

Texas Skyward User Group Conference

# Time Off Reporting

Lori Johnson



# Time Off Reporting

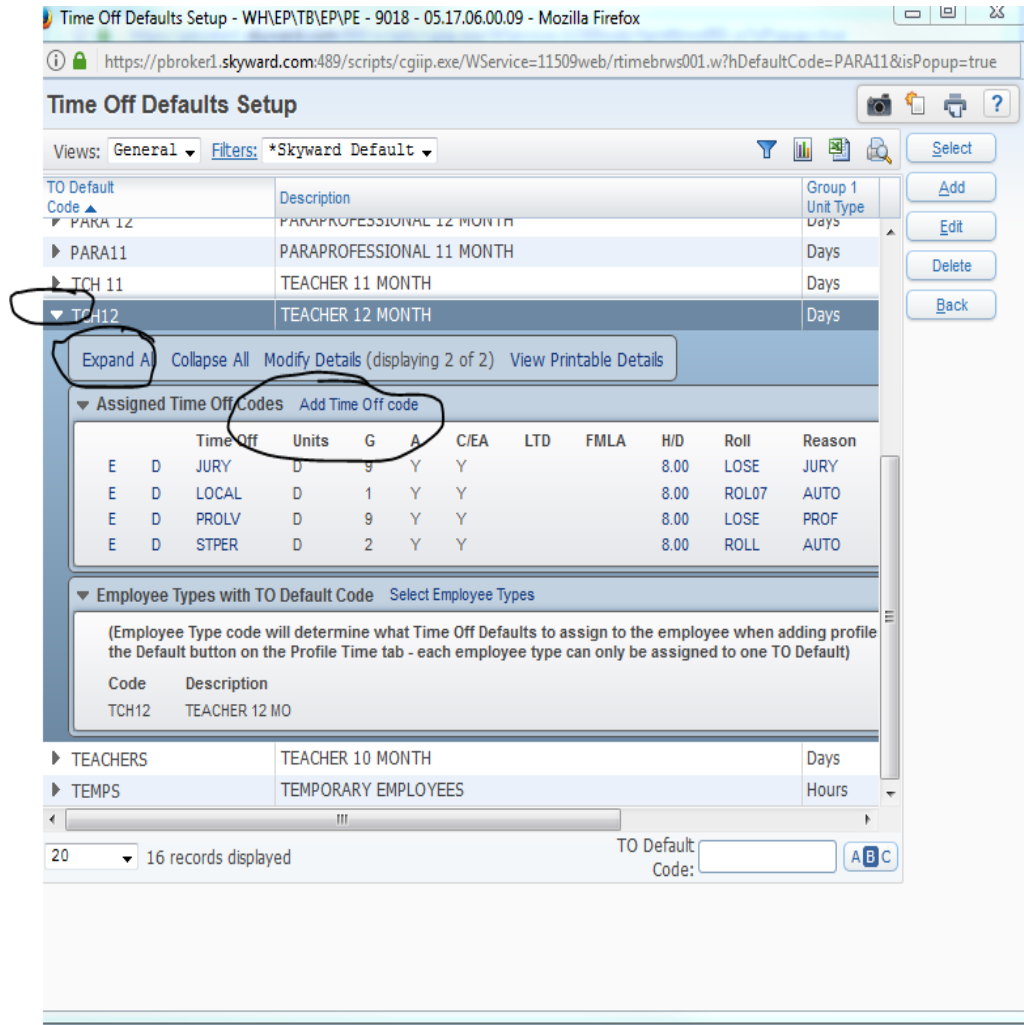


## Session Summary

- Create default time off records for employee types
- Add allocated hours for employees
- Hours from True Time or AESOP
- Run reports
- Bonus-FMLA forecast for employee out long term
- Questions

## Set Up Employee Type Leave Defaults

-If HR imports these employees from application process, have them say "yes" to the message. This will populate leave records for the employee.



