# Human Resource Module

Reports

Path: Human Resources/Reports

The Reporting routines allow your facility to generate reports which can be displayed on line, printed, or exported to Microsoft Excel. A wide variety of reports can be printed which encompass the areas of attendance, benefits, civil service, educational information, employee lists, evaluations, health, positions, contract and employee attendance confirmation letters, and fingerprinting.

Saving Reporting Criteria

Human Resources provides the option of saving criteria when you are running reports with the same selection ranges, sorting options, etc. on a continuing basis. The Save Criteria feature is useful in that you are creating a template containing specific criteria so that you do not have to retype the same criteria over and over again each time you run a report. Options are provided to create a private report accessible to only one user or to create guest reports that any user may access.
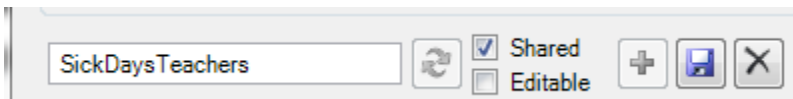
- Press the Add New Saved Criteria button at the bottom of the report window.
- Type the name of the report that will help you remember what criteria was chosen.
- Shared Checkbox
  - o Leave the Shared box unchecked if you will be the only user who should have access to this report.
  - o Check the Shared box to indicate that you want other users to be able to access this report.
    - ▪ Check the Editable box to indicate that you want other users to be able to modify the access level (Shared/NotShared) and the report name text.
- Click Save/Update Saved Criterias.

Attendance Reports

Accumulated Sick Leave Notice Report - The Accumulated Sick Leave Notice Report routine is used to generate employee notices denoting sick and other attendance allotments and balances based on the specified fiscal year.

Attendance Analysis - The Attendance Analysis Report routine is used to generate an analytical listing of patterns for attendance days taken during a selected date range. You can generate 5 types of analysis reports:
- Employees who had exactly or more than a specified number of absence events taken over non-consecutive and consecutive days during a selected reporting date range
- Employees who had exactly or more than a specified number of consecutive absences taken within the selected reporting date range
- Employees number of absences taken on a given weekday
- Employees who were absent the day before or after a holiday defined in their employee group calendar
- Employees who took absences on the same date when comparing two specified years

Attendance Detail - The Attendance Detail Report provides attendance record detail information for a selected employee(s) based on a specified date range. This report reflects all detail attendance records, including carry forward balances, accrual earned, days taken, days paid out, days donated to bank, and days taken from bank.

Attendance Profile - The Attendance Profile Report provides a list of employees along with the attendance start date and attendance profile name linked to each appointment. The report can be run for employees hired between a specified date range or for all hire dates.

Attendance Profile Rules Listing - The Attendance Profile Rules Listing is a printout of attendance rules for a specified fiscal year for all or selected employee groups, attendance profile groups, and attendance codes.

Attendance Worksheet - The Attendance Worksheet provides the ability to print a 7-day blank worksheet or review report based on a selected starting date. The 7-day blank worksheet allows building personnel to manually write down attendance information for a selected employee(s) which eventually can be recorded through the attendance routines. The 7-day review worksheet allows you to display the system-recorded employee attendance events based on the reporting start date.

Attendance On Leave Status - The Attendance On Leave Status Report provides the ability to print a list of those employees who are currently on and/or have returned from a leave of absence based on a specified reporting date range. Any leave of absence, recorded in HR Employee Information on the Leave of Absence tab under the Appointment Information folder, will be included in this report based on the selected reporting dates.

Compensated Absence Listing - The Compensated Absence Listing provides the ability to print a report indicating how much pay an employee(s) would be owed for any unused accrued time based on a specified date range. The amount of pay can be based on the employee's hourly or daily rate OR a specific set rate.

Daily Attendance Report - The Daily Attendance Report routine is used to generate a listing of attendance events recorded on a specific day or during a selected date range. The report provides the option of printing ALL attendance events entered [prior balances, annual accruals, carry forwards from other attendance codes, days taken, pay outs, days taken from bargaining unit bank, days donated to bank, and comp time recorded through the Time and Attendance process are included] OR taken/donated units only.

Donation Bank Detail - When recording units Donated or Taken from a Donation Bank through the Daily Attendance routine OR when the Record Global Donated Day Utility is performed, nVision prompts the user to select the Bank Group from which the units are to be donated or taken. The Donation Bank Detail Report then tracks the number of available units as time is donated or taken from the bank.

