Human Resource Management System

HRMS LEA Release Notes

Release notes appear in reverse chronological order.
Note: Items highlighted in red require some attention on the part of the LEAs.

Use this link for Support and this one for the HRMS Help site and documentation

V6.5.3.9 (April 2020)

Background information: This release an update to the New Hire screen for those districts integrated with PeopleAdmin (formerly TeacherMatch) (see 6.5.3 release notes for more details).

Enhancements

- When a user is reviewing records in the New Hires screen, there is now a button labeled "Delete Record". This action will remove the record from the New Hires holding table only. If the new hire is a current or former employee, it does not affect employee data that already exists. Updated instructions on New Hires.

V6.5.3.8 (August 2019)

Background information: This release includes tools and guidance to track Criminal Background checks for staff involved with Pre-K students and updates to facilitate multi-year contract terms.

Enhancements

- New legislation requires that any staff who are in contact with Pre-K students have a background check. Some changes have been made to HRMS to assist with monitoring. Be sure to read the document in the second bullet for a process by which the LEA can monitor using the tools in HRMS.
  - In version 6.3.1, a new "Pre-K Teacher" field was added to the 'Create' and 'Edit Position' forms and was required for Licensed positions only. (This new field was needed for the upload to NCEES.) The field label has been changed to "Pre-K Indicator" and now appears on all position types.
  - This document explains a best practice for LEAs to use in order to monitor the Pre-K criminal history check requirement.
- The new licensure form, RL- Residency License Verification/Certification of Supervision, has been added as a PDF only version. This form can be found with the other forms under Licensure Forms Management.
- A new licensure program status code, R-Residency, has been added and will be displayed with an employee's license information.
- As a result of the ability for LEAs to create teacher contracts with terms longer than 1 year, we have modified the Mass Updates-Build Contracts process and created a new web report.

- Mass Updates-Build Contracts. For Step #2 and Step #3, columns for Ending School Year and Contract Term, have been added.
- Web Report 000141-Teachers with Active Contracts. This new report allows you to see active teacher contracts in your LEA. The user can make selections for Ending School Year and Contract Term, to narrow the results. The report is viewable on the web as well as exportable to Excel.

Miscellaneous Bug Fixes

- N/A

V6.5.3.7 (August 2018)

Background information: This release includes connections with True North Logic (Performance Matters) to import continuing education units (CEUs) data.

Enhancements

- The system has been updated to show CEUs imported from True North Logic (Performance Matters) professional development system. The data is made available to LEA HR staff to review and determine which, if any, CEUs record are imported into the LEA HR system. This is accessed on the Home screen under the Continuing Education section. Check your email and the HRMS Help site for training opportunities that will explain this new feature.

Miscellaneous Bug Fixes

- N/A

V6.5.3.6 (June 2018)

Background information: This main purpose for this release is to implement new security requirements. A separate instructional document is being provided to the LEAs and will be accessible through the HRMS Communications site.

Enhancements

This upgrade includes the following changes:

- All users must reset their passwords.
- All users must to modify their passwords every 90 days.
- All passwords must have one uppercase letter, one lower case letter and one special character.
- New registered users must create their own passwords
- All passwords are stored as hashed, so they are not viewable as plan text.

Miscellaneous Bug Fixes

- CEU Template Management – when requesting results by Source, the listing returns results sorted by the date the template was built. Clicking the Description column header failed to sort the data. This has been resolved.

V6.5.3.5 (February 2018)

Background information: This release includes updates to contract variables as well as some minor fixes.

Enhancements

- The Term of Contracts field has been updated to offer 1, 2 and 4 years contracts. Multi-year contracts are allowable starting with the 2018-19 school year.
- Beginning School Year field for contracts has been updated to include up to year 2030.
- The text label for the payroll system 'ISIS Web' has been updated to 'LINQ/ISIS Web', no action needed this is only to avoid confusion for users.

Miscellaneous Bug Fixes

- In the LEA Configuration menu, the "Coaching, Hobbies" link which was obsolete, has been removed.
- In the Position Management Console, we removed the button "Show Current Web Postings", which is now obsolete.
- With the sunsetting of the HRMS applicant system, the following reports were removed from the library: 000001 - Applicants with College Information, 000004 - External Applicants Who Declined a Position, 000005 - Internal Applicants Who Declined a Position, 000006 - Inactive Applications Recently Modified, and 000012 - Applicants Who Applied for Positions Posted on the Web.

V6.5.3.4 (September 2017)

Background information: This release includes some improvements to the Mass Update for Contracts as well as some other minor fixes and improvements.

Enhancements

- Mass Build Contracts has been updated with the following:
  - At the final step of the process, the user can see the complete selection criteria and the contract data used.
  - Added the ability to create contracts for staff who have no existing contract.
  - Inactivated 'Career' from the choices of contracts.
  - In Step 2, we added the position months for an employee to the results shown.
- When reviewing the License Areas for an employee, there is text that appears in a hover when accessing the '?' in the Prgm column. The text has been updated to reflect the change in title from Standard Professional I to Initial and Standard Professional II to Continuing. SPI is now Init. and SPII is Cont.
- When the new hire data comes from PeopleAdmin to HRMS, the city is appearing in UPPERCASE. We are converting this text to Title Case.

Miscellaneous Bug Fixes

- We updated various pages in the system that had old design styles to match the rest of the system. Pages updated are: LEA Licensure Data Page, CEU Confirmation page.
- When accessing the Renewal List, if there are a large number of results, the system would hang and fail to return results. This bug has been resolved.

V6.5.3.3 (August 2017)

Background information: This release includes an update to the New Hire interface and an update to the archive process.

Enhancements

- After hiring a candidate in NC School Jobs, if there is a position number, it transfers to HRMS. After selecting the employee from the New Hire screen, the next screen offers the ability to Transfer/Re-employ/Add Assignment. This screen will now present the candidate's address information if it differs from the data in HRMS and allow the user to update HRMS with this data, if they choose.
- The archive assignment process previously stored the site number, but not the name. If this name changes over time, when viewing the archived data, the user saw the current site name. The archive process will now save the site name, as it exists at the time of the archiving. This field is exposed in the Query Builder as well.
- On the Assign Continuing Education Class form, when viewing the Class Roster, a user can now click a checkbox to Select/Deselect all staff.
- On the CEU Mass Update to a Single Course, a user can now click a checkbox to Select/Deselect all staff listed on the roster for the specified course.
- At the bottom of the Employee Demographics screen, we have added buttons for HOME, Employee and Switch Employee to assist navigation.

Miscellaneous Bug Fixes

- **Correction**: In version 6.5.3.2, we mistakenly used the label "Digital Literacy" which should have been "Digital Learning". We corrected all instances of text that are in the release notes for 6.5.3.2.
- Bug fix: In the 'Mass Update Single Course,' when a user clicked on 'Update Selected Attendees', it was opening a blank page that was supposed to be a confirmation page and instead ended the update processing. We removed the conformation page and updates display on the current page.

V6.5.3.2 (June 2017)

Background information: The main purpose of this release is to add the Digital Learning CEU type to data collection and reports. Per G.S. 115C-296 (b)(1)c.iii the following new requirements are in place.

Credits required for licenses expiring on: June 30, 2017 & June 30, 2018	Credits required for licenses expiring on or after: June 30, 2019
Grades K-8: •3 Subject Area •3 Literacy •2 General	**Grades K-8:** •3 Subject Area •3 Literacy **•2 Digital Learning Competencies**
Grades 9-12: •3 Subject Area •5 General	**Grades 9-12:** •3 Subject Area **•2 Digital Learning Competencies** •3 General
Administrators: •3 Executive's Role •5 General	**Administrators:** •3 Executive's Role **•2 Digital Learning Competencies** •3 General

Enhancements

- For the following pages, we added a column for Digital Learning after the Technology Credits column. The pages are Continuing Education Employee History, Renewals by Class Code/SSN/Description, CEU Mass Update, Assign Class Confirmation.
- For the following pages, we added the ability to assign Digital Learning credits. The pages are CEU Template Management, CEU Template.
- **Web Report - 000003 Applicant Email List**. The application type “Substitute” is now an option in the list query choices.
- **Web Report - 000003a Applicant Email List with Indicators**. The application type “Substitute” is now an option in the list query choices.
- **Web Report – 000007 CEU Totals**. Added the column “Digital Lrng” after the “Tech” Column.
- **Web Report – 000010 CEU Renewal List By Course.** Added the column “Digital Lrng” after the “Tech” Column.
- **Web Report – 000011 Last Few CEU Course IDs Used**. Updated to match other existing CEU reports. Changed the following column headings: “NCLB Cred” to “Other Cred”, “Read Cred” to “Lit Cred”, “Prin Cred” to “Sch Adm Cred”, “Acad Cred” to “Cont Cred”. Added a new column, “Dig Lrng Cred” for Digital Learning.
- In v6.5.1 the number of local use fields on the Employee Demographics screen increased from 20 to 30. These fields are now accessible through the Query Builder as well.
- The user now sees the Position Choice listed below the Position Title when viewing/editing the Position screen.

V6.5.3.1 (September 2016)

Background information: The main purpose of this release is address minor bug fixes.

Enhancements

- **Web Report - 000003a Applicant Email List with Indicators**. The purpose of this report is to provide a listing of applicant's contact information and indicators (Subpar, Do Not Hire, Revoked License, Dismissed, Current Employment Status.) The user may select a date range and application type. The results sort by application modification date and then name. This report is similar to 000003 with the addition of indicator fields. The listing may prove beneficial for districts that have switched to the new NC School Jobs powered by PeopleAdmin when seeking applicants to contact from School Jobs as part of the districts transition process.
- **LEA Configuration>Leave of Absence.** The updated column header includes the number of characters for the description can be up to 30 characters.
- **Assignment Start Date = End Date.** Previously, if a user had an employee assignment that started and ended on the same date, they had to adjust the end date to be the next day. Now the system allows a user to set the Start and End Dates for an assignment as the same date.
- **Employee>Staffing>New Hires sortable columns.** For districts integrated with the external Applicant Tracking System (ATS), there is a table of hired candidates brought over from the ATS. All columns of this table are now sortable.
- **Pick Employee - UID added.** On the Pick Employee screen, you can now search on UID (last few digits) and the results include the UID as well.
- **Vacancy Permit – *Replacement For* field size increased.** On the vacancy permit, the field form *Replacement For* increased from 50 to 75 characters.

Miscellaneous Bug Fixes

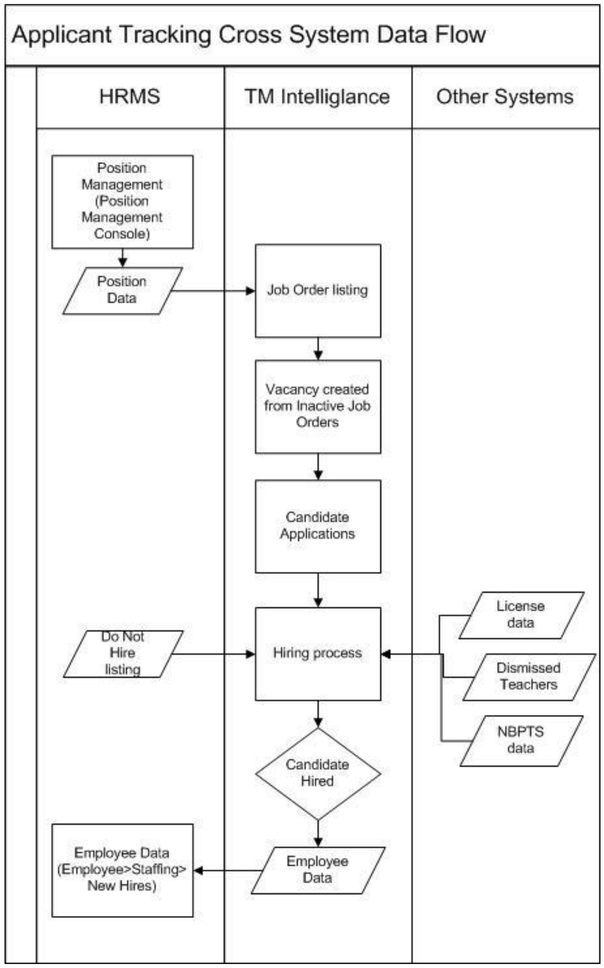
- Bug fix: When a separation occurs, the system prompts the user to create a Vacancy Permit. If the system integrates with the Applicant Tracking System (ATS), text related to the vacancy permit will no longer appear.
- Bug fix: On the Employee Page there was a menu item labeled “Old Licensure Forms” which has been removed.
- Bug fix: The confirmation message that appears after a separation is processed contained had a misspelling.
- Bug fix: For LEAs integrated with the new Applicant Tracking System, after they hired an employee in HRMS, those employees may reappear on the New Hire screen. The system now deletes records older than 7 days that are marked as completed.
- Bug fix: When the Pick Employee screen returns no results, the ASGN column displayed the word *view*. The table will no longer appear unless there are results.
- Bug fix: The spelling in the employment status code “64 RES HEALTH Resigned - Because Of Health/Disabilty” corrected to “Health/**Disability”**.

V6.5.3 (March 2016)

Background information: The main purpose of this release is to integrate the new NC School Jobs powered by TeacherMatch with HRMS. At the end of the integration information is a section on some bugs that were fixed as well.

NC School Jobs powered by TeacherMatch integration with HRMS

This release provides functionality to integrate HRMS with the new applicant tracking system. In order to provide more context for the system integrations, below is a flow diagram showing the integration between HRMS – TeacherMatch and other contributing systems.



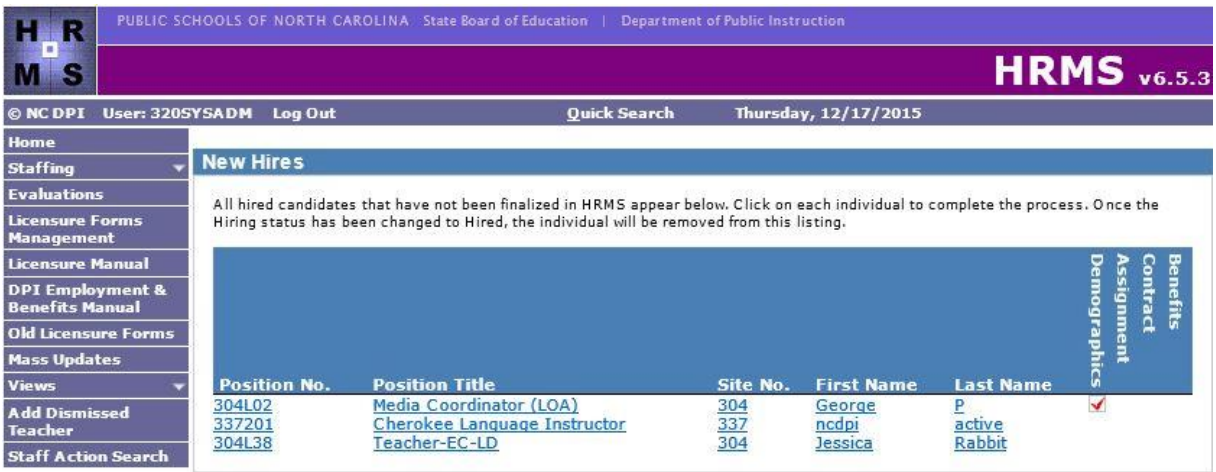
Initially, you will see no difference in your system other than the version number. Once your LEA is ready to switch over to NC School Jobs powered by TeacherMatch, the HRMS team with change your setting (LEA Configuration/NC School Jobs Settings) to *integrated*. When your setting is changed, the previous menu items and functionality associated with the current School Jobs system will disappear and links needed for the new integration will appear. The table below shows which links appear under which conditions.

Menu Item	**Integrated with NC School Jobs**	**Current HRMS**
Employee>Staffing >New Hires	X	
Employee>Staffing >Search Historic Applicants	X	
Employee>Staffing >New Hire Nominees		X
Home Screen>Apply Online		X
Home Screen>Job Postings		X
Home Screen>Applicants		X
Home Screen>Vacancies		X
LEA Configuration>Applicant Local Questions		X
LEA Configuration>Convert Application Types		X
LEA Configuration>NC School Jobs Settings		X

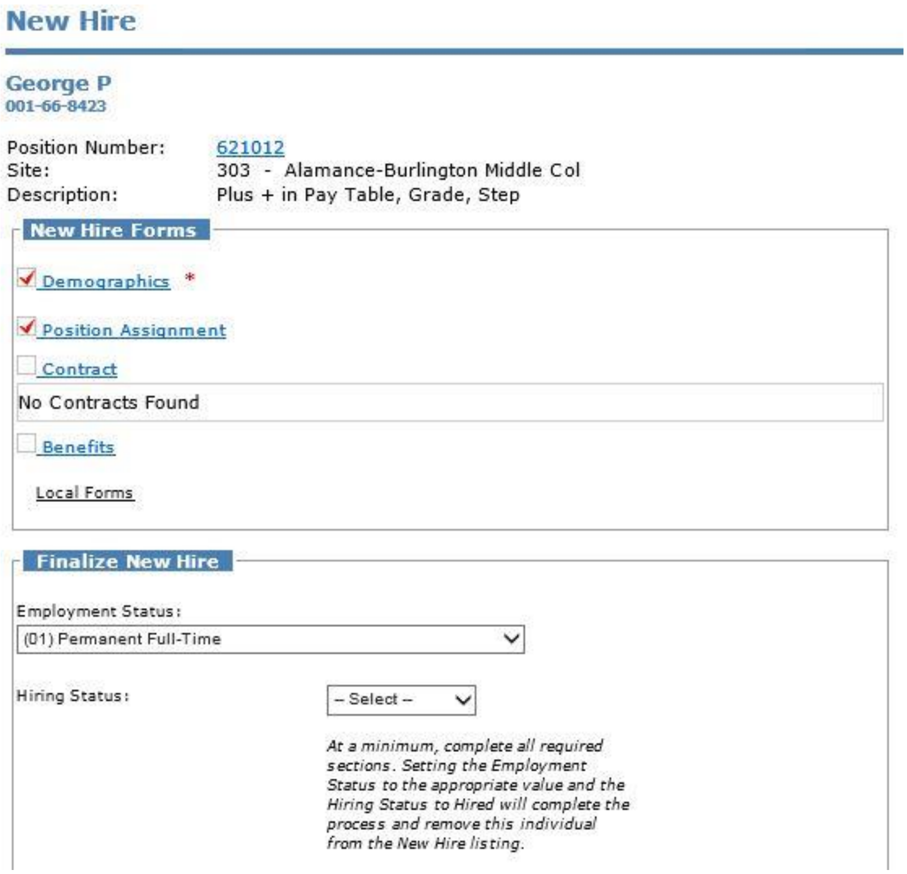
Menu Item	Integrated with NC School Jobs	Current HRMS
LEA Configuration>Reference Questions		X
LEA Configuration>Reference Question Sets		X

Additionally, there are buttons that either will disappear or become inactive, such as the 'Post to Web', 'VP Status', 'On Web' and 'Post Int' within the Position Management Console.

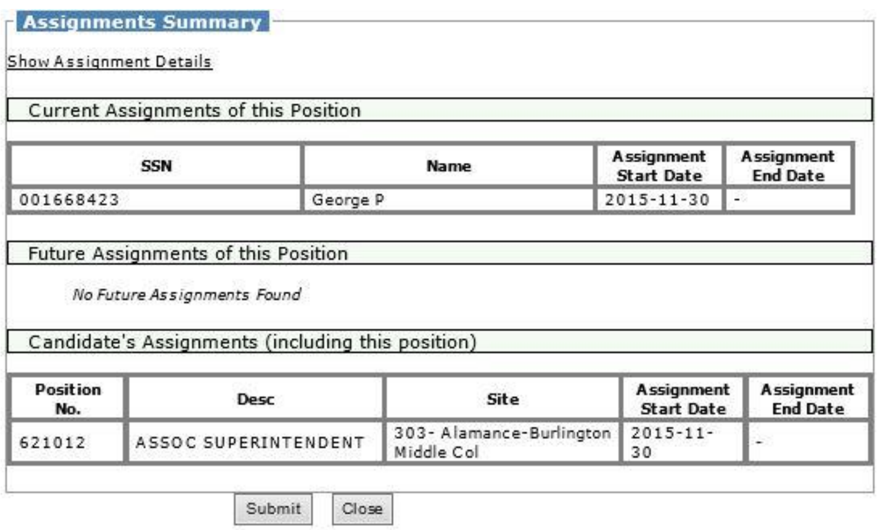
Employee Page> Staffing> New Hires – this functionality mirrors the functionality of the current New Hire Nominees. When a user clicks this link, they will see a listing of candidates Hired in NC School Jobs. The listing will show the Position No., Position Title, Site No., First Name, Last Name and the status of completion for the Demographics, Assignment, Contract and Benefits.



When selecting a new hire, the individual's New Hire screen appears. At a minimum, a user MUST complete the Demographics section before finalizing the new hire. A user can complete any or none of the additional sections (Position Assignment, Contract, Benefits, and Local Forms) as needed. As sections are completed, a checkmark will appear on the New Hires screen next to their name and on the individual's New Hire screen.

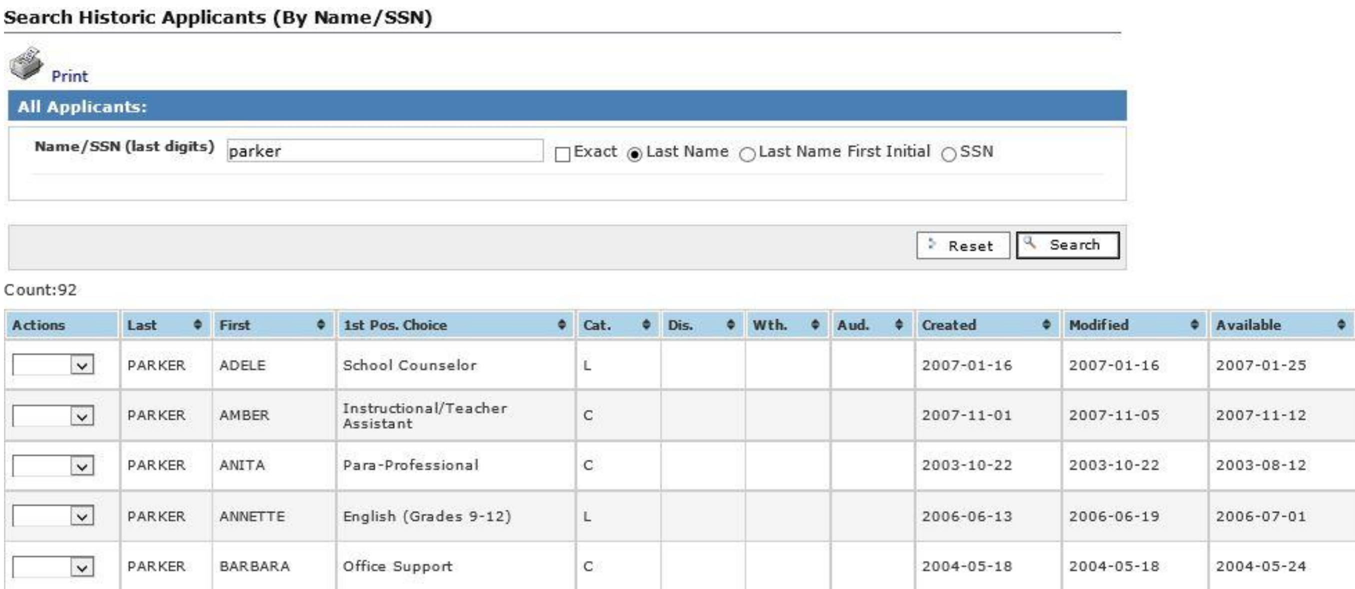


If you add an assignment, the details will appear at the bottom of the screen in the Assignments Summary section.



Note: You **MUST** complete the demographics section to add the candidate to your employee table. Once the demographics are complete, a user can set the Employment Status and change the Hiring Status to *Hired* to complete the process and remove the new hire from the New Hire listing.

Employee Page> Staffing> Search Historic Applicants – this functionality mirrors the functionality of the current **Applicants> Search Applicants**. When a user clicks this link, they can enter the SSN or the Last Name to find an application submitted through the School Jobs website. This functionality is in place for LEAs to be able to access ALL applications they have ever received, in case they need to print them, do audits, etc. A user should be specific when performing a search to avoid receiving large numbers of results.


Search Historic Applicants (By Name/SSN)

Print

All Applicants:

Name/SSN (last digits) parker ☐ Exact ◉ Last Name ○ Last Name First Initial ○ SSN

Reset Search

Count:92

Actions	Last	First	1st Pos. Choice	Cat.	Dis.	Wth.	Aud.	Created	Modified	Available
	PARKER	ADELE	School Counselor	L				2007-01-16	2007-01-16	2007-01-25
	PARKER	AMBER	Instructional/Teacher Assistant	C				2007-11-01	2007-11-05	2007-11-12
	PARKER	ANITA	Para-Professional	C				2003-10-22	2003-10-22	2003-08-12
	PARKER	ANNETTE	English (Grades 9-12)	L				2006-06-13	2006-06-19	2006-07-01
	PARKER	BARBARA	Office Support	C				2004-05-18	2004-05-18	2004-05-24

The only action available is to View App, which will present the application submitted and allow the district to print it as necessary.

Miscellaneous Bug Fixes

- **Bug fix**: When adding an employee using "Without Vacancy Permit", and a match is found on SSN in the HRMSAPP.Candidate table, the HRMS Demographic screen is populated with data from the HRMSAPP.Candidate for that SSN. For 3 fields in the HRMSAPP.Candidate table (Emergency Contact Name 1, Emergency Contact Relationship 1, Emergency Contact Home Phone 1), if data exists on the application the fields show as blank on the screen. When a user entered data, it was not saved; instead, whatever existed in the candidate data (even blanks) was saved. The system now displays any pre-existing data on the screen and any edits are saved.
- **Bug fix:** This issue is with ISIS Web only. When the salary schedule data came from ISIS Web there were instances of duplicates. HRMS considers the Schedule, Grade and Step to be unique, while ISIS Web also includes the Description. When loading the data into HRMS if a duplicate was encountered the process failed and no further entries were loaded into the salary schedule. HRMS now checks for the date timestamp of the record and will load the latest record if more than one is found, where the Salary Schedule-Grade-Step are unique.

V6.5.2.4 (November 2015)

Miscellaneous Bug Fix

- There was an issue reported that when a user searched CEU Lookup History using the Payroll Employee ID, the credits of certain columns was reported in the wrong column (Content and Technology, Literacy and School Admin).

V6.5.2.3 (October 2015)

The Continuing Education Employee History screen updated to remove the State Required and Remaining rows in the table.

V6.5.2.2 (September 2015)

Background information: The purpose of this release was to provide some minor bug fixes and enhancements.

Miscellaneous Bug Fixes & Enhancements

- We added web report "000139 Position Choice and Position Title Review". This report displays the connection between Position Choices and Position Titles. Position Choices are set at the State and are high-level titles (such as "Elementary Teacher") and the Position Title (such as "Third Grade Teacher") is specific to a position or set of positions. The Position Choice displays on the NC SchoolJobs site as the Job Title, and the Position Title initially populates the Job Description. Use this report to validate that the Position Title relates to the Position Choice chosen and modify those that are mismatched. These settings are managed at Setup>LEA Configuration>Position Titles.
- For the *Evaluation Category* and the *Position Reporting Information SS-200* classification assigned to a Position, there is a title change. The term "Guidance Counselor", which is no longer used, changed to "School Counselor" to be consistent with agency reporting and guidelines.

Note: If you have any Position Titles that are Guidance Counselor, you will want to consider changing them to School Counselor.

- The size of the Position Choice Description field increased from 40 to 65 characters. This will help as we update the values based on the guidance of the Applicant Tracking Advisory Board. The description changes are on the HRMS Communications site. (http://hrmscomm.wikispaces.com/file/view/Position+Groups+and+Choices+updates.pdf/556817239/Position%20Groups%20and%20Choices%20updates.pdf)
  Note: If you currently use this field in any external report, note the field size has increased.
- The CEU **General Credits** column heading changed to **Other Credits**. This change is on all web reports and screens displayed CEU data.
- **Bug fix**: When an LEA upgrades to Domino 9, the Payroll Position # Reconciliation Tool fails. This was due to a change in Domino 9 that did not allow a specific variable name being used. The team has recoded to resolve this issue.

V6.5.2.1 (August 2015)

Miscellaneous Bug Fixes & Enhancements

Issue#1

- **Issue**: If a position was NOT categorized on the SS200 report as Elementary Teacher, when the Content/Literacy credit split was invoked, credits were being applied to BOTH Content Credits and Literacy Credits. Only Elementary Teachers, who are NOT Pre-K are required to have the Literacy credits, all others should be granted Content Credits only.
- **Resolution**: When a position is NOT categorized on the SS200 report as Elementary Teacher, the split will now put all awarded credits into Content Credits. To see which classes this issue affected, run the Web Report 000023 - CEU Literacy Content Credit Errors Report.

Issue #2

- **Issue**: If a position was categorized on the SS200 report as Elementary Teacher, and the Pre-K Teacher indicator was YES, the CEU Employee History view screen showed Literacy credits as required. No Literacy credits are required for Pre-K teachers.
- **Resolution**: If a position has a Pre-K Teacher indicator set to YES, then no Literacy credits are required and the split will not grant them Literacy credits. Additionally, the CEU Employee History screen will not show a State Required amount for Literacy Credits.

Additionally, the Web Report **000138 CEU Literacy Credit Review** has been updated to exclude Pre-K Teachers as well.

V6.5.2 (July 2015)

Background information: The main purpose of this release was to provide the new distribution of CEUs to meet Licensure renewal changes that take effect with licenses expiring 06/30/2016 or later.

CEU Changes for Licensure Renewal

Based on legislation, License renewals require the following CEU amounts:

- K-8 teachers are required to have 8 total CEUs – 3 must be Content credits and 3 must be Literacy credits
- All other educators are required to have 8 total CEUs – 3 must be Content credits

HRMS will use the Position Reporting Information value of 'Elementary Classroom Teacher', selected for the SS200 report, to determine those requiring the 3 Literacy Credits in addition to the 3 Content Credits. When you enter CEU information, it will look to see how current positions are being reported for the SS200, and if ANY positions for an employee are 'Elementary Classroom Teacher' it will split based on the 3 Literacy and 3 Content Credit distribution.

In addition to the logic change, the CEU view will change as well. We made the following changes to the view:

- **Academic Credits** heading changed to **Content Credits**
- **NCLB Credits** heading changed to **General Credits**
- We added a row to show the **State Required** renewal credit amounts.
- We added a row to show the difference between the **State Required** credit amounts and the **Current** credit amounts. When there is a deficiency, it will appear shaded in red.

Headings on the CEU Course Template have changed. References to **Academic Credits** have changed to **Content Credits** and **NCLB Credits** have changed to **General Credits**.

Note: Items highlighted in red require some attention on the part of the LEAs.

- If your LEA does not designate your positions for the SS200 report, the automatic splitting of manually added CEUs will not work. Teachers that require the 3 Literacy credits will not be shown as needing those credits for renewal. You can still distribute credits manually.
- We added a new web report, **000138 Literacy Credit Review**, to assist you in finding staff that potentially do not have the proper CEU credits for renewals. This report lists staff designated as "Elementary Teacher" on the SS200 report AND who have > 3 Content and < 3 Literacy credits.

Miscellaneous Bug Fixes & Enhancements

- Automated emails – the following system generated emails were modified. The Staff Demographics update email now includes a listing of all fields that changed for a specified employee. We removed an email notification that an SSN changed.
- We updated the content displayed for the ASGN column from the Employee Picker results. The results of the Employee Picker includes a column entitled ASGN that presented content as a '?' and it was unclear that it was a link to the employee's assignment information. The column now presents the word 'view' that is a link to a pop-up displaying the employee's assignments.
- We removed obsolete reports from the Web Reports listing, as shown below.
  - 000009 - Photo Directory By Site
  - 000015 - Teachers Moved to Non-Teaching
  - 000024 - Academic Credits Entered Before License Category
  - 000026 - Old Leave of Absence / Disability
  - 000030 - McRel Populate Report
  - 000128 - Old Suspension Records
  - 000129 - Separation and Employee Termination Date Error
  - 800003 - HRMS Positions with Multiple Employees Assigned

Be sure to check the HRMS Communications website (http://hrmscomm.wikispaces.com/) for updates on specific screens, reports etc.

V6.5.1 (February 2015)

Background information: The purpose of this release was to provide some minor bug fixes and enhancements.

