

CIMS – Human Resource Notes

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Last Updated: October 2005

Position Information – Accumulation in History

CIMS program PRO.300 is the module used to record and maintain all information for an employee pertinent to Human Resources in terms of employee history and tracking where all staff has been and done within the district. This information is appended to the existing employee demographic. Specifically, PRO.300 is used to:

- Maintain annual employment information for all employees (ie: location, FTE, Job, grade and step)
- ****Further:** To maintain unusual occurrence information when the payroll assignment is not complete enough (ie: employee belongs to multiple locations, employee has more than one job title, assignment effective dates for payroll do not match H/R)
- Maintain annual teaching assignments (ie: Senior High, French, Resource, Math, Team Leader)
- Maintain number of hours and with who/what resource Para's/CEA's are assigned to annually
- Maintain employee leaves (ie: type of leave, expected return)
- Project and report on staffing for upcoming year based on current information + anomalies and conditions

This PRO.300 information is independent from payroll. Payroll may have access to it but the information contained is in addition to what is included in the payroll assignment(s). It is the report that compares current PRO.300 vs. active assignment that reconciles information between the two parties.

*You can expect that in a District with 10,000 students there will be 7,000 entries made annually. Because CIMS is integrated (with Student to automatically collect current teaching information and Payroll to automatically collect current job, FTE, location information) **manual effort to maintain this information is drastically reduced.**

Preview of what information in history record appears like:

The screenshot shows a software window titled "Employee Record Profile Lines" with a sub-header "Employee Reports". It displays a table with columns: Locn, Posn, FTE, Rate, From, To, TY, Comment, and Subjct. The data rows are as follows:

Locn	Posn	FTE	Rate	From	To	TY	Comment	Subjct
01	O	100.00	100.00	9/01/00	6/30/01	AT	RES/PHYSED	RESO
01	D	100.00	100.00	4/01/99	6/30/99	LV	MAT LEAVE	
02	G	70.00	100.00	9/01/99	3/31/99	AT	WITH H. JA	
08	E	30.00	100.00	9/01/99	3/31/99	AT	SP FTE WIT	SS

On the right side of the window, there is a "Demog" section with buttons for: Hire/Term/Exp, Catg/Acad/Skills, Certif + Endors, Info/Emg/Benef, History, Payroll, Assignment, TD1, Abs Calendar, Work Calendar, and Next Employee. At the bottom right, there are "New" and "Cancel" buttons.

The above history record indicates that Will Abderdeeny:

- a) Is a current department Head at Location 01 teaching resource and phys Ed.
- b) was on Mat Leave for the end of the 1999/2000 school year
- c) had a split teaching assignment at location 08 and location 02 in the 1999 school year

Understanding the Index Screen

Information is not automatically sorted. When input is appended, remember to 'A'dd your entry in the appropriate spot. Most districts choose to maintain their information Newest to Oldest, ie: new assignment information should be 'A'dded before the first line in order to upkeep the top/down approach.

TIP: 'A'dd will automatically default with the existing assignment information (to assist you in not having to key everything over again if new assignment reflects current) indicated by Payroll.

Understanding the Input Screen

The Index screen (shown above) shows summary of each history. If you place a 'C'change beside a line(s) more detail will appear:

```

4/16/03  FY  3 DEMONSTRATION SCHOOL DISTRICT      13:26:31 QPADEV0002
EMS      Employee Record Profile Lines           Ref: PRO.300L.11
Emp#:    910140  ABERDULIG, JENNIFER V.          8/20/02  CURRENT  *MORE*
Record Type:  AT  CHANGED  4/16/03  TEACH  100.0000
Location:    01  DAKOTA COLLEGIATE              DONNA    TEACH  I    2
Work Location: 06  ECOLE GLENWOOD              11/04/96 12/31/29
Position:    TEACHER                          ZORO    PERMPROF
Subtype/Job:                               COACH   GR5      JR
Status/Leave: RETIRE  RETIRED                  KIND    MATH     PED
Add Title:                                     SCI     SR       1990 PRF
Effective:   9/01/02 To 4/24/03
FTE:        50.0000  Eval Pending  2
Hours/Day:   2.2512

Table/Grd/Stp: TEACH  1  _
Comment:
Replace/Acct:
Change/SAR#:  3001
Letter Type:  SCHEDD
Work Schedule: DAY  9AM - 3:30PM
TEXT1
TEXT2
Mode: Change      F4=Index  F13=COPY  F14=PASTE  F12=Cancel  Cancel? N
MA  a                                                    21/002
  
```

- From and To dates identify contract start and end. This is controlled separately from payroll and allows H/R to run reports based on any effective date range
- Type is important. It indicates types of activity and assist in reporting for major groups, namely;
 - AT: Teaching Assignment info containing all FTE, location, salary, job title and subject area info
 - AS: Support Assignment info (clerical,custodial..) containing all FTE, salary, comment info
 - AC: Assignment Info Casuals or TOCs (Optional) We suggest that maintaining this is not necessary within PRO.300
 - LV: Identifies leave info for staff
- SubType holds job title information, ie: within some payroll groups the position field (eg: CLERIC) does not contain enough info. Subtype allows you to further breakdown a job group into subgroups (eg: RECEPT, HEADSEC..)

- Status/Leave - another sub-group field that allows user to identify TERM, Leave Type, RECALL type of information on staff.
- Skills/Subjects holds the subject areas and grade levels for the current teaching assignment. Subjects can be added/deleted. Subject codes must first be pre-defined in EIS.132. Subjects can be auto-loaded from the master schedule in student or from PSP records (Manitoba).

Tips regarding recording employees with multiple locations

Employees allocated to several locations require manual adjustment multiple lines. Additional lines must be added indicating the other location(s) information (FTE, Comment). By adding multiple lines for multiple locations, the employee will appear on multiple location listings with appropriate FTE for each location.

Locn	Posn	FTE	Rate	From	To	TY	Comment	Subje
01	O	100.00	100.00	9/01/00	6/30/01	AT	RES/PHYSED	RESO
01	D	100.00	100.00	4/01/99	6/30/99	LV	MAT LEAVE	
02	G	70.00	100.00	9/01/99	3/31/99	AT	WITH H. JA	
08	E	30.00	100.00	9/01/99	3/31/99	AT	SP FTE WIT	SS

In the example above, in 1999 school year the employee was in total 100FTE but allocated 70% at location 02 and 30% at location 08.

Tips regarding including position Sub-Type Information

EIS.995 reporting can sub-total employees based on SubType. If the breakdown by Position is not adequate (ie: does not separate Principals, Admin, Resource, etc) for certain reporting, use the SubType field. The position field should be quite generic. If you find that the position is too broken down, generalize it and include the detail in sub-type.

Tips regarding Education Assistant (TA, CEA) Information

The History screen can be used differently for different job groups. Educational Assistants for example require hour information and comment information could contain Student Name (and CIMS number) information to link to student.

