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GETA Setup Overview

GETA setup refers to entering data into GETA so that time and attendance information is processed according to your district's business needs. The figure below identifies data setup tasks required for GETA districts. Once initial data setup is complete, most setup tasks are completed on an annual or as-needed basis.

Figure 1-4. GETA Data Setup Tasks

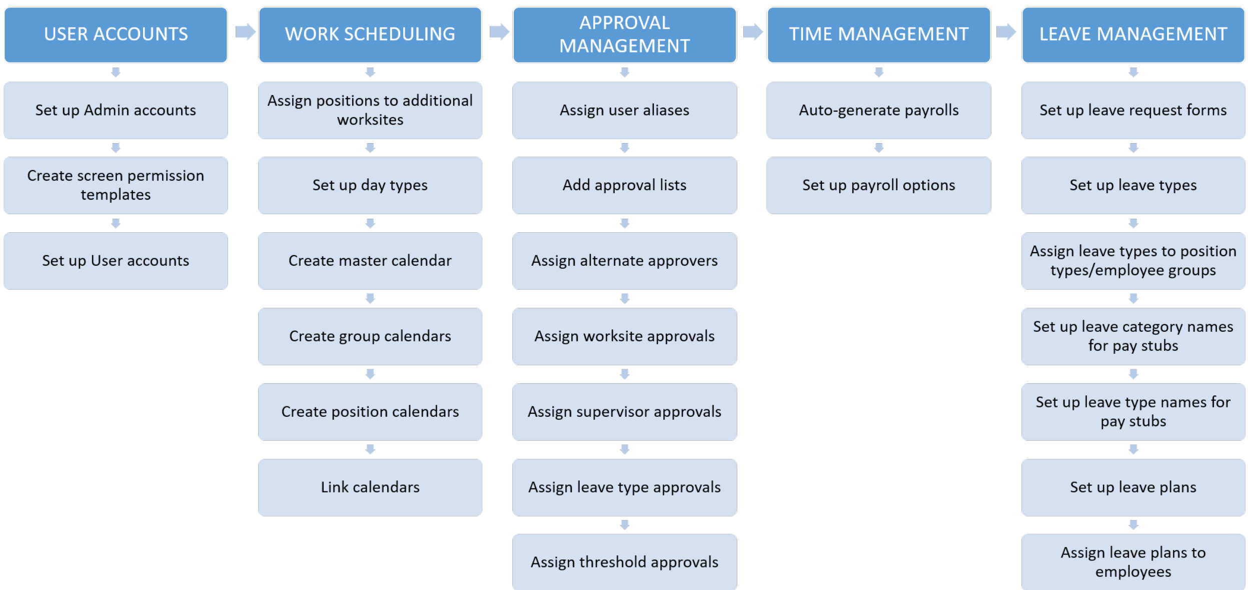


Table 1-2. GETA Setup Task Descriptions

Task Category	Task	Description
User Account Tasks	Set up Admin accounts	An **Admin account** is an initial user account added to GETA for the purpose of setting up other accounts and/or adding initial data to GETA. Admin accounts are user accounts with special permissions to complete advanced tasks. After the initial Admin account is set up, additional Admin accounts can be set up as needed.
	Create screen permission templates	**Screen permissions** define which GETA screens that users can open. **Screen permission templates** are used to apply a defined set of screen permissions to multiple users. Using screen permission templates are optional but may save time entering screen permissions for multiple users later. Screen permission templates can be created and used as needed.
	Set up user accounts	A **user account** is an identity set up in GETA to define login credentials, user authorizations, and email addresses. User accounts are required for employees to log in to GETA. User accounts can be set up and maintained as needed.
Work Scheduling Tasks	Assign positions to additional worksites	The worksite that positions are assigned to in Galaxy are automatically assigned to positions in GETA. However, in GETA, positions can be assigned to more than one worksite so you have to add the additional worksite assignments to GETA. Then, each position-worksite can have its own position calendar and work schedule. Positions can be assigned to additional worksites as needed.
	Set up day types	**Day types** are different types of working and non-working days that are identified on calendars and used in time and leave calculations. For example, holidays and weekends can be set up as non-working days while weekdays can be set up as working days. An initial set of day types is set up before you begin to process information with GETA but you can add more day types as needed.
	Create master calendar	The **master calendar** is a calendar your district sets up to identify holidays that are available to all employees throughout a fiscal year. A master calendar must be set up for each new fiscal year.
	Create group calendars	**Group calendars** are calendars your district may set up to identify working and non-working days for groups of employees with similar characteristics. For example, a group calendar can be set up for all 10-month employees. Work schedules can be defined for group calendars. Group calendars are optional but recommended.

Task Category	Task	Description
	Create position calendars	A **position calendar** is a created for a position assigned to a specific worksite, which is called a **position worksite**. An employee can have multiple position calendars, one for each position worksite. For example, a grounds crew member might work at three different schools, each with a different work schedule. So, three different position calendars can be created for this employee. Work schedules can be defined for position calendars. Position calendars are optional but recommended.
	Link calendars	**Linked calendars** are associated with each other in such a way that changes made to one calendar are automatically made to the other calendar.
Approval Management Tasks	Assign user aliases	A **user alias** is a nickname for an assigned approver position. For example, the user alias **OfficeMgr** might be used for the School Office Manager, regardless of the employee who is actually assigned to that position. User aliases are set up as needed.
	Add approval lists	An **approval list** is a list of employees, assigned by alias ID, that are assigned to approve GETA requests. These employees are called **assigned approvers**. Multiple approval lists can be set up for different purposes. Approval lists are set up as needed.
	Assign alternative approvers	An **alternate approver** is an employee who approves requests in place of the assigned approver for a specific period of time. Alternate approvers are set up as needed.
	Assign worksite approvals	A **worksite approval list** identifies the employees who approve requests at a particular worksite. Worksite approval lists are assigned to leave, time entry, and overtime approval functions. This task typically only needs to be completed once as changes to approvers are made in the approval lists themselves.
	Assign supervisor approvals	A **supervisor approval list** is assigned to an employee so their supervisor can approve their requests. This task only needs to be completed when an employee reports to a different supervisor. You can assign supervisor approval lists when you assign leave plans to employees or as a standalone task.
	Assign leave type approvals	A **leave type approval list** is assigned to a leave type to ensure that all leave requests for that type are approved by specific employee(s). This task typically only needs to be completed once as changes to approvers are made in the approval list itself. You can assign leave type approvals when you set up leave types or as a standalone task.
	Assign threshold approvals	A **threshold approval list** is assigned to a position type/employee group for a leave type so that all leave requests for that type that exceed a maximum number of hours can be approved by specific employee(s). This task typically only needs to be completed once as changes to approvers are made in the approval list itself. You can assign threshold approvals when you set up leave types for position types/employee groups.

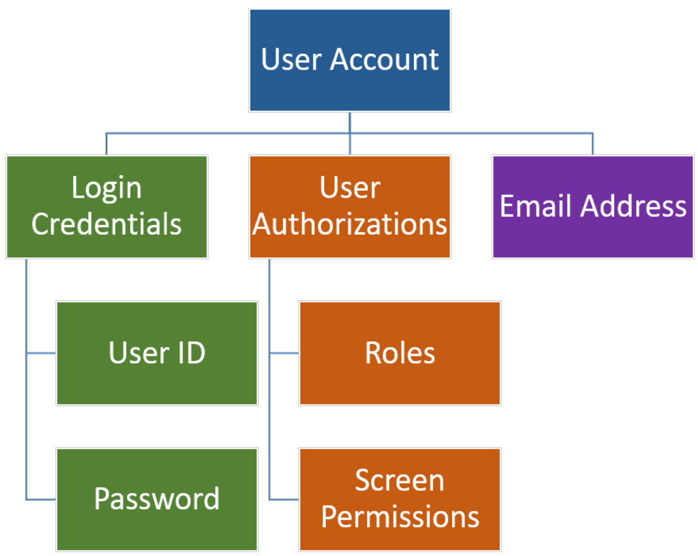
Task Category	Task	Description
Time Management Tasks	Auto-generate payrolls	Payroll information for the current fiscal year must be populated in GETA before your district can process time and attendance information. When you auto-generate payroll information, payrolls for the fiscal year and corresponding default options are automatically set up on all pertinent GETA screens. This task must be completed at the beginning of each new fiscal year.
	Set up payroll options	**Payroll options** include the start and end dates of leave request periods and cutoff dates and times for leave request and timesheet approvals. Leave requests and timesheets must be approved by these cutoff dates and times in order to be included in a corresponding payroll. Payroll options can be updated every new fiscal year.
Leave Management	Set up leave request form	The **Leave Request form** is a set of fields on GETA screens that are filled out to request time off from work. This form is used to enter, modify, and view leave requests. This form must be set up before entering leave requests and can be changed as needed.
	Set up leave types	**Leave types** are specific types of leave used by employees. Leave types are set up before you begin to process leave with GETA but more leave types can be added as needed. You can also change the names of leave types that appear on pay stubs.
	Assign leave types to position types/employee groups	**Leave type assignments** identify the leave types that can be used by employees assigned to specific position types and employee groups. Leave types are assigned before you begin to use GETA to process leave but more assignments can be added as needed.
	Set up leave category names for pay stubs	**Leave categories** are categories of leave earned by employees. Leave categories are defined by GETA and cannot be changed. You can, however, customize the names of leave categories that appear on pay stubs.
	Set up leave type names for pay stubs	Leave type names that appear on pay stubs can be customized.
	Set up leave plans	A **leave plan** provides the criteria for defining the amount of leave employees are advanced or earn in a fiscal year. Leave plans are set up before you begin to process leave with GETA but you can add more plans as needed.
	Assign leave plans to employees	Leave plans must be assigned to employees before leave requests are submitted. Leave plans can be assigned as needed.

User Accounts

A **user account** is an identity set up in GETA to define login credentials, user authorizations, and email addresses. User accounts are made up of several components. **Login credentials** are the user ID and password an employee needs to log in to GETA. **User authorizations** give a user permission to access specific functions by identifying their functional role and controlling which screens they can access. For example, users who enter timesheets for other employees need access to the timekeeping screens in GETA but they do not need access to the screens that are used to maintain calendars and work schedules. Finally, **email addresses** are defined in user accounts so that users can receive email notifications about various GETA activities.

The components of a user account are shown in the figure below.

Figure 1-5. User Account Components



Login Credentials

The user ID and password an employee needs to log in to GETA.

User Authorizations

Gives a user permission to access specific functions by identifying their functional role and controlling which screens they can access. For example, users who only enter timesheets for other employees need access to the timekeeping screens in GETA but they do not need access to screens that are used to maintain calendars and work schedules.

Email Address

The name of an electronic mailbox for sending and receiving messages on a computer network. GETA sends notifications about various activities to these email addresses.

One user account is required for each GETA user. Unlike Galaxy, where districts submit user account requests to the RCOE Service Desk, GETA user accounts are set up and maintained by each district. GETA accounts can only be set up for active employees assigned to a position.

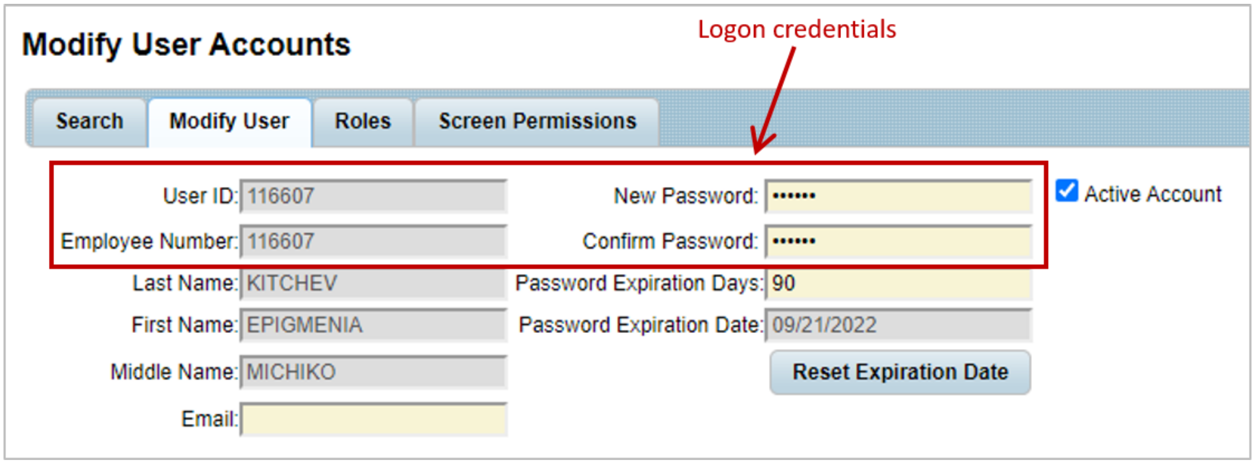
For more information, see:

- *Login Credentials on page 16*
- *User Authorizations on page 19*
- *Email Addresses on page 26*

For instructions on setting up user accounts, see *Adding a User Account on page 77*.

Login Credentials

Login credentials are the user ID and password an employee needs to log in to GETA. When you set up an account for a GETA user, you enter a unique combination of a user ID and a password for that user. Login credentials are defined on the Modify User Accounts screen.



For more information, see:

- *User IDs on page 17*
- *Passwords on page 17*

For instructions on setting up user accounts, see *Adding a User Account on page 77*.

User IDs

A **user ID** is a code that uniquely identifies a GETA user. The user ID that you create for this employee, in combination with a **password**, verifies the identity of the employee when they log in to GETA.

A user ID can be any combination of up to 10 letters and numbers. You can set up a GETA user account with a user ID that is different from the **employee ID**, but is highly recommended that you use the employee ID. This way, if you have an employee who works in multiple districts, it is much easier to find their information if their user ID is set up using their employee number for each district.

Passwords

A **password** is a secret code that must be used to log in to GETA. A password, in combination with a **user ID**, verifies the identity of a user during the GETA login process.

The following rules apply to passwords:

- Passwords must be 8 to 16 characters long.
- Passwords must contain characters from three of these categories: uppercase letters, lowercase letters, numbers, or symbols (excluding ' " ; / : = \ |).
- New passwords cannot be the same as the current or previous three passwords.
- Passwords cannot contain a portion of the user's name. For example, if the user's last name is McDonald, the password cannot contain the letters don, ald, mcd, ona, and so on.

The following are examples of valid passwords:

- **Opn5esame** (contains a number, an uppercase letter, and lowercase letters)
- **4Get!t!** (contains a number, uppercase letters, lowercase letters, and special characters)
- **!73Csch#jA** (contains special characters, numbers, uppercase letters, and lowercase letters)

The best passwords to use are those that are hard to guess by someone who might want to hack into a GETA account. The following tips will help you to choose strong passwords that are not easy to guess.

- Do not choose a password that includes personal information, such as a name or the name of a pet.
- Do not use real words. Password cracking software processes dictionary words to try to determine passwords.
- The longer the password is, the harder it is to guess.
- Do not write passwords down or set a password when someone else has view of your computer.

User accounts are set up with an initial password. Your district can set up one or more designated users to maintain all account passwords or it can allow individual employees to change their own passwords.

For instructions on setting up passwords, see:

- *To learn how GETA Administrators set up passwords in user accounts,* see *Adding a User Account on page 77*.
- *To learn how users can change their own passwords,* see the *GETA Employee Guide*.

User Authorizations

User authorizations give a user permission to access specific functions by identifying their functional role and controlling which screens they can access. When you set up an account for a GETA user, you define the user's **role(s)** and **screen permissions**.

For more information, see:

- *User Roles on page 20*
- *Screen Permissions on page 24*

For instructions on setting up user permissions, see *Adding a User Account on page 77*.

User Roles

Roles identify a set of screens that a user can be permitted to access to complete specific tasks. For example, Joe is responsible for maintaining the master and group calendars for a district. Joe is not responsible for any other GETA setup functions. Therefore, to allow access to the GETA calendar screens, Joe must first be assigned to the Admin role, which allows users to create and maintain calendars as well as other functions. Then, you permit Joe to open only the calendar-related screens that he needs to do his job.

