

Texas Skyward User Group Conference

# Time Off Reporting & Other Options

Lori Johnson



# Time Off Reporting



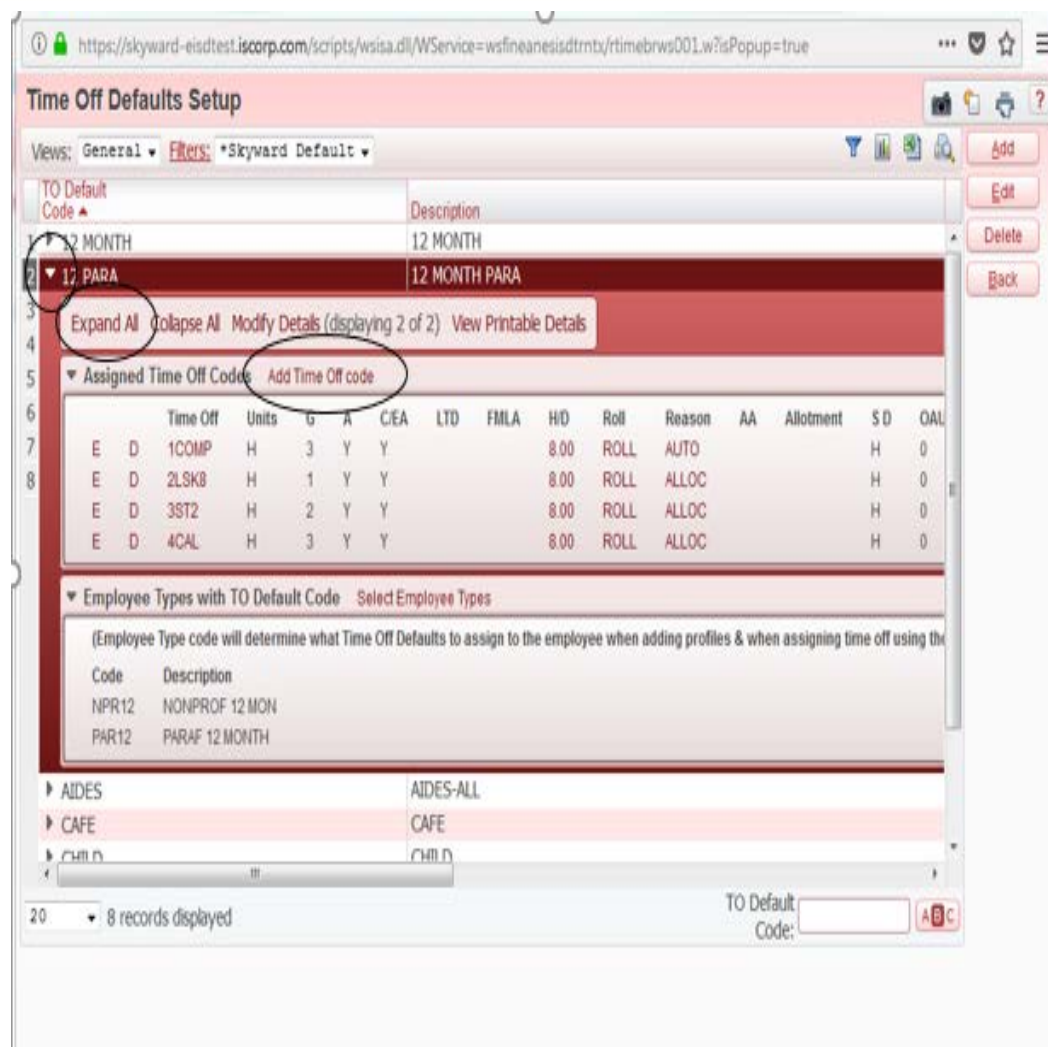
## Session Summary

- Create default time off records for employee types
- Add allocated hours for employees
- Hours from True Time or AESOP
- Run reports
- FMLA forecast for employee's 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>Configuration>Time Off Default Setup



The screenshot shows the 'Time Off Defaults Setup' web application. The interface includes a navigation bar with 'Views: General' and 'Filters: \*Skyward Default'. The main content area is divided into several sections:

- TO Default Code List:** A table with columns 'TO Default Code' and 'Description'. It lists '12 MONTH' and '12 MONTH PARA'. The '12 MONTH PARA' row is expanded, showing options: 'Expand All', 'Collapse All', 'Modify Details (displaying 2 of 2)', and 'View Printable Details'.
- Assigned Time Off Code:** A table with columns: 'Time Off', 'Units', 'G', 'A', 'C/EA', 'LTD', 'FMLA', 'HD', 'Roll', 'Reason', 'AA', 'Allotment', 'SD', and 'OAL'. It lists four codes: 1COMP, 2LSKB, 3ST2, and 4CAL.
- Employee Types with TO Default Code:** A section titled 'Select Employee Types' with a sub-header '(Employee Type code will determine what Time Off Defaults to assign to the employee when adding profiles & when assigning time off using the'. It lists two employee types: 'NPR12 NONPROF 12 MON' and 'PAR12 PARAF 12 MONTH'.
- Other Employee Types:** A list of other employee types including 'AIDES AIDES-ALL', 'CAFE CAFE', and 'CHM D CHM D'.

