPLOYEE NAME	EMP ID	POS NUM	INTERDEPT	CLASS CODE	CLASS TITLE	ADJUSTED PAY PERIOD RATE	END DATE	APPT STATUS	BEG BAL	AMT EARNED	AMT USED	AMT ADJUSTED	END BAL	CREDITABLE SERVICE MONTHS
STEPHANIE F GERVAIS	153800	003268	0000000000	2234	OPERATIONS & MGMT CONSULTANT I - SES	\$1,782.04	06/10/2010	Exempt	582.000	0.000	0.000	0.000	582.000	320
LORI E ROSSMAN	165518	003275	0000000000	0709	ADMINISTRATIVE ASSISTANT I - SES	\$1,508.74	06/10/2010	Exempt	420.523	0.000	0.000	0.000	420.523	340
TYLER F BROCK	202290	003266	0000000000	2224	SENIOR MANAGEMENT ANALYST I - SES	\$1,732.13	06/10/2010	Exempt	335.831	0.000	0.000	0.000	335.831	203
JAMES T CZARNECKI	213536	003262	0000000000	2053	DISTRIBUTED COMPUTER SYSTEMS ADMIN - SES	\$2,117.44	06/10/2010	Exempt	125.000	0.000	0.000	0.000	125.000	111
MELISSA D ASSAROUPE	213716	003273	0000000000	0812	PURCHASING AGENT II - SES	\$1,491.04	06/10/2010	Exempt	121.750	0.000	0.000	0.000	121.750	333
ROCKY G WILLIAMS	882078	003264	0000000000	3344	LABOR, EMPLOYMENT & TRAIN ADMIN I - SES	\$1,803.18	06/10/2010	Exempt	240.000	0.000	0.000	0.000	240.000	19
TAMARA H TAMAYO	832986	003270	0000000000	2238	OPERATIONS & MGMT CONSULTANT MGR - SES	\$1,966.20	06/10/2010	Exempt	167.000	0.000	0.000	0.000	167.000	33
KELVIN B SOUTHERLAND	929273	901216	0000000000	2234	OPERATIONS & MGMT CONSULTANT MGR - SES	\$3,539.85	06/10/2010	Probationary	14.870	0.000	0.000	0.000	14.870	2
FLAIR ORG CODE TOTAL EMPLOYEES:									8	2,006.774	0.000	0.000	2,006.774	
ORG CODE TOTAL EMPLOYEES:									8	2,006.774	0.000	0.000	2,006.774	
OLO CODE TOTAL EMPLOYEES:									8	2,006.774	0.000	0.000	2,006.774	
REPORT TOTAL EMPLOYEES:									8	2,006.774	0.000	0.000	2,006.774	

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Leave Summary Report

Overview

Access the Leave Summary Report in the Management Reports module of the People First system. The report provides agencies information about current leave balances for their employees. The report is real-time and reflects an employee's current balances as of the point in time the report is processed.

Definitions

The report includes the following fields:

- Emp ID – Employee's People First employee ID (PERNK)
- Last Name – Employee's last name
- First Name – Employee's first name
- MI – Employee's middle initial
- Pos Num – Position number for the selected record
- Org Code – Org code from the employee's position for the selected record
- FLAIR Org – FLAIR org from employee's position for the selected record
- Annual Leave – Employee's current annual leave balance
- Sick Leave – Employee's current sick leave balance
- Personal Holiday (Y or N) – "Y" displays if the Personal Holiday is available and "N" displays if it has been used
- Special Comp – Employee's current special comp leave balance
- Regular Comp – Employee's current regular comp leave balance
- FLSA Comp – Employee's current FLSA comp leave balance

Filters

The report uses the following filters:

- Report By – Required filter; user must select one of the following:
 - Employee – Enter the employee's People First employee ID (PERNK) to process the report
 - Timekeeper ID – Enter the timekeeper's People First employee ID (PERNK) to pull current balances for employees in their group
 - Supervisor – Enter the supervisor's People First employee ID (PERNK) to pull current balances for their direct reports
 - Direct Reports Level – Available only when you select the Supervisor Report by Filter
 - 1 (default value) results in the supervisor's direct reports being returned

