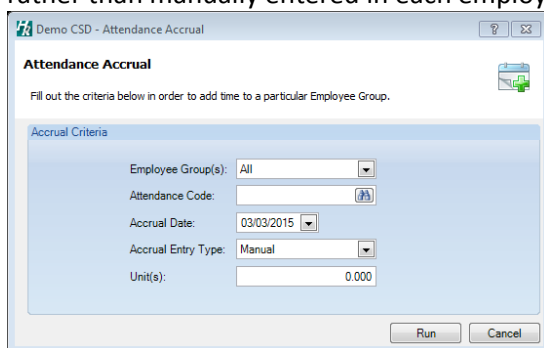# Human Resource Module

Utilities
Path: Human Resources/Utilities

Attendance Accrual

The Attendance Accrual Utility provides the ability to globally accrue time in an attendance bank for any active employee appointment in a selected employee group(s). There are two different ways to run the accrual.

- The *Manual* accrual option can be used at any time and provides the ability to give employees accrued time in any attendance code from the Attendance Codes Setup File.
- The *Attendance Profile Rules* option provides the ability to run accruals every month for those attendance codes flagged as Active for Monthly Accrual in the Attendance Profiles Setup routine. This utility simplifies the accrual entry process in that accrual units are automatically created for employees within an employee grouping(s), rather than manually entered in each employee's record.

- **Performing a Manual Accrual**
  - **Employee Group** - Select the employee group(s) to be included in the accrual.
  - **Attendance Code** - Select the attendance code to which the accrual amount is to be applied.
  - **Accrual Date** - Will be shown in the employee's attendance record. The accrual date defaults to the current system date, but may be changed as needed.
  - **Accrual Type** - Set to Manual.
  - **Accrual Units** - Specify the accrual Units for the attendance code selected.
  - Click **Run** to generate the accruals. Upon completion of the accrual process, a message window states the number of attendance entries added. Click OK.
    - Manual Accrual information can be seen on the Attendance Bank and Detail Attendance windows for employees in the selected employee groups in the Daily Attendance routine. Each globally recorded manual attendance accrual record is flagged with the specified Accrual Date, along with an Earned Accrual attendance type, and a **Manual Attendance Accrual** reason notation, as shown in the illustration that follows. This **Manual Attendance Accrual** Reason signifies that the attendance was recorded through the utility. In addition, nVision automatically adjusts the employee's attendance bank information.
- **Performing a Monthly Accrual Based on Attendance Profile Rules** - This option is used to run accruals every month for those attendance codes that have a Monthly Accrual value entered on the Attendance Rules tab AND the Monthly Auto Accrual for the Attendance Code is flagged as Active on the Automatic Accrual tab in the Attendance Profiles Setup routine.
  - **Employee Group** - Select the employee group(s) to be included in the accrual.
  - **Attendance Code** - Select the attendance code for which the number of monthly accrual units (as defined in Attendance Profiles Setup) is to be applied.
  - **Accrual Date** - Will be shown in the employee's attendance record. The accrual date defaults to the current system date, but may be changed as needed.

o **Accrual Type** - Set to Attendance Profile Rule.
o Click **Run** to generate the accruals. Upon completion of the accrual process, a message window states the number of attendance entries added. Click OK.
  ▪ Attendance Profile Rules accrual information can be seen on the Attendance Bank and Detail Attendance windows for the selected employee groups in the Daily Attendance Entry routine. Each attendance monthly accrual record is flagged with the Accrual Date which was entered on the Utility window, along with an Earned Accrual Attendance Type, and a Monthly Attendance Accrual Earned Reason notation, as shown in the illustration below. This Monthly Earned Accrual Reason signifies that the attendance was recorded through the utility. In addition, nVision automatically adjusts the employee's attendance bank information.

Attendance Transfer

The Attendance Transfer Routine is used to transfer employee attendance bank and attendance detail records from one position appointment to another across all fiscal years or only for selected fiscal years.

- **Employee** - Choose the Employee whose attendance is being transferred.
- **From Appointment** – Select the appointment FROM which you are transferring attendance records. The drop-down arrow only contains those appointments for which attendance records are currently linked.
- **To Appointment** – Select the appointment TO which you are transferring attendance records. The drop-down arrow contains all current, active appointments for the employee.
- **Fiscal Year** - Choose the fiscal year(s) from which attendance records are to be transferred.
- Click **Transfer** to transfer attendance records From and To the selected appointments.

