



November 2008 - Employee Payroll and H/R Enhancements Summary Release 12.5

This release has two HUGE items – being able to create A/R entries for sub charges from Sub records automatically and introduction of online requests for employee leaves. There are other convenient enhancements and continued improvements to job postings and workshops to compliment the surge forward of online apply and online workshop requests.

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: **Tuesday November 18th, 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

Employee Accident/Injury Maintenance and Print (EIS.325)

- In the past the printed profile reflected what was necessary in Manitoba (WCB Form). An overlay and profile is now also available to meet the WCB requirements of Alberta

Employee Information H/R (EIS.380)

- In the references section additional title/relationship field has been added to allow the applicant to identify relationship of this reference (employer, friend...)

Employee Evaluations Listing (EIS.560)

- There was an issue with follow-up code not updating properly for prompt on listing
- Added a new option to select multiple employees – to allow a listing of selected evaluations and status just for particular employees
- Updated the email to evaluators information to make things clearer to the evaluator

Build Emergency Contact File (EIS.621) * New Item**

- Employee Connect allows employees to update emergency contact information (up to 2). School clerical can also use CIMS option EIS.301L to maintain emergency contacts or particular health concerns (Contact Priority H). The purpose of this new item is to be able to download for a particular group of employees (new hires, all active staff) and provide the necessary info to create a mail merge indicating what information is onfile and to request updated information.

Employee Roster/FTE Listing (EIS.995)

- Added a new format #9 (hours oriented) that resembles existing format #5 (Name, Position, Sub Type, Status, Hours, Comment, Date, Subjects, Subject FTE) EXCEPT – Does not print comment and limits to just 7 subjects and subject FTE so that everything appears on one line instead of wrapping across two lines per person.

School Configuration (EIS.996) and Monthly Board Report (EIS.998)

- Just updating all districts on how successful districts have become in providing accurate school budget detail/worksheets to schools (EIS.996) and a very professional report to the board indicating new hires, retirees, changes in contract (EIS.998) directly from their H/R records. Brandon, The Winnipeg School Division, and River East Transcona are those that we know of. We are subtotaling creatively to match each districts needs, adjusting fonts and font sizing to make them appear as a word document, and including/excluding staff according to who you need to show on the report VERY VERY COOL.

Print Employee Letters (PAI.580)

- Added feature: If format starts with 'NS' then the employee# will print
- Added feature: If format starts with 'ET' then teacher certificate#, phone number and email address will print

Employee History (PRO.300)

- Enhanced date usage. We all know that date 12/31/29 is the date we use to mean NEVER ENDING. There is an additional date that you can use 11/11/29 that indicates UNTIL FURTHER NOTICE. Employee letters and rosters know if they see 11/11/29 to indicate until further notice rather than to print the date. Previously we had used 11/11/11 to indicate this but since this date is getting closer we decided a new date was necessary. If you had used 11/11/11 and need records mass changed to the new 11/11/29 then let us know.

Introduction of a new Module – Employee Leave Request and Processing

****WAY COOL****

In the next month(s), online employee leave requests will be available to all districts.

- In CIMS this means defining leave type (new option EIS.316).
- An additional tab in employee connect will be available for employees to request a leave
- An additional tab will be available in Admin Connect for Supervisors and Admin to review appropriate requests and approve
- Additional CIMS options are available to approve requests, and report on requests
- An additional tab in employee connect will allow employee to complete applicable leave information (say PD and conference leave) by attaching documents and confirming costs by type.

Employee Audit (PAY.190)

- Changed sort order from oldest to newest to now newest to oldest. With some employees it meant several page downs to find current change information ... now the newest records will appear at the top



Mass Email to Employees (PAY.525)

- Added new select by employee category and/or category value (email all those new hires, those with expiring criminal record checks)
- Removed Workshop and Job Posting options as they are available in H/R email options POS.525 and PRO.525

H/R Job Postings (POS.220)

- Enhanced online apply by allowing per posting to indicate what information is required to fill in in order to successfully apply (experience, skills, required documents) ...
- Added a new field within a posting 'Alternate PRO.300 Position' so that you may advertise the posting with a particular position and then as you place an employee into that position in PRO.300 have the system automatically indicate an alternate position than what is on the front screen of the posting.

