



## March 2011 - Employee Payroll and H/R Enhancements Summary Release 15.0

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: **Due to this release coming out right before Conference – we will not have a webinar. Features of this release will be discussed and shown at conference.**

### **Control Access to Employees – PAY.ACC \*\*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)

### **Summary of Special Features:**

- Lots of work done on leaves and leave reporting in the past 6 months
- Lots of work done on Workshops and reporting
- Introduction to Bulletin Board and Employee Web Forms which have huge potential
- No new concepts in payroll but many great features and adds to daily operation



### **CIMS Human Resource Related Items**

#### **Create District Distribution Lists from CIMS HR – PRO.150 \*\*NEW**

- It is a nightmare for IT to manage distribution lists so let CIMS. Create your distribution lists in CIMS using the new PRO.150. Then every night files get built (detail, summary) that gets sent to Active Directory to (delete existing group, create new group) based on today's employees as defined in PRO.300. This is a HUGE step forward!

#### **Certificate Codes EIS.131**

- New prompt to 'Display expired Certificate info in EmployeeConnect'. If you are maintaining certain required documents and want the employee to know about expirations then change this to Y so all those certificates will be visible.

### **PD: Course Codes EIS.210**

- New prompt to 'Include course info in EmployeeConnect'. If you are maintaining certain course completions (either directly or through workshop completions) and want the employee to be able to view this information say 'Y' to all the courses or those that should be visible.

### **Employee Report Writer EIS.260 and EIS.530**

- Added item 110 for seniority hours
- HUGE: Added item 862 PRO.300 contract days (system generated as per date range on PRO.300 \* FTE but considering the work schedule calendar to calculate properly)
- F2 additional rate information never appeared in report writer. When pay assignment information is requested, now the F2 additional rate information will also be included.

### **Basic Employee EIS.301 and EIS.380**

- Will not allow you to delete an employee if they have pay, PRO.300, and now also checking for workshops, evaluations, or leave requests.
- On skills quick entry a '\*' will indicate any skill that has expired
- On skills quick entry a '#' can be entered on an endorsement (rather than X,P, C, or M) to indicate that this item is missing. Districts are using a REQDOCS certificate and adding what documents are missing from an employee. Expired documents appear on EmployeeConnect and JobConnect.
- In Certificate/Endorsement screen a new date 01/01/2001 is highlighted and will show on reporting and in EC/JC as missing. This works well in EC to know the difference between something being expired and something missing.
- \*SIGNIFICANT: New option to email employee with e-filing a letter using the 'P'. This is one step closer to eliminating some of the paper for employees and providing the equivalent online. NOTE: This does not email the letter to the employee but sends them a notification that a letter has been electronically filed in their folder and to view it in Employee Connect.
- \*\*HUGE HUGE \*\* Position number in F11 will automatically fill a position number based on:
  1. Looks for skill and skill has a program defined EIS.132
  2. Looks to POS.200 to find location or work location match

### **Accident/Injury WCB Time Loss & Wages EIS.325T \*\* New Option**

- New option for payroll to maintain loss and wages information to integrate with the Accident record. There is a 'P'rint option.
- Can be maintained outside of EIS.325 so Payroll can manage without providing full access to the injury record.

### **Accident/Injury Maintenance EIS.325**

- Print has been enhanced to include WCB time loss & wages information defined in EIS.325T
- Now allows for multiple attachments and the F2 indicates how many attachments are on file and allows you to select/view them.

### **Define Leave Requests PAY.114**

- New Rational required Y or N so you can make rationale optional on things like PERSD where you cannot ask 'Why will you be away'.

