



July 2007 - Employee Payroll and H/R Enhancements Summary Release 11.5



This release contains many cleanup items (mass clear F2 rates, mass clear audit records, mass update front screen based on PRO.300). As you progress in years with CIMS also meaning years full of records/adjustments, it is important to consider keeping a clean house!

Offering Employee Connect to your staff in the 2007/2008 school year could be a very cool/progressive thing! A New release of Employee Connect is also available with this release of EMS which contains many great new features.

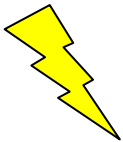
Release information should be reviewed as a group. At minimum, Payroll and H/R should meet separately for 1-2 hours to review this document. It is a really GREAT idea to have on-hand the current and last release notes for review and qualification.

Webinar to review this document with Take Two: **Friday September 21, H/R Session 10:45am** Central Time (8:45 in BC, 9:45 in AB, 10:45 in MB, and 11:45 in Ontario) and **Payroll Session at 1:00pm Central** (11am in BC, Noon in AB, 2pm in Ontario). Sorry Fort McMurray for going across your lunch hour.

Email a CIMS Report - EME.900 **CRAZY GREAT NEW OPTION **

- This option allows you to take any CIMS output (run any report) and email it. In running the option the user selects which report to do - CIMS will convert it to .pdf and then email it to whoever you requested. Often people email it to themselves ... then forward it to the 2 or 3 users they want and include other message information. This option works at all locations except Northern College and Louis Riel.

***** THIS IS A MUST MUST TRY OPTION *****



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.

Maintain Employee Email Addresses EIS.332 ** New Item

- Email addresses have always been maintainable in EIS.380/301 and PAY.345. For districts that have staff that maintain email addresses who should not have access to all the information that EIS.380 can provide - this new item is perfect! This option does not allow user to manage direct deposit email Y/N .. it assumes NO. **Payroll would have to activate if applicable.**

Employee Details/Hours Report for Term Teachers EIS.515 ** New Report

- Excellent new report to pick staff based on PRO.300 history (eg: all of my term teachers) and then on the report show all PRO.300 info (terms) as well as timecard history/hours worked. For term staff eligible for increments etc. this report will help to seek out those people.

Employee Report Writer - EIS.530

- Was a problem with endorsement dates not selecting properly / corrected
- Changed date formats to print YYYY/MM/DD .. were a few with YYYY/DD/MM
- Added additional fields 527 thru 529 to select Pay Assignment Income Tax Flag, CPP Flag, EI Flag to assist in double-checking.

Employee Academic Background Report - EIS.555 **New Cool Report

Select employees based on PRO.300 history (eg: all current teachers) and report on their academic background. A file is also generated automatically (EMSTRANS/PEIS555(userid)). Staff is only reported once even if they have multiple PRO.300 effective lines. This will help to answer questions like - with my current teaching staff how many have master degrees, who has a languages major

Mass Add Employee Evaluation Records - EIS.960

- New prompt to auto-fill a received date as well ... Then if there are a few pending - simpler to mass add the evaluation to the appropriate group (by PRO.300lines) and then remove the receive date for those few that have not completed.

Mass Update Front Screen Location & Primary Assignment Info - EIS.964

- Enhanced to update payroll location in addition to existing 3 location fields.
- ** All districts should be using this option monthly/biweekly for at least reporting purposes to verify the front screen information is accurate for employees. Reminder that it is the front screen location fields that are used for restrictions to limit some staff to only appropriate staff.

Employee Roster Formats - EIS.994

- Added the additional fields that have been available in EIS.995 for awhile but not in format definition. MAKE SURE TO review your EIS.994 definitions and update those where you want to auto-build contract records and print contracts!!

Employee Roster Reports - EIS.995

- On Wide format when skills are printed in long format print skill FTE even if 1
- Expand build file PEIS995D to contain FTEs to go along with the 10 skills
- On W format print short titles of subject codes instead of just 6 character code.

Employee Search Window - EIS.301W

- Previously, when you F4 for any employee the first PRO.300 line appeared as position - now the window shows position as at today.
- Previously, location was from front screen location - now it resolves from the current PRO.300 line information.

** For sites not using PRO.300 primary assignment and location appear in the window

Employee History - PRO.300

- NEW: When you are in history and you want to add an evaluation for an employee - be on the right PRO.300 line, ie: when you add an evaluation the location and position information for the employee autofills based on the history line that you are in. SO, if you are adding a future evaluation - 'C'hange on the future PRO.300 line then F23 to enter the evaluation.

