



February 2007 - Employee Payroll and H/R Enhancements Summary Release 11.0

This release is full of new items and program enhancements for both H/R and Payroll Staff. There are no new modules - but significant enhancement and new utility programs and items that deserve discussion. Job Postings and Workshops are HOT!

Release information should be reviewed as a group. At minimum, Payroll and H/R should meet separately for 1-2 hours to review this document. It is a really GREAT idea to have on-hand the current and last release notes for review and qualification.

.. Our first Web App for Employee was released in November - Job Postings. This module presents job Postings on the web without any web page maintenance. All information is drawn direct 'live'.

Webinar to review this document with Take Two: **Thursday February 8, 10:45am** Central Time (8:45 in BC, 9:45 in AB, 10:45 in MB, and 11:45 in Ontario). Sorry Northern College for going across your lunch hour. With the time changes, we could not avoid crossing somebody's!



CIMS Human Resource Related Items

Location Definitions EIS.127

- New fields have been added for Job Posting Outq and up to 2 employee contacts. When Job postings print/post is selected - H/R can now automatically print the posting to output queue(s) and/or emails the contacts listed so they are aware of the posting.

Employee H/R Information EIS.380

- Enhanced evaluation 'A'dd record. When 'A'dd is selected the current position information for the employee is shown AND now the end date for this position is also indicated. This will help the user to know whether this evaluation should be added to this position or a subsequent one!
- Added name prefix (Mr, Mrs) and name suffix fields to EIS.380. Maintaining these fields is optional.
- Added feature 'Alt Address Y/N'. You cannot maintain summer or alternate address info from EIS.380 directly (use F6 and then you can edit) ... but at least user can see on EIS.380 main screen that an alternate address does exist so knows to F6 to view.

Employee Position Information PRO.300

- Added new fields start and stop time - used for TSSI download
- Enhanced copy/paste function to grab additional title field
- VERY COOL: On 'A'dd there is a new field 'GET JOB POSTING' if you F4 at this field and select the appropriate job posting - all information as per the posting will fill into the new position assignment



Employee History Report EIS.514 **Exciting New Report******

- Great new report that allows you to select appropriate employees based on PRO.300 info and then select for that group of employees how much history to show. Eg: Select to see all employees currently on leave (record type LT) AND you want to see their work history for the last 5 years (select history LT,AT for dates X thru Y).

Employee Report Writer EIS.260/EIS.530

- Added new item #526 to show Assignment Voluntary Deduction Codes as a string, ie: will show all voluntary deduction codes for that assignment (no dates, just codes).
- HUGE: Changed the date format for file build. If build option is selected all date fields will appear YYYY/MM/DD to assist in better conversion for excel.
- On EIS.530 selection of deductions allow ?? logic (ie: select anyone with DENT??? Instead of having to list all the DENT single, family options)

Employee Contract Print EIS.565

- New option to print either envelopes or labels along with the contracts and in the same order. Envelopes/labels or both will be on hold so user can control releasing.

Mass Update Location/Primary Assignment Info Employee Master EIS.964

- This is an ideal utility program to get working at your district. There are always issues with Payroll not updating the front screen location or primary assignment info, ie: assignments expire but F6 to update master is forgotten. This program reviews the PRO.300 records to assess what the person is today and then potentially updates main screen info (location and/or assignment) based on this information. Perfect to use in late September to get the new year information straight! New features:
 - Ability to exclude certain assignments CAS, SUB..
 - Ability to exclude certain locations marked on front for a reason

**** Consider using this option. Before you execute it the first time though make sure report only 'Y' as this process is irreversible once you tell it report only 'N'.**

Employee Roster EIS.995

- New ability to print either labels or envelopes
- New format #8 good for custodial groups or others you want to show work schedule, FTE, and hours information
- Standard formats were only printing comment field. Now if there is replacement/acct info, this will also print on all standard formats on any format that indicates 'comments' will print
- If Additional Title field is being used, then this title will appear on roster rather than position field. If there is no additional title - position will print.
- Added miscellaneous and work fields to the download automatically so each time a download is requested these additional fields will be included

Month End Report to the Board EIS.998

- Both River East and Brandon are using this report to show their trustees appropriate new hire, leave, resignations, terminations etc. Both districts had custom requests as to format and appearance and we have created workable solutions for both that is saving many hours of work to prepare the document AND creating better CIMS PRO.300 records.