At the bottom of the page, there is a status bar showing '20 8 records displayed' and a 'TO Default Code:' input field with an 'ABC' button.

## Mass Allocate Leave to Employee Types

Time Off>Set Up> Utilities>Time Off Transactions Mass Add

---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



---



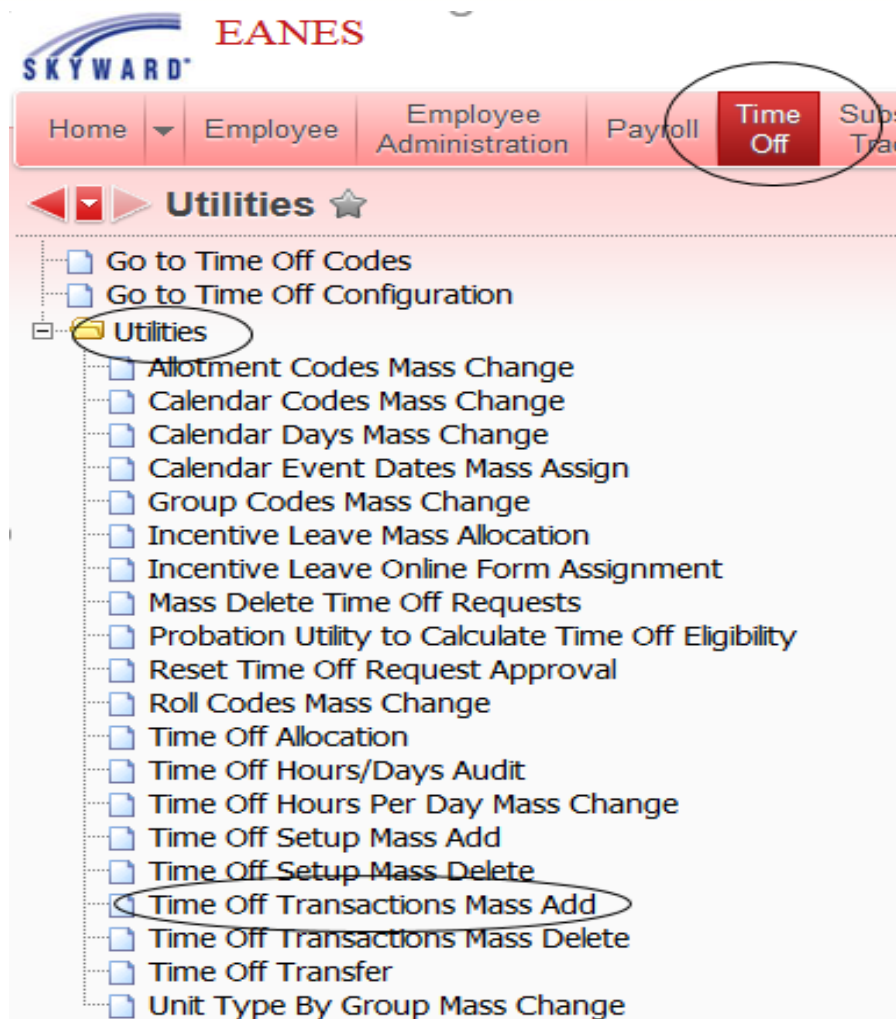
---



---



---



The screenshot shows the SKYWARD EANES software interface. The top navigation bar includes 'Home', 'Employee', 'Employee Administration', 'Payroll', 'Time Off', and 'Subs Trac'. The 'Time Off' menu item is circled in red. Below the navigation bar, the 'Utilities' section is expanded, showing a list of options. The 'Utilities' folder is circled in yellow, and the 'Time Off Transactions Mass Add' option is circled in red.

- Home
- Employee
- Employee Administration
- Payroll
- Time Off**
- Subs Trac

**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

## Create Template

I process my leave by employee types, leave codes & by how much I am allocating.