H/R Mass email employees - PRO.525 ** New Exciting Option **

- Same feature as PAY.525 but now based on H/R PRO.300 records. You can mass email staff based on any PRO.300 selection for any date (past, present, future) and any field (record type, position, skill) .. Send an email to all my next year resource teachers reminding them of orientation night.
- ** This option will not automatically appear on custom H/R menus. Please contact Take Two if you do not see this item on the menu or need it to be added!

(Manitoba) Maintain MTS Disability Records/Profile - MAN.410 **New Item

- New item to maintain MTS disability information as per their form and print appropriate paperwork (overlay required MTSDIS).

The screenshot shows a PDF document titled "DISABILITY NOTIFICATION FORM" for the Disability Benefits Plan of the Manitoba Teachers' Society. The form contains the following information:

Disability Benefits Plan of the Manitoba Teachers' Society
1100-200 Graham Avenue, Winnipeg, MB R3C 4L5
Fax: 957-5347; Toll Free Fax: 1-866-216-9014

EMPLOYEE INFORMATION

First	CHERYL	Middle	HELEN	Last	AFINOGENOV
Address	525 ARCTIC DRIVE			Telephone	(204) 555-1213
City	WINNIPEG	Province	MB	Postal Code	R0G6R2
Employee's Job Title	TEACHER				

Date of Birth	Date employee last worked before disability began	Date earnings ceased or will cease
03 05 1954	30 04 2007	31 08 2007
DD MM YYYY	DD MM YYYY	DD MM YYYY

Is employee currently covered by the Disability Benefits Plan? YES

Annual Earnings 64,345.20

Find me who is absent report - PAI.504

- Enhanced to allow for more absence codes (7 instead of 5)
- Added a subtotal of absences by location if you select location as primary sort

Employee Envelope Print - Called form various programs

- Enhanced to prompt user to either print employee address or primary location on the envelope.

Mass Delete EMS Audit Records - PAY.974

- THIS SHOULD BE CONSIDERED at all districts. The records are becoming massive
- You can delete the records based on date range, and/or file. Further you can limit to just added or deleted records.
- A report is generated indicating what records have been deleted that you can file or coolspool pdf to store electronically.

Job Posting Distribution Lists - POS.216 **New Important Item**

- In addition to sending a copy of the Job posting to the schools and school admin, you can now produce distribution lists to include all appropriate individuals. If you do not want CIMS to handle the school distribution this also means that you can send based on your email distribution lists by adding that group ID to a distribution list. You can create many different distribution lists to accommodate teaching, vs, CUPE, vs admin etc.

Job Posting Maintenance - POS.220

- TWO New Notes areas (each 150 characters) available to allow your district more flexibility in describing/formatting your posting and reduce the need to setup descriptor codes. Each district has a custom posting print. If you want to take advantage of these new note fields on your print you will have to contact us letting us know where it should appear!
- Also new field added for Schedule Text (Have always had schedule code)
- Applicant Entry: Added new field for interviewer employee#
- Applicant Entry: Added new field for withdrawal date to record if an employee chooses to withdraw. Withdrawn applicants will still appear but with a *WITHDRAWN. Withdrawn applicants will not appear on screening worksheet, posting reports.

Mass Email to Selected Employees - PAY.525

- New select options to email based on all those that have applied for a particular job posting# and also based on date, ie: email all those that have applied after September 10th to say - we have received your application or whatever.

Job Posting Web Control Options - POS.224 / POS.225

- Lengthened URL fields to accommodate ridiculously long URL references

Job Posting Screening Worksheet - POS.520

- If extra column titles are not filled in (5 short fields), then report assumes you do not want the extra columns and instead will print long comment and short listed value.

H/R Workshop Maintenance - POS.320

- APPLICANTS: Give warning message when marking an applicant as REGISTERED if the number of registrations exceeds the workshop maximum and the workshop maximum is not zero

- **APPLICANTS:** Stamp time on adds as applicant time; will help with prioritizing applications and doing waitlists once online entry starts
- Added field for account .. preparing for the option - take everyone who has attended this course, create an addenda item and charge to account x... OR, create an absence record and charge it to accountx.

H/R Workshop Hours/Account Detail Report - POS.542 ** New Item **

- New option to produce a detail report of workshop registrants by name, workshop or position for a specific date range with workshop start date, hours and account for payroll absence verification. The report can be sorted in various orders.