Employee Absence Bank Profile PAI.522 **significant enhancements! **

** Excellent report to review overtime banks or anything that you want to see accrual and time taken**

- Removed the restriction to select just a particular absence code - can review them all
- New option to print in summary or detail (summary = one line per emp per absence bank)
- Added option to exclude employees based on earned balance so you can focus just on particular employees

Print Employee Letters (PAI.580 or EIS.380)

- Along with letters a download file is also generated. The date fields in the file have been changed to YYYY/MM/DD so excel will convert appropriately.

Certificate/Endorsement Listing PAY.492

- Great new feature 'Select only if employee has ANY of these endorsements' Y/N ... Rather than print a list of high school teachers and point out those that have vocational experience (could be 10 codes) , use this new Y to limit the list to just those that have at least one of the endorsements and eliminate all others!

Employee Certificate/Endorsement Checklist PAY.495 **New Report**

- New Report to select employees based on PRO.300 and identify whether they have/not a particular certificate/endorsement. Use this to look for say any current teachers and their probationary certificate details. Or look to Bus Drivers and when their license or first aid expires.

Employee Profile Print PAY.510

- Added new general employee verification form for Seven Oaks 'G' in addition to their Sub Profile and Para (EA/IA) Profiles.

Absence Summary Grid Listing PAY.596 ** New Report **

- This new report and build file allows you to select group of employees and which absence values to show. It provides a columnar summary showing total, starting, earned, used for each of the absence codes selected. If Detail is requested it in addition to the banks can show total used based on running through all absence history.

Job Posting Maintenance POS.220

- Added ability when posting a job posting to automatically - post pdf to the webserver, email up to two contacts per location, and potentially print to a printer per location. This can happen automatically when you chose to 'P' the posting.
- Added new field to distinguish job posting as Yes, No, or Internal. This directs the posting to appear on appropriate website(s).
- Added additional skill & FTE, work schedule, and additional title fields to posting. When in PRO.300 you can now auto-fill a position on 'A'dd with the details of your job posting rather than have to key all the information again!

Job Posting Letters/Download POS.522

- New ability to create a download file in addition to letters/list.

Job Posting Web Control Options POS.224 ** New Item for Web **

- New option that allows district to customize their Job Connect website, ie: add additional links (to their hire policies document & other areas of interest) and add text/comments to assist the end user in finding and responding to your posting.

Workshop Maintenance POS.320

- Added indexes to be able to review employees in either name or date of workshop order
- Added additional workshop fields in applicants screen to accommodate health/wellness needs for workshops dealing with health and wellness
- Created additional download options in reporting to download accepted applicants



CIMS Payroll Related Items

Payroll Processing PAI.600M

- For the benefits payroll the usual warning messages for negative cheque, deduction/benefit mismatch and negative voluntary have been removed.
- Direct Deposit register now shows totals at the bottom for multiple direct deposit accounts to assist with balancing (counts and total).
- Pay summary listing OPAI631 enhanced to include employee counts on the summary (ie: 10 employees with OVR1.5)

Employee ROE Print PAI.710

- "other monies" has been added to the termination record (new 17C).

T4 Print PAI.810

- Reformatted for new 2006 specifications. There was a box 40 footnote change as well as new PPIP (Quebec only) fields that moved all other fields. This means old T4s cannot be used.

T5 Print PAI.815

- Reformatted for box 24,25,26 and transmission file adjusted. This means old T5s cannot be used.