Time Off Defaults Setup - WH\EP\TB\EP\PE - 9018 - 05.17.06.00.09 - Mozilla Firefox

https://pbroker1.skyward.com:489/scripts/cgiip.exe/WService=11509web/rtimebrws001.w?hDefaultCode=PARA11&isPopup=true

### Time Off Defaults Setup

Views: General Filters: \*Skyward Default

TO Default Code	Description	Group 1 Unit Type
PARA 12	PARAPROFESSIONAL 12 MONTH	Days
PARA 11	PARAPROFESSIONAL 11 MONTH	Days
TCH 11	TEACHER 11 MONTH	Days
TCH 12	TEACHER 12 MONTH	Days

Expand All Collapse All Modify Details (displaying 2 of 2) View Printable Details

Assigned Time Off Codes Add Time Off code

Time Off	Units	G	A	C/EA	LTD	FMLA	H/D	Roll	Reason
E D JURY	D	9	Y	Y			8.00	LOSE	JURY
E D LOCAL	D	1	Y	Y			8.00	ROL07	AUTO
E D PROLV	D	9	Y	Y			8.00	LOSE	PROF
E D STPER	D	2	Y	Y			8.00	ROLL	AUTO

Employee Types with TO Default Code Select Employee Types

(Employee Type code will determine what Time Off Defaults to assign to the employee when adding profile the Default button on the Profile Time tab - each employee type can only be assigned to one TO Default)

Code	Description
TCH12	TEACHER 12 MO

TEACHERS	TEACHER 10 MONTH	Days
TEMPS	TEMPORARY EMPLOYEES	Hours

20 16 records displayed TO Default Code: [ ] ABC

## Mass Allocate Leave to Employee Types

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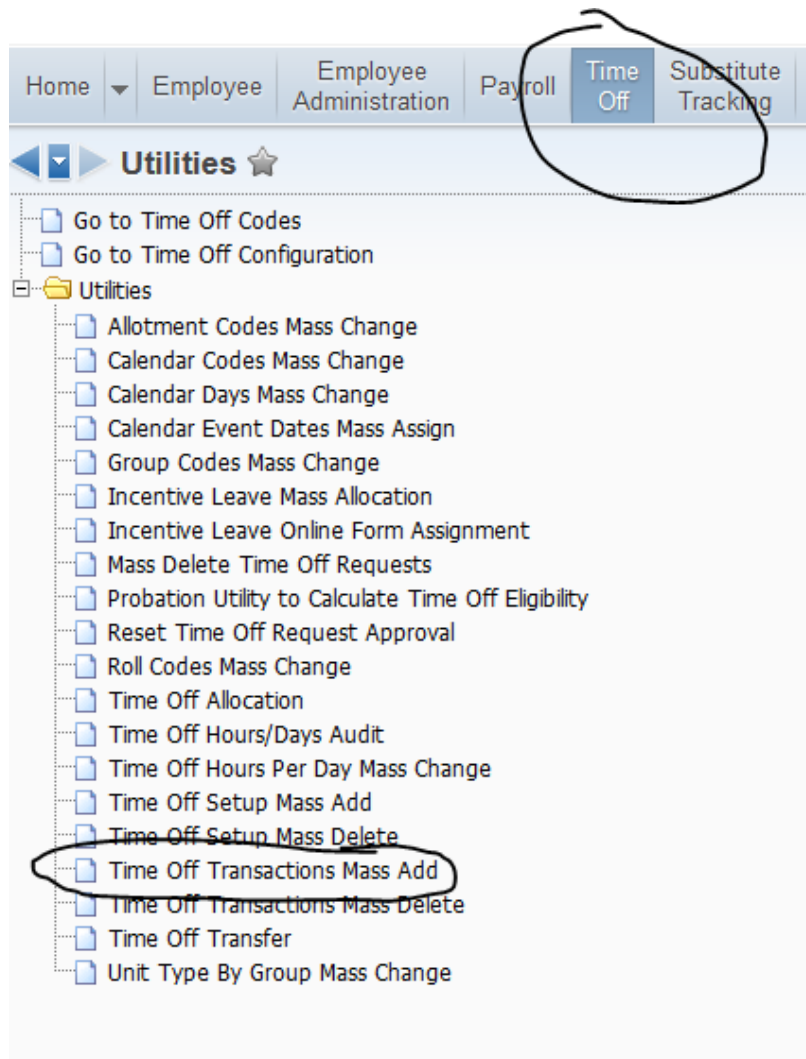
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Home Employee Employee Administration Payroll **Time Off** Substitute Tracking

**Utilities** ☆

- Go to Time Off Codes
- Go to Time Off Configuration
- Utilities
  - Allotment Codes Mass Change
  - Calendar Codes Mass Change
  - Calendar Days Mass Change
  - Calendar Event Dates Mass Assign
  - Group Codes Mass Change
  - Incentive Leave Mass Allocation
  - Incentive Leave Online Form Assignment
  - Mass Delete Time Off Requests
  - Probation Utility to Calculate Time Off Eligibility
  - Reset Time Off Request Approval
  - Roll Codes Mass Change
  - Time Off Allocation
  - Time Off Hours/Days Audit
  - Time Off Hours Per Day Mass Change
  - Time Off Setup Mass Add
  - Time Off Setup Mass Delete
  - Time Off Transactions Mass Add**
  - Time Off Transactions Mass Delete
  - Time Off Transfer
  - Unit Type By Group Mass Change



## Selection Parameters

-I only add similar employee types together AND one leave code at a time.