- New Minimum days between request date and leave date so you can control lead time for those leave types that require it
- New Max number of days/hours that you can input for this leave AND a new 999 that means don't ask for number of days/hours. 999 is good in your long term leave types where you don't want users to start calculating exactly how many days that leave will entail
- New maximum leave occurrences per employee per leave type based on start date inputted on the leave definition. Use this for things like personal or vacation where they may enter all of their requests at once (nothing posting to history) but you want to limit them to a certain number days.
- Added ability to input more sub-types (good for things like bereavement to ask more questions)

### **Employee Leave Maintenance EIS.316**

- Added F2 – View attachment (if there is one attached)
- Added F6 – view e-filed copy of leave request (if there is one)
- Can now change the leave type without having to delete and recreate the leave
- System now checks on 'C' hange or 'A' dd that all approval levels are completed properly and will not allow you to exit until approval levels are appropriate (cannot cancel without approving, cannot approve without recommending from school)
- Enhanced Sub/TOC questions: new preferred Sub and Sub Comment fields and control at PAY.114 level as to who can input/edit that information and whether to show it at all.
- System would check on a 'C' ancel that SUB.002 record did not exist and it would error if there was a SUB entry. Now it will look for same absence code before erroring.
- Now be less sensitive to job code checking on absence leave. It will provide leave types for all pay assignments regardless of them being active or not.

### **Auto-email school contact regarding leave request not handled**

- There is a new auto-job that can run every night and review leave requests that are more than x days old (from request date) and still remain “pending recommendation” ... then email those administrators a single reminder (not one per leave) that they should be checking. Some districts already have this running. If you are using CIMS online leaves and do not have this feature .. contact us to setup!

### **Employee Leave Request Report EIS.538**

- Added new sort by location to assist in reconciling records by dealing per school rather than per employee

### **Employee Leave Request Committee Grid Report EIS.539**

- New effective date range selection
- Indicate completed and cancelled statuses for leave requests
- Added option to select any status(s) for reporting (was missing cancelled, completed)
- Added request date to report

### **Employee leave requests versus Sub absences report EIS.564**

- Added limit to reason codes (up to 5) so user can restrict to one absence code and up to 5 reason codes

### **Monthly Calendar View Leave Totals Listing EIS.595**

- Added option to count/summary leave information per employee (count) or as total hours/days per calendar date.
- This is an excellent summary report to know how many staff are scheduled to be off

### **Build P/O Requisitions from Leave Requests EIS.910 \*\*New Item \*\***

- New option to build employee advances based on approved leaves that have estimated costs defined to be included in advance calculation.

### **Mass Update Demog location/Assignment EIS.964**

- Enhanced to check for all 3 locations and re-consider at each location . This will simplify the report – used to show some staff that were OK.

### **Employee Document/Images Log Report EIS.556**

- Enhanced to be able to select to print Employee category on log report. This will allow you to print categories T4F and show T4WEB to investigate those staff that have moved online for T4 rather than printed copy. It will help to balance the expected number of T4's that you physically print.

### **Employee Roster/FTE Listing EIS.995**

- On S format print location
- There was an error that only occurred sometimes and when printing all rosters where page breaking went wonky .. resolved.

### **Maintain Web EC bulletin board messages PAY.325 \*\* New Item**

- New option to maintain bulletin board messages that will appear in EmployeeConnect and AdminConnect. It will allow you to post for a particular time period AND to all staff or selected staff based on PRO.300 (post to all resource teachers, post to all Casuals, Post to all TOCs ....)

### **Maintain WEB Form Definitions PAY.328 \*\*New Item**

- New option to maintain and post an employee sign off/approval record and form that will appear on EmployeeConnect. Use AdminConnect to attach a document to a form record. YES/NO or multitude of responses

### **Web Form Permission Report PAY.558 \*\*New Report**

- New report to identify on a form – all employees that should receive that form and all of the replies.

### **Certificate/Endorsement Listing PAY.492**

- Will now allow you to limit to everyone that has an endorsement (e.g.: all the TOCs who can teach PRI) and then not have to actually show that endorsement as a selection. This is only important if you are running out of space along the columns of this report
- Added both regular and alternate email addresses to the listing

### **Job Posting Maintenance POS.220**

- Now accommodates .docx
- New prompt on applicant details to Email Y/N if withdrawn date is inputted.