Build Certificate/Endorsement Based on Workshop - POS.561 ** New Item

- New Item to be able to add a certificate/endorsement for all those that registered and/or completed a particular workshop, ie: add a first aid endorsement to all those that were at workshop x.

Mass Add/Copy Applicants to a Workshop - POS.565

- Added options to mass add by PRO.300 line type, position and/or skills
- Added options to mass add by PD course and expiration date range
- Added options to mass add by certificate, endorsement and expiration date range



CIMS Payroll Related Items

Employee Pay Detail/Summary Report - PAI.505

- Enhanced to sort details in Date order. Perfect pay detail report for ROEs and WCB

Mass Update Front Screen Location & Primary Assignment Info - EIS.964

- Enhanced to update payroll location in addition to existing 3 location fields.
- ** All districts should be using this option monthly/biweekly for at least reporting purposes to verify the front screen information is accurate for employees. Reminder that front screen locations are used for user restriction and front screen assignment is used to default in SUB.001/2

Employee Absences Earned/Used Profile - PAI.522

- To deal with OTBANK, profile is enhanced to report info from Sub Records and History
- Now provides build files for summary records and detail

Payroll Processor and Reporting - PAI.600M

- Adjust to change TEACH TTEACH TEACHT TEAC10 TEAC12 DAYS addenda to proper hours.
- Adjusted OPAI641 to include TOTAL EI, CPP, Tax and gross pay
- Teacher ROEs - problem with SIP for annual salary adjusting ROE amount for auto docks. Now checks contractual salary (+-100.00) to validate a contractual salary change
- Payroll Processor looks to EIS.380 (Email Y/N/W) to determine whether a remittance needs to be emailed, Printed, or nothing (web).

Employee ROE Print - PAI.710

- All Teacher ROEs (flag on ROE prompt TEACH=Y) are now marked as "W"eekly in the transmission file to HRDC

Payroll Assignment - PAY.345

- TEACH TTEACH TEACHT TEAC10 TEAC12 job codes can now enter F8 additional addenda time in DAYS ie: .5 days @ 182.10 (instead of hours). This ripples into TRAF and service to get proper service days/hours. Much easier to enter than hours
- If you use financial positions (position control) POS.200 - when adding a new assignment, the correct accounts will default based on account held in the position definition. Previous to this release the account showed on the assignment screen but did not auto-default.
- F8 Addenda - Can now turn CALC Y or N on addenda so you can force in a rate Xhours which does not equal the amount. Required for TEACH addenda where the rate * hours is not quite the amount (rate required to 4 decimal points). ex. 20- x 267.62 (should be 267.6165) = 5352.33- THIS NEW FEATURE SHOULD BE USED FOR ALL teach docks and/or adjustments to get service/EI hours correct
- DEDUCTIONS: Added fields for 3 more voluntary deductions to be displayed (12 in total) on the main deduction screen. Also will now indicate **MORE in vol deductions section IF employee has more than 12 voluntary deductions that are "eligible" for list (active).

Remove additional (F2) Rate Lines - PAY.972 **New Item**

- New cleanup program to select by job code(s) and date(s) and clear old F2 rate information. A report is produced to confirm what records had been deleted.

Pre-Printed Timesheet Listing - PAY.400 and PAY.401

- Enhanced to ELIMINATE GROUP for selection and instead allow selection by job code/location. Employees can now properly print on multiple locations. New sort option by location name instead of location number

Time and Attendance Maintenance - PAY.408 **VERY COOL**

- When absence record is copied to timecard from the sub records, the replacement/Sub name is now also being copied into the description. This new information will follow into history which should really help to see both sides of absence/time in the single record.

Certificate/Endorsement Listing - PAY.492

- Some CIMS districts are having custom prompts, code written so that their schools can utilize PAY.492x to produce their own sub lists (EA, Sub Teachers, Custodians, Clerical) to know who is available and what their skills are. Take Two can pre-fill in all the prompts so that the schools do not have any questions to answer - just simple push button to get results. If this is of interest - let us know.

Employee Absence Grid/List/File - PAY.596 **Check this report out

- Note: Many absence reports have been updated with *current to indicate whether/not sub records are included in the report. When you see *current* know that this means current/unposted sub records can also be included should you select appropriate dates.

- Added build file option ... EXCELLENT details and summary file options that per employee will identify all of their time taken for all/selected leave types PLUS current balance, total earned etc.

Change Absence History PAY.419

- System now audits who has added/changed an already posted absence and displays that user/date of change and the changed to/from on the absence history record.