Roles are flexible and can be defined in many ways, as shown in the following examples.

General information

All GETA users should be assigned to the **General** role. This role allows employees to enter and view their own timesheets, leave requests, and other employee-specific information. General users cannot access any other screens unless they have additional roles assigned to them.

General

Sensitive data

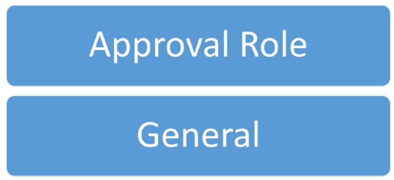
Some employees require enhanced functionality to enter and maintain sensitive data. For example, some users may need to enter and maintain user accounts, define various options used on GETA screens, set up calendars and work schedules, or work with data for multiple employees. In addition to the General role, these users should also be assigned to the **Admin** role. These users can be permitted to access all or some of the GETA screens that require the General and Admin roles. However, they cannot access any other screens unless they have additional roles assigned to them.

Admin

General

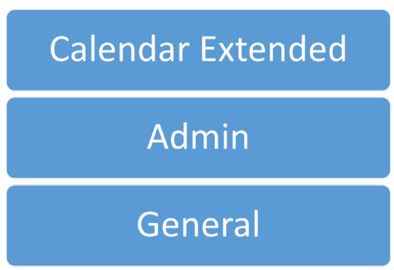
Approvals

Employees who approve GETA requests such as timesheets and leave requests require an appropriate approval role. Each type of document that requires approval requires a different approval role. For example, to approve leave requests, a user must be assigned to the Leave Approval role whereas to approve timesheets, a user must be assigned to the Time Entry Approver role. In addition to the General role, these users should also be assigned to an approval role.

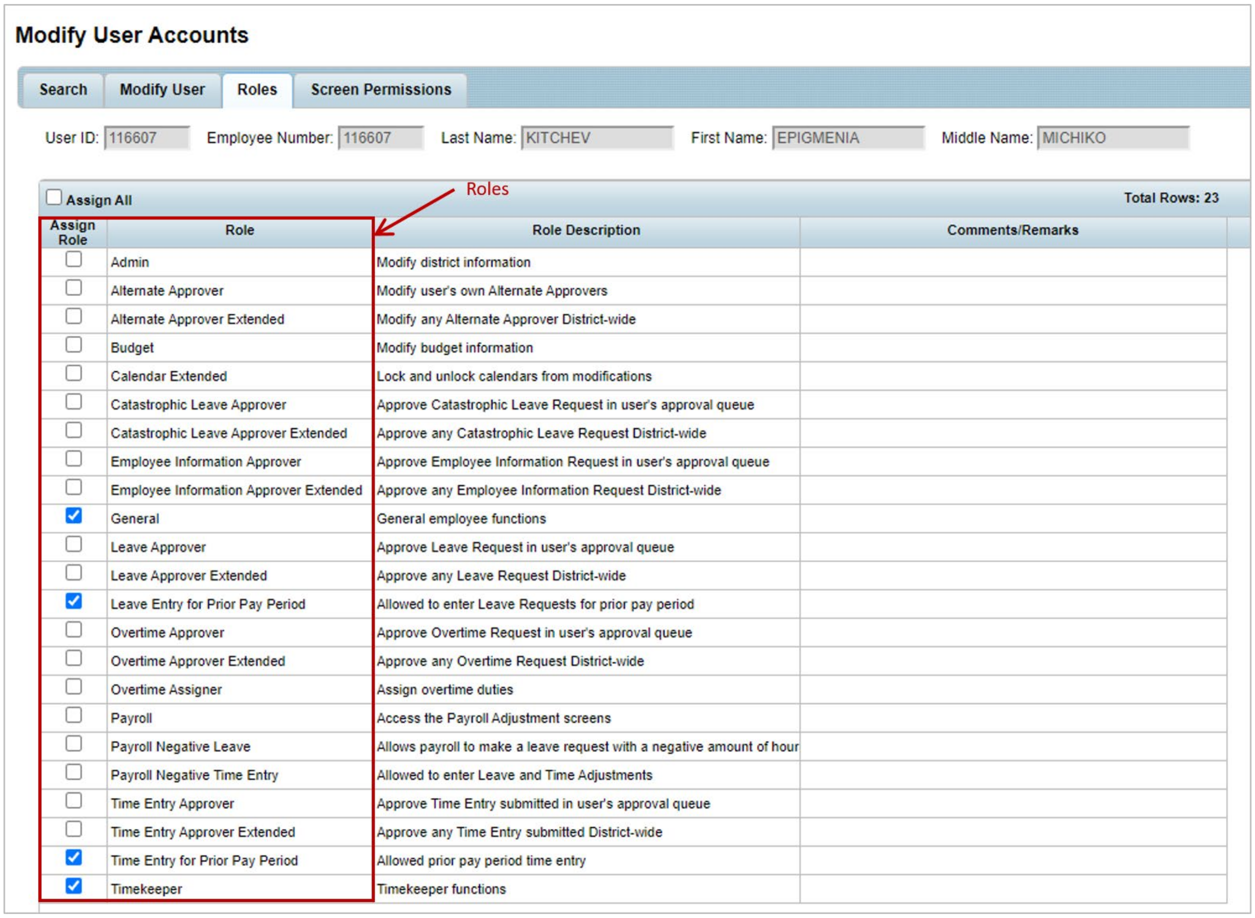


Extended functionality

A few users may require functionality that extends beyond the functions offered by a particular role. For example, users assigned to the Admin role can be permitted to enter and maintain calendars and work schedules. However, to lock calendars from being changed (or unlock them as needed) users also need to be assigned to the **Calendar Extended** role.



Roles are assigned to a user account on the Modify User Accounts screen, shown below.



Assign Role	Role	Role Description	Comments/Remarks
☐	Admin	Modify district information	
☐	Alternate Approver	Modify user's own Alternate Approvers	
☐	Alternate Approver Extended	Modify any Alternate Approver District-wide	
☐	Budget	Modify budget information	
☐	Calendar Extended	Lock and unlock calendars from modifications	
☐	Catastrophic Leave Approver	Approve Catastrophic Leave Request in user's approval queue	
☐	Catastrophic Leave Approver Extended	Approve any Catastrophic Leave Request District-wide	
☐	Employee Information Approver	Approve Employee Information Request in user's approval queue	
☐	Employee Information Approver Extended	Approve any Employee Information Request District-wide	
☑	General	General employee functions	
☐	Leave Approver	Approve Leave Request in user's approval queue	
☐	Leave Approver Extended	Approve any Leave Request District-wide	
☑	Leave Entry for Prior Pay Period	Allowed to enter Leave Requests for prior pay period	
☐	Overtime Approver	Approve Overtime Request in user's approval queue	
☐	Overtime Approver Extended	Approve any Overtime Request District-wide	
☐	Overtime Assigner	Assign overtime duties	
☐	Payroll	Access the Payroll Adjustment screens	
☐	Payroll Negative Leave	Allows payroll to make a leave request with a negative amount of hour	
☐	Payroll Negative Time Entry	Allowed to enter Leave and Time Adjustments	
☐	Time Entry Approver	Approve Time Entry submitted in user's approval queue	
☐	Time Entry Approver Extended	Approve any Time Entry submitted District-wide	
☑	Time Entry for Prior Pay Period	Allowed prior pay period time entry	
☑	Timekeeper	Timekeeper functions	

For details about each row, see *Table 1-3 on page 23*.

For instructions on setting up roles for a user account, see *Adding a User Account on page 77*.

Table 1-3. GETA User Roles

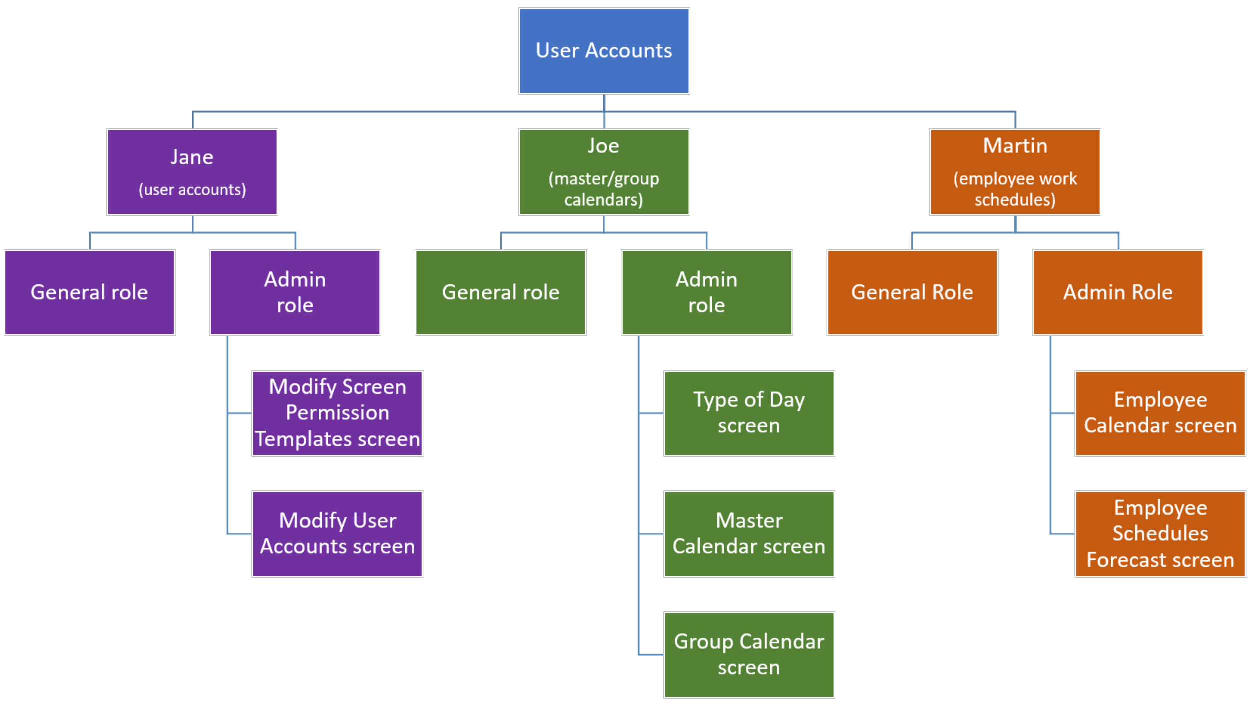
This role ...	Allows a user to ...
Admin	Work with sensitive information including user accounts, master and group calendars and work schedules, district-wide GETA options, and catastrophic sick leave. Also allows user to work with employee calendars, work schedules, schedule forecasts, and leave requests for multiple employees in the district.
Alternate Approver	Allows approvers to designate their own alternate approvers.
Alternate Approver Extended	Allows a user to designate alternate approvers for the entire district.
Budget	Set up funding line approval lists for overtime.
Calendar Extended	Lock and unlock calendars from modification.
Employee Information Approval	Approve modifications to employee information routed to their approval queue*.
Employee Information Approval Extended	Approve modifications to employee information for any change made in the district.
General	Update and view own time and attendance information. This role should be assigned to all users.
Leave Approver	Approve leave requests routed to their approval queue.*
Leave Approver Extended	Approve leave requests for any employee in the district.
Leave Entry for Prior Pay Period	Enter leave requests for a prior, closed pay period.
Overtime Approver	Approve overtime requests routed to their approval queue.*
Overtime Approver Extended	Approve overtime requests for any employee in the district.
Overtime Assigner	Assign overtime to employees.
Payroll	Set up payroll cutoff dates for leave requests and enter payroll adjustments.
Payroll Negative Leave	Makes the **Leave Adjustment** check box on the Employee Leave Request screen editable and allows user to enter negative hours on leave requests to create leave adjustments.
Payroll Negative Time Entry	Enter time entry and leave adjustments.
Time Entry Approver	Approves timesheets routed to their approval queue*.
Time Entry Approver Extended	Approves timesheets for anyone in the district.
Timekeeper	Perform timekeeping functions.

*An **approval queue** is a list of requests and documents that need to be approved by a particular user. Approvers are GETA users assigned to specific approval roles and the approval queue is built using one or more approval lists, which define the approvers for certain types of documents.

Screen Permissions

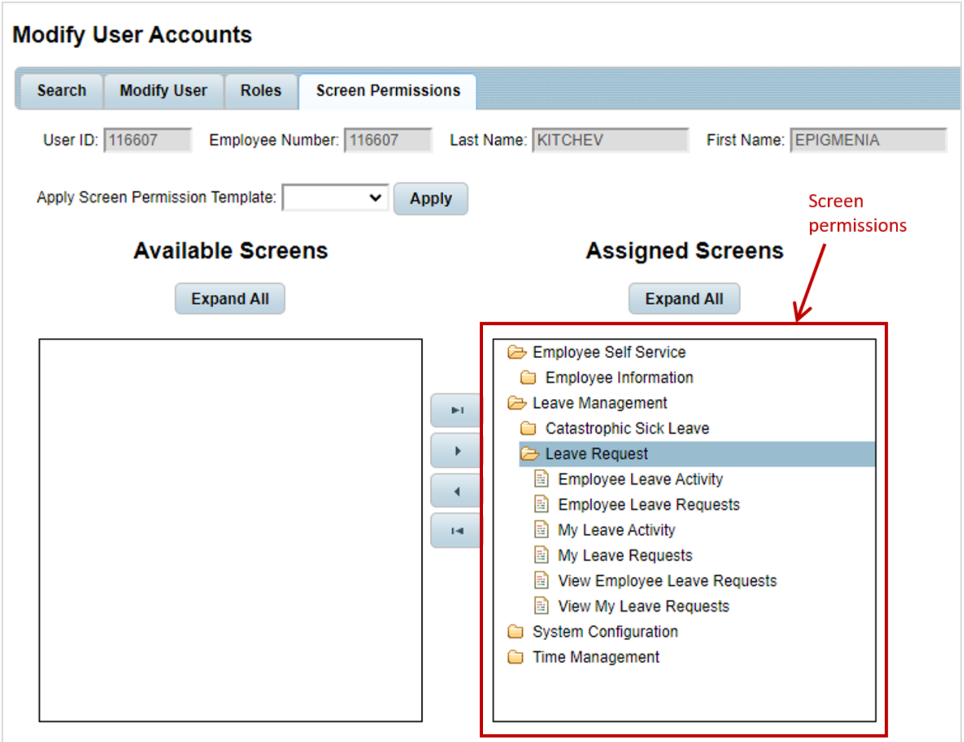
Screen permissions define which GETA screens within a role that users can open. For example, the Admin role provides broad access to sensitive information that not all users assigned to the Admin role may need. You may want to split the functionality of the Admin role up over multiple users using screen permissions. An example of how you can do this is shown in the following figure.

Figure 1-6. Different Screen Permissions within a Role



In the figure above, Jane is responsible for adding and maintaining GETA user accounts. Joe sets up master and group calendars and group work schedules. Martin sets up position calendars and work schedules. Only the screens they need to complete their respective tasks has been assigned to their user accounts.

Screen permissions are assigned to a user account on the Modify User Accounts screen.



For instructions on setting up user permissions, see *Adding a User Account on page 77*.

Tip

To make it easier to assign the same screen permissions to multiple users, you can create a **screen permission template**. You assign screens to the template, and then apply the template to all user accounts that require access to the set of screens. For instructions on setting up screen permission templates, see *Adding a Screen Permission Template on page 72*.

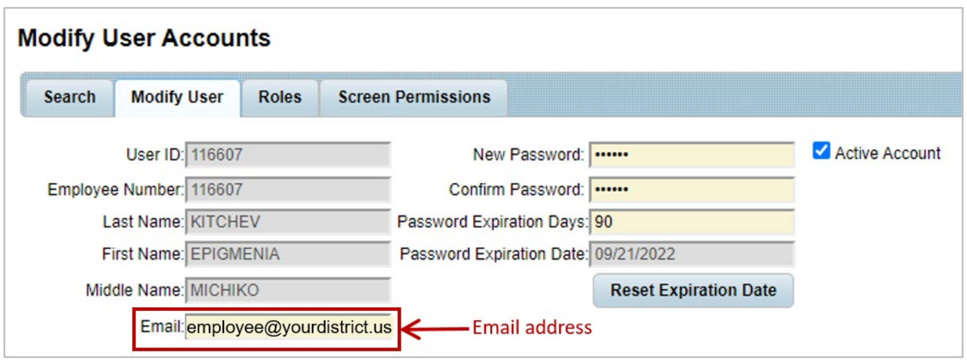
Email Addresses

An **email address** is the name of an electronic mailbox for sending and receiving messages on a computer network. Email addresses are required in GETA so that notifications of various activities can be sent to the appropriate users.