H/R Job Postings Report (POS.521)

- Added option to print unfilled postings only – those postings that have no-one with a hired date.
- Enhanced report to indicate WEB next to those applicants who have applied online
- Added additional prompting to print applicant details based on short list (blank, or non-blank)

H/R Email messages – Job Postings (POS.525) ** New ITEM **

- New option to send email messages based on postings and status of postings (all those who applied between a certain date range, only those marked with a certain short list code, those that are being interviewed, etc)

H/R Email Messages – PRO.300 Lines (PRO.525)

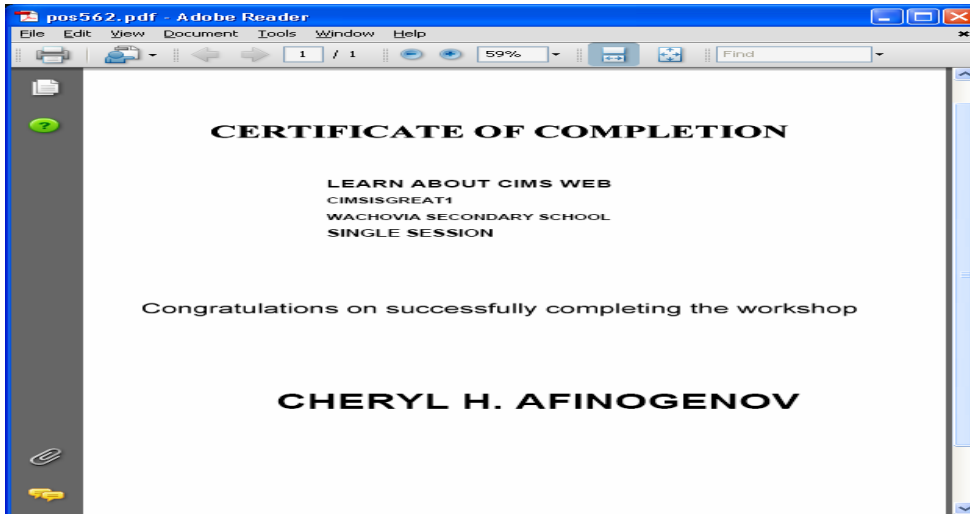
- Added new select by PRO.300 status
- Added new select by category and value

Job Posting Applicant Profiles (POS.526) ** New with Web **

- Report allows online applicants to print what is onfile once they have applied for a job. Profile will indicate everything that they have filled in and highlight which items were required.

Print Workshop Completion Certificates (POS.562) * New ITEM ****

- New option to print completion certificates for employees based on workshop records. The information merges with overlay WSCOMP (which each district may modify). The overlay can contain logo/borders .. whatever you wish.



Workshop Attendees versus SUB absences report (POS.564)

- Added SFE job number to report to assist in knowing how the absence was entered

Employees (based on PRO.300) and when they were last paid at a certain Job Code(s) (EIS.516) ** New Item **

- Use this item to lookf to inactivate Casual records according to PRO.300 lines. For example – you open up an annual TOC/SUB line to identify any Sub contract. At the end of the year, use EIS.516 to confirm who has been paid/not and consider inactivating records or knowing who to keep active.



CIMS Payroll Related Items

Payroll Cheque Lookup (PAI.420)

- Changed Index/view to include period end date and run number to provide more information rather than having to go into each cheque separately to see it

Time and Attendance Listing (PAI.501)

- Added totals at the bottom of the report for inactive employees to help reconcile totals from different reports that you can and cannot control whether all or just active employees are appearing, i.e.: in CIMS you can run absence reports by absence code that will run for all absences regardless of whether is currently active or not .. then other reports you run by employee will select first based on active assignment and then show absence totals

Employee Time Absent/Worked Detail Listing (PAI.502) **Very Nice**

- Added new select by Tag (include/exclude) so you can run report by groups of employees that are not achievable by selecting by job code or location (e.g.: Business department or IT Group) AND you can also select to exclude a group from the base reporting (e.g.: Superintendents group)
- Added sub-call system call# on lines so reader can identify which absences were entered by subcall system and/or manually
- Added ability to print reason totals at bottom of report

Find me 'Who' Absence Report (PAI.504)

- Enhanced report detail to show 'D' if the absence entry had a dock applied to it

Employee Pay Detail/Summary Report (PAI.505)

- Added hours total at bottom and for each employee

Payroll Processor (PAI.600M)

- Now adding the absence code at the end of the dock description to help identify which absence caused the dock
- At pay processing time 3 new additional reports are automatically being imaged – OCSD691 (Employee Experience), OPAI6541 (cheque register) and OPAI6542 (cheque register direct deposit) that can be viewed in PAI.609.

