

Texas Skyward User Group Conference

Time Off Reporting & Other Options

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Time Off Reporting



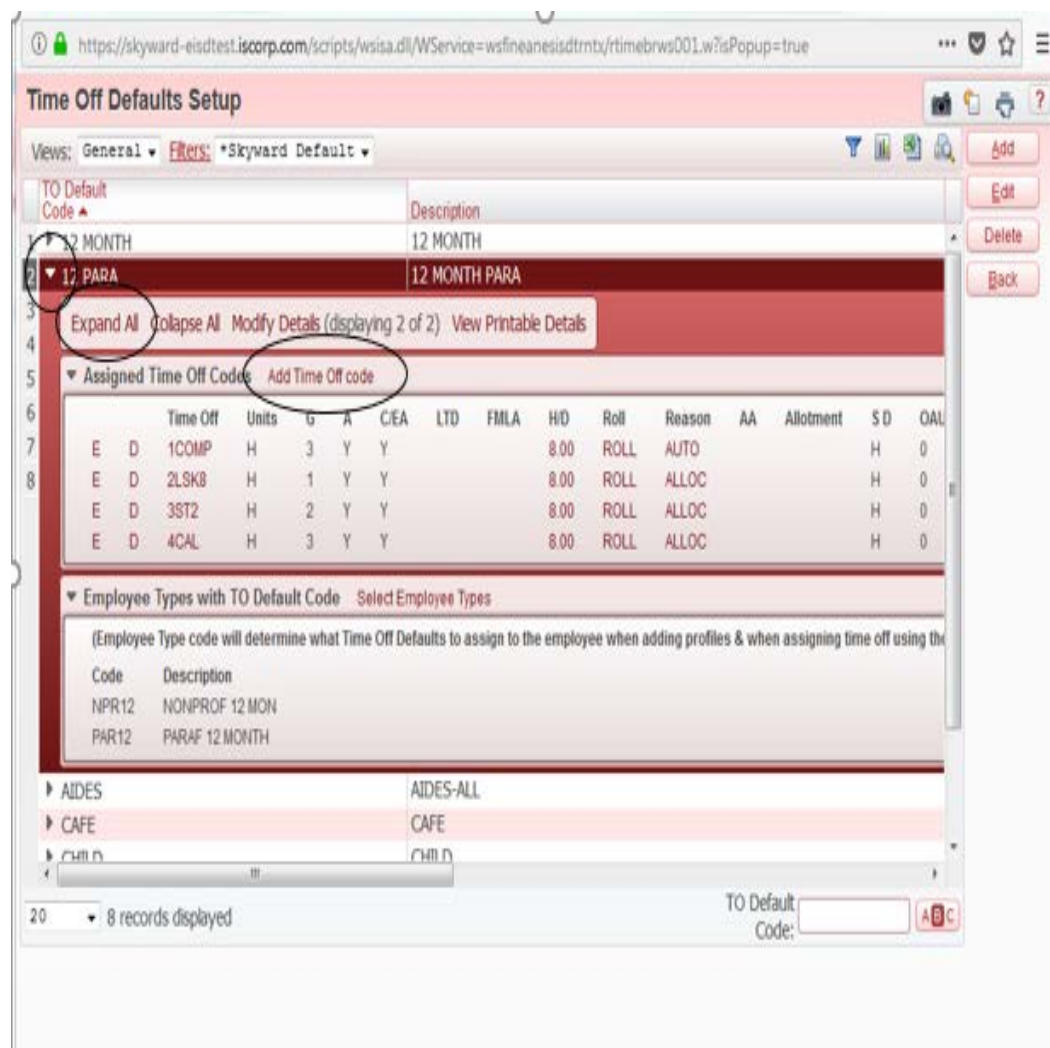
Session Summary

- Create default time off records for employee types
- Add allocated hours for employees
- Hours from True Time or AESOP
- Run reports
- 3rd party absence (setup)
- 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