Details: Entering Leaves on CIMS

1. Leave location information indicating where employee is on leave from. HINT: Input ONLY the school/location code ... the system will fill-in the rest of the location information. If the employee is NOT to show up on location lists, assign him to a 'leave' location.

2. Input Employee Position information (Job Code)

Input Appropriate FTE% at time of Leave

2/14/00 FY 0 SEVEN GMS SCHOOL DISTRICT ION #10 14:40:38 DEB
 EMS Employee Record Profile Lines Ref: PRO.300L.11
 Emp#: 910002
 Location: 004 BOARD OFFICE STAFF
 Position: SUPT
 FTE: 100.0000
 FULL Pay Rate: 1000.0000
 Unit of Pay: MONTHLY
 From 9/01/98 To 10/31/98
 Accum
 Comment: DEFERRED SALARY
 Type: LV
 Pay Table: SUPT Grade SUPT Step 2
 Misc 1:
 Misc2:
 Misc3:
 Misc4: DS
 Skills/Subjects/FTE
 Mode: Change F4=Index F12=Cancel Cancel? N
 Mā a 04/020

3. Input Leave From and Through Dates

4. In comment, complete type of leave and any other useful comment type information

5. CRITICAL - Type must be LV to indicate 'Leave'

6. In Status identify the appropriate Leave Type - For statistical reporting, specifically

- DS Deferred Salary Leave
- ED Educational Leave
- EX Exchange Leave
- MT Mat Leave
- PE Pension Leave
- SK Sick Leave

**Note: You can use Windows Copy and Paste to a) ask to change the active assignment line, b) highlight with your mouse the area you wish to copy c) select Copy ... d) request to add the new line and Paste contents of active assignment to new line!

Entering Multiple Location Information For Employees at more than one location

On an initial assignment add at the beginning of each year, the system automatically builds a record for each person's primarily location. In order to have the employee show in multiple location listings for H/R, an additional record must exist in PRO.300 indicating appropriate FTE and the additional location. In the sample below, the system would have automatically generated this teacher as a .75 FTE at OV Jewitt. In order to provide better H/R information

- Line #7, the OVJ assignment FTE was edited
- Line #8 was 'A'dded indicating a .25 or 25% FTE at Governor Semple

2/14/00 FY 0 [] 15:11:55 DEB
 EMS Employee Record Profile Lines Ref: PRO.300L.01

Emp#:	910476	ROM	[]	ACCUM:	39.50				
CMD	Locn	Posn	FTE	Rate	From	To	TY	Comment	Subjects
-	TOP		.00	.00	0/00/00	0/00/00			
-	1	VICTO	TEACH	100.00	4.75	8/29/95	8/30/96		
-	2	VICTO	TEACH	100.00	4.75	8/26/96	12/31/96	YR	
-	3	VICTO	TEACH	100.00	5.67	1/01/97	6/27/97	TB	
-	4	VICTO	TEACH	100.00	5.67	8/27/97	6/30/98	YR	ELA GR4
-	5	VICTO	TEACH	100.00	5.67	8/28/98	6/30/99	YR	ELA GR4
-	6	OV JE	SUB	100.00	6.53	8/31/99	12/31/29	NA MARY	HOME
-	7	047 O	TEACH	50.00	5.33	8/30/99	6/30/00	YR	HOME
-	8	036 G	TEACH	25.00	5.33	8/30/99	6/30/00	YR	HOME
-	9	OV JE	TEACH	25.00	5.33	8/30/99	6/30/00	PL PERSONAL L	COUNS

LOCATE ____ Valid Commands: A C D L F E Cancel? N

MA a 14/003

Record Type must indicate YR as this is the employees YR (annual assignment)

**Special Note: Both assignments should carry the subjects

**Note: You can use Windows Copy and Paste to a) ask to change the active assignment line, b) highlight with your mouse the area you wish to copy c) select Copy ... d) request to add the new line and Paste contents of active assignment to new line!

Notes - Identifying Employee Job Titles

In order to attain Employee information in appropriate H/R groupings, eg:

- Admin (VP, PRINC)
- Resource
- Special Needs
- Physical Education
- Library
- Custodial
- Teachers
- Guidance
- Music
- Technology & Applied Arts
- Para's
- Secretarial

Use the Sub-Type field within the H/R record. Position and Sub-Type combined provide full reporting capabilities for you. Position and Sub-type may reflect payroll job codes to some extent but allow H/R the flexibility to control their own.

Understanding Annual Assignment – Date Sensitive

The effective from and to dates of the history are critical. By keeping these accurate, it is possible to re-create and pre-forecast. You can replay any date in history by selecting an effective date. You can maintain and forecast the future by inputting future effective dates.

As a year comes to completion, the following steps are taken to begin the hiring process for the upcoming year:

- a) current ongoing active assignment information remains in tact
- b) Leaves are reviewed and manual adjustments are made for returns (PAY.514 reporting)
- c) Expected retirements are noted (End date adjusted, Status Updated, Letter generated EIS.380)
- d) Vacant position information is entered under one vacancy history screen
- e) Maintenance begins within the next year assignment, ie: transfers, new leaves, changes in FTE etc.

EIS.995 is available for all reporting and downloading requirements. A wide variety of summary and detail information is available (refer to EIS995 section).

Position History - Reporting and Downloading Opportunities

EIS.995 Employee Location Listing/Roster:

Consider this option to be similar to a report writer. Based on your selection it can provide:

- Summary District Information of FTE by location, sub-totaled by Position and/or SubType
- Detail District Information of employees by either location or position
- Detail employee roster by location including subjects, FTE, comments, position, effective dates
- Summary employee roster by location sub-totaled at the bottom by position
- File download to Excel
- Employee Labels
- Skills Listing (eg: provide all employees with RESOURCE skills, or who are currently teaching RESOURCE)

- Can limit the report to specific location(s) (eg: Just one school or all or all high schools ...)
- Can limit report to all positions or selected (eg: TEACH)
- Can select/limit report to employees with certain skills or currently teaching certain subjects (eg: MATH and SR)
- Can select certain record types (eg: Leaves (LV) or Just Teaching Assignments (AT) or just Support Staff (AS) or a combination of ... for any effective date range or specific date!
- Can product either detail, summary, or statistical information
- Can run based on start date (everything that started for a particular month), ended (everything that ended in a particular month), or effective date (anybody that was active for a specified date range regardless of when the assignment started or stopped) AND Backdate (any items that were backdated)