### **Job Posting Application History Profile POS.529 \*\*New Report**

- New profile for a single employee that lists all of the job postings they have applied for in a certain date range.

### **H/R Workshop Maintenance POS.320**

- On attendees new fields to hold approve/deny status as per the location
- Allow within green screen option to Approve or Deny and automatically send an email to employee
- New field for Maximum# of workshops per day per employee so if you are planning several workshops on a PD day and employee can attend 4 – that will ensure they are not over selecting and filling seats
- New start time and end time fields that are necessary in order for the download to district SharePoint, outlook, or firstclass calendar to work

### **Create Workshop File for integration with SharePoint Calendar AUT320C \*\*NEW**

- New nightly job that builds a file of all future dated workshops. This can be used by your SharePoint or outlook calendars (remove any X type calendar entries dated today or greater, then reload from our file).

### **Workshop Listing POS.541**

- If workshop applicants require approval then report will indicate ‘R’egistered but with a ‘\*’ implying still waiting for approval.

### **Build Certificate/Endorsement from Workshop**

- New option to build auto incrementing endorsements for an employee (i.e.: check main endorsement as per prompt and if employee has that one add the second choice, third choice .. up to 10). If districts are counting sessions per employee and a certain number of sessions triggers say a pay increase .. this new option will figure it out for you!

### **Print and eFile Workshop Completion Certificates POS.562**

- Added option to select overlay. Standard overlay is WSCOMP
- Added option to send an email notification if certificates are e-filed to employees receiving the completion certificate indicating to ‘Go to EmployeeConnect to collect your certificate’. Reminder that a CER folder must be created (EIS.122) and made available to EmployeeConnect

### **Copy Workshop definition to new workshop(s)/Date(s) POS.566 \*\*New Item**

- New option to copy a workshop to as many as 5 others and update dates without having to go into each workshop individually (Add with Copy).
- This does not copy the applicants .. POS.565 will do that

### **H/R Mass Email message to Employees PRO.525**

- If primary email address is blank, look to alternate email address and send to that (if not blank)

- If you are sending an email based on a workshop, details of that workshop will automatically appear in the message area to prevent you selecting the wrong date/time
- Added new 'U' status for workshops to be able to manage those attendees which have registered but are awaiting school approval.

### **H/R Mass Email message to Employees & Job Postings POS.525**

- If primary email address is blank, look to alternate email address and send to that (if not blank)

### **Position Control: Adjustment Reason Codes EIS.152 \*\*New Option**

- Define reason codes for why changes to budget have been done in position control.

### **H/R Position Table Report POS.501**

- Added FTE adjustment comments on the report
- Now do a better job at sorting report properly alpha by position
- New select by Sector
- Ability to report by either actual FTE or factored
- Better formatting and highlighted subtotals and grand totals
- Ability to setup predefined formats so once your formats are in place the report is very easy to run. New format definition is POS.701



## **CIMS Payroll Related Items**

### **Accident/Injury WCB Time Loss & Wages EIS.325T \*\* New Option**

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- Can be maintained outside of EIS.325 so Payroll can manage without providing full access to the injury record.

### **Accident/Injury Maintenance EIS.325**

- Print has been enhanced to include WCB time loss & wages information defined in EIS.325T
- Now allows for multiple attachments and the F2 indicates how many attachments are on file and allows you to select/view them.

### **Payroll Cheque Void/Replacement PAI.410**

- Now shows payroll run# in posting reference in the G/L for better reporting from finance

### **Payroll Cheque Lookup PAI.420**

- Enhanced to display teacher time worked in days instead of hours

### **Employee Pay Detail/Summary Report PAI.505**

- Now allows addenda types to be included (specify what addenda) or to exclude certain addenda types (include all addenda except).
- Added Calculation for HOURS. This will allow you to get say all of the bus drivers who have worked more than 80hrs between dates A and B.