Miscellaneous Bug Fixes & Enhancements

- When a user entered a new hire and the New Hire Date and the Last Hire Date were the same, the system would not allow a user to return and edit the New Hire Date. The system will now allow a user to edit the New Hire Date.
- When a user performed a transfer assignment on a staff member and the Remove Date for the previous Primary assignment and the New Date for the new primary assignment were the same, it would allow this to happen. The system will now display an error message for the user, "There is already another primary assignment for this employee active on MM/DD/YYYY, so you may not designate this assignment as primary until you change the existing primary assignment to be either secondary or to have an assignment end date that won't overlap with this assignment."
- When a staff member was on a Leave of Absence and the user drops the assignment for the staff member and the date is in the past, the employee status was set to 00. The status will now remain as it was.
- Switch Employee navigation was added to the Staff Action Console. When a user is in the Staff Action Console they can now access the navigation link **Switch Employee** to navigate to another employee.
- When hiring a new employee with a future assignment through the Vacancy Permit Process, their employment status is set to 'None'; however, when the user would update benefits or finalize the

employee, the system had required the employment status to be 'Active'. Now for future assignments the user no longer needs to change the status, it can remain as 'None'.

- When performing an Employee Search or a Quick Search from the Home Page, the Employee Display now shows a message in red '**Not Eligible for Rehire**' when the employee is in on the Local Do Not Hire list.
- The following Licensure Forms were added or updated: Form CC (Credit Card), Form ME (Military Experience)
- The number of local use fields on the Employee Demographics screen increased from 20 to 30.

V6.5 (October 2014)

Background information: Under NC's G.S. 115C-320 (Public Records Law), the public has the right to request certain personnel information about school system employees, including name, current position, date and amount of each increase or decrease in salary, and date and type of each promotion, demotion, transfer, suspension, separation, or other change in position classification. See http://www.ncga.state.nc.us/EnactedLegislation/Statutes/HTML/BySection/Chapter_115C/GS_115C-320.html for specifics of the public records legislation.

The HRMS LEA module, with the release of 6.5, has been adjusted to include the remaining new data fields needed for tracking documentation regarding the reason for Adding an Assignment. The designation of New Hire, Re-employment, or Transfer will be indicated as part of the Staff Action Form and this information will be retained as history on each employee's assignment(s). This data is needed in order to provide public records information mandated by G.S. 115C-320.

Additional data fields have been added to the Edit Assignment Form with validation on these new fields to ensure the data entry does not create a conflict with other data already entered for that employee or position. There have also been some adjustments in the Staff Action Archive Agent that runs nightly to include the New Hire and Assignment Actions that were discussed earlier. Finally, several miscellaneous enhancements and bug fixes are included in release 6.5 and are detailed on the last page.

Changes to 'Add Assignment' Form

- The form has been modified capture the 'Reason the assignment is being added.'
  - Possible options are: New Hire, Re-employment, Transfer, and 'New Assignment for Current Employee.'
  - If the user navigates to the 'Add Assignment' form, they must select a Reason on the form where the new Position Number is entered.
  - If the user comes from the 'Transfer' or 'New Hire' process, Reason will default based on the navigation path followed.
- The following fields will be editable on the 'Add Assignment' form, based on the Reason selected:
  - *New Hire:*
    - Original Hire Date
  - *Re-employment:*
    - Last Hire Date
    - Comments about Re-employment (optional)
  - *Transfer:*

    - Voluntary or Involuntary (Administrative) Transfer?
    - Is this for Board Action or Board Information? (if Post on Board Report = 'Yes')
- One of the following staff action records will be created based on the Reason selected:
  - New Hire
  - Re-employment
  - Assignment Action / Transfer
  - Assignment Action / New Assignment for Current Employee

  The staff action Effective Date will be set to the assignment Start Date, except for Transfers, when it is set to the End Date of the old assignment.
- Other minor changes to the 'Add Assignment' Form made in this release include:
  - The following records are no longer being written to the HRMSLEA.STAFF_ACTION table: 'NEW', 'AEM', and 'XFR'.
  - Board Report Date has been changed from Month & Year to MM/DD/YYYY format.
  - An error displays if Assignment Start Date is less than employee's Rehire Eligibility Date.

Changes to 'Create Re-employment' Form

- The question, 'Will Employee Have an HRMS Assignment?' has been removed from the 'Create Re-employment' form. This form should now be used only for employees who will not be placed in an HRMS assignment. For employees who will have an assignment, users should select 'Re-employment' as the reason for adding the assignment.

Changes to 'New Hire with Vacancy Permit' (New Hire Nominee) Process

- The following changes were made to the 'New Hire Summary' form:
  - 'Board Date' was removed. The system will capture Board Date on the 'Add Assignment' form.
  - The 'Terminate New Hire Process' option was removed. Users should now create a Separation instead.
- The 'New Hire Current/Former Employee' form includes the following buttons: 'Re-employment', 'New Assignment for Current Employee,' and 'Transfer.' Clicking one of these buttons now opens the 'Add Assignment' form with the selected option pre-populated as the reason for adding the assignment.

Changes to 'New Hire without Vacancy Permit' Process

- A 'Hire Information' section has been added to the 'Hire New Employee (Demographics)' form.
  - The section includes the question, 'Will Employee Have an HRMS Assignment?'
  - If the user answers 'No,' the following additional fields display:
    - Hire Type – New Hire or Re-employment
    - Original Hire Date
    - Last Hire Date – If Hire Type = Re-employment; must be greater than or equal to Original Hire Date
    - Employment Status
    - Post on Board Report?
    - Board Report Date
  - If the user answers 'Yes,' these fields will be captured on the 'Add Assignment' form instead.
  - The data is used to write either a 'New Hire' or 'Re-employment' staff action record.
- If an existing SSN is entered on the initial 'New Hire without Vacancy Permit' form, a form titled 'New Hire without VP (current/former employee)' form will now display.

- From here, the user can navigate to either the 'Add Assignment' form or the 'Create Re-employment' form (if the employee will not have an assignment).

New 'New Hire Details' and 'Edit New Hire' Forms

- A 'New Hire Details' form is now available to Systems Administrators, HR Staff Action Officers, Staff Action Clerks, and Employee Hire roles. The form can be accessed from the Staff Action Console or Staff Action Search form.
- An 'Edit New Hire' form is available to the same user roles by selecting 'Edit New Hire' from the 'New Hire Details' form. The following fields can be updated:
  - Hire Effective Date
  - Employment Status Upon Hire
  - Comments
- When Hire Effective Date is modified:
  - Original Hire Date will be set to the new Hire Effective Date.
  - Assignment Start Dates that match the original Hire Effective Date will be set to the new Hire Effective Date.
  - If Hire Effective Date is in the past, it cannot be changed to a future date. You must wait until the correct Hire Date has passed to make the change.
- 'New Hire' records cannot be removed/cancelled. A Separation must be entered instead.

New 'Correct Employee Dates' and 'Employee Date Change Details' Forms

- The new 'Correct Employee Dates' form replaces the 'Last Hire Date', 'Original Hire Date', and 'Longevity' forms.
- Systems Administrators, HR Staff Action Officers, Staff Action Clerks, and Employee Hire roles can access this form from the 'Other' menu on the 'Employee Demographics' form or from the drop-down menu on the Staff Action Console.
- Fields on the 'Correct Employee Dates' form:
  - Original Hire Date – If the employee has a New Hire record, a link to edit the New Hire record displays. Otherwise, the field is editable and required.
  - Last Hire Date – If the employee has a matching Re-employment record, a link to edit the Re-employment record displays. Otherwise, the field is editable and required.
  - Longevity Date (optional) – Must be 1st of month
  - Reason for Longevity Change – Required if Longevity Date was updated
  - Termination Date – If populated, a link to edit the employee's Separation displays.
  - Retirement Date – If populated, a link to edit the employee's Retirement record displays.
  - Comments (optional)
- The 'Employee Date Change Details' form can be accessed from the Staff Action Console or Staff Action Search form.

Changes to 'Edit Assignment' Form & New 'Edit Assignment Dates / Employment Status' Sub-Form

- 'Last Hire Date' is no longer editable on the 'Edit Assignment' form. Users should use the new 'Correct Employee Dates' form instead.

- Instead of updating 'Employment Status' and Assignment 'Start Date' and 'End Date' on the 'Edit Assignment' form, users must click the 'Edit Employment Status' or 'Edit Assignment Dates' link next to these fields to open the new **'Edit Assignment Dates / Employment Status'** sub-form in a new window.

- Fields on the **'Edit Assignment Dates / Employment Status'** Sub-form:
  - **Position** (read-only) – Position number and description
  - **Start Date** (required) – Must be greater than or equal to Last Hire Date.
  - **Employment Status (now or as of Start Date)**
    - For current assignments, maps to employee's current Employment Status
    - For future assignments, maps to Pending Status Change effective on Assignment Start Date
    - If employee's current Employment Status is a Leave or Suspension Code, field is not editable. Otherwise, it is editable and required, and any Active Status may be selected.
  - **End Date & related fields** – Available fields depend on which of the following five (5) scenarios applies (Instructions display at the bottom of the form):
    1. **No Assignment End Date**
       - Instructions:
         - Click 'Drop Assignment' if this assignment is ending but the employee is NOT separating or transferring to another assignment.
         - If the employee is separating or transferring, create a Separation from the Staff Action Console, or select 'Assignment > Transfer' from the Employee Demographics page.
       - 'Drop Assignment' link displays next to 'End Date.' When clicked, 'Drop Assignment' section displays.
       - 'Drop Assignment' section:
         - **End Date** (required) – Must be > Start Date
         - **Employment Status as of End Date** – Defaults to same value as 'Employment Status (now or as of Start Date)'
           - If modified, the status change will take place on the <u>day after</u> the assignment ends.
         - **Post on Board Report?** – Yes or No
         - **Board Report Date** – Required if Post = Yes
         - **Comments** (optional)
    2. **End Date matching Separation Effective Date**
       - Instructions:
         - Employee has a Separation effective on the Assignment End Date.
           - Click 'Drop Assignment Prior to Termination Date' if this assignment will end prior to the Separation Effective Date.
           - To edit the Separation Effective Date or cancel the Separation, select the Separation from the Staff Action Console and choose 'Edit Separation' or 'Remove Separation.'
       - 'Drop Assignment Prior to Termination Date' link displays next to 'End Date'. When clicked, 'Drop Assignment' section displays (same as scenario #1 above).
       - If entered, End Date entered should be less than Termination Date.
    3. **End Date matching Transfer Effective Date**
       - Instructions:
         - Employee has a Transfer effective on the Assignment End Date.

        - Updating the Assignment End Date will also update the Transfer Effective Date. You may also need to adjust the Start Date on the employee's new assignment.
        - Click the 'Cancel Transfer' checkbox to cancel the Transfer. This will remove the Assignment End Date AND remove the related new assignment *unless the transfer was from multiple assignments.*
  - Fields:
    - **End Date** (required)
    - **'Cancel Transfer' checkbox**

4. **End Date matching 'Drop Assignment' Effective Date**
   - Instructions:
     - Employee has a 'Drop Assignment' record effective on the Assignment End Date.
       - Updating the End Date or Employment Status will also update the 'Drop Assignment' record.
       - Click the 'Cancel Drop Assignment' checkbox to cancel the 'Drop Assignment'. This will remove the Assignment End Date and remove any related pending status change.
   - Fields:
     - **End Date** (required)
     - **Employment Status as of End Date** – defaults from 'Drop Assignment' record
     - **'Cancel Drop Assignment' checkbox**
     - Note that the 'Post on Board Report?' and Comments fields do not display when editing a 'Drop Assignment' record.

5. **End Date without any matching staff action**
   - Instructions:
     - The Assignment End Date is not associated with any Staff Actions. Adjusting the End Date will not result in any Staff Actions being created or updated.
   - Fields:
     - **End Date** (not required)

- The following validation and updates take place when the **'Edit Assignment Dates / Employment Status'** sub-form is submitted:
  - If the Primary Assignment Indicator (main Edit Assignment form) is set to 'Yes', an error displays (and values <u>are not</u> saved) if the Start/End Date range overlaps with another primary assignment for the same employee.
  - If the Primary Assignment Indicator (main Edit Assignment form) is set to ''No', a warning displays (and values <u>are</u> saved) if the employee has no other primary assignments during the Start/End Date range.
  - Assignment Start and End Dates are set to values entered.
  - If 'Employment Status (now or as of Start Date)' was updated, the employee's current Employment Status is updated (for current assignments), or a Pending Status Change is created (for future assignments).
  - The Position Status is updated as follows:
    - Future assignment – 'Vacant'
    - Current assignment with End Date – 'Pending Vacant'
    - Otherwise – 'Staffed -Fully' or 'Staffed -Partially', depending on Percent or Hours Employed in relation to Position Percent Funded or Position Hours
  - For Scenarios 1 and 2 (see above):
    - If an End Date was entered, a 'Drop Assignment' staff action record is created.

        - If 'Employment Status as of End Date' was updated, the employee's current Employment Status Code is updated (for past End Date), or a Pending Status Change is created (for future End Date) with Effective Date set to the day following the Assignment End Date.
    - For Scenario 3 (see above):
        - If End Date was updated, the Transfer Effective Date is set to the revised Effective Date.
        - If the user selected 'Cancel Transfer', the Transfer status is set to 'Cancelled', the new assignment is deleted (unless the Transfer was from multiple assignments), and any related Pending Status Change is cancelled.
    - For Scenario 4 (see above):
        - If End Date was updated, the 'Drop Assignment' Effective Date is set to the revised Effective Date.
        - If the user selected 'Cancel Drop Assignment', the 'Drop Assignment' status is set to 'Cancelled' and any related Pending Status Change is cancelled.

- When editing a future assignment, if the user clicks the 'Delete This Future Assignment' button:
    - The status of any associated 'Transfer' or 'New Assignment for Current Employee' record will be set to 'Cancelled'.
    - If the assignment being deleted was the result of a Transfer, the End Date will be removed from the old assignment.

New 'Assignment Action Details' Form

- A new 'Assignment Action' Details form allows authorized users to view the details of 'Transfer', 'New Assignment for Current Employee', and 'Drop Assignment' records.
- Systems Administrators, HR Staff Action Officers, Staff Action Clerks, and Employee Hire roles can access this form from the Staff Action Console or Staff Action Search form.
- The new form includes the following fields: Status, Action Type, Effective Date, Old and New Position Number, Employment Status, and Type of Transfer and Board Item Type (Transfers only).
- ***Note:*** There is no option to Edit or Remove an 'Assignment Action' record from the 'Assignment Action Details' form. However, you may cancel the action *before the Effective Date* by doing the following:
    - To cancel a 'Drop Assignment':
        - Go to Edit Assignment > click 'Edit Assignment Dates' > select 'Cancel Drop Assignment'
    - To cancel a 'Transfer':
        - Go to Edit Assignment for the Old assignment > click 'Edit Assignment Dates' > select 'Cancel Transfer'.
        - Go to Edit Assignment for the New assignment > click 'Delete This Future Assignment'
    - To cancel a 'New Assignment for Current Employee':
        - Go to Edit Assignment for the New assignment > click 'Delete This Future Assignment'

Changes to 'Staff Action Archive Agent'

- The Staff Action Archive Agent is a background process that runs at 8:15 p.m. daily and archives completed staff actions. The agent has been modified to archive 'New Hire' and 'Assignment Action' records with an Effective Date less than or equal to the current date.

Changes to 'Staff Action Console' Form

- The following new staff action types are now included in the staff actions grid:
  - Assignment Action – 'New Assignment for Current Employee', 'Transfer', and 'Dropped Assignment'
  - Employee Date Change
  - New Hire
- For Systems Administrators, HR Staff Action Officers, Staff Action Clerks, and Employee Hire roles:
  - 'Correct Employee Dates' has been added to the drop-down menu at the top of the Staff Action Console
  - Details of Assignment Actions, Employee Date Changes, and New Hire staff actions can be accessed by clicking the link the 'Type' field.

Changes to 'Staff Action Search' Form

- The following new staff action types have been added to the 'Type' selection option:
  - Assignment Action
  - Employee Dates (aka Employee Date Changes)
  - New Hire
- For Assignment Actions, the following Sub-Types are available:
  - Dropped Assignment
  - New Assignment for Current Employee
  - 'Transfer From' and 'Transfer To' – These are separate options since the Site (available as a search option and listed in the search results) can be different for the old and new assignments.
- For Systems Administrators, HR Staff Action Officers, Staff Action Clerks, and Employee Hire roles, the 'Type' field for the new staff action types is a hyperlink to the associated Details form.

Conversion of old Staff Action Records

- Old Transfer records from the HRMSLEA.STAFF_ACTION table (Sta_action_cd = 'XFR') will be copied to the new HRMSLEA.ASSIGNMENT_ACTION table in this release.
  - Since no Effective Date is available for most 'XFR' records, the End Date for the old position assignment is used as the Transfer Effective Date.
  - The following 'XFR' records will NOT be converted:
    - Transfers where the Start and End Date of the old or new assignment are the same.
    - Transfers with more than 60 days between the End Date of the old assignment and the Start Date of the new assignment.
    - Transfers with more than 7 days overlap between the old and new assignments.
- The decision was made not to convert New Hire records from the STAFF_ACTION table (Sta_action_cd = 'NEW') to new data model due to inconsistencies in the historical data.

Misc. Enhancements & Bug Fixes

- A new Type of Action, 'New Employee without Assignment,' was added to the 'Create Promotion/Demotion/Salary Change' form
- The notification email sent when a Vacancy Permit is created has been modified to include Position Grade and Budget Codes.
- The 'Change SSN' process has been modified to include the new Assignment Action and Employee Date Change records. (The Hire table, which includes both New Hire and Re-employment records, was already included.)

- The following Actions have been removed as options on the 'Action Notice Recipients' configuration form: ACG: Modify Assignment, AEM: Additional Employment, NEW: New Hire, XFR: Transfer, DTE: Correct Hire Date, and LGV: Update Longevity. Notifications will no longer be generated for these actions.
- A bug was fixed that occurred when the user updated a Position Description and that change did not trickle down to an active Position Announcement.

V6.4.1 (March 2014)

Background information: The purpose of this release was to address several 2013 legislative changes made by the NC General Assembly. Employees are no longer eligible to earn Tenure, so the Tenure Status in HRMS has been changed to allow updating only to locally-defined Tenure Status Codes. The ability to create Probationary contracts has been removed, and remember that the ability to create Career contracts was removed in the last release. The ability to create new Teacher contracts(for the 25% of teachers that will be offered and accept the pay increase beginning next year in exchange for giving up their Tenure) has been added. This new Teacher contract will also be used for full-time teachers that will start on the first day of school, each school year. When creating new Teacher contracts, LEAs will need to add some new information, including Beginning School Year, Term of Contract and Months of Employment.

More details about the enhancements and changes in LEA Release 6.4.1 follow below.

Changes to 'Create Contract' Form

- The 'Create Contract' form has been modified to no longer allow LEAs to create Probationary contracts.
- LEAs can now create Teacher contracts using the 'Create Contract' form. But the new Teacher contract should not be used unless the individual is providing services for the 2014-15 school year. Note also that Teacher contracts should only be used for teachers who start on the first day of the school year. If a teacher starts on the 2nd day (or anytime later), they should have a Temporary contract.
- When creating a new Teacher contract, LEAs will be required to enter the following information:
  - Contract Type ("Teacher")
  - Beginning School Year
  - Term of Contract (Years) – select either "1" or "4" for 2014-15
  - Months of Employment
  - Contract Effective Date
- "Temporary" contracts have been re-labeled "Temporary Full-Time" contracts to be more descriptive. "Part-Time" contracts have also been re-labeled "Temporary Part-Time" contracts.

Changes to 'Edit Contract' Form

- The 'Edit Contract' form has been modified to no longer allow LEAs to edit Career and Probationary contracts. (If a Career or Probationary contract is opened on this form, it will be displayed in read-only mode). LEAs will also not be allowed to change other contract types to "Career" or "Probationary" contracts using the 'Edit Contract' form.
- LEAs will be able to edit the new Teacher contracts using the 'Edit Contract' form. When editing Teacher contracts, the following information will be required:
  - Beginning School Year

  - Term of Contract (Years)
  - Months of Employment
  - Contract Effective Date
- Note that Contract Type should not be changed to “Teacher” contract unless the individual is providing services for the 2014-15 school year. Teacher contracts should only be used for teachers who start on the first day of the school year. If a teacher starts on the 2nd day (or anytime later), they should have a Temporary contract

Changes to ‘Mass Build Contracts’ Process

- Old Career contracts have been made available for selection when starting the process for creating a new group of contracts. Previously, Career contracts could not be selected because once an employee received a Career contract, they never needed a subsequent contract to be created.
- When generating a group of new contracts, Probationary contracts can no longer be created. (In v6.4, the ability to create a group of new Career contracts was also removed.)
- When creating a group of new Teacher contracts, LEAs will need to include the following information:
  - Contract Effective Date
  - Beginning School Year
  - Term of Contract (Years)
  - Months of Employment
    - Note that when a group of new Teacher contracts is created, all Teachers in that group will be assigned the same number of Months of Employment. So you may need to divide the teachers up into several groups when creating contracts, if they have differing Months of Employment.

Changes to ‘’License, Contract and Assignment’ Form

- The first section in the search results for each employee (orange header) includes a column that was previously labeled “Career”. This is actually the Tenure Status value for the employee, so the label has been changed to “Tenure Status”.
- The fourth section in the search results for each employee (pink header) is labeled “Contracts”. In this grid, the following changes were made in this release:
  - The “Begin” label was changed to “Start Date”.
  - The “End” label was changed to “End Date”.
  - A new “Begin Sch Yr” (Beginning School Year) column was added.
  - A new “End Sch Yr” (Ending School Year”) column was added.
  - New “Contract Term” and “Months of Employment” columns were added to the right of the “Type” column. These columns are applicable for Teacher contracts only.

Other Miscellaneous Changes and Enhancements

- The “Tenure Status Mass Update” no longer provides the ability to mass update the Tenure Status Code to any of the system-defined codes. LEAs are allowed to change Tenure Status only to one of their locally-defined codes.
- The new Term of Contract and Months of Employment fields (for Teacher contracts) have been added to the Query Builder.
- The ‘LEA Settings’ Configuration Management form has been modified to allow LEAs to indicate when they have migrated to the new K12 Enterprise payroll system. If your LEA has migrated to the new K12 Enterprise payroll system, change the “Payroll System in Use” field to

"K12Enterprise". Please note that you should NOT change this value to "K12Enterprise" until your LEA has fully migrated to the new system.
- A new Web Report called 'Assignments with Missing Salary Information' has been added. The report lists assignments that were added after the 6.4 release, but where salary information was not completed on the Edit Assignment form.

V6.4 (February 2014)

Background information: Under NC's G.S. 115C-320 (Public Records Law), the public has the right to request certain personnel information about school system employees, including name, current position, date and amount of each increase or decrease in salary, and date and type of each promotion, demotion, transfer, suspension, separation, or other change in position classification. See http://www.ncga.state.nc.us/EnactedLegislation/Statutes/HTML/BySection/Chapter_115C/GS_115C-320.html for specifics of the public records legislation.

Up to this point, the HRMS LEA module has allowed tracking of some basic salary information for each employee's assignments, including Salary Schedule/Pay Table, Grade and Step. But it has never captured promotion and demotion information, nor has it been programmed to retain history on increases or decreases for each employee's assignment(s). Consequently, HRMS was unable to collect sufficient data to provide public records information mandated by G.S. 115C-320. The primary purpose of this release was to provide a mechanism for LEAs to begin tracking Promotions, Demotions and Salary Changes for each assignment in HRMS, in addition to the salary information that is already being collected.

For employees with HRMS assignments, the salary information will be recorded in the "Salary Information" section of the 'Edit Assignment' form. The 'Add Assignment' form has been modified so that salary information inherited from the Position is still displayed on the form, but the user must switch into 'Edit Assignment' mode before salary information for the assignment can be recorded. Once on the 'Edit Assignment' form, the user will record the Promotion, Demotion and/or Salary Change information in the same "Salary Information" section where the Percent Employed, Base Pay Table, Grade and Step is entered or edited. This operates in a similar fashion that users are accustomed to when entering/editing budget code information.

For employees who do not have an HRMS assignment, the salary information will be entered into the new standalone 'Promotion/ Demotion/Salary Change' form accessed from the Staff Action Console.

Promotion/Demotion/Salary Change staff action records cannot be edited. Instead, if one of these staff actions was entered in error, it must be removed (cancelled) and re-entered. Each time a Promotion, Demotion or Salary Change is created or cancelled, the system will log historical information about the staff action. A history log will allow authorized users to view the details of each staff action.

Please note that although salary information can be entered in HRMS at the individual assignment level, there is no capability in HRMS to record across-the-board salary increases in mass, for large groups of employees. Those across-the-board staff actions will need to be captured and recorded within the LEAs' Payroll systems.

The 'Staff Action Console' and 'Staff Action Search' forms have also been expanded to include the new Promotion/Demotion/Salary Change staff actions. More staff actions are slated to be added in v6.4.2.

Several changes have also been made in this release as a result of recent legislative changes made by the NC General Assembly. Specifically, Career contracts can no longer be created in HRMS, and updating of Tenure Status to system-defined codes is no longer allowed.

More details about the new features and forms that have been added in LEA Release 6.4 follow below.

Changes to 'Add Assignment' Form

- The 'Add Assignment' form has been modified so that salary information inherited from the Position (Payment Method, Percent/Hours Funded, Base Pay Table, Grade and Step) is still displayed on the form (in the "Position Salary Information" section), but this information is no longer editable on this form. Instead, the user must switch into 'Edit Assignment' mode (by clicking the "Save & Edit" button) before entering/editing the salary information for the assignment. This operates in a very similar fashion to the way users switch into 'Edit Assignment' mode before entering/editing budget code information when adding an assignment.
- Because the 'Salary Information' portion of the 'Add Assignment' form is no longer editable, the 'Local Use Fields' section has been moved up on the form above the "Position Salary Information" section. The reason this section was moved up is so that the "Cancel" and "Save & Edit" buttons immediately follow the editable sections on the form, which should reduce confusion.
- The 'Add Assignment' form has also been modified to require the user to update the employee's Employment Status Code to an active value if the current value is "None" (00) or if the current Employment Status is an Inactive code.

Changes to 'Edit Assignment' Form

- The 'Edit Assignment' form has been modified so that when the form initially loads, the "Salary Information" section (Payment Method, Percent/Hours Funded & Employed, Base Pay Table, Grade and Step) is not editable. When users are ready to edit salary information or enter Promotion, Demotion or Salary Change information for this assignment, they should click on the "Edit Salary Information and/or Record Promotion/Demotion/Salary Change" link at the top of the "Salary Information" section. Clicking this link will open up the "Edit Salary Information" card so that users can edit Percent Employed/Hours Per Week, Base Pay Table, Grade and Step.
- Beginning with v6.4, users now have the opportunity to enter any applicable Promotion, Demotion and/or Salary Change information when they are entering/editing salary information.
- Fields available when recording a Promotion, Demotion or Salary Change include:
  - **Type of Action** (required) – Available options are: Promotion with Salary Increase, Promotion without Salary Increase, Demotion with Salary Decrease, Demotion without Salary Decrease, Salary Change Only, Initial or Additional Assignment, Data Correction, and Lateral Transfer.
  - **Effective Date** (required) – Must be between the Assignment Start and End Dates. Effective Date defaults to the Assignment Start Date for Initial Assignments and Lateral Transfers.
    - Note that the old "Effective Date" field that appeared on the 'Edit Assignment' form immediately preceding the Assignment Start Date has been removed. However, the Assignment Effective Date field in the database will be populated with the value entered for Assignment Start Date.
  - **Old Salary Amount**, **Old Pay Basis, Old Percent Employed or Hours/Week, New Salary Amount** and **New Pay Basis** – These fields are required for all actions involving a Salary Change. New Salary Amount is required for Initial Assignments.

  - Users should enter the salary information **for this assignment only**. Amounts included on this form do not necessarily equate to the employee's total salary, if the employee has additional assignments. HRMS should never be considered the source of record for reporting an employee's current salary information; the LEA's Payroll system will always be considered the system of record for that information. But HRMS now provides a mechanism for entering salary change information at the individual assignment level that can be included on a Public Records report, to be developed in a later release.
- **Reason** – Required if the Type of Action involves a Promotion, Demotion , Salary Change or Change in Hours/Percent Employed. Note that the Reason must be selected from a pre-defined list, rather than entering it as free-form text. This is necessary because courts have the right to subpoena information from HRMS databases, and we need to ensure that reasons chosen for Promotions and Demotions are defendable in court.
- **Was it authorized by the local Board of Education**? **–** Required if user selected the Reason 'Result of disciplinary action'.
- **Post on Board Report?** (required) and **Board Report Date**
- **Comments** – Required for some Types of Action, and optional for others.

- Promotions, Demotions and Salary Changes that were previously entered for the assignment will be listed in a grid at the bottom of the Salary Information section. Clicking on a row in the grid will display the details of the Promotion, Demotion, or Salary Change action in another window. (Details can also be accessed from the Staff Action Console for the specific employee.)

Updates to 'Staff Action Console'

- The 'Staff Action Console' has been updated to include Promotion/Demotion/Salary Change staff actions. Effective with v6.4.2, more staff actions will be added to this form and it will ultimately become the portal for viewing and initiating all staff actions for a selected employee.
- All salary-related staff actions are now included in the grid on the 'Staff Action Console'. Contents of the "Type" column for these staff actions serve as a hyperlink to the 'Promotion/ Demotion/Salary Change Details' form for Systems Administrators, EmpHires, HT Staff Action Officers and Staff Action Clerks.
- The 'Staff Action Console' form is now the launching point for creating a new Promotion/Demotion/Salary Change staff action for employees who do not have an HRMS assignment (see 'New Standalaone Promotion/Demotion/Salary Change Form'). Promotion/Demotion/Salary Change staff actions for employees with an HRMS assignment will be recorded in the "Salary Information" section of the 'Edit Assignment' form.

New Standalone 'Promotion/Demotion/Salary Change' Form

- A new 'Create Promotion/Demotion/Salary Change' form has been added in this release for the purpose of recording Promotions, Demotions and Salary Changes for employees who are not in assignments in HRMS (e.g., Substitutes). This form captures much of the same information that the 'Edit Assignment' form captures for employees who are in HRMS assignments.
- This new form is accessed by selecting the "Create Promotion/Demotion/Salary Change" link from the Staff Action Console. Users authorized to perform this staff action include Systems Administrators, EmpHire, HR Staff Action Officers, and Staff Action Clerks.
- This form may only be used for employees who do not have an assignment in HRMS. An error will display if an attempt is made to access this form for an employee with an HRMS assignment.
- Fields on the standalone 'Promotion/Demotion/Salary Change' form are the same as those available on the 'Edit Assignment' form (see 'Changes to Edit Assignment Form'), except that

Old Percent Employed or Hours is not captured and the ‘Initial Assignment’, ‘Lateral Transfer’, and ‘Data Correction’ options are not available for ‘Type of Action.’

Viewing Details of a Promotion/Demotion/Salary Change

- The ‘Promotion/Demotion/Salary Change Details’ form includes complete information about the selected staff action. It is reached by selecting a specific Promotion/Demotion/Salary Change record displayed on the selected employee’s ‘Staff Action Console’ form. It can also be accessed from the search results grid on the ‘Staff Action Search’ form. Roles with authority to access this form include:
  - Systems Administrators, EmpHires, HR Staff Action Officers and Staff Action Clerks
- This form displays all information about the selected Promotion/Demotion/Salary Change and serves as the launching point for removing/cancelling existing records. Only Systems Administrators have authority to remove a Promotion/Demotion/Salary Change.
- If you need to edit a Promotion/Demotion/Salary Change, you will have to remove the record and add it back with the correct values.
- For details about Promotion/Demotion/Salary Change staff actions, see the Staff Action History section at the bottom of the ‘Promotion/Demotion/Salary Change Details’ form. This grid contains one row for each staff action that has been logged for the Promotion/Demotion/Salary Change.
  - If authorized users wish to see more detailed information about a particular staff action in this grid, they may click on the ‘Type’ hyperlink to link to the ‘Promotion/Demotion/ Salary Change Staff Action Details’ form.