The following GETA activities generate emails that are sent to users:

- Leave request statuses are emailed to leave requesters.
- Approval notices are emailed to leave approvers and alternate approvers.

GETA user accounts must be set up with an email address on the Modify User Accounts screen, shown below.



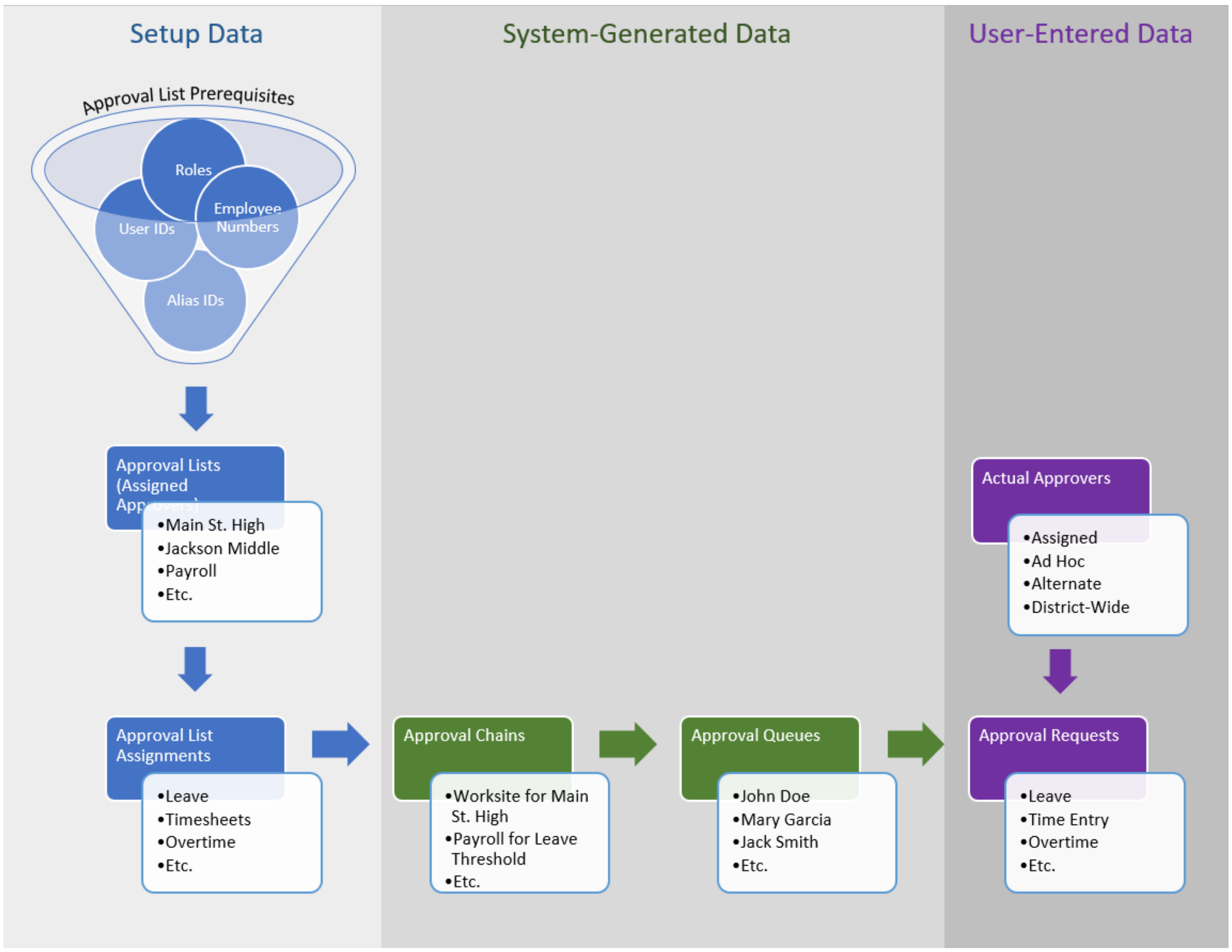
Your district can allow one or more designated users to maintain all email addresses or it can allow individual employees to change their own email addresses. For more information, see:

- *To learn how maintain email addresses in user accounts,* see *Adding a User Account on page 77*.
- *To learn how individual users can change their own email addresses,* see the *GETA Employee Guide*.

Approvals

Information processed by GETA may need to be approved by one or more individuals at your district. Before setting up approvals for your district, it may be helpful to understand approval terminology, the components involved in setting up approvals, and where these components appear on GETA screens. The figure below illustrates the approval setup components and identifies the terminology you should understand.

Figure 1-7. Approver Setup Components



Approval List Prerequisites

Data that must be set up in GETA before you begin to create approval lists.

Employee Numbers

An identification number or code that uniquely identifies an employee. Each GETA user's employee number is entered into their GETA account. For more information, see *User IDs on page 17*.

User IDs

A code that uniquely identifies a GETA user. Each GETA user is assigned a user ID in their GETA account. For more information, see *User IDs on page 17*.

Roles

Define a set of screens that a user can be permitted to access so they can complete specific tasks. Each GETA approver must be assigned to one or more approval roles in their GETA account. For more information, see *User Roles on page 20*.

Alias IDs

A nickname for an assigned approver position. For example, the alias ID **OfficeMgr** might be used for the School Office Manager, regardless of the employee who is actually assigned to that position. User IDs are assigned to alias IDs. Also called a **user alias**. For more information, see *Alias IDs on page 30*.

Approval Lists

A list of employees, assigned by alias ID, that are assigned to approve GETA request. These employees are called **assigned approvers**. For more information, see *Approval Lists and Assigned Approvers on page 33*.

Approval List Assignments

Associates an approval list with an approval function. For example, up to three approval lists can be assigned to a worksite to approve leave, time entry, and overtime requests. For more information, see *Approval List Assignments on page 34*.

Approval Chains

A list of approvers that GETA assigns to a request for approval based on how approval lists are assigned to approval functions. For more information, see *Approval Chains on page 37*.

Approval Queues

A list of requests that GETA routes to a particular approver based on how approval lists are assigned to approval functions. For more information, see *Approval Queues on page 38*.

Approval Requests

A generic term for any information in GETA that needs to be approved. For example, leave requests, timesheets, and overtime requests.

Actual Approvers

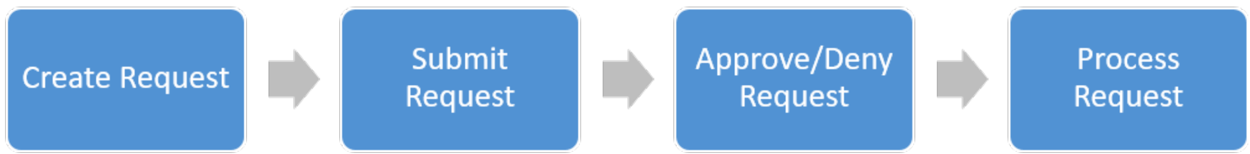
The employee who actually approved a leave request. This could be the assigned approver, an ad hoc approver, an alternate approver, or an employee with authorization to approve any leave request in the district. For more information, see *Actual Approvers (Assigned, Alternate, Ad-Hoc, District-Wide) on page 40*.

Leave Request Process

All leave requests entered into GETA go through a standard process.

After leave requests are approved, they are processed by the next payroll.

Figure 1-27. Leave Request Process



Create Request

A leave request for an employee is entered into GETA. Before the request is submitted for approval, it can be modified or deleted. Depending on the role assigned to their GETA user account, an employee can do the following:

General role

Enter and modify their own leave requests.

Admin role

Enter and modify leave requests for multiple employees in the district.

Leave Entry for Prior Pay Period role

Enter leave requests to be entered for prior, closed pay periods. Requests will be processed in the next pay period.

Payroll Negative Leave role

Enter negative hours on leave requests to create leave adjustments.

Payroll Negative Time Entry role

Enter leave and time adjustments.

Submit Request

When a leave request is complete, it is submitted for approval. Email notifications are sent to the employee on the leave request, **assigned approvers**, **ad hoc approvers**, and **alternate approvers**. Depending on the role assigned to their GETA user account, an employee can do the following:

General role

The employee can submit their own leave requests.

Admin role

The employee can submit leave requests for multiple employees in the district.

Approve/Deny Request

Leave requests must be approved before they are submitted for processing. Email notifications indicating that a leave request was approved or denied are sent to the employee on the leave request, assigned approvers, ad hoc approvers, and alternate approvers. Depending on the role assigned to their GETA user account, an employee can do the following:

Leave Approver role

The approver can approve or deny leave requests in their own approval queue.

Note

An **approval queue** is a set of requests that need to be approved by a particular user. Approvers are GETA users assigned to specific approval roles and the approval queue is built using one or more approval lists, which define the approvers for certain types of requests.

Leave Approver Extended role

The approver can approve or deny leave requests for anyone in the district.

For both leave approver roles, **alternate approvers** can approve leave requests if the primary approver is not available. In addition, a one-time only **ad hoc** approver can be assigned to approve leave requests as needed.

Process Request

After a leave request is approved, it is processed by the next payroll. Leave amounts are updated and can be viewed in GETA.

Note

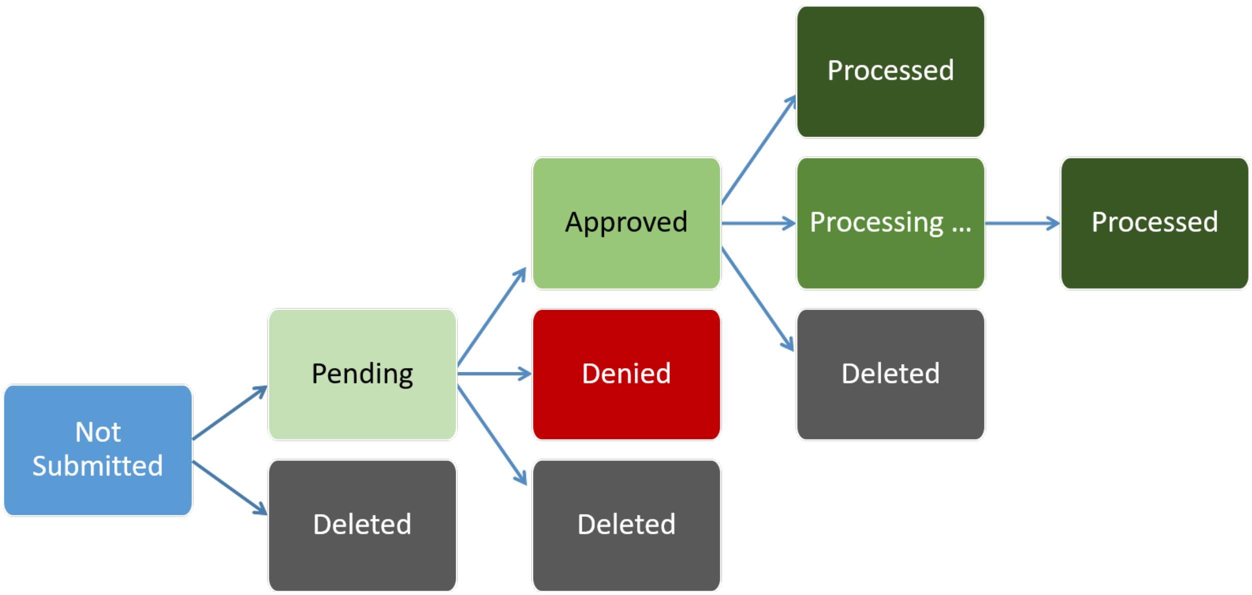
Leave requests for terminated employees are processed up to their termination date.

Leave Request Status

At each point during the leave request process, a status is assigned to the request.

This status identifies the current state of the leave request. The following figure shows how the status of a leave request changes as the request travels through its life cycle.

Figure 1-28. Leave Request Statuses



The following chart identifies the activities that can take place during each leave request status.

Figure 1-29. Leave Request Activities Per Status

	Not Submitted	Pending	Denied	Approved	Processing...	Processed	Deleted
Employee on leave request receives email notifications	✗	✓	✓	✓	✗	✗	✗
Leave request can be modified	✓	✓	✓	✓	✓*	✗	✗
Modified leave request can be resubmitted for approval	✓	✓	✓	✓	✓*	✗	✗
Leave request can be deleted	✓	✓	✓	✓	✓*	✗	✗
Assigned/ad hoc approver receives email notifications**	✗	✓	✓	✓	✗	✗	✗
Alternate approver receives email notifications	✗	✓	✓	✓	✗	✗	✗
District-wide approver does not receive email notifications	✗	✗	✗	✗	✗	✗	✗

*Unprocessed dates for multiple pay periods only
**Ad hoc approver receives first email as soon as they are added to a leave request.

Not Submitted

A new leave request has been created, but it has not been submitted for approval. The leave request can be modified or deleted.

Pending

The leave request has been submitted for approval. The employee on the leave request, **assigned approvers**, **ad hoc approvers**, and **alternate approvers** receive an email indicating that the leave request is pending approval. One or more approvers may have approved or denied the request, but it is not yet completely approved. The leave request can be modified in this status, but it must be resubmitted for approval. If the requested leave dates span multiple pay periods, then only the dates that have not been processed by Payroll can be modified.

Approved

The leave request has been completely approved and will be processed in the next Payroll. The employee on the leave request, assigned/ad hoc approvers, and alternate approvers receive an email indicating that the leave request has been approved. Leave requests can be modified in this status, but they must be resubmitted for approval. If the requested leave dates span multiple pay periods, then only the dates that have not been processed by Payroll can be modified.

Denied

The leave request has been denied. The employee on the leave request, assigned/ad hoc approvers, and alternate approvers receive an email indicating that the leave request has been denied. Leave requests can be modified in this status, but they must be resubmitted for approval. If the requested leave dates span multiple pay periods, then only the dates that have not been processed by Payroll can be modified.

Deleted

The leave request has been deleted. Deleted leave requests can be viewed but not modified or resubmitted.

Processing...

The leave request has been partially processed because the leave dates span across multiple pay periods. Some of these dates have been processed by Payroll and others have not yet been processed. Processed dates cannot be modified but unprocessed dates can be. You cannot modify the hours of unprocessed leave dates.

Processed

The leave request has been processed by Payroll. Updated **leave balances** and **leave-activity** can be viewed in GETA.

Adding a User Account

Learn how to add and maintain GETA user accounts.

About this task

A **user account** is an identity set up in GETA to define login credentials, user authorizations, and email addresses. **Login credentials** are the user ID and password an employee needs to log in to GETA. **User authorizations** give a user permission to access specific functions by identifying their functional role and controlling which screens they can access. An **email address** is defined for each user account so the user can receive various notifications generated by GETA.

Objective: You will be able to use the use the Modify User Accounts screen to add and maintain GETA user accounts.

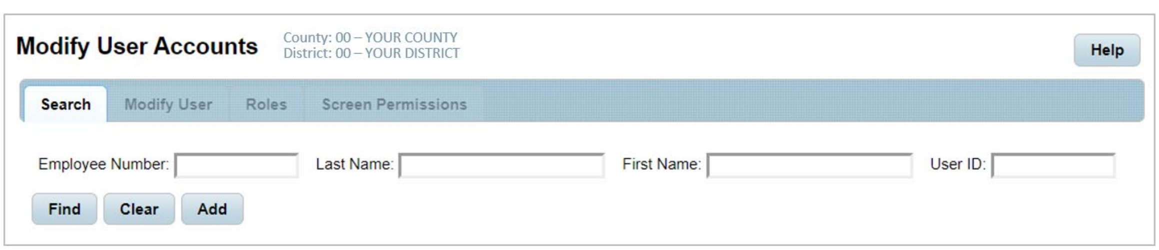
Before you begin

- Learn more about login credentials and user authorization (see *User Accounts on page 14*).
- Learn about the purpose of roles and screen permissions you can assign to a user account (see *User Roles on page 20* and *Screen Permissions on page 24*).
- Create screen permission templates as needed (see *Adding a Screen Permission Template on page 72*).
- Review the descriptions of fields on this screen (see *Modify User Accounts Screen on page 386*).