Time Off Defaults Setup

Views: General Filters: *Skyward Default

TO Default Code	Description
12 MONTH	12 MONTH
12 MONTH PARA	12 MONTH PARA

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

Assigned Time Off Code Add Time Off code

Time Off	Units	G	A	C/EA	LTD	FMLA	HD	Roll	Reason	AA	Allotment	S D	OAL
E D 1COMP	H	3	Y	Y			8.00	ROLL	AUTO			H	0
E D 2LSKB	H	1	Y	Y			8.00	ROLL	ALLOC			H	0
E D 3ST2	H	2	Y	Y			8.00	ROLL	ALLOC			H	0
E D 4CAL	H	3	Y	Y			8.00	ROLL	ALLOC			H	0

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 profiles & when assigning time off using the

Code	Description
NPR12	NONPROF 12 MON
PAR12	PARAF 12 MONTH

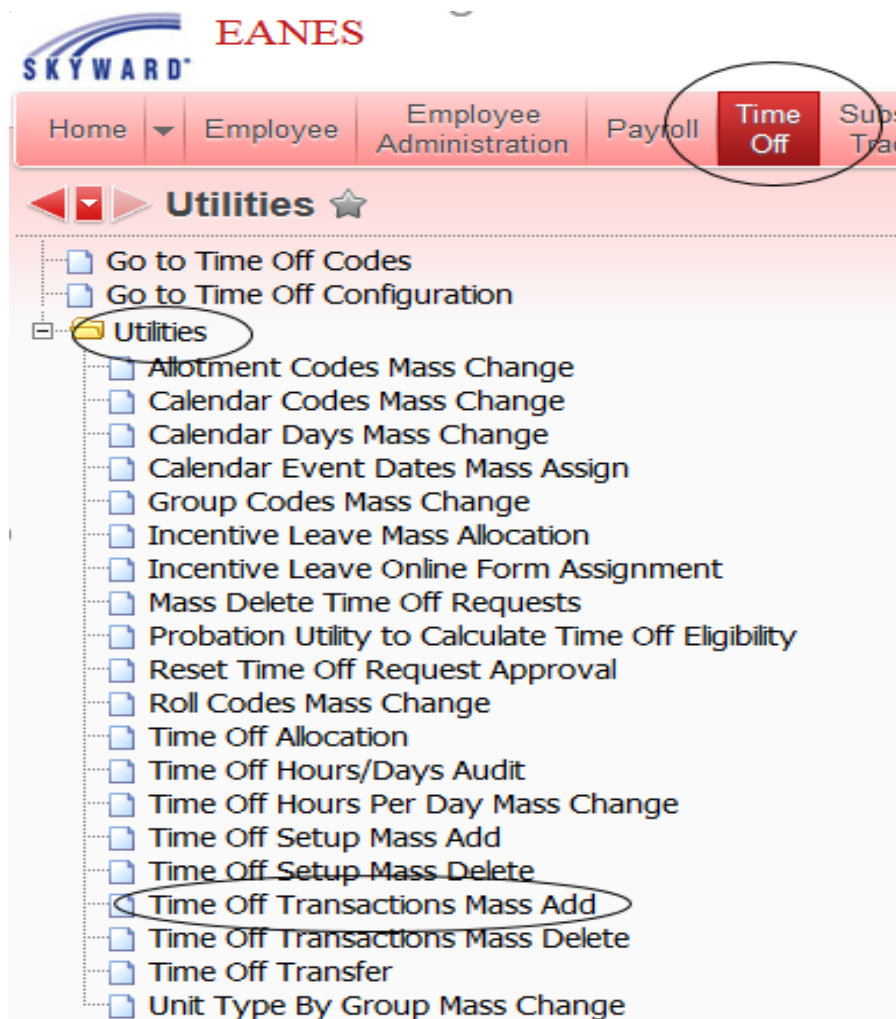
AIDES AIDES-ALL
 CAFE CAFE
 CHM D CHM D

TO Default Code:

8 records displayed

Mass Allocate Leave to Employee Types

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



The screenshot shows the SKYWARD EANES software interface. At the top, there is a navigation bar with tabs for Home, Employee, Employee Administration, Payroll, Time Off, and Subs Trac. The 'Time Off' tab is highlighted with a red circle. Below the navigation bar, the 'Utilities' section is expanded, showing a list of options. The 'Utilities' folder is highlighted with a yellow circle, and the 'Time Off Transactions Mass Add' option is highlighted with a red circle.