Schedule of Payment to Employees - PAY.991

- New select to exclude particular addenda. This can be handy now in balancing vs. T4 reports or handling situations where NOT all pay should be considered.



BC Specific Items

PEBT Build File - PAY.709

- Employees can select to NOT submit SIN to PEPT - meaning PEPT assigns them a unique number. CIMS is smarter now ... for those that choose to do this you can now on the demographic screen use SPOUSE (input "PEBT") and SIN to change the number from SIN to xxxx - the appropriate PEPT number. When the transmission file is build for PEPT, it will use this number instead of regular employee SIN.



MB Specific Items

(Manitoba) Auto-Build Stat Pay based on previous earnings - PAY.344 *New Item

- To accommodate new government policies on paying stat pay, this new item will add an addenda and calculate the amount due based on previous pay/addenda as selected by the user when running the option.



Sub Records Process

Sub Maintenance SUB.001

- Adjusted index #7 (by rep#/date) and #8 (by emp#/date) to display 2 decimal places for the quantity ... Shortened replacement name by 1 character to fit
- INDEX #4: Added absence reason code to index details

Sub Teacher Maintenance SUB.002

- Adjusted index #7 (by rep#/date) and #8 (by emp#/date) to display 2 decimal places for the quantity ... Shortened replacement name by 1 character to fit
- **Currently at Brandon only:** New Workshop window to get account from the workshop so user does not have to be aware of those account numbers. This is very cool! If anyone else wants to venture into this - call us!!!

Absence Code Account Definition - SUB.011

- New 'Form Required' flag has been added to this definition. So, if you say mark absence code PD with 'Y' .. then when school runs weekly report SUB.997/998 - new column will print for any employee PD absence indicating Form Required. That will help to let the school know what paperwork should be included with the signed off weekly report. This is a tiny first step in our 2007 goal to work towards improving the absence paperflow/approval processes.

Support Absences (SUB.001) vs. PRO.300 Location Checklist - SUB.801 / 802

****New Item**

- ***** THIS SHOULD BECOME WEEKLY ROUTINE FOR ALL DISTRICTS**
- New compare report to confirm for any date range of Sub entry activity against the PRO.300 assignment details that location matches. This report is excellent to catch pre-done entries where employees are term/moving. It will identify ONLY differences between what the sub location says compared to where that employee is supposed to be according to PRO.300 lines.

Substitute Monthly Summary Report - SUB.990 ** CRAZY GOOD

- As the report is printing an employee's time, *RAT (rate change) will appear if that person has had a grade/step change in that date range. The report looks to the audit file to see if a grade/step change has occurred in that time period and if so, will indicate beside every time entry in SUB.990. This will help to identify whether you should be looking to adjust the rate on existing sub records.

Casuals Monthly Summary Report - SUB.991 **New Item

- New report identical to SUB.990 but to run for non SUBS (Casual, Support Time). Report shows same *RAT flag and includes a few different fields like account# to assist in accurate copy to timecard.

Support Staff Absences by Reason Code - SUB.992

- New option to allow page break by location
- New option to be able to select for absence code or reason code and ?? logic allowed for absence/reason code selection ie: VAC??
- Prints both time missed and time worked. \$\$Rate and amount still restricted to just time worked or time missed.

List of Timecard records in Sub that are not in Payroll History - SUBNOTWORK **NEW

- Identical to SUBNOTHIST - add this report to your list of things to do on a monthly/frequent basis. This report lists time worked entries found in SUB.001/2 that are not found in Pay History



Web Related Employee Options

Employee Demographics EIS.380/EIS.301

- Enhanced for Direct Deposit PAY slip options. Email has been there already as Y/N .. With the introduction of Web employee self service - 'W'eb has been added. 'Y' means email the paystub. 'W'eb means No printed copy, expect to view from the web (this option does not manage whether the paystub is available for view on the web or not). 'N' means produce a printed copy of the paystub.

Maintain Employee Passwords - EIS.331 **New Item

- Employee Self Service allows employees to create/manage their own passwords. If they have forgotten their password OR it is there first time signing in, the system will allow them to add a password providing they know certain information (SIN, Bank account#, name). This maintenance option allows you to be able to access/change passwords if necessary.

Maintain Employee Access/Web Setup items - PAY.324 **New Item

- Great new setup to allow the district to manage what web functions should be granted to staff (Change or Lookup) and to what tabs (workshops, payroll, directory ...)