Auto-Build Cash advance for SUB/TOC PAY.314 ** New option **

- This option looks to a date range of SUB.002 records and a percentage amount indicated to establish a cash advance amount for SUBS. A cash advance record is built to be recovered during the end of the month standard pay.

Annual Salary Report PAY.340TC

- New build file option to produce a file for download of annual salary for any group of employees. This is found in EMSFILES - special authority may have to be granted to you to be able to download the file. GREAT for budget download.

Employee Assignment Info PAY.345

- Termination record has new fields to accommodate ROE 'other monies'
- Added position status (from PRO.300) at top right of assignment along with existing PRO.300 position, date, FTE details
- If employee has Notes on File F23 is now reverse highlighted to make user aware that there are notes on file.
- HUGE, HUGE: If you are using position control, the account number from budget/position will appear on the payroll assignment screen to assist payroll in properly coding the employee. NOTE: IF an employee has multiple distribution refer to the position screen as only one account will appear at top right.

Compare Assignment + Alt F2 FTE with Absence FTE

- New Report that shows potential problems where absence accrual FTE does not match assignment FTE plus all effective alt assignment F2 FTE. This will occur for Para's (EA/IA) or others where your assignment FTE by itself is not reflective of a true FTE In these cases you should be updating the absence accrual FTE manually to reflect the collective FTE. Run this report frequently to ensure you are in balance.

Employee Assignment Pay Listing/File PAY.562 **Unbelievable******

- Use this program to print a current summary by employee of their annual salary, fte, account distribution, increment month and value, AND selected addenda values. This is similar to the annual salary file/report but formatting is better and there is selection to see certain addenda separated from the salary and in a columnar format suited for Excel. Very cool tool for budgeting.

Build Employee Seniority Hours PAY.865

- New selection 'Maximum Hours _____'. If left blank there is no cap to the hours that can be accumulated.

Mass Add/Delete addenda or deduction codes PAY.968

- In addition to selection by job code there is a new sub-select for position. Say your job code is teacher but you want to mass add an addenda PALLOW to all principals (which are identified only in PRO.300) ... This new feature will allow this to occur, ie: Select job code TEACH but then only look to those whose current position is PRINCIPAL.

Mass Inactivate Stale Employees/Assignments PAY.975 **Worth a Look******

- This option has been further fine tuned to separate the duties of a) inactivating old assignments vs. b) changing the employee status to 'N' and stamping an exist status code or year. Updating an exit status year will greatly assist your 7year folder clearing duties!
- At minimum each district should be running this at each yearend. If you are not comfortable with CIMS automatically handling inactivating leave it Report Only 'Y' and manually handle those you feel deserve inactivation. TRY IT!!!!

Budget Forecasting Module - Build Employee Deduction/Addenda File PBF.520

- Super option to create a file indicating employee assignment and position details along with which deduction and/or addenda codes an employee has. This does not load the dollar amounts - it creates a spreadsheet identifying which deduction codes an employee has making it vlookupable in an excel spreadsheet to fill current/inflated values in your budget spreadsheet.



BC Specific Items

Build Employee Census Data File BCP.504 ****New Item****

- As per requirements of the Ministry or Morno-Sobeco, this option produces a VERY COMPLEX file for employees regarding absence liability.

Session A - [24 x 80] File Edit View Communication Actions Window Help

1/18/07 FY 5 TAKE TWO INC. 15:47:32 QPADEV0003
CANEMS Build Employee Census Data File Ref: BCP.504P.01