Removing/Cancelling a Promotion/Demotion/Salary Change

- The ‘Remove Promotion/Demotion/Salary Change’ form should be used to cancel a Promotion/Demotion/Salary Change record that was recorded in error. This form is reached by selecting the “Remove Promotion/Demotion/Salary Change” option on the ‘Promotion/Demotion/ Salary Change Details’ form accessed from the Staff Action Console.
- Note that removing a Promotion/Demotion/Salary Change does not restore the employee’s assignment salary information (Base Pay Table, Grade, Step, etc.) back to the previous values. You must return to the Edit Assignment form to adjust the employee’s salary information if needed.
- The “Remove” (or Cancel) function is available only to Systems Administrators.

Updates to ‘Staff Action Search’ Form

- The ‘Staff Action Search’ form has been updated to include Salary staff actions and allows authorized users to search for Promotions, Demotions and all salary-related staff actions across the LEA. As additional staff actions are added to HRMS in future releases, they will be added to this form.
- The same roles that had permission prior to v6.4 will have access to the new ‘Staff Action Search’ form:
  - Systems Administrator, LOA Editor, LOA Viewer, Suspension Clerk, Separation Editor, Separation Viewer, HR Staff Action Officer, Staff Action Clerk, EmpHire, and Finance Officer.
  - These roles have authority to search **all** Staff Action Types available on this form; but only roles with proper authority have the ability to drill down to view details of individual staff actions.

- To search for salary-related staff actions on the Staff Action Console, select “Salary Info” as the Type. Then you may select one or more Sub-Types that correspond to the ‘Type of Action’ field on the Promotion/Demotion/Salary Change form. If you don’t select a Sub-Type, the system will default to selecting all salary-related staff actions.
- Salary staff action results are returned in the grid that includes Staff Action Type, Effective Date, Staff Action Status, Site, Name, SSN, and Current Employment Status. For Systems Administrators, EmpHires, HR Staff Action Officers and Staff Action Clerks, the Staff Action Type column serves as a hyperlink to the “Promotion/Demotion/Salary Change Details” form. Search results are sorted by Last Name, First Name and Effective Date, but can be re-sorted by column headings.

Changes Made Due to 2013 Legislative Changes

- The ability to create new Career contracts has been removed from the ‘Create Contract’, ‘Edit Contract’ and ‘Mass Build Contract’ forms.
- LEAs may no longer change Tenure Status Codes to any of the system-defined codes on the ‘Create Contract’, ‘Edit Contract’, ‘Employment Status/Benefits’ and ‘New Employee Salary and Benefits’ forms. (The system-defined codes include: Career, N/A, Temp, 1 of 1, 1 of 4, 2 of 4, 3 of 4, and 4 of 4.) LEAs may continue to update Tenure Status Codes to any of the locally-defined codes that they are established on the ‘Tenure Status’ Configuration Management form.
- A snapshot of each employee’s current Tenure Status Code will be captured when v6.4 rolls out, for possible future reference. If at a later date LEAs need to determine what an employee’s Tenure Status was set to before v6.4 was rolled, they should contact the DPI Help Desk.

Changes to Employee Summary Form

- The following new fields have been added to the Employee Summary form:
  - Retirement Date
  - UID
  - Work Email Address
- The following fields have been removed from this form, because they are no longer used:
  - Disabled person?
  - Tenure Status
  - Tenure Date
  - Paid Mentor?
  - Mentor Name
  - Mentor Rate
  - NCLB Qualification Status
  - NCLB Date Qualifications Met
  - NCLB Qualification Criteria
  - NCLB Degree Level
  - NCLB Academic Content Area
  - NCLB Test Type

Miscellaneous Bug Fixes & Enhancements:

- When running HRMS using I.E. 11, while not in compatibility mode, the message below was previously being displayed. This issue has been corrected with the rollout of v6.4.
  - “HRMS currently requires Internet Explorer for all features except ‘Lookup My CEUs’, which also works with Firefox.”

- Corrected an error that was occurring when one of the phone numbers on the 'Employee Demographics' form was updated when an email domain was entered on the 'LEA Settings' form and the email address contained an apostrophe.
- Corrected a bug that allowed Position Title Codes to be updated on the 'Position Title' Configuration Management form. Although it is at the LEAs' discretion to create the Position Title Codes, they must remain static once they are created in order to keep internal HRMS table in synch.

V6.3.3 (September 2013)

Background information: The purpose of this release was to provide a new configuration form that allows LEAs to specify whether they accept applications from the NC School Jobs website and/or provide instructions to applicants searching for jobs or applying to their school district. The new 'NC School Jobs Settings' form serves two major purposes:

1) It allows LEAs using third-party application websites to direct applicants to the correct location to view job postings and submit job applications.
2) It allows LEAs who use the NC School Jobs website to provide custom messages regarding job postings and/or application requirements for the LEA.

More details about this new feature and other miscellaneous enhancements and bug fixes included in LEA Release 6.3.3 follow below.

Note: Items highlighted in red require some attention on the part of the LEAs.

New 'NC School Jobs Settings' Form

- Systems Administrators can access the new 'NC School Jobs Settings' Form from the 'LEA Configuration' page.
- If your LEA does not accept applications from the NC School Jobs website or uses the website in a limited way, it is very important that you complete the new configuration form as soon as possible. Information entered on the new configuration form will begin displaying on the School Jobs website by 9/25/13.
- The form includes the following fields:
  - *School District Website URL* – Address of your school district's public website. You may wish to enter a specific page on your website, like the Employment or Jobs page.
  - *LEA Accepts Applications from NC School Jobs Website?* – Defaults to 'Yes'. **If you select 'No', applicants will no longer be able to submit applications to your LEA from the NC School Jobs website.**
    - *Job Application Website URL* – Address of your LEA's job application website. This field displays and is required if you answer 'No' to the question above.
  - *Display custom message when user searches for jobs?* – Indicates whether a special message should display when an applicant searches for jobs at your LEA using the 'Find Jobs' feature on the NC School Jobs website. This field is automatically set to 'Yes' if you answered 'No' to 'LEA Accepts Applications from NC School Jobs Website?' However, even if you accept applications from the NC School Jobs website, you may still elect to display a custom message when applicants search for jobs at your LEA.
    - *Message Text* – Text that should display when an applicant searches for jobs at your LEA.
    - *Direct Applicants to* – Website that applicants will be directed to for more information when searching for jobs (either your School District or Job Application website).

- *Display custom message when user applies to District?* – Indicates whether a special message should display when an applicant submits or previously submitted an application to your LEA from the NC School Jobs website. This field is automatically set to 'Yes' if you answered 'No' to 'LEA Accepts Applications from NC School Jobs Website?'
  - *Message Text* – Text that should display when an applicant submits or previously submitted an application to your LEA.
  - *Direct Applicants to* – Website that applicants will be directed to for more information when they submit or previously submitted an application to your LEA. This is either your School District or Job Application website.

Miscellaneous Bug Fixes & Enhancements:

- The following three questions have been removed from the Bus Driver application on the NC School Jobs Application website, so they were removed from the Bus Driver "View Application" form:
  - Are you medically qualified?
  - Do you have a history of diabetes, heart trouble, fainting or dizzy spells, seizures, alcoholism, or use of drugs?
  - Do you have less than 20/40 vision corrected or uncorrected in each eye?
- The following data elements that were added in recent releases were added to Query Builder in this release:
  - Address Confidentiality Program indicator
  - Personal Email Address
  - Rehire Eligibility Date
  - Position Evaluation Category
  - Position Pre-K Teacher indicator
  - Site Title I Code
  - LEA Email Domain
- A new report group was added to Query Builder called "Assignment Budget View (Without Local Use)." This is a copy of the "Assignment Budget View (Payroll)" report group without the employee, position, and assignment local use fields. The new report group can be used when local use fields are not needed.
- A change was made to the "Search Applicants" form so that when the user selects the "Eligibility" action in the search results, the message has been revised to say, "This candidate is on DO NOT HIRE List, and may not be selected without prior approval from your HR officer. IMPORTANT: THIS IS CONFIDENTIAL INFORMATION THAT SHOULD NOT BE SHARED WITH THE CANDIDATE OR ANYONE ELSE."
- A bug was corrected on the "Search Applicants by Vacancy" form that caused an issue when the Position Description contained the "%" character.
- A few License Areas were added or updated in the License Area lookup table.
- Based on legislative changes made in July 2013, a warning message was added when users create or edit a Career contract.
- Percent and Hours Employed columns were added to the "Site Assignment Info" Report.

V6.3.2 (July 2013)

Background information: The purpose of this release was to add a couple of new LEA Web Reports needed for the Truenorthlogic data cleanup, to enhance the UID Update process, and to provide several other minor enhancements and bug fixes. A new 'Copy Payroll SSN Name / Update Verified Indicator' mass update form has also been created in this release that replaces the old 'Copy Payroll

Name to SSN Name' and 'SSN Name Verification' forms. More details about the changes and new features included in LEA Release 6.3.2 follow below.

LEA Web Reports Created for Truenorthlogic Data Cleanup (Implemented 5/22/13)

- A new 'Pre-K Teacher Licensed Positions' report (000134) was implemented on 5/22/13. This report prints a list of all Licensed positions with the Pre-K indicator set to "Yes". If the position is filled, the name of the assigned employee is included on the report.
- A new 'Employees with Incomplete/Invalid Tenure Status and/or BT Status' report (000135) was also implemented on 5/22/13. This report prints a list of all active employees assigned to a Licensed position who have a Tenure Status and/or BT Status Code that is missing or invalid.
    - If a Licensed employee's Tenure Status and/or BT Status Code is blank or missing, or if the Position Evaluation Category = "Teacher" and their Tenure Status Code = "N/A", they will appear on the report.

Enhancement to UID Update Process:

- Modified the UID Update process to pull UIDs directly from Payroll every morning, to be displayed in HRMS. This will eliminate delays in the previous process between the time the UID is created in Payroll and when it becomes available in HRMS.

Changes to 'View Application' form:

- The wording on two of the questions in the Teaching License section of the 'View Application' form has been changed as follows. This was needed because the wording on the actual application has also been changed recently.
    - Question #5 previously read: "Have you ever been placed on a performance improvement plan or action plan?" This question has been changed to read: "Have you ever been placed on a performance improvement plan, action plan or Mandatory Improvement Plan?"
    - Question #6 previously read: "Have you received 'unsatisfactory' or 'below standard' rating on an evaluation within the last two years?" This question has been changed to read: "Have you received an overall or summative rating of 'Unsatisfactory', 'Below Standard', 'Developing' or 'Not Demonstrated' on an evaluation within the last two years?"
    - Corrected a bug in the General Questions section of the 'View Application' form that (in rare situations) was causing the response entered for Question 1 to display with Question 2.

New HRMS Mass Update – 'Copy Payroll SSN Name / Update Verified Indicator' Form

- A new HRMS Mass Update 'Copy Payroll SSN Name / Update Verified Indicator' form has been added in this release. This replaces both the old 'Copy Payroll Name to SSN Name' and 'SSN Name Verification' mass updates. (LEAs had been encountering difficulties running these old mass updates, and it made more sense to combine them into one new mass update rather than to try to address the issues with the old mass updates.) The Systems Administrator and Mass Update roles have access to the new form.
- Authorized users enter Search Criteria to select employees to be included in the mass update. Users can list employees whose HRMS names matches their Payroll name, those whose name differs from their Payroll name, or employees not in Payroll.
- This mass update can be used to copy a group of selected employees' Payroll Name to HRMS Name, and/or to set the 'SSN Verified' indicator to either "Unverified" or "Verified".

Other LEA Web Reports

- A new ‘Employee Name on Social Security Card Not Verified’ report (000136) has been added in this release. This report prints a list of all employees where “Name as it appears on Social Security Card – Verified” check box is not checked on their Employee Demographics form.
- The ‘Employee Name Discrepancies between HRMS, Licensure and Payroll’ report has been modified to include Position Number and Description, and Site Number and Description. In addition, a bug was fixed for ISIS LEAs that was causing some employees to display on this report even though their names HRMS and Payroll matched.
- The new ‘Copy Payroll SSN Name / Update Verified Indicator’ mass update listed above can be used to mass update the “Name as it appears on Social Security Card – Verified” indicator for a group of employees, and/or to copy the Name from Payroll to HRMS for a group of selected employees.

Miscellaneous Bug Fixes & Enhancements:

- In the HRMS Licensure Forms module, Forms G and N have been modified to make all current License Areas available for selection.
- All CEU forms in HRMS have been updated to change the “Principal Credits” label to “School Adm Credits”.
- The ‘Licensure Data’ form has been modified to clarify the display of “Degree Level” information. Previously, the value displayed in the “Degree Level” column for each License Area was the maximum degree that the employee had on file with Licensure. The maximum degree that the employee holds does not necessarily mean that their highest degree level is applicable to the individual License Area.
    - To make this clearer, the employee’s maximum degree level is now displayed in the “Licensure data” section at the top of the form. But the individual License Areas listed in the “License Areas” section reflect the degree level that is associated with each License Area (in the “Class” column).
- Modified the LEA Home Page so that if a user logs on using an I.E. 9 or 10 browser, a warning message box is displayed instructing the user that they need to turn on Compatibility mode. A similar message with a link for instructions for turning on Compatibility mode is included on the lower portion of the Home Page also.

V6.3.1 (May 2013)

Background information: A new ‘Create Re-employment’ form was deployed in v6.3 that provides LEAs a way to record a “Re-employment” staff action and clear out an employee’s Termination Date if they left the LEA previously but are being rehired. One of the primary purposes of this release was to add the capability to edit or remove “Re-employment” staff actions.

Another primary function of this release was to add a couple of new data fields that will be needed for the data feed to the new Truenorthlogic Evaluation software, scheduled to be rolled out in July 2013. Two new fields have been added to the Position forms in HRMS: Position Evaluation Category and Pre-K Teacher indicator. Both of these new fields apply only to Licensed positions. The new Position Evaluation Category field has been pre-populated as part of the rollout of this release where possible, but LEAs need to run the new Web Report 000132 (Positions without an Evaluation Category) as soon as possible to obtain a list of positions that are missing an assigned Evaluation Category. The new “Pre-K Teacher” indicator has been set to “No” for all Licensed positions, but your LEA will need to set this value for each pre-K teacher position to “Yes” using the ‘Edit Position form’.

A second employee Email Address has been added to the ‘Employee Demographics’ form. Previously, there was only one email address field labeled as “Email”. This field has been re-labeled “Work Email” and a second “Personal Email” field has been added. Please see the **New (Second) Email Address Added to Employee Demographics forms** section below for more details.

Numerous other enhancements have been added in this release. More details about the changes and new features included in LEA Release 6.3.1 follow below.

Note: Items highlighted in red require some attention on the part of the LEAs.

Minor Tweaks to ‘Create Re-employment’ form

- The ‘Create Re-employment’ form has had some additional validation added in this release:
  - If this employee has a previous Re-employment record with no subsequent Separation, the following error message is displayed and the Re-employment form cannot be submitted.
    - “This employee already has a Re-employment record created.”
  - The system will check to see if the selected employee is on the ‘Do Not Hire’ List. If they are, the following error message is displayed and the Re-employment cannot be created:
    - “This employee is on the Do Not Hire List and cannot be re-employed.”
  - The system will check to see if the employee is marked as Sub-par or if they are on the Dismissed Teacher List. If they are, the system will display a warning message at the top of the form, but the user will be allowed to proceed with adding the Re-employment record.
  - The system will check the Licensure database to determine if this employee has a Revoked License. If they do, the following warning message is displayed:
    - “The DPI Licensure database indicates that this individual has a License Revoke Date of 99/99/9999. This should be investigated before completing the Re-employment. Please click OK to confirm that you received this warning.”
    - The user must click “OK” before proceeding with the Re-employment.

New ‘Edit Re-employment’ and ‘Remove Re-employment’ forms

- A new ‘Edit Re-employment’ form has been added in this release. Systems Administrators, Separation Editors, HR Staff Action Officers and EmpHire roles can edit a Re-employment by selecting “Edit Re-employment” on the ‘Re-employment Details’ form.
  - If the Re-employment has already been archived, users can change the Effective Date only to another past date, since the Re-employment has already been processed.
    - If the record is the employee’s most recent Re-employment, you can Remove/Cancel it and create a new one with the correct Effective Date.
  - If the employee’s most recent Re-employment is being edited, their Last Hire Date will be adjusted to match any change in the Re-employment Effective Date.
  - If the Effective Date is changed, the employee’s Assignment Start Dates will be updated if they match the old Re-employment Effective Date.
- A new ‘Remove Re-employment’ form has also been added in this release. Only Systems Administrators have authority to remove a Re-employment, by selecting “Remove Re-employment” on the ‘Re-employment Details’ form.
  - If the selected employee has more than one Re-employment record, only the most recent (non-cancelled) record can be removed. If you wish to remove a Re-employment that is not the employee’s most recent one, you must first remove the employee’s more recent Re-employment(s) and Separation(s) that occurred after this Re-employment.

  - If you attempt to remove an employee's most recent Re-employment but the employee has separated since the Re-employment, you must remove the Separation first.
  - If the reason that the Re-employment record is being removed is because the employee did not report for work, or the LEA withdrew the offer, then you should **not** remove the Re-employment but should enter a Separation instead. ***Re-employments should be removed only if they were entered in error.***
  - If a Re-employment record is removed, the system will set the employee's Last Hire Date and current Employment Status back to the previous values (before the Re-employment was created.) It will also set the employee's Termination Date and Rehire Eligibility Date back to the values saved in the employee's most recent (non-cancelled) Separation record. It will also delete the employee's current and/or future assignments if they have a Start Date that is on or after the Re-employment Effective Date.
- A new 'Re-employment Staff Action Details' form has been added and can be used to view the details of individual Re-employment staff actions, by clicking on a row in the History section of the 'Re-employment Details' form.

New Data Fields on Position forms

- A new "Evaluation Category" field has been added to the 'Create' and 'Edit Position' forms in this release and is required for Licensed positions only. (This is an important data element that may be used in the future for the Truenorthlogic data load, but it will not be included initially in the data load.)
  - For non-Licensed positions, this new field will not appear on the form.
  - Valid values are:
    - Superintendent
    - Associate or Deputy Superintendent
    - Assistant Superintendent
    - Director or Supervisor
    - Principal
    - Assistant Principal
    - Teacher
    - Guidance Counselor
    - Media Specialist
    - Social Worker
    - Psychologist
    - Speech Language Pathologist
    - Audiologist
    - Licensed Support
- A new "Pre-K Teacher" field has also been added to the 'Create' and 'Edit Position' forms in this release and is required for Licensed positions only. (This new field is needed for the upload to the Truenorthlogic Evaluation system.)
  - For non-Licensed positions, this new field will not appear on the form.
  - Valid values are "Yes" and "No".
- The new "Evaluation Category" field was pre-populated as part of the v6.3.1 rollout. Rules used for auto-populating this field are based on the primary Payroll Object Code of the employee currently assigned to the position, as follows:
  - If Payroll Object Code = 111, Evaluation Category = "Superintendent"
  - If Payroll Object Code = 112, Evaluation Category = "Associate or Deputy Superintendent"
  - If Payroll Object Code = 118, Evaluation Category = "Assistant Superintendent"
  - If Payroll Object Code = 113, Evaluation Category = "Director or Supervisor"
  - If Payroll Object Code = 114, Evaluation Category = "Principal"
  - If Payroll Object Code = 116, Evaluation Category = "Assistant Principal"

  - If Payroll Object Code = 121, 123 or 124, Evaluation Category = "Teacher"
  - If Payroll Object Code = 133, Evaluation Category = "Psychologist"
  - If Payroll Object Code = 131 and Purpose Code = 5830, Evaluation Category = "Guidance Counselor"
  - If Payroll Object Code = 131 and Purpose Code = 5810, Evaluation Category = "Media Specialist"
  - If Payroll Object Code = 131 and Purpose Code = 5320, Evaluation Category = "Social Worker"
  - If Payroll Object Code = 133, Evaluation Category = "Psychologist"
  - If Payroll Object Code = 131 or 132 and Purpose Code = 5240, Evaluation Category = "Speech Language Pathologist"
  - If Payroll Object Code = 132 and Purpose Code = 5250, Evaluation Category = "Audiologist"
- For positions that the new "Evaluation Category" field could not be pre-populated by using the Payroll Object Code of the employee currently assigned to the position, the following rules were used to attempt to pre-populate the field:
  - If EEO-5 category = 02 (Principals), Evaluation Category = "Principal"
  - If EEO-5 category = 03 (Assistant Principals - Teaching) or 04 (Assistant Principals – Non-Teaching), Evaluation Category = "Assistant Principal"
  - If EEO-5 category = 05 (Elementary Classroom Teachers) or 06 (Secondary Classroom Teachers), Evaluation Category = "Teacher"
  - If EEO-5 category = 08 (Guidance), Evaluation Category = "Guidance Counselor"
  - If EEO-5 category = 09 (Psychological), Evaluation Category = "Psychologist"
  - If EEO-5 category = 10 (Librarians, Audiovisual Staff), Evaluation Category = "Media Specialist".
- The new "Pre-K Teacher" indicator was set to "No" for all licensed positions as part of the rollout of this release. Please proceed to the "Edit Position" form and set the indicator for all Pre-K teacher positions in your LEA to "Yes".
- A new LEA Web Report was created in this release (000132) that will allow you to obtain a list of all Licensed positions that do not have an assigned position Evaluation Category. Run this report to get a list of positions that were not able to be pre-populated during the rollout of this release and proceed to the "Edit Position" form and select the appropriate Evaluation Category for each position on this report.

New "Title 1" Indicator and "Title 1 Mass Update"

- A new "Title 1 School" indicator has been added to the 'Site Settings' Configuration Management form. This is a required field on the form, and you need to have a Systems Administrator manually enter this information for all Sites in your LEA. These are the valid values for the new "Title 1 School" indicator:
  - School Wide
  - Targeted Assistance
  - Not a Title 1 School
- The label for the "Title 1" indicator on the Position forms has been changed to "Title 1 Designated Position".
- A new "Title 1 Mass Update" option has been added on the Position Management Console. If the user selects a Site and runs this option, the system will set the Title 1 indicator for each position at that Site to "No".
- Note: There is no mass update available to set the "Title 1 Designated Position" indicator for all positions at a Site to "Yes". If you need to perform this type of update, please contact Steve Andrew (DPI Support) for assistance.

Revise SS-510 Categories

- In v6.2.1, the SS-510 Category field was renamed to "Census". But the old SS-510 categories were not converted to the new "Census" categories at that time. The old SS-510 categories have been converted in this release to "Census" categories as follows:
  - New Category 1 "Instructional Personnel" includes the following old SS-510 category:
    - 1 - Teacher Aides (only those paid)
  - New Category 2 – "Other School System Employee" includes the following old SS-510 categories:
    - 3 – Administrative/Clerical Personnel
    - 4 – Plant Operations/Maintenance Personnel
    - 5 – Cafeteria Employees
    - 6 – Bus Transportation Employees
    - 7 – Health/Recreation Employees
    - 8 – Student Employees
    - 9 – All others (excluding teachers)
  - Old SS-510 Category 2 – "Substitute Teachers" positions were converted to a blank Census category.
  - Old SS-510 Category X "Do Not Report" positions were also converted:
    - New Category 1 – "Instructional Personnel" includes the following:
      - Positions where SS-200 category = "Elementary Classroom Teachers", "Secondary Classroom Teachers", "Other Classroom Teachers", "Principals", "Librarians, Audiovisual Staff", "Guidance", "Psychological", "Assistant Principals (Teaching)", "Assistant Principals (Non-Teaching)", "Consultants, Supervisors of Instruction", "Other Professional Staff" or "Teachers Assistants".
      - Positions where SS-300 category = "Superintendents"
    - New Category 2 – "Other School System Employee" includes the following:
      - Positions where SS-200 category = "Officials, Administrators, Managers", "Technicians", "Clerical, Secretarial Staff", "Service Workers", "Skilled Crafts" or "Laborers, Unskilled".
  - All remaining positions that could not be converted using the old SS-510 category or the SS200 or SS-300 category as specified above had its Census Category set to blank. A new LEA web report (000131) was created in this release that contains a list of the positions that could not be converted as part of the v6.3.1 rollout. Please run this report and proceed to the "Edit Position" form to assign a Census category for each position on the report.

Changes to Configuration Management forms

- An "Email Domain" field has been added to the 'LEA Settings' Configuration Management form. This was created so that users do not have to enter the domain when entering employee's Work Email Addresses (see "New (Second) Email Address Added to Employee Demographics forms" section below.)
  - The "Email Domain" field was pre-populated for each LEA based on the Superintendent's email address in the DPI school name and address system (EDDIE). Please contact DPI Support if the pre-populated value is incorrect because the default domain was used to determine which email addresses were moved to the new Personal Email Address field described below.
- Changes were made to the 'LEA Settings' form in v6.2.1 to allow LEAs to indicate that they have migrated to the new ISIS Web Payroll system. For ISIS 6 Web LEAs, the options for the old Payroll interface were removed in that release. In this release, the following options have been added back for ISIS Web LEAs:

- HRMS to Payroll
- Scope of Information to Send to Payroll

New (Second) Email Address Added to Employee Demographics forms

- The old "Email" field has been re-labeled "Work Email". This is not a required field; but if an Email Domain has been entered on the 'LEA Settings' Configuration Management form, users should enter only the first (Name) portion of the email address. (For example, enter only "santa.claus"). If an Email Domain has been entered on the 'LEA Settings' form, it is displayed on the Demographics form to the immediate right of the "Work Email" field and is automatically appended to the Email Address entered by the user, before it is stored in the database.
  - If an Email Domain has not been entered on the 'LEA Settings' form, then users should enter the complete address in the "Work Email" field on the Demographics form. (For example, enter santa.claus@northpole.com).
- When viewing a previously-entered Work Email Address on the Employee Demographics form, if the domain in the email address matches the Domain entered on the 'LEA Settings' form, only the Name portion of the Email address is displayed on the form (and is editable).
  - If the Domain in the Work Email Address does not match the Domain entered on the 'LEA Settings' form, the entire Email Address is displayed on the Demographics form, but the user should remove the Domain so that the default Domain can be used.
- A second Email Address field ("Personal Email") has been added to the 'Employee Demographics' forms in this release. This is not a required field.
  - LEAs will need to enter the complete Email Address (including Domain) into this field.
- Email Addresses in the old "Email" field have been moved to the new "Personal Email" field based on the pre-populated value in the new Email Domain field on the 'LEA Settings' Configuration Management form. Please contact DPI Support if the pre-populated Email Domain is incorrect.

Other Changes to 'Employee Demographics' forms

- A new "Employee Dates" section has been added to the Employee Demographics forms. This section includes the following Employee dates (all are read-only). If a particular date is blank, it will not be displayed on the form.
  - Original Hire Date
  - Last Hire Date
  - Retirement Date
  - Termination Date
  - Rehire Eligibility Date
- Employee Demographics forms have been modified so that if the "Name as it appears on Social Security Card – Verified" box is not checked, a warning message is displayed in a box outlined in red.
- Licensure Name will be displayed on the Employee Demographics forms if there is a discrepancy between the Name in HRMS and the Name in Licensure.
  - The portions of the Licensure Name that are different from the HRMS Name are displayed in red.
- The message "Not eligible for Rehire" displays in red text near the top of the Employee Demographics form if the employee is on the Do Not Hire List. If the user clicks on the small triangle beside the field, the associated comment is displayed.
- The field label for the old "Handicap" field has been changed to "Disabled Person". From this point forward, the only values available in the drop-down list will be "Yes" and "No".
  - All previous values saved for employees have been converted to either "Yes" or "No".

Minor Tweaks on Leave & Suspension forms

- The 'End Leave of Absence/Disability' and 'End Suspension' forms have had minor adjustments in this release. The Insurance Sections have been modified as follows:
  - The "Reinstate Insurance at System Expense?" question is displayed only if "Continue at System Expense" = No, and Reason is "Employee is Returning to Work". This is not a required field.
  - "Reinstate Date" is required only if "Reinstate Insurance at System Expense" = Yes
- The Suspension forms have been modified to change the wording of the question that asks "Was this action voted on by the Board of Education?"

Misc. Enhancements & Bug Fixes

- The "Search by Vacancy" feature on the 'Applicant Search' form has been modified so that when searching for applicants who applied for a specific vacancy, the system will include applicants who are current LEA employees, whether their application is active or inactive.
- The New Vacancy Notification email has been enhanced. In addition to current and future assignments, the most recent archived assignment for the vacant position is included. Additional information about the position has also been added to the email.
- The 'Rebuild Position Budget Codes' function that did not work correctly when using I.E. 9 has been resolved.
- Links to DPI's Employment & Benefits Manual have been added on the LEA Home Page under the "Employees" menu, and on the Employee Page below the "Licensure Manual" link.
- The sorting issue on the second page (and beyond) of the 'Licensure Data Changes' form has been corrected, so that it is consistent with the sort used on the first page.
  - Licensure Middle Name has also been added to the Name on this form.
- The 'Edit Substitute Profile' form has been modified so that if an employee's current Employment Status Code is an Inactive code, the only codes available for selection are other Inactive codes. This will force LEAs to enter a "Re-employment" staff action for all employees (including Substitutes) when they go from an Inactive to an Active status.
  - Likewise, if an employee's current Employment Status Code is an Active code, the only codes available for selection are other Active codes. This will force LEAs to enter a "Separation" staff action for all employees (including Subs) when they are moving from an Active to an Inactive status.
- The 'Edit Substitute Profile' form has been modified to allow the user to enter a value in the Rate of Pay field with up to 5 digits, including 2 decimals.
- Added employee's Licensure Middle Name on the 'License Data' form.
- The 'AIL' (Verification of Ability to Impact Student Learning) form has been replaced in the Licensure Forms module. (The previous version was out of date.)
- The 'License, Contract & Assignment View' form has been modified so that the "Licensed Employees Only" option now defaults to "No". Previously, it defaulted to "Yes" but that was causing employees who did not have a NC license to be excluded.
  - If you wish to exclude employees who do not have a NC License, set the "Licensed Employees Only" option to "Yes".
- Removed the following Actions from the 'Action Notice Recipients' Configuration Management form. These actions are obsolete since these Staff Actions have been rewritten.
  - DIS: Disability
  - LEV: Leave of Absence
  - RFL: Return from Leave
  - RTR: Retired
  - SAL: Salary Change
  - SEP: Resignation, Termination

- SNP: Suspension without Pay
- SWP: Suspension with Pay

New LEA Web Reports

- A new “Validated Licenses” web report (000130) has been added in this release. This report lists staff that have licenses which have expired but they are employed by the school system. Once a "Validated" license is issued, staff have 3 years to earn 15 CEUs, then will be granted a license with a 5 year renewal cycle.
- Another new Web Report (000131) has been created to allow LEAs to obtain a list of all positions without an assigned Census Category. This list includes positions that were not able to be pre-populated during the rollout of this release. LEAs should assign a Census Category for each position on this report using the “Edit Position” form.
- Another new Web Report (000132) has been created to allow LEAs to obtain a list of all Licensed positions without an assigned Position Evaluation Category. This list includes positions that were not able to be pre-populated during the rollout of this release. LEAs should assign an Evaluation Category for each position on this report using the “Edit Position” form.
- A new Web Report (000133) has been created that shows discrepancies between an employee’s name in HRMS and Licensure, or between HRMS and Payroll. Although the full name is listed on the report, the comparison was made between Last Name, First Name and Middle Initial only.

Changes to existing LEA Web Reports

- The ‘Active Employees with Zero or Multiple Primary Assignments’ web report had the following changes made in this release:
  - Substitutes have been excluded from the option that returns employees with NO primary assignment.
  - A column has been added to the report that indicates whether an employee with NO primary assignment has a non-primary assignment.
  - The “Primary Assignment Count” column has been removed from the report.
  - A new Position “Category” column has been added to the report. Valid values are: L (Licensed), C (Classified), and B (Bus Driver).
    - If this column is blank, it means this employee has no assignments.
    - If an employee has multiple primary assignments, one row will be included on the report for each assignment.
- The CEU Totals Web Report (00007) has been modified to remove the Core_Academic field and replace it with the employee’s Primary Position Description.
- The Employee Race/Ethnicity Web Report (000126) has been modified so that the following selection options now default to being checked “off”:
  - Only Show Employees with No New Race/Ethnic Codes listed OR Hispanic/Latino employees with no other Race/Ethnic codes selected.
  - Only Show Employees with Old Ethnicities that Require Re-identification

V6.3.A (March 2013)

Background information: A new Separation module was deployed in v6.3. The new ‘Create Separation’ form for Retirements originally required entry of both the Separation Effective Date and the Last Day Employed. The Separation Effective Date was intended to record the Termination Date, but in some cases LEAs were interpreting this date to mean different things (some LEAs were entering the Retirement Effective Date into this field).

