TakeTwo has your back!

HR PD SESSIONS: WEDNESDAY, NOV 4TH

- 8:30 – 10:00am AC/EC Highlights
- 10:15 – 11:30am Reporting
- 11:30 – 12:30pm Lunch
- 12:30 – 1:30pm Evaluations
- 1:45 – 3:00pm Letters, Onboarding
- 3:00 – 3:30pm Teacher Specific

TakeTwo has your back!

- Welcome everyone!
  - HSD, ISD, LSSD, PLPSD, RETSD, SOSD, WSD
- National Conference – April 14-16th, Hyatt House WPG
  - Yes, we will be going to the polar bears again!
- Where to get help and detailed notes
  - Noticed the FAQs and Podcast? Suggestions on new ones?
  - Reporting and Setup match the HRMENU
  - Unique case documents (supply staff, treaty education)
  - Do you send new board office employees to our website?!
  - FYI – why we've adjusted how we send weekly notes

TakeTwo has your back!

- Our Goal Today (and always!): **Support YOU in an increasingly complicated and demanding environment that never stops changing**
  - AdminConnect = #1 – adding more and more options to drive more users there!
  - Simply menus = better chance of finding what you need
  - Simply options = less chance of mistakes
  - Create formats = less things to have to remember

TakeTwo has your back!

SESSION #1

ADMINCONNECT AND EMPLOYEECONNECT

NEW HIGHLIGHTS AND TIME SAVERS

TakeTwo has your back!

EmployeeConnect:

- Happy Birthday message category now optional (EIS.121 category)
  - Add to your New Hire to collect for new people!
- Absence details can now indicate ‘Missing Leave Request’ per absence code/reason (SUB.011)
- Entering a leave – simplified the screen
  - Can change the text of ‘rationale’ to better explain what employees need to enter in the description
  - PLPSD – have a subtype ‘I confirm this is correct’ for the new legislation
  - Can change text of help document
- Sub/Casual Availability Listing – can present to employee groups for staff to check a sub’s availability on a certain day themselves

TakeTwo has your back!

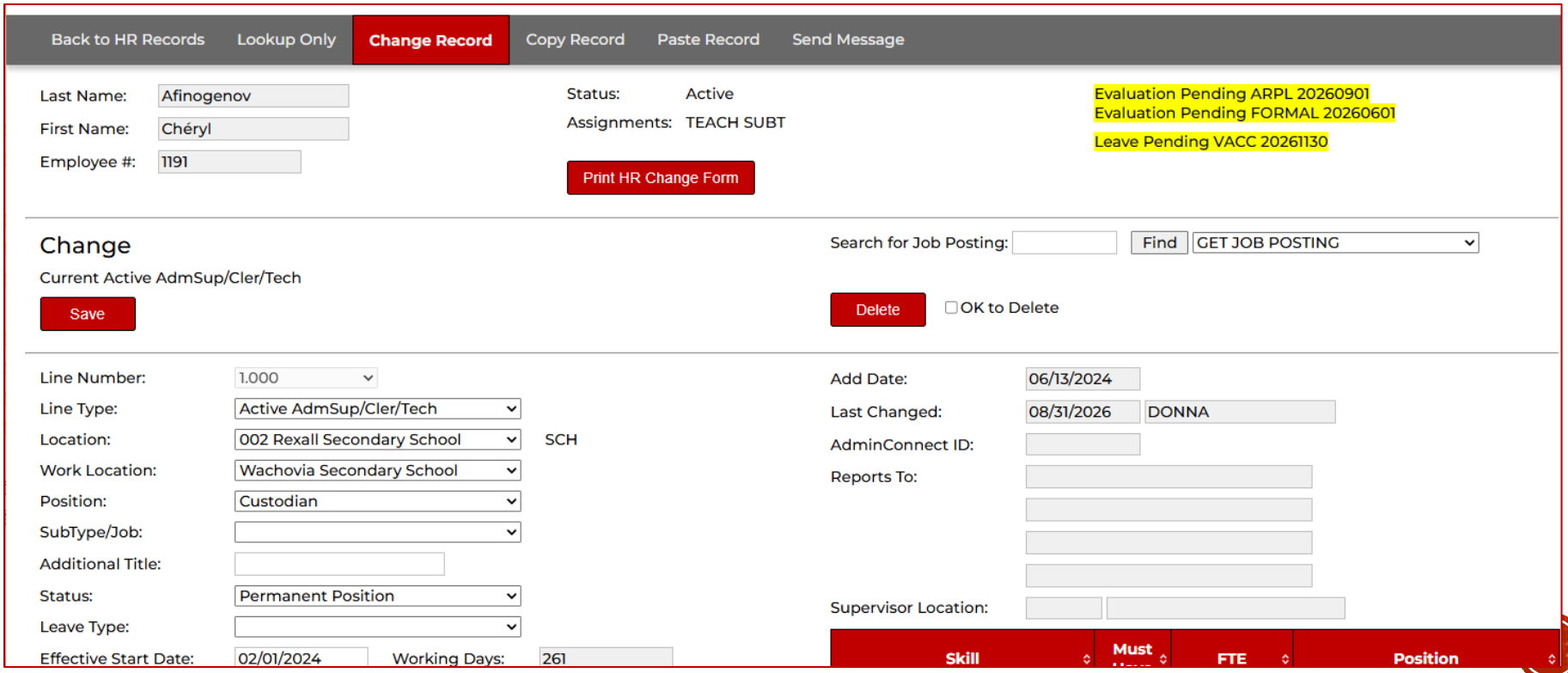
EmployeeConnect:

- Folder – add descriptions per type to help your staff
- Question – employee attachments – should we be restricting to PDFs only? Are you having issues with employees attaching?
- **EPIC** limited EmployeeConnect view – (ex. employees on leave)
  - Takes away evaluations, incidents, profile, sub/cas tabs
  - Need category code LMTEC (F19) with value ‘Y’
  - This is good for immediately removing AC/CorePlus access as well without having to change or remove a subtype!

TakeTwo has your back!

AdminConnect:

- HR F11 lines – add and edit in AdminConnect!!
  - Reminder – order of lines still matters
  - Reminder – audit log under the Payroll tab still applies



TakeTwo has your back!

AdminConnect:

- Staff List – can show certain work schedules and status/leave types (based on EIS.159)
- Job Postings – open postings now on My Priorities with posting status; can also copy emails to clipboard for applicants
- Allocation – allow admin to edit employee skills/subjects

Show 50 entries | Print | Print Current Page | PDF | Excel | Copy | Column Visibility | Search:

Change Form	HR Record	Subjects	Employee Name	Position	FTE	ADM	TEACH	COUN/GUIDE	CLIN
Print	View	Edit	Arnason, Susannah	TEACHER	1.0000		1.0000		
Print	View	Edit	Asham, Anne	TEACHER	1.0000		1.0000		
Print	View	Edit	Aucouin, Raymond	CLINICIAN Adolescent Mental Health Worker	1.0000				1.0000
Print	View	Edit	Baby, Randell	TEACHER	1.0000		1.0000		

- Sub Absence Records – are we mostly in AdminConnect or using Core Sub.001/002? SUB.912 – worth mentioning?
- Reminder of the HUGELY growing power of notes
  - Example SOSD and ISD use of ‘attendance management’ to get schools involved

TakeTwo has your back!

SESSION #2

REPORTING REMINDERS AND NEW CIMS OPTIONS

TakeTwo has your back!

AdminConnect Reporting:

- Staff Reports
  - Endorsement Checklist: enhancement to endorsements shown
  - Incident Summary by Location: *HUGE* for analyzing school related incidents
  - Subject/Skills Select: formats are needed, makes it easy to find subs who can teach certain topics
  - Sub Stats Report: can be over multiple years (also on My Priorities)
  - Any absence ones you would like me to focus on?
- Reminder – Staff Listing is EPIC – should be your go-to report. Seniority/hire dates are included – headcount tab means only once!
- Power of the Staff Absence/Work Calendar
- Leaves Different than Absences Report – think future dates for people who are missing leave requests that already exist as a sub record

TakeTwo has your back!

Core Reporting:

- Absence Percentage % Summary Report (PAY.589) – by person
- Employee F11 Overall FTE/Hours Report (EIS.517) enhancements – added summary total count and FTE/hours by position
- Employee Years of Service Report/File (PRO.420) – added skills to run 10M vs. 12M staff, and you must select a format
- HR Permanent Position Seniority Report (PRO.520) – only show employees once even if they have multiple F11 lines
- Leave Requests – Email PAY.114 Setup Details (PAY.614) – confirm your leave setups look good, including approval levels, date ranges, message codes, etc.!

TakeTwo has your back!

Core – What's New:

- User Access to Folders/Notes Report (EIS.522) – does everyone have the folder & descriptions document I previously created?
- Where are Message Codes Used Report (PAY.620) – important for cleanup to PAY.120!
- **HUGE* new EIS.309 Index's (like #4 by expiration date)
- Removed some fields to simplify EIS.380; anything else?
- Auto setup emails from within an F11 line (F6) – can send to alternate email, and changed the default from email address – anyone using?
- Bulletin Board Messages (PAY.325) – limit a message to those missing/expired a specific endorsement (ex. instructions on where to re-apply for a criminal record check or link to redo training)
- Reminder – EIS.992 – employees missing contacts, bank info, SIN, birthday, work permits

TakeTwo has your back!

Questions and Discussions:

- Is anyone running Active Employees with No Current/Future F11 Lines (POS.975)? Important to catch if people haven't signed contracts! Who are you paying that doesn't have an active F11 line!?
- Is anyone using EME.900/EXE.900/DEO.900 ? .. For what ?
  - All options should have a build file = E – if it doesn't, we need to know!
- File transfer (client and icons) should not be used – correct?!
- SECURITY – the big ANNOYING buzz word these days
  - Passwords and MFA
  - Keeping files/backup on shared drives = sometimes ok
  - Should not be sending personal information in emails

TakeTwo has your back!