Steps

1. Open the Modify User Accounts screen.

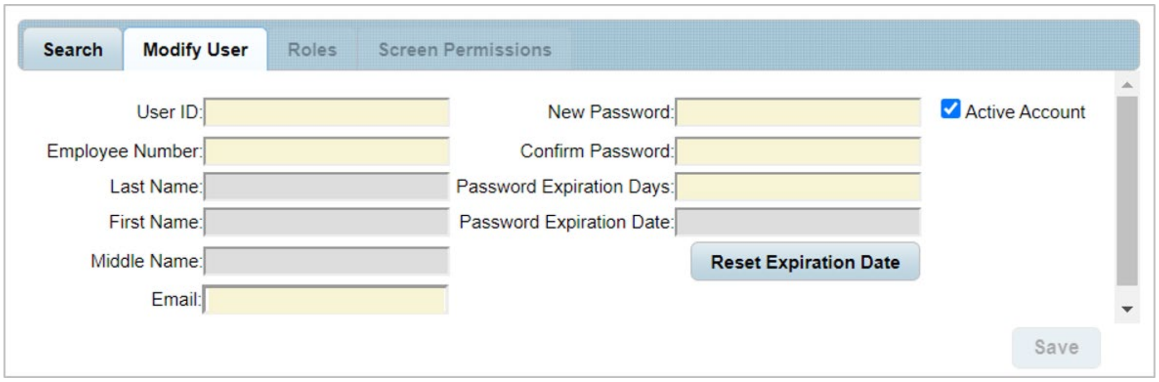
   System Configuration → User Security → Modify User Accounts

   For detailed descriptions of the fields on this tab, see *Search Tab on page 387*.

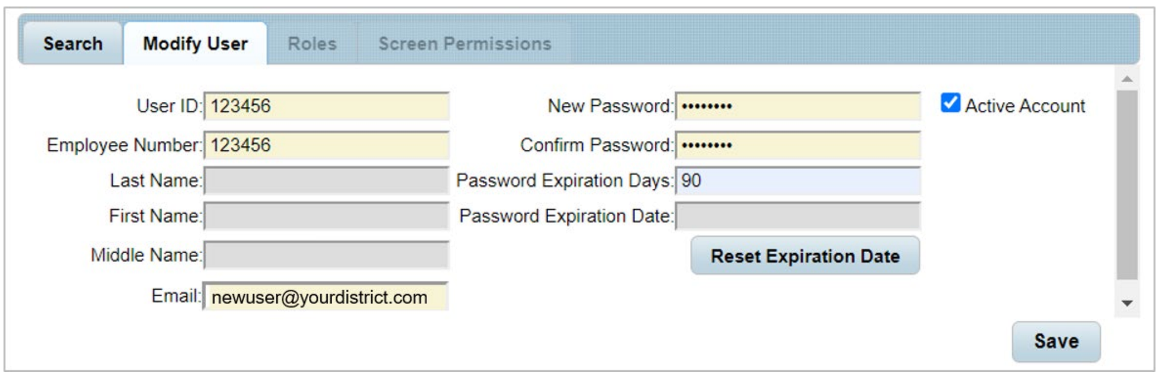
2. On the Search tab, click **Add**.

   The Modify User tab opens.



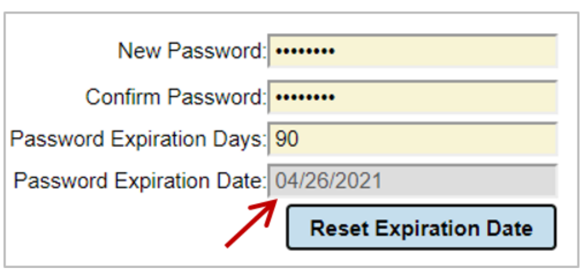
   For detailed descriptions of the fields on this tab, see *Modify User Tab on page 388*.

3. Enter the new user's login credential information.



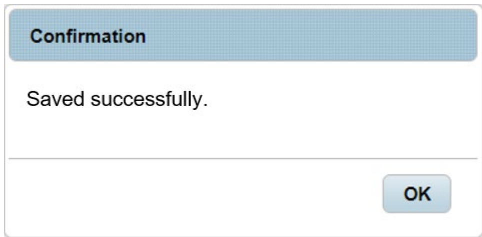
4. Click **Reset Expiration Date**.

   The Password Expiration Date field displays the date that is the number of days from today that you entered into the **Password Expiration Days** field.



5. Click **Save**.

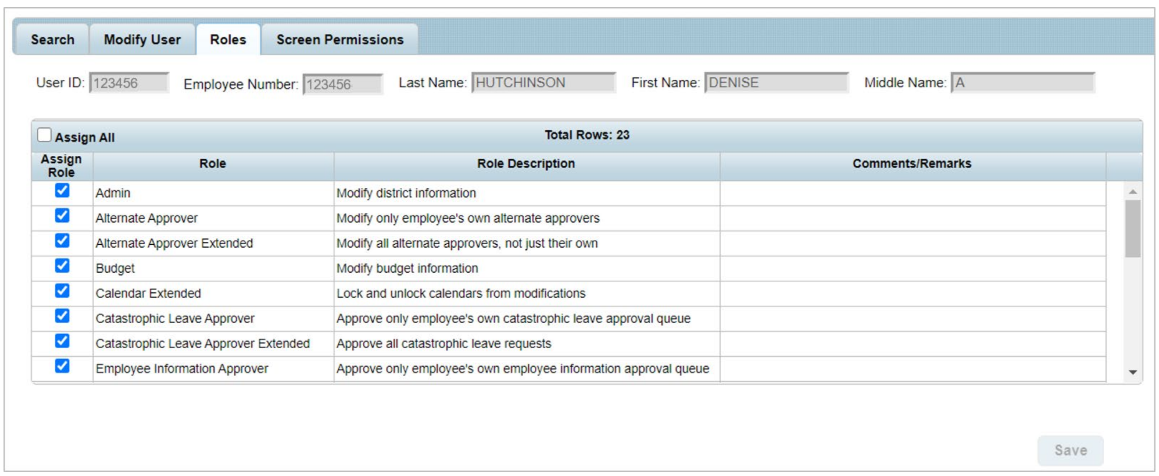
   A confirmation message appears.



   Click **OK** to close the message.

6. Click the Roles tab.

   The Roles tab opens.



   By default, all roles are selected for a new user.

   For detailed descriptions of the fields on this tab, see *Modify User Tab on page 388*.

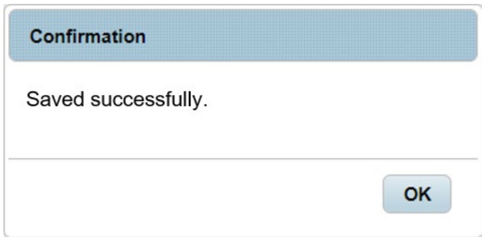
7. Uncheck any roles that should not be assigned to the user.

   Tip

   To select individual roles, check the **Assign All** check box, and then uncheck it. All boxes are now unchecked so you can select roles individually.

8. Click **Save**.

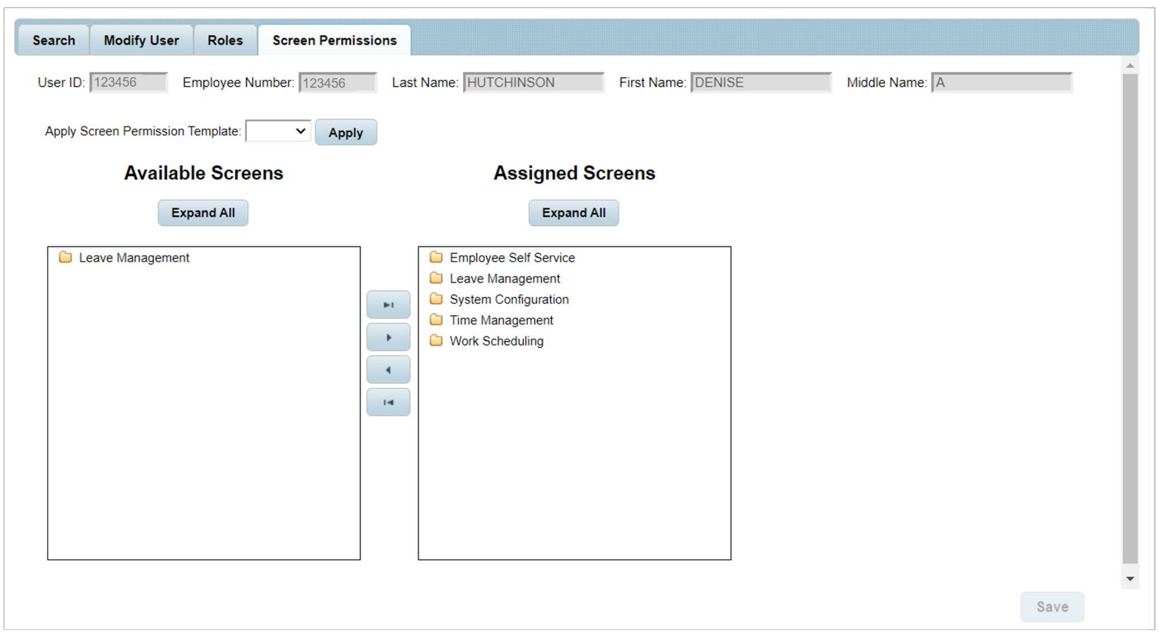
   A confirmation message appears.



   Click **OK** to close the message.

9. Click the Screen Permissions tab.

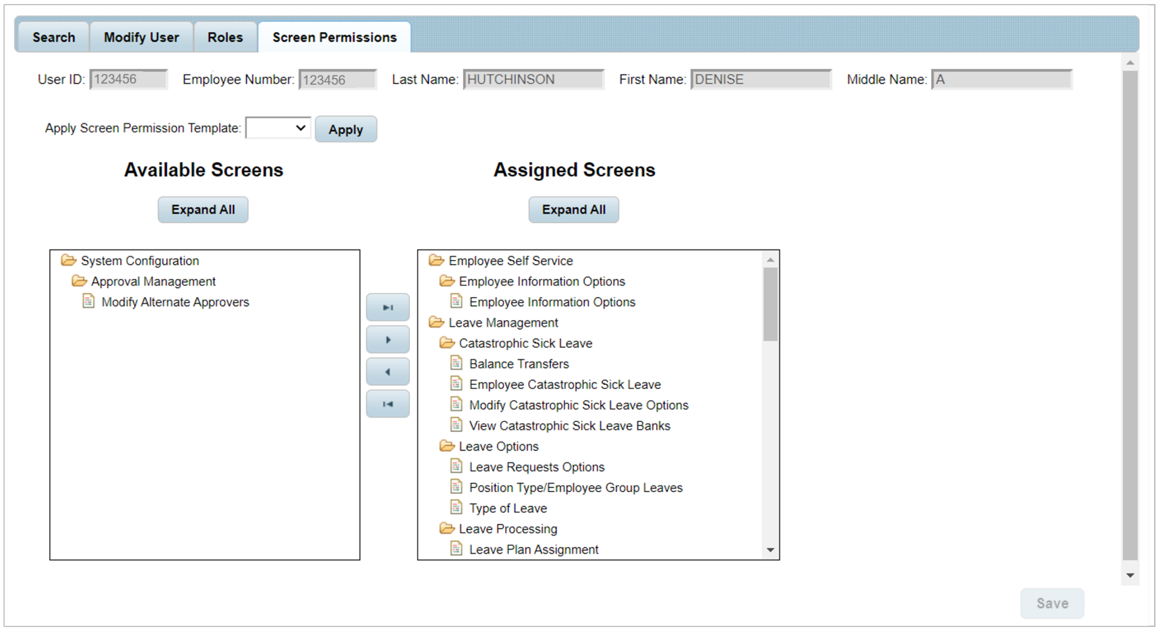
   The Screen Permissions tab opens.



   For detailed descriptions of the fields on this tab, see *Screen Permissions Tab on page 391*.

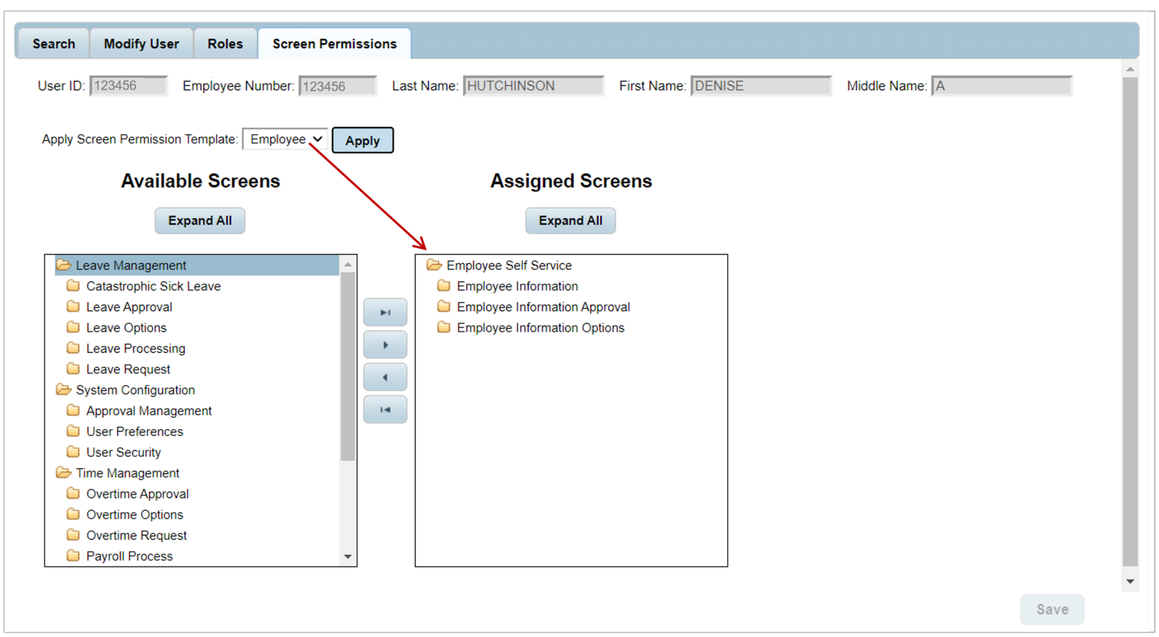
10. Click the **Expand All** button in both the Available Screens and Assigned Screens lists.

    The lists expand, allowing you to view the screens that may already be assigned to the user account.



11. To apply a screen permission template, select a template name from the **Screen Permissions Template** field.

    For example, select the template named Employees to move the set of pre-defined screens for employees to the Assigned Screens list.

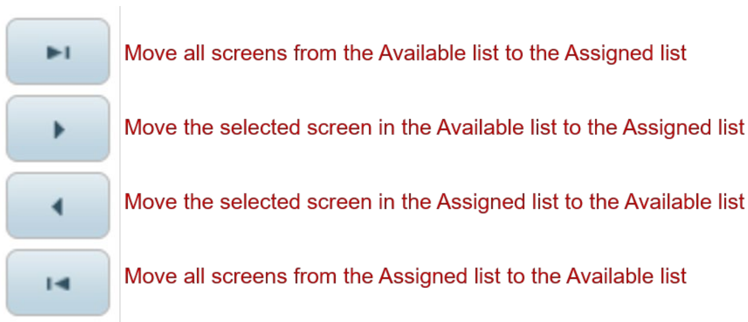


Note

- You can apply more than one screen permission template to the Assigned Screens list.
- Applying a template does not overwrite screens already in the Assigned Screens list. It just adds to them.