Sample Location Listing

Microsoft Excel - eis9952

Page 1

EIS-995
01/23/01

SCHOOL: 043 West St Paul

Employee Roster
As at: 12/31/00

Employee Name	FTE	Position	Comments	From Date	To Date	Subjects
ALLARY, ROBIN	0.200	TEACHER	Job Share with M Smith/Calkcutt	09/09/97	09/30/01	GR5
BLOCK, KEVIN	1.000	TEACHER		09/28/99	09/30/01	GR8
BOYCHUK, EUGENIE	1.000	TEACHER		09/01/99	09/30/01	GR5 FR
CALISTO, EMANUEL	1.000	TEACHER		09/01/00	09/30/01	GR7 FR
DUTTON, CYNTHIA	1.000	VICE-PRINC	Term Position until June 30	09/01/00	09/30/01	ADMIN
EDWARDS, ROBIN	1.000	TEACHER		09/28/98	09/30/01	GR8
HARTKAMEN, KAREN	1.000	TEACHER		09/28/98	09/30/01	GR3
ISMAK, EARL R.	1.000	TEACHER		09/09/97	09/30/01	BAND MUSIC COMP
LANCASTER, MARQUERITE	0.887	TEACHER		09/28/92	09/30/01	RESOUR
MALTMAN, JUDITH	1.000	TEACHER		09/01/00	09/30/01	GR1
MARCHENSKI, ILA	1.000	TEACHER		09/28/92	09/30/01	GR4 FR
MATWEE, KATHLEEN	1.000	TEACHER		09/01/00	09/30/01	GR1
MINAKER, BOB	1.000	PRINCIPAL		09/28/92	09/30/01	ADMIN
VACANT	0.200	TEACHER		09/01/00	09/30/01	
VACANT	1.000	LIBRARIAN		09/30/00	09/30/01	

FTE Total:	12.167		
Employee Count:	13,000		
	Filed	Vacant	
TEACHER	10,170	0,200	
VICE-PRINCIPAL	1,000		
PRINCIPAL	1,000		
LIBRARIAN		1,000	

Preview: Page 1 of 1

Sub-Type totals, FTE, totals

- Alphabetical employee roster with FTE, comments, subjects (optional) AND summary FTE totals at bottom of report! Can include all employees for a location or just by Job Type. Can choose to include leaves (or not). Can show vacancies or not.

District Statistical Summary by Job Type

Microsoft Excel - eis9951

Page 1

EIS-995
01/23/01

Employee Roster
As at: 12/31/00

Location Number	Location Name	Loc Totl	Loc FTE	TEACH	ASUPT	VP	PRINC	DTL	AREA	TERM	SODA	ADMED	SUPT
4	BOARD OFFICE	3	4.50		3.00		0.50						
12	RESOURCE CENTRE	3	2.50					1.50	1.00	1.00			1.00
14	CHILD GUIDANCE	1	1.00					1.00			1.00		
22	DIVISIONAL	2	2.00										
31	HC AVERY	25	22.90	20.90		1.00	1.00						
32	BELMONT	10	9.00	8.00									
33	MARGARET PARK	19	14.99	13.99									
34	COLLIBUTT	9	8.25	5.25									
35	FOREST PARK	14	12.42	11.42									
36	GOW, SEMPLE	13	9.40	9.40									
37	SEVEN OAKS M.	29	28.80	26.80		1.00	1.00						
38	RF MORRISON	16	15.00	14.00									
42	VICTORY	17	15.75	14.75									
43	WEST ST. PAUL	13	12.17	10.17			1.00						
44	ELWICK	25	23.33	21.33			1.00						
45	JAMES HSBET	23	20.87	18.87			1.00						
46	AE WRIGHT	19	17.33	16.33			1.00						
47	OW JEWITT	30	25.43	23.43			1.00						
48	FINNEY	22	20.42	18.42			1.00						
49	RIVERBEND	30	28.25	26.25			1.00						
54	LEILA NORTH	27	26.00	24.00			1.00						
61	GARDEN CITY	30	48.43	44.43			1.00						3.00
62	WEST KILDONAN	41	39.50	36.50			1.00						2.00
63	MAPLES	91	89.47	84.47			1.00	4.00					
Total:		333	495.54	447.54	3.00	13.00	25.50	2.50	1.00	1.00	1.00	0.00	1.00

Preview: Page 1 of 1

- User can select all schools or subset.
- User can select all job types or subset.
- Summary at bottom identifies total FTE and FTE by type
- Summary to include vacant positions as well if listed

Listing – Active Employees with certain taught subjects

The same EIS.995 can produce listings based on subject for any date range. You can select for example all current Resource Teachers or all staff who have ever taught Physed. This can assist in the hiring process. The information contained in this report however is based ONLY on assignment information, ie: those subjects that staff have actually performed in your district. You would use an alternate report (EIS.491) for details on who is qualified to teach x.

Employee Name	School	Location	FTE	Comments	From Date	To Date	Subjects
BOBYCHUK, MARY	34	DAKOTA	1.000		0/11/02	0/11/02	RESOUR ADMIN SCI
DAS, FERNANDA M.	51	WARRENES	1.000		0/09/29	0/11/19	ADMIN RESOUR
FOY, CATHARINE	34	COLLUCUTT	0.500	JOB SHARE - S SMITH	0/09/29	0/11/10	RESOUR ADMIN SCI
GOSSELIN, ANN-MARIE	95	COLLUCUTT	1.000		0/11/14	0/11/14	ADMIN RESOUR
LIDZOWSKI, PETER	63	WARRENES	1.000		0/09/29	0/11/15	ADMIN RESOUR PHY
MEIERS, MATTHIAS	34	LEILA NORTH	1.000		0/09/29	0/11/12	RESOUR ADMIN
SUMNER, BERTHA	39	DAKOTA	1.000		0/11/02	0/11/02	RESOUR ADMIN PE
ZELLER, FRANK	65	WARRENES	1.000		0/11/02	0/11/02	RESOUR ADMIN PE
Employee Total:		9					
FTE:		7.500					

Leave Report

Leave information can be reported within location listings and separately. User can select effective date ranges, certain leave type, or ALL. Information can be reported, or downloaded.

Employee Name	School	Location	FTE	Comments	From Date	To Date
BOBYCHUK, MARY	34	COLLUCUTT	1.000		0/11/02	0/11/02
DAS, FERNANDA M.	45	JAMES HSBET	1.000		0/09/29	0/11/19
FOY, CATHARINE	34	COLLUCUTT	0.500	JOB SHARE - S SMITH	0/09/29	0/11/10
GOSSELIN, ANN-MARIE	95	SUBSTITUTE TEACHER	1.000		0/11/14	0/11/14
LOGANBERS, JACLYN	63	MAPLES	1.000		0/09/29	0/11/15
MEIERS, MATTHIAS	34	LEILA NORTH	1.000		0/09/29	0/11/12
NEP, GAIL	62	WEST KILDONAN	1.000		0/09/29	0/11/26
SHYKA, THERESA	42	VICTORY	0.500	SHARE S AE WRIGHT	0/11/20	1/09/30
SPROTT, JUNE	45	JAMES HSBET	1.000		0/09/29	0/11/14
SUMNER, BERTHA	900	CASWALS	1.000		0/11/02	0/11/02
SURBEY, VINCENT E.	95	SUBSTITUTE TEACHER	1.000		0/11/02	0/11/02
Employee Total:		13				
FTE:		10.000				
TEACHER		5.000				
PRINC		2.000				
PARA		3.000				