Re-Write Actual Payroll Reports (PAI.603)

- During a re-write there is a new option to be able to re-create images (Re-create PDF reports). This means that if you want to image old and previous year payrolls – go for it.

Employee Audit (PAY.190)

- Changed sort order from oldest to newest to now newest to oldest. With some employees it meant several page downs to find current change information ... now the newest records will appear at the top

Mass Email to Employees (PAY.525)

- Added new select by employee category and/or category value (email all those new hires, those with expiring criminal record checks)
- Removed Workshop and Job Posting options as they are available in H/R email option PRO.525

Build Employee Seniority Hours/Time (PAY.845)

- Added option to build file which includes employee location(s), current hire date, original hire date, seniority date, and seniority# information. This is an excellent file to assist in reviewing/analyzing annual hours given according to payroll history for a prescribed period.

Mass delete EMS audit records by Date (PAY.974)

- Added new select by exit status – in addition to all of the existing options, now also allows you to remove all audit (PAY.190) for all retired or expired employees

Mass inactivate stale employees/assignments

- Enhanced the report to show active or future PRO.300 lines if they exist for the employee

Mass Upload Employee email addresses (CUSTOM)

- Many districts are providing a nightly .csv file to the AS/400 that is automatically processed to update employee email addresses for CIMS. This has allowed the district to more easily move forward with email (PAY.525) and auto-notifications. Contact us if you are interested.

Create A/R Invoice based on Sub Records (SUB.910) ** New ITEM, Huge Potential **

- New field available on SUB.001 and SUB.002 for the Board Office level (Not to entering being done by restricted users) to indicate A/R Customer number so that records can be accumulated and then automatically create an A/R Invoice.
- New item SUB.910 that accumulates SUB information to create A/R Invoices.

A/R Customer Account	Locn	Start	Employee	SUB/Replacement	Amount
Ref: SUB.910 TAKE TWO INC. Date: 10/22/08 BUILD A/R INVOICES FROM SUB.001/SUB.002 * REPORT ONLY * Time: 16:46:39 DATE RANGE: 1/01/01 - 10/22/08					
ATOM "AA" KINGMINERS	257 004	SEP07/05	SIMON, VIRGINA	SCHULTZ, EILEEN	104.71
ATOM "AA" KINGMINERS	257 005	SEP07/05	DICAIRE, JOSHUA R.	DAZE, JOANNE	52.36
INVOICE TOTAL					157.07
TOWN OF DOG RIVER	167 006	SEP08/05	ZHOLTOK, PATRICIA	OHLUND, ADELA Y.	104.71
INVOICE TOTAL					104.71
TOTAL FOR ALL INVOICES					261.78



BC Specific Items

BCPSEA Project

- BCPSEA in conjunction with the ministry has initiated a HUGE data collection initiative that will mean all districts in the province providing extensive employee information quarterly to a web exchange database. There are several phases to the project. The first testing will begin in November with the expectation that by September everything will be moving smoothly. A manual is available explaining the new process, setup, and build options.



MB Specific Items

**** None**



Sub Records Process

**** None**



Employee Connect - Web

- Reformatted employee directory to remove phone#, limit to location
- New tab added so employee can see jobs applied for and review his applicant profile
- Added new Jobs <tab> that automatically takes the employee to the postings website and allows them to apply online without re-requiring sign-in information
- Employee connect now shows time worked and time absent details
- Employee connect now shows absence summaries and subtotals by reason
- Enhanced signon screen and now allows for three different Ids – Employee#, Initials plus Employee#, or CIMS Email address
- Added additional <HELP> for forgot/create password
- Changed Paystub preview to include all cheques not waiting for the cheque to hit deposit date. That means that cheque remittance will be available as soon as you have run the pay (same as email going out).
- Districts can control whether they want staff to be able to update their email address and paystubs by web fields (PAY.324)
- Added new <tab> for employees/subs to be able to update will work at location and availability for those districts using our CIMS sub search module



Job Connect - Web

- Major enhancements to online apply to continue to make that process as simple and accurate as possible. To date 3 districts are using online apply for applicants to apply for postings.