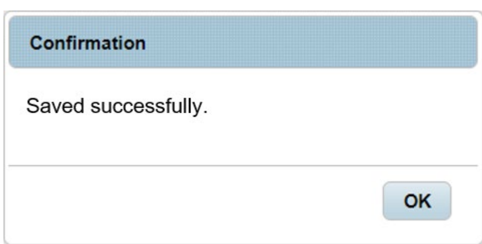
12. Add and remove screens from the **Assigned Screens** as needed.

    Use the buttons shown below to move folders, screens, and subfolders to and from the Available and Assigned lists.



13. Click **Save**.

    A confirmation message appears.



Click **OK** to close the message.

Results

You learned how to use the Modify User Accounts screen to add and maintain GETA user accounts.

What to do next

You may need to periodically update user accounts. Do any of the following as needed.

- Change the email address entered on a user's account (see *Changing a User's Email Address on page 84*).
- Change the password assigned to a user account (see *Resetting a User's Password on page 86*).
- Modify roles for a user (see *Updating Roles on page 88*).
- Add or delete access to a screen for a user account (see *Updating Screen Permissions on page 91*).
- Activate or deactivate a user account (see *Activating/Deactivating a User Account on page 95*).

Setting Up Leave Request Forms

Learn how to set up Leave Request form options.

About this task

The **Leave Request form** is a set of fields on GETA screens that are filled out to request time off from work. This form is used to enter, modify, and view leave requests. **Leave request form options** define how the Leave Request form will appear at your district.

Objective: You will be able to use the Modify Leave Request Options screen to set up Leave Request form options.

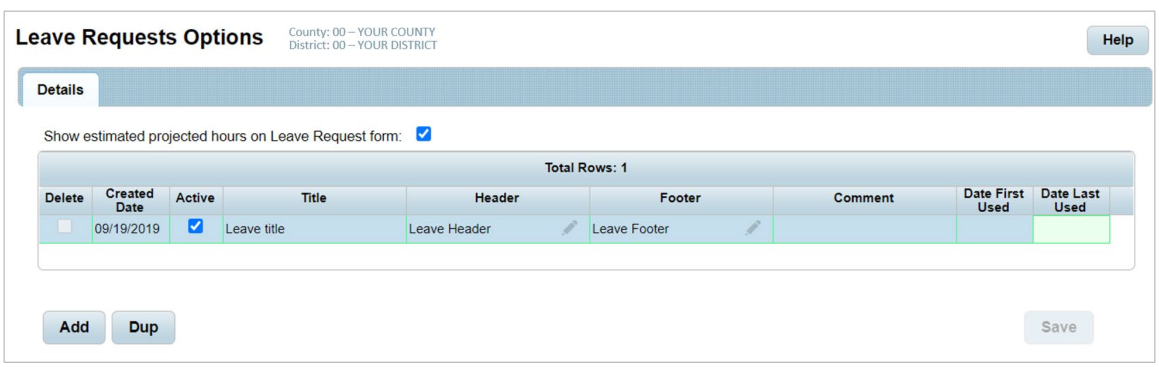
Before you begin

- Learn more about leave requests (see *Leave Requests and Adjustments on page 59*).
- Review the descriptions of fields on this screen (see *Leave Requests Options Screen on page 329*).

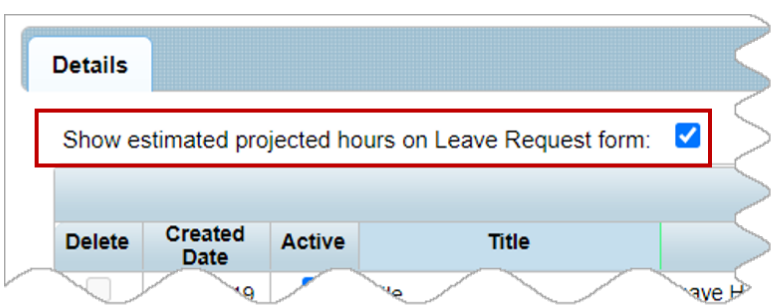
Steps

1. Open the Leave Request Options screen.

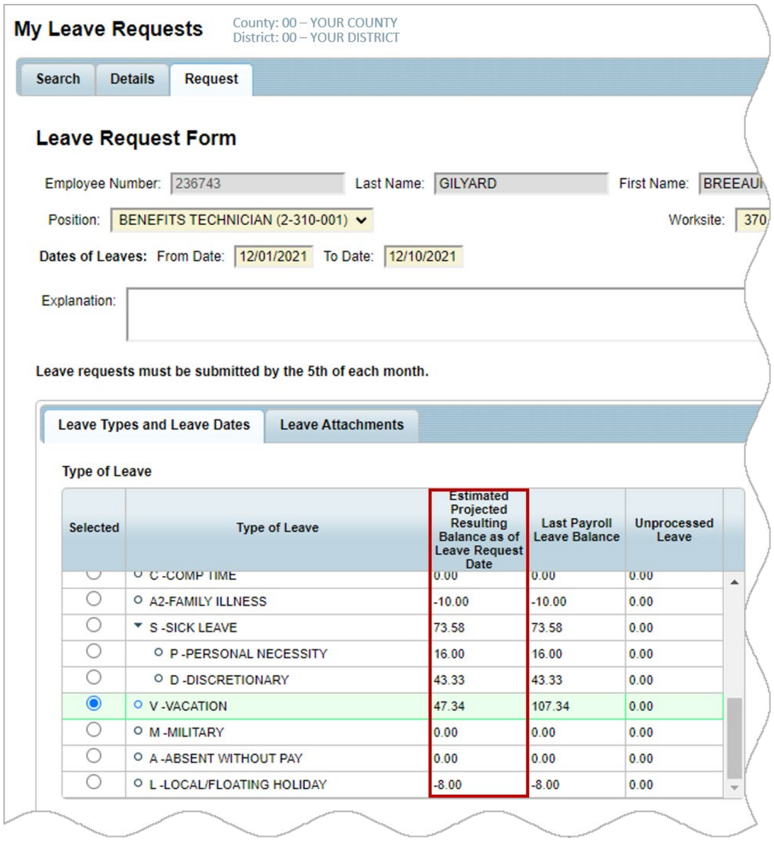
   Leave Management → Leave Options → Leave Requests Options



2. At the top of the Details tab, indicate if you want show estimated projected hours on the Leave Request form for your district.



- *If this box is checked*, projected employee leave hours appear in the **Estimated Projected Resulting Balance as of Leave Request Date** column on the My Leave Requests and Employee Leave Requests screens. If an employee is assigned to plan that accrues leave, then the estimated amount of leave earned by the Date of Leave on the request will be included.



- *If this box is not checked*, the **Estimated Projected Resulting Balance as of Leave Request Date** column does not appear on the My Leave Requests and Employee Leave Requests screens.

3. Click **Add** or **Dup**.

    - If you click **Add**, a blank row opens. Enter Leave Request Form options on this new row.

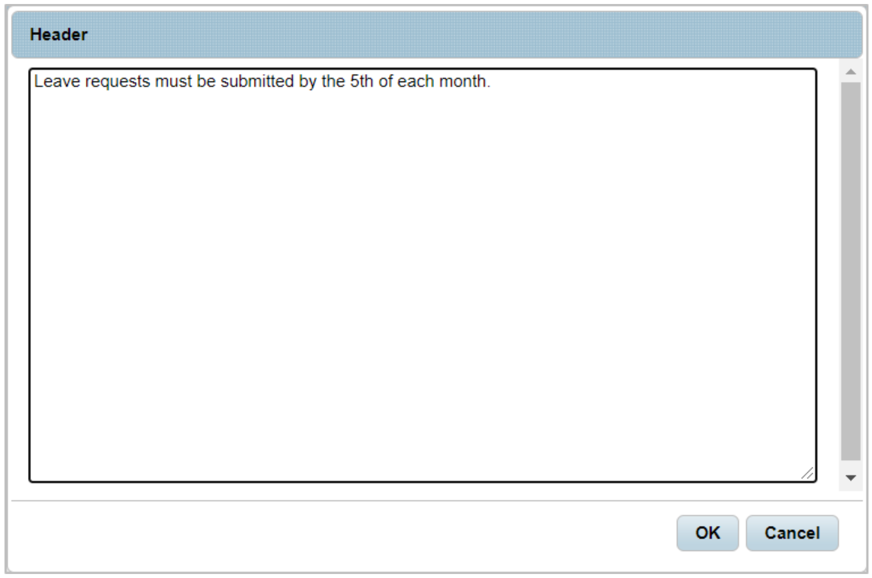
    - If you click **Dup**, the currently selected row is duplicated. Modify the values in any open field.

Each row represents one set of Leave Request form options.

For detailed descriptions of the fields on this tab, see *Details Tab on page 330*.

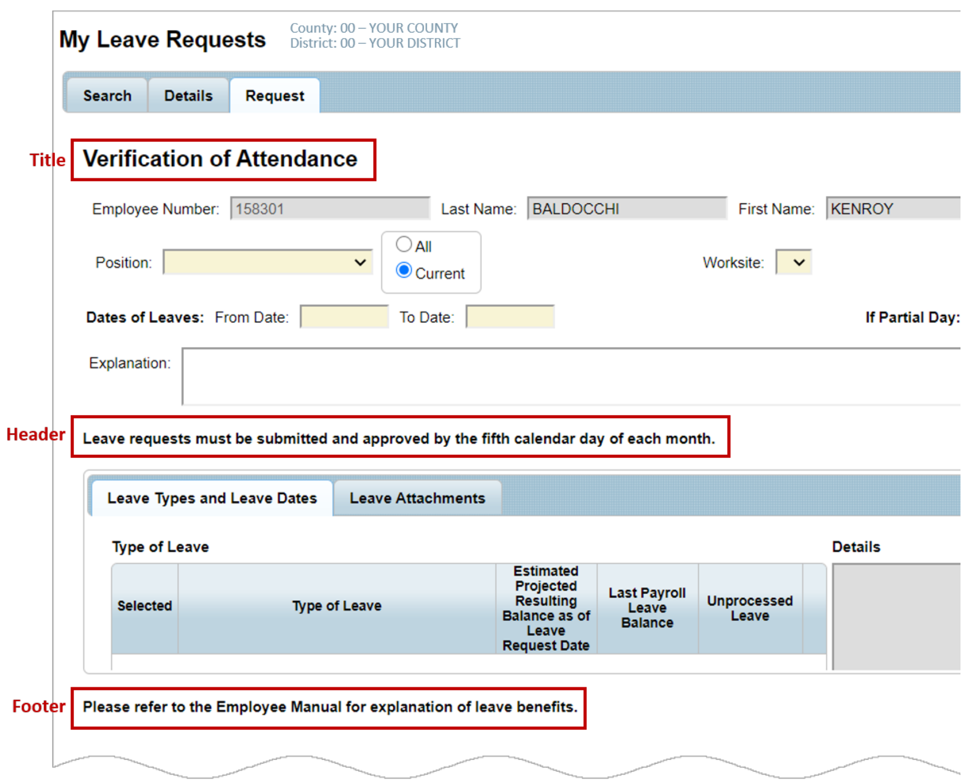
Tip

- Click the **Pencil** icon in the **Header** or **Footer** field to open a popup for entering text into these fields.



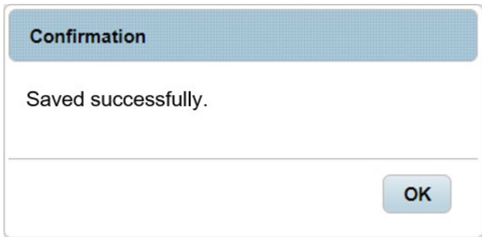
Enter text, and then click **OK** to close the popup.

- The text you enter for the Title, Header, and Footer appears on Leave Request forms as shown below.



4. Click **Save**.

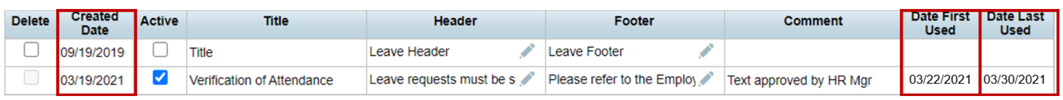
   A confirmation message appears.



   Click **OK** to close the message.

Note

- After a new row of options is saved, the saved date appears in the **Created Date** field.
- The **Date First Used** field is automatically filled in with the date the options were first used on a Leave Request form.
- The **Date Last Used** field is automatically filled in with the date the options were last used on a Leave Request form.



Delete	Created Date	Active	Title	Header	Footer	Comment	Date First Used	Date Last Used
☐	09/19/2019	☐	Title	Leave Header	Leave Footer			
☐	03/19/2021	☑	Verification of Attendance	Leave requests must be s	Please refer to the Emplo	Text approved by HR Mgr	03/22/2021	03/30/2021

Results

You learned how to use the Modify Leave Request Options screen to set up Leave Request form options.

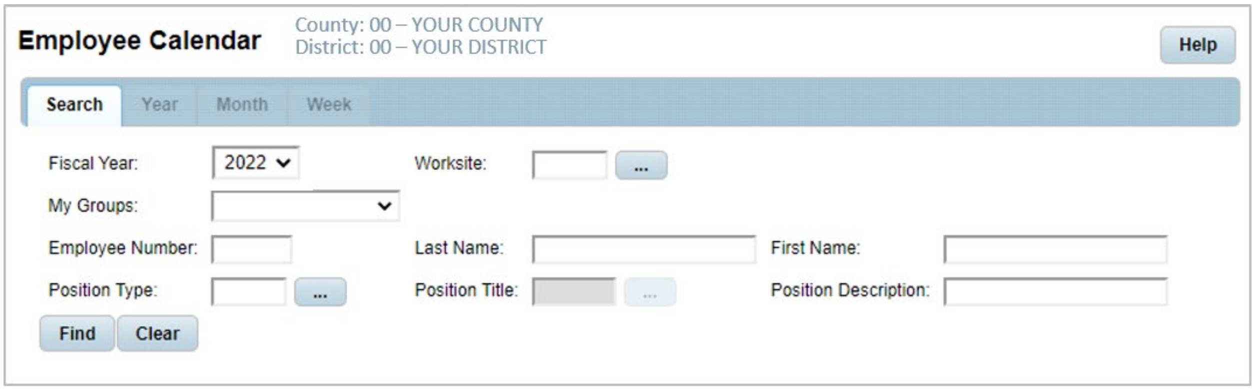
Maintenance Tips

To maintain a row of options, do any of the following and then click **Save**:

- *To modify a row,* change the value of any open field on the row. Existing Leave Request form options cannot be modified if they have been used.
- *To activate a row of options*, check the **Active** box. One set of options is required and you cannot have more than one active set.
- *To deactivate a row of options*, uncheck the **Active** box.
- *To delete a row of options,* uncheck the **Active** box and then check the **Delete** box. You can only delete leave request options that are not active and have not been used.

Employee Calendar Screen

Use the Employee Calendar screen to create and maintain position calendars and work schedules. A **position calendar** is a created for a position assigned to a specific worksite, which is called a **position worksite**. An employee can have multiple position calendars, one for each position worksite. For example, a grounds crew member might work at three different schools, each with a different work schedule. So, three different position calendars can be created for this employee. Work schedules can be defined for position calendars. For employees with multiple positions, you can view one or more position calendars at the same time.



The Employee Calendar screen consists of four tabs that are used to create and maintain position calendars and work schedules.

- Use the Search tab to find an employee's position calendar(s).
- Use the Year tab to work with position calendars for the entire fiscal year.
- Use the Month tab to work with position calendars using a monthly calendar format.
- Use the Week tab to work with position calendars using a weekly calendar format.

Note

- For more information about employee calendars, see *Calendars and Work Schedules on page 42* and *Position Worksites on page 45*.
- For instructions on using this screen, see *Setting Up Position Calendars and Work Schedules on page 186*.

Search Tab

Use the Search tab to find an employee's position calendar(s).

Fields

Use the fields on this tab to enter the search values needed to find an employee's position calendar(s).