EIS.995 – Direct to Excel Downloading Opportunity

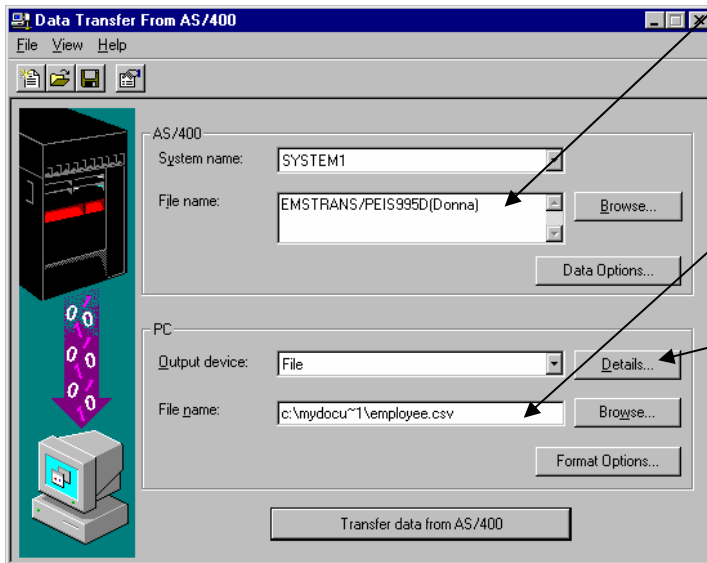
Report information can always be imported into Excel, but the headings and format is not 'data' ideal. If you utilize the selection:

- Build File EMSTRANS/PEIS995D 'Y'

Then instead of a report, an excel compatible file will be produced with appropriate columns of data that can be manipulated, merged, and fully exploited within Excel.

All downloading within CIMS consists of:

- User selects information to be included in download (EIS.995). This produces a file on the AS/400
- Use File Transfer ICON to copy information from the AS/400 to your desktop so that you can open/use it in Excel (From EMSTRANS/PEIS995D(userid) to whatever and wherever you wish to copy it, Type CSV!)
- Use File Open in Excel to open document



Click on Details button to change File type from ASCII to 'comma separated'

Once in Excel, the information will react as if you typed in the information yourself. Add column headings and merge to word. Sort the information. Remove information you may not require. When detail is selected in EIS.995 the following information is downloaded, each into separate columns:

- Employee Name
- Employee Address
- City
- Postal Code
- Location
- Position
- Comment
- SubType
- FTE
- Active From Date
- End Date
- Skills 1 through 10
- Misc1 Field
- Misc2 Field
- Misc3 Field

	E	F	G
1	ENAME	FADDR	FCITY
2	ABERDULIG, JEN V	300 - 207 FORT ST.	PORTAGE LA PRAIRIE
3	SPARKS, ALLAN	50 MAGENTA CR.	WINNIPEG
4			FPROV
5			MB
6			MA
7			FPOST
8			ROC1B0
9			FLOCN
10			04_HASTINGS
11			FPOSN
12			PRINC
13			12345 DAKOTA COLLEGIATE
14			TEACHER

H/R - Utilize Employee Certificates (EIS.309) and reporting (EIS.491)

There is an unlimited amount of certificates available to define and assign to employees. Certificate information can contain:

- Reason for certificate (Type) and effective and expire dates
- Additional certificate information called endorsements that further define the certificate

Utilize Certificates to Identify Staff Qualifications and Teacher Temp Certificates

A Certificate should exist for each teaching staff and Sub/TOC indicating ALL languages, grade levels, and subjects that the teacher is qualified for regardless of current teaching assignment (Teacher skills CAN automatically be updated based on current teaching assignment each year so that you don't have to manually update the skills bank with assignment information).

```

4/24/01  FY  0 DEMONSTRATION SCHOOL DISTRICT          07:48:41 QPADEV0002
EMS          Certificate Endorsement Information      Ref: EIS.309L.01
Employee:    910140  ABERDULIG, JEN V.
Certificate:  TEACHSKILL  TEACHING SKILLS
                          Certificate#: 2338-66
Verify Date: 1/02/98   Type Code: _____
Issue Date:  1/02/99   Rank Code:  _____
Valid Date:  1/02/00   Level Code:  _____
Expire Date: 1/02/01   Regist Date: 1/02/02

CMD Endorsement          Valid          Expire          Notes
-----
- ADMIN                  ADMINISTRATIO  9/01/88
- ENG                    ENGLISH      9/01/99
- FRIMM                  FRENCH IMMERS 9/01/99
- JR                     JUNIOR HIGH   9/01/99
- MATH                   MATHEMATICS   9/01/99
- SCI                    SCIENCE       9/01/96

LOCATE _____ Valid Commands: A C D L F E          Cancel? N
MA a                                                    17/003
  
```

The information above indicates that:

- this teacher has been an administrator since 1988 (history records would show more detail)
- 1999 current assignment is French Immersion English and Math at a Junior School
- Teacher has taught Science before (1996) but is not this year!

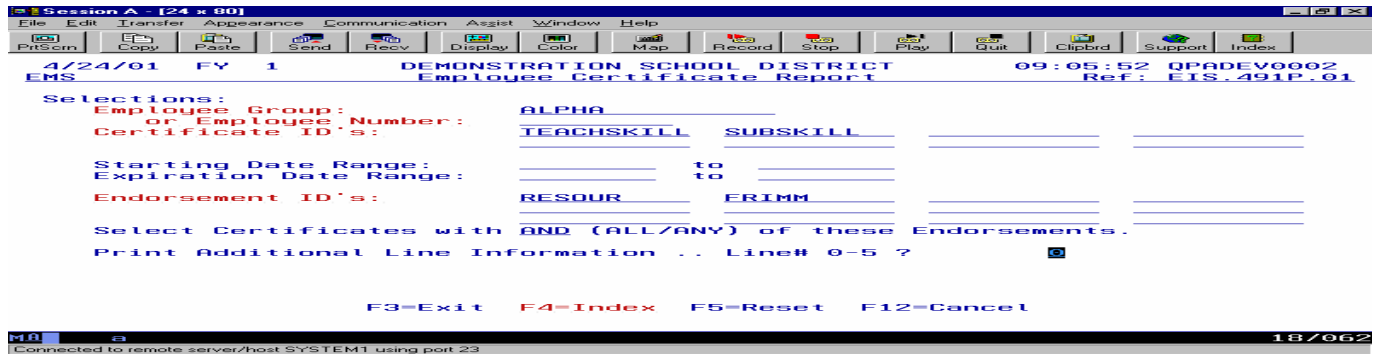
Certificate endorsement information can be updated automatically from the master schedule each year. This skills information is in addition to what is held in the History record, ie: it allows some separation between what subjects a teacher is assigned to vs. what that person is qualified to teach.