In order to prevent further confusion over the definition of these dates, one of these two dates is being dropped in this release. Because previously some LEAs entered erroneous values into the field saved as the employee's Termination Date, LEAs may need to make corrections to some of their Separation records. Please read "New Separation Discrepancy LEAWeb Report (900129)" section below for more information about the data cleanup that may be needed in each LEA.

More details about the changes included in LEA Release 6.3.A follow below.

Note: Items highlighted in red require some attention on the part of the LEAs.

Changes to All Separation forms

- Retirement "Benefits Status" field has been removed from all forms in the Separation module. Valid values were "Full" and "Reduced", but collection of this information is not necessary since it can be derived from the Separation Employment Status Code.

Changes to 'Create Separation' and 'Edit Separation' forms

- Prior to this release, the 'Create Separation' and 'Edit Separation' forms required both a Separation Effective Date and Last Day Employed. Beginning with this release, LEAs will only need to enter the Last Day Employed. This will be saved as the employee's Termination Date.
    - Note that when entering a Retirement, the Retirement Date must also be recorded. This is the effective date of the employee's Retirement, which must always be on the first day of the month and must always be at least one day after the Last Day Employed.
- Note that the 'Edit Separation' form temporarily displays both "Last Day Employed" (formerly "Effective Date") and "Orig. Last Day Employed." Orig. Last Day Employed is not editable and will be removed in the next release. Having this information temporarily available should facilitate cleanup of Separations where erroneous dates were entered.

New 'Separation Date Discrepancy' LEA Web Report (900129)

- **Run Web Report 900129 (Separation Date Discrepancy Report) to obtain a list of Separations where the old Separation Effective Date is different from the Last Day Employed.** This report will provide a list of Separation records that may have erroneous dates that need to be corrected. Proceed to the "Edit Separation" form and ensure that the correct value is entered into the "Last Day Employed" field for each Separation listed on the report. This value will be saved as the employee's Termination Date and the End Date of their assignment(s).
    - **It is important to run this report and clean up your erroneous dates as soon as possible.** This web report will be removed, along with the "Orig. Last Day Employed" field on the Edit Separation form, when the LEA 6.3.1 release rolls out.
    - **Please run this report only once**. This will prevent additional Separations without date issues from displaying on the report (if Last Day Employed is modified).

V6.3 (January 2013)

Background information: The old Separation module was developed as part of version 1.0 of the web-based LEA module and was very basic. Consequently, it has been of limited value and lacked the functionality that LEAs need. This release had a two-fold purpose: (1) To provide a more robust

Separation module for LEAs, and (2) To add some additional data fields to capture information needed for Public Records Reporting.

The new Separation module offers many new features that were not available with the old module, including the ability to modify or remove Separations. Each time a Separation is created, modified or cancelled, the system will log historical information about the staff action. A history log will allow users to view the details of each staff action for a Separation, including the "before" and "after" field values resulting from that staff action.

Also being introduced in this release is a new 'Re-employment' form that provides LEAs a way to record a "Re-employment" staff action and clear out an employee's Termination Date if they left the LEA previously but are being rehired. Prior to v6.3, "Re-employment" staff actions were not tracked in HRMS. The capability to edit or remove "Re-employment" staff actions will become available with v6.3.1.

The 'Leave & Suspension Overview' form is being replaced by the 'Staff Action Console' form. The 'Staff Action Console' is the portal for initiating and viewing staff actions for an individual employee. A new 'Staff Action Search' form has also been added in this release that allows authorized users to search and view staff actions for employees across the LEA. Currently, both the Staff Action Console and the Staff Action Search include only Leaves/ Disabilities, Suspensions, Separations and Re-employments. More staff actions will be added in v6.4.

More details about the new features and forms that have been added in LEA Release 6.3 follow below. **Also be sure to read the 'Handling Old Staff Action Separation and Retirement Records' section of the v6.3 Release Notes below.**

Note: Items highlighted in red require some attention on the part of the LEAs.

Important Process Changes

- The 'Edit Substitute Profile' form has been modified so that if a user attempts to change Employment Status from an Inactive to an Active code, and this employee has a past Termination Date, the following error message is displayed and the system prevents the user from saving the change to the Employment Status.
    - "This employee currently has a past Termination Date. Before you can assign them an active Employment Status, you must remove the Termination Date first. To do this, click here to go to the 'Staff Action Console' and then:
        - Perform a 'Create Re-employment' staff action, OR
        - Remove the employee's Separation, if it was entered in error."
- The 'Status and Benefits' staff action form has had similar modifications as the 'Edit Substitute Profile' form in v6.3. Previously, this form allowed Employment Status to be updated (to another active Status) only if it was already an active status, with one exception: If the current Employment Status was "None", the user was able to change it to an active Status. (Also note that the user did not have to select an Active status code in order to save other changes on the form. They were able to leave the Employment Status as "None" in that situation.)
    - This form has been modified so that if the user attempts to change Employment Status from "None" to an active code, and the employee has a past Termination Date, the following error message is displayed and the user is prevented from saving the change to the Employment Status.

- "This employee currently has a past Termination Date. Before you can assign them an active Employment Status Code, you must remove the Termination Date. To do this, **click here to go to the Staff Action Console** and then:
  - Perform a 'Create Re-employment' staff action, OR
  - Remove the employee's Separation if it was entered in error."

- **The old 'Termination Date' form that allowed users to modify or remove an employee's Termination Date has been removed in this release.** Previously, this form was accessed from the "Other" menu on the 'Employee Demographics' form and allowed authorized users to modify or delete an employee's Termination Date. The replacement for those functions is as follows:
  - The "delete" function has been replaced by the 'Re-employment' form in this release. (Creating a re-employment staff action clears out the employee's Termination Date).
  - The ability to modify an employee's Termination Date should be handled using the new 'Edit Separation' form. (Note that as part of the conversion of old Separation records, a Separation record was created whenever a Termination Date was found for an employee.)

Two New User Roles Created

- A new Separation Editor role has been created; this role will have authority for creating, editing, and cancelling Separations. This role will also have authority to record "Re-employment" staff actions. Staff Action Clerks will no longer have access to Separation forms. Because the Separation Editor is a new role, a System Administrator at each LEA will need to log on to the 'Manage Users' form to grant access to the designated Central Office staff member(s) who should have authority to create and manage Separations and Re-employment staff actions.
- A new Separation Viewer role has also been created in this release. The new Separation Viewer role will have "view" permissions only for Separations via the 'Separation Details' form, and for Re-employment staff actions via the "Re-employment Details" form. Although HR Staff Action Officers will continue to have access to Separation forms, **Staff Action Clerks will no longer have access to forms in the Separation module**. Consequently, it will be important that a System Administrator at each LEA log on to the 'Manage Users' form immediately after v6.3 rolls out, and assign these new roles to the appropriate Central Office personnel. Assign the Separation Editor role to staff that should have authority to create, edit, cancel and view Separation and Re-employment staff actions, and assign the Separation Viewer role to staff who should have read-only authority for Separation and Re-employment staff actions.
- Please do not remove Staff Action Clerk rights from any staff who currently has that role, as it may prevent them from accessing other needed Staff Action forms.

Staff Action 'Leave & Suspension – Overview' form replaced by 'Staff Action Console'

- The new Staff Action Console replaces the previous 'Leave & Suspension – Overview' form and includes not only Leaves and Suspensions, but also includes Separations and Re-employment staff actions. Effective with v6.4, more staff actions will be added to this form and it will continue to grow until it becomes the portal for viewing and initiating all staff actions for a selected employee.
- The old "Separation" option, "Retirement" option and "Leaves & Suspensions" option on the Staff Action menu (at the top of the Employee Demographics form) have been combined into a single new "Staff Action Console" option. Selecting this option will direct users to the new 'Staff Action Console' form.
- The following roles have authority to access the 'Staff Action Console' form:
  - System Administrator, Leave Editor, Leave Viewer, HR Staff Action Officer, Suspension Clerk, Separation Editor, Separation Viewer and Staff Action Clerk.

- The ‘Staff Action Console’ form is now the launching point for creating a new Leave/Disability, Suspension, Separation or Re-employment staff action.
  - The “Create Leave” option allows Systems Administrators, HR Staff Action Officers and Leave Editors to launch the ‘Create Leave of Absence/Disability’ form.
  - The “Create Re-employment” option allows Systems Administrators, Separation Editors, HR Staff Action Officers and EmpHires to launch the new ‘Re-employment’ form.
  - The “Create Separation” option allows Systems Administrators, Separation Editors and HR Staff Action Officers to launch the new ‘Create Separation’ form.
  - The “Create Suspension” option allows Systems Administrators and Suspension Clerks to launch the ‘Create Suspension’ form.
- All active, future and archived Leaves & Disabilities, Suspensions, Separations and Re-employments appear in a single grid on this form. Rows in this grid are sorted in descending order by Effective Date, and can be re-sorted by clicking on individual column headings.
  - Contents of the “Type” column serve as a hyperlink to the applicable ‘Details’ form, for users with the following roles:
    - System Administrators, HR Staff Action Officers, Leave Editors and Leave Viewers have available a hyperlink to the ‘Leave Details’ form for Leaves/Disabilities.
    - Systems Administrators, Separation Editors, Separation Viewers, HR Staff Action Officers and EmpHires have available a hyperlink to the ‘Re-employment Details’ form.
    - System Administrators, HR Staff Action Officers, Separation Editors and Separation Viewers have available a hyperlink to the ‘Separation Details’ form.
    - System Administrators, HR Staff Action Officers, and Suspension Clerks have available a hyperlink to the ‘Suspension Details’ form.

New ‘Staff Action Search’ Form

- A new ‘Staff Action Search’ form is being introduced in this release that allows authorized users to search for staff actions across the LEA. For this release, this form includes only Leaves/Disabilities, Suspensions, Separations and Re-employments; but more staff actions will be added in v6.4.
- The new ‘Staff Action Search’ form can be reached using one of the following navigational paths:
  - Employee Page > “Staff Action Search” link
  - LEA Home Page > “Staff Action Search” link
  - Employee Demographics Page > “Staff Action Search” link
- The following roles have permission to access the new ‘Staff Action Search’ form:
  - Systems Administrator, LOA Editor, LOA Viewer, Suspension Clerk, Separation Editor, Separation Viewer, HR Staff Action Officer, Staff Action Clerk, EmpHire, and Finance Officer. These roles have authority to search **all** Staff Action Types available on this form; but only roles with proper authority have the ability to drill down to view details of individual staff actions.
- The following Staff Action types may be searched on this form: Leaves of Absence, Disabilities, Suspensions, Separations, and Re-employments. (In v6.4, additional staff action types will be added.) Multiple Staff Action types may be selected simultaneously.
- The following additional search criteria options are available to narrow the results of your search for staff actions. Multiple search criteria can be selected:
  - Staff Action Sub-Type – values available for selection will depend upon the Staff Action Type selected. *(Note: If multiple Staff Action Types were selected, this field will not be available for selection.)*
  - Status – users can select either “Active”, “Completed” or “Cancelled”.
  - Name/SSN/Employee ID

- Staff Action Date Range – users may enter a "From" and "To" Date Range to find staff actions for a particular date range. (Note: If a "From" date is selected, the "To" date is also required.)
  - If searching for Separations or Re-employments, the system returns records with an Effective Date that falls between the two dates entered (inclusive).
  - If searching for Leaves of Absence, Disabilities or Suspensions, the system returns records that were in effect at any time during the date range specified.
- Site – users may select one Site; if left blank, the system defaults to all Sites. (This is the Site on the Effective Date of the Staff Action rather than the employee's current Site.)

- Search results are returned in a grid that includes Staff Action Type, Effective Date, Anticipated/Actual End Date, Staff Action Status, Site, Name, SSN, and Current Employment Status. For authorized users, the Staff Action Type column serves as a hyperlink to the "Details" form. Search results are sorted by Last Name, First Name and Effective Date, but can be re-sorted by column headings.

Changes to 'Staff Action Workflow Management' form

- In LEA v5.8, the 'Staff Action Workflow Management' form was expanded to include Leave/Disability staff action historical information. In v6.3, the new 'Staff Action Search' form (described above) will make available Leave and Suspension staff action history. The original purpose of the 'Staff Action Workflow Management' form was to show staff action requests, and only Payroll Budget Code requests really qualify as "staff action requests". Therefore, the only Staff Action Request records that are being retained on this form are the Payroll Budget Code Requests.

Creating a New Separation

- The new 'Create Separation' form replaces both the old 'Retirement' form and the 'Resignation/Dismissal/Death in Service' form. Employee Separations of **all** types should be recorded using this form.
  - The old 'Retirement' form and 'Resignation/Dismissal/Death in Service" forms have been removed from the system, since they are no longer needed.
- Use the following navigational path to create a new Separation:
  - Employee Demographics > Staff Actions > Staff Action Console. From the Staff Action Console, Systems Administrators, Separation Editors and HR Staff Action Officers can select the "Create Separation" option to be directed to the 'Create Separation' form.
- When a new Separation is saved, the employee's assignments that start before and end after the Separation Effective Date (including those with no end date) will be set to end on the Separation Effective Date.
- The new 'Create Separation' form contains some of the same information that was included on the old 'Retirement' form and the 'Resignation/Dismissal/Death in Service' form, but it also contains some new information that was not collected prior to this release.
  - Users will be required to select an appropriate Separation Employment Status Code. There are two new Employment Status Codes available for Separations, effective with this release: "Did Not Report" (7A) and "Withdrew Offer of Employment" (7B).
    - The "Withdrew Offer of Employment" option should be used when LEAs withdraw an offer of employment after the New Hire process has been completed. This option can be used even if the employee has actually started employment.
    - The "Did Not Report" option should be used for new employees recently hired who never actually reported to work.

- When creating a new Separation, users will be required to enter a Separation Effective Date/Last Day Worked and Last Day Employed/Resignation Date for all Separation types. A Stop Insurance Date and/or Comments can also be entered.
- A new "Eligible for Rehire?" field has been included on the 'Create Separation' form. If the employee is eligible for rehire, the date they are eligible will be required. If the employee is not eligible for rehire, users are instructed to add the employee to the Do Not Hire List.
- Additional fields will appear on the 'Create Separation' form, depending on the type of Separation that is being created.
  - If the Separation is a Dismissal, then the user will be required to indicate whether the employee was dismissed for disciplinary reasons; if so, then they will also be required to indicate whether the dismissal was authorized by the local Board of Education.
  - If the Separation is a Retirement, users will be required to enter the Retirement Date and select the Retirement Benefits Status (Full or Reduced). Users will also have the opportunity to enter the Total Local Aggregate Service and Total State of NC Service (in years and months).
    - Since ORBIT asks LEAs to verify the number of years of service, having this information in the system will expedite that process. In addition, sometimes LEAs wish to recognize retiring employees or give them a gift, and they need to know specifically the number of years and months of service that the employee has. Therefore, **it is highly recommended that LEAs record this information for Retiring employees**, even though these are not required fields.
  - If the Separation is a Non-Renewal, users will be required to select the reason why the employee is being non-renewed. Users can also indicate whether the employee was notified, the date of notification and who notified the employee.
  - If the Separation is a Resignation in Lieu of Renewal, users will be required to indicate whether this was the result of disciplinary action that had been initiated, and if it was done with the consent of the LEA Superintendent.
  - If the Separation is due to the LEA withdrawing the offer of employment, the user will be required to indicate whether the candidate should be marked Sub-par in HRMS.

Viewing Details of a Separation

- The 'Separation Details' form includes complete information about the selected Separation. It is reached by selecting a specific Separation record displayed on the selected employee's 'Staff Action Console' form. It can also be accessed from the search results grid on the 'Staff Action Search' form. Roles with authority for this form include:
  - Systems Administrator, Separation Editor, Separation Viewer, HR Staff Action Officer
- This form serves as the launching point for editing or removing/cancelling existing Separations.
  - Systems Administrators, Separation Editors, and HR Staff Action Officers have authority to edit and/or remove a Separation.
- This form displays all information about the selected Separation.
- For details about Separation staff actions, see the Staff Action History section at the bottom of the 'Separation Details' form. This grid contains one row for each staff action that has been logged for the Separation.
    - If authorized users wish to see more detailed information about a particular staff action in this grid, they may click on the 'Type' hyperlink to link to the 'Separation Staff Action Details' form. (See 'Separation Staff Action Details' section below for more information.)

New Staff Action Archive Agent

- A new nightly archive agent has been created in this release that runs in the background and archives Separations once the Separation Effective Date has been reached.
- When Separations are entered, their status is initially set to “Active”; but if the effective date is in the past, the Separation will be archived that night. Even if a Separation has a past date, it will **not** be archived immediately after entered. This was designed intentionally, to give users an opportunity to correct a Separation immediately if the Effective Date was entered erroneously. (If past Separations were archived immediately, users would have no opportunity to “undo” the Separation before it became archived.)
- When Separations are archived, if the employee still has an active Leave/Disability or Suspension, the system automatically ends the Leave or Suspension.
- This new nightly agent also archives Re-employment staff actions. Archiving of additional staff actions will likely be added in v6.4.

Modifying a Separation

- Prior to v6.3, LEA users had no way to modify (edit) information entered about Separations. A new ‘Edit Separation’ form has been developed in this release. Current and future Separations are now editable (for authorized Systems Administrators, Separation Editors, and HR Staff Action Officers). Archived Separations are also editable; however, the Effective Date on an archived Separation can be changed only to a date that is in the past (less than today’s date). (This restriction is due to the fact that the Separation has already taken place and the employee has been removed from their assignment(s). Allowing users to change the Effective Date to a current or future date would be effectively reversing the Separation).
    - Tip: If you need to change the Effective Date of an archived Separation to a date in the future, just wait until the new Separation Date has passed and then modify the Effective Date.
- This form is reached by selecting the “Edit Separation” option on the ‘Separation Details’ form.
- Use this form if you need to adjust/correct any of the information previously entered about a Separation. If changing the Employment Status Code, the new Status Code selected must be the same general type of Separation (i.e. Dismissal, Retirement, etc.); if that is not the case, then the old Separation should be removed and a new Separation created.
- If you change the Effective Date of a Separation (including archived Separations), Assignment End Dates that match the Effective Date will also be updated.
- If you edit an archived Separation, the employee’s Employment Status, Termination Date, and Rehire Eligibility Date will be updated ONLY if the employee is Inactive and the Separation edited is the employee’s most recent Separation.

Removing/Cancelling a Separation

- The ‘Remove Separation’ form should be used to cancel a Separation that was entered in error, or in cases where the Separation needs to be cancelled before the employee actually leaves.
- The ‘Remove Separation’ form is reached by selecting the “Remove Separation” option on the ‘Separation Details’ form.
- The “Remove” (or Cancel) function is available to Systems Administrators, Separation Editors and HR Staff Action Officers for active and archived Separations.
- Removing a Separation removes the employee’s Termination Date if the Separation Effective Date matches the Termination Date.

Separation Staff Action Details

- This form allows users to view complete information about Separation Staff Actions performed.
- This form includes a Staff Action Details section at the top of the form. This form also includes "before" and "after" values so that users can see the changes that were made to the Separation record as part of the staff action. Fields that were changed as part of this staff action appear highlighted in yellow.
- A "Print" button is also included on this form. This affords LEAs a convenient mechanism for capturing the staff action made by HR personnel and sending a copy to Payroll. It also allows for printing a copy for the employee's work Site or personnel file.

Creating a New Re-employment Record

- The new 'Re-employment' form provides LEAs a way to record a "Re-employment" staff action and clear out an employee's Termination Date if they left the LEA previously but are being rehired. Prior to v6.3, "Re-employment" staff actions were not tracked in HRMS.
- The new 'Re-employment' form should be used in lieu of the old 'Termination Date' form, which has been removed from HRMS. The old 'Termination Date' form allowed authorized users to modify or remove an employee's Termination Date.
  - The "delete" function on the old 'Termination Date' form has been replaced by the 'Re-employment' form.
  - The ability to modify an employee's Termination Date is now available by using the new 'Edit Separation' form. (Note that during the rollout of v6.3, a Separation record was created for all employees who had a Termination Date in their employee record, even if no Separation staff action history record could be found.)
- Use the following navigational path to create a new Re-employment staff action:
  - Employee Demographics > Staff Actions > Staff Action Console. From the Staff Action Console, Systems Administrators, Separation Editors, HR Staff Action Officers and EmpHires can select the "Re-employment" option to be directed to the 'Re-employment' form.
- When using this new form, users will be required to enter the Effective Date of Re-employment, which must be on or after the employee's Rehire Eligibility Date (if one is on record). For employees who will not be going into an assignment, the system requires that the employee's Employment Status Code be selected on this form.
- Note that when this form is submitted, the employee's Termination Date gets removed, and their Last Hire Date is updated to match the Effective Date of the Re-employment staff action.

Viewing Details of a Re-employment Staff Action

- This form includes complete information about the selected Re-employment. It is reached by selecting a specific Re-employment record displayed on the employee's 'Staff Action Console' form. It can also be accessed from the search results grid on the 'Staff Action Search' form. Roles with authority to view details of Re-employment staff actions include:
  - Systems Administrators, Separation Editors, Separation Viewers, HR Staff Action Officers, and EmpHires.
- In v6.3, there is no functionality available for editing or removing a Re-employment staff action previously created. This functionality is planned for the next release, v6.3.1.
- This form displays all information about the selected Re-employment.
- For details about Re-employment staff actions, see the Staff Action History section at the bottom of this form. This grid contains one row for each staff action history record that has been logged for the Re-employment.

- Note: Until the "edit" and "remove" capabilities are added in v6.3.1, the only information that will be included in the Staff Action History section will be information about when the Re-employment was created.

Handling Old Staff Action Separation and Retirement Records

- Effective with v6.3, a new data model is being used for storing Separation records. Old Separation records and Retirement records that were created prior to v6.3 will continue to reside in the old table.
- Old Separation and Retirement records created prior to v6.3 have also been converted (as part of the v6.3 rollout process) to the new Separation table as part of the implementation process, so that they will be included on the 'Staff Action Console' form and the 'Staff Action Search' form. The following rules were used for converting old Separation and Retirement records:
  - If multiple Separation or Retirement records were found for an employee with the same Effective Date, Separation Employment Status, and Staff Action Code ("SEP" or "RTR"), duplicate records were dropped.
  - All non-duplicate Separation and Retirement records were converted to the new data model. A note has been included in the Comments field if any issues were encountered during the conversion process. (If multiple issues were encountered, the comment should reflect the most critical issue.)
    - Below is an explanation of possible error messages that may appear in the Comments field of Separation and Retirement records that were converted as part of the v6.3 rollout.
      - **Separation Effective Date does not match Employee's Termination Date** – This error message means that a future Separation was found for an active employee, but the Separation Date did not match the employee's Termination Date (or the Termination Date was missing).
      - **Separation for Employee w/Inactive Employment Status** – This error message means that a future Separation was found for an employee who had an inactive current Employment Status Code.
      - **Separation Employment Status is an Active or Invalid Employment Status** – This error message means that a Separation record existed for the employee, but the Separation Employment Status was an active or an invalid Employment Status code.
      - Most Separation and Retirement records converted during this process include a **"Converted from old Separation record in v6.3 Rollout"** message in the Comments field, that can be seen when users view the details of the Separation.
      - In some cases, no old Separation or Retirement staff action record was found for an employee, but a Separation record was created in the new data model based on the employee's Termination Date and Employment Status. Those records include a **"Created in v6.3 rollout based on Employee's Termination Date & Employment Status"** message in the Comments field.
        - If the Separation record created during the conversion was for an active employee, the Separation Employment Status Code was set to "98" (Inactive).
        - If the Separation record created during the conversion was for an inactive employee, the Separation Employment Status Code was set to the value in the employee's current Employment Status Code.
    - If the Separation Effective Date was set to a value that was prior to the conversion date, the Separation status was set to "Archived"; otherwise, the Separation status was set to "Active".
  - LEAs should run new web report 000129 (Separation and Employee Termination Date Errors) and review the results to ensure that their new Separation records were converted properly.

See "New Separation and Employee Termination Date Errors (000129)" below for more details.

New Separation and Employee Termination Date Errors Web Report (000129)

- Web Report 000129 displays new Separation records that were converted during the v6.3 rollout but contain errors. Systems Administrators, Separation Editors, and HR Staff Action Officers have the authority to run this report. As Separation records with error conditions are "cleaned up", they will disappear from the report.
- Note about editing Separations that were created during the rollout of v6.3: In cases where there was not enough information in the old staff action history record to populate all the fields in the new Separation record, the missing fields had to be left blank. **If one of these converted Separations is edited, the system will require the user to enter information that was not required when the Separation was originally created.** If you want to avoid having to enter information about old Separations that was not required prior to v6.3, it is recommended that LEAs not edit those old converted Separations unless absolutely necessary.
- There are 3 report options available:
    - Option 1 – Errors for Future Separations & Termination Dates
    - Option 2 – Employees with Multiple Separations (within Specified Timeframe)
    - Option 3 – Errors for Past Separations & Termination Dates
  - Option 1 will return all converted future Separations that have error conditions.
    - One error condition that can appear on this report involves future Separations for active employees, where the Termination Date in the employee record does not match the Effective Date of this future separation.
      - If the Separation Effective Date is incorrect, proceed to the 'Edit Separation' form and update the Effective Date to the correct date.
      - If the Separation Effective Date is correct, proceed to the 'Edit Separation' form and "save" the Separation with the existing Effective Date. Saving this form will reset the employee's Termination Date to match the Separation Effective Date.
    - The other error condition that can appear on this report involves future Separations for employees with an inactive Employment Status.
      - Review the Separation (using the 'Separation Details' form) to verify that it is correct, or cancel the Separation (using the 'Cancel Separation' form) if the staff action was created in error.
  - Option 2 will return converted Separations where there are multiple Separation records for an employee with Effective Dates that are close together (within the number of days specified by the user; default is 90 days). In such cases, it is likely that only one of these Separation records should be retained.
    - Enter the number of days for the desired time frame to search for multiple separations for one employee (default is 90 days).
    - Review the Separation records for this employee, and remove any extraneous Separation(s) using the 'Cancel Separation' form.
  - Option 3 will return all converted past Separations that have error conditions.
    - One error condition that can appear on this report is for past Separations that have an active or invalid Employment Status. Separation records should always carry an inactive Employment Status.
      - The Employment Status on these Separations are either active or are an Employment Status that is no longer valid. You may wish to keep this Separation record for historical purposes; but in the future, Separations can be created only if the Employment Status is being changed to an inactive code.

- The second condition that can appear on this report is for employees with an inactive Employment Status and a missing Termination Date.
  - If this employee is still actively employed, proceed to the ‘Edit Substitute Profile’ form and update the employee’s Employment Status to the correct value. To enter a Termination Date for this employee, proceed to the ‘Create Separation’ form and create a Separation with the Effective Date that should be saved as the Termination Date.
- The third error condition that can appear on this report is for Separations for active employees (excluding Substitutes) with a past Termination Date.
  - If this is employee is actively employed and you wish to remove their Termination Date, proceed to the ‘Remove Separation’ form to remove the Separation. If the employee should have an inactive Employment Status, proceed to the ‘Create Separation’ form and create a Separation for the employee.

Handling Old Staff Action Rehire Records

- From the team’s research, it was determined that although there is a “REH” (Rehire) staff action code in the old table, nowhere in the system is a “REH” record ever actually written. We are aware, however, that at least one LEA (Alamance Co.) is recording “Rehire” staff actions by using a Job Action Code “11”. Other LEAs may be doing the same thing, so the team created a routine that will convert old Job Action Code 11’s to new Re-employment records in the new data model. This routine was **not** automatically run during the v6.3 rollout. LEAs will need to contact Steve Andrew, DPI HRMS support analyst, if they are recording Rehires with a Job Action Code and wish to have these records converted to “Re-employment” records in the new data model.

Changes to New Hire Process

- When using the New Hire with Vacancy Permit process, if the user selects an employee on the ‘Search New Hire Nominees’ form who is a current or former employee, then the user receives an error message stating that the nominee is a current or former employee. The user must then select ‘Add Assignment’, ‘Transfer’ or ‘Cancel’ to proceed.
  - In v6.3, this form has been modified to include an additional button for “Re-employment”, in addition to the 3 buttons listed above. This new button directs the user to the new ‘Re-employment’ form. The message displayed has been modified to read as follows:
    - “The nominee is a current or former employee. If this employee is being re-employed, click ‘Re-employment’. Otherwise, click ‘Add Assignment’ or ‘Transfer’ to assign the employee to the position, or ‘Cancel’ to cancel the request.
- When using the New Hire without Vacancy Permit process, if the user enters the SSN of a current or former employee on the ‘Hire New Employee’ form, then a form is displayed with an error message stating that this person is already an employee and a “Click here to return” button.
  - In v6.3, this form has been modified to include an additional button for “Re-employment’ that directs the user to the new ‘Re-employment’ form. The message displayed has also been modified to read as follows:
    - “Employee Name, SSN, is a current or former employee. If this employee is being re-employed, click ‘Re-employment’. Otherwise, click ‘Return to Hire New Employee form”.

Miscellaneous Bug Fixes & Enhancements:

- Modified the ‘Employee Demographics’ page to provide access to view Separation comments for employees who have worked previously in your LEA. When an LEA is rehiring a previous employee, it is important for staff responsible for hiring to know if there was a derogatory comment logged when the employee left previously. All users with access to the 'Employee Demographics' form also have access to any Separation comments. If there are Separation comments logged for this employee, a "Separation comments have been entered for this employee" link will appear in the upper right-hand corner of the form (immediately below the "Comments have been entered for this employee" link). Clicking on this link will direct the user to the 'Comments' form, where the Separation comments appear immediately below the Employee comments.

- The 'Employee Demographics' form has also been modified to display the following messages (if applicable for an employee), immediately below the Substitute Indicator field:
  - "Not Eligible for Rehire" is displayed if an employee is on the Do Not Hire List.
  - "Eligible for Rehire" + the Rehire Eligibility Date is displayed if the employee has a Rehire Eligibility Date in their employee record.
- A few minor tweaks have been made to the Leave and Suspension forms:
  - The 'Create Leave', 'Edit Leave', 'Extend Leave' and 'End Leave' forms have had the following new validation added when the form is submitted:
    - If this employee has an active Separation record, an error message is displayed if the Leave Dates overlap the Separation Date.
  - The 'Create Suspension, 'Edit Suspension, 'Extend Suspension' and 'End Suspension' forms have had the following new validation added when the form is submitted:
    - If this employee has an active Separation record, an error message is displayed if the Suspension Dates overlap the Separation Date.
  - The 'End Leave of Absence/Disability' form has been modified as follows:
    - Users already select a Reason for ending the Leave/Disability. If the user chooses the Separation or Retirement option, the system previously directed them to the old 'Separation' form or the 'Retirement' form after the 'End Leave' form was submitted.
      - Since the 'Separation' and 'Retirement' forms have been consolidated into one 'Create Separation' form in v6.3, the 'End Leave/Disability' form now directs users to the new 'Create Separation' form if one of these two Reasons has been selected.
  - The 'End Suspension' form has been modified as follows:
    - Users already select a Reason for ending the Suspension. If the user chooses the Separation or Retirement option, the system previously directed them to the old 'Separation' form or the 'Retirement' form after the 'End Leave' form was submitted.
      - Since the 'Separation' and 'Retirement' forms have been consolidated into one 'Create Separation' form in v6.3, the 'End Suspension' form now directs users to the new 'Create Separation' form if one of these two Reasons has been selected.
- The 'Add Assignment' form has been tweaked such that if the user attempts to add an assignment and the employee already has a Termination Date in their employee record, the system displays a message. In v6.3, this message was revised to read as follows:
    - "This employee currently has a Termination Date of 99/99/9999, therefore only assignments with an End Date before the Termination Date can be added. If you are adding an assignment with no End Date, you must first remove the Termination Date. To do this, click here to go to the 'Staff Action Console' and then:
      - Perform a 'Create Re-employment' staff action, OR
      - Remove the employee's Separation if it was entered in error."
- The process that refreshes Position Budget Codes has been modified in v6.3. Up to this point, the Hours field (for Hourly employees) was being zeroed out when the Position Budget Codes were rebuilt, because the Hours cannot be pulled from Payroll.
    - In order to prevent the loss of Hours data that has been keyed by HR users into the Position Budget Codes, before the Position Budget Codes are deleted and rebuilt, the Hours information is saved to a temporary table. Once the Position Budget Codes have been rebuilt from Payroll, the system retrieves the Hours information from the temporary table

and puts it back into the refreshed Position Budget Code, as long as the Position Number and Budget Code match a record in the temporary table.