Employees Approaching Negative Balances - The Employees Approaching Negative Balances provides a listing of employees who are nearing a negative balance for a selected attendance bank where the Check Attendance Balance flag is set to YES. The report lists any employees having less than or equal to a specified number of days available in a selected attendance bank.

Employee Attendance Record - The Employee Attendance Record routine is used to generate a listing of attendance events recorded during a selected fiscal year date range. The report can be customized to display attendance detail records reflecting ALL attendance events entered [prior balances, annual accruals, carry forwards from other attendance codes, days taken, pay outs, days taken from bargaining unit bank (pool), days donated to bank, and comp time recorded through the Time and Attendance process are included], employee attendance balances by absent code, and/or absences breakdown by day of the week.

Employees with Negative Balances - The Employees with Negative Balances Report provides a listing of employees who already have a negative balance within the reporting date range for selected attendance banks where the Check Attendance Balance flag is checked. The report lists any employees who took more days than they have available in a selected attendance bank.

Monthly Attendance - The Monthly Attendance Report provides an analysis of time taken in selected attendance banks during a specified reporting period. Choose to include employees who did not take any days during the reporting period and/or to include sub-bank detail. The report displays the year-to-date prior, annual, taken, donated, taken from bank, and available amounts, as well as the amounts taken in the reporting period.

Perfect Attendance - The Perfect Attendance Report allows you to print a listing of employees having perfect attendance based on a selected attendance code(s) and reporting date range. The Attendance Code lookup provides the ability to indicate those codes that are to be included in perfect attendance. When selecting a specific attendance code that is to be included in perfect attendance and running the report for a specific employee group, any employees who have an attendance bank but DO NOT HAVE "days taken" for that attendance code will display on the report. This report is useful if your facility gives out awards for perfect attendance.

Time Summary Listing - The Time Summary Listing checks each appointment absent bank and provides an analysis of the prior balance, annual accrual, units donated to attendance bank/pool, units taken from attendance bank/pool, units taken, and units available in all or selected attendance banks based on the specified date range. Grand totals are provided on the last page of the report based on the reporting criteria selected.

Substitute Call Listing - The Substitute Call Listing is a report of individuals who can substitute for other employees. Employees can be substitutes if they are linked to employee groups where the Substitute flag is checked in Employee Group Setup. The report provides the employees' primary phone number and default building.

Substitute Listing - The Substitute Listing is a report of individuals who substituted for another employee during a specified date range. Subtotals of the number of days/hours worked in the reporting date range can be printed for each substitute.

YTD Attendance Balance Report - The YTD Attendance Balance Report provides a listing of individuals who donated or took time as of the current date or any specified date.

Benefit Reports

Benefit Census - The Benefit Census Report provides an up-to-date, alphabetical listing of employees who have benefits (e.g., health, dental, life insurance, disability, etc.) from a selected or all provider(s). The report provides additional options to include the employee's marital status, salary, and inactive benefits.

Benefit Listing - The Benefit Listing Report provides a listing of employee benefits which can be sorted by provider, benefit type (e.g., health, dental, life insurance, disability, etc.), coverage type (e.g., Individual, Family, Head of the Household, etc.), or employee name. The report provides additional options to include waived benefits and benefits that are active as of a specified date.

Employee Benefit Status - The Employee Benefit Status Report provides a history of active and inactive employee benefits (e.g., health, dental, life insurance, disability, etc.) from all provider(s), along with a listing of the employee's dependents who are covered under the benefits. The report provides an option to include/exclude waived benefits.

Employee Benefit Waived - The Employee Benefit Waived Report provides a listing of employees who have elected to waive health, dental, life insurance, or disability benefits from any provider.

Civil Service Reports

Civil Service Report - The Civil Service Report provides a listing of those non-instructional employees who have a civil service title linked to an active appointment and reflects the wages paid to those employees during a selected reporting date range. The report provides options to include or exclude the following information: hourly rate for Contractual/Annualized appointments, employees without earnings during the selected reporting period, Certification text on the last page, and employee social security number. You can choose to print only civil service wages or show civil service and total wages paid.

Civil Service Journal - The Civil Service Journal option prints the standard Payroll Transaction Journal but includes the employee's civil service code and civil service title. The report provides options to print summary or detail information, show only employees who have a civil service title, include the employee's social security number, and/or include inactive employees.