Leave Summary Report

- 2 results in the supervisors direct reports and their direct reports being returned
- OLO Code – Required filter; defaults to your agency’s OLO code.
- Org Code – Optional filter. To process the report for one org code, enter the org code in the “from” org code field. To process the report for a range of org codes, enter an org code in both the “from” and “to” org code fields.
- FLAIR Org – Optional filter. To process the report for one FLAIR org code, enter the FLAIR org code in the “from” FLAIR org field. To process the report for a range of FLAIR org codes, enter a FLAIR org code in both the “from” and “to” FLAIR org fields.

Sort Hierarchy

The report uses the following sort sequence:

- Org Code
- Employee ID

Authorization

Users with a security role code of A, B, C, F, G, H, I, K, M, N, S, T, U, X and Y will be able to process this report.

Process Steps

Step 1: Select Management; Reports; Time and Payroll Reports

Step 2: Select the Leave Summary Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

If the report finishes in **less than three minutes**, the report details display in a grid at the bottom of the report selection screen. To view the report in PDF, select the View PDF button. To view the report in Excel, select the Export to Microsoft Excel link. PDF reports are formatted for printing, while the Excel reports are unformatted so the user can work with the data as needed.

If the report takes **more than three minutes**, you will receive a message that the report is taking longer than three minutes and to access the report in the “My Reports” screen. Generally, you will be able to access the report in the “My Reports” screen within 15 to 20 minutes. The “My Reports” screen is located on the Reports menu.

If there is no data available for the report criteria, you will receive a message stating “No data found for selection.” If you enter an invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to the data.

Leave Summary Report

Report Selection

Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

Leave Summary Report

Selection Area
Report By: Select Report By
OLO: * 7200

Range Selection
Org Code: To
FLAIR Org: To

Menu Run Report View PDF

Leave Summary Report

Selection Area
Report By: Select Report By
OLO: * Select Report By
Employee

Range Selection
Supervisor
Timekeeper ID
Org Code: To
FLAIR Org: To

Menu Run Report View PDF

Leave Summary Report

Selection Area
Report By: Employee
OLO: * 7200
Emp ID: 00000000

Range Selection
Org Code: To
FLAIR Org: To

Menu Run Report View PDF

Leave Summary Report

Selection Area
Report By: Supervisor
OLO: * 7200
Supervisor ID: 00000000 Direct Reports Level: 1

Range Selection
Org Code: To
FLAIR Org: To

Menu Run Report View PDF

Leave Summary Report

Selection Area
Report By: Timekeeper ID
OLO: * 7200
Timekeeper ID: 00000000

Range Selection
Org Code: To
FLAIR Org: To

Menu Run Report View PDF

Leave Summary Report

Report Sample

The report should be printed as landscape, letter size. Below is a sample of an Adobe Acrobat (PDF) report:

LEAVE SUMMARY REPORT
DEPARTMENT OF MANAGEMENT SERVICES

People First
STATE OF FLORIDA HR

RUN DATE: 07/08/2010 15:03:21
PAGE: 1

EMP ID	LAST NAME	FIRST NAME	MI	POS NUM	ORG CODE	FLAIR ORG	ANNUAL LEAVE	SICK LEAVE	PERSONAL HOLIDAY	SPECIAL COMP	REGULAR COMP	FLSA COMP
					727501060010000000000000	72750106001	655.997	228.320	Y	0.000	0.000	0.000

Training Reports



Training Library Report

Overview

The Training Library Report is available within the Management Reports module of the People First system, under the E-Learning Report link. The report provides listing of all training courses by agency's OLO code.

Definitions

The report includes the following filters:

- Agency Name – Contains agency name where course was taken or “Statewide” courses.
- Course Code – Contains the course code for the applicable course.
- Course Name – Name of training course.
- Begin Date – The begin date for the training course in MM/DD/YYYY format.
- End Date – The end date for the training course in MM/DD/YYYY format.