- The following new system-defined Employment Status Codes have been added:
  - 7A – Did Not Report
    - This is used in the new Separation module to indicate when a New Hire/Re-employment was recorded in HRMS but the person never reported for work.
  - 7B – Withdrew Offer of Employment
    - This is used in the new Separation module to indicate when a New Hire/Re-employment was recorded in HRMS but the offer was later withdrawn (either before or after the employee reported to work).
  - 78 – Resigned in Lieu of Non-Renewal
  - Note: If your LEA has been using any of these 3 codes as locally defined Employment Status Codes, those will need to be converted to other codes. Contact Steve Andrew if you need assistance with this.

V6.2.2 (May 2012)

Misc. Bug Fixes & Enhancements:

- When finalizing a candidate on the New Hire Summary form, LEAs must select an Employment Status Code before marking the New Hire process as complete. Previously, the form made available only active Employment Status Codes for selection. This form has been modified so that if the candidate's current Employment Status Code is not an active code yet (usually due to the fact that they are a future hire), the system includes the candidate's Current Employment Status Code in the drop-down list of available Employment Status Codes.
- Corrected a bug with HRMS access for users that left one LEA and went to work for another LEA, to prevent them from logging into the new LEA's HRMS system using their old User Id.
- Corrected an issue on the Account Profile form that updated a user's Username or Password when a new value was entered but the 'Change Username?' or 'Change Password?' box was unchecked.
- Corrected a problem that occurred when a user attempted to create an Announcement, and an old inactive Announcement existed for that same position. In this situation, the system was defaulting in values from the old Announcement instead of from the position.
- Corrected an issue that was occurring when using I.E. 9 for the 'Advanced Search' feature of the Search Applications form. Licensure Areas were being displayed in an incorrect sort order, but have been corrected to sort by License Area Description.
- Modified the system to automatically update the 'Full-Time or Part-Time' indicator on an active Announcement or Vacancy Permit, when it has been updated on the 'Edit Position' form. The 'Full-Time or Part-Time' indicator is also no longer editable on the Vacancy Permit form, since it should remain the same as the value on the Position form.
- Modified the Position Management Console so that when the user clicks on "Post to Web" button or the "Hide from Web" button, the timestamp on the vacancy is now updated.
- Added a new "Vacancy Closing Date" field to the Vacancy Announcement form.
- Modified the Vacancy Management Console to stop including Announcements in the search results. When an Announcement was returned in the search, and a user clicked on the "Edit" button, sometimes the system was converting it to a Vacancy Permit without the user's knowledge. This form is intended to display only Vacancy Permits; Announcements can be edited from the Position Management Console.

- Corrected a minor bug in the CEU Posting process that is inadvertently setting Academic and Literacy Credits to 0 in an obscure situation where .1 Academic Credits were awarded and .05 Reading Credits were awarded for a course.
- Modified the "Search by Vacancy" and "Search by Name/SSN' options on the Applicant Search form to include internal applicants who applied for Announcements. Previously, only external applicants who completed an application via the SchoolJobs website were being returned in those searches; internal candidates who applied for Announcements were not visible on the Applicant Search form.

Handling I.E. 9 Issues:

- Some HRMS pages do not function correctly when using I.E. 9. The issue is that sometimes the page does not automatically refresh to display current data. Some examples which have been reported include:
  - When adding a candidate to a Vacancy Permit, the new candidate does not display in the Candidates section.
  - When screening applications, applications that have been released continue to display as Unreleased.
- Modifying one of the Internet Options within the I.E. browser seems to eliminate this issue. To make this change to your browser settings:
  - Select "Tools" → "Internet Options" from the toolbar at the top of the browser window.
  - On the 'General' (default) tab, click the "Settings" button in the 'Browsing history' section.
  - In the 'Temporary Internet Files' box, under the "Check for newer versions of stored pages:" question, select "Every time I visit the webpage".
  - Click "OK" twice to save the changes to your browser settings.

V6.2.1 (April 2012)

Background information: The primary objective of this release was to develop an interface with the Payroll vendors' new web-based systems that provides the same link between HRMS Position numbers and Payroll Budget Codes that is available to LEAs using ISIS or Sartox legacy systems. LEAs that have already migrated to the new ISIS 6 Web solution experienced a significant loss of functionality in HRMS, because the old Payroll legacy tables on the iSeries that were a critical part of this interface were no longer being updated. The features and functions in HRMS that were lost when LEAs migrated to a new Payroll web-based system have been replaced in this release. Current Payroll budget codes for employees in LEAs using web-based Payroll systems can now be viewed in HRMS and used in HRMS reporting. However, ISIS 6 LEAs should be aware that the feature that allows HRMS users to enter the Position Number directly into Payroll files will not function until the next release of ISIS (early May 2012). (For a complete list of features that have been addressed in this release, see the "New Interface for LEAs Using Payroll Web-Based Systems" section below.)

The other major objective of this release was to implement changes needed in HRMS due to CEU policy changes made during 2011 NC legislative session. During that session, the General Assembly reduced the number of renewal credits required for a teacher to renew a Standard Professional 2 license from 15 to 7.5 credits. As a result, the State Board of Education approved policy changes regarding renewal requirements during the November board meeting. The new requirements include 1 renewal credit for literacy, 1 renewal credit in the academic subject area, and 5.5 general credits (not to include years of experience) in each 5-year renewal cycle. Literacy now applies to all K-12 educators, and the intent of the policy includes Student Service Personnel. In addition, experience credit is not allowable for the 7.5

CEU's required for renewing an SP2 license. Specific updates made to HRMS as a result of these policy changes are described in the "CEU Module Changes" section below.

In addition, there are numerous miscellaneous enhancements and bug fixes. The most notable enhancement is the new capability to search Licensed Applicants with up to 3 different License Areas. See below for more details.

Note: Items highlighted in red require some attention on the part of the LEAs.

New Interface for LEAs Using Payroll Web-Based Systems:

- The 'LEA Settings' Configuration Management form has been modified so that LEAs can indicate when they have migrated to a new web-based system. Below is a list of changes made to this form in this release:
  - Salary Schedule Library Name and Budget Code Library name were moved down into the 'Payroll Information' section of the form, so all Payroll-related fields now reside in one section.
  - The "Payroll System in Use" field has been modified to include the following options:
    - ISIS Legacy (previously labeled "ISIS")
    - ISIS Web (new option)
    - Sartox
      - *Note that for ISIS 6 LEAs, this option should be set to "ISIS Web". When an LEA migrates to ISIS 6, there are background processes that run to import Payroll data into HRMS to enable the interface to work properly. Those processes will be completed by the morning following the actual conversion.*
      - *Note also that as soon as Sartox makes their new K12 Enterprise web-based system available, a new "Sartox Web" option will be added to this list.*
  - The following fields in the "Payroll Information" section will be hidden if the Payroll System in Use selected is "ISIS Web", since the old (circa 2002) Payroll Interface has not been modified to accommodate the new ISIS 6 web system.
    - HRMS to Payroll
    - Payroll to HRMS
    - Scope of Information to Send to Payroll
    - Salary Schedule Library Name
    - Budget Code Library Name
- New vendor neutral Payroll/HRMS interface tables have been created on the iSeries to be used with the new ISIS and Sartox Web-based systems.
- Specific features in HRMS that have been modified to read the new interface tables when LEAs migrate to a web-based Payroll system include the following:
  - Salary Schedules, Grades and Steps in the drop-down lists for HRMS positions and assignments will now read from current Salary Schedule tables in the new web-based Payroll system.
  - The capability to "map" (link) current employee assignments to the matching budget codes in Payroll, by storing the employee's HRMS position number in the payroll assignment record, is now available for LEAs using web-based Payroll systems. This mapping is accomplished by having Payroll staff enter the HRMS Position Number into the Payroll system, or by having HRMS users enter the Position Number into the 'Payroll Position Number Update' form or the 'Edit Assignment' form. Having the HRMS position number stored in each employee's payroll assignment record enables HRMS users to view the actual, up-to-date payroll budget codes associated with the employee's assignment(s).

    - **Note that the capability for HRMS users to send an HRMS Position Number to Payroll by entering the Position Number into the 'Payroll Position Number Update' form or the 'Edit Assignment' form will not function for ISIS 6 LEAs until the May 2012 release for ISIS 6 is implemented.**
  - Available Budget Codes shown on various Position & Assignment forms within HRMS will now contain up-to-date codes from the LEA's GL Chart of Accounts.
  - The 'Mass Update SSN Name from Payroll' page has been modified to read up-to-date Names from the new ISIS and Sartox Web-based Payroll systems. ISIS Web LEAs should note, however, that since ISIS 6 includes only Middle Initial (not Middle Name), running this mass update will result in the loss of full Middle Names in HRMS.
  - The following reports will now use accurate, up-to-date Payroll budget codes:
    - SS-200 Reports
    - SS-300 Reports
    - NCLB Licensed Qualifications Report
    - Professional Development Report
    - Teacher Turnover Report
    - BT Status Report
- Salary Schedule, Grade and Step fields on the following forms have been lengthened to accommodate up to 10 characters per field, to be compatible with the increased field length in the new ISIS Web system.
  - New Position, Edit Position, View Position
  - Create Vacancy Permit, Edit Vacancy Permit
  - Add Assignment, Edit Assignment
  - View Employee Assignment Details
  - License, Assignment and Contract Information
  - Budget Code Request Details

Enhancements to Applicant Search Form:

- The 'Licensed Applicants' section on the Search Applicants (Advanced Search) page has been enhanced. Users may now search for licensed applicants with up to 3 different License Areas.
  - Users may also use a new "NC License Areas Only" check box to indicate whether only verified NC License Areas (from DPI's Licensure database) should be searched, or if the search should also include applicant-reported License Areas.
- Helpful hints for using the revised Licensed Applicants Search section:
  - If you wish to search for applicants who have one specific License Area, select that License Area in the "Licensure Area #1" box and leave the "Licensure Area #2" and "Licensure Area #3" boxes blank.
  - Checking the "HQ Only" checkbox beside a Licensure Area will return only HQ License Areas. Leaving this checkbox blank will return both HQ and Non-HQ License Areas.
  - If you select one or more Licensure Areas and also enter values for "Min. Years of Exp." and/or "Min. Degree", this search criteria will be applied to ALL Licensure Areas selected. For example, if you select 2 Licensure Areas and enter 5 minimum years of experience and select a Minimum Degree of "Bachelors", then the search will return all Licensed applicants who have both selected Licensure Areas AND 5 years of experience in both Licensure Areas AND a minimum of a Bachelor's degree in both Licensure Areas.
  - If Minimum Years and/or Min. Degree are entered but no License Areas are selected, then the system will return a list of applicants that have the minimum years of experience in ANY area and/or have the minimum degree level in ANY area.

- Note: If "NC License Areas Only" check box is checked, applicants with a Revoked license will NOT be included in the results. However, if this box is not checked, self-reported licenses, which could include revoked licenses, will be included in the results.

CEU Module Changes:

- Field labels for "Reading Methods Credits" have been re-labeled as "Literacy Credits" on all forms in the CEU module. The new label is intended to include both Reading Methods Credits and Literacy Credits.
- As you may remember, HRMS does not allow Reading Methods and Academic Credits to be awarded for the same course. Because the Reading Methods (Literacy) credit requirement was reduced from 3 credits to 1, the logic that splits Reading Methods and Academic Credits when LEAs assign both types of credit for the same course has been modified as follows:
    - If an employee has less than 1 Literacy Credit, the credit assigned for that course will be awarded to the employee's Literacy Credit until it reaches 1, then any remaining balance is carried over to the employee's Academic Credits balance.
    - If the employee already has at least 1 Literacy credit, then the credit assigned for the course is awarded to the employee's Academic Credit.
    - *Note that changes made in this release to the calculation of Literacy/Reading Credits and Academic Credits (when the same number of credits is assigned for the same course) will **not** adjust any credits received for courses posted to HRMS before changes were made in this release.*
- The CEU Experience Renewal Credit Bump has been removed from the LEA module. It will no longer be run as part of your year-end activities, since teachers can no longer receive CEU credit for the year of experience.

Miscellaneous Bug Fixes & Enhancements:

- Modified the Licensure Data Changes page to sort by Date first (newest to oldest), then SSN. All Licensure data changes made for a specific employee on the same day will be displayed together for easier viewing. Timestamp has also been removed from each detail line on the form.
- Modified all versions of the Employee Demographics forms to include a new question after the Zip Code field: "Is the Employee's above Address protected under the NC Address Confidentiality Program?". This is needed because of an obscure law passed by the NC Legislature in 2005 (G.S. 15C-3 & 15C-8) for the purpose of protecting employees who are part of the NC Address Confidentiality Program. This program was established to protect the confidentiality of the address of a relocated victim of domestic violence, sexual offense, or stalking, to prevent the victim's assailants or potential assailants from finding the victim through public records.
    - Important: If your LEA has any custom public records-related reports that print employee addresses, they need to be modified to check this new field before printing the employee's address. (Don't print the employee's address if emp_addr_confidentiality_pgm = "1").
- Modified the New Position, Edit Position and View Position forms to rename the SS-510 indicator to the "Census" indicator. Although the SS-510 report is obsolete, some LEAs wished to retain this indicator for the purpose of collecting data for the E-6 report.
- Modified the Create Position form so that the Title 1 indicator always defaults to "No" (previously it defaulted to "Unspecified").
- Modified Employee Demographics and Employee Hire forms to make the Old Ethnicity field **not required**.

- Note: If your LEA has not already converted your employees to the new Race/Ethnic codes, this needs to be done immediately. In the not-too-distant future, the Old Ethnicity field will be removed from the Employee Demographics forms and the Reporting Tool. It has been removed from the Query Builder, effective with this release. This field should also be removed from any custom reports in your LEA.

- Added an additional Search Value button on the CEU Template Management form (after the "Date" button) to allow searching by Source.
- Corrected the Edit Assignment form so that when a future assignment is added, the system will no longer write a Pending Status Change record if the user did not change the Employment Status Code on the form when the assignment was added.
- Corrected a bug on the Position Management Console so that when the user attempts to create a Vacancy Permit for a position with a "Frozen" Vacancy, they will receive the following error message: "ERROR: There is already an open or frozen vacancy for this position. Adding another one is not allowed."
- Added a link to the Licensure Manual on the LEA Home Page, beneath the Employees → Licensure Forms Management link, and also on the Employee Page beneath the Licensure Forms Management link.
- Modified the License Area/Category Cross Reference form to allow LEAs to select ALL License Areas for assigning to a License Category, not just Teaching License Areas only. This will allow LEAs to map License Categories with associated non-teaching License Areas, for LEAs that opt to assign Academic Credits to Student Services Personnel and/or licensed employees other than Teachers.

V6.2 (May 2011)

Background information: The old Suspension module was developed as part of version 1.0 of the web-based LEA module and was extremely rudimentary. Consequently, it has been of very limited value and many LEAs were not using it at all. This release had a two-fold purpose: (1) To provide a more robust Suspension module for LEAs, and (2) To add some additional data fields to capture information needed for Public Records Reporting.

The new Suspension module offers many new features that were not available with the old module, including the ability to modify or extend Suspensions; and to end them or reinstate the employee, even after the Anticipated End Date has passed. In fact, the new Suspension module is very similar to the new Leave of Absence module. Each time a Suspension is created, modified, extended, ended or cancelled, the system will log historical information about the staff action. A history log will allow users to view the details of each staff action for a Suspension, including the "before" and "after" field values resulting from that staff action.

More details about the new Suspension forms and features that have been added in LEA Release 6.2 follow below. **For LEAs that were using the old (pre-V6.2) Suspension form to track employees on Suspension, be sure to read the 'Handling Old Staff Action Suspension Records' section of the V6.2 Release Notes section.**

Note: Items highlighted in red require some attention on the part of the LEAs.

General Information

- The display of employee SSNs on the top right side of all Suspension forms will initially display as ***-**-****. Users can click on this field to toggle between displaying asterisks only, the last 4 digits of the SSN, or the full SSN.
- Prior to LEA V6.2, once a Suspension had been entered into the system, it was not accessible so LEAs had no way to reinstate the employee or end the Suspension. Because of this limitation, in some cases a Suspension was entered multiple times, resulting in duplicate records on file for the same Suspension.
- The new Suspension module is very similar to the new Leave of Absence module, developed in V5.8. Suspensions will not be "archived" simply because the Anticipated End Date passes; they will remain active (outstanding) until the LEA takes action to reinstate the employee or otherwise end the Suspension.

Three New User Roles Created

- A new Suspension Clerk role has been created; this role will now have authority for creating, editing, ending and extending Suspensions. Staff Action Clerks will no longer have access to the Suspension forms. Because the Suspension Clerk is a new role, a System Administrator at each LEA will need to log on to the 'Manage Users' form to grant access to the designated Central Office staff member(s) who should have authority to create and manage Suspensions.
- New Leave Editor and Leave Viewer roles have also been created in this release. When the new Leave of Absence/Disability module was developed in V5.8, permissions for Leave/Disability staff actions were granted to the Staff Action Clerk and HR Staff Action Officer roles. After receiving requests from several LEAs, a decision was made to create new roles for creating and managing Leaves/Disabilities that are separate from the Staff Action Clerk permissions. The new Leave Editor role will have "Create" and "Edit" permissions for Leaves/Disabilities, but the Leave Viewer will have "View" permissions only. Although HR Staff Action Officers will continue to have access, **Staff Action Clerks will no longer have access to forms in the Leave/Disability module**. Consequently, it will be important that a System Administrator at each LEA log on to the 'Manage Users' form immediately after V6.2 rolls out, and assign these new roles to the appropriate Central Office personnel. Assign the Leave Editor role to staff that should have authority to create, edit and view Leave/Disability records, and grant Leave Viewer rights to staff who should only have authority to view Leave/Disability records.
- Please do not remove Staff Action Clerk rights from any staff who currently has that role, as it may prevent them from accessing other needed Staff Action forms.

Leave of Absence/Disability Overview Form

- In V5.8, a new 'Leave of Absence/Disability – Overview' form was created to display summary information for the employee's Active, Future, and Archived Leaves/Disabilities. It also serves as the launching point for creating a new Leave/Disability for the employee. In this release, this form has been renamed to 'Leave of Absence/Disability/Suspension – Overview' form and includes not only the employee's Leave/Disability staff actions, but also their Suspensions.
- The "Leave of Absence" and the "Suspension" options available on the Staff Action menu at the top of the Employee Demographics form have been combined into a single new "Leaves & Suspensions" option.
- The following roles have authority to access the 'Leave of Absence/Disability/Suspension – Overview' form:
    - System Administrator, Leave Editor, Leave Viewer, HR Staff Action Officer, Suspension Clerk

- The 'Leave of Absence/Disability/Suspension – Overview' form is also the launching point for creating a new Leave/Disability or Suspension record.
  - The "Create Leave" button on this form will be visible to all users of this form except Suspension Clerks and Leave Viewers. It allows authorized users to launch the 'Create Leave of Absence/Disability' form.
  - The "Create Suspension" button on this form will be visible only to Systems Administrators and Suspension Clerks, and will launch them to the 'Create Suspension' form. Other users of this form do not have authority to create Suspensions.
- Separate grids appear on this form for existing Active, Future and Archived Leaves, Disabilities and Suspensions.
  - Leaves and Suspensions are considered Active if they have not yet been ended nor has the employee been reinstated.
  - Future Leaves and Suspensions are those that are active but have an Effective (Start) Date that is after today's date (i.e., the Leave or Suspension has not yet begun).
  - Archived Leaves and Suspensions include all those that are no longer active, either because the employee has been reinstated or the Leave or Suspension has been cancelled, converted or ended.
  - Within each grid (Active, Future and Archived), contents of the Type field serve as a hyperlink to the 'Leave Details' or 'Suspension Details' form, with these exceptions:
    - Suspension Clerks will not have a hyperlink to the 'Leave Details' form for Leaves/Disabilities.
    - Leave Editors and Leave Viewers will not have a hyperlink to the 'Suspension Details' form for Suspensions.

Creating a New Suspension

- Use the following navigational path to create a new Suspension:
  - Employee Demographics > Staff Actions > Leaves & Suspensions. The 'Leave of Absence/ Disability/Suspension – Overview' form will be displayed, where Suspension Clerks and Systems Administrators can click the 'Create Suspension' button to be directed to the 'Create Suspension' form.
- The 'Create Suspension' form is very similar to the 'Create Leave of Absence/Disability' form. But it includes two additional questions: (1) Was this action taken for Disciplinary Reasons? and (2) Was this action voted on by the local Board of Education?
  - This information is required as part of the new Public Records Law (G.S. 115C-320), which became effective 10/1/2010. Question 2 is not required if the answer to Question 1 was "No".
- The system will allow users to create only one Suspension at a time for an employee. Additionally, the system allows up to one "current/active" Leave/Disability and one future Leave/Disability for an employee at a time. The system will not, however, allow any overlap in dates between an employee's Leave(s) and their Suspension.

Viewing Details of a Suspension

- This form includes complete information about the selected Suspension. It is reached by selecting a specific Suspension record displayed on the employee's ''Leave of Absence/Disability/ Suspension – Overview' form. Roles with authority for this form include:
  - Systems Administrator, Suspension Clerk, HR Staff Action Officer
- This form serves as the launching point for performing all staff actions for Suspensions that have already been created.
    - If this is an Active (current) Suspension, the following staff actions are available. Actions are available to all authorized users of this form, except where noted:

        - Overview
        - Edit (Suspension Clerks and Systems Administrators only)
        - Extend (Suspension Clerks and Systems Administrators only)
        - Remove (Suspension Clerks and Systems Administrators only)
        - End (Suspension Clerks and Systems Administrators only)
    - If this is a Future Leave, the following staff actions are available:
        - Overview
        - Edit (Suspension Clerks and Systems Administrators only)
        - Remove (Suspension Clerks and Systems Administrators only)
    - If this is an Archived Leave, the following staff actions are available:
        - Overview
- This form will display all information about the selected Suspension. Note, however, that Comments will be visible only to Suspension Clerks and Systems Administrators.
    - A "Show/Hide" link is available on the Comments field, so that authorized users may toggle between including/not including Comments when printing a copy of this form.
- For details about Suspension staff actions, see the Staff Action History section at the bottom of this form. This grid contains one row for each staff action history record that has been logged for the Suspension. (A history record is logged each time a Suspension is created, modified, extended, ended or cancelled.)
    - If authorized users wish to see more detailed information about a particular staff action in this grid, they may click on the 'Type' hyperlink to link to the 'Suspension Staff Action Details' form. (See 'Suspension Staff Action Details' below for more information.)

Modifying a Suspension

- Prior to V6.2, LEA users had no way to modify (edit) information entered for Suspensions. A new 'Edit Suspension' form has been developed in this release. Current and future Suspensions are now editable (for authorized Systems Administrators and Suspension Clerks) but Archived Suspensions are not. The ability to modify Archived Suspensions may be added in a future release.
- This form is reached by selecting the "Edit" button on the 'Suspension Details' form.
- Use this form if you need to adjust/correct any of the information previously entered about a Suspension.

Extending a Suspension

- System Administrators and Suspension Clerks have the ability to extend a current Suspension by clicking on the "Extend" button on the 'Suspension Details' form.
- The purpose of the "Extend" feature is to allow LEAs to revise the Anticipated End Date on a current/active Suspension when the Suspension turns out to be longer than originally anticipated. This form is intended for use only when the extension period does not involve a different Employment Status Code and/or Suspension Type.
    - If the extension period is for a different type of Suspension, then the 'Extend Suspension' form should not be used. Instead, the current Suspension should be ended and a new Suspension should be created for the extension period.
- If a future Suspension needs to be extended, the adjustment should be made on the 'Edit Suspension' form.

Ending a Suspension

- The ‘End Suspension’ form is used to reinstate an employee on Suspension, or to end the Suspension for another reason. This form is reached by selecting the “End” button on the ‘Suspension Details’ form.
- Current Suspensions are the only Suspensions that can be ended; future or archived Suspensions cannot be ended. Note that Suspensions that are still active but the Anticipated End Date has passed can also be ended; they will remain in an active state until they are ended by the LEA.
- Systems Administrators and Suspension Clerks will need to select the reason for ending the Suspension on the ‘End Suspension’ form. Valid reasons for ending the Suspension are as follows:
  - Employee is Returning to Work
  - Suspension Type is Changing
  - Separation
  - Retirement
  - Leave of Absence/Disability

Removing/Cancelling a Suspension

- The ‘Remove Suspension’ form should be used to cancel a Suspension that was entered in error, or in cases where the Suspension was cancelled before the employee actually left.
- The ‘Remove Suspension’ form is reached by selecting the “Remove” button on the ‘Suspension Details’ form.
- The “Remove” (or Cancel) function is available to Systems Administrators and Suspension Clerks for current and future Suspensions only; archived Suspensions cannot be removed.

Change to Staff Action Workflow Management Console

- In V5.8, this form was expanded to include Leave/Disability staff action historical information. In this release, Suspension staff actions have been added. To display Suspension staff actions, select “Suspensions” for the Staff Action Type in the Search Criteria section of the form.
- The following roles have access to the Staff Action Workflow Management form:
  - Systems Administrator, Suspension Clerk, Leave Editor, Leave Viewer, Staff Action Clerk, HR Staff Action Officer, Finance Officer.
- Not all authorized users of this form have authority to drill down to view the details of all Staff Actions. If a user attempts to view details for a Staff Action that they do not have authority for, the system will display a “Not Authorized to View This Form” message.

Suspension Staff Action Details

- This form allows authorized users to view complete information about Suspension Staff Actions performed. Authorized users of this form are:
  - Systems Administrator, Suspension Clerk, HR Staff Action Officer.
- This form includes a Staff Action Details section at the top of the form. This provides the user more information about this particular Suspension staff action.
- This form also includes “before” and “after” values so that users can see the changes that were made to the Suspension record as part of the staff action. Fields that were changed are highlighted in yellow.
  - Note that Comments are visible only to Systems Administrators and Suspension Clerks.

- A Print button is also included on this form. This affords LEAs a very convenient mechanism for capturing the staff action made by HR personnel and sending a copy to Payroll. It also allows for printing a copy for the employee's work Site or personnel file.

Logging of Employment Status Code Changes

- A decision has recently been made to begin tracking history every time an employee's Employment Status Code changes. Effective with this release, the system will begin logging a history record when Employment Status Code is changed within the Leave of Absence/Disability module and the Suspension module. Eventually, every form in HRMS where Employment Status Code can be changed will be modified to begin tracking these changes.

Enhanced Web Report 000025 - Leave of Absence/Disability/Suspension

- In V5.8, Web Report 000025 was created and allows LEAs to print a list of all employees who are currently on Leave of Absence/Disability, who were on Leave during a specified date range, or who are currently on Leave but their Anticipated End Date has passed. (Note that Leaves & Disabilities created prior to the rollout of V5.8 are not included unless the LEA re-keyed them into the new Leave of Absence module.)
- In V6.2, this report has been enhanced with an option to include Suspension records on the report. Users can specify whether they wish to include Leaves of Absence/Disability only, Suspensions only, or Leaves of Absence/Disability AND Suspensions. The same 3 Report options remain available:
    - Report Option 1 allows LEAs to display a list of all employees currently on Leave/Disability/Suspension (where Status is "Active" and the Effective Date is less than or equal to today's date).
    - Report Option 2 allows LEAs to display a list of employees currently on Leave/Disability/ Suspension but the Anticipated End Date has passed. Run this report frequently to identify the outstanding Leaves/Disabilities/Suspensions that may need some type of action taken on them.
    - Report Option 3 allows LEAs to display a list of employees who were on Leave/Disability/Suspension during a specified date range that is entered by the user.

Handling Old Staff Action Suspension Records

- Effective with this release, a new data model is being used for storing Suspension records. Old Suspension records that were created prior to V6.2 will continue to reside in the old table.
- Old Suspension records created prior to V6.2 have also been converted to the new Suspension table as part of the implementation process, so that they will be visible in the Archived grid on the 'Leave of Absence/Disability/Suspension – Overview' form. These old Suspension records were never ended or cancelled because HRMS provided no mechanism (prior to V6.2) for that. But rather than automatically setting the Status of each converted Suspension record to "active", the following rules were used for populating this field:
    - If multiple Suspension records were found for an employee with the same Start Date and same Staff Action Code (Suspended w/Pay or Suspended without Pay), then only the record with the most recent Create Date was converted; duplicates were dropped.
    - If the employee's current Employment Status Code was 13 (Suspended with Pay) or 89 (Suspended without Pay) at the time of conversion, the system converted the old Suspension record with an "Active" status.

- Note that if the employee had a Status Code of 13 or 89 but had multiple Suspension records, only the most recent Suspension was converted with an “Active” status; remaining records were converted with an “Archived” status.

- If the employee had a current Employment Status Code other than 13 or 89, the old Suspension record was converted with an “Archived” status.
- Converting many of the Suspension records with an “Archived” status was done as a convenience to the LEAs. If the system had set all converted all old Suspension records to an “active” status, LEAs would have to manually “End” all their old Suspensions, many of which may have actually ended several years ago.
- LEAs should run new web report 000128 (Old Suspension Records) and review the results to ensure that their old Suspension records were converted properly. Records converted with an “Active” status will need to be “Ended” once the Suspension ends. See “Old Staff Action Suspension Web Report (000128)” below for more details.

Old Staff Action Suspension Records Web Report (000128)

- Web Report 000128 displays old Suspension records (from the old staff_action history table) that were created prior to the rollout of the V6.2 release. DPI recommends that LEAs run and review this report to review Suspension records that were converted as part of the V6.2 rollout.
  - Records that were converted with an “Active” status will need to be manually “Ended” using the ‘End Suspension’ form when the employee returns from Suspension.
  - Records that were converted as “Archived” status will need no further action, unless the employee was actually still out on Suspension. In that case, the Suspension will need to be re-keyed in HRMS since archived records cannot be extended. (Note that if a new Suspension is keyed into the system, its dates must not overlap with any old Suspensions for that employee.)
  - If you find any old Suspension records on the report with a “Not Converted” status that do not appear to be duplicate records, please contact the DPI Help Desk for support.

- Alternate ways of running this report are also available. This report can also be used to find all old Suspension records for a particular employee, old records with an Effective Date between a particular date range, or old records with an Anticipated End Date during a particular date range.

Miscellaneous Bug Fixes & Enhancements:

- Budget Code requests were previously duplicated on the Workflow Management Console. This has been resolved.
- Corrected a bug in the Vacancy Permit process. When LEAs begin adding External Candidates to a vacancy, the Vacancy Status is automatically updated to “20” (Adding Candidates). When LEAs begin adding Internal Candidates, the system was not updating the Vacancy Status --- the status was remaining as “Released” until the ranking occurred. This issue has been corrected so that once an LEA attaches a candidate (internal or external) to a vacancy, the status gets updated to “20” (Adding Candidates).
- Corrected Vacation Leave Accrual Rates on the Staff Action ‘Status and Benefits’ form. Effective January 1, 2011, the annual Vacation Leave accrual rates for employees was adjusted by the Office of State Personnel. The new annual Vacation Leave Accrual Rates are as follows:
  - 0-5 years- 14 days (1.17 hours/month)
  - 5-10 years- 17 days (1.42 hours/month)
  - 10-15 years- 20 days (1.67 hours/month)
  - 15-20 years- 23 days (1.92 hours/month)
  - 20-25 years- 26 days (2.15 hours/month)

- Modified the ‘Activate or Inactivate Individual Applications’ to allow searching on Last Name and First Initial, or SSN. Previously, users could search only by Last Name or SSN.
- Added display of employee’s UID on the Employee Self-Service ‘Lookup My CEUs’ form. (Note: This enhancement was released separately on 4/28/2011).
- Web Report 000012 (Applicants Who Applied for Positions Posted on the Web) has been modified to include Position Description.