Utilize Certificates to indicate Staff Certificate-type achievements

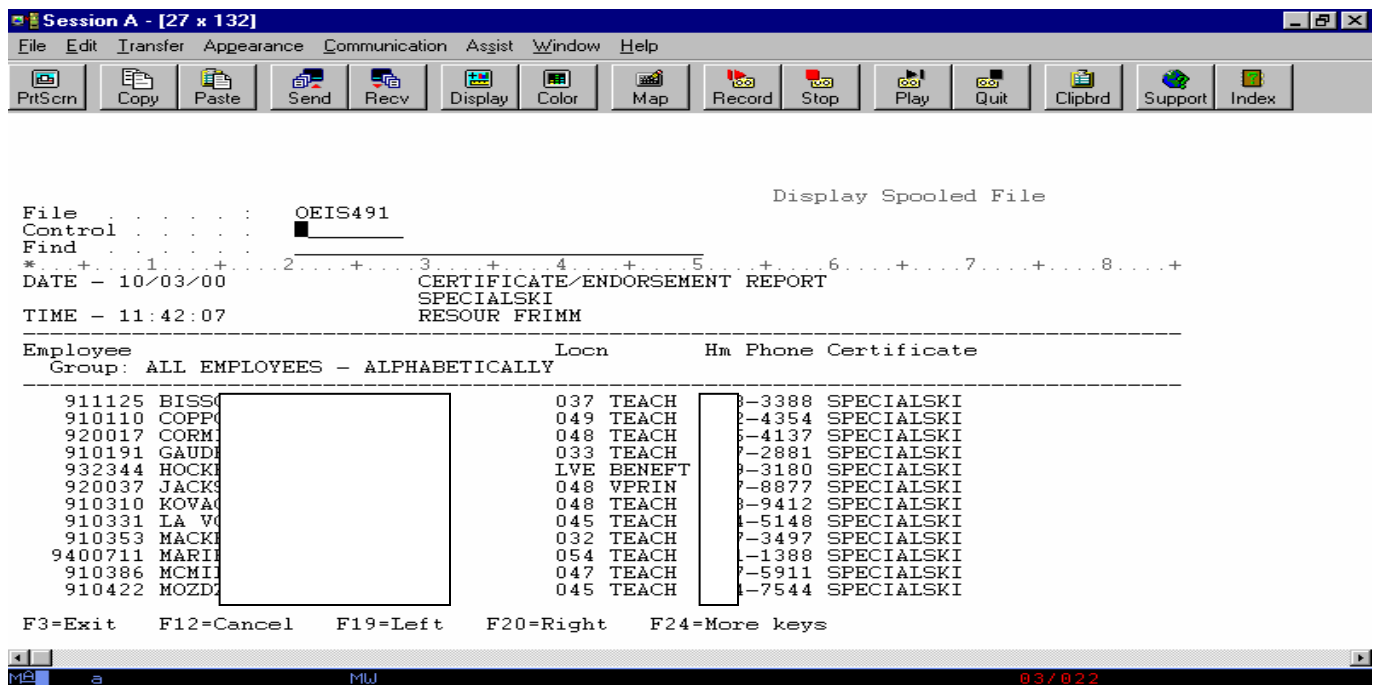
All staff members who have qualifications that need to be tracked/reported on should be using Certificates (Teachers for languages, subjects, levels - Bus Drivers to record License expires, First Aid certificates, Sub/Toc staff to record teaching qualifications ...)

EIS.491 - Reporting Option

- User can select any or all skills and report (example below was looking for French Immersion Resource Teachers)
- Report identifies employee's current location, teaching assignment, and telephone information
- You can select from specific locations, specific certificates, active or applicants.



For certificates like temporary teaching certificate, you can report on expired certificates by utilizing the effective date selects



Employee - Tags and Tag Report Writer

Users can create an unlimited number of tags to use with employees. A tag can contain:

- a single item (eg: Childcheck completed YES/NO)
- columnar/spreadsheet like information (eg: Recording annual parking staff info)
- text information (eg: Word-like)

Once a tag is setup you can assign it to an employee or group of employees and use the tag report writer to report on information.

Defining a Tag

Use EIS.175 to create a tag definition. A tag need only be defined one-time. Once employees are attached to the tag, ensure that you do not change the contents of the tag definition or delete the tag definition.

Assigning Tag(s) to Employees

Tag Report Writer

Employee Categories

In CIMS, there are many different operations to record additional employee information. Certificates are appropriate for qualifications, skills, evaluations, and date/item oriented information. Tags are flexible in allowing the user to select type of information to enter . Categories are ideal for simple information. Category selection can be found in defining an Employee Group therefore making it readily available for reporting, labels, list, and label reporting.

H/R Integration with Employee Assignment Information (PAY.345)

Payroll utilizes information from PAY.345. Human Resource through EIS.995 reporting utilizes information from PRO.300. It is important to appreciate when you run reports where the information is coming from. Other than EIS.995, information generally utilizes the active information found **outside** employee history information.

Reconciliation between the two departments is attainable by running summaries and detail between the two sets of information, ie: PAY.345 vs. PRO.300.

Other than this separation of information, both H/R and Payroll share all remaining employee information, namely:

- Employee demographic information (SIN,Address,Spouse, Emergency, Academic ...)
- Employee Experience and reporting
- Employee Seniority and reporting
- Employee Attendance history and reporting
- Employee Pay information and reporting

H/R – Seniority and Experience Reporting

Seniority information (date and/or seniority ranking number and/or experience) is found in basic employee information (EIS.301 – Hire/Rehire information and Experience). Each employee group sets its own policy on how seniority is accumulated. If seniority is gained by time worked, then your payroll processor will automatically be “upping” the experience field(s). If seniority is date based, it is the user responsibility to maintain this information in hire/re-hire. Districts should have detail information regarding how seniority is working in CIMS per Group.

The screenshot shows a terminal window titled "Session A - [24 x 80]". The menu bar includes File, Edit, Transfer, Appearance, Communication, Assist, Window, and Help. The toolbar contains icons for PrintScreen, Copy, Paste, Send, Recv, Display, Color, Map, Record, Stop, Play, Quit, Clipbrd, Support, and Index. The main content area displays the following information:

```

4/16/03  FY  3 DEMONSTRATION SCHOOL DISTRICT      13:36:04  QPADEV0002
EMS        Employee Experience Information          Ref: PAY.303E.11

Employee: 910140
Active:   Y      ABERDULIG, JENNIFER V.

Elementary Exp   : 3.640      Current Hire    : 2/20/02
Secondary Exp   :             Original Hire    : 1/01/72
Other/Rel Exp   :             Seniority Date   : 5/01/88
Misc 4 Exp      :             Vacation Date    : 1/01/02
Misc 5 Exp      :             Seniority Number : 540

ADDITIONAL EXPERIENCE      Union/Pension   : MSUPER

Division Exp   :
Within Province Exp:
Out of Province Exp:

Annual Seniority Hours
2003          333.3300
2002          222.2200
2001          111.1100

Mode: Change      Cancel? N
  