Education Reports

Approved Courses Pending - The Approved Courses Pending generates a report of courses that are being tracked through the Education window on the Professional Information folder in Employee Information and that have no GRADE specified and are considered pending or incomplete. If using Course Codes, a report can be generated for a selected course code(s) and/or a course type(s) (e.g., Graduate, Inservice, Undergraduate, etc.).

Employee Educational Listing - The Employee Educational Listing provides a list of coursework that is being tracked for the employee through the Education window on the Professional Information folder in Employee Information. Choose to restrict the report to employees within a selected employee group, building, and/or department. In addition, choose to include completed courses based on a selected date range and pending courses that have not yet been completed. The report can be sorted by employee name, employee number, employee group, or building.

PDP Course Listing - The PDP Course Listing allows you to generate a report containing coursework being tracked that apply to the employee's professional development plan. All the course records reflected on this report have PDP detail information entered on the Education tab under the Professional Information folder in Employee Information. The report provides the option to print the total number of clock hours for the certification code.

Employee Reports

Appointment Leave - The Appointment Leave routine is used to print a report of employees who have a leave of absence that began within the specified reporting date range and was recorded on the Leave of Absence tab under the Appointment Information folder in Employee Information. The report can be run by department, employee group, or position group.

Appointment Listing - The Appointment Listing routine is used to print a report of employee appointments based on selected criteria. The report can be run by department, employee group, or position group.

Birthday Listing - The Birthday Listing routine is used to print a report of employees and their birth dates, sorted in month and day order. Within each day, the report can be sorted alphabetically by employee name or numerically by employee number.

Date of Birth Listing - The Date of Birth Listing routine is used to print a report of employees and their birth dates, sorted in employee name, employee number, or date of birth order. Unlike the Birthday Listing, this report can display employees in order of oldest to youngest.

EEOC (EEOC-5) - This routine provides the ability to file a report to the Equal Employment Opportunity Commission when required. The appropriate EEOC Type is defined for each position in the Position Information table. The EEOC Type identifies the appropriate reporting line for the employee on the EEOC Report.

Employee Certification Listing - The Employee Certification Listing generates a report detailing the professional certification area and status for selected employees. Options are included to report on certifications achieved between a specified date range, certifications of a specific type (e.g., continuing, permanent, etc.), primary certifications only, certifications with blank dates, and/or blank certification types.

Employee Degree Listing - The Employee Degree Listing routine is used to print a report of employees whose professional degree information (e.g., BA – Bachelor of Arts, MA – Master of Arts, etc.) is being tracked in Employee Maintenance. The report provides the ability to print degree achievement information based on a selected degree completion date range.

Employee Dependent Listing - The Employee Dependent Listing provides a list of the names of employees' dependents. The report can be sorted by employee name, employee number, dependent name, or dependent date of birth.

Employee Directory - The Employee Directory Report provides a list of employee demographic information, including the employee address; primary position and position group' primary building, department, and employee group; and default phone number and email address. The report can be sorted by employee name, employee ID, department, position, employee group, or building.

Employee Fingerprint - The Employee Fingerprint Report routine provides the ability to print a listing of employee fingerprint records that are being tracked. The report can be run for employees in all or selected employee groups, buildings, and/or departments. Options are provided to generate the report based on all or selected fingerprint statuses within a specified date range. The report reflects fingerprinting tracking details and the corresponding dates for each step taken in the fingerprinting process.

Employee Evaluation - The Employee Evaluation Report routine is used to print a report of employees whose evaluations were pending and/or completed within a selected date range. Any employee evaluation record for which the Completion Date is entered is considered a completed evaluation. Any employee evaluation record for which the Completion Date is blank is considered a pending evaluation. The report can be sorted alphabetically by employee name, evaluation due date, or evaluation type.

Employee Hire Date - The Employee Hire Date routine generates a report which reflects employees with their hire or rehire date and calculated number of years in their primary position.

Employee License Information - The Employee License Information routine generates a report of employees who have a professional license based on the criteria selected. License data is stored in the employee record on the License tab under the Professional Information folder in Employee Information.

Employee Listing - The Employee Listing routine is used to print a report of employees, along with their employee number, social security number (optional), employee status, employee group, building, and department.