Fiscal Year
The fiscal year of the position calendar to find.

Worksite
The 3-digit code that identifies the worksite.

My Groups
The name of the group of employees to limit the search to. For example, if you created a group that includes just Bus Drivers, enter the name of the group to limit the search to employees you added to the group. Groups are defined on the My Groups screen in the System Configuration module.

Employee Number
The identification number of the employee.

Last Name
The last name of the employee to create the report for.

First Name
The first name of the employee to create the report for.

Position Type
The 1-digit number that identifies a position category (**1** - Certificated employees, **2** - Classified employees, **3** - Students, or **4** - Board members).

Position Title
The 3-digit number that identifies the employee's position title.

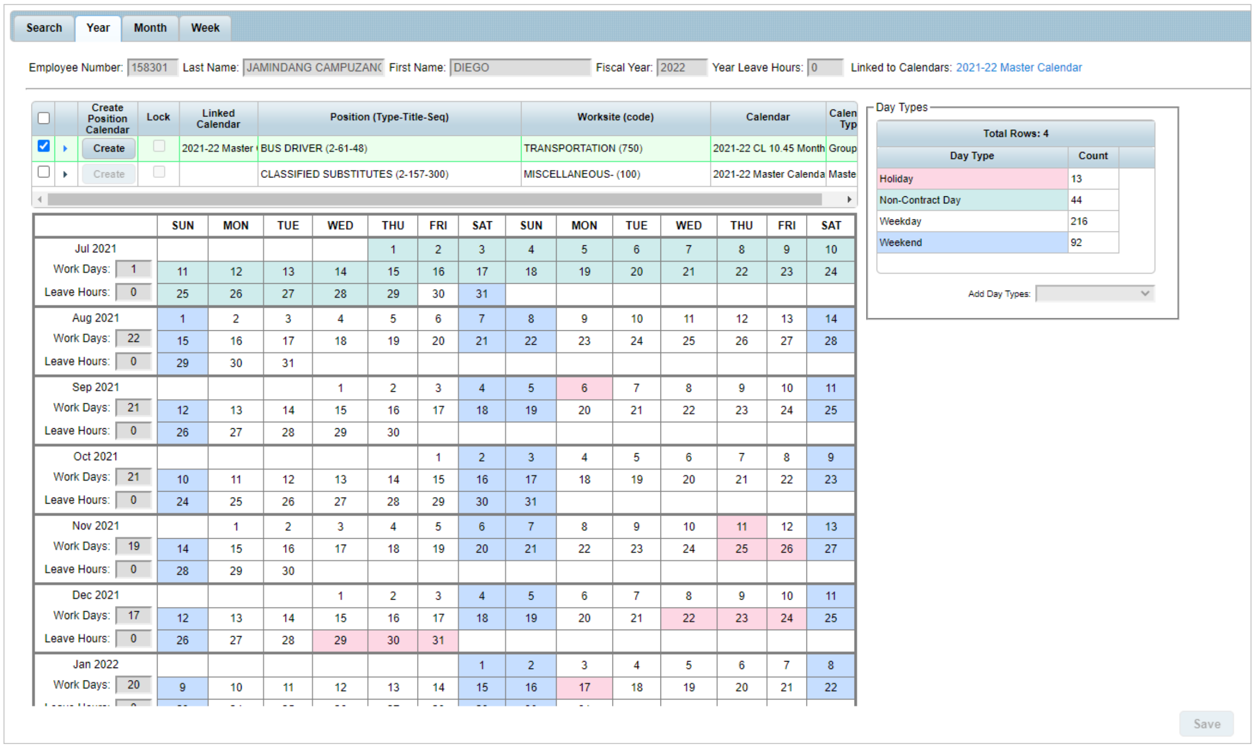
Position Description
The description of the employee's position.

Buttons

Button	Description
Find	Finds information using the search values you entered.
Clear	Clears search values previously entered.

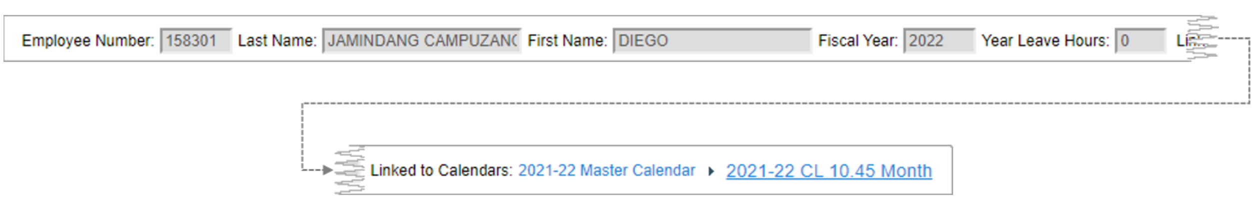
Year Tab

Use the Year tab to work with position calendars for the entire fiscal year. Using this tab, you can view day types and work schedules for a fiscal year for one or more position calendars for an employee.



Fields

The fields at the top of the tab display information about an employee's position calendar found using values entered on the Search tab.



Employee Number

The employee identification number.

Last Name

The last name of the employee to create the report for.

First Name

The first name of the employee to create the report for.

Fiscal Year

The fiscal year of the position calendar(s).

Year Leave Hours

The total number of leave hours requested by the employee for the calendar year.

Linked to Calendars

The name of the calendar that the currently displayed calendar is linked to. If more than one calendar name appears in this field, separated by arrows, then the position calendar is linked to the calendar shown to the right of the arrow which, in turn, is linked to the calendar shown to the left of the arrow. If the employee has multiple calendars, the calendar name(s) shown in this field reflect the positions selected using the currently selected position calendar. If this field does not appear, then the employee calendar is either not linked to any calendar or multiple position calendars are selected to display at the same time.

The rows and columns in the body of the tab above the calendar display information related to the employee's position and position calendar.

☐		Create Position Calendar	Lock	Linked Calendar	Position (Type-Title-Seq)	Worksite (code)	Calendar	Calendar Type
☑	▸	Create	☐		CLASSIFIED SUBSTITUTES (2-157-300)	MISCELLANEOUS- (100)	2021-22 Master Calenda	Master
☐	▸	Create	☐	2021-22 CL 10.4	BUS DRIVER (2-61-48)	TRANSPORTATION (750)	Position-2-61-48-750	Position

Unlabeled Check Box

Enables the **Create** button for creating a position calendar. Also, for employees with multiple positions, controls which position calendar is displayed. If checked, the position calendar on the same row displays in the body of the tab. If more than one row is checked, then position calendars associated with each checked row are displayed together in the body of the tab.

Create Position Calendar

Click the **Create** button in this column to create a position calendar for the corresponding position. The position calendar can be viewed on the Employee Calendar screen.

Lock

If checked, the position calendar is locked. Day types and work schedules may not be changed on locked calendars but the calendar can still be linked/unlinked from master and group calendars. Only users who are assigned to the **Calendar Extended** role can check or uncheck this box.

Linked Calendar

The name of the parent calendar the position calendar is linked to. For example, if **Calendar 1** appears in this column and **Calendar 2** appears in the **Calendar** column, then Calendar 2 (child) is linked to Calendar 1 (parent). If this field is blank, then the position calendar is not linked to another calendar.

Position (Type-Title-Seg)

The name and Type-Title-Sequence (TTS) code of the position the employee is assigned to.

Worksite (code)

The name and 3-digit code of the employee's worksite for each listed position.

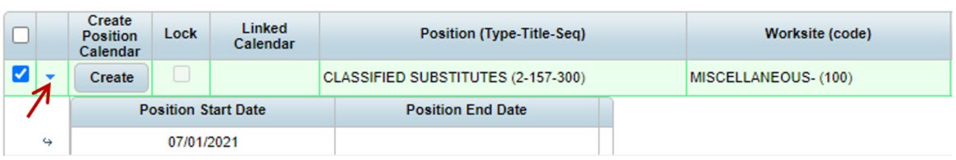
Calendar

The name of the calendar that can be viewed on this tab. The calendar appears in the body of the tab when the unlabeled box on the left side of the row is checked. If more than one row is checked, then calendars for all checked rows appear, superimposed onto each other.

Calendar Type

The type of calendar identified in the **Calendar** column (**Master**, **Group**, or **Position**).

Expanded rows display a history of position start and end dates.



Position Start Date

The starting date of the position.

Position End Date

The ending date of the position.

The calendar that appears in the body of the tab displays all day types for the year. If calendars for more than one position are displayed, they overlap each other. Days with multiple day types appear as gradients (multiple colors that fade into each other).

	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT
Jul 2021					1	2	3	4	5	6	7	8	9	10
Work Days: 1	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Leave Hours: 0	25	26	27	28	29	30	31							
Aug 2021	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Work Days: 0	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Leave Hours: 0	29	30	31											
Sep 2021				1	2	3	4	5	6	7	8	9	10	11
Work Days: 21	12	13	14	15	16	17	18	19	20	21	22	23	24	25
Leave Hours: 0	26	27	28	29	30									
Oct 2021						1	2	3	4	5	6	7	8	9
Work Days: 21	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Leave Hours: 0	24	25	26	27	28	29	30	31						
Nov 2021		1	2	3	4	5	6	7	8	9	10	11	12	13
Work Days: 19	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Leave Hours: 0	28	29	30											
Dec 2021				1	2	3	4	5	6	7	8	9	10	11
Work Days: 17	12	13	14	15	16	17	18	19	20	21	22	23	24	25
Leave Hours: 0	26	27	28	29	30	31								
Jan 2022							1	2	3	4	5	6	7	8
Work Days: 20	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Leave Hours: 0	23	24	25	26	27	28	29	30	31					

The Day Types area of the tab is used to select and maintain day types that can be used on the position calendar. If a position calendar has not been created, this area is display-only.

Day Types

Total Rows: 3

Day Type	Count
Holiday	19
Weekday	247
Weekend	104

Add Day Types:

Day Type

The day type that can be assigned to a day on a position calendar.

Count

The number of days on the calendar assigned to a day type. If the employee has multiple positions and more than one calendar is selected, these values reflect the largest count per day type. For example, if one calendar has 75 non-contract days and another selected calendar has 44 non-contract days, then this count will display 75 non-contract days.

Add Day Types

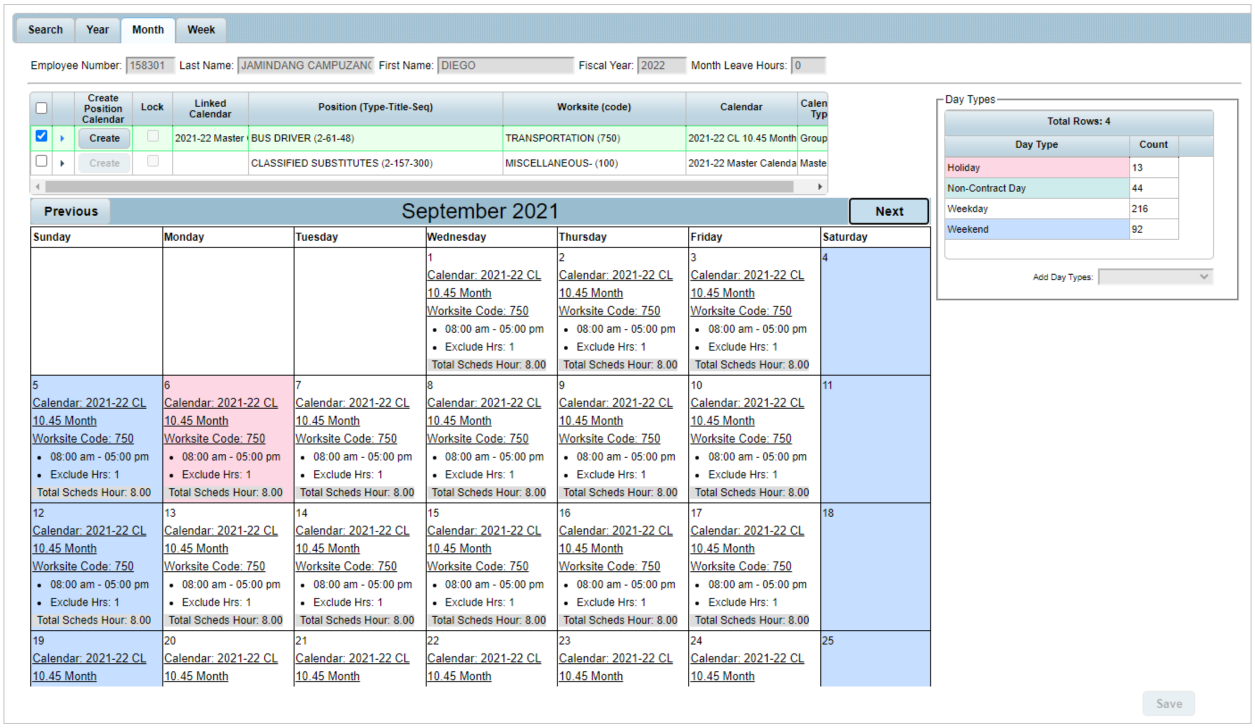
Additional day types that can are available to select on the calendar.

Buttons

Button	Description
Create	Creates a position calendar.
Work Schedule	Opens the Employee Work Schedule popup for setting up a work schedule for the currently displayed position calendar. This button only appears if a calendar has been created for the position.
Save	Validates, and then saves new and/or modified information on the tab.
Delete	Deletes the currently displayed position calendar.

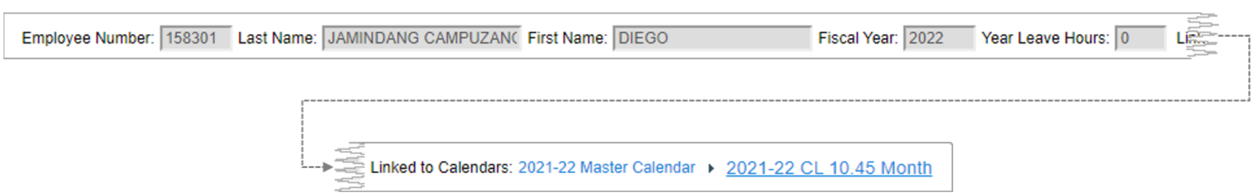
Month Tab

Use the Month tab to work with position calendars using a monthly calendar format. Using this tab, you can view days types and the employee's work schedule for a specific month.



Fields

The fields at the top of the tab display information about the position calendar found using values entered on the Search tab.



Employee Number

The employee identification number.

Last Name

The last name of the employee to create the report for.

First Name

The first name of the employee to create the report for.

Fiscal Year

The fiscal year of the position calendar(s).

Year Leave Hours

The total number of leave hours requested by the employee for the calendar year.

Linked to Calendars

The name of the calendar that the currently displayed calendar is linked to. If more than one calendar name appears in this field, separated by arrows, then the position calendar is linked to the calendar shown to the right of the arrow which, in turn, is linked to the calendar shown to the left of the arrow. If the employee has multiple calendars, the calendar name(s) shown in this field reflect the positions selected using the currently selected position calendar. If this field does not appear, then the employee calendar is either not linked to any calendar or multiple position calendars are selected to display at the same time.

The rows and columns in the body of the tab above the calendar display information related to the employee's position.

		Create Position Calendar	Lock	Linked Calendar	Position (Type-Title-Seq)	Worksite (code)	Calendar	Calendar Type
		Create			CLASSIFIED SUBSTITUTES (2-157-300)	MISCELLANEOUS- (100)	2021-22 Master Calenda	Master
		Create		2021-22 CL 10.4	BUS DRIVER (2-61-48)	TRANSPORTATION (750)	Position-2-61-48-750	Position

Unlabeled Check Box

Enables the **Create** button for creating a position calendar. Also, for employees with multiple positions, controls which position calendar is displayed. If checked, the position calendar on the same row displays in the body of the tab. If more than one row is checked, then position calendars associated with each checked row are displayed together in the body of the tab.

Create Position Calendar

Click the **Create** button in this column to create a position calendar for the corresponding position. The position calendar can be viewed on the Employee Calendar screen.

Lock

If checked, the position calendar is locked. Day types and work schedules may not be changed on locked calendars but the calendar can still be linked/unlinked from master and group calendars. Only users who are assigned to the **Calendar Extended** role can check or uncheck this box.

