



March 2008 - Employee Payroll and H/R Enhancements Summary Release 12.0

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: **Wednesday April 16, Payroll Session 10:45am** Central Time and **H/R Session at 1:00pm Central**. Mark this date/time in your calendar and plan for your department to get involved.



CIMS Human Resource Related Items

Location Definitions EIS.127

- New field has been added to be able to include/exclude location for Job Connect Product
- New location/school start and end time fields to use with SFE/TSSI Download

Sector Definition - EIS.126

- Added new field to be able to include/exclude sector for Job Connect Web Product

Position Code Maintenance - EIS.154

- Added ability to inactivate a position code to assist in being able to 'retire' a position code and have it disappear from selection (but not delete as history exists).
- New selection to be able to exclude the position code from showing in Job Connect

Body Part Definitions for Injury Maintenance - EIS.162 ****New Option**

- New option to be able to define body parts to assist in consistent and more convenient entry when describing an incident/injury in EIS.325.

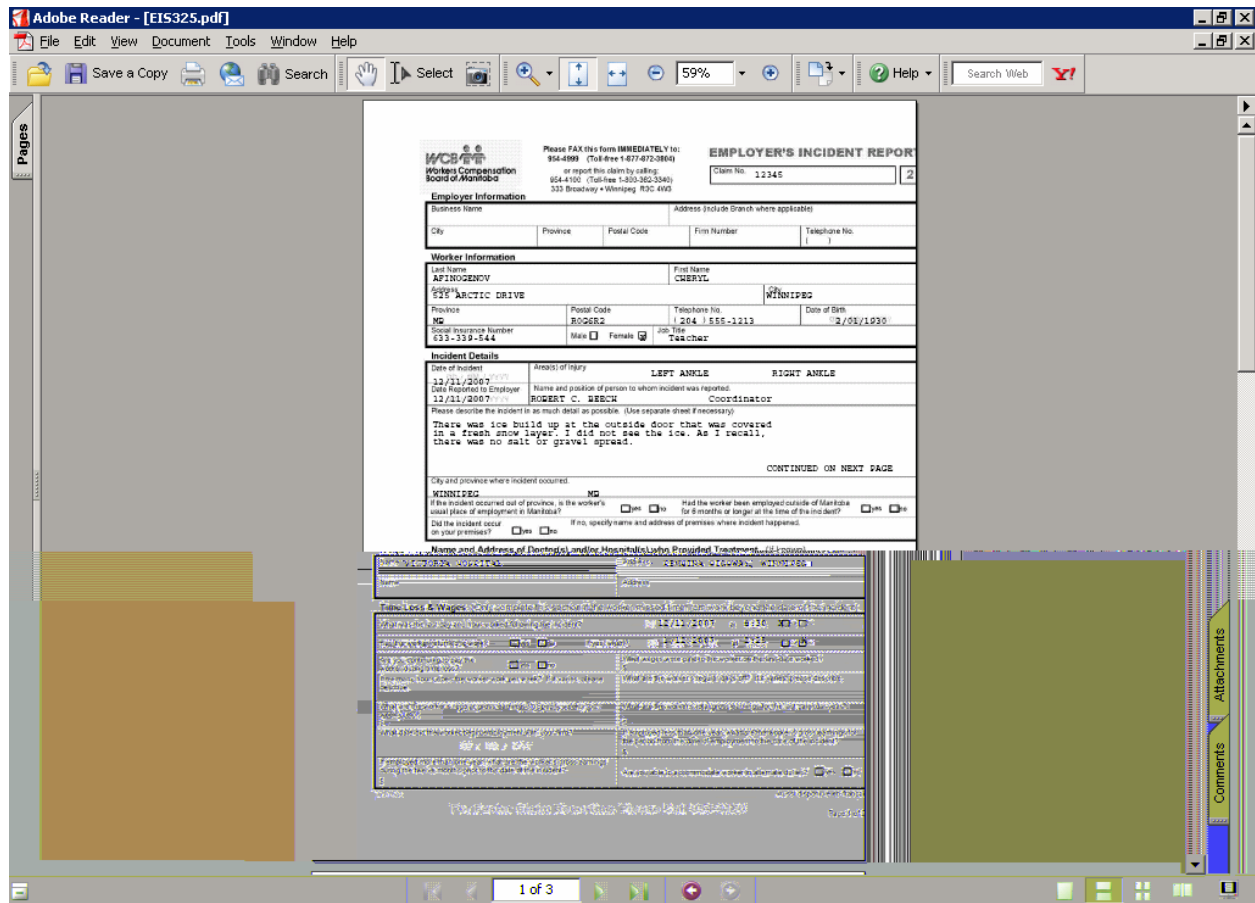
Create/Run your own report - EIS.260 and EIS.530