**Time Off Transactions Mass Add**

**Template Settings**

\* Template Description: 10 Month Employees 1LOCS  
 Share with other users in the district

**Employee Parameters**

\* Time Off: 2LSK6 LOCAL LEAVE 10 MO  
 \* Type: A - Allocated  
 \* Date: 08/01/2018  
 Reason: ALLOC ANNUAL ALLOCATION  
 Description: Annual Allocation  
 Enter Amount in Days  
 Amount: 25.0000 Hours  
 Prorate time off based on: 8.0000 Full Time Hours per Day  
 Create time off transaction for time off setup records that are:  Active  Inactive  Both  
 Hire Date Range: to: 09/01/2018  
 Include people with blank hire dates  
 Sick Bank:  Process Regardless of Flag  Sick Bank Participants Only  Exclude Sick Bank Participants

**Employee Parameters**

\* Selection Parameters: Busdrivers & Monitors only

Asterisk (\*) denotes a required field

## Selection Parameters

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

https://skyward-eisdtest.iscorp.com/scripts/wsisadll/WService=wsfineanesisdtrmtx/hp

### Employee Selection Parameters

Description: TRNS

Employee Selection By:  Employee Ranges  
 Individual Employees  
 Processing List

#### Employee Ranges

Low High  
 Name Key Range:

Inactive Profiles should be:  Included  Excluded  Processed Alone

Codes: **Select Employee Type:**

Employee Building	BSD20 - BUS DRIVER 2.0 HRS
Employee Check Location	BSTNR - BUS DRIVER TRAINER
Employee Type	BUSDR - BUS DRIVER

#### Additional Codes and Settings

Codes: **Select Time Off Codes:**

Time Off Codes	2LSK6 - LOCAL LEAVE 10 MO
----------------	---------------------------



## Report of Hours Added

You can edit an employee's hours from this screen or delete someone that you know just termed, before you update.

Time Off Transactions Mass Add Preview

Views: General Filters: Skyward Default Clone

	Employee Key	Employee Name	Group Code	Time Off Code	Trans. Date	Time Off Amount	Used Allocated	Hours Days	Reason	
1	ACEVEVAL000	ACEVEDO VALERIE JEANNE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	Edit Record
2	BAUM TH000	BAUM THOMAS A	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	Remove Record
3	BONNESTE001	BONNER STEPHEN J	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	Report
4	CAULERON000	CAULEY RONALD S	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	Back
5	CROUSROY000	CROUSE ROY G	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
6	DIEZ CIN000	DIEZ CINDY RENE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
7	HINCHJ0H000	HINCHCLIFFE JOHN WILLIAM	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
8	HOA HUY000	HOA HUYNH T	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
9	JARAMNUB000	JARAMILLO NUBIA ROJAS	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
10	KROLLTH0001	KROLL THOMAS RICHARD	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
11	LA BAREV000	LA BADIE KEVIN L	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
12	LORD LIS000	LORD LISA MARIE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
13	MERTEPET000	MERTEN PETRA	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
14	MOOREJAM000	MOORE JAMES LESLIE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
15	MOTASHI000	MOTHA SHIRALI H	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
16	OESTRKER000	OESTRICK KERRY C	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
17	RICKSTAM000	RICKS TAMELA GAYLE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
18	ROBERMAR000	ROBERTSON MARCIA LYNNE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
19	ROZELROG000	ROZELL ROGER LEE	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
20	SANCHROG001	SANCHEZ ROGER BERNARD	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	
21	SOPERJAM001	SOPER JAMES C	1	2LSK6	08/01/2018	25.0000	A	H	ALLOC	

100 24 records displayed Employee Key:  ABC

## Leave allocated

Employee: PEROTDAR000 [Redacted] [Navigation] Ranges Add Delete Notes \*Attach \*History

Employee Type: BUS DRIVER User Name: dperot Name ID: 34160  
 Building: TRANS 5HR Check Location: TRANSPORTATION

Customize

Gender: F Age: 69 Hire Date: 08/21/2014 Birth Date: 02/07/1949 SSN: [Redacted] Name: VALENTINE

### Time Off Transactions Details

Filter Options Apply

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

Date Range: [ ] through: 12/31/9999  Include "Prior To" Amount Reset

FMLA:  Include  Exclude  Process Alone

### Transaction Details

	Grp ▲	Code	Date	Comment	Allocated	Used
1	1	2LSKS	08/01/2018	ANNUAL ALLOCATION	25.0000	
2	1	2LSKS	01/16/2018	ICE DAY	5.0000	
3	1	2LSKS	08/01/2017	ANNUAL ALLOCATION	25.0000	
4	1	2LSKS	08/01/2016	ANNUAL ALLOCATION	25.0000	
5	1	2LSKS	08/01/2015	ANNUAL ALLOCATION	25.0000	
6	1	2LSKS	11/19/2014			4.0000
7	1	2LSKS	11/18/2014			4.0000



## Time Sheet Leave Requests

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

\*local/\*state for TA's

We use True Time to track leave for hourly employees. Once the leave request is approved, it buckets to their leave banks.

