



July 2010 - Employee Payroll and H/R Enhancements Summary Release 14.0

Many customers may already have the majority of these changes loaded/active. There were significant changes to email, workshops, job postings, and employee leaves (both maintenance options and reporting). For payroll it was T4 Efile year and there are HUGE improvements to absence reporting and statistics.

We are anxious this year to see districts grow in use of the additional modules (image, workshop, job posting, automated leaves). The changes in regular CIMS as well as with EmployeeConnect and AdminConnect have been incredible!

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: **Thursday September 23rd, 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.

DOE.900 **Reminder** – This option replaces DOWNEMS ... It will take any CIMS report and drop it to a file so that you can open it in Excel. You would never do this with EIS.995 or EIS.530 as these reports already have a build file option ... BUT ... if it is some other CIMS option that does not have a build file option – then DOE.900 is an excellent utility to take that report and drop it to file EMSTRANS/PDOWNOUT(USERID) so that you can open it in Excel.

ADMIN CONNECT Userids by Position/Location – PRO.100 ** REMINDER**
The goal was to not have to create and maintain a link between the employee# and AS/400 Userid. We should be able to tell based on your position code, location, and subtype what your ID would be. In that fashion as employees change – this would mean no additional maintenance. PRO.100 sets up for an automatic move to Admin Connect from Employee Connect without having to re-signin. It is some districts' intent that Employee Connect be the primary access point for CIMS Web – as this eliminates Userid and password issues and simplifies launch. PRO.100 can make this happen for you.

Control Access to Employees – RES.000 **REMINDER**

- New Category expanded to include 'F' employee Folder
- New prompts per category to include user ability to Add,Change,Delete per category. This is all necessary setup to be able to control what folders a user has access to and what can be done within the category. It also allows you to control what images employees in employeeconnect can see (HIR letters, CERTificate completions, T4s)



CIMS Human Resource Related Items

Location Code Maintenance (EIS.127)

- For districts that do not use student and want to populate EIS.996 so that based on location it will come up with potentially different top notes – a new category for School Configuration text field has been added (Currently Brandon is the only one using this feature)

Endorsement Codes (EIS.132)

- New link between position skill/endorsement (eg: RESOURCE), position number, and program type (within budget position definition). So if you have a position number against a program and then identify a skill and position number on a PRO.300 line – a new report POS.998 will identify any discrepancies. This will help to eliminate people being assigned to the wrong position number.

Evaluation Type Codes (EIS.207)

- New approving/verifier userid. This automates the evaluation process, ie: Administrator in AC attaches the evaluation, HR confirms and accepts the evaluation – and then automatically thru AC – those evaluations pertaining to the verifying ID will show up on Employee Main for those staff. It will continue to haunt that main screen until they mark it verified.

Employee Leave Maintenance (EIS.316)

- Enhancements on 'P'rint - do not print expense information headings/totals if there are no expense categories in the leave type – include absence code and reason code descriptions – showed cancelled if it has been – show completion type descriptions
- Fixed Index selection by seeing those approved but not completed as it was not working or limiting to status as they should have
- Added new Index options to be able to easily identify those denied and those approved and not completed, also by req date.
- Also added Index by Approval date to be able to see what work you have completed today in approve/deny.
- Added grand total estimate/actual on the EIS.316 expense screen view

Employee Leave Report (EIS.538)

- Added new column to show up to 2 completion codes (previously showed just the first)
- Added Sub Req flag to report
- New selection to include committee details (Yes/No) for those types of PD that go thru the online committee process
- New selection on report to limit to just those of a particular completion code
- New selection by Job code(s)
- New option to include comments Y/N
- New option to choose to sort by employee for by leave code/employee
- New option to select by leave amount > x days to focus on the longer leave requests
- New pre-define format EIS.738 added to create standard definitions

Employee Leave Committee Grid Report (EIS.539) * New Report**

- New report to produce a grid of leave requests that require committee approval. Grid shows points received per committee member and summary of request.

Employee Information (EIS.380)

- If email=Y you cannot leave the email address blank
- Enhancements on evaluation view to show attachments are onfile, not allow date edits once attachments are onfile. Also changed document storage to hold the location number as part of the document name.
- NOTE: When you are in an evaluation it indicates if attachments are onfile.... SO .. if you remove an evaluation make sure to also go into folder and remove the attachment. The system will not automatically remove attachment(s).
- New demographic fields have been added (F6=demog) to hold Legal last, middle, first name. Previous to this release just had legal first name. Report writer (EIS.530 and T4 print accommodate new legal name)
- New alternate email available (F6=demog) to record a second email address. Employees can also edit this second email address in EC. No CIMS email send options listen to this alternate ID – email is always only sent to the primary address.