- Added position start time (#855) and position end time (#856) as report writer items
- If evaluation record is selected to print (#275) it now includes evaluation position and subtype fields in the output

Employee Accident/Injury Maintenance - EIS.325 ****Major Overhaul**

The goal of the changes to this option is to be able to maintain all information necessary for WCB claim and to be able to produce the paperwork from CIMS identical to the WCB forms generated by WCB.

- Rebuilt file and screen for additional fields required to satisfy the WCB Federal Form. In addition to recording the incident there is more 'structure' and there are additional screens of input to record treatment information, safety measures taken, employee comments, WCB administrator comments, return to work information ...
- Redesigned screen to fit new fields
- Added WCB print option with overlays to match what WCB is expecting



Employee Connect - User and Password Maintenance - EIS.331

- Added last signon, email, and number of signons (count) so district is aware of who is signing and how often.
- New ability in Employee Connect to select signon by employee email address or by employee initials/number as userid (PAY.324 defines this).

Employee Maintenance - EIS.380

- Employee Experience: Added additional line file/screen to be able to maintain out of district history of experience (used in Web Job Posting for applicants to record history of work).
- Employee Academics: Added ability to record double major/minor information and added a new report (EIS.555) to search/identify staff based on academics. Also added an information verified and comment fields. If district has verified the academic record - then applicant will not be able to update it and district will know they have confirmed/accepted the record.

- Employee References: Added a new screen of information to record applicant/employee references (to be used in Job Posting for applicant to list employer references).
- Access Employee Accidents - New prompt added to EIS.380 so user can go directly to EIS.325 accident/WCB information.

Employee Roster showing position history Report - EIS.514

- Added selection by position(s). Previously there was a select only by record type. Originally intended to say - Print all teachers on leave (type LT) and show their work history for the past two years - to assist in placement of returning leaves. Now offers more flexibility for any request where you want a certain group of employees and show ALL history for those employees.
- New auto-file gets created EMSRANS/PEIS514

Term Employee Detail/Hours Listing - EIS.515

This report selects employees based on their PRO.300 details (e.g.: select all current term teachers) and then displays payroll timecard history for those employees for whatever date range you select. This can assist in situations where your term employees may get treated differently based on hours/consecutive work.

- Enhanced to allow selection for single employee
- Enhanced to allow selection for letter type

Employee Academic History Report - EIS.555 ** New Report****

New Report allowing user to select employees and then show academic history for the group selected. OR, user can select group and look for all those with particular degrees or majors

- There is a build file option so that you can bring these details into Excel and manipulate or pivot for more statistical purposes.

Employee Evaluation Listing - EIS.560

- Report now shows difference between evaluations completed versus closed/cancelled. If the evaluation was closed it will now appear as '*' so reader is aware of the difference.
- Added new option to sort/break by evaluator

Employee Evaluations Error Report - EIS.562 ** New Report****

- New option to produce a report of open evaluations where the location, position and/or sub-type on the evaluation don't match the information on the effective (based on due date) PRO.300 record. This should be run occasionally to handle forward dated evaluations where history changes.

Mass Close Employee Evaluations - EIS.961 ** New Option****

- New option to mass close unreceived/unclosed evaluations of a specific type that were due on or before a specified date
- In addition to the error report (above) this should become standard annual (or as you see fit) process to close out old evaluations that will never be received. There is a report only 'Y' so user is aware of what will be occurring before actually running the operation.

Employee Roster - EIS.995

- Print START and STOP TIMES (from PRO.300) on W format
- Check for duplicate lines now includes replace/account field
- Changed location sort order to be alpha portion of location only NOT number portion so report will be alpha by location name *****POTENTIALLY HUGE***** When a user selects to sort and potentially page break by 'L' it will not longer go by location# (001 then 002 then 003) - it will go based on the location description rather than number
- Added option to include/exclude comment (new 'Comm?')