Type	Pay	Note	Hours
Timeoff	PARA (PARA)	COMP TIME	7h 15m
Timeoff	PARA (PARA)	STATE (S.B.1)	8h 00m
Work	PARA (PARA)		24h 41m
			<b>Total Hours: 39h 56m</b>
			<b>Hours Paid: 40h 00m</b>

### Daily Totals

Status	Note	Hours
<b>Monday 03/19/18</b>		
N/A	TOF	State (s.b.1) 8h 00m
		<b>03/19/18 Total Hours: 8h 00m</b>
<b>Tuesday 03/20/18</b>		
N/A	TOF	Comp Time 7h 15m
		<b>03/20/18 Total Hours: 7h 15m</b>
<b>Wednesday 03/21/18</b>		
7:07 AM - 3:49 PM IN		8h 42m
		<b>03/21/18 Total Hours: 8h 42m</b>
<b>Thursday 03/22/18</b>		
7:14 AM - 3:09 PM IN		7h 55m
		<b>03/22/18 Total Hours: 7h 55m</b>
<b>Friday 03/23/18</b>		
7:14 AM - 3:18 PM IN		8h 04m
		<b>03/23/18 Total Hours: 8h 04m</b>

## Run Time Off Reports

Time Off > Reports > Detail  
Transaction Report

### Detail Transaction Report

📷
📄
🖨️
?

#### Template Settings

\* Template Description:

Share with other users in the district

Print Greenbar

Save
Save and Print
Back

Report Format:  Detail  Summary  Group

Report Sequence:  Regular  Building  Building/Page Break

Date Option:  Use Today's Date  Use Date Range

through

**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:

## FMLA Forecast

I use this form 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 record that Skyward will generate. 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. (next slide)

# Sample FMLA Forecast



## FMLA PAY FORECAST



**EANES**  
WEST LAKE  
INNOVATIVE SCHOOL DISTRICT

NAME: Lori Johnson

DATE: 8/28/2018

DATES EXPECTED TO BE OUT: 8/22/18-12/21/18 RETURN ON: Jan. 7, 2019

NUMBER OF DAYS EXPECTED TO BE OUT: 60

BALANCE OF DAYS TO USE FROM YOUR BANK:

	18-19
LOCAL	5
STATE	15
CALNDR	
OTHER	
	20

LAST LEAVE WAS POSTED: 4/27/2018

TOTAL DAYS AVAILABLE

20

DAYS TO BE USED: 60  
DAYS EARNED: 20 -

TOTAL DAYS TO BE DOCKED: 40 X  
DAILY RATE OF PAY 270.72 = 10828.80  
AMOUNT TO BE DOCKED

NUMBER OF CHECKS TO SPREAD OVER: 6 = 1804.80 AMOUNT TO DOCK PER CHECK  
**OR** September - February

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

\*NOTE PLEASE NOTE THAT THIS ONLY AN ESTIMATE OF YOUR PAY AND IS SUBJECT TO CHANGE BASED ON LEAVE BALANCES AND RETURN DATE. IF YOU ARE OUT MORE OR LESS DAYS THAN EXPECTED, THIS WILL CHANGE THE AMOUNT OF DOCK.

\*\*NOTE IF YOUR DOCK IS LARGER THAN YOUR GROSS PAY, YOU MAY NEED TO SELF-PAY ANY INSURANCES.

End of presentation –  
Extra space for other notes

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

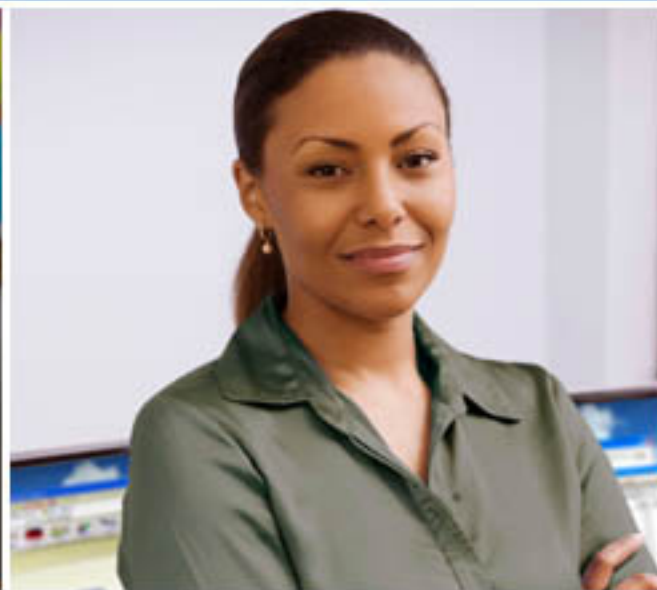
---

---

---







Texas Skyward User Group Conference

**THANK YOU FOR ATTENDING!**