Delete Attendance

The Delete Attendance Utility provides the ability to globally remove earned accrual, prior balance, and taken/donated information that was incorrectly recorded on a specified date for employees in a selected employee group(s). You can specify any attendance code that you wish, including any one of the main attendance banks of Sick, Vacation, Personal, and Comp Time. This utility simplifies the deletion process in that the system removes attendance information for employees within an employee group(s), rather than having to manually delete attendance information in each individual employee record.

- **Employee Group(s)** - Select the employee group(s) that you want to delete attendance for.
- **Attendance Code(s)** - Select the attendance code information which is being deleted.
- **Delete Date** – Specify date that the system will use when searching for attendance events. This is the posting date of the events that you want to delete.
- **Attendance Entry Types to Delete** - Check the types to be deleted. For the employee group(s) selected, any prior balance, earned accrual, units taken, units donated, taken from donation bank, payouts, and/or leave requests in the selected attendance code(s) on the specified date will be deleted.
- Click **Run** to generate the deletion.
    - The system automatically deletes the appropriate attendance detail record(s) and adjusts the employee's attendance bank information. Attendance information can be seen on the Attendance Bank and Detail Attendance windows for the selected employees in the specified groups in the Daily Attendance routine.
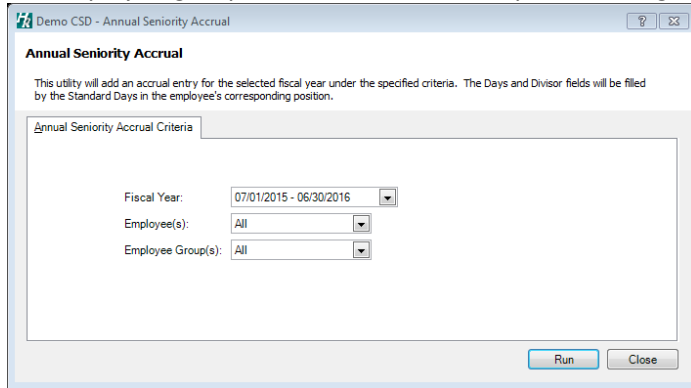
Record Global Donated Day

The Record Global Donated Day Utility provides the ability to globally record attendance units being donated to one of the active bargaining unit attendance banks created through Donation Banks setup. You can specify the donation bank, employee group(s), donated date, and number of units donated for any attendance code in your Attendance Code Setup File where an attendance bank already exists. Use this utility when employees in a bargaining unit and affiliated employee group(s) are donating days to a specific attendance bank pool (such as a Teacher's Sick Bank). This utility simplifies the attendance donation entry process in that donated units are entered for employees within an employee group(s), rather than entered manually in each individual employee's record.

- **Donation Bank** - Choose the Donation Bank into which time is being donated.
- **Employee Group(s)** - Select the employee group(s) for whom you want to record time donated.
- **Donated Date** - Specify date to be shown in the employee's attendance record.
- **Units** - Specify the number of Units donated for the employee group selected.
- **Exceed Available Balance** – Check box if you want nVision to record the donated day even for employees that do not have enough available days in their attendance bank. Leave the box unchecked if you do not want nVision to record a donated unit(s) for those employees who do NOT have enough available time.
- Click **Run** to create the donated records.
    - Donated information can be seen on the Attendance Bank and Detail Attendance windows for the selected employees from the employee groups selected in the Daily Attendance routine. Each global donated record is flagged with the specified Donated Date, along with a Donation Attendance Type, the name of the Donation Bank, and a Global Donated Day Reason notation, as shown in the illustration that follows. This Global Donated Day Reason signifies that the attendance was recorded through the utility. In addition, the system automatically adjusts the appropriate employee's attendance bank information as well as the amount in the bargaining unit attendance bank pool.