```

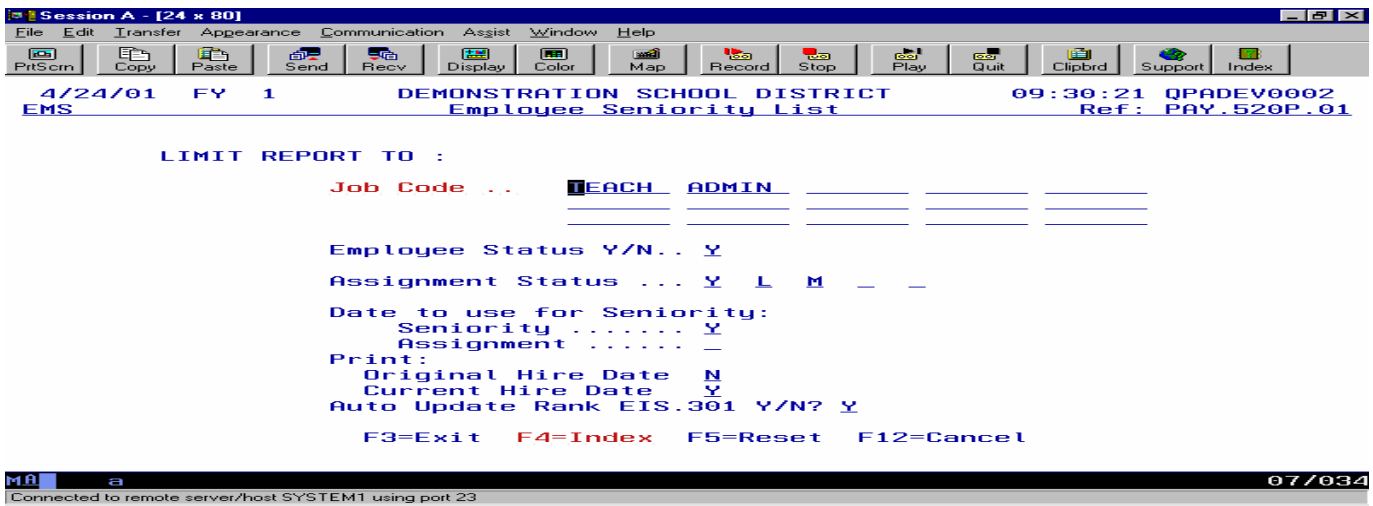
- Note: Several dates available so you can always see breaks in service periods and still maintain original hire date information
- Separate seniority number field for groups with ranking and auto-payroll processing options

- There are separate experience values for appropriate groups to maintain experience for seniority purposes. The system can auto-update experience at each Pay Period automatically which can also affect pay grade and step. For appropriate groups, Seniority Hours can be automatically calculated.

There are several columns to hold experience information. This allows you to separate types of experience as well as add/show experience accumulated outside your school district. This information may be entered manually per employee with auto-updating from the payroll processor if applicable.

Seniority Listing – PAY.520

Use this report to identify employees and potentially assign seniority ranking. Select the job code(s) to include, which employees to include (Active, those on leave, those on sebatical...).



Reviewing Employee Time Work and Time Missed Information

Absence and time worked information is maintained daily in CIMS (either manually by schools or automatically with the assistance of TSSI). Absence reasons are pre-defined by each district along with policies regarding both absence accrual (eg: accrue 16 hours * FTE each pay period) and what to do when banks have been depleted (ie: dock pay or just report?). Absence history is NEVER lost in CIMS. You can from current year go back and know exactly what date(s) an employee was away, for what reason, who the replacement was, and what account was charged.

Absence banks are updated each time a payroll is processed. This means that there are really 2 things to consider when reviewing attendance, ie:

CMD	TOP	JobCde	AbsCde	Balance	Beginning	Earned	Used	Current
---	1	ADMINS	SICKT	14.0000		14.0000		
---	2	BUILD	SICKT	14.0000		14.0000		
---	3	TEACH	SICKT	240.0000	230.0000	9.0000	1.0000	
---	4	TEACH	SLMTC	43.0000		48.5000	5.5000	
---	5	TEACH	VACT	1.0000		1.0000		

Valid Commands: C L F E

05/003

In the above example, Jen's SICKT balance is 240 days. She started the year with 230 days, earned 9 days of sick time, and was away only once this year (fiscal). The current column indicates the number of days taken during this pay period ... values will disappear from current and appear in used once a payroll is processed.

Use Pay.805 to review individual absence records. From this single option you can:

- view absence summary in calendar format
- function key to see banks (as above)
- function key to ALL YEAR detail history
- function key to PRINT options

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
00 JUN 01						
00 JUN 05				SICK 2.0		
00 JUN 12						
00 JUN 19						
00 JUN 26						
00 JUL 01						
00 JUL 03						
00 JUL 10						
00 JUL 17						
00 JUL 24						
00 JUL 31						

F3=Exit F6=AbsHst F7=Banks F8=Print F9=Prev F10=Nxt F11=Cur F12=Cancel

Best Attendance Reporting options:

- a) PAI.592 – Print individual absence detail information
- b) PAI.502 – Print absence accrual/taken information in detail or summary for an employee or employee group
- c) PAI.504 – Review/Print absence problems, eg: provide list and labels for all teachers with more than 10 absence days taken between September and now.
- d) PAY.595 – Summary/Statistical spreadsheet showing absences by group totals by day for selected date range

Other Reporting Options worth special mention

Look to menu PAY365 – Employee balance Listings for additional reporting for:

- a) Salary
- b) Age Projection
- c) Absences
- d) Deduction Information

The screenshot shows a terminal window titled 'Session A - [24 x 80]'. The menu lists 15 options with their respective codes:

Option	Code
1. Employee History Profile	PAY.790
2. Summary YTD Deduction Journal Listing	PAY.795
3. Summary YTD Pay Journal Listing	PAY.796
4. Employee Paid-To-Date Report	PAY.563
5. Schedule of Payment to Employees	PAY.991
6. Employee Roster/FTE Listing PRO.300	EIS.995
7. Annual Salary Report with Totals	PAY.340TC
8. Payroll Cheque Listing -- Regular and Voided	PAI.510
9. Employee Absence Report	PAI.504
10. Employee Time Absent/Worked Detail Listing	PAI.502
11. Absence Monthly Summary Listing	PAY.595
12. Employee Work/Missed Detail Listing	PAY.592
13. Support Staff Report by Reason/Absence Code	SUB.993
14. CUPE Retirement Projection Listing	PAI.530
15. TEACH Retirement Projection Listing	PAI.531

More...

Option or Menu Item _____

Terminal footer: MA a 22/023
Connected to remote server/host SYSTEM1 using port 23

EIS.380 – Employee/Applicant Quick Entry and Lookup

Purpose: Provide a more convenient method of adding/maintaining basic employee and skills information to CIMS.

** Screen #1 = Employee Basics. Also new Items → Include on Sub List? Include on Applicant List?

** Second Screen user-definable (EIS.180) based on Applicant vs. Sub vs. Tchr vs. Support vs Casual

Information is updated in Certificate/Endorsement area of Employee. Classifications can be made to Cover, Major, Primary for subjects to assist in reporting and downloading automatically to Sub-Call systems.