Evaluation Listing (EIS.560)

- New select added to be able to print Evaluator (or not)
- Added additional *ATTACH* and “APPROVED” details for documents onfile and if the evaluation has been verified

Evaluation Checklist (EIS.561)

- Report is now available through AC so new format (EIS.461) option exists to create checklist options for end users to select. If you do make some options for schools to do evaluation checklists for their teaching and/or support create multiple formats and start them with a ‘Z’ to make available to connect.
- New selection to print emp#, position status or neither
- Added location restriction so schools should get this report added to their SCHEMS menus!



Employee Accident/Injury Report (EIS.536)

- Added selection to be able to limit report to WCB claimed only or exclude and WCB denied Y/N/ALL
- Added selection by Position sort order.... Which is really the position group field in EIS.154 which allows you in EIS.995 to summarize by position and in the case of injury reporting select group of positions only to limit report to only employees with injuries while at a certain position.
- Added nature of incident code to report

Employee Document/Images Log Report (EIS.566) ** New Report

- This report indicates by category and type (view, add, update) what images match your criteria. For example, if you wanted to know how many employees viewed their T4’s during Jan-Feb – this report would do that.

Display Employee Document/Image (IMG.301E) ** New Item **

- Fabulous new option to within the green screen 'Index for all images on file and be able to access those documents without having to go to AdminConnect to see it.



Employee Roster/FTE listing EIS.995

- Corrected sort by location to include both location and location# - previous logic did on occasion provide unexplainable sorting issues
- Enhanced report for showing start/end dates. Previously if end date was 12/31/29 neither start or end date printed – could not tell new starts or anything date related for permanent staff. This is a significant change, ie: dates will now print if start date is new this year.

Print Employee Letters (PAI.580)

- Enhancement to break properly on second page if 3 more assignments, ie: already handles first page that >3 records means pagebreak .. now same deal if you are showing 6 assignments to break twice before printing letter
- Changed to print employee number beside name on all letters not just NS format
- HUGE HUGE: New ability to print signature overlay on user decided place on letters. Add a new **SIGx (SIG1,SIG2,SIG3). This signature will position itself appropriately and be an additional overlay from the letterhead. It will appropriately print only at the end of the letter.

Employee Audit (PAY.190)

- New Index of employees by Name to prevent having to go elsewhere to get employee#

Workshop Maintenance (POS.320)

- New field for Require Approval Y/N which will allow location supervisors to then see and first level approve the workshop request
- Now accommodates multiple facilitators in case additional people will want to use EmployeeConnect to review workshops and expected attendees
- Now accommodates limit workshop to PRO.300 position, SubType, or skill (limit this workshop to all physed teachers)
- New option to be able to post workshop but not allow for apply
- Added fields for room definition (as defined MAT.005) to prepare us to be able to start considering to schedule rooms and look for available rooms (like permits)
- New ability to add absence code and reason to workshop so that with POS.564 you can compare Sub records with workshop applicants

Workshop Listing Summary and Detail (POS.541)

- New select for unapproved or approved workshop applicants
- New option to print demographic information and/or grid list which will print 5 boxes (intended for attendance) .. Same option available to facilitators in EC

Print Workshop Completion Certificates (POS.562)

- New option to electronically fil a pdf copy of the certificate. Program is looking for an overlay and then creates separate certificates per completed applicant and stores in their electronic folder as type CER. As long as you open up category CER to EC – employees can access their own certificates and reduce all of that paper.

Mass add applicants to workshop (POS.565)

- Added selection for location, ie: limit to location(s)
- Added selection by category (all with expiring CAR/CRC)

Position Table Report (POS.501)

- Enhanced layout by adding program title, allowing to print FTE or hours. Also moved position# totals to line up
- New selection for account or description
- Added a new file download option

Position/Payroll/Finance Compare (POS.997)

- New select to show just account differences only to focus on account distribution errors

Position skill/program Variances report (POS.998) ** New Item **

- Report will identify issues between PRO.300 records and the position number IF you have identified program type limitations in the skills (EIS.132). For example, if you skilled someone as Reading Recovery and within RR indicated a particular program say RR but then put regular teacher as position number – variance report will highlight this discrepancy.

