



Texas Skyward User Group Conference

HR Year End BootCamp

Lois King



Human Resources Year End BootCamp



This session will cover the items needed to wrap up the Year end in various areas that are typically carried out by the districts Human Resource Staff.

- Years of Experience update/increment
- Time Off Pay Out
- Service Records
- Time Off Year End Purge
- Sub Tracking – New Year Calendar Creation
- Sub Tracking Year End Purge
- Update Organizational Chart

Years of Experience – Increment
 When is the best time to run this process? What is it used for?

Increment Years of Experience

Template Settings
 * Template Description:
 Share with other users in the district

Utility Parameters
 Increment by Nbr of Days:
 Select Date: Hire Date Start Date Combine Days on All Assignments in Selected Plans

 Include Blank Hire Dates
 Plan:
 * If a plan is not selected neither the Number of Days or Placements will be included in the processing parameters.
 * Selection Parameters:

Codes Parameters
 Select Years of Experience Values

| Description | Index |
|---|-------|
| <input checked="" type="checkbox"/> Princ-Total Years | 1 |
| <input type="checkbox"/> Princ-Years at Curr Bu | 2 |
| <input type="checkbox"/> District Experience | 3 |
| <input type="checkbox"/> Prev District Experienc | 4 |
| <input type="checkbox"/> City Experience | 5 |

5 records displayed Description:

Select Placements




| Description | Code |
|--|---------|
| <input checked="" type="checkbox"/> BILINGUAL INCREMEN | BILINGU |
| <input type="checkbox"/> CONTRACT PLACEMENT | CON |
| <input type="checkbox"/> PRIMARY PLACEMENT | PRIPL |
| <input type="checkbox"/> PRIPL | Local09 |
| <input type="checkbox"/> SECONDARY PLACEMENT | SECON |

7 records displayed Description:

Include Assignments with no Placement Code

Run the Detail Transaction Report to get balances as of year end.

Detail Transaction Report

Template Settings

* Template Description: **Comp Time Balance YE**

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 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:

Asterisk (*) denotes a required field

Options for Payout – Manually create worksheet or use the Web Option process called Time Off Buy Back

| Worksheet Master | | | Detail for Selected Worksheet Master | | | | |
|-----------------------------|------------------|------------------|--------------------------------------|----------|----------|--------|--------------|
| Description | Last Import Date | Last Import Time | * Employee Name | Emp Type | Pay Code | Amount | Factor, Hour |
| 0- Time Off Unpaid Leave KL | 02/06/2018 | 2:07:14 PM | | | | | |
| 0. Comp Time Payout | | | | | | | |
| 0. Import TO Dock | | | | | | | |
| 0. True Time Test KR | 08/10/2018 | 3:57:39 PM | | | | | |
| 1-AFTER SCHOOL | 10/03/2016 | 6:03:30 PM | | | | | |
| 1-BUS COACH | 10/05/2016 | 5:19:13 PM | | | | | |
| 1-BUS DOCKS | 03/04/2016 | 11:26:10 AM | | | | | |
| 1-BUS EXTRA | 08/24/2017 | 10:26:40 AM | | | | | |
| 1-BUS HBMET,HBFD,HBTRV,SUBB | 08/10/2018 | 3:57:39 PM | | | | | |
| 1-CAFE EXTRA & DOCKS | 03/04/2016 | 11:26:17 AM | | | | | |
| 1-CAFETERIA SUBS APRIL 15TH | 03/04/2016 | 11:26:41 AM | | | | | |
| 1-CUSTODIAL SUBS APRIL 15TH | 03/04/2016 | 11:26:41 AM | | | | | |
| 1-DOCK APRIL 15TH | 01/02/2018 | 12:18:57 PM | | | | | |
| 1-EXTRA DUTY | 08/24/2017 | 8:55:07 AM | | | | | |
| 1-FEDERAL GRANT | 08/24/2017 | 8:55:07 AM | | | | | |
| 1-GATE WORKERS | 08/24/2017 | 8:55:08 AM | | | | | |
| 1-SUBSTITUTES | 03/04/2016 | 11:26:45 AM | | | | | |
| 1-TUTORING | 08/24/2017 | 8:55:10 AM | | | | | |
| 1-ZZ BUS APRIL 3/15 - 4/4 | | | | | | | |
| 2-BUS EXTRA | 03/25/2014 | 3:47:00 PM | | | | | |
| 2-CAFE EXTRA & DOCKS | 03/25/2014 | 3:47:01 PM | | | | | |
| 2-CAFETERIA SUBS APRIL 28TH | | | | | | | |

| Master | | Detail | |
|-------------------------------------|---------|--------------------------|-------|
| <input checked="" type="checkbox"/> | Select | <input type="checkbox"/> | Entry |
| | Clone | | |
| | Add | | |
| | Edit | | |
| | Delete | | |
| | Reset | | |
| | History | | |
| | Report | | |
| | Close | | |

Lookup: 0- Time Off Unpaid Leave KL * = record has been imported into payroll

Description to reposition the worksheet list.

Web Options SkyDoc

Sub Tracking – New Year Calendar Creation

Calendar Codes

Calendar Codes for Fiscal Year: 2018-2019

| Description ▲ | Code |
|------------------|------------|
| ▶ 176 DAY 2HR | 176 DAY 2H |
| ▶ 176 DAY 4HR | 176 DAY 4H |
| ▶ 176 DAY 8HR | 176 DAY 8H |
| ▶ 187 DAILY RATE | 187DR |
| ▶ 187 DAY 7.5HR | 187 PARA |
| ▶ 187 DAY 8HR | 187 DAY |
| ▶ 192 DAILY RATE | 192DR |
| ▶ 192 DAY 7.5HR | 192 PARA |
| ▶ 192 DAY 8HR | 192 DAY |
| ▶ 197 DAY 7.5HR | 197 PARA |

20 records displayed Description: ABC

Calendars in this color are active/inactive calendars for the daily rate option.



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