V6.1 (February 2011)

Applicant Search Form Enhanced:

The Applicant Search form has been redesigned and provides three different types of searching:

- Search by Name/SSN (default option)
  - Allows for searching by SSN, Last Name or Last Name/First Initial
  - Allows user to specify exact search or “fuzzy” search (partial match)
- Advanced Search tab allows the following new search features:
  - For all applicants:
    - Position Choice - can be limited to 1st Choice Only
    - Interests (Coaching, Hobbies)
    - State and Zip Code from applicant’s primary address
  - For Licensed applicants only:
    - Minimum Degree Obtained
    - Minimum Years of Experience
- New Search by Vacancy tab allows searching for candidates who selected a specific vacancy, without going through Edit Vacancy Permit
  - The new online application site makes it much easier for applicants to apply for vacancies. The new Search Applicants feature allows you to find applicants for a specific vacancy when you are not adding candidates to a vacancy permit.
  - To pick a vacancy, enter part of the position number or position description and pick from the drop-down list. Drop-down list includes matching vacancy permits with status < 80, and active announcements.
  - When adding candidates to a vacancy, the Search by Vacancy form will automatically display applicants who applied for that vacancy. Click the Advanced Search button or Search by Name/SSN to switch to the other search options.
- Additional Tips:
  - The Search Applicant form now opens in the SAME window instead of a new window.
  - When searching on a partial SSN, enter LAST few digits now instead of first few digits.
  - Screen Applications, Activate/Inactivate and Mass Update forms have not changed.

Display of Employee UID and Payroll ID for all Employees in HRMS:

- Prior to v6.1, Payroll IDs were displayed in HRMS only for employees with certain Object Codes in their payroll assignment(s). This has been changed so that Payroll IDs will be displayed for all employees in Payroll who have an employee record in HRMS.
- Each employee’s UID has been added to the Employee Demographics form.
- UID also being displayed on Principals page.

Misc. Bug Fixes & Enhancements:

- Expanded Employee Email Address field size on the ‘Employee Demographics’ forms from 50 to 75 characters.

- Expanded LEA Site Name field size from 30 to 100 characters.
- Added ability to disable Sites in HRMS, so that Sites that are no longer active will not be made available for selection within the Applicant module.
- Modified the Payroll Position Number Update function so that only staff with current or future assignments at that site will appear. (Previously, employees who were no longer at the selected site were appearing in the results.)
- Corrected a bug on the Principal's Page that was causing "Annabel Lee" to show up in the 'Info for Selected Employee' box, rather than the actual employee selected, when the Principal selects "Evaluations".
- Removed the 'All Sites' site code added in the LEA 6.0 release, due to the following issues:
  - Many LEAs already had local Site Codes for 'All Sites', 'All Schools', etc.
  - Creates confusion when selecting all sites in search criteria -- users think it will return every site.
  - The option should not be selectable in most cases. It only applies to Substitute and Bus Driver applications and Substitute Profiles.
- Corrected a bug that allowed duplicate Vacancy Permits to be created. (The system was previously allowing the user to click the Submit button multiple times.)
- Corrected a problem on the Position Management console that allowed the 'New Vacancy' button to be enabled for positions that already had an active vacancy, which resulted in duplicate Vacancies being created in some cases.
- Corrected the 'Show Current Web Postings' feature (on the Position Management Console) so that vacancies that no longer appear on the web are not displayed.
- Added the ability to search an employee using their Payroll ID number on the Employee Page and the Employee Picker. Partial searches will work exactly like the SSN partial search works (using the last digits).
- The position term of "School Days Only" was displaying as 8.37 months on the vacancies posted at DPI. This has been corrected and the position term displays as "School Days Only."
- When "Finalizing" a new hire with the Vacancy Permit, the default year for posting on the Board Report was 2007. It has been changed to the current year.

New LEA Web Reports for Populating McRel Software:

- Created a new web report series (000030) that includes all data needed for uploading employees into the McRel Teacher Evaluation system. Separate web reports for Teachers, Principals/Assistant Principals and Administrators are generated.

Changes to current LEA Web Reports:

- Modified Web Report 000007 (CEU Totals) to include Licensed staff who have not yet earned any credits in their current renewal cycle.
- Modified Substitute Error Web Report (000125) to include the following new errors:
  - No Sites selected on substitute profile
  - Non-standard Grade on substitute profile
  - Substitute has no valid phone number in employee record
- Added the following columns to Substitute Error Web Report (000125):
  - Employee Status
  - Substitute Indicator
  - Substitute Type
  - From Grade and To Grade

V6.0 (November 2010)

Change to Continuing Education Class Forms:

- Modified the Assign Continuing Education Class form to include a new column in the grid that includes employees who are eligible to be awarded credit for this course. The new column is labeled 'Status' and shows if this employee has already received credit for another course on this same date. If there is a possible conflict with another course on the same date, users will see the text "Possible Conflict" in this column. The user will have the option to decide whether to include employees with possible conflicts in the update.

Interface with Singularity Document Management System:

- Added an interface with Singularity Document Management system, to allow simple access from HRMS to all files within an employee's Virtual Personnel Record for LEAs that use Singularity.
  - A ""View Documents" link has been made available on the Employee Demographics page under the 'Other' menu option at the top of the form. This link directs users to the Singularity login form. Once logged in, HRMS users will have access to all the virtual personnel records for that employee.

Misc. Bug Fixes & Enhancements:

- Expanded Subject field size on the Substitute Profile form from 10 characters to 40 characters.
- Add Percent Funded and Hours Available fields to the Vacancy Permit table at the LEAs and the Vacancy Table at DPI. This will allow the display of Percent Funded (if salaried) or Hours Available (if hourly) on the vacancy posting at DPI.
- Changed the Internal Job Posting form to display the position description in the "Title" column, rather than the position title. This will provide more specific information to applicants.
- Made a change to update the Vacancy Status Change Date when the Vacancy Permit is edited and the vacancy status is changed. Vacancy Permit Timestamp also now updates when Vacancy Status changes.
- Added 'Date Last Updated' column to the grid that displays vacancies on the Vacancy Management Console.
- The default window size has increased from 800 x 600 to 1024 x 768.

Misc. LEA Changes Needed to Support Technical Upgrade of Applicant Module:

- The Applicant upgrade allows applicants to apply for multiple vacancies at an LEA using the same application. To support this enhancement, a new Application_Vacancy table was created to store corresponding application id's and vacancy id's. The table will be sent to the LEAs on the same schedule as the other Applicant data. However, note that Application_Vacancy is in the HRMSLEA library instead of the HRMSAPP library.
- Previously, an applicant could only apply for one vacancy at an LEA, and this information was stored in the Application_Recepient (sic) table. In V6.0, the existing application/vacancy data was copied to the new Application_Vacancy table.
- Modified the following features to pull data from the new Application_Vacancy table instead of the Application_Recepient table:
  - Web Report 'Applicants Who Applied for Positions Posted on the Web'
  - 'Show candidates who applied for this vacancy'
- The Applicant upgrade allows applicants to view vacancies they have applied to even after the vacancies have closed and are no longer listed in the Job Search. The following changes were made in LEA to accommodate this change:

  - Changed the 'Remove Announcement' function to 'Inactivate Announcement'. Instead of deleting an announcement, this function now sets vac_status_cd to '90' (Inactive).
  - Removed the 'Remove Vacancy' function. The ability to change a vacancy's status to 'Inactive' remains.
- Added a new system Site code called 'All Sites' at all LEAs. This new code is used when applicants select sites on Bus Driver and Substitute applications. This new site code cannot be removed. We will work with LEAs who already have a local 'All Sites' or 'All Schools' Site Code in the near future to avoid duplication on forms where Site is selected.
- Cleaned up duplicate codes in the HRMSAPP.Coach_Hobby table. (In several cases, multiple codes were tied to the same description.)
- The 'Dismissed Teacher List' application was rewritten along with the Applicant system upgrade. A new 'Add Dismissed Teacher' link was added in the left navigation on the Employee Page. Only LEA users with rights to the Dismissed Teacher List can log in to the application.

V5.9 (October 2010)

Change to Position Management Console:

- The Position Management Console window is now set to a specific width and no longer expands to fit the size of the monitor being used. This is in preparation for release 6.0 of HRMS where default window sizes will increase from 800x600 to 1024x768. Therefore the Position Management Console will be wider along with other consoles in release 6.0.

Changes to Evaluation Forms:

- North Carolina has adopted a new Teacher Evaluation Instrument that all LEAs should now be using. This means that the old TPAI Instruments included in the HRMS Evaluation module have become obsolete. The ability to create new FODA or Summative forms has been removed, although the ability to access old evaluations created prior to FY2010-11 has been retained.

Misc. Bug Fixes & Enhancements:

- The License Area/Category Cross Reference page in LEA Configuration has been modified so that the License Areas and License Category column headings are sortable. This will allow Systems Administrators to see which Content Area(s) a particular License Area falls within, and which License Areas make up a particular Content Area.
- The Edit/Conduct Schedule Interview form has been changed such that the entire Position number is displayed rather than just the Site number.
- The Continuing Education Employee History form has been modified to include the employee's Middle Name.
- Up to this point, when users added or transferred an assignment for a current employee, HRMS has not required the Employment Status Code to be updated. Sometimes an Add/Transfer for an existing employee calls for the Employment Status Code to change, but that step is too often missed.
  - When Transferring an existing employee, the system will require the user to confirm that they have reviewed and adjusted (if necessary) the employee's Employment Status Code.
  - Note: No changes were made on the Add Assignment form (if not doing a Transfer).
- On the Employee Assignment Details form, archived assignments are now being sorted by Assignment End Date, with the most recent assignment displayed first.
- When creating a Vacancy Permit, if the position is Temporary and has a Start Date, the Position Available Date in the Vacancy Permit is now being defaulted to the Position Start Date (previously, no value was defaulted in.)

- The New Hire Demographics form and the Add Assignment form (if hiring with Vacancy Permit) now display a warning message if the Original Hire Date entered is more than one year into the future.
- The 'Back' button on the Leave of Absence Configuration Management form has been replaced by a 'Home' button that directs the user back to the LEA Home Page.
- The Payroll Position # Report link has been removed from the Employee Page views menu, since the report has become obsolete.
- 'Term of Employment' has been removed from the New Hire – Employee Benefits form.
- The BT Status drop-down list on the Status and Benefits form previously included an extra invalid entry that was displaying just above the 'Completed' option. This extraneous entry has been removed from the drop-down list.
- The Employee Display form that is available to users who only have the ability to search employees has been modified to include any upcoming Pending Status changes.
- Modified the New Hire Summary form to NOT default the Board Action Month to the current month. Users will be required to select a month now.
- The Substitute Profile form has been modified to accommodate the selection of up to 40 schools.
- The Staff Action of "SSN", which allows for the changing of the SSN, was removing the new Race Ethnicity and Employee Local Use information. This has been resolved.
- For 2010, DPI's Financial Business Section area made a change to the requirements for the SS-300 report. Up to this point, there have been three separate SS-300 reporting categories for Teachers: Teachers (Federally Funded), Teachers (State Funded), and Teachers (Locally Funded). Since LEAs are no longer required to break down their teachers by fund source for SS-300 reporting, the SS-300 categories on the Create and Edit Position forms have been changed to include only one 'Teachers' category. (All positions that previously had one of those three Teachers categories assigned are now showing in the new single 'Teachers' category.)
- DPI's Help Desk email address has recently changed as part of a migration to a new email system. All references to help@dpi.state.nc.us have been changed to hrms.incidents@its.nc.gov.

Changes to Web Reports:

- The New Hire Report (000013) has been modified so that the FEIN number prints before the SEIN number.
- A new Orbit Employee List for Retirees Report (000027) has been added to assist LEAs in the annual process of validating that their current employees are not already receiving retirement benefits from the NC Retirement System. This process came about as a result of HB 642 that requires employers to report all rehired retirees to the Retirement System each month.
    - This new web report produces a list of current employees that the LEA can use to copy and paste into the ORBIT web page to validate that their employees are not currently receiving retirement benefits.
- The Teacher Fund Source Reconciliation Report (000021) has been removed. This is due to the fact that the SS-300 report now includes only one Teachers category, so LEAs do not need to reconcile the fund source teachers are being paid out with the SS-300 category prior to running the SS-300 report.

Query Builder Updates:

- The following tables were removed from Query Builder since no longer applicable. Disability_Type_Dom, Benefit, SchoolYear_dom.
- The following were added to allow for access to Leave of Absence Data. Table - Leave_Of_Absence, Table – Leave_Disability_Dom, Reporting Group – LOA Employee.

New HRMS Online Help:

- New online Help is being developed for HRMS. Topics that have been added to the new online Help are accessible by clicking the ‘Help’ link on each form.

V5.8 (September 2010)

Background information: The old Leave of Absence module was developed as part of version 1.0 of the web-based LEA module and was extremely rudimentary. It has also been problematic and although some improvements have been made along the way, it has remained of very limited value and in many cases,LEAs abandoned the idea of using it. The purpose of this release was to significantly enhance the Leave of Absence module and provide LEAs a more adequate and comprehensive tracking tool for employees on Leave of Absence and Disability.

The new Leave of Absence module offers many new features that were not available with the old module; in fact, it has been completely overhauled. In addition to having the ability to create Leaves of Absence, LEAs will also have the opportunity to modify or extend those Leaves, and end them or reinstate the employee, even after the Anticipated End Date has passed. Complete historical information about Leaves of Absence/Disability will also be available for active, future and archived Leaves that were created after LEA 5.8 is rolled out. Every time a Leave/Disability is created, modified, extended, ended or cancelled, the system will log historical information about that staff action. A complete history log will allow users to view the details of each staff action for a Leave of Absence/Disability, including the “before” and “after” Leave values resulting from that staff action.

More details about the new Leave/Disability forms and features that have been added in LEA Release 5.8 follow below. **For LEAs that were using the old (pre-5.8) Leave of Absence module to track employees on Leave and/or Disability, be sure to read the ‘Handling Old Staff Action Leave of Absence and Disability Records’ section of this document.**

Note: Items highlighted in red require some attention on the part of the LEAs.

General Information

- The display of employee SSNs on the top right side of all Leave/Disability forms has been changed to initially display as ***-**-****. Users can click on this field to toggle between displaying asterisks only, the last 4 digits of the SSN, or the full SSN.
- Prior to LEA 5.8, once the Anticipated End Date passed on a Leave of Absence, it disappeared from view and LEAs had no way to retrieve it and reinstate the employee or end the Leave. This caused many problems; in some cases the Leave was re-entered multiple times, resulting in duplicate records on file for the same Leave of Absence. Effective with LEA 5.8, Leaves will not be “archived” simply because the Anticipated End Date has passed; they will remain active (outstanding) until the LEA takes action to reinstate the employee or otherwise end the Leave.

Leave of Absence and Disability Forms Combined

- The ‘Leave of Absence’ staff action and the ‘Disability’ staff action have been combined into a single Leave of Absence/Disability form. LEA users can distinguish a Leave from a Disability by selecting the appropriate Leave Type when creating the Leave/Disability.
- The old staff action ‘Disability’ form has been removed from the system. The old ‘Disability’ link that was available in the drop-down list of options in the Staff Action Menu at the top of the

Employee Demographics form has also been removed. Please select the ‘Leave of Absence’ link to place a current employee on Leave of Absence/Disability.

Creating a New Leave of Absence/Disability

- Use the following navigational path to create a new Leave of Absence:
    - Employee Demographics > Staff Actions > Leave of Absence.

  The ‘Leaves of Absence/Disability - Overview’ form will then be displayed, where users can click the ‘Create Leave’ button to be directed to the ‘New Leave of Absence/Disability’ form.
- Several data fields on the ‘New Leave of Absence/Disability’ form that were previously required are no longer required:
    - Anticipated End Date
    - Continue Insurance at System Expense?
    - Post on Board Report
    - Should employee be removed from Position?
        - This has been removed altogether. If LEAs wish to remove an employee from their position while on Leave, they will need to use the ‘Edit Assignment’ form.
- Several fields have been added to this form. None of these are required to be filled in.
    - Last Day on Payroll
        - Use this if the employee is using accrued leave to cover all or part of the Leave/Disability
    - Anticipated Employment Status Upon Return
        - This is the Employment Status that the employee is expected to return to when their Leave/Disability ends.
    - Comments
- The system will allow users to create no more than one active/current and one future Leave/Disability at a time. Overlapping dates will not be allowed between the current Leave and the future Leave.

Leaves of Absence/Disability Overview (for Each Employee)

- Once a Leave of Absence/Disability has been created for an employee, it will appear on the employee’s ‘Leave of Absence/Disability – Overview’ form. This form replaces the old ‘Leave’ form and shows summary information for the employee’s Active, Future, and Archived Leaves. It also serves as the launching point for creating a new Leave/Disability for the employee.
- Use the following navigational path to reach the ‘Leaves of Absence/Disability – Overview’ form:
    - Employee Demographics > Staff Actions > Leave of Absence
- An Employee Assignment Information section (shaded in blue) has been added to this form, followed by grids for Active Leaves, Future Leaves, and Archived Leaves.
    - Active Leaves are those that have not yet been ended nor has the employee been reinstated.
    - Future Leaves are those that are active but have an Effective (Start) Date that is after today’s date (i.e., the Leave has not actually started yet).
    - Archived Leaves include all those that are no longer active, either because the employee has been reinstated or the Leave has been cancelled, converted or ended.
- Users may click on the “Type” column for any Leave that they wish to view detailed information for. This links the user to the ‘Leave Details’ form. (See ‘Viewing Details of a Leave/Disability’ below for more information.)

Viewing Details of a Leave of Absence/Disability

- This is a new form that includes complete information about the selected Leave/Disability. This form is reached by selecting a specific Leave record displayed on the employee's ''Leave of Absence/Disability – Overview' form.
- This form serves as the launching point for performing all staff actions for Leaves that have already been created.
    - If this is an Active (current) Leave, the following staff actions are available:
        - Overview
        - Edit
        - Extend
        - Remove
        - End
    - If this is a Future Leave, the following staff actions are available:
        - Overview
        - Edit
        - Remove
    - If this is an Archived Leave, the following staff actions are available:
        - Overview
        - Remove
- For details about Leave/Disability staff actions performed after the implementation of LEA 5.8, see the Staff Action History section at the bottom of the form. This grid contains one row for each staff action history record that has been logged for this Leave/Disability. A history record is logged every time a Leave of Absence/Disability is created, modified, extended, ended or cancelled.
    - If users wish to see more detailed information about a particular staff action in this grid, click on the 'Type' hyperlink to link to the 'Leave of Absence Staff Action Details' form. (See 'Leave of Absence Staff Action Details' below for more information.)
    - Note that this staff action history information will be available only for staff actions performed after LEA 5.8 was rolled out. No staff action history is available on Leaves and Disabilities created prior to the LEA 5.8 rollout.

Modifying a Leave of Absence/Disability

- Prior to LEA 5.8, LEA users had no way to modify (edit) information about Leaves of Absence. A new 'Edit Leave of Absence/Disability' form has been developed; current and future Leaves are now editable but Archived Leaves are not. The ability to modify Archived Leaves is planned for a future release.
- This form is reached by selecting the "Edit" button on the 'Leave Details' form.
- All data fields related to the Leave of Absence can be modified using this form. Use this form if you need to adjust/correct any of the information entered about a Leave of Absence.

Extending a Leave of Absence/Disability

- Authorized users have the ability to extend a current/active Leave of Absence by clicking on the "Extend" button on the 'Leave Details' form.
- The purpose of the "Extend" feature is to allow LEAs to revise the Anticipated End Date on a current/active Leave when the employee needs to be out longer than originally expected. This form is intended for use only when the extension period does not involve a different Employment Status Code and/or Leave Type.
    - If the extension period involves a different Employment Status Code (if it is a different type of Leave), then the 'Extend Leave' form should not be used. Instead, the current

Leave should be ended and a new Leave/Disability should be created for the extension period.

- If a future Leave/Disability needs to be extended, the adjustment should be made on the 'Edit Leave of Absence/Disability' form.

Ending a Leave of Absence/Disability

- The 'End Leave of Absence/Disability' form is used to reinstate an employee on Leave, or to end the Leave for another reason. This form is reached by selecting the "End" button on the 'Leave Details' form.
- Current Leaves are the only Leaves that can be ended; future or archived Leaves cannot be ended.
- Authorized users will select the reason for ending the Leave on the 'End Leave of Absence/Disability' form. Valid reasons for ending the Leave are as follows:
    - Employee is Returning to Work
    - Type of Leave is Changing
    - Separation
    - Retirement
    - Suspension

Removing/Cancelling a Leave of Absence/Disability

- The 'Remove Leave of Absence/Disability' form should be used to cancel a Leave that was entered in error, or in cases where the employee withdrew their Leave request before they actually went out on Leave.
- The 'Remove Leave of Absence/Disability' form is reached by selecting the "Remove" button on the 'Leave Details' form.
- Prior to LEA 5.8, LEA users could cancel only future Leaves. This has been expanded to also allow authorized users to cancel/remove current Leaves. Archived Leaves cannot be removed.

Staff Action Console Renamed to Staff Action Workflow Management Console

- The old Staff Action Console has been renamed to the 'Staff Action Workflow Management' console. Prior to LEA 5.8, the Staff Action Console displayed the requests entered for Adds/Changes/Deletes to Payroll Budget Code Information only. Effective with 5.8, the Staff Action Workflow Management form has been expanded to also include Leave/Disability staff action historical information.
- The link to the Staff Action Workflow Management console is located under the Employees menu on the LEA Home page. It can also be reached from the Consoles menu on the Employee Demographics from.
- The top of the Staff Action Workflow Management form includes a Search Criteria section that allows users to search for Payroll Budget Code Requests or Leave/Disability Staff Actions. Search results are displayed in a grid on the lower half of the form. Authorized users can drill down to view the details of each staff action. (See 'Budget Code Staff Action Request Details' and 'Leave of Absence/Disability Staff Action Details' sections below.)

Budget Code Staff Action Request Details

- This form existed prior to LEA 5.8, but it has been reworked. It allows users to view complete information about Payroll Budget Code Staff Action Requests.
- This form includes a Staff Action Details section at the top of the form. This provides the user more information about this particular budget code request.

- This form also includes “before” and “after” values so that users can see the changes that were requested; fields that are proposed to be changed are now highlighted in yellow.
- A Print button is also included on this form. This affords LEAs a very convenient mechanism for capturing the payroll request change made and sending a copy to Payroll.

Leave of Absence/Disability Staff Action Details

- This is a new form that did not exist prior to LEA 5.8. It allows users to view complete information about Leave/Disability Staff Actions performed.
- This form includes a Staff Action Details section at the top of the form. This provides the user more information about this particular Leave/Disability staff action.
- This form also includes “before” and “after” values so that users can see the changes that were made to the Leave/Disability record as part of the staff action. Fields that were changed are highlighted in yellow.
- A Print button is also included on this form. This affords LEAs a very convenient mechanism for capturing the staff action made by HR personnel and sending a copy to Payroll. It also allows for printing a copy for the employee’s work Site or personnel file.

Leave of Absence/Disability Types Configuration Mgmt

- This form will allow Systems Administrators in each LEA to manage locally-defined Leave of Absence and Disability types. Leave of Absence and Disability types have been combined on the same LEA Configuration Management form; previously they were on separate forms.
- All Disability types are system-defined (as they were prior to LEA 5.8) and can be viewed by Systems Administrators but cannot be modified.
- All Leave of Absence types are locally-defined by each LEA (as they were prior o LEA 5.8) and can be viewed, modified or removed by Systems Administrators using this new form. New Leave of Absence types can also be added if needed.

New Leave of Absence/Disability Web Report (000025)

- Web Report 000025 – Leaves of Absence/Disability has been added as part of the LEA 5.8 release. This report allows LEAs to print a list of all employees who are currently on Leave of Absence/Disability, who were on Leave during a specified date range, or who are currently on Leave but their Anticipated End Date has passed.
- **This report will not include any Leaves/Disabilities that were created prior to the implementation of Release 5.8 unless the LEA re-keyed those Leaves into the new Leave of Absence module after 5.8 rolled out.**
- Report Option 1 allows LEAs to display a list of all employees currently on Leave/Disability (the Status of the Leave is “Active” and the Effective Date of that Leave is less than or equal to today’s date).
    - Report Option 2 allows LEAs to display a list of employees currently on Leave/Disability but the Anticipated End Date of the Leave has passed. Run this report frequently to identify the outstanding Leaves that may need some type of action taken on them
        - Leaves with no Anticipated End Date will be included in this report.
        - LEAs should take action to extend or end Leave(s) on this report as needed, or to reinstate the employees who have returned to work.
- Report Option 3 allows LEAs to display a list of employees who were on Leave/Disability during a specified date range that is entered by the user. This option selects all Leaves with a Start/Effective Date or an Anticipated End Date that falls within the date range entered. Leaves

that have been cancelled/removed are not included in this list. Current, future and archived Leaves can appear on this report, depending on the date range entered.

Handling Old Staff Action Leave of Absence and Disability Records

- HRMS has just moved to a new data model for storing Leave of Absence/Disability records. Old Leave and Disability records that were created prior to Release 5.8 still reside in an old table that will no longer be used. Consequently, LEAs will not have the ability to view online, modify or end old Leaves entered prior to Release 5.8. An effort to convert old historical Leave/Disability data as part of the LEA 5.8 rollout was attempted; but due to the poor quality of the old data, it was not feasible to convert those old Leave/Disability records with any level of accuracy. Instead, the better option is to ask LEAs to re-key old Leaves/Disabilities that were in progress when LEA 5.8 was rolled out. An analysis of LEA data was performed prior to the LEA 5.8 rollout, and it was concluded that LEAs who were using the old Leave module could re-key their outstanding Leaves in a matter of no more than a few hours. Re-keying those outstanding Leaves/Disabilities into the new Leave of Absence module will allow LEAs to modify, end, reinstate, or cancel those Leaves thereafter.
    - The majority of LEAs were not using the old Leave of Absence module (prior to Release 5.8) to enter their Leave and Disability information; for those LEAs, no action is needed.
- To enable LEAs to find the old Leave/Disability records that need to be re-keyed into the new Leave of Absence module, LEA Web Report 000026 (Old Leave/Disability Records) was developed. LEAs who were using the old (pre 5.8) Leave of Absence module and had Leaves and/or Disabilities in progress should run this report and have a Staff Action Clerk re-enter those Leaves. See below for specifics about running this new web report.

Old Staff Action Leave/Disability Records Web Report (000026)

- Web Report 000026 – Old Leave of Absence/Disability Records displays old Leave, Disability and Reinstate records (from the old staff_action history table) that were created prior to the rollout of the LEA 5.8 release. DPI recommends that LEAs run this report to find Leaves/Disabilities that were in progress when LEA 5.8 was rolled out and re-key those Leaves into the new Leave of Absence module.
- The best way to obtain a list of the Leaves and Disabilities that were in progress when release 5.8 was rolled out is to run this report using the Anticipated End Date filter. Use the following steps to find these Leaves and/or Disabilities.
    - Select the 'Filtered By Anticipated End Date' option on the report selection form.
    - From Date: Enter the day that LEA 5.8 was rolled out in your LEA to find all Leaves/Disabilities that were expected to end on or after that Date.
    - To Date: Enter a date in the distant future, to ensure that all old outstanding Leaves that are scheduled to end in the future are included.
    - Submit the report. This will return a list of all Leaves that were in progress (or expected to start in the future) when LEA 5.8 rolled out.
    - Have a Staff Action Clerk in your LEA re-key these records (using the 'Create Leave' option) into the new HRMS Leave of Absence module.
- Alternate ways of running this report are also available. This report can be used to find all old Leave/Disability records for a particular employee, to find all old Leave/Disability records with a Start/Effective Date during a particular date range, or to find **all** old Leave/Disability records for the entire LEA.

Misc. Enhancements:

- Added Site Name to the "Assignment Budget View (Payroll)" Reporting Group in Query Builder.
- Expanded the size of the Email Address on the 'Site Contacts' Configuration Management form from 50 to 75 characters.

V5.7 (April 2010)

Note: Items highlighted in red require some attention on the part of the LEAs.

Changes to Employee Demographics Form:

- Recently, we discovered that when collecting and recording the new federally-mandated Race/Ethnic information in HRMS, at least one Race code must be stored for ALL employees, even those who indicated that they are of Hispanic/Latino ethnicity. If the Employee Demographics form is edited and no new Race codes have been selected, when the form is saved a warning message "Must select at least one Race" will appear. ***Note that web report 000126 (Employee Race/Ethnicity Report) will list active staff with Hispanic/Latino ethnicity and no other Race selected if the option 'Only Show Employees with no New Race/Ethnic Codes listed OR Hispanic/Latino Employees with no other Race/Ethnic Codes selected' is checked.***
- No longer allow the removal of Emergency Contact name if a phone number for the Emergency Contact exists.
- The Emergency Contact section of Employee Demographics was not displaying on the New Hire with Vacancy Permit or New Hire without Vacancy Permit screen. This has been corrected.
- On Employee Demographics, when the Zip Code extension as not entered, the word 'null' was saved in the data (although still seen as blank on the screen). This no longer occurs.

Changes to Edit Substitute Profile Form:

- Modified the Employment Status Codes available in the drop-down box to be a little more flexible, especially for employees who are not assigned to positions. The revised rules for selecting Employment Status Codes are listed below. Generally, the Employment Status Codes available for use will still be the Active codes only. But Active **and** Inactive Employment Status Codes will be available in the drop-down list, in the following situations:
    - If the employee has a current Pending Employment Status Code Type.
    - If the employee has a current active Substitute Employment Status Code, and they do not have a current or future assignment record.
    - If the employee has a current Inactive Employment Status Code, and they do not have a current or future assignment record.
    - If the employee has a current locally-defined Employment Status Code, and they do not have a current or future assignment record.

Changes to Employment Status Codes:

- Two system-defined Employment Status Codes have been disabled. The exception for Teachers' and State Employees' Retirement System (TSERS) retirees who wished to return to work as classroom teachers exempt from the earnings limitations has expired, making these codes obsolete. The two codes that have been removed are:
    - 17 – Retiree Returning FT Outside Earnings Cap
    - 19 – Retiree Return PT Less Than 50% Outside Earnings Cap
- Due to the above change, DPI advises you run the 000019 Report "Employees with Disabled or Invalid Employment Status Codes" to see if you have staff with the '17' or '19' codes. Please update these codes as appropriate.

- The wording on the definition for Employment Status Code 05 has been changed to "Active Permanent Part-Time with Full Benefits". The bullets below should add further clarification regarding the types of employees that this Employment Status Code is intended for:
  - Must participate in TSERS and is eligible for participation in the State Health Plan
  - Work at least 30 hrs. per week but less than 100%
  - Not Eligible for Tenure

Changes to Display of Archived Assignments:

- When clicking on the Position Number in 'Archived Assignments', the current Position information was displayed. This has been corrected and Position information at the time of the archive is now displayed.

Enhancements to Mass Build Contracts Process:

- The 'Build Contracts' form has been modified to include "Tenure Status" in Step 1, as one of the search criteria that can be entered to find employees to build contracts for.
- On Step 5, the list of employees updated was not sorted in any particular order. This has been modified to sort by Last Name, then First Name.
- Corrected a bug that some LEAs were experiencing when selecting by School in Step 1. Occasionally, when it moved to Step 2 the last person in the list had their name blanked out.

Enhancements to Dismissed Teacher Indicator on Applications:

- Modified the display of the Dismissed Teacher Indicator on HRMS forms. Previously, the Dismissed Teacher Indicator was stored in the applicant's record when they submitted their application, but their record was not updated if they were later placed on the Dismissed Teacher List. The following HRMS forms/functions have been modified to check the up-to-date Dismissed Teacher List every time the form is displayed, rather than relying on data that was stored when the applicant submitted their application.
  - Search Applicants
  - Screen Applications
  - Activate/Inactivate Applications
  - Vacancy Candidate Information
  - List Applicants for Vacancy Permit
- Also modified the 'Do Not Hire' list in HRMS to include a third button: Show State Dismissed Teacher List. This button will link the user to the Dismissed Teacher List page, where they can log in to access the list.

Enhancements to Dismissed Teacher List:

- Added Licensure Revocation date to Dismissed Teacher Display.
- Added link to list maintained by the NC SBE of teachers whose licenses have been denied or revoked.

New Web Reports:

- A new web report has been added (000023) that provides a list of previously-assigned CEU courses where Reading Methods Credit + Academic Credit exceed Renewal Credits (or 150% of Semester Hours). This will help you find the employees who received both Reading Methods Credit and Academic Credits for the same course, before the new rules implemented in Release 5.6 were in place. Since Release 5.6 was implemented, the system includes business rules around assigning both Reading Methods Credits and Academic Credits for the same course (see LEA 5.6 Release Notes below for more details.)

- A new web report has been added (000024) that provides a list of CEUs with academic credits entered before Release 5.5. (LEAs may want to review these for accuracy). Release 5.5, ensured that each teacher hold a qualifying License Area when awarded Academic Credit for a course. This validation is done through the assignment of credit through the course template.