SESSION #3

EVALUATIONS

SETUP TRICKS, WHO'S ATTACHING, VERIFYING STRATEGIES

TakeTwo has your back!

What type of evaluations are you doing these days? There have been many adjustments to performance assessment strategies, do you have any question for other divisions on what they are doing?

TakeTwo has your back!

Different Possibilities/Scenarios:

- 1 – employee attaches, admin marks it received, possible final verifier
- 2 – admin attaches, employee confirms attachment, possible final verifier
- 3 – admin attaches, possible final verifier
- 4 – employee attaches, possible final verifier
- 5 – no evaluation at all – employee attaches to their folder with a specific description, admin/board office can report on who has or hasn't attached (new Folder images report).
  - For things like ARPLs, learning plans, etc.

TakeTwo has your back!

Reminders on Evaluation Type Setup (EIS.207) Setup:

- First part – decides who is in charge of attaching and receiving the evaluation
- Can send all evaluations of that type to a final verifier, or only specific result codes (ex. unsatisfactory or of a specific ranking)
- Auto email evaluator/location within 10 days of due date if not received is what puts it on their My Priorities 10 days before due; before that, it lives in the Employee Main screen as active
  - Do we need to talk about this? When do principals want to see evaluations front and center on their Priorities?
- Default due date is dependant on the proper pay calendar (for ones like probationary)

TakeTwo has your back!

Reminders of What Exists:

- Mass Change Evaluation Dates (EIS.958)
- Mass Add Evaluation Dates – use formats, especially for annual ones!
- Evaluation Result Codes (EIS.212)
  - Result (marking received) vs. Follow Up (final verifier) vs. Both
  - Some are using follow up for a second verifier
- Evaluations Error Report (EIS.562) – good at start of year to know if you have some old ones at incorrect locations
- Who Received Eval Due Emails and Why (EIS.567) – when admin/senior management are asking why they keep getting emailed
- Calculate Seniority/Prob Calendar Date (PAY.471) – important over summer
- Calculate # of Working Days in Date Range (PAY.472) – can also be used to figure out sick leave days!

TakeTwo has your back!

New Enhancements:

- If Result = Y (EIS.213 Description Code), forces the administrator to put a result when attaching
- Evaluation Verify/Approval – displays the result with any follow-up information
- Enhancement to Past Due/Future Evaluations Report and Email (EIS.566)
  - Can be in control of the email sent out to either evaluators or employees – use EIS.766 for formats!
  - Could use it for future not just past – pre-tell administrators what evaluations are due this year
- Folder Image Log Listing (in AC) EIS.559 – report on teacher learning plans instead of having a true evaluation
  - Can print all staff and if they attached something or not

TakeTwo has your back!

SESSION #4

LETTERS, ONBOARDING, RANDOM TOPICS

TakeTwo has your back!

Experience tab (HR Records) – showing more to the employee now (status, FTE/hours, work schedule)…could this possibly reduce the number of letters you have to create and send? Ones like ‘Change of Assignment’ or ‘Change in FTE/Hours’

Are we spending too much of our day handling letters? How can we help simplify letters?

Who are you sending letters to?

TakeTwo has your back!

Letters:

- Enhancement – AdminConnect Letters – don't have to include location number (previously had the 3-digit number than location description)
- Enhancement – Mass Change Core Letter Single Line Text (PAI.285)
- Are you mostly individually producing or mass building?
  - Adjust Letter Templates (PAI.281) as needed to make it easier to mass email using Mass Email eFiled PDF Letters to Employees/Supervisors (PAI.581)
- FYI – Verification letters handle summer gap and people on leave…do you care or is this payroll?

TakeTwo has your back!

New Hire and Onboarding

- Add notes specific to an individual employee's onboarding
- How is onboarding going? Are all your groups completing work online?

TakeTwo has your back!

Other Topics

- Anything with incidents? With workshops? Job postings?
- Reminder about the quick screen options on the front screen of the HRMENU; benefits of ‘I’ndexing almost like a report instead of so many clicks through EIS.380
- How are you handling accommodations? Note with follow-up date with a new category? (can attach documentation to the note)
- Follow-up – are employees entering long term leaves (ex. mat leaves, paid leaves) into EmployeeConnect?
- Follow-up – are we using I’s vs. ‘L’s for paid leaves?
- Follow-up from previous conference – are we using POS.997 instead of still passing on GRN sheets?!

TakeTwo has your back!

SESSION #5

TEACHER SPECIFIC

CONTRACTS, EXTRA CURRICULAR, ACTING ADMIN PROCESS

TakeTwo has your back!

Topics We Can Discuss:

- EXCELLENT new option – Teaching Certificate Watch List Maintenance (EIS.111)
- Teacher and sub teacher contracts – do we have a standardized one yet?! Does anyone need theirs updated?
- Teacher Extra Curricular? Have you all watched the webinar? Do you have one or two or three leave types?
  - Documents on our website – Manual, Sample Form, Webinar
- Do we need to talk about how you're handling your acting admins?
- What about uncertified subs? Or supply teachers?
- Need to discuss the new Sick on the Job Injury (MTS 7.03)?