### **Time and Attendance Listing PAI.501**

- Now produces an additional summary report per employee per day. This will make it easier to see what employees may be subject to overtime based on X hours worked in a day.

### **Employee Absence Liability List PAI.512**

- Added hours user and amount used to download file

### **Payroll Account history report by account PAI.516**

- Previous to this release this reporting did not consider voids, now it does as G/L transactions occur with voids and so should report

### **Employee Overtime Listing PAI.517 \*\* New Report**

- Great new report to show overtime addenda(s) (OVR1.5, OVR2.0) either separately or by column and then also bring in absence code (OTBANK) information all in one report/download file.

### **Payroll Processor PAI.600M**

- Add alternate EI Listing (OPAI641) to e-filed reports.

### **Payroll RUN# history and register Image Lookup**

- Added new F13 for alternate EI listing
- \*\*HUGE: added new F11 for extra attachments. Payroll can collect up all the additional crap collecting with that run#, scan it, then copy it to /cimsems/ as per the document name shown at the bottom of PAI.609

### **Payroll Cheque Reversal PAI.648 \*\* New Item**

- New option to reverse a payroll cheque/direct deposit for a specific employee. This is identical to running a negative payroll but it does all the work for you. This should be used instead of cheque void for anything that crosses the month because you will see it in the current month (new date, new run#) in comparison to a void which does everything against the original date and month.

### **Employee T4 Print PAI.810 and T4A PAI.812**

- Updated overlay and attachment for 2010 format changes
- Allow for new footnotes 66,67,68,69 (T4 option)
- Allow for e-file of the T4a \*New
- Little smarter in checking – if earnings (Box 14) and ei earnings (box 24) are within \$1.50 then assume they are the same and clear box 24. This will handle rounding issues
- New select by category so you can handle amended T4's in a group. You can create a category and add to all T4 amended people – then run the T4 build once for that whole group (rather than having to do many sets of multiple employee numbers)

### **Employee Audit PAY.190**

- Changed Index to be newest to oldest (date and time)

### **Maintain Web EC bulletin board messages PAY.325 \*\* New Item**

- New option to maintain bulletin board messages that will appear in EmployeeConnect and AdminConnect. It will allow you to post for a particular time period AND to all staff or selected staff based on PRO.300 (post to all resource teachers, post to all Casuals, Post to all TOCs ....)

### **Maintain WEB Form Definitions PAY.328 \*\*New Item**

- New option to maintain and post an employee sign off/approval record and form that will appear on EmployeeConnect. Use AdminConnect to attach a document to a form record. YES/NO or multitude of responses

### **Web Form Permission Report PAY.558 \*\*New Report**

- New report to identify on a form – all employees that should receive that form and all of the replies.

### **Auto Build Summer Savings Interest Addenda PAY.348 \*\*New Item**

- New option to collect all contributions to an addenda per employee for a date range, have CIMS calculate appropriate interest amount, and automatically add an addenda per employee with that interest amount.

### **Pre-Printed Timesheet PAY.400**

- Standard overlay showed the WSD logo – corrected to show no overlay
- Shifted contents over to line up better with overlay

### **Mass Email Employees PAY.525**

- If primary email address is blank, look to alternate email address and send to that (if not blank)

### **Auto-Build Daily Stat using Average Hours PAY.544 \*\*New Item**

- New option to auto build a STAT addendum based on average hours. Select date range of timecard entries to consider and CIMS will calculate the average hours per day for that time period and then use that and the employee rate to create the STAT addenda.

### **Employee Absence Short/Long occurrence statistics PAY.599**

- Added new sort by location, position, or employee
- Now excludes all transferred absences (from one assignment to another) entries

### **Auto Time Card Builder PAY.808**

- New ‘Start Date’ prompt to reduce warnings especially in September when all the new start dates are after September 1 producing unnecessary warning/errors.