-If you are allocating leave August 20th, move your prior year terms who are still receiving a check to a bogus check location (930) and filter those out. This will avoid giving terms leave.

Employee Selection Parameters - WH\TO\PS\UT\TR - 30609 - 05.17.06.00.09 - Mozilla Firefox

https://pbroker1.skyward.com:489/scripts/cgiip.exe/WService=11509web/hparmedit001.w?hHpapsmId=0&isPopup=true

### Employee Selection Parameters

\* Description: Aide

Employee Selection By:  Employee Ranges  
 Individual Employees  
 Processing List

Buttons: Save, Save and Select, Back, Reset to Defaults

#### Employee Ranges

Name Key Range: Low High  
 zzzzzzzzzzzz

Inactive Profiles should be:  Included  Excluded  Processed Alone

Codes: [Select Employee Types](#)

Employee Building	AID11 - AIDE 11 MONTHS
Employee Check Location	
Employee Type	

#### Additional Codes and Settings

Codes: [Select Time Off Codes](#)

Time Off Codes	LOCAL - LOCAL PERSONAL LEAVE
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Asterisk (\*) denotes a required field

## Report of Hours Added

-notice only 37.5 hours were added

Time Off Transactions Mass Add Preview - WH\TO\PS\UT\TR - 30609 - 05.17.06.00.09 - Mozilla Firefox

https://pbroker1.skyward.com:489/scripts/cgiip.exe/WService=11509web/htomabnrws001.w?isPopup=true

**Time Off Transactions Mass Add Preview**

Views: General Filters: \*Skyward Default

Employee Key	Employee Name	Group Code	Time Off Code	Trans. Date	Time Off Amount	Used Allocated	Hours Days	Reason Code	Description	
ABBOTAUD001	Abbotscr Audra G	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	<a href="#">Edit Record</a>
ARELSYAN001	Arelscr Yan G	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	<a href="#">Remove Record</a>
BAKEWTWI001	Bakewellscr Twila H	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	<a href="#">Report</a>
BOGARWAI001	Bogardusscr Wai H	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	<a href="#">Back</a>
BORJAHIL001	Borjasscr Hilary H	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
BUCKEPEG001	Buckerscr Peggy H	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
CALCADEL001	Calcagniscr Dela I	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
EINHOFRE001	Einhomscr Freddie K	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
FAWSCLOR001	Fawscr Loretta L	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
FONDAHAT001	Fondascr Hattie L	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
FRENZWIL001	Frenzelscr Willa L	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
LIMBASAL001	Limbaughscr Sally S	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
PLOTINDAN001	Plotnerscr Danielle W	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
VANOSKAR001	Vanostrandscr Kara C	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
VEZEZYOL001	Venezianoscscr Yolande C	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
VILLENIA001	Villescasscr Nia C	1	LOCAL	09/01/2017	40.0000	A	D	ALLOC	Annual Allocation	
YETMAKRI001	Yetmanscr Kristin E	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
ZACCATAS001	Zaccariascscr Tasha F	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
ZUKSCNIT001	Zukscr Nita F	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	
ZUPANTER001	Zupanscr Teresa A	1	LOCAL	09/01/2017	37.5000	A	D	ALLOC	Annual Allocation	

## Leave allocated

Employee:         User Name:  Name ID:

Building:  Check Location:

[Customize](#)

Gender:  Age:  Hire Date:  Birth Date:

### Time Off Transactions Details

#### Filter Options

Transaction Display:  Show Groups  Show Codes  Show Detail Display most recent:  Last  First

Date Range:  through:   Include "Prior To" Amount

FMLA:  Include  Exclude  Process Alone

#### Transaction Details

Grp	Code	Date	Comment	Allocated	Used	Left	Unpaid	LTD
1	LOCAL	09/01/2017	Annual Allocation	37.5000				
1	LOCAL	-----	LOCAL PERSONAL LEAVE	37.5000		37.5000		
1	----	-----	LOCAL LEAVE	37.5000		37.5000		
2	STPER	07/01/2015	AUTOMATIC	5.0000				
2	STPER	09/10/2014	PERSONAL		1.0000			
2	STPER	07/01/2014	AUTOMATIC	5.0000				
2	STPER	07/01/2014		5.0000				
2	STPER	07/01/2014	AUTOMATIC	-5.0000				



## Time Sheet Leave Requests

-AESOP- import a date range to Skyward, clear errors, then run the update. This posts transactions to their leave balances.