Misc. Bug Fixes & Enhancements:

- ‘Employee Self Service’ option removed from Home Page since no longer applicable.
- ‘Admin Apps Manager’ and ‘Admin Apps Viewer’ removed from ‘Applicants” drop down on Home Page since no longer applicable.
- Label of ‘Grad Date’ on Education section of application viewed at the LEA, changed to ‘Graduation/Completion/or Last Course Taken Date’ to match the label on the online application.
- Label of column on the Site Assignment Info. Screen changed from “Classification” to ‘Position Classification” to eliminate confusion with Licensure Classification.
- The removal of some ‘Pending Status Changes’ (by Deletion of Termination Date), was not working for some Status Codes. This has been corrected.
- If a % sign was in the Job Title in Payroll, the HRMS Position Number could not be put on the Payroll Assignment record on the Edit Assignment form. An error occurred. This problem has been corrected.
- Assignments were not archiving if apostrophes were in the Position Description. This problem has been corrected.
- The import of Absences from Payroll (Payroll to HRMS option set to Yes in LEA Settings), was failing if a date coming from Payroll was invalid. For example, 06312009 or 02292009. This problem has been corrected and the absence will just be ignored.
- The font on several screens, (such as View Application), that was changed in release 5.6 has been corrected to make text more legible.

V5.6 (March 2010)

Background information: In late winter/early spring, LEAs embark on a lengthy annual process of reviewing the credentials of non-tenured staff as part of the Renewal/Non-Renewal process. New contracts are generated for all employees who have not yet reached Career status. Up to this point, LEAs who have created their contracts in HRMS have had to create those contracts for each employee individually every year, which is a very tedious and time-consuming process. To improve the efficiency of this process, the HRMS Steering Committee requested that a Mass Build Contract feature be added to HRMS that would allow LEAs to generate large groups of contracts simultaneously. The purpose of this release is to add that new functionality to HRMS. LEAs will now be able to select specific types of contracts for employees with existing contracts in HRMS, and build their new contracts in mass.

In addition, the Steering Committee also requested that a new “Percent Employed” field be added to the Create Contracts and Edit Contracts forms to use for part-time employees, to allow LEAs to track the percentage that an individual is to be employed during the current term of employment. Once entered, the new Percent Employed will be included on the printed part-time contracts, for those LEAs that use the HRMS Reporting Tool to print their contracts.

More details about the new features that have been added in LEA Release 5.6 follow below.

Note: Items highlighted in red require some attention on the part of the LEAs.

New Percent Employed Field on Create Contracts and Edit Contracts Form:

- A new "Percent Employed" has been added to the 'Create Contracts' and 'Edit Contracts' forms for part-time contracts only. This new field is not required on these forms, and will not even be visible unless a part-time contract is being created or edited.
    - Since this is a new data field, each LEA will have to go back and enter the Percents for all their part-time contracts (preferably before using the new 'Mass Build Contracts' feature listed below).
- If a value is entered into the new "Percent Employed" field on a part-time contract, when the contract is printed within the HRMS Reporting Tool, the new Percent Employed value will be printed immediately after the text 'Part-Time' (on the same line) in the upper right hand corner of the printed contract.

New Mass Build Contracts Form:

- A new 'Build Contracts' form has been added to the 'Employee Mass Updates' page in HRMS. The purpose of this form is to allow LEAs to easily generate contracts in large numbers for the new school year, rather than having to create them individually in HRMS. This feature will be available only to HRMS users with the Systems Administrator, Staff Action Clerk or HR Staff Action Officer roles.
    - Note that contracts can be generated in mass only for employees who are assigned to active positions within HRMS, and already have their current contracts entered in HRMS.
    - ***Important: If your LEA has current employees who have more than one active contract, the system will display an error message when you attempt to open the 'Build Contracts' form. The error message will instruct you to run web report 000127 (Employees with Multiple Active Contracts) and remove the extra contracts for these employees. An easy way to clean up the contracts for these employees is to go ahead and individually create their contract for next year; the system will automatically inactivate all their old contracts when the new contract is created. Once you finish cleaning up the contracts for employees on this report, you may return to the 'Build Contracts' form and proceed with running the mass updates.***
- This 'Build Contracts' process can also be used to inactivate current contracts for selected employees, without generating new contracts for them. But be aware that if you run the 'Inactivate Current' option before running the 'Create New' option, you will not be able to select those old contracts when creating new contracts, because they will already have been inactivated. Normally, LEAs should be using the 'Inactivate Current' option only after they have finished creating all their new contracts for the new school year, and need to inactivate any remaining current contracts for employees who are not returning next year.
- The new 'Build Contracts' process is divided into 5 separate steps, as described below.
- Step 1 (Find Employees) allows users to enter selection criteria to find current employees with existing contracts in HRMS that they wish to include in the mass update. Users will select the Contract Type, Site(s), From and To Contract Effective Dates, and Special Conditions to use in the search. The system will return a list of all current employees who are assigned to positions and have active contracts in HRMS, who met the search criteria entered.
- Step 2 (Select Contracts) includes the search results from Step 1. The selection criteria entered in Step 1 is displayed at the top of the page, followed by a list of employees that matched the search criteria entered. All employees displayed will be automatically selected for update; the user will need to unselect any employees that they wish to exclude from the update.

- Step 3 (Setup) displays a list of employees selected for update and requires the user to choose whether they wish to create new contracts for these employees, or if they would rather inactivate their old contracts without creating new contracts for them.
    - Select 'Create New' if you wish to create new contracts for the selected employees (note that the system will automatically inactivate their old contracts when the new contracts are created). The system will then open up the 'Contract Action' portion of the form, where you will enter/select the values to be used when the new contracts are created.
    - Select 'Inactivate Current' if you wish to inactivate the old contracts for the selected employees without creating new contracts for them.
- Step 4 allows users to review a list of employees selected for update, along with the values to be used when creating the new contracts or inactivating old contracts. The system will require the user to confirm that they wish to proceed with the mass update. The user will click 'Next' to start the mass update.
    - Note that if Part-Time contracts are being created, if the Percent Employed on the new contract is different from the previous year's contract (or if the previous year's contract did not contain a Percent Employed), it will need to be adjusted individually based on current staffing needs. Adjustments to each individual's contract Percent Employed can be made by selecting Employee Demographics → Other → Contracts.
- Step 5 displays a confirmation page once the mass update has been completed.
    - If the user opted to 'Create New' contracts, the system will display a 'Created' section on the page that lists each employee for whom a new contract was built. It will also display an 'Inactivated' section that lists each contract that was inactivated.
    - If the user opted to 'Inactivate Current' contracts, the system will display an 'Inactivated' section only, that lists each contract that was inactivated.
    - A 'Start Again' button is also included on this page to allow users to return to Step 1 and start the process again for a different group of employees.

Removed Old Mass Update – Contract Active Setting:

- This old mass update was created several years ago when the Contract Status field was initially added to HRMS. The purpose of this mass update was to allow LEAs to specify whether their contracts were to be marked active or inactive at that time. This mass update has become obsolete and is being removed to avoid confusion.

Change to Web Report 000126 – Race/Ethnicity Report:

- Option 1 on this report previously showed employees with no new Race/Ethnicity data entered into HRMS. But it previously did not include employees marked as Hispanic/Latino ethnicity who had no Race(s) marked. Recently we realized that all employees, even those of Hispanic/Latino ethnicity, must have at least one Race marked on the HRMS Employee Demographics form. This report will help your LEA find all the employees who are missing a new Race code on the HRMS Demographics form.

V5.5 (February 2010)

Background information: In the 2007 legislative session, the NC legislature passed a law (SB 1292) that requires the addition of 3 CEU credits per 5-year license renewal cycle for teachers (K-12) in their academic subject areas, including strategies to teach those subjects. Changes were made in Release 4.7 that allowed LEAs to enter and track the new type of CEU credits. But at the time Release 4.7 was implemented, it was not yet clear whether this credit was intended to be tied to a teacher's License Areas or the subjects they were teaching. Consequently, there were no validation rules enforced around the assigning of Academic Credits included with Release 4.7.

Since then, the DPI Licensure Section's interpretation of this new policy states that Academic Credits can be granted for courses/workshops that pertain to the content, or the methodology of teaching the content, of any teaching License Area that is posted on an individual's NC Teaching License. That clarification led to a decision by the HRMS Steering Committee to go back and add validation to HRMS, to ensure that each teacher holds a qualifying License Area before they are awarded Academic Credit for a course. That additional validation is the primary focus of Release 5.5.

Upon the recommendation of the Licensure Section, the Steering Committee also decided to modify HRMS to make it restrictive enough to prevent teachers from earning both Academic Credit and Reading Credit for the same course. This is due to the rule (based on State Board policy) that states that an individual course/workshop cannot be counted toward two state sub-category licensure requirements simultaneously (i.e. Reading Methodology and Academic Credit). However, CEU credits for a course can be split between these two categories. Release 5.5 has added new validation that splits Reading and Academic credits, in situations when both types of credits are being awarded for a course and the LEA does not split the credits before assigning employees to the course.

More details about the new validation that has been added in LEA Release 5.5 follows below.

Note: Items highlighted in red require some attention on the part of the LEAs.

New LEA Configuration 'License Categories' Form:

- The 'License Categories' form allows LEAs to create and maintain License Categories. License categories allow the grouping of multiple License Areas into Content Area(s). These new License Categories will be used by the Staff Development Clerk when creating a Course Template and/or assigning employees to a course that is eligible for Academic Credit.
- A list of system-defined License Categories have been established by the HRMS Steering Committee and are intended as a baseline for LEAs to work from. These system-defined License Categories can be viewed on the 'License Categories' form and contain a blank in the "Local" column. System-defined Categories are not editable or removable by LEAs.
- LEAs can create additional locally-defined License Categories by entering the new License Category and Description at the top of the 'License Categories' form and clicking on the "Add" button. These locally-defined categories can be modified later if needed.
- If LEAs ever wish to remove a locally-defined License Category, that can be accomplished by changing its "Enabled" indicator (at the top of the form) to "No". This will prevent the License Category from being used in the future. Note: Setting this value to "No" will not affect Academic Credit previously awarded based on this License Category.
- Please have a System Administrator review the list of system-defined License Categories on the 'License Categories' form and add any locally-defined categories that are needed for your LEA.

New LEA Configuration 'License Area/Category Cross Reference' Form:

- The 'License Area/Category Cross Reference' form allows LEAs to map License Categories shown on the 'License Categories' form to individual License Areas. Each License Area should be mapped to all License Categories that apply. These mappings will be used by the system when Academic Credits are assigned for a course, to ensure that each employee being awarded Academic credit has a qualifying License Area.
- A base mapping of License Categories to individual DPI License Areas has been established by the HRMS Steering Committee and is intended as a baseline for LEAs to work from. A list

of these mappings that show the link between individual DPI License Areas and the corresponding License Category(s) are displayed on the 'License Area/Category Cross Reference' form. These mappings are editable so that each LEA may adjust them to suit their needs.

- LEAs can also create new mappings of License Areas to License Categories by selecting the appropriate License Area and the desired License Category and clicking on the "Add" button. An "All" option is available if the LEA wishes to link all License Categories to a particular License Area.
- If the LEA wishes to remove a pre-existing License Area/License Category link, click on the appropriate License Area in the list. The system will display the License Area and License
- Category in the first section in the form; click on the 'Delete' button to disassociate the applicable License Area from the License Category.
- Please have a System Administrator review the mappings on the 'License Area/Category Cross Reference' form and add any additional mappings, or modify any pre-existing mappings, that your LEA deems appropriate.

Course Management Console:

- The former 'Course Management Console' link on the LEA Home page has been renamed to 'CEU Template Mgmt'. The CEU Template Management form is basically the same, except that some of the old mass updates have been removed because they were obsolete. The only remaining mass updates are the "Single Course" and the "Reading Credit" mass updates.

Changes to CEU Template Form:

- The old 'CEU Course Template' form has been renamed to 'CEU Template'. This form has been modified to require LEAs to assign one or more License Categories for each course template that is designated to receive Academic Credit. The License Categories selected on this form will determine which License Areas are deemed eligible to receive Academic Credit for this course, at the time the course is assigned to one or more employees.
- New validation has been added to this form for Academic and Reading credits only:
  - Unless Reading Methods and Academic Credits are equal, the sum of the two cannot exceed the Total Renewal Credits (or 150% of Semester Hours).

Changes to Continuing Education Class Form:

- This form has been modified to require the assignment of one or more License Categories for each course template that is designated to receive Academic Credit. The License Categories entered on the Course Template are defaulted onto this form but can be modified before the class is assigned. (Note that changes made to License Categories on this form will not be saved to the Course Template).
- When this form loads, if the Course Template indicates that this course is to receive Academic Credit but the LEA has not yet assigned any License Categories on the Course Template, a warning message will be issued. The user will be instructed to click on the 'Edit' link beside the Course Code to return to the Course Template form and select the License Categories that are eligible for Academic Credit.
- New validation has been added to this form for Academic and Reading credits:
  - Unless Reading Methods and Academic Credits are equal, the sum of the two cannot exceed the Total Renewal Credits (or 150% of Semester Hours).

- The process of selecting the roster of employees to assign to the course has not changed. But when the roster is submitted, the grid at the bottom of the Continuing Education Class form now displays the number of Reading and Academic Credits that each employee will receive (if applicable). The form also allows users to make changes after the roster is selected and refresh the form to see how the changes impact the Reading and Academic Credits for each employee.
- Changes to the process of assigning credit for courses that qualify for both Reading Methods credits and Academic credits:
  - If the LEA has designated a split between Academic credits and Reading credits, the credits will be posted as entered for each employee as long as the sum of Academic Credits and Reading credits does not exceed the Total CEU Credits for the course.
  - If the LEA has designated an equal number of Reading Methods credits and Academic credits for the course, and the sum of those two exceeds the Total Renewal Credits, the system will split the credits based on each individual's previous CEU Reading Methods credit balance for the renewal cycle that the course complete date falls within.
    - If the employee's previous Reading Methods Credits total for the applicable renewal cycle is less than 3, then the system will post sufficient Reading Methods credits to bring the employee's balance up to 3 units (the total amount needed for renewal). Any remaining credits will be posted as Academic Credits, as long as the employee has a License Area that has been deemed eligible for Academic Credit for the course (See second bullet below).
    - If the employee's previous Reading Methods Credits total for the applicable renewal cycle is already 3 (or greater), then the system will post all the credits as Academic credits, as long as the employee has a License Area that has been deemed eligible for Academic Credit for the course (see bullet below).
- New validation has been added when an employee is to receive Academic credits:
  - The system evaluates each employee in the roster to determine if they hold a License Area that qualifies them for the Academic Credit. This is accomplished by examining the License Categories assigned to that course, then obtaining the list of License Area(s) that have been mapped to the License Category (as shown on the 'License Area/Category Cross Reference' form).
    - If an employee has one (or more) of the License Areas in that list, then they qualify and are awarded the Academic Credit.
    - If an employee does not have any qualifying License Areas, they do not receive the Academic Credit. However, all other CEU credits are awarded without regard to the License Area(s) held by the employee.
- Important: HRMS users may adjust an individual's CEU credits using the 'Continuing Education Employee History' form if they wish to override the new rules being enforced on this form when Academic credits and/or Reading credits are being awarded.
- After submitting the form, and after all the validation has been completed, a confirmation page displays showing the number and type of credit assignments awarded in all subcategories for each employee.

Changes to Continuing Education Employee History Form:

- The grid at the top of the form that displays the employee's Licensure information has been modified to include the License Category for each of the employee's teaching License Areas.
- When a user adds the employee to a class, the system now uses the same class assignment form that is used when assigning a roster of employees.

- When a class is edited for a single employee, the new rules for splitting Reading and Academic Credits, and the new validation process for ensuring that the employee has a valid License Area before awarding Academic Credits, are bypassed.

Changes to Single Course Mass Update Form:

- Previously, users had to enter the appropriate course code number and enter a Course Complete Date to find the course they wanted to update. Starting with this release, users enter the course code number, click on the 'Find Class' button, and the system displays a grid that lists each instance of the course for which one or more employees have received credit. The user selects the course(s) they wish to update, then clicks the 'Find Attendees' button. The system returns a list of all employees who received CEU credit for the course(s) on the date(s) selected. Users have the option to exclude particular employees from the update, then they click the 'Update Selected Attendees' button to start the mass update. The mass update performs these functions for each employee selected for update:
  - For employees whose continuing education records are being updated, the system deletes the old continuing education credits (for that course only) and adds them back using the latest Course Template.
    - Note that if License Categories for this course template have been added or changed since employees initially received credit for the course, this process can result in their losing Academic credits that they were initially awarded. But if that happens and the LEA wishes to restore those credits to individuals, remember that adjustments can be made to each individual's CEU credits on the 'Continuing Education Employee History' form.
  - For courses where both Reading Methods Credits and Academic Credits are being awarded, the system applies the same rules for awarding and/or splitting credits that are outlined in the section above entitled 'Changes to Continuing Education Class Form'. For more information, see bullet entitled: "Changes to the process of assigning credit for courses that qualify for both Reading Methods credits and Academic credits".
  - For employees who are to receive Academic Credit for the course being mass updated, the system applies the same rules outlined in the section above entitled 'Changes to Continuing Education Class Form'. For more information, see bullet entitled: "New validation has been added when an employee is to receive Academic credits".
  - After the mass update has successfully completed, the system displays an 'Update Credits Confirmation' page. Course template information is displayed, along with a list of all employees whose continuing education information was updated. This list includes Employee Name, Course information, and the number and types of all credits assigned as a result of the mass update. A "Print Button" is also included so that LEAs can print an audit trail.

Changes to Reading Credit Mass Update:

- Courses that qualify for both Reading Methods Credit and Academic Credit can no longer be updated using this mass update. For courses where both types of credit apply, the 'New Reading Credits' button will be disabled on this form. This is due to the complexity of the new rules now required (and the difficulty in splitting credits) when a course qualifies for both Reading Methods credit and Academic credit. LEAs may adjust Reading credits for these courses (by individual employee) using the 'Continuing Education Employee History' form.

Removal of Several Old CEU Mass Updates:

- The old 'Academic Credit Mass Update' feature has been removed. Considerable effort would have been involved in bringing it up to date with the new validation rules revolving around Reading Methods Credits and Academic Credits. Given the fact that this mass update was rarely used anymore, it was not cost effective to invest the time needed to bring it up to date.
- The old 'Principals Credit Mass Update' and 'High Quality Mass Updates' have also been removed. Some new auditing features were added to the mass updates in this release that would have required an upgrade to these old mass updates. Given the frequency with which they were being used, the Steering Committee felt that it was not cost justifiable to invest the time bringing them up to date.
- Remember that LEAs continue to have the option to update these types of CEU credits for individual employees using the 'Continuing Education Employee History' form.

Changes to Lookup My CEUs Form:

- Modified this form so that it now works with Firefox on the Mac.
- Modified the 'No Credit' column so that a blank is now displayed if the value is "No". An "X" is displayed if the value is "Yes" (indicating that no credit was awarded).

Misc. Enhancements:

- Added sorting capability on the 'Internal Audit' column on the 'Screen Applications' form and the 'Activate / Inactivate Individual Applications' form. Also added "Application Create Date" as a sortable field on these forms as well as the 'Applicant Search' form.
- Added Position End Date and Vacancy Closing Date to the 'Vacancy Details' form, accessed via the 'Job Postings' link on the LEA Home page.
- Made a minor change to wording of the tenure question on the application. Changed the word "another" to "a", such that the question now reads: "Have you achieved tenure in a NC school system?"
- Added home phone and cell phone numbers to the Substitute lists on the Principal's Employee page.
- Added position number to all employee lists on the Principal's Employee page. Other minor adjustments were also made to column sizes and headings in order to resolve printing issues reported by several LEAs.
- On the 'Create Position' form, when copying from an existing position, the Position number continues to display after the user clicks Go. (Previously, the position number was blanked out.)
- Corrected a bug that was occurring on the 'Internal Job Postings' internal transfer form. The comment entered on this form is supposed to be visible on their applications for transfer, but the comment entered the first time the applicant completed the form was what was actually being displaying on the application.
- The LEA Home page has been altered such that the "Edit" link that allows updating of the LEA Key Contacts is available only to Systems Administrators.
- The "Include Archived Assignments" option has been removed from the 'Payroll Position # Update' form. This feature was no longer relevant since the only assignment budget codes remaining in HRMS were the Additional pay budget codes.
- Emergency Contact information has been added to the 'Employee Display' form that is accessible from the Principals page, when 'Employee Info' is selected.
- Corrected a bug in the Pending Status Changes table that was preventing multiple pending status changes from being made on the same date for an employee.

- Corrected a bug in the 'Interview Schedules' form that was preventing scheduled interviews from being displayed.

Query Builder Enhancements/Changes:

- Modified the Employee Archived Assignments table (**EMP_ASSIGN_ARCHIVE)** in Query Builder to include archived position information.
- Added a new table in Query Builder: "**PositionAssign_All_V**". This table is comprised of all assignments (Current, Future and Archived) along with Position data. Current and Future Assignments are connected to the current position data. Archived assignments reflect position information at the time of the archive.
- New Reporting Group "**Assignments - All**". Comprised of the following tables: Employee, PositionAssign_All_V, Position Title Dom, Site and Race_Flat_V.
- New Reporting Group "**Assignments – BC - Archived**". Comprised of the following tables: Employee, Archived Assignments, Archived Assignment Budget Codes, Site, Position Title and the new Race Ethnic List
- Removed "Assignment Term" from all Tables and Views in Query Builder since the "Term of Employment" is always inherited from the position.
- Modified the following Reporting Groups (All use the SITE table) to reference the Site table in a different way in preparation for future table changes.
  - *Reporting Group Updates for Unt_Local Ind EQ 1*
  - Assignments – Basic
  - Assignments – Basic (Local Use)
  - Contracts 1
  - Contracts 1 Future
  - Contracts 2
  - Contracts 3
  - Contracts 4
  - Vacancies 1
  - Vacancy Candidates 1
  - Vacancy Candidates 2
  - Vacancy Candidates 3

V5.4.1 (September 2009)

New Web Reports:

- 000021 – Teacher Fund Source Reconciliation Report – This report lists anyone with a discrepancy between the SS-300 Teacher category selected on their position and the Payroll fund code from which they are being paid. These categories on the positions should be adjusted before running the SS-300 report.
- 000022 - Inactive Employees with Current Assignments – This report lists anyone with a Current Assignment who has an Inactive or Pending Employment Status. In most cases, either their assignment should have ended, or their employment status needs to be changed to an active status.

Other Enhancements:

- Expanded the 'Other' field on Licensure Form R from one to three lines.

V5.4 (September 2009)

Race/Ethnicity Changes:

- The U.S. Dept. of Education has recently adopted a new method of identifying ethnicity and race for LEA staff. HRMS has been modified to track and store the new Race/Ethnic data required. The following forms have been updated:
  - Employee Demographics
  - New Employee Demographics
  - New Hire Employee Demographics – Edit
  - New Hire without Vacancy Permit Employee Demographics
  - Employee Display
  - Employee Summary
- The Demographics section of the above mentioned forms has been modified to include a two-part question for the new race/ethnic information.
  - Question 1 is: “Hispanic/Latino?”
    - This question is required.
  - Question 2 is: “Which race(s) is this employee considered to be?” There are 5 Races available for selection; multiple selections are allowed.
    - The user must select at least one Race if the answer to Question 1 was No. Multiple races can be selected.
- The old Ethnicity field is being retained in HRMS files for the foreseeable future. The new Race/Ethnic values will be stored in a separate file. The old Ethnicity value will continue to be displayed on the Demographics forms as “Old Ethnicity”.
- As part of the rollout process, new Race/Ethnic values have been created in HRMS files for the employees whose old Ethnicity easily maps to one of the new values. The new Race/Ethnic values were pre-populated as follows:
  - If old Ethnicity = B (Black), C (Caucasian), or I (American Indian or Alaska Native), Hispanic/Latino was set to “No” and new Race was set to “Black”, “White”, or “American Indian or Alaska Native”, respectively.
  - If old Ethnicity = H (Hispanic), Hispanic/Latino was set to “Yes” but no Race(s) were pre-populated. Those employees must be given the option of selecting one or more Races.
  - If old Ethnicity = A (Asian) or O (Other), or if there was no old Ethnicity value in the files, no new Race/Ethnicity values were established. Those employees will have to be re-identified.
- If you wish to record the fact that an employee’s new Race/Ethnic information as displayed in HRMS has been confirmed by Central Office staff, please use one of the Employee Local Use fields for this purpose.
- A new web report (#000126) has been added that will allow you to print a Race/Ethnicity report. This will allow you to easily determine which employees in your LEA have no new Race/Ethnicity codes entered yet. It will also allow you to print a list of employees who are required to be re-classified due to the fact that their old Race/Ethnic code did not map to one of the new Race/Ethnic codes required by the U.S. Dept. of Education. LEAs may run the report for a specific site, or for the entire LEA.
- In conjunction with the implementation of this release, Reporting Tool 4.9 is also being rolled out. Rpt. Tool 4.9 features a new a new data collection form that LEAs can distribute to their employees to facilitate the process of collecting the new Race/Ethnic information required by the U.S. Dept. of Education. This is the sequence of steps that DPI recommends you follow for collecting the new Race/Ethnic data.
  - *Go to the ‘Letters’ portion of the HRMS Reporting Tool and select the new Race/Ethnic Data Collection Form. Select the “Employees Required to Re-Identify Race/Ethnicity”*

report option and run the report. This will generate a data collection form for every employee in your LEA (or the Site selected) who is required to re-identify their Race/Ethnic information.

- *Re-run the Race/Ethnic Data Collection Form with the "Employees Not Required to Re-Identify Race/Ethnicity" report option selected. This will generate a data collection form for every employee in your LEA (or the Site selected) who is NOT required to re-identify their Race/Ethnic information, but should be granted the opportunity to re-identify. (The U.S. Dept. of Education has directed that every LEA employee must be given the opportunity to re-identify.)*
- Distribute these forms to your employees and designate someone to collect them and return them to the Central Office. For all employees required to re-identify, and for the ones not required to re-identify but who marked changes to their Race/Ethnic data, enter their new Race/Ethnic data into HRMS on the Employee Demographics form.
- *After allowing adequate time for all the data collection forms to be returned, re-run the Race/Ethnic Data Collection Form in the 'Letters' portion of the Reporting Tool and select "Employees with No New Race/Ethnic Information in HRMS" report option. This will allow you to determine which employees in your LEA that are required to provide updated Race/Ethnic information have not returned a data collection form. Distribute the data collection forms to those employees again and ask them to return them as soon as possible. Repeat this step until all forms have been collected and updated information has been recorded in HRMS.*

Query Builder enhancements:

- A new table was added to the "Assignments – Basic", "Employee License", "Employee License Area", "Employee License Education" and "Employee CEU" Reporting Groups for the new Race/Ethnicity codes. The table is labeled "Race (New)".
- All other Reporting Groups that use the Employee_With_Local_Use_V (Employee and Employee Local use fields) have the new Race/Ethnicity codes in the RACELIST field, listed with the other "Employee" fields.
- The "Assignments Budget View (Payroll)" Reporting Group has the following new fields available.
  - New "Race List"
  - "Budget Code: Full" (20 character Budget Code)
  - "Budget Code: Seq" (Payroll Sequence number. If an "Additional Pay Budget Code (From HRMS)", then the Sequence number is -1.

Miscellaneous fixes and enhancements:

- In the Vacancy Permit New Hire process, when the Status and Benefits are entered, if there was no selection for the BT Status, it was defaulting to "Late Hire". This has been modified so that if there is no selection for BT Status, there is no default.
- In the Vacancy Permit New Hire process, when a future assignment is entered, the Employee Status is now set to 00 (None). It was being set to "blank" which was causing problems if the future assignment needed to be edited.
- Corrected issue where a Vacancy Permit reaches the "Hired" status, but then must revert back to a lower status, and no longer would appear on the "Job Postings" or the DPI website if desired. The criteria for display is now dependent on the "Post to Web", "Post on Internal Job Postings", and "Vacancy Status") < 80, only.

V5.3.2 (July 2009)

Vacancy permit fixes and enhancements:

- Removed the following three Vacancy Permit options from the Edit Assignment form when an open vacancy exists for the employee/position. LEAs will still be able to set these options on the Add Assignment form during the New Hire process. If they need to be adjusted after the assignment has been added during the New Hire process, this can be accomplished using the Vacancy Management Console/Edit Position form.
    - Inactivate Vacancy Permit/Set Vacancy Status to Hired
    - Remove posting from Web
    - Remove from internal postings
- Modified the Add Assignment form so that a Vacancy Action record is written every time an assignment is added for a New Hire nominee. This will allow LEAs to view the history when assignments were added on the Vacancy Management Console.
- Redesigned the 'New Hire – Current Employee' form that displays when LEAs select a New Hire nominee who is a current or former employee.
    - The three Vacancy Permit options (listed in the first bullet above) were removed. LEAs will have the option to proceed immediately to Add Assignment or Transfer, where those 3 options will appear on the form.
    - Instead of clicking through to a couple more forms, now LEAs will be able to click on the 'Add Assignment' or 'Transfer' button to proceed with the add or transfer function. This should be a little more user friendly.
- Corrected the code to update only the latest Vacancy for a position (when setting Vacancy Status to Hired), when an assignment is added. Previously, if there were multiple Vacancy Permits in the files that were Inactive, Frozen, Archived, etc, the vacancy status for those old Vacancy Permits was getting set to Hired as well.
- Fixed a bug that was displaying candidates multiple times when ranking candidates. This was occurring if the applicant had more than one application type. This problem was resolved by only displaying the candidate when the application type (Licensed, Classified, Bus Driver), matches the position category (Licensed, Classified, Bus Driver).
- No longer allow a Vacancy Permit to be created if there is an existing Vacancy Permit for the same position with a status below 80 (Hired) or if the status is 95 (Frozen).
- When the Vacancy Closing Date passes for a Vacancy Permit posted at DPI, the vacancy will be removed from the DPI website. If the vacancy is to be posted indefinitely, leave the Vacancy Closing Date blank.

Other Enhancements

- Budget Codes with funding source '8' are now available within HRMS on the Edit Position and Edit Assignment forms. Previously, only Budget Codes with funding source '1' through '7' were available.
- Fixed bug where no updates were allowed for the "Status and Benefits" Staff Action if the employee had an inactive status.
    - If the current Employee Status is "None", when using the "Status and Benefits" Staff Action, you do not have to select an Active status in order to save changes. You may leave the status as "None."
- A new Reporting Group for Query Builder is available. The name is "Employee License Area (Local Use, Payroll)." This Reporting Group allows for the reporting of License Area data along with Payroll data. Keep in mind that multiple License Areas and multiple Payroll

Assignment records will cause multiple rows to appear. You will want to "filter" as much as possible.

V5.3.1 (July 2009)

Miscellaneous fixes and enhancements:

- Fixed a bug that allowed users to save without selecting a valid Employee Status on the forms listed below. This resulted in Employee Status being set to an invalid value (-1), which in turn prevented users from Adding an Assignment for the employee.
  - Edit Substitute Profile
  - Status and Benefits (Staff Action)
  - Return from Leave (Staff Action)
  - New Hire with Vacancy Permit – Benefits
- Modified Web Report 000019 (Employees with Disabled Employment Status Codes) to also list employees with invalid Employment Status Codes.
  - To correct an invalid Employment Status Code (e.g., -1 or blank), use the Status and Benefits Staff Action form.
- Fixed a bug that prevented the Staff Action Request Detail form from displaying when the user clicked a row on the Staff Action Console.
- Adjusted background program that "Reactivates Recently Modified Applications" to reactivate applications modified within the last week as opposed to the last six weeks.
- Fixed bug in Mass Update "Additional Pay Budget Code Step". When "Retrieving All Matching Employees" all staff with current assignments were displaying as opposed to just staff with "Additional Pay Budget Codes."

V5.3 (July 2009)

Note: Items highlighted in red require attention on the part of the LEAs.

Enhancements to Licensure Forms Module:

The online Licensure Forms available within HRMS have been updated to match the latest forms from DPI's Licensure Section. The following is a list of specific changes that have been made:

- Licensure Contacts form
  - An Email Address has been added to the form. When setting up or editing a Licensure Contact, LEAs now have the capability to include an Email Address for that contact. This new field is being stored in the Licensure_Contacts table.
  - This new email address will need to be added for your existing Licensure Contacts, since an email address for the designated official has been added to many of the
  - Licensure forms in this release. You may access the 'Licensure Forms Contact Setup' page to enter this information by clicking on the 'Contact Setup' button in the top right-hand corner of the Licensure Forms Management Console.
- Form A
  - An email address for the Applicant has been added to the form.
  - A section previously found in the middle of the form, "List the Areas of Licensure for Which You Are Applying" has been removed.
- Form C
  - An email address for the designated official has been added to the form.
- Form CC
  - A 'Name on Credit Card' field has been added to the form.