### **Fiscal Yearend processing for absence codes PAY.811**

- IMPORTANT new feature. The minute you run your absence balance fiscal – you lose what it looked like to June 30<sup>th</sup> because the payroll files are calendar NOT fiscal. To enhance tons of reporting ability it is important as you run PAY.811 in JUNE ONLY that one time (not

necessary to run for each absence code) answer 'Copy absence summary to fiscal history prior to process' Y. The default remains 'N' as you do not want to do this at calendar yearend and you only need to ask for it once for fiscal period. Update your notes with this new rule as it would have saved HOURS of effort in your absence liability reporting (Manitoba).

### **Mass build time cards from Field Trips (Student) PAY.818**

- Added hours sub-total by driver
- Include day of week and added \*WKND to highlight weekend dates

### **Step Increment and/or CHG dates in Pay Assignment PAY.840**

- Now all changes are written to the employee audit PAY.190

### **Mass Inactivate Stale Employees/Assignments PAY.975**

- New selection to be able to remove banking (direct deposit) information at the time of inactivating

### **Purge Applicants never hired PAY.979**

- Smarter to be able to keep applicants who have been interviewed for a job posting (never been hired but show interview activity)
- Smarter to be able to keep applicants if they have ever applied for a job posting (can get rid of all those that have attempted to apply but were unsuccessful)



## **BC Specific Items**

### **BCPSEA Table BCP.382 and Build BCP.850**

- Allow classification and position to be left blank for Table NOT and key 9999. This will allow you to exclude certain staff from the EDAS transmission. They will be reported so that you can balance to your payroll numbers BUT the transmission file itself will not build for anyone marked as table 9999.
- Automatically exclude addenda SUMSAV from being included in PAY
- As per April new requirements from EDAS we are now reporting FTEs (Element #20) for Support Staff \*SU) but not casuals. We are capping the FTE at 100% so if you have some people marked 125% they will go to EDAS as 100%
- As per April new requirements from EDAS we are reporting annual base salary (element #25) for Exempt (EX) and Support Staff (SU).
- Now that PAY.955 transfer absence balances has the new transfer description reason – we are now able to exclude these absence entries from calculating and reporting in EDAS.

### **Build SuperAnn Permanent File BCP.820 and BCP.825**

- SuperAnn file was expanded to include types and date. It autobuilds only RG type records
- Can now manually maintain special RT and RH records and dates
- Opened up the 'A'dd with 'C'opy so user can easily transfer a record from RH to RT



## **MB Specific Items**

### **T4 Pension Adjustment Build PAI.850**

- Enhanced to allow for a second deduction code only to be used for retro TRAF. This is required to inflate the subject earnings for the PA.



## **Sub Records Process**

### **Compare Teacher and SUB/TOC Grade/Step CHKTOCGRAD**

- New query added at all sites which reports on any person who has a TEACH and SUB/TOC grade/step differences as per their PAY.345 Assignments (forget to update the TOC alt portion when the teach one changes).

### **Support Staff Maintenance SUB.001/002**

- Show Adjust status on Indexes. Some districts are using SUB.001 to assist in their calling. They use symbols in adjust statuses e.g.: if status is ? means SUB/TOC has been called and we are awaiting a callback from the person to confirm.

### **Search for Available Substitutes SUB.305**

- Added PRO.300 skills view on main sub search screen so user is aware of overall skills of the teacher upon assigning a SUB/TOC
- Added additional email address and all 5 lines of demog information on SUB when displaying their details (second screen)
- Now shows all skills for that SUB in the details line so caller is aware of this

### **Substitute Monthly Summary Report SUB.990**

- Added new Previous Period date to consider the number of days back in the previous period to look for consecutive days. If you are looking for say 4 consecutive then previous period would be 3 days before you start date value.