Staff Meeting –Travel/Payroll Training

April 4th & 5th, 2016

1. User Account Center
	1. Setup User Profile
		1. Mobile Phone Number
		2. Personal Email Address
		3. Security Responses (3 questions and provide answers)
	2. Reset Password (if needed)
2. PeopleSoft **Financials PRD** - **https://kctcs.mycmsc.com/**
	1. User Defaults (should already be set)
		1. Organization Data**:** Default ChartField values
			1. **GL Unit**: 31010 (should automatically populate and cannot be changed)
			2. **Fund**: 01
			3. **Program**: 01000
			4. **Class**: 61501
			5. **Project**: should be left blank
			6. **Dept**: 701065
		2. User Defaults**:** Expense Defaults
			1. Business Purpose Description: Fire Department Training
			2. Business Purpose: Training
	2. Delegate Entry Authority (most should already be set)
		1. Peggy Bryant – pbryant0019
		2. Brenda Goddard – bgoddard0004
		3. Delores Montgomery – dmontgomery0058
		4. Casey Smith – csmith1135
		5. Brian Steele **\*NEW\*** -- bsteele0001
	3. Creating an Expense Report
		1. Business Purpose (should default to Training)
		2. Business Purpose Description (should default to Fire Department Training)
		3. Work Location: FRT15
		4. Destination Location: City, State (e.g. Lexington, Kentucky)
		5. Attachments
			1. Required for travel that is being paid by another Area’s budget
				1. You must attach a BA3d (Casey will send to you PRIOR to travelling), this will show the budget sting (accounting details) that your travel should be charged to.
			2. Required for overnight travel
				1. Only **ONE** pdf document can be uploaded. You must include: BA3d (if being paid by another Area’s budget; Casey will send to you PRIOR to travelling), hotel receipt, fire school brochure cover sheet & schedule/agenda page(s).
				2. If not attending a fire school but it is still an overnight travel you must include: BA3d (if being paid by another Area’s budget; Casey will send to you PRIOR to travelling) & hotel receipt
		6. Date
			1. All employees will have 45 days to submit an expense report. If an expense report is older than 45 days, when submitting, a comment will be required for **EACH** line that has a date older than 45 days.
			2. The expense date cannot be a future date.
		7. Expense Type – **MILEAGE**
			1. Description (refer to Common Phrases for Travel)
			2. Originating Location
			3. Destination Location
			4. Miles
				1. You **MUST** look up mileage in MapQuest. It is still the shorter of the two distances -- either from your home address or our Office address, whichever is closer to the destination.
				2. If you submit mileage that doesn’t match what MapQuest shows the auditors will send it back and it will not move forward for payment.
			5. Accounting Details
				1. If travelling to another Area for non-Area 15 instruction, you will need to change the Class Code (info will be on BA3d)
		8. Expense Type – **HOTEL/LODGING**
			1. Description (refer to Common Phrases for Travel)
			2. Amount
			3. Number of Nights
			4. Merchant (hotel name)
			5. Accounting Details
				1. If travelling to another Area for non-Area 15 instruction, you will need to change the Class Code (info will be on BA3d)
		9. Expense Type – **MEALS – EMPLOYEE TRAVEL**
			1. Description (refer to Common Phrases for Travel)
			2. Amount
			3. Accounting Details
				1. If travelling to another Area for non-Area 15 instruction, you will need to change the Class Code (info will be on BA3d)
		10. Summary and Submit
		11. Verify Total Amounts
		12. Final Review
3. PeopleSoft **HRMS PRD**- **https://kctcs.mycmsc.com/**
	1. Time and Absence
		1. Select Job Title
		2. Navigate to the correct pay period
		3. Addl. Info (to select Locality)
			1. Each locality shall be reported on its own line of the timesheet.
			2. **If working in the city limits, choose the city. If not working in the city limits, choose the county. If the city does not have a local tax, choose the county. If the county does not have a local tax, choose the “NO LOCAL” selection.** (Basically, always start with the city, then the county if the city is not found).
		4. Enter the number of hours worked for the days worked during the semi-monthly pay period.
		5. Continue adding rows and selecting localities until the timesheet is complete.
		6. Once the timesheet is complete, click on the Submit button to route the timesheet to your supervisor for approval.
			1. Every time you click Submit your supervisor will get an email requesting time approval.
			2. Use Save for Later until you are finished with time entry. Clicking Save for Later will not request approval from your supervisor.
		7. Email Casey a justification sheet (like you’re currently doing)
			1. This will be used to complete documentation that Casey has to report to the Fire Commission office.
			2. Casey will also use this to complete any Fire Commission paid travel
			3. Brian will use to verify time entered electronically