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Daily Totals			
	Status	Note	Hours
<b>Monday 07/31/17</b>			
5:51 AM - 11:07 AM	IN		5h 16m
11:07 AM - 11:38 AM	LNCH		0h 31m
11:38 AM - 2:29 PM	IN		2h 51m
<b>07/31/17</b>			<b>Total Hours: 8h 07m</b>
<b>Tuesday 08/01/17</b>			
5:44 AM - 11:26 AM	IN		5h 42m
11:26 AM - 11:54 AM	LNCH		0h 28m
11:54 AM - 2:25 PM	IN		2h 31m
<b>08/01/17</b>			<b>Total Hours: 8h 13m</b>
<b>Wednesday 08/02/17</b>			
N/A	TOF	Local Leave 12 Mo	8h 00m
<b>08/02/17</b>			<b>Total Hours: 8h 00m</b>
<b>Thursday 08/03/17</b>			
N/A	TOF	Local Leave 12 Mo	8h 00m
<b>08/03/17</b>			<b>Total Hours: 8h 00m</b>
<b>Friday 08/04/17</b>			
5:42 AM - 11:28 AM	IN		5h 46m
11:28 AM - 11:57 AM	LNCH		0h 29m
11:57 AM - 2:00 PM	IN		2h 03m
<b>08/04/17</b>			<b>Total Hours: 7h 49m</b>

## Run Time Off Reports

-go to Time Off>Reports>Detail Transaction Report

Detail Transaction Report - WH\TO\RE\DT - 12970 - 05.17.06.00.09 - Mozilla Firefox

https://pbroker1.skyward.com:489/scripts/cgiip.exe/WService=11509web/rtimeedit007.w?isPopup=true

### Detail Transaction Report

**Template Settings**

\* Template Description: **Local Leave Balances**

Share with other users in the district

Print Greenbar

Report Format:  Detail  **Summary**  Group

Report Sequence:  Regular  Building  Building/Page Break

Date Option:  Use Today's Date  Use Date Range **09/01/2014** through **08/31/2015**

Note: All report options will print transactions that fall within the date range specified above.  
Beginning balance will be a summary of the transactions prior to the specified low date.

Print all employee/code information - prints beginning balance

Print only employee/codes that have transactions within the date range

Print beginning balance

Select Employee/Codes Exceeding Specified Units Used

Do not select based on units

Selection based only on hours used

Selection based only on days used

Include only Employee/Time Off codes with a negative balance

Include Long-Term Disability Leave Type Time Off Transaction Entries

Include  Exclude  Report Only LTD

Include FMLA Leave Type Time Off Transaction Entries

Include  Exclude  Report Only FMLA

Only print people with FMLA amounts over  hours

Convert FMLA days to hours

Page Break by Employee

Print Social Security Number

Print "Grand Total Hours" and/or "Grand Total Days"

Print time off code totals broken down by group at the end of the report

\* Selection Parameters: **Local Leave**

Asterisk (\*) denotes a required field.





## FMLA Forecast

-This is used to determine the total amount an employee will be docked once all leave has been exhausted. This amount is used to dock instead of the dock amount that Skyward will calculate. Any records that Skyward creates either through AESOP, True Time or other is deleted after imported. This will keep the employee from being double docked.