Annual Seniority Accrual

The Annual Seniority Accrual Utility provides the ability to accrue seniority for a selected employee, a range of employees, or employees in one, multiple, or all employee groups for a selected fiscal year. This utility automates the accrual entry process by creating an annual accrual for employees within an employee grouping(s), rather than manually entering seniority accruals in each individual employee record. This routine will create an Accrual Accrue record for selected employees in all areas (Civil Service and/or Tenure) where they have a Starting Date record that has not ended prior to the accrual period. *Note: If an end date exists on the Seniority Starting Date record for an employee that is within the accrual period, the routine will only calculate the number of days thru the end date when a calendar exists for the employee group, otherwise, an error report will be generated and no time will accrue for the employee(s).*

- **Fiscal Year** - Choose the appropriate open fiscal year for which you are processing the seniority accrual.
- **Employee(s)** - Select the employee(s) to be included in the accrual.
- **Employee Group(s)** - Select the employee group(s) to be included in the accrual
- Click **Run** to generate the accruals.
  - Accrual information can be seen on the Seniority window for the selected employee types or employees in the Employee Maintenance routine. Each globally recorded seniority accrual record is flagged with an Annual Accrue entry code, number of accrued days, divisor, and years. The number of Years is automatically calculated by dividing the number of Days being accrued by the Divisor amount.

How the Seniority Divisor is Determined When the Seniority Unit is in DAYS
- *If the Seniority Unit for the EMPLOYEE GROUP is set to DAYS:* The Seniority Calc Method and Days Worked Method fields in Employee Groups Setup also determine how the divisor is going to be calculated.
- *If the Days Worked Method is set to Swaim:* The Divisor always defaults to the SWAIM number of calculated work days.
- *If the Seniority Calc Method is set to Calendar and the Days Worked Method is set to Actual:* The divisor defaults to the number of Paid Work Days associated with the fiscal year calendar (provided that the ACCRUAL date range specified is within the date range of the calendar linked to the bargaining unit). If there is no calendar linked to the bargaining unit or the appointment is not position-controlled or the calendar linked is not in sync with the ACCRUAL date range specified, the Divisor defaults to the number of standard days on the appointment.
- *If the Seniority Calc Method flag is set to Standard Days and the Days Worked Method is set to Actual:* The divisor defaults to the number of standard days on the appointment.

How the Seniority Divisor is Determined When the Seniority Unit is in HOURS
- *If the Seniority Unit for the EMPLOYEE GROUP is set to HOURS:* The Seniority Calc Method and Days Worked Method fields in Employee Groups Setup also determine how the divisor is going to be calculated.
- *If the Days Worked Method is set to Swaim:* The Divisor always defaults to the SWAIM number of calculated work days times the Actual Hours/Day from the appointment.
- *If the Seniority Calc Method is set to Calendar and the Days Worked Method is set to Actual:* The divisor defaults to the number of Paid Work Days associated with the fiscal year calendar (provided that the ACCRUAL date range specified is within the date range of the calendar linked to the bargaining unit) times the Actual Hours/Day from the appointment. If there is no calendar linked to the bargaining unit or the appointment is not

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position-controlled or the calendar linked is not in sync with the ACCRUAL date range specified, the Divisor defaults to the number of standard days on the appointment times the Actual Hours/Day from the appointment.

- *If the Seniority Calc Method is set to Standard Days and the Days Worked Method is set to Actual:* The divisor defaults to the number of standard days on the appointment times the Actual Hours/Day from the appointment.

Global Benefit Rate Change

After making changes to rates in multiple different benefit records in Benefits Setup, use the Global Benefit Rate Change utility to globally apply the changed rates from all or selected benefits to the appropriate employee records.

For more information on using the Global Benefit Rate Change Utility, refer to the Human Resource Benefits Documentation

Staff Evaluation

The purpose of the Staff Evaluation Utility is to improve student achievement through improved teacher performance. In compliance with Annual Professional Performance Review (APPR) requirements from the State Education Department (SED), nVision Human Resources allows the Staff Evaluation Rating to be entered and stored each fiscal year for the instructional employee.

The Snapshot Extract and Report features provide a collection of staff information that includes the original hire date, exit date (if the rehire date is blank), and tenure date. The Staff Snapshot file must be sent to the New York State Education Department (NYSED) before any evaluation rating information is sent.

Instructional employee ratings can be manually entered for each individual employee via the Staff Evaluation Rating Detail window or imported from a. prn file. Each employee will have four rating records in their Staff Evaluation File – for State, Local, Other, and Total.

After the employee ratings are entered, the Ratings Report can be printed so that all entered information can be reviewed for accuracy. The Ratings Extract can then be used to create a ratings file to be sent to the New York State Education Department (NYSED).

For more information on using the Staff Evaluation Utility, refer to the Staff Evaluation Document