Employee Contract Print and Management - EIS.380, EIS.565 (MB)

CIMS can be used to print contracts (per person) or in batch as well as manage where the contract is (sent for approval, sent to employee, received and filed). Everything stems from the position record, ie: when you setup the new assignment(s) include a contract type and Board Report date in order to be able to print contracts.

Pre-Requisites:

1. Use EIS.180 to setup contract types. Use SCHEDA (Full-time contract), SCHEDB (Term contract), and SCHEDST (Sub-Teacher contract)
2. Ensure that Take Two has scanned in the appropriate overlays for each schedule. By default all Manitoba customers have SCHEDA, SCHEDB, and SCHEDST included.

Process:

Use EIS.380 on the assignment line in order to describe the contract that the employee should be getting.

8/22/05 FY 4 DEMONSTRATION SCHOOL DISTRICT 16:40:27 QPADEV0003
 EMS Employee Record Profile Lines Ref: PRO.300L.11

Emp#: 910140 ABERDULIG, JENNIFER V. 5/26/05 CURRENT *MORE*

Record Type: AT CHANGED 6/01/05 TEACH 100.0000
 Location: 01 WACHOVIA SECONDARY DONNA TEACH I 2
 Work Location: 11/04/96 12/31/29
 Position: TEACHER A PERMPROF 100.0000
 Subtype/Job: ENG GEOG GR8
 Status : TERM TERM JR KIND SR
 Leave Type : 1990 PRF

Effective: 12/01/04 To 6/30/05
 FTE: 80.0000 AVG FTE: 70.7107 Skills FTE POSITION#
 Hours/Day: GR7-12 25.0000-
 Letter Type: SCHEDA Eval Pend/Due 5 COUNS 25.0000-
 Table/Grd/Step: TEACH 1 Eval Complete 1

Comment:
 Replace/Acct:
 Change/SAR#: 50201 (YYMMDD)
 Addl Title:
 Work Schedule: DAY 9AM - 3:30PM
 TEXT1
 TEXT2

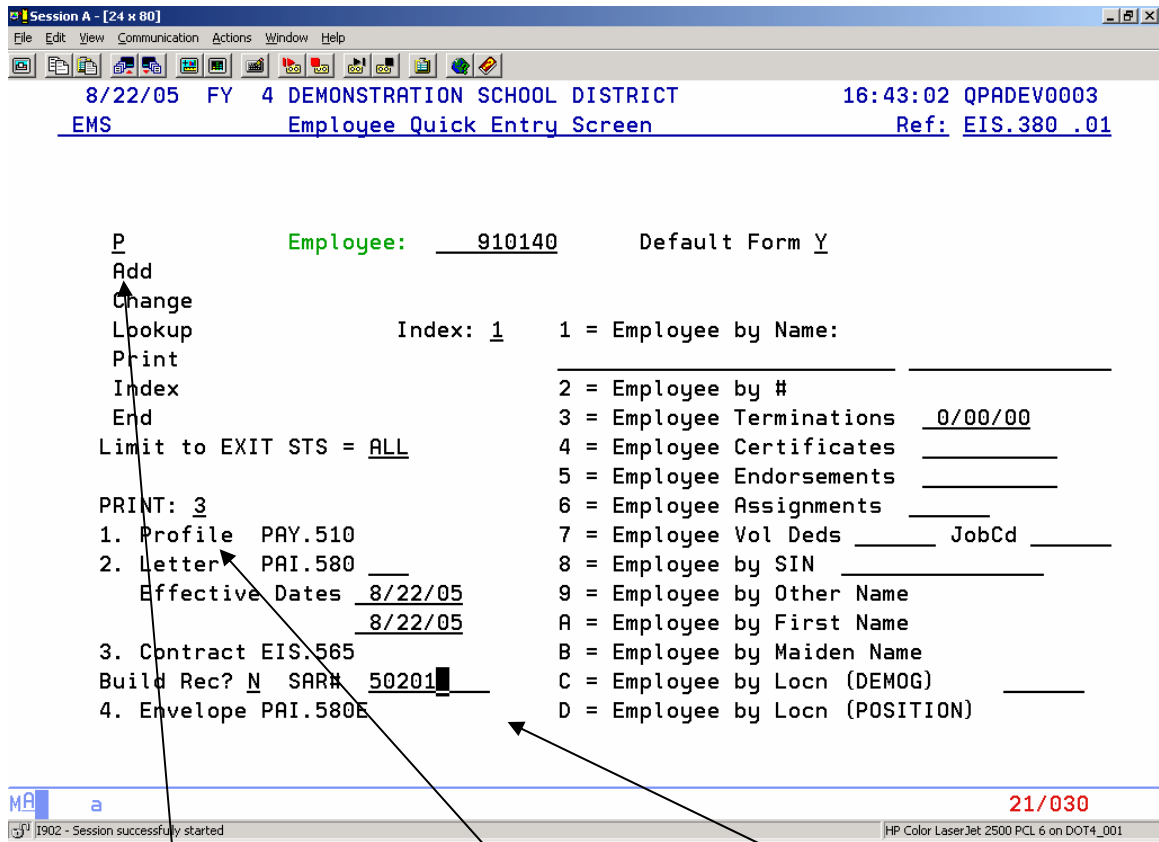
Mode: Change F4=Index F13=COPY F14=PASTE F23=EVALS F12=Cancel

MA a 14/017
 I902 - Session successfully started HP Color LaserJet 2500 PCL 6 on DOT4_001

NOTE: SCHEDA has been inputted in Letter Type

NOTE: SAR# of 2005, February 1st has been used as the board date

You can print the Schedule immediately upon exiting the employee. It will automatically select the legal tray and produce both the schedule and it filled in appropriately with employee information.

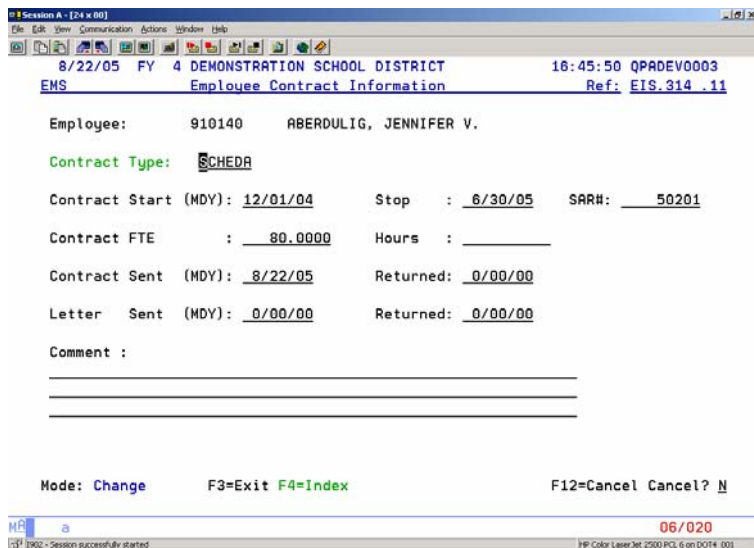


"P" - Print

#3 Indicates print a contract

Limit to 050201 contract information

OPTIONAL: If you want the system to record that you have printed the contract you can indicate "Build Rec?" as 'Y'. Then you can use F23 to manage the dates on contract being approved, signed, and returned.