Employee Mailing Labels - The Employee Mailing Labels routine provides the ability to print one or multiple mailing labels for one employee or a range of employees in one, multiple, or all employee groups, buildings, and/or departments. The standard laser-printer label form for this routine is the Avery 5160 Address Label.

Employee Name Change - The Employee Name Change routine is used to print a report showing the names of employees who had their first or last name changed in the Employee Information table. The change could have occurred due to a legal name change after a marriage/divorce or a simple misspelling of the name.

Employee Notes - The Employee Notes Report allows you to print out the notes entered in the Attendance, Benefits, Certification, Dependents, Earnings, Education, Emergency, Employee Information, Evaluation, Fingerprint, Health, Health Notes, Retirement, Seniority, and Tenure windows of the employee record. Options are included to print notes for one, multiple, or all employees and notes for employees in one, multiple, or all employee groups, buildings, and departments.

Employee Teacher ID - The Employee Teacher ID Report allows you to print a listing of employees who have a teacher ID and/or a blank teacher ID on the Miscellaneous tab in the Personal Information folder in Employee Information.

Mortality - The Mortality Report is used to print a report of employees who are deceased. These employees are flagged as deceased on the Leave History window on the Appointment Information folder in Employee Information Data Entry. The report displays the employee's PRIMARY employee group, building, and department.

Personnel Files - The Employee Personnel Files Report provides a list of selected information from employee personnel records, including employee demographic, attendance, earnings, benefits, dependents, evaluation, education, retirement, emergency contact, health, civil service, tenure, certification, and position information. Choose to include or exclude any category of information, as well as any employee notes in the information categories selected.

Seniority - The Seniority Report is used to print a report of employees whose seniority information is being tracked based on civil service or tenure area as of a specified date. Employees MUST have a current year appointment and a Starting Date entry record on the Seniority folder under Appointment Information in Employee Information Entry to be included in this report. Options are provided to print a summarized or detailed Seniority Report. The Summary Report reflects the grand total number of seniority units [(prior balance plus any annual accrual) minus leave of absence] and equivalent seniority years for each tenure or civil service area. The Detail Report reflects each seniority detail record, including the starting date, along with a breakdown of the number of units in each prior balance, leave of absence, and annual accrual entry record, divisor used to calculate the number of seniority years, and equivalent seniority years for each tenure or civil service area.

Tenure Listing - The Tenure Listing routine is used to print a report of employees whose tenure area(s), probation starting and ending dates, and tenure effective dates you are tracking.

Health Reports

Employee Health Events - The Employee Health Events Report is used to generate a listing of any health requirements that either occurred during or are due between a specified date range. Health Events are recorded on the Health Events window on the Personal Information folder in Employee Information Entry. Examples of health events might include a Physical, Drug Test, Fingerprinting, etc.

Employee Health Notes - The Employee Health Notes Reports is used to generate a listing of any permanent and/or temporary health notes recorded for a selected employee(s). Notes are recorded on the Health Notes window on the Personal Information folder in Employee Information Entry. Examples of health notes might include that an employee has a broken leg and is temporarily on crutches or that an employee has a permanent handicapped parking sticker.

Position Reports

Position Account Breakdown - This report provides a position analysis by department, employee group, or position group and prints each position along with the associated payroll expense account code(s) and allocation percentage(s) for each account.

Position Buildings - The Position Buildings routine prints the positions in each building. Position information is grouped by department, employee group, or position group. The position occupancy percentage per building is also provided.

Position FTE Breakdown - The Position FTE Breakdown report provides a full time equivalent analysis for each position. Position information is grouped by department, employee group, position group, building, or account. The Detail Report option provides the employee ID and occupant name in each position.

Position History - The Position History routine tracks the start and end dates of occupants in each position. Position information is grouped by department, employee group, or position group.

Position Listing - The Position Listing routine prints the positions in your facility based on selected criteria. The report provides hours per day, days per year, hours per year, vacancy salary and position FTE information. Position information is grouped by department, employee group, or position group.

Position Requirement - The Position Requirement routine tracks the degree, certification, civil service, health event, and/or license requirements necessary for the positions being reported on. Requirements are defined in the Position Information table. Position information is grouped by department, employee group, or position group.

Position Requirement Fulfillment - The Position Requirement Fulfillment tracks the status of requirement completion for each position. Position requirements are defined in the Position Information File. Position information is grouped by department, employee group, or position group.