Employee Roster (restricted) for Schools - EIS.995S ** New Report****

- District can setup a format 'ZSC' indicating what employees and what to show. When a school goes to run EIS.995s it restricts them to the ZSC format, and their location. It allows them the flexibility to print out their staff rosters for any effective date .. E.g.: who will my staff be for next year?

Print Employee Letters - PAI.580

- Re-formatted the letter slightly to accommodate more text on a single page. This does not affect customers with custom letter formats (Kelowna, The Winnipeg School Division, Fort McMurray)
- HUGE HUGE: Added ability for you to specify a *page break in your word document. This should help immensely at ensuring you are in control of the page break.

Employee Profile - PAY.510

- Standard and custom profiles using ACADEMIC file were rebuilt but new fields (namely second major and minor codes plus verification field) were NOT added as districts would need to review their formats and indicate how/where they would want to include the extra information. **IF YOU DO PRINT EMPLOYEE PROFILES** and you want academic information included, review your current profile and contact Take Two as to where you would like the new information included.

Employee Age Projection - PAY.519

- Corrected logic for job code selection to not include blank matches
- Added logic to check both primary assignment AND secondary assignment to include appropriate staff.

Employee Seniority List - PAY.520

- Added option to base seniority on seniority hours and be able to specify the year of the hours to be included
- Changed secondary key for hours seniority to be in descending order

Employee Absence Grid Listing - PAY.596

- Enhanced to allow report by absence reason (previously only totaled by absence code)

School Employee Grid List - PAY.993

- Added option to "address" list to print ONLY emergency contacts; excludes employee address and phone number information. Indicate an O in PRINT EMERGENCY CONTACTS
- Print contact priority information for emergency contacts
- If contact priority is H then print emergency "address" fields as that is where health details are being indicated

3/17/08 FY 5 TAKE TWO INC. 11:57:57 QPADEV0004
 EMS Employee Emergency Contacts Information Ref: EIS.321 .01

Employee: 1191 AFINOGENOV, CHERYL H.

CMD	Name	PTY	Relationship
-	TOP		
-	1 Afinogenov	Peter	1 Husband
-	2 Brown		
-	3 Health		

3/17/08 FY 5 TAKE TWO INC. 11:58:22 QPADEV0004
 EMS Employee Emergency Contacts Information Ref: EIS.321 .11

Employee: 1191 AFINOGENOV, CHERYL H.

Emergency Contact:

Name: First Middle Last
 Details Health

Contact Priority: H

Address Information:
 Address: EPI-PEN allergic to peanuts

City/Prov/Post: _____
 Country: _____

Home Phone: () _____
 Alt Phone: () _____ Ext: _____

Relationship: _____

Mode: Change Cancel? N

08/020
 HP Color LaserJet 2500 PCL 6 on DOT4_001

CIMS Nightly Network Job to show Changes to employees - PAY814C

- Several districts are now effectively using this automatically generated file to reduce the paperwork needed between H/R and I/T to create network Ids, email accounts, network accounts etc. We have a document that describes how the process works. If your district is still doing things manually in this regard - consider talking to us about automating.
- There have been significant changes to the logic and to the file. We know that Brandon and River East Transcona are already utilizing the new logic. ... not sure if other districts are using this nightly job (Kelowna, Louis Riel) .. If you are contact us for the new documentation.

Job Posting Maintenance - POS.220

- New Print Awarded option (2). CIMS is expecting an overlay on the system called AWARD and will automatically print an awarded document that can be posted on the bulletin board that indicates posting summary information and who the posting was awarded to.

- New applicant screen added for the posting. This will identify for the online applicant what information must be filled in, i.e.:
 - What CIMS categories to inquire about (Declarations, CRC, CAR, citizenship..)
 - Certificates (first aid, teaching certificate) and effective dates
 - Skills (as defined on EIS.180)

3/17/08 FY 05 TAKE TWO INC. 12:08:46 QPADEV0004
 CANEMS H/R Job Postings Maintenance Ref: POS.220 .12

Posting CAS/RELIEF SEC

Addl Title ADDITIONAL TITLE

Skills MATH

FTE 100.0000

Applicant Categories: APPCIT APPGRP

Pick Multiple: Y

Applicant Certificates:

Applicant Skills Type: 3

Appl Instructions/Disclosure:

Applicant Teacher Y/N: N

Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel

MA c 06/016

1902 - Session successfully started Microsoft Word - rpt200803ems.doc HP Color LaserJet 2500 PCL 6 on DOT4_001

H/R Job Posting Applicant Profiles – POS.526 ** New Report

- New report to print for an employee or for all/selection of a particular job posting and include all applicant information (academic, history, certificates, skills..).