LIMIT CENSUS DATA TO: FILE = EMSFILES/PBCP504(XXXXX00)
JOB CODES TEACH _____

DATE OF HIRE 1-8: 1 1 = Current Hire Date
TOTAL HOURS DATE RANGE 11/01/05 10/31/06 2 = Original Hire Date
VESTED SICK LEAVE BANK _____ 3 = Seniority Date
SICK DAYS USED RANGE 10/01/05 9/30/06 4 = Vacation Date
SICKT _____ 5 = Assignment Start
VESTED VACATION BANK _____ 6 = Misc Info Line 1
VESTED OVERTIME BANK _____ 7 = Misc Info Line 2
NON-VESTED SICK BANK SICKT _____ 8 = Misc Info Line 3

ONLY BUILDS A FILE - NO REPORT IS PRODUCED
F3=Exit F4=Index F5=Reset F12=Cancel

MB a 06/030
1902 - Session successfully started HP Color LaserJet 2500 PCL 6 on DOT4_001



MB Specific Items

Compare Emp Records from Ministry with District MAN.614

- Take Two and RETSD,WPG1 have been talking with Russell many many times to resolve how to eliminate doing the monthly reporting. Over the summer we worked out a plan to automate the process namely:



- ministry sends a file of what they have for info (monthly or as necessary)
- District uploads the file to CIMS and then runs MAN.614. This option compares the ministry records to our PRO.300 records and then generates a changes file for the ministry
- District downloads the change file (which reports all new adds, terminations, or changes to demographics and positions) and emails it back to the Ministry for them to load/update.
- If you want onboard - contact the Ministry. We are ready to go!

Build TRAF Records MAN.828/827

- For those that are now paying mid-month (more than one pay per month) there is a new option in your TRAF build 'UPDATE EXISTING MONTH RECORD' that is critical to append the traf value for the month with the second pay.



Sub Records Process

School Employee Grid/Address Listing PAY.993

- Report will print additional phone number (if district is utilizing alternate phone#) details on the address listing if employee# is not requested.

Sub/Teacher Maintenance SUB.002/001

- New ability on 'P' transfer command to be able to change the employee, sub, location, or timeframe
- SOMETHING TO CONSIDER: In Brandon - on 'A'dd users when adding the Sub entry can Fkey to workshops and register the employee in a workshop at the same time as doing the absence entry ... TOO TOO COOL!



Build File of Subs showing dates booked SUB.402 **New Exciting Option******

- Great option that shows every Sub (one line) along with 31 columns indicating what days they worked and for how long (according to sub.002 records)
- If you are using unavailable/available utility to block subs this information is also shown along with notes. You can use this in Excel to make your bookings!

Substitute Monthly Summary Report SUB.990

- Major enhancement to use the SUB/TOC calendar on file to consider with consecutive days. This is more effective than looking at the Teach Calendar. If you do not have a TOC/SUB calendar defined - GET IT DONE!

School Staff Listing SUB.998

- Enhanced to allow exclude location (eg: want to run all schools in date order, but board office and maintenance want to run in alpha order)

Sub Search Module SUB.305

- Enhanced search so that If your search is limited to only totally available subs Y and you have inputted several dates only subs available for all of the days will appear
- On Index of available subs show right on the index first portion of comment line (can view all extra details by selecting the sub) so user is aware of comments right at initial lookup

Mass Add unavailable date(s) for Sub SUB.702 **New Item******

- SUB.302 allows user to block a sub for particular date/time. For those cases where sub is unavailable say every Monday/tues/wed or is booking off for holidays or a term ... use SUB.702 to block dates without having to inactivate the Sub.



Notes for IT (cc: H/R)

REGARDING NIGHTLY NETWORK FILE

Brandon and Kelowna have both automated the employee to network process. Each night CIMS generates a file of employee changes based on PRO.300 information. The network program picks up the file (does stuff) - then provides back a file with employee# and email address to be updated automatically in CIMS.

To start initially, appropriate positions are marked YES for download and a complete staff file is created. From then on, the previous day file is compared with current day to establish a 'CHANGE' file for download at IT (changes means change to location, position, fte)

This could have HUGE impact on workflow for both H/R and IT. Right now the paperwork and timing for changes is cumbersome.