Linked Calendar

The name of the calendar that named in the corresponding **Calendar** column is linked to. For example, if **Calendar 1** appears in this column and **Calendar 2** appears in the **Calendar** column, then Calendar 2 (child) is linked to Calendar 1 (parent).

Position (Type-Title-Seg)

The name and Type-Title-Sequence (TTS) code of the position the employee is assigned to.

Worksite (code)

The name and 3-digit code of the employee's worksite for each listed position.

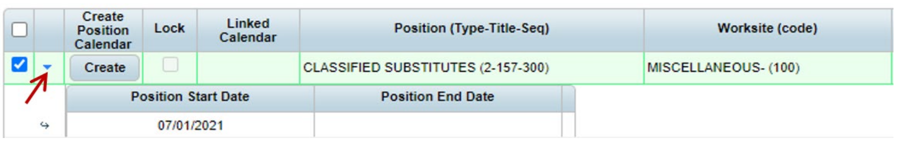
Calendar

The name of the calendar that can be viewed on this tab. The calendar appears in the body of the tab when the unlabeled box on the left side of the row is checked. If more than one row is checked, then calendars for all checked rows appear, superimposed onto each other.

Calendar Type

The type of calendar identified in the **Calendar** column (**Master**, **Group**, or **Position**).

Expanded rows display a history of position start and end dates.



		Create Position Calendar	Lock	Linked Calendar	Position (Type-Title-Seq)	Worksite (code)
		Create			CLASSIFIED SUBSTITUTES (2-157-300)	MISCELLANEOUS- (100)

Position Start Date	Position End Date
07/01/2021	

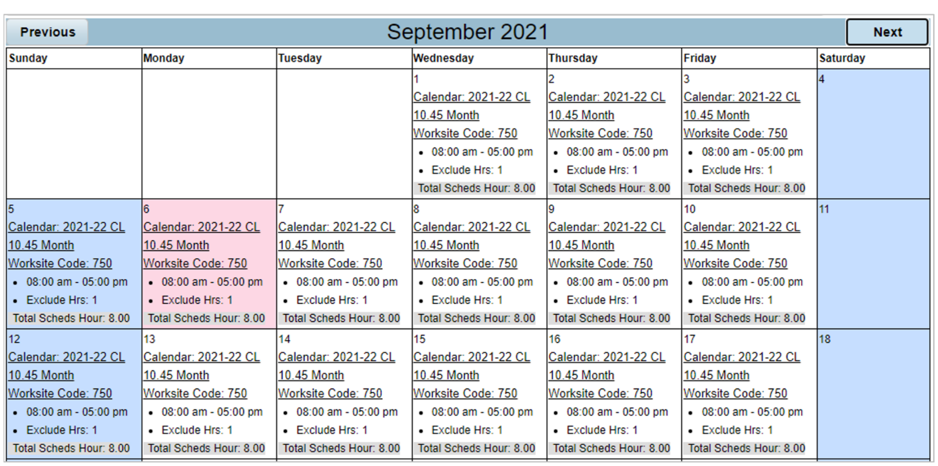
Position Start Date

The starting date of the position.

Position End Date

The ending date of the position.

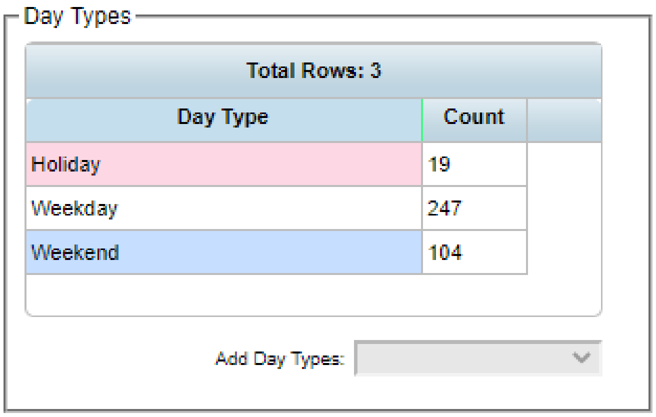
The calendar that appears in the body of the tab displays day types and the employee's work schedule for a month. If calendars for more than one position are displayed, they overlap each other and display both work schedules (if defined). Days with different day types will appear as gradients (multiple colors that fade into each other). If work schedules are not defined for an employee's position calendar(s), then the calendar is blank.



Previous September 2021 Next

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	2 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	3 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	4
5 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	6 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	7 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	8 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	9 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	10 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	11
12 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	13 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	14 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	15 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	16 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	17 Calendar: 2021-22 CL 10.45 Month Worksite Code: 750 • 08:00 am - 05:00 pm • Exclude Hrs: 1 Total Scheds Hour: 8.00	18

The Day Types area of the tab to select and maintain day types that can be used on the calendar, if a position calendar has been created for the employee. If a position calendar has not been created, this area is display-only.



Day Type

The day type that can be assigned to a day on a position calendar.

Count

The number of days on the calendar assigned to a day type. If the employee has multiple positions and more than one calendar is selected, these values reflect the largest count per day type. For example, if one calendar has 75 non-contract days and another selected calendar has 44 non-contract days, then this count will display 75 non-contract days.

Add Day Types

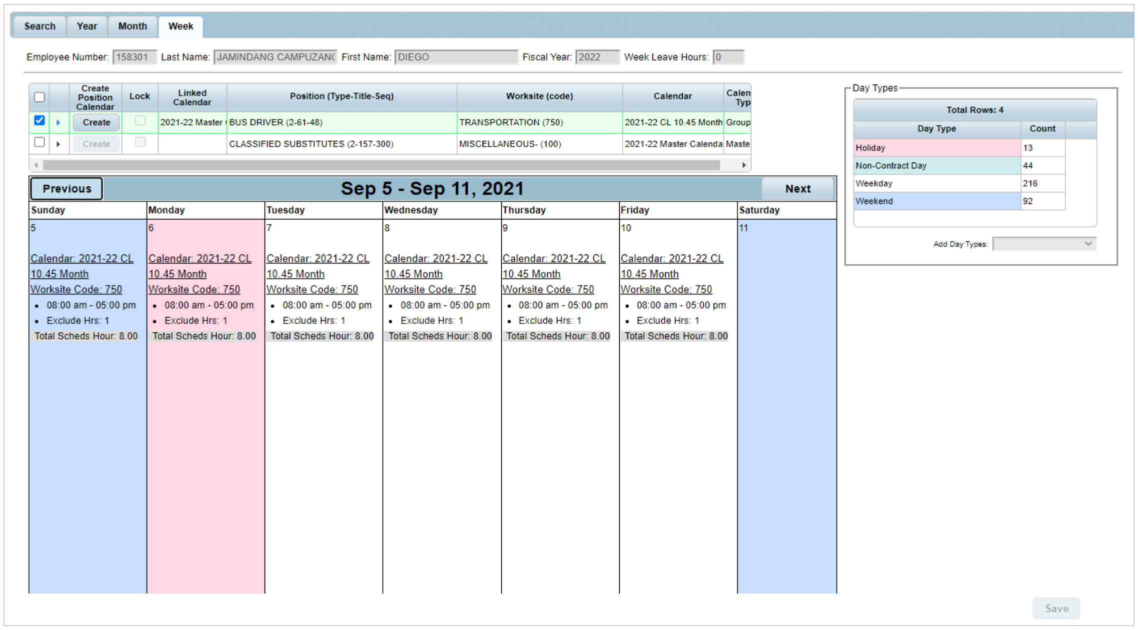
Additional day types that can are available to select on the calendar.

Buttons

Button	Description
Create	Creates a position calendar.
Work Schedule	Opens the Employee Work Schedule popup for setting up a work schedule for the currently displayed position calendar. This button only appears if a calendar has been created for the position.
Save	Validates, and then saves new and/or modified information on the tab.
Delete	Deletes the currently displayed position calendar.

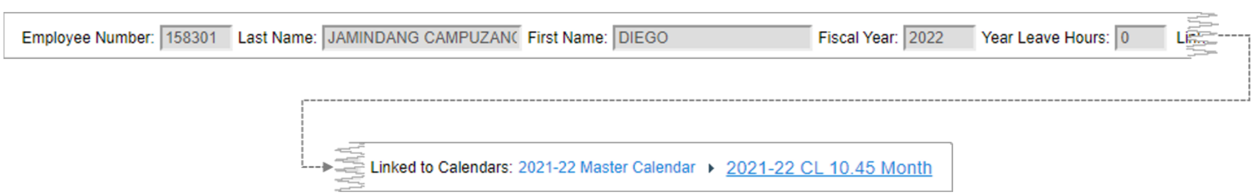
Week Tab

Use the Week tab to work with position calendars using a weekly calendar format. Using this tab, you can view day types and the employee's work schedule for a specific week.



Fields

The fields at the top of the tab display information about the position calendar found using values entered on the Search tab.



Employee Number
The employee identification number.

Last Name
The last name of the employee to create the report for.

First Name
The first name of the employee to create the report for.

Fiscal Year
The fiscal year of the position calendar(s).

Year Leave Hours
The total number of leave hours requested by the employee for the calendar year.

Linked to Calendars

The name of the calendar that the currently displayed calendar is linked to. If more than one calendar name appears in this field, separated by arrows, then the position calendar is linked to the calendar shown to the right of the arrow which, in turn, is linked to the calendar shown to the left of the arrow. If the employee has multiple calendars, the calendar name(s) shown in this field reflect the positions selected using the currently selected position calendar. If this field does not appear, then the employee calendar is either not linked to any calendar or multiple position calendars are selected to display at the same time.

The rows and columns above the calendar in the body of the tab display information related to the employee's position.

☐		Create Position Calendar	Lock	Linked Calendar	Position (Type-Title-Seq)	Worksite (code)	Calendar	Calendar Type
☑	▸	Create	☐		CLASSIFIED SUBSTITUTES (2-157-300)	MISCELLANEOUS- (100)	2021-22 Master Calenda	Master
☐	▸	Create	☐	2021-22 CL 10.4	BUS DRIVER (2-61-48)	TRANSPORTATION (750)	Position-2-61-48-750	Position

Unlabeled Check Box

Enables the **Create** button for creating a position calendar. Also, for employees with multiple positions, controls which position calendar is displayed. If checked, the position calendar on the same row displays in the body of the tab. If more than one row is checked, then position calendars associated with each checked row are displayed together in the body of the tab.

Create Position Calendar

Click the **Create** button in this column to create a position calendar for the corresponding position. The position calendar can be viewed on the Employee Calendar screen.

Lock

If checked, the position calendar is locked. Day types and work schedules may not be changed on locked calendars but the calendar can still be linked/unlinked from master and group calendars. Only users who are assigned to the **Calendar Extended** role can check or uncheck this box.

Linked Calendar

The name of the calendar that named in the corresponding **Calendar** column is linked to. For example, if **Calendar 1** appears in this column and **Calendar 2** appears in the **Calendar** column, then Calendar 2 (child) is linked to Calendar 1 (parent).

Position (Type-Title-Seg)

The name and Type-Title-Sequence (TTS) code of the position the employee is assigned to.

Worksite (code)

The name and 3-digit code of the employee's worksite for each listed position.

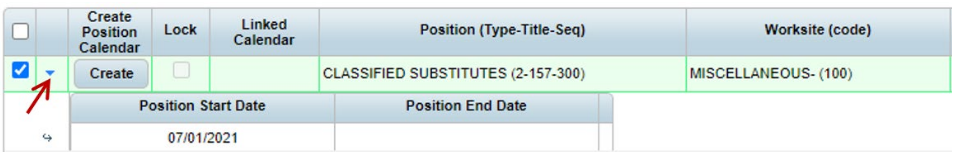
Calendar

The name of the calendar that can be viewed on this tab. The calendar appears in the body of the tab when the unlabeled box on the left side of the row is checked. If more than one row is checked, then calendars for all checked rows appear, superimposed onto each other.

Calendar Type

The type of calendar identified in the **Calendar** column (**Master**, **Group**, or **Position**).

Expanded rows display a history of position start and end dates.



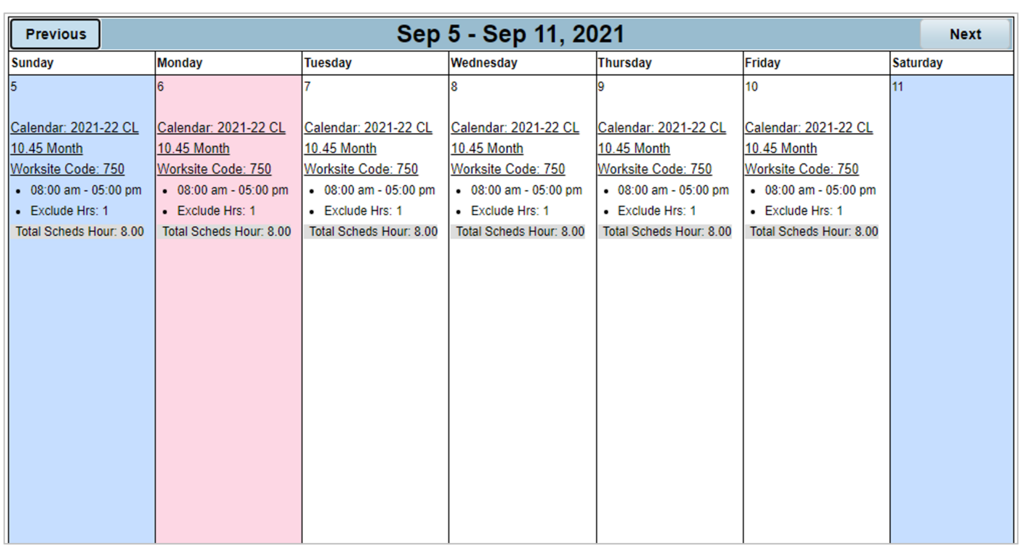
Position Start Date

The starting date of the position.

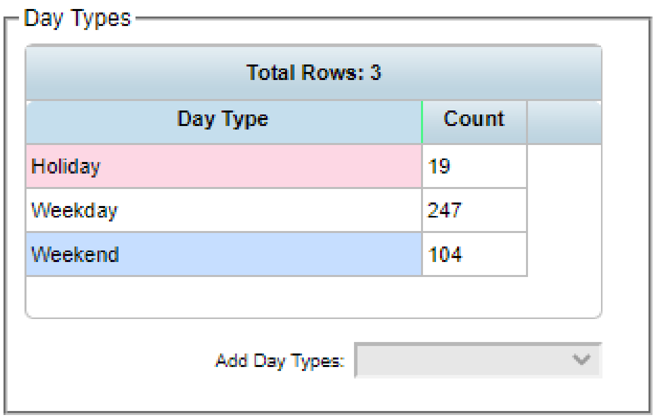
Position End Date

The ending date of the position.

The calendar that appears in the body of the tab displays day types and the employee's work schedule for a week. If calendars for more than one position are displayed, they overlap each other and display both work schedules (if defined). Days with different day types will appear as gradients (multiple colors that fade into each other). If work schedules are not defined for the calendars associated with the employee, then the calendar is blank.



The Day Types area of the tab to select and maintain day types that can be used on the calendar, if a position calendar has been created for the employee. If a position calendar has not been created, this area is display-only.



Day Type

The day type that can be assigned to a day on a position calendar.

Count

The number of days on the calendar assigned to a day type. If the employee has multiple positions and more than one calendar is selected, these values reflect the largest count per day type. For example, if one calendar has 75 non-contract days and another selected calendar has 44 non-contract days, then this count will display 75 non-contract days.

Add Day Types

Additional day types that can are available to select on the calendar.

Buttons

Button	Description
Create	Creates a position calendar.
Work Schedule	Opens the Employee Work Schedule popup for setting up a work schedule for the currently displayed position calendar. This button only appears if a calendar has been created for the position.
Save	Validates, and then saves new and/or modified information on the tab.
Delete	Deletes the currently displayed position calendar.