Special Note: Job Posting Menu has been re-done. Previous to this release all items were on a single menu. Now the menu has been broken up between setup, maintenance, and reporting.

Workshop Maintenance - POS.320

- PRINT: Added "P" command to print basic profile of workshop; mainly for employee web so employee could print workshop information
- Changed indexes to be 2 lines and show workshop title and TIMES on 2nd line to assist in finding the right workshop without having to go into it.

Workshop Attendance vs. SUB.002 absence record report - POS.564 ** New Report **HUGE****

- New report to compare workshop applicants to sub record absences SUB.002. This is a great comparison between workshop registrations/attendance and what was recorded in the absence system.

Mass Change Old Job Postings to Web Access 'N' - POS.970 ** New Item****

- New item to be able to turn off previous year/very old postings so that they are not available for view on the web even when someone selects active postings 'N'.

Mass Email Employees based on PRO.300 selection - PRO.525

- Enhanced to allow selection based on skills (i.e.: all of the resource teachers)



CIMS Payroll Related Items

Time and Attendance Listing - PAI.501

- Added grand totals by absence at bottom of report

Payroll Cheque Listing (Regular and Voided) - PAI.504

- Enhanced for voided cheques to show all 3 dates - original cheque, period end date, and transaction date - to assist in G/L balancing

Payroll Account History Report by Account - PAI.516 ** HUGE ******

- New option to replace QRYACCT that produces a report in summary/detail and a detailed download file of payroll account distribution history by account. Option can be limited to cheque date range, run#, employee, job codes and/or account

Payroll Processor Changes - PAI.600M

- At the time a payroll is executed, the OPAI625 report(s) are automatically converted to .pdf and now stored in a folder on the iSeries that is retrievable and printable as a document. The goal is to get districts used to electronic filing with the intention of not printing the register. There is a new PAI.609 to retrieve the documents.
- If employee is "WEB ONLY" for payroll notification then when the payroll executes and email is sent indicating payment has been made - check the web.
- Made further date chequing changes to assist with not making a mistake, i.e.: Cheque date must be within year you are in based on FY and transaction date must be within financial fiscal year date range
- **HUGE HUGE:** Added a new PAY.134 item to handle grant like situations where you want the benefits to be charged to the same account as the employee (not the hard-coded deduction values).

There were many custom changes made in the payroll processor. Check below for changes that pertain JUST for your district:

- FMCM Setup new cheque format
- WINNI Changed font on amount to 5943 point size 12 to print \$ with full line through it as per bank specifications
- RIVER Removed \$ from amount field on custom cheque print as pre-printed on cheque PAY.465 DOCK for Days ONLY would post @SERVC but not post in PPAI713 for hours.
- KELOW Changed direct deposit print to include absence current balance PLUS *Pending new amount.

Payroll History image Lookup - PAI.609 **** New Exciting Option ****

- New option to display actual run# processing details and view the PDF cheque register produced during the payroll run. This includes register (OPAI625), wage summary (OPAI631) and deduction register (OPAI681). This is fundamentally different than re-printing the reports. When the payroll runs, reports are auto-filed. When you need to review the reports you can look, search, browse, print from online copies which should save on filing and assist on more easily finding information.