Mass Email to Employees or to Job Posting Applicants (POS.525, PRO.525)

- Better messaging/warning – if you send an attachment message must be much shorter than space provided (like only 3 lines)
- Enhancements for Postings – if Posting window is selected F4 then posting information will automatically default into the body of the message
- Enhancements for Workshop selection – if Workshop window is selected F4 then workshop information will automatically default into the body of the message
- Smarter on Subject line with attachments – previously subject got wiped out by the document name when attachments were sent .. now works as you expect.

Job Posting Maintenance (POS.220)

- New option to auto-shortlist Y. If this is selected then everytime someone applies the shortlist will autofill making that record available immediately to people reviewing the posting in AdminConnect

Job Posting Applicant Profiles (POS.526)

- If CAR/CRC attachment is not found then checks category to confirm are ONFILE
- Changed report to 3 columns with skill type descriptions from EIS.180



CIMS Payroll Related Items

Employee Time Absent/Worked Detail Listing – PAI.502

- Report now sorts in absence date order rather than run#... not usually an issue but late recorded absences would not be showing up in the proper spot.
- NEW – now automatically builds a details file EMSTRANS/PPAI502D(CUST00)

Find me who Absence Report (PAI.504)

- Now show current PRO.300 line type and status on report to help recognize current status
- New prompts on report to be able to convert for reporting to hours/days. For example you may keep Vacation in hours for system reasons but would like to report in days.
- New option PAI.704 to define formats (start with Z to make available to schools/restricted locations)
- Reformatted screen to accommodate format defaults and extras not applicable to schools

Payroll Account History report by account (PAI.516)

- Great enhancement to be able to select previous year (ie: include a school year date range)
- Now enforce reasonable date range or run# to be inputted to prevent possibility of running too large a report and causing system to bomb

Payroll Processor (PAI.600)

- Payroll message can now be upper/lower case
- Added OPAI6541 back to list of reports and efile. This report sorts in cheque# order and because of that makes it different/worthwhile
- On wage details and absence reports – now prints totals and employee count
- UIC rebate did not work on multiple assignments – only applied to last assignment rather than now ALL active assignments

Payroll Run# History & Register Image Lookup (PAI.609)

- Show direct deposit and email flags on report so you know at time of running the payroll what each persons' settings were
- Show total employees paid, total FTE paid and gross payroll totals

Payroll Cheque Reversal (PAI.648) *** New exciting Option **

- Much more powerful option than a void because the reversal is with a different date and posts all new cheque lines, finance credit lines, etc.

Employee ROE (PAI.710)

- New XML file format is ready to use. This new format will also accommodate 53 weeks. Deb comments that she thinks everyone should move to the 53 week scenario.

Auto-Build Termination Records (PAI.716)

- Added field to select the alternate pay grade/step from employee assignment (if it exists) versus selecting the main pay grade/step.

Payroll Deduction Register listing (PAI.804)

- New predefined format (PAI.904) available for common reporting

Employee T4 Print (PAI.810)

- Enhanced the employer copy to incorporate the overlay so looks same as the official copy
- Added T4 overlay
- Added option to efile T4 (this year or any previous year). It names the T4 T4YYGRPx.pdf (YY=year, GRP is critical and goes from whatever you entered in producing the T4s, x = 0 original, 1 revised). It is important that if you rerun T4's that you use a consistent group ID else duplicate efile T4s will occur.
- New option to exclude printing T4s where employee has consented to receive copy online (T4WEB = Y)
- If employee has contributed CPP and or EI override exemption (turn 60 in the year but did contribute sometime in the year).
- Was an error with box 77 not appearing in transmission file – resolved

Employee T4A Print (PAI.812)

- Enhanced to allow footnote code for Box 38

Mass Delete Employee T4 eFile Copies (PAI.830) ** New Item **

- New option to mass delete efiled copies in cases where you have to remove singles or have completed a PAI.810 in error.

T4 Pension Adjustment Build (PAI.850)

- Added employee count and total earnings and PA amounts

Build A/R Invoices from a payroll (PAI.910)

- Added new select to 'Exclude employee paid amounts' Y/N
- Added new select to 'Exclude charges to specific account(s)

Auto Build STAT Addenda from previous pay (PAY.344)

- Added additional exclude addenda items (additional 5)
- Added field to exclude time card records from a specific location

Payroll Assignment (PAY.345)

- DEFAULT change: When you Add a new employee and F7=Payroll Information the default for direct deposit will now be Y (previous to this version it defaulted as N)
 - Absence history now sorts in absence date instead of run# order to accommodate/better sort late and manual adds
 - Great enhancements to terminations records in formalizing the other monies section so you can indicate appropriate codes and minimize comments. Indicate E in comment for Sev Pay.
 - E Severance Pay
 - R Retire Allowance
 - U SUB Topup
 - Y Pay in Lieu
- OTHER MONIES Y/N Y OTHR\$ AMOUNT 120.00 E SEVERANCE PAY

Time and Attendance Maintenance (PAY.408)

- New default period end date that can be setup from data area. There is an option PEREND where you can set a default timecard date for period end and addenda end (same value). If you input a value in there ... it will be default into the period end date of every timecard rather than to be blank!