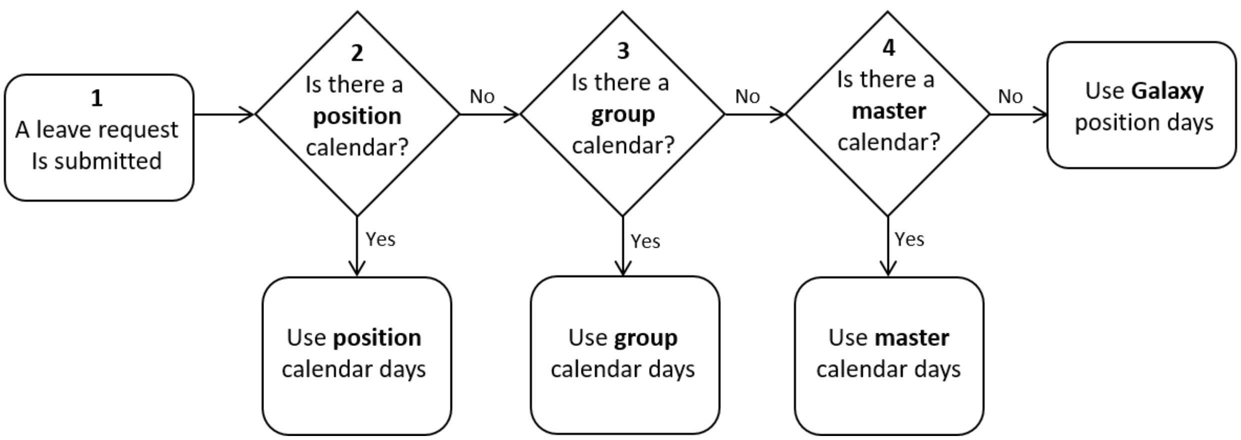
Appendix C.

How GETA Determines Working Days and Hours

GETA determines a position's working days and hours by checking to see if calendars and work schedules have been set up for the position or for the group a position may be assigned to.

Even though calendars and work schedules are optional, GETA will calculate working hours most accurately when calendars and work schedules are set up for your district. This calculation process is described in the figures below.

Figure C-1. Working Days for a Position

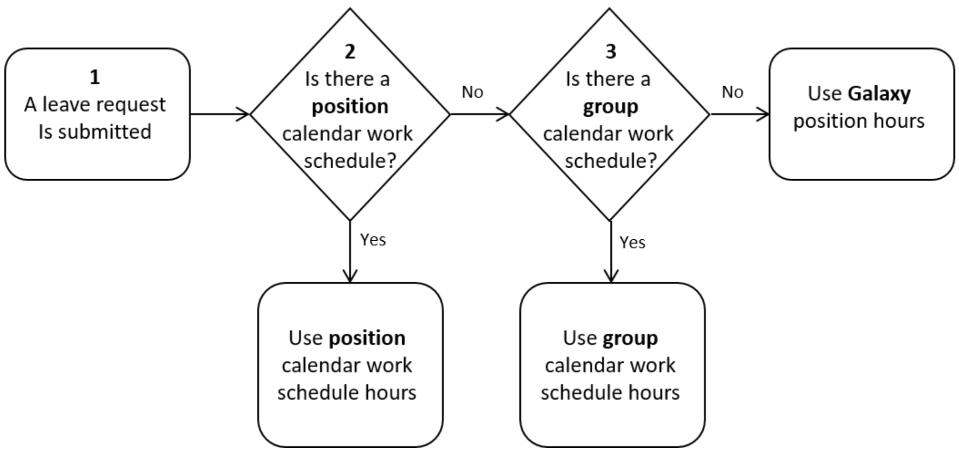


The process shown in the diagram above is described as follows:

1. A leave request is submitted in GETA.
2. Is there a position calendar for the position?
    - *If yes,* working days defined on the position calendar are used.
    - *If no,* GETA checks to see if the position is assigned to a group calendar (step 3).

3. Is there a group calendar for the position (i.e., is the position assigned to a group calendar)?:
   - *If yes,* working days defined on the group calendar are used.
   - *If no,* GETA checks to see if a master calendar exists (step 4).
4. Is there a master calendar?
   - *If yes,* working days defined on the master calendar are used. In this case, the master calendar is the default used for positions that do not have position calendars or are not assigned to group calendars.
   - *If no,* GETA uses the days defined in Galaxy for the position.

Figure C-2. Working Hours for a Position



The process shown in the diagram above is described as follows:

1. A leave request is submitted in GETA.
2. Is there a position calendar with a work schedule for the position?
   - *If yes,* working hours defined on the work schedule are used.
   - *If no,* GETA checks to see if the position is assigned to a group calendar (step 3).
3. Is there a group calendar with a work schedule for the position (i.e., is the position assigned to a group calendar that has a work schedule)?:
   - *If yes,* working hours defined on the work schedule are used.
   - *If no,* GETA uses the hours defined in Galaxy for the position.

Appendix E. Leave Plan Calculations

Sick Leave Calculations

Sick leave calculations are the mathematical formulas used by GETA to calculate the amount of sick leave provided in a fiscal year to employees assigned to a particular Sick leave plan code. A **sick leave plan** specifies the criteria for advancing/accruing a specific number of sick leave hours to regular employees.

Sick leave is calculated based on how it is advanced to employees — either as an amount provided with each pay period or a one-time advancement for the entire fiscal year. Sick leave calculations use annual sick leave units defined for a sick leave plan, the Full-Time Equivalent (FTE) factor defined for employee position(s), and the number of pay periods per year defined for a position.

Note

There is an alternate formula available for advancing sick leave that uses a position's hours per day and months per year instead of position FTE. For information, see *Sick Leave Alternate Accrual Method on page 522*.

One-Time Advancement

Sick leave is provided as a **one-time advancement** if all sick leave for a fiscal year is given to an employee on a certain date. For example, 12 sick leave days may be advanced to an employee on July 1, to be used throughout the fiscal year. The 01P, 02P, and 03P payrolls advance annual amounts of sick leave in July, August, or September, respectively. The month in which to advance the leave is defined by the leave plan associated with each employee.

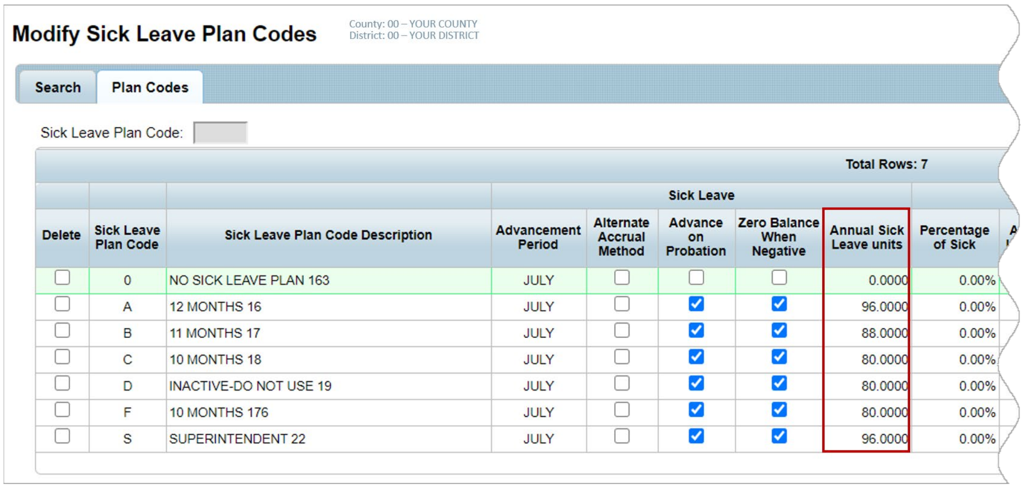
The number of annual sick leave units earned for one-time sick leave advancements is calculated by multiplying annual sick leave units by the prime position FTE factor, as shown below.

$$\text{Annual Sick Leave Units Earned} = \mathit{Annual\ Sick\ Leave\ Units} \times \mathit{Prime\ Position\ FTE}$$

Replace the components of the One-Time Advancement formula for sick leave with the values described below.

Annual Sick Leave Units

The number of annual sick leave units defined for the plan. This value is entered on the Modify Sick Leave Plan Codes screen (Plan Codes tab) in GETA, shown below. One unit represents one hour.


Modify Sick Leave Plan Codes

County: 00 – YOUR COUNTY
District: 00 – YOUR DISTRICT

Search | Plan Codes

Sick Leave Plan Code:

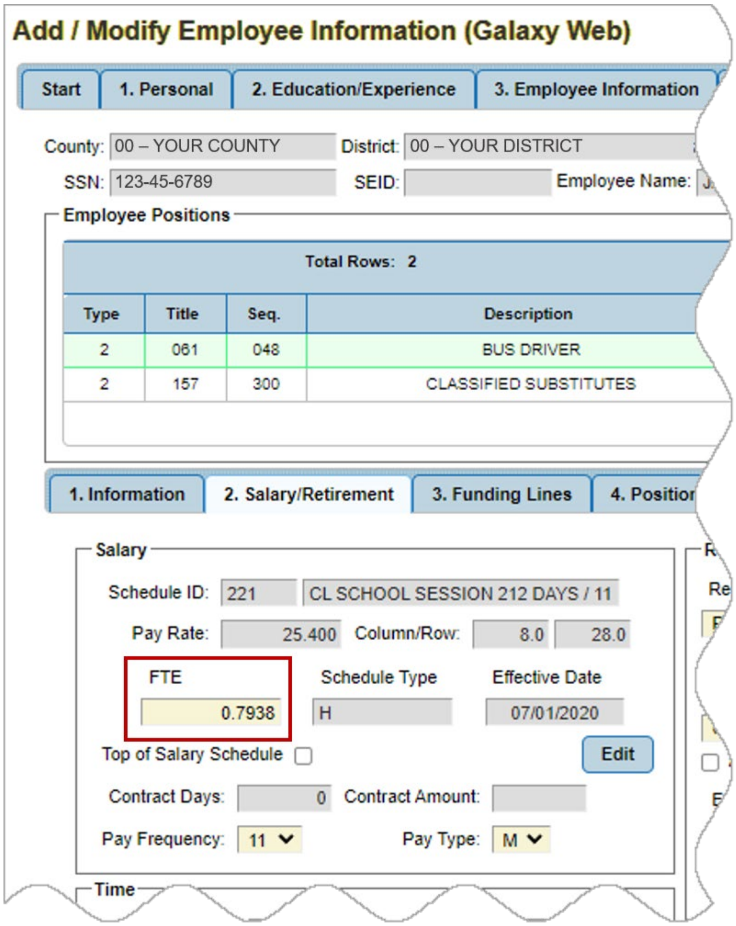
Total Rows: 7

			Sick Leave					
Delete	Sick Leave Plan Code	Sick Leave Plan Code Description	Advancement Period	Alternate Accrual Method	Advance on Probation	Zero Balance When Negative	Annual Sick Leave units	Percentage of Sick
☐	0	NO SICK LEAVE PLAN 163	JULY	☐	☐	☐	0.0000	0.00%
☐	A	12 MONTHS 16	JULY	☐	☑	☑	96.0000	0.00%
☐	B	11 MONTHS 17	JULY	☐	☑	☑	88.0000	0.00%
☐	C	10 MONTHS 18	JULY	☐	☑	☑	80.0000	0.00%
☐	D	INACTIVE-DO NOT USE 19	JULY	☐	☑	☑	80.0000	0.00%
☐	F	10 MONTHS 176	JULY	☐	☑	☑	80.0000	0.00%
☐	S	SUPERINTENDENT 22	JULY	☐	☑	☑	96.0000	0.00%

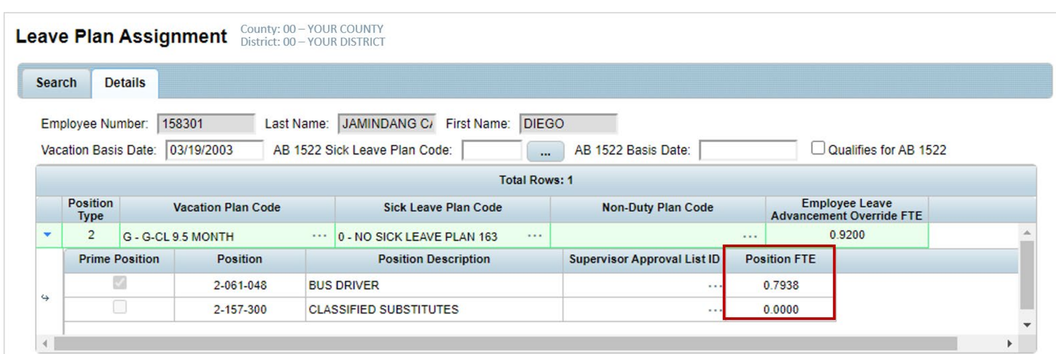
Prime Position FTE

The **full-time equivalent (FTE) ratio** for an employee's prime position is calculated by dividing the number of paid hours during a pay period by the number of working hours in that pay period. For example, if 40 hours per week is considered full time, then **.75** would be considered part time (30 hours per week) and **.5** would also be considered part time (20 hours per week). A value of **1.0** indicates a full-time position.

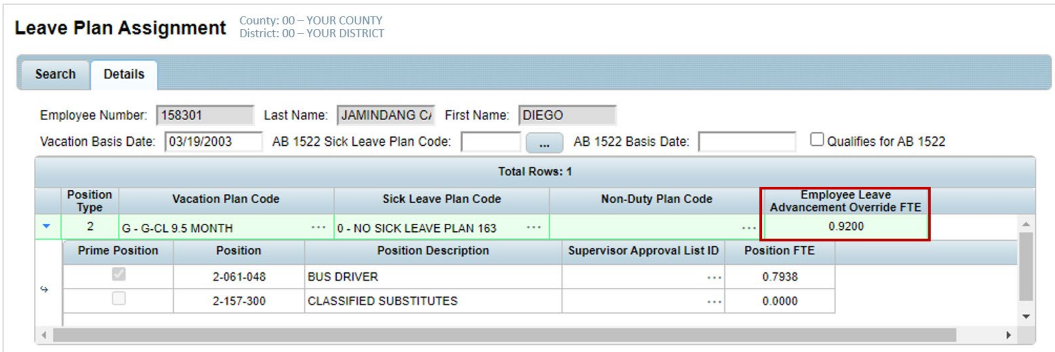
The FTE factor is assigned to a position on Add/Modify Position Information screen or the Add/Modify Employee Information screen in the Galaxy Personnel/Position Control module.



The FTE factor defined for a position in Galaxy displays in GETA on the Leave Plan Assignment screen, as shown below. An employee can have multiple positions in GETA. This field cannot be updated in GETA.



You can override the prime position FTE used in leave calculations for an employee by entering a value between **0** and **1** in the **Employee Leave Advancement Override FTE** field on the Leave Plan Assignment screen in GETA.



For example, if your district advances 80 hours of sick leave in July, and position FTE is set to **.75**, then the following FTE override values would affect the sick leave calculation as follows.

- *If this value is* ***0***, then the position FTE value remains .75. Sixty hours are advanced (80 multiplied by .75).
- *If this value is* ***1***, then the position FTE value is overridden by a value of 1 Eighty hours are advanced (80 multiplied by 1).
- *If this value is* ***0.5***, then the position FTE value is overridden by a value of 0.5 Forty hours are advanced (80 multiplied by 0.5).

Pay Period Accrual

Sick leave is **accrued** if all sick leave for a fiscal year is based on pay period. For example 12 sick leave days may be accrued by a monthly employee, at the rate of one day per month.

The number of accrued sick leave units earned for pay period accrual is calculated using the same formula for one-time advancements, except the result is divided by the number of pay periods per year, as shown below.

$$\text{Accrued Sick Leave Units Earned} = \frac{\text{Annual Sick Leave Units} \times \text{Prime Position FTE}}{\textit{Pay Periods Per Year}}$$

Replace the components of the Pay Period Accrual formula for sick leave with the values described below.

Pay Periods per Year

The number of times the position is paid during the fiscal year. This value is entered in the **Pay Frequency** field on the Add/Modify Position Information screen (Salary tab) in the Personnel/Position Control module in Galaxy.