- 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:

Share with other users in the district

Employee Parameters

* Time Off: LOCAL LEAVE 10 MO

* Type:

* Date:

Reason: ANNUAL ALLOCATION

Description:

Enter Amount in Days

Amount: Hours

Prorate time off based on: Full Time Hours per Day

Create time off transaction for time off setup records that are: Active Inactive Both

Hire Date Range: to:

Include people with blank hire dates

Sick Bank: Process Regardless of Flag Sick Bank Participants Only Exclude Sick Bank Participants

Employee Parameters

* Selection Parameters:

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
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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 TH0000	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
			Total Hours: 39h 56m
			Hours Paid: 40h 00m

Daily Totals

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

Run Time Off Reports

Time Off > Reports > Detail
Transaction Report

Detail Transaction Report

📷
📄
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?

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

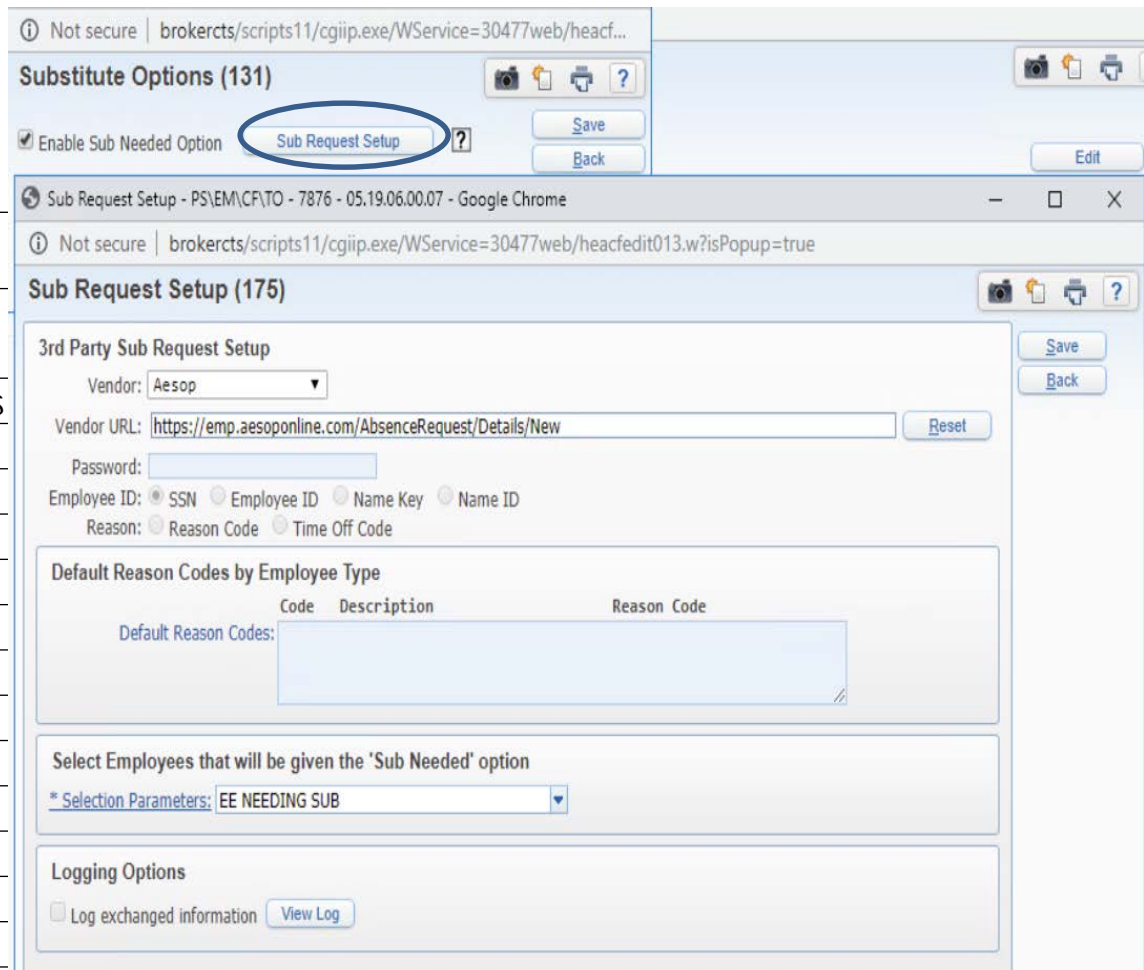
Print "Grand Total Hours" and/or "Grand Total Days"