Filters

The report includes the following filters:

- OLO – Required filter; will default to your agency's OLO code. Based on user's access additional OLO's may be available for selection.
- Begin Date – Required filter; begin date range value entered by user. To filter for a single Begin Date, user can enter the same values in the “From” and “To” parameter field.
- End Date – Required filter; will list agency training courses as of the report end date.
- Course Name – Optional filter; you can process the report for one training course by entering the course name in the Course Name field.

Sort Hierarchy

The report uses the following sort sequence:

- *Course Code*
- *Course Name*
- *Begin Date*

Authorization

Users with a security role code of A, C, G, H, J, K, M, N, S, U, X and Y will be able to process this report.

Process Steps

Step 1: Select Management; Reports; E-Learning Reports

Step 2: Select the Training Library Report

Step 3: Select/enter the filter values

Step 4: Select the Run Report button

Training Library Report

If the report finishes in **less than three minutes**, the report details display in a grid at the bottom of the report selection screen. To view the report in PDF, select the View PDF button. To view the report in Excel, select the Export to Microsoft Excel link. PDF reports are formatted for printing, while the Excel reports are unformatted so the user can work with the data as needed.

If the report takes **more than three minutes**, you will receive a message that the report is taking longer than three minutes and to access the report in the “My Reports” screen. Generally, you will be able to access the report in the “My Reports” screen within 15 to 20 minutes. The “My Reports” screen is located on the Reports menu.

If there is no data available for the report criteria, you will receive a message stating, “No data found for selection.” If you enter an invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to the data.

Report Selection Criteria Sample

Below is a sample of the report selection criteria screen and the available filters:

Report Sample

The report should be printed as landscape, letter size. Below is a sample of an Adobe Acrobat (PDF) report:

AGENCY NAME	COURSE CODE	COURSE NAME	BEGIN DATE	END DATE
DEPARTMENT OF MANAGEMENT SERVICES	00000001	DMS - CUSTOMER SERVICE	05/01/2006	12/31/9999
STATEWIDE	00000109	STATE OF FLORIDA LEADERSHIP	01/01/2008	12/31/9999
DEPARTMENT OF MANAGEMENT SERVICES	00000365	DMS - SEXUAL HARASSMENT TRAINING	01/03/2005	12/31/9999
DEPARTMENT OF MANAGEMENT SERVICES	00000667	BUSINESS WRITING/PLAIN LANGUAGE	05/07/2007	12/31/9999
STATEWIDE	00000761	SUNSHINE LAW AND PUBLIC RECORDS ACT COURSE	01/01/2007	12/31/9999
DEPARTMENT OF MANAGEMENT SERVICES	00000946	DMS - INFORMATION SECURITY AWARENESS	06/01/2007	12/31/9999
DEPARTMENT OF MANAGEMENT SERVICES	00001141	HUMAN RELATIONS COMMISSION DIVERSITY TRAINING	06/01/2007	12/31/9999
DEPARTMENT OF MANAGEMENT SERVICES	00001234	FIRE WARDEN	09/25/2007	12/31/9999
STATEWIDE	00001281	PF DATA WAREHOUSE USING IMPROMPTU--INTRODUCTION	11/01/2007	12/31/9999
STATEWIDE	00001312	PLANNING, SCHEDULING & REQUIREMENT ANALYSIS	01/01/2004	12/31/9999
STATEWIDE	00001313	DEVELOPING & MANAGING RFP'S	01/01/2004	12/31/9999
STATEWIDE	00001314	LEGAL ASPECTS	01/01/2004	12/31/9999
STATEWIDE	00001315	CONTRACT ADMINISTRATION	01/01/2004	12/31/9999
STATEWIDE	00001316	CONTRACT MANAGEMENT	01/01/2004	12/31/9999
STATEWIDE	00001317	GENERAL PUBLIC PROCUREMENT	01/01/2004	12/31/9999
STATEWIDE	00001318	INTERMEDIATE PUBLIC PROCUREMENT	01/01/2004	12/31/9999