If you are preparing many contracts, you can complete all the information in EIS.380 and position assignments, then use EIS.565 to print the bulk of contracts.

NOTE: Printing in batch relies on the Board Date .. If you choose to use this method, make sure to use the SAR# field wisely to prevent missing batches or re-using a date so that you cannot print new contracts, etc.

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
8/22/05 FY 4 DEMONSTRATION SCHOOL DISTRICT 16:50:20 QPADEV0003
CANEMS Employee Contract Schedule Form Print Ref: EIS.565P.01

LIMIT TO:
Locations ....
Position ..... SubType/Job...
Line Type(s) . AT
Contract Type SCHEDA
SAR# ..... 050201
Employee .....

Autobuild Contract Record? N

F3=Exit F4=Index F5=Reset F12=Cancel

MA a 20/037
1902 - Session successfully started HP Color LaserJet 2500 PCL 6 on DOT4_001
```

Employee Evaluations Process

CIMS can hold future evaluations so that you may inquire who has evaluations due -EIS.560. Alternatively, you can use CIMS to just record completed evaluations and inquire - who has completed evaluation(s) and in what year - EIS.561.

Evaluation Maintenance

There are several ways to consider maintaining evaluations:

- a) When a person is assigned to a new position (PRO.300) at the time of that entry you could input an expected evaluation and when it will be due (even if it is year(s) in advance). By taking care of this at the time of position hire it means beautiful and meaningful reporting, ie: you can provide lists to schools indicating - here is who needs to be evaluated. Likewise, when a position terminates or ends, the system will indicate 'evaluation pending' and at the time of termination make sure to handle the pending evaluation (cancel/close it if it is no longer applicable). This method works if you know what evaluation is necessary when positions are opened and can apply even years in advance.
- b) At each school year start - run a listing for schools of who has been evaluated and when (EIS.561) and have the admin indicate who they will be evaluating ... Then you can key this information into evaluations for the appropriate staff and manage receiving completed evaluations as well by reporting in EIS.560.

The key is to input expected evaluation information so that you can utilize the reporting from EIS.560. Without inputting that an evaluation is due - the system cannot magically produce a listing to schools.

The system can accommodate an unlimited number of evaluations per employee. Evaluation type(s) are defined in EIS.207 allowing for meaningful reporting based on evaluation type (PROB, PERM, 5YEAR ...). Each evaluation acts independently for reporting.

The screenshot shows a terminal window titled 'Session 0 - [24 x 80]'. The window contains the following text:

```

10/25/05  FY  5  TAKE TWO INC.          16:24:22  QPADEV000B
EMS      Employee Evaluations Information  Ref:  EIS.307 .01

Employee:      1191      AFINOGENOV, CHERYL
CMD  Type  Locn  Req Dt  Due Dt  Recv Dt  Foll Dt  Evaluator Result
-   TOP   007   0/00/00 0/00/00 0/00/00 0/00/00
-   1 DIAL 007   1/01/02 1/01/02 6/30/02 0/00/00
-   2 FORMAL 007  1/01/98 1/01/98 6/30/98 0/00/00
  
```

At the bottom of the terminal window, there is a status bar with the text: "LOCATE ____ Valid Commands: A C D L F E Cancel? N".

10/25/05 FY 5 TAKE TWO INC. 16:18:31 QPADEV000B
 EMS Employee Evaluations Information Ref: EIS.307 .11

Employee: 1191 AFINOGENOV, CHERYL

Evaluation Type: DIAL DIAL Location: 007 SPECTRUM
 Position: TEACHER

Request/Print (MDY): 1/01/02 SubType/Job: _____
 Due Date (MDY): 1/01/02
 Date Received (MDY): 6/30/02 OR Date Closed (MDY): 0/00/00

Evaluator: _____
 Evaluator Position : _____ Result: ____
 Evaluator Position# : _____

Comments: _____

Follow-up Date (MDY): 0/00/00
 Follow-up _____

Mode: **Change** F3=Exit F4=Index F12=Cancel Cancel? N

The Location, Position, and SubType auto-fill once the entry is saved with where the person currently is according to PRO.300. This information will not change if the PRO.300 record changes, ie: the location and position are held right with the evaluation. SO, if the employee moves - then you have to assess whether the location should be changed or whether the evaluation should be closed.

Pre-Evaluation Fields to Fill-In

- Request Date: When did you handle the paperwork?
- Due Date: When is the evaluation to be completed by?

Post-Evaluation Fields to Fill-In

- Date Received: When was the completed evaluation handed in?
- OR Date closed: When was the evaluation considered to be cancelled?
- Evaluator: (Optional) Who completed the evaluation?
- Comments: (Optional)
- Results: (Optional)

Evaluation Inquiry and Reporting (EIS.560)

This report looks at evaluation records and reports based on information found in the evaluation. The only way to select/omit records is based on evaluation type, location .. then by whether or not the evaluation has been completed.

10/26/05 FY 05 TAKE TWO INC. 10:01:01 QPADEV0003
 CANEMS Employee Evaluations Listing Ref: EIS.560P.01

Employee : _____ Leave Blank for All
 Type(s) : FORMAL _____ Requested: 0/00/00 - 0/00/00
 _____ Due : 090105 - 063006
 _____ Received : 0/00/00 - 0/00/00
 Location(s): _____ Closed : 0/00/00 - 0/00/00
 _____ Follow Up: 0/00/00 - 0/00/00

 Sector : _____ Status : N (R)eceived
 Position: _____ (N)ot Received
 _____ (A)ll

BUILD File EMSTRANS/PEIS560 N Page Break by Locn: N
 PRINT (P)rimary Assignment/ (S)ub-Type? P Sort Order: A (A)lpha
 Employee Number? Y (L)ocn
 Eval Comments ? Y Locn/ (T)ype
 Letter Format _____ Locn/ (P)osn
 Label None/Addr/Locn/Eval: N Type: 1 1(3x10)
 Label Starting Row : _____ 2(2x10)

UPDATE Auto Fill Follow-up Date with Today's Date? N Follow-up Code _____
 F3=Exit F4=Index F5=Reset F12=Cancel

MR a 22/057
 1902 - Session successfully started HP Color LaserJet 2500 PCL 6 on DOT14_001

- There are sort and page break options - alpha, by location, by location position ...
- There is a build file option
- There is the opportunity to print letters/labels
- There is an opportunity to print all evaluations for a time period, or just those due or just those received.
- There is an opportunity to auto-fill the followup info for evaluations not yet received.

Employee Inquiry and report on evaluations on or not on File (EIS.561)

This report looks at all employees of a certain position/group based on PRO.300 lines and then reports what evaluations they have or are missing (user selected evaluation types). This is excellent to look for missing evaluations or to assist in determining who should be evaluated. It is also a good checklist once all evaluations have been completed as to all employees of a certain job type and their most current evaluation information.