Position Surplus - The Position Surplus tracks any surplus amounts based on the total number of positions in the Position Information File and the number of positions already filled. Position information is grouped by department, employee group, or position group.

Position Vacancy - The Position Vacancy routine tracks those positions that need to be filled based on the total number of positions defined in the Position Information File and the number of positions already filled. Information is grouped by department, employee group, or position group.

Setup Reports

Bargaining Unit Listing - The Bargaining Unit Listing routine is used to generate a report containing the bargaining unit codes from the setup table.

Benefit Coverage Type Listing - The Benefit Coverage Type Listing routine is used to generate a report containing the benefit coverage types from the setup table.

Benefit Group Listing - The Benefit Group Listing routine is used to generate a report containing the benefit group codes from the setup table.

Certification Code Listing - The Certification Code Listing routine is used to generate a report containing the certification codes from the setup table.

Certification Type Listing - The Certification Type Listing routine is used to generate a report containing the certification types from the setup table.

Civil Service Code Listing - The Civil Service Code Listing routine is used to generate a report containing the civil service codes from the setup table.

Civil Service Type Listing - The Civil Service Type Listing routine is used to generate a report containing the civil service type codes from the setup table.

COBRA Code Listing - The COBRA Code Listing routine is used to generate a report containing the COBRA codes from the setup table.

Course Code Listing - The Course Code Listing routine is used to generate a report containing the course codes from the setup table.

Course Type Listing - The Course Type Listing routine is used to generate a report containing the course types from the setup table.

Degree Code Listing - The Degree Code Listing routine is used to generate a report containing the degree codes from the setup table.

Department Listing - The Department Listing routine is used to generate a report containing the department codes from the setup table.

Dependent Type Listing - The Dependent Type Listing routine is used to generate a report containing the dependent types from the setup table.

Employee Group Listing - The Employee Group Listing routine is used to generate a report containing the employee groups from the setup table.

Evaluation Type Listing - The Evaluation Type Listing routine is used to generate a report containing the evaluation type codes from the setup table.

Fingerprint Status Listing - The Fingerprint Status Listing routine is used to generate a report containing the fingerprint status codes from the setup table.

Grade Level Listing - The Grade Level Listing routine is used to generate a report containing the grade levels from the setup table.

Health Event Type Listing - The Health Event Type Listing routine is used to generate a report containing the health event types from the setup table.

Leave Type Listing - The Leave Type Listing routine is used to generate a report containing the leave types from the setup table.

License Code Listing - The License Code Listing routine is used to generate a report containing the license codes from the setup table.

Position Group Listing - The Position Group Listing routine is used to generate a report containing the position groups from the setup table.

Retirement System Code Listing - The Retirement System Code Listing is used to generate a report containing the retirement system codes from the setup table.

Tenure Area Type Listing - The Tenure Area Type Listing routine is used to generate a report containing the tenure area type codes from the setup table.

Tenure Status Listing - The Tenure Status Listing routine is used to generate a report containing the tenure status codes from the setup table.

Union Affiliation Listing - The Union Affiliation Listing routine is used to generate a report containing the union affiliations from the setup table.

EEOC Type Listing - The EEOC Type Listing routine is used to generate a report containing the Equal Employment Opportunity Types from the setup table.

GASB 45 Benefit Code Listing - The GASB 45 Benefit Code Listing routine is used to generate a report containing the GASB 45 Benefit Codes from the setup table.

Year End Reports

Attendance Confirmation Letters - The Attendance Confirmation Letters routine prints balances in selected attendance banks for a specified fiscal year in a letter that can be sent to employees. Options are provided to include/exclude the confirmation signature line and unit taken amounts. Additional options are included that allow you to customize letter column labels and to print special notes or instructions.

Contract Letters - The Print Contract Letters option provides the ability to print a salary letter for selected employees. The letters contain the contract, annualized, per diem, hourly, and supplemental earnings from the Appointment Earnings window in Employee Payroll Information that fall within the reporting year selected. This routine provides the ability to print salary letters for one or multiple employees, employee statuses, and/or pay profiles, within a selected fiscal year. Options are provided to include/exclude the Employee Agreement, Period Pay Total and/or Disclaimer, and signature. Additional options included allow customization of the text of the Employee Agreement, Employee Confirmation, Period Pay Disclaimer, and/or Opening Line. Account code, benefit, and attendance details can also be optionally included on the letter.