Mass Email (PAY.525)

- Better messaging/warning – if you send an attachment message must be much shorter than space provided (like only 3 lines)
- New option to be able to mass email based on direct deposit notification, ie: send all the W's a reminder that web service will be down
- Smarter on Subject line with attachments – previously subject got wiped out by the document name when attachments were sent .. now works as you expect.

Employee Absence code grid listing (PAY.596)

- Added averages at the bottom of the report for current and annual. Annual is calculated based on todate and the calendar to project full year at same rate.

Absence Code Profile

- New select to exclude employee absences when employee was not active (no A? line in PRO.300) This is important as it would otherwise inflate regular absences with absences for people who run out absences to get onto STD.
- Added wildcard logic so you can look for all active A? and all sick SICK? Rather than to have to spell out all the individual codes.

Employee Absence Short/Long occurrence Statistics (PAY.599) *** NEW REPORT **

- New report to give absence statistics on employees for a specified date range, i.e. single day absences, two days in a row, 3-5days in a row, or long term absences (more than 5 consecutive days)

Ref : PAY.599		TAKE TWO INC.												Page
Date: 7/15/10		ABSENCE STATISTICS REPORT												
Time: 19:23:58		JAN. 01, 2001 TO JULY 15, 2010												
Employee	Location	Short Term Occurances					Short	Short	Long	Long	Total	Total		
		1	2	3	4	5	Term	Term	Term	Term				
		Day	Day	Day	Day	Day	Occ's	Days	Occ's	Days	Occ's	Days		
AFINOGENOV, CHERYL H.	1191 WACHOVIA	PRINCIPAL	6	3	1	0	0	10	15	0	0	10	15	
AFINOGENOV, MICHELLE	1470 WACHOVIA	TEACHER	5	5	2	0	0	12	21	0	0	12	21	
AFINOGENOV, ROSS	1517 WACHOVIA	TEACHER	3	2	1	0	0	6	10	0	0	6	10	

Employee Absence Calendar Lookup (PAY.805)

- New Function key F13 to access leave requests

Auto Load Addenda from a File (PAY.962)

- Added hours and rate fields to end of upload file. This is for information only – total will not calculate so must also be in the file (as per usual)
- Added EI hours and EI\$ flags to prompt

Mass Inactivate stale employees/assignments

- New option to clear child abuse and criminal record check fields at same time as inactivating



BC Specific Items

Ministry 2003 File BCP.2003

- Allow for more addenda code selection (added 6 more)
- Allow for more other addenda code selection (added 6 more)

EDAS/BCPSEA Transmission File (BCP.860)

- Since last July have made many changes as necessary to standard and custom code to ensure that EDAS transmissions are as per EDAS requirements. **NO** adjustments have been made since May 11th.

General Report Writer (EIS.260)

- Added new field #530 EDAS position override number (from pay assignment)



MB Specific Items

Build TRAF TCH Monthly records – MAN.828

- Added new selection to list an addenda code that will be identified as non-pensionable and included in the TRAF transmission in the new NSPE field. WSD is using this. Contact Take Two for more information.



Sub Records Process

Mass add SUB.001/SUB.002 Absence Record (SUB.907) ** NEW ITEM

- New option to mass add a sub record to a group of employees based on job code. Select job code date, reason, etc. Excellent for marking mandatory days for Eas and then delete those few that did not take the day or whatever. Handles spring breaks etc.

Casual Monthly summary report (SUB.991)

- HUGE! Enhanced to allow selection for consecutive occurrences (ie: all CAS who have worked for >12 consecutive days (looks to the calendar to confirm consecutive). This could save you significant time in manually managing this.

New report prompt:

(Uses PAY.110 SUPP for days)

LIMIT TO Greater Than 12 OCCUR/DAY Consecutive Y/N? Y Same EMP N

Sub and Support Staff Listing (SUB.997/998)

- Reformatted report slightly to accommodate a longer account code
- Smarter in reporting account code. If employee is absent but there is no replacement then account code will not print even if include account = Y.

Support staff listing Board Office (SUB.999)

- New select to be able to page break by location or not. Default is Y but if you are using this as a checklist answering 'N' can save significant paper.