### FMLA PAY FORECAST

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

DATES EXPECTED TO BE OUT: \_\_\_\_\_ - \_\_\_\_\_

NUMBER OF DAYS EXPECTED TO BE OUT: \_\_\_\_\_

TRANSLATED INTO HOURS: \_\_\_\_\_

BALANCE OF HOURS TO USE FROM YOUR BANK: \_\_\_\_\_

LOCAL \_\_\_\_\_  
 STATE \_\_\_\_\_  
 CALNDR \_\_\_\_\_  
 OTHER \_\_\_\_\_

LAST LEAVE WAS POSTED: \_\_\_\_\_

TOTAL HOURS AVAILABLE \_\_\_\_\_

HOURS TO BE USED: \_\_\_\_\_  
 HOURS EARNED: \_\_\_\_\_ -

TOTAL HOURS TO BE DOCKED: \_\_\_\_\_ X

DAILY RATE OF PAY: \_\_\_\_\_ TRANSLATED INTO HOURLY RATE: \_\_\_\_\_ = \_\_\_\_\_ AMOUNT TO BE DOCKED

NUMBER OF CHECKS TO SPREAD OVER: \_\_\_\_\_ = \_\_\_\_\_ AMOUNT TO DOCK PER CHECK

OR

AMOUNT PREVIOUSLY DOCKED \_\_\_\_\_ = \_\_\_\_\_ REMAINDER TO DOCK OVER \_\_\_\_\_ CKS= \_\_\_\_\_ PER CHECK.

# Sample FMLA Forecast



FMLA PAY FORECAST      CDC

*gender too early*

NAME: [REDACTED]

DATE: 8-15-17

DATES EXPECTED TO BE OUT: (Sat) 2-17-18 - (Fri) 5-18-18

NUMBER OF DAYS EXPECTED TO BE OUT: 58      TRANSLATED INTO HOURS: 464

BALANCE OF HOURS TO USE FROM YOUR BANK:

LOCAL	<u>73.25</u>	LAST LEAVE WAS POSTED:	<u>16-17</u>
STATE	<u>69.25</u>		
CALNDR	_____		
OTHER	_____		

TOTAL HOURS AVAILABLE 142.50

HOURS TO BE USED: 464  
HOURS EARNED: 142.50

DAILY RATE OF PAY: 124.32      TOTAL HOURS TO BE DOCKED: 321.50x  
TRANSLATED INTO HOURLY RATE: 15.54 = 4996.11  
AMOUNT TO BE DOCKED

NUMBER OF CHECKS TO SPREAD OVER: 6 = 832.68 AMOUNT TO DOCK PER CHECK

OR March 15, 2018 - May 31, 2018

AMOUNT PREVIOUSLY DOCKED \_\_\_\_\_ = \_\_\_\_\_ REMAINDER TO DOCK OVER \_\_\_\_\_ CKS= \_\_\_\_\_ PER CHECK.

\*NOTE WE HAVE MADE EVERY EFFORT TO ACCURATELY REPRESENT YOUR PAY WHILE ON LEAVE. PLEASE NOTE THAT THIS IS ONLY AN ESTIMATE OF YOUR PAY AND CAN BE SUBJECT TO CHANGE BASED ON LEAVE BALANCES & RETURN DATE.

\*\*NOTE IF YOU ARE OUT MORE OR LESS DAYS THAN EXPECTED, THIS WILL CHANGE THE AMOUNT OF HOURS USED AND THE AMOUNT OF THE DOCK.

End of presentation –  
Extra space for other notes

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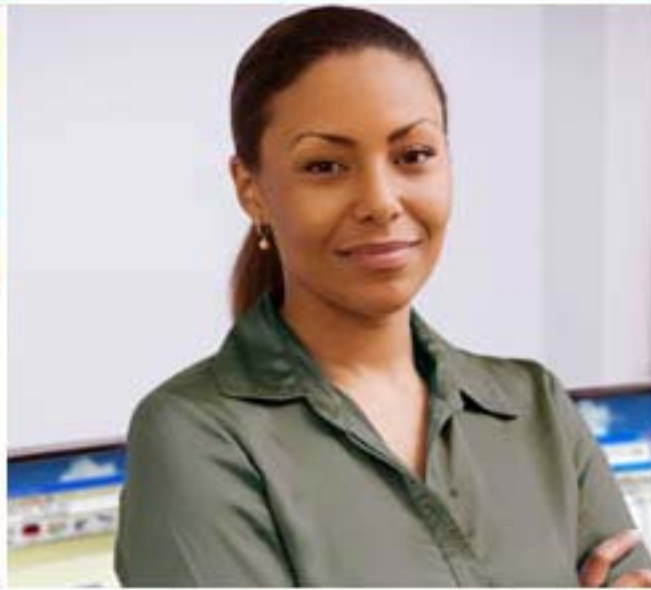
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**THANK YOU FOR ATTENDING!**