3/14/08 FY 06 TAKE TWO INC. 15:49:42 QPADEV0004
 CANEMS Payroll Run# History & Register Image Lookup Ref: PAI.609 .11

Payroll Run# 985 Processing ID TEACHER
 TEACHER PAYROLL

Group OR Employee 1191 Cheques Were Dated 12/31/06
 For Period Ending 12/01/07

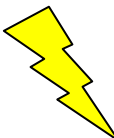
Financial Member TAKE206 Transaction Date 12/01/07

Job Codes TEACH

TEACH	TEACH	TEACH	TEACH	TEACH	TEACH
228.51-	228.51-	221.51	FELING TEACH	788.09-	
88-81-	88-81-	106.77	LIMIT TEACH	202.63-	
88-81-	88-81-	80.00	RGVF TEACH	216.67-	
00	00	80.00	RMCP TEACH	.00	
00	00	20.00		.00	
Total Pay			4,786.67	4,648.92	28.00
Total Deductions			1,508.94-	1,508.92-	220.28
007 T O T A L			3,208.31		

MENT - TEACH TEACH SGT Beg Bal Earned Absent Adjust Pa
 - TEACHER P TEACH SICKT 74.0000 .0000 .0000 .0000

Mode: Lookup



Payroll Run Summary Listing and Build File - PAI.644 **** New Option ****

- New option that produces a report and build file summarizing payroll run information by type and code - one line per pay run. This is an ideal balancing report showing everything in summary that occurred on that payroll. The Winnipeg School Division is using this as a budgeting tool.

Payroll Run Summary Listing by Employee - PAI.645 ** New Option

- New option to build a file and a report of payroll run summary information by employee for a specific cheque date range and group of employees. Program can be limited to specific job codes, addenda, deductions and pay tables and can include/exclude pay, addenda and deductions. This is an extension to PAI.644 providing one line summary detail per person for that run. Also excellent opportunities for pulling this information to Excel for further analysis.

Payroll Deduction Listing/Register

- Added employee address information and phone# to download file

Employee T4 Print

- Added new error report for missing SIN numbers
- Added new box 85 as per CCRA for employee paid benefits

Payroll Processor Re-Map Deduction & Benefit Accounts - PAY.134 ** New Option

- New option to define payroll processor accounts to be remapped. Used for grant accounts, etc. where you want the pay and all related deduction/benefits (CPP, UIC ...) posted to a grant account (currently used by delta and seven)

Annual Salary Report - PAY.340TC

- Added FTE total to bottom of report

Auto-build STAT addenda from previous pay - PAY.344

- Enhanced to allow ALL years (instead of just previous year) so you can mix and match pays across the yearend.

Pre-Printed Time Sheet Listing - PAY.400

- Corrected date defaults when start date crosses over calendar year end

Pre-Printed Time Sheet Verification - PAY.401

- Correction for selection of absences to restrict to proper job code (instead of all absences for the employee)

Auto-Build TOC Benefit Addenda - PAY.454

- Enhanced to print a "*" for employees who have paid into a deduction/benefit
- Corrected to allow F4 for deduction code field. Validate deduction code specified if not blank AND not specified with question mark logic

Auto Timecard Builder - PAY.808

- Enhanced to allow timecard to be built for a single employee. This may be a little advantageous over just doing a PAY.408 because it looks at all of the account distribution lines and F2 lines to create the timecard.

Mass Inactivate Stale Employees - PAY.975

- Include SUBLST value on report to assist in knowing non-worked SUBs who may still be active on the Sub List
- Exclude employee numbers 995-999 from inactivating



BC Specific Items

Build IPAS Address (20) Bargain (40) Files - BCP.840 & BCP.841

- Change to select assignment status (ASACTV) not equal to N instead of equal to Y; will include people on leaves, etc. EMSTAT must still be a Y



MB Specific Items

Teach/Sub Total Days taught report - MAN.714

- New prompt/select to be able to include Employee SIN or not



Sub Records Process

Sub Entry - SUB.001/002

- Added new F option to duplicate dates (used to just be Yes or No) to automatically fill duplicate date fields with next 9 Mon-Fri dates based on current record's date. The autofill records also displays day text (Monday, etc) next to defaulted dates so user is aware of the dates and days without having to refer to a calendar.

SFE Compare Finished Records to CIMS SUB.002 - TSI.502 **** New Report**

- New option to compare download TSSI/SFE finished records to the SUB.001/SUB.002 records for reconciliation purposes. This is huge, i.e.: to be able to confirm that your SFE records are all accounted for in CIMS.
- This is not just a reporting option, i.e.:
 - An export file is generated out of SFE
 - A program is run against that file to put it in a format acceptable for upload to CIMS
 - Upload the SFE file to CIMS
 - Run the compare