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

* Selection Parameters:

Setup for Entering an Absence via Employee Access, then forward to 3rd Party for a Sub

Product Setup>Employee Access>Configuration>Time Off setup>Run>Substitute Options Sub Request Setup>Populate Fields



The screenshot shows two browser windows. The top window is titled 'Substitute Options (131)' and has a 'Sub Request Setup' button circled in blue. The bottom window is titled 'Sub Request Setup (175)' and contains the following configuration fields:

- 3rd Party Sub Request Setup**
 - Vendor: Aesop
 - Vendor URL: <https://emp.aesoponline.com/AbsenceRequest/Details/New>
 - Password: [Empty field]
 - Employee ID: SSN Employee ID Name Key Name ID
 - Reason: Reason Code Time Off Code
- Default Reason Codes by Employee Type**

Code	Description	Reason Code
Default Reason Codes: [Empty table area]		
- Select Employees that will be given the 'Sub Needed' option**
 - * Selection Parameters: EE NEEDING SUB
- Logging Options**
 - Log exchanged information [View Log](#)

Asterisk (*) denotes a required field

Second Area of Setup

Product Setup>HR>Time Off>Configuration>Time Off System Setup Options>Run

Time Off System Setup Options (86)

Time Off System Options

- Use Auto Accrual
- Use "unpaid" transaction type
 - After an unpaid time off transaction is entered, the system should create a "Dock" record in:
 - Pay Records
 - Worksheet Detail
 - Import to Worksheet [?](#)
- Allow Multiple Entries Per Day: Yes ▼
- Use reason code/time off code maximum amounts
 - Hourly Time Off Increment: 15 minute (00, 15, 30, 45) ▼
- Track Family Medical Leave
 - FMLA Start Month:
 - [FMLA Reason Codes:](#) *No Reason Codes
- Use Probation Utility to calculate Time Off eligibility

Substitute Setup [?](#)

- Show Substitute on Time Off Transactions
- Show Substitute on Time Off Requests

[Selection Parameters:](#) Substitute on Time Off ▼

Default Time Off Setup

- When adding a profile, give option to add Default Time Off setup based on Employee Type
- When importing from EM into payroll, give option to add Default Time Off setup based on Employee's Assignment

[Save](#)

[Back](#)

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 are 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

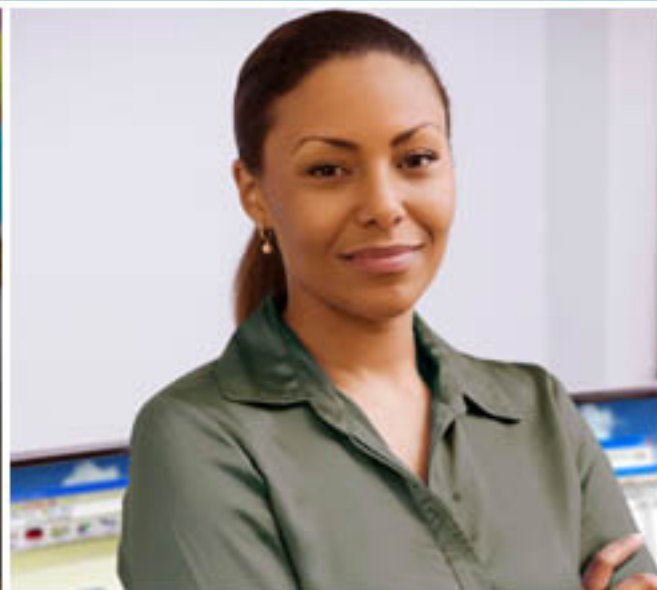
AMOUNT PREVIOUSLY DOCKED _____ = _____ REMAINDER TO DOCK OVER _____ CKS = _____ PER CHECK.

*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





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THANK YOU FOR ATTENDING!