  - Telephone Number and Email Address for the applicant has also been added to the form.
- Form CE
  - Telephone Number and Email Address for the applicant has been added to the form.
- Form CEL
  - Email Address for the Superintendent (or designee) has been added to the form.
- Form CT
  - Email Address for the Superintendent (or designee) has been added to the form.
  - A line for the signature of the applicant, and the date, has been added to the form.
- Form E
  - An email address for the Applicant has been added to the form.
- Form EP
  - Email Address for the Superintendent (or designee) has been added to the form.
- Form G
  - Email Address for the Superintendent (or personnel officer) has been added to the form.
- Form HQ
  - Email Address for the Superintendent (or personnel officer) has been added to the form.
  - Email Address for the NC HOUSSE Evaluator has been added to the form.
- Form I
  - The title of the form has changed from "Application to Add In-Field Licensing" to "Application to Add Provisional License Area".
  - Email Address for the Superintendent (or designee) has been added to the form.
  - Email Address for the Workforce Development Director has been added to the form.
  - A section previously found in the middle of the form entitled "List of Coursework Already Completed in the Subject" has been removed since it was obsolete.
- Form LE
  - Two new boxes have been added after the 'Praxis Test Scores' box:
    - Qualifying with ____ Semester Hours
    - Qualifying with Praxis II Test(s)
  - Email Address for the Superintendent (or designee) has been added to the form.
  - Email Address for the applicant has been added to the form.
- Form M
  - Email Address for the Superintendent has been added to the form.
- Form N
  - Email Address and Phone Number for the Superintendent have been added to the form.
- Form NE
  - Email Address for the employer has been added to the form.
- Form OS-HQ
  - Email Address for the Designated State Licensure Officer has been added to the form.
- Form R
  - Email Address for the Superintendent or Designee has been added to the form.
  - Two new options have been added to the list of actions that can be requested:
    - Extend Standard Profession I
    - Convert to a Standard Profession II
- Form RN
  - Email Address for the Personnel Administrator has been added to the form.
- Form U
  - LEA and Unit Number have been added to the form.

- A new option has been added to the list of actions that can be requested:
  - Other
- Email Address for the Superintendent has been added to the form.
- Email Address for the applicant has been added to the form.

- Form V
  - Email Address for the Designated Official has been added to the form.
- New Form AIL (Verification of Ability to Impact Student Learning)
  - This new form has been added to HRMS; it has also been added to Group SR12
- Removed the following Obsolete Forms from HRMS
  - AEL (Request for Alternative Entry License)
    - Group SR9 was also removed
  - ETP (Extension of Temporary Permit)
    - Group SR22 was also removed
  - TW (Request for Waiver of Test Requirement)
    - Group SR38 was also removed
  - HQ-1 (LEA Recommendation for Designation as “Highly Qualified”)
    - Group SR30 was also removed
    - Form HQ-1 was also removed from Group SR40
- Groups that had Forms Added to Them
  - SR2 – Form R added
  - SR12 – Form AIL added
  - SR16 – Form R added
  - SR17 – Form LE added
  - SR27 – Form CC added

Minor Enhancements to Add Assignment form:

- The ‘Cancel’, ‘Save & Close’ and ‘Save & Edit’ command buttons were previously located at the bottom of the form. In order to reduce confusion, they were moved up to the lower portion of the ‘Assignment Information’ section, so that they are closer to the sections that they pertain to. Another ‘Cancel’ button will still be available at the bottom of the form.
- When adding an assignment for a licensed position, if the Position Grade is “N/A”, the assignment Grade now defaults to “Select”, so that users are forced to make a Grade selection rather than allowing it to default to “N/A”.
- When adding an assignment, an error message is displayed if the person is on the Do Not Hire List, and the assignment is not allowed to be added.

Minor Enhancements to Edit Assignment form:

- When an assignment has both a current and a future assignment, the wording of the warning message has been changed to: “WARNING – Another employee has a current or future assignment for this position. Assignment Dates cannot overlap. See ‘Position Assignment History’ below for a list of existing assignments for this position”.
- The ‘Save’ link on the “Payroll Budget Codes with Missing/Invalid HRMS Position #” grid has been renamed to ‘Update Payroll’.
- When requesting new budget codes that are not based on existing Position Budget Codes, the Site will now default in the Site from the position (users can override that Site number though, if needed).
- The ‘Close’, ‘Save & Close’, ‘Save & Edit’, and ‘Delete This Future Assignment’ (future assignments only) command buttons were previously located at the bottom of the form. In order to allow users to save changes to the assignment record without having to scroll to the

bottom of the form, they have been moved up to the lower portion of the 'Assignment Information' section. An additional 'Close' button is still available at the bottom of the form.

Minor Enhancements to Add Assignment and Edit Assignment forms:

- The following validation has been added on the "Is this the Employee's Primary Position?" question, when the user saves the form.
    - If 'No' was checked and this employee has no other pre-existing current or future primary assignments, then the system will display the following warning message: "There is no other primary assignment for this employee, so you should not designate this assignment as secondary unless you are about to add another primary assignment."
    - If 'Yes' was checked and the employee already has another pre-existing current or future primary assignment, then the Start & End Dates for both assignments are checked. If there is an overlap between dates, then the system will display the following error message: "There is already another primary assignment for this employee after <date>, so you may not designate this assignment as primary until you change the existing primary assignment to be either secondary or to have an assignment end date that won't overlap with this assignment."
- The employee related dates have been separated from the assignment dates on both these forms, to avoid confusion.
    - Original Hire Date, Last Hire Date and Termination Date have been moved up into the 'Employee Information' section.
    - Effective Date, Start Date and End Date remain in the 'Assignment Information' section.
    - A new hyperlink entitled "Change" has been added to the right of the Original Hire Date that will take you directly to the "Original Hire Date" Staff Action form. This hyperlink prevents you from having to return to the Employee Demographics form to select the "Original Hire Date" option from the "Other" menu at the top of the form, if you need to update this date.
        - Note also that the old "Start Date" Staff Action form has been renamed "Original Hire Date" in order to reduce confusion.
- Changes to the rules for the Last Hire Date have been made on both forms. These changes were necessary because some LEAs were not entering a value into this field, even when hiring
- a person who has not worked for the LEA previously. The following rules are now being enforced:
    - Add Assignment/Transfer form, without Vacancy Permit process:
        - This is now an editable, required field.
        - The system will still default in the old value from the Last Hire Date.
    - Add Assignment/Transfer form, with Vacancy Permit process:
        - This is now an editable, required field.
        - The system will no longer default in the value from the Original Hire Date.
    - Edit Assignment form (with or without Vacancy Permit process):
        - This is now an editable, required field.
- When an End Date is placed on an assignment, the system will now set the Position Status to 'Pending Vacant'.

Modifications to Employee Demographics form:

- Removed the 'Modify' option from the 'Assignment' menu at the top of the form. (This was no longer needed, since users are now accustomed to clicking on the 'Edit' link to access the Edit Assignment form.)
- Future/Pending Employment Status Codes for the employee (if any exist) are displayed immediately below the Current Employment Status Code.
  - Status Code Description and Effective Date of each pending status change are included (if the employee has more than one pending Status Code change, all are displayed).
  - Future/pending Status changes are displayed only if they differ from the employee's current employment status code.

Modifications to Candidate Conflicts forms (Vacancy Permit process):

- Changes to Candidate Conflicts Report for Principals/Hiring Agents:
  - SSN column - changed to display only the last 4 digits.
  - Candidate's Status on Vacancy column – changed to display only if the position is at this user's site.
  - Vacancy Status column - renamed 'Position Vacancy Status' to reduce confusion. Also changed to display only if the position is at this user's site.
  - Position Description column – changed to display Position Description (was previously displaying Position Title). Position Description will no longer be displayed unless the position is at this user's site. If this position is an administrative vacancy at this user's site, the system will continue to display 'Administrative'.
  - Modified report to include only vacancies that are still in the hiring process (vacancy status < 80). (Previously, vacancies with a status of Hired, Inactive, Frozen or Archived were included in some cases.)
- Changes to Candidate Conflicts Report for Systems Administrators:
  - SSN column - changed to display only the last 4 digits.
  - Vacancy Status column - renamed 'Position Vacancy Status' to reduce confusion.
  - Position Description column – changed to display Position Description (was previously displaying Position Title).
- Changes to Candidate Conflicts Report for a Single Vacancy for Principals/Hiring Agents:
  - SSN column - changed to display only the last 4 digits.
  - Candidate's Status on Vacancy column – changed to display only if the position is at this user's site.
  - Vacancy Status column - renamed 'Position Vacancy Status' to reduce confusion. Also changed to display only if the position is at this user's site.
  - Position Description column – changed to display Position Description (was previously displaying Position Title). Position Description will no longer be displayed unless the position is at this user's site. If this position is an administrative vacancy at this user's site, the system will continue to display 'Administrative'.
  - Modified report to include only vacancies that are still in the hiring process (vacancy status < 80). (Previously, vacancies with a status of Hired, Inactive, Frozen or Archived were included in some cases.)
- Changes to Candidate Conflicts Report for a Single Vacancy for Systems Administrators:
  - SSN column - changed to display only the last 4 digits.
  - Vacancy Status column - renamed 'Position Vacancy Status' to reduce confusion.
  - Position Description column – changed to display Position Description (was previously displaying Position Title).

- Modified report to include only vacancies that are still in the hiring process (vacancy status < 80). (Previously, vacancies with a status of Hired, Inactive, Frozen or Archived were included in some cases.)

Other Miscellaneous Modifications:

- When performing a transfer of an employee from one position to another, the system now checks the Start Dates for all assignments for the position(s) being transferred out of, to ensure that the End Date entered for these assignments is at least one day after all the Start Dates. If it is not, the system displays an error message and prevents the transfer until the End Date is adjusted.
- If hiring an employee without using the Vacancy Permit process, the system has been modified to display an error message if the person is on the Do Not Hire list.
- The “Employees with No Primary Assignment” view has been modified to also include employees who have zero or multiple primary assignments. The link to this view has been changed to “With Zero or Multiple Primary Assignments” and can be accessed via the following paths from the LEA Home Page:
    - Employees → With Zero or Multiple Primary Assignments
    - Employees → Employee Page → Views → With Zero or Multiple Primary Assignments
- Modified the description for Employee Status Code 21 from ‘Temporary Part-Time (< 6 months regardless of Percent Empd)’ to ‘Temporary Part-Time’. This will allow LEAs to use code 21 regardless of whether an employee works less than 6 months, or longer than 6 months.
- Removed 3 old obsolete BT Status Codes: Code 4, 5 and E from the domain table.
    - For all Active and Leave employees, the old codes were converted as follows:
        - If BT Status Code was 4 or 5, the system converted it to 3.
        - If BT Status Code was E (Emergency Permit), the system converted it to N (Not Required).
    - For Inactive employees and those with an Employee Status Code 00 (None):
        - If BT Status Code was 4, 5 or E, the system converted it to blank.
- Modified the ‘Update Substitutes’ form so that if the employee’s current Employment Status Code has a Status Type of ‘Substitute’ or ‘Substitute Retiree’, the Inactive codes are also included in the drop-down list box of Employment Status Codes.
- Changed Systems Administrator rights so that they have the authority to delete local web reports created by another user.
- Changed Finance Officer rights so that they have authority to create and edit/delete local web reports.

* Modified “Employees With No Primary Assignment” web report to include employees who have multiple primary assignments. This resulted in a change to the report title; it is now called “Employees With Zero or Multiple Primary Assignments”.
* We also need to add a column that indicates whether the employee has no primary assignments, or multiple primary assignments.
    - This view is currently accessed from the LEA Home Page but is not included in the list of views on the Employee page. We may want to consider adding this view to that list in Release 5.3.

V5.2 (May 2009)

Note: Items highlighted in red require attention on the part of the LEAs.

Local Use Field enhancements:

- Added a new ‘Assignment Local Use Field Labels’ Configuration Management form that is accessible from the LEA Configuration menu item on the LEA home page. This form allows entry and/or editing of labels for Assignment Local Use fields (1 & 2) that appear on the Add & Edit Assignment forms. This new form allows you to set the order in which Local Use fields should be displayed on the assignment forms. The form also includes an Active indicator that determines whether the Local Use field is currently in use or not; setting its value to “No” effectively inactivates the field. (Note that data associated with Inactive Local Use fields will not be archived with position assignments.)
- Modified the ‘Position Local Use Fields’ Configuration Management form to function the same way that the new ‘Assignment Local Use Field Labels’ Configuration Management form functions, as described above. The new Active indicator replaces the old “Remove” feature; if you need to remove a Local Use field, you will set its Active indicator to “No” instead of actually removing it. There are still 5 Position Local Use fields allowed.
- Modified the ‘Employee Local Use Fields’ Configuration Management form to function the same way that the new ‘Assignment Local Use Field Labels’ Configuration Management form does, as described above. The new Active indicator replaces the old “Remove” feature; if you need to remove a Local Use field, you will set its Active indicator to “No” instead of actually removing it. A maximum of 20 Employee Local Use fields will be allowed. (The 10 Employee and 5 Differential Local Use fields have been combined, and 5 additional Employee Local Use fields were added in this release).
- Removed the old LEA Configuration Management form for Differential Local Use fields. These fields were combined with Employee Local Use fields, so those field labels will now be maintained on the ‘Employee Local Use Fields’ Configuration Management form.
- The Add Assignment and Edit Assignment forms have been modified to read the new Assignment Local Use field labels instead of the hard coded labels ‘Local Use 1’ and ‘Local
- Use 2’, once the new field labels have been set up by the LEA on the new ‘Assignment Local Use Field Labels’ Configuration Management form.
- New tables have been created for the local use fields, to allow for easier expansion in the future. All the old local use field data has been migrated to these new tables. New views for Query Builder and Ad-Hoc Reporting were created for these new Local Use tables.
- Please note that if your LEA has any local web reports that use Local Use fields, those reports will need to be modified to accommodate the data model changes. Also, any personal saved queries that reference Local Use fields will need to be modified. Please refer to 5.2 Data Model changes document (fill in name) for more information.

Employment Status Code changes:

- Several new employment status codes were added:
  - 29 (SUB RETIRE) - Substitute Retiree Subject to the Earnings Cap.
  - 8A (LVE/FAMILY)– Leave of Absence for Family Reasons, Not Covered Under FMLA
  - 05 (ACT PPTFBF)– Active Permanent Part-Time with Full-Time Benefits

- Disabled (removed) a couple of old employment status codes because they are no longer needed:
  - 18 – Retiree Return PT < 50% Outside Earn Cap
  - 75 – Moved to Non-Teaching Position in LEA

- The reason employment code 75 was disabled is because it really is not an employment status code at all, but rather a reason code for why a teacher moved from a teaching position to a non-teaching position within the same LEA. No current active employees should ever actually have this employment status code, because when they move into a non-teaching position, their employment status code will reflect their new position. Employees who should be reported on the Teacher Turnover Report with Reason Code 75 will be included on that report using a different mechanism other than their current employment status code.
- If your LEA currently has any employees with status code 75, they will need to be converted to another code that reflects their current employment status. If you need assistance with this process, please contact the DPI Help Desk.

- Changed the descriptions of several other employment status codes as follows:
  - 02 – Temporary Part-Time with No Benefits (< 20 hours/week)
  - Note: This description was changed from 'Permanent' to 'Temporary'
  - 03 – Active Permanent Part-Time with Partial Benefits
  - 14 – Retiree Return FT w/No Benefits Under Earnings Cap
  - 15 – Retiree Returning PT w/No Benefits Under Earnings Cap
  - 16 – Retiree Return PT w/Partial Benefits Under Earning Cap
  - 19 – Retiree Return PT w/Partial Benefits Outside Earn Cap
  - 21 – Temporary Part-Time (< 6 months regardless of Percent Empd)
    - Note: The description for status code 02 was changed from 'Permanent Part-Time' to 'Temporary Part-Time' because policy states that a permanent employee is one who earns benefits. A temporary employee works less than 20
    - hours per week or less than 6 full consecutive months (full or part time) and is not eligible for benefits. LEAs should review the Employment Status Codes for all their part-time employees to ensure that they are assigned the correct status code.
  - 73 – Re-Employed Retiree Resigned

- Modified the LEA Configuration Employment Status form, to accommodate data model changes made to the employment status table. The following new fields in the table have been added to this form:
  - Active Indicator – indicates whether the Employment Status Code is used for Active employees, Inactive employees, or those on Leave of Absence.
    - Valid values: Active, Inactive, Leave (default value is Active)
    - Note: Since this is a new field just added, LEAs need to go to their Employment Status Code form (under the LEA Configuration Management menu item) and select a value for all their pre-existing custom-defined status codes).
  - Status Type – indicates the type of Employment Status Code.
    - Valid values for LEA-defined custom status codes: None, Permanent, Contractor, Temporary, Suspended, Retiree, Substitute, Substitute Retiree, Prior Employee, Leave of Absence, Substitute Retiree, Suspended.
    - Note: Since this is a new field just added, LEAs need to go to their Employment Status Code form (under the LEA Configuration Management menu item) and select a value for all their pre-existing custom-defined status codes).
  - Enabled Indicator – determines whether the Employment Status Code is currently in use or not.

  - Valid values: Yes, No
  - For purposes of setting up this new field, DPI assumed that all of your pre-existing custom employment status codes should be set to Enabled. Each LEA should review their custom-defined codes to ensure that all of them are still in use. If you wish to disable (remove) any of your LEA-defined custom Employment Status Codes, set this value to No.

- Modified all forms and processes that selected Leave of Absence status codes 80-89 to also include the new 8A code.
- Modified all forms and processes that selected status codes 01-28 to also include the new 29 code.
- Modified all forms and processes that selected status codes 02 & 03 to also include the new 05 code.
- Added a new LEA Web Report that lists all employees who have disabled Employment Status Codes. This will enable LEAs to clean up any invalid status codes on their employees. (See "Changes to LEA Web Reports" below.

Changes to Selection of Employment Status Codes on various LEA forms:

- Modified the list of Employment Status Codes available in various drop-down lists on LEA forms to be more appropriate and easier to select. All forms now display employment status codes in the drop-down list boxes in ascending order by Status Code number. The status code
- number and full description are displayed, which should make the status codes easier to read and select. Other changes made to various forms include:
  - The Add Assignment and Edit Assignment forms were changed so that the only status codes available for selection are active codes. If the employee's current employment status is already set to a Leave of Absence or Suspended code, then Employment Status Code is no longer editable on this form.
  - The Update Substitutes form was changed so that the only status codes available are codes 01- 50 and 52.
  - The Staff Action Disability form was changed so that the only status codes in the drop down list are codes 82 and 83.
  - The Staff Action Leave of Absence form was changed so that the only status codes in the drop down list are Leave of Absence codes, except 82 and 83.
  - The Staff Action Return from Leave of Absence form was changed so that the only status codes available are active codes.
  - The Staff Action Retirement/Separation/Suspension form was changed such that the status codes made available will depend on which type of Staff Action you selected. For Retirement, the only status codes available in the drop down list are 66 and 68. For Separation, (Resignation, Dismissal, Death in Service), the only status codes available are the active codes, except 52, 66 and 68. For Suspension, the only status codes available are 13 and 89.
  - The New Hire Benefits form and the New Hire Summary form were changed so that the only status codes available are the active codes.

Changes to Tenure Status Codes:

- Removed the P and P* as system-defined Tenure Status Codes. However, LEAs may continue to use those old codes as locally-defined codes; the old P and P* codes that were still in existence have been converted to locally-defined codes. If you are still using the old P and P* codes, you may want to consider changing them. Employees who the P and P* codes for originally used for were those who could not work towards gaining tenure. The process most LEAs are using now is to identify Tenure Status for these types of employees as Temporary.

Problem with Salary Table Load for ISIS LEAs:

- ClearQuest item HRMP00004483. The last alphabetical Salary Schedule (from payroll) was not loading into the Salary Table in HRMS for LEAs with the ISIS Payroll System. This problem was corrected.

Change to New Hire without Vacancy Permit Process:

- When submitting the Employee Demographics form, if you select 'Yes' or 'Both' for the Substitute Indicator, and/or check the Contract box, the confirmation page will instruct you to click the appropriate link on the Employee Demographics form to access the Substitute Profile page or the Contracts page. This change was made to correct a defect in the navigation when users selected both these options simultaneously.

Changes to LEA Web Reports:

- Created a new LEA web report (#000019) that lists all employees who have Employment Status Code 00 (None), or any Status Code that has been disabled. Your LEA should run this new report and clean up any invalid status codes on your employees.
- All LEA Web Reports were reviewed in detail, and some needed cleanup work was performed. Some reports needed modifications, several need to be removed, and a couple of new reports were added.
- Reports that were added:
    - CEU Totals Report (000007) – lists all Licensed staff along with the total CEUs they have acquired during their current renewal cycle.
    - CEU Renewal List by Course – lists all staff who received credit for a specified course.
- Reports that were removed because they were redundant or were no longer needed:
    - SS-300 Teachers Vocational Funded (000130)
    - SS-300 Teachers Vocation Funded – With Position Budget Codes (000131)
    - Substitutes by Subject_old (000111)
    - Positions by Site (Auto Launch) (000112)
    - Employee and Assignment Detail (000132)
    - Substitutes (000116)

Query Builder Enhancements:

- New Reporting Groups
    - Due to the Data Model changes for Employee, Assignment and Position Local Use fields, new Reporting Groups were created. The five main Reporting Groups, "Assignments Basic", "Employee CEU", "Employee License", "Employee Education", "Employee License Area", and "Employee License Education", are now listed twice. They are listed once where the name includes "(Local Use)" and once where the name does not include "(Local Use)". Local Use Fields, for these Reporting Groups, are only available with the Reporting Groups where "(Local Use) "is in the name. **ONLY** use the Reporting Groups with "(Local Use)" in the name when you need to access these Local Use fields. These reports will be much slower.

- **Position_Budget_View** (Just keep in mind this one references budget codes on the positions, not in Payroll)
- New Table
    - Payroll_Employees – Displays the Payroll ID.
- Other
    - Inst_Higher_Educ_Dom – Has more user friendly field names
    - Education_Level_Dom – Has more user friendly field names
    - License_Area_dom – Has more user friendly field names
    - Other smaller issues corrected

V5.1.1 (October 2008)

Miscellaneous fixes and enhancements:

- Added Primary Position No. to Employee Summary form.
- Added Payroll Employee ID to Employee Demographics form.
- Modified the Employment Status LEA Configuration form to disallow LEAs from adding custom status codes in the 05-09 and 29-38 range. (Steve Andrew is working with LEAs who were using custom codes in this range to get them moved to other codes.)
- Modified the Add Assignment form and Edit Assignment forms to allow users to select employment status codes for substitutes, in addition to the codes that were already available.
- Modified the Employee Assignment Details form:
    - Display Pending Budget Code Requests in descending order by Request Date.
    - Added Staff Action Request number.
    - Removed seconds from display of Requested and Processed Dates.
- Fixed the broken Position link and removed the Staff Action link at the top of All Employees & Substitutes, Absences, Licensure Data, and Position/ Employee Hierarchy forms.
- Added a setting to the LEA Configuration form that allows LEAs to adjust the number of search results returned on the Search Applicant and Activate/Inactivate Applications forms.
- Modified the Employer Picker form so that when the user enters the search criteria desired, the Primary Site Number and Primary Position Description are returned in the grid with the SSN and Name.
- Modified the CEU forms so that when assigning employees to courses, the search results returned include the Primary Site Number and Primary Position Description (in addition to SSN and Name).

V5.0.3

Miscellaneous fixes and enhancements

- Changed the heading in the Totals section of CEU history forms to read "Total CEU Credits" rather than the previously unclear "CEU Credits".
- On the Add Position form, the Position # that was being generated as a suggestion was not always correct. This occurred when the attempted Position # was using leading zeroes.
- Fixed a bug where when saving a Position, if the site code had only 1 or 2 characters, it wasn't being saved properly.
- Fixed a bug in Vacancy Permit where previous vacancy information was being displayed when "announcing" a new vacancy.

- Fixed a bug where vacancies other than the most recent were causing Position searches to return duplicates.
- Fixed a bug where when whiting out email addresses and phone numbers on Employee Demographics, the changes were not being saved.
- Added a warning message to the LEA Configuration settings warning the user to contact DPI if they are turning ON the HRMS to Payroll interface.
- Fixed an issue where the new FinanceOfficer role was being given higher level access than was intended.
- Fixed an issue where the Dismissed Teacher List security group was not being uploaded to DPI correctly and thus preventing users from being able to see the list on the Applicant system.

V5.0.2

Search Applicants, Activate/Inactivate Applicants

- The maximum number of applicants that can be displayed has been set to 500. This was done to help troubleshoot ongoing performance problems related to long running searches.

Finance Officer Role

- Finance Officer should now be able to get into all Web Reports and successfully run a query from Query Builder.

V5.0

Payroll Interface Changes

HRMS Will Read Assignment Base & Supplement Budget Codes from Payroll

- Base & Supplement Assignment Budget Codes will no longer be stored in HRMS files. Instead, they will be read from active Payroll assignments and displayed within HRMS. HR users will no longer have authority to update Base & Supplement Assignment Budget Codes since they are owned by Payroll; instead, they will create budget code information “requests” to send to Payroll using the Edit Assignment form.

Additional Pay Assignment Budget Codes to be Retained in HRMS

- Additional Pay Assignment Budget Codes will continue to be stored in HRMS. The only reason for retaining Additional Pay budget codes in HRMS is to provide HR users a way to record supplement budget codes that should be included on the SS-300 report but are not stored as assignments in Payroll. These payments are typically handled as one-time (quick-pay) payments in Payroll.

Position Budget Codes Will Continue to be Stored in HRMS

- Position Budget Codes will be retained in HRMS, but their primary purpose will be to store budget code information for positions that are vacant, or for the next person hired into positions that are currently staffed.

New Mass Update to Assist LEAs in Removing Old HRMS Assignment Budget Codes

- As part of the implementation process for Release 5.0, your LEA should remove old HRMS assignment base & supplement budget codes that are no longer needed. DPI also recommends that you remove old HRMS Additional Pay assignment budget codes, and add back the valid Additional Pay budget codes. Use the new ‘Remove Old HRMS Additional Pay Assignment Budget Codes’ mass update form for this purpose.

New Mass Update to Assist LEAs in Refreshing HRMS Position Budget Codes

- As part of the implementation process for Release 5.0, your LEA should also remove old HRMS position budget codes and rebuild them from current assignment budget codes. Base & Supplement position budget codes will be rebuilt from current payroll assignments; Additional Pay position budget codes will be rebuilt from current HRMS Additional Pay assignment budget codes. Use the new ‘Remove/Refresh HRMS Position Budget Codes’ mass update form for this purpose.

‘Create Position’ Form Renamed to ‘New Position’ Form

- The old ‘Create Position’ form has been renamed ‘New Position’ and has been redesigned to be more user friendly. A new indicator has also been added to this form, for the purpose of blocking updates to position budget codes when the current employee leaves. Normally, when an employee leaves his current assignment budget codes will be saved to the position budget codes unless this “Allow Update” indicator is set to “No”. If you prefer for any particular position to be excluded from being automatically updated when an employee leaves the position, set this indicator to “No”. All positions have been initially defaulted to “Yes” (allow automatic updates).

Changes to ‘Edit Position’ Form

- This form has also been redesigned to be more user-friendly, and includes some changes in functionality. Changes made to Salary and Payment Information and position budget codes no longer ripple down to associated employee assignments and assignment budget codes. If you need to change an existing employee’s assignment information, you should go directly to the new Edit Assignment form (replaces the old Modify Assignment form). It is no longer necessary to modify salary and payment information for existing employees at the position level. In fact, normally you will enter salary and payment information at the position level only when the position is vacant, or if you wish to record information for the next person hired into the position that differs from the salary and payment information of the employee currently assigned.

- The new “Allow Update” indicator added to the New Position form has also been added to this form. It has the same purpose, for blocking updates to the position when the current employee separates. If you change the “Allow Update” indicator from “No” to “Yes”, the system will ask if you wish to refresh the position information from a current assignment. If you do, you should proceed to the bottom of the Edit Position form where the current assignments are listed, and click on the 'Import' link associated with the assignment that you wish to refresh the position from. See 'Refreshing Position Information' below for specifics on what happens when you refresh position information.

Changes to 'Add Assignment' Form

- All versions of the old 'Add Assignment' form have been consolidated into one new form that should be easier to use. This form has also been redesigned, with a few changes in functionality.

- Several new fields have been added to the 'Position Information' section: Position Type, Position Term, and Time Basis. Also, in the past the 'Update Employment Status' function on this form sometimes did not save the code successfully; that bug has been corrected.

- The new 'Add Assignment' form will not allow you to add a second current assignment for a position, if a current assignment already exists. You must follow this new rule: One current assignment per position. However, you may enter as many future assignments as you like for a position, as long as the Start & End Dates for each new assignment fall within an available gap period.

- Percent/Hours Employed and Base Salary Schedule (Pay Table) will still be defaulted in from the Position, but are now editable on the 'Add Assignment' form. (You are no longer limited to the position values when assigning Percent/Hours Employed and Base Salary Schedule for the assignment).

- Position Budget Codes that are available are displayed on the 'Add Assignment' form, but you must save the 'Add Assignment' form and be switched over to the 'Edit Assignment' form before you can proceed with adding or modifying assignment budget codes.

New 'Edit Assignment' Form

- All versions of the old 'Modify Assignment' form have been combined into one new 'Edit Assignment' form. This form has changed significantly in Release 5.0.

- Up to this point, you have not been allowed to edit future assignments; you had to remove them, adjust the position and then add the future assignment back. Effective with Release 5.0, you can now edit future assignments on the 'Edit Assignment' form, just like you do current assignments.

- The two Assignment Local Use fields available on the old 'Add Assignment' form have been added to the 'Edit Assignment' form. And more position information has been added to the 'Position Information' section: Position Type, Position Term, and Time Basis. Employment Status Code has also been added to the form, and can be updated.

- Percent/Hours Employed and Base Salary Schedule (Pay Table) are now editable on this form. If you change Percent Employed for a salaried assignment and the system can find matching base budget codes in payroll for that person/position, the sum of percents on those payroll budget codes will be compared to the new Percent Employed value entered. If a discrepancy is about to be created, you will be warned that you may need to request that Payroll update the Percent on their assignment record.

- HR users no longer have the authority to update Base & Supplement Assignment Budget Codes, since they are owned by Payroll and stored in Payroll files. Instead, you will create "requests" using the special 'Budget Code Card' on the Edit Assignment form to request an Add, Change or Delete to payroll budget code information, and then you will send those requests to your Payroll Dept. When Payroll receives these requests from HR, they will update their payroll assignment information at their discretion.

- All position budget codes are included in a 'Position Budget Codes Available' grid on the 'Edit Assignment' form (regardless of whether they have already been used in this assignment), with a 'Use' button on the right side of each row that allows you to open up a 'Budget Code Card' immediately below the grid and create a new assignment budget code record (if it is an Additional Pay budget code) or a Request to Add a new payroll budget code assignment (if it is a Base or Supplement budget code).

- Current Base & Supplement assignment budget codes from Payroll for this employee/position are included in the 'Payroll Budget Codes' grid on the Edit Assignment form. If you wish to request that a payroll assignment record be modified, you will click on the 'Edit' link on the right side of the row showing the assignment that you wish to request a change for, and the 'Budget Code Card' will open up below, where you may enter and submit your change request. You may also request that a particular payroll assignment be deleted by clicking on the 'Delete' link on the right side of the row; the 'Budget Code Card' will open up, where you can enter the effective date of the delete and submit the request. You may also request that a new assignment budget code (that is not included on the position) be added in Payroll by using the 'New Request' link in this section; this will also open up the 'Budget Code Card' where you will enter information about the new assignment and submit the request.

- Important: Creating and Saving a Request for an Add, Change or Delete to Payroll Budget Code Information using this 'Budget Code Card' does NOT result in that request being automatically submitted to your Payroll system. That feature will be added in a future release, but for now you must send these requests to Payroll manually, or have your Payroll Clerk log into the new HRMS Staff Action Console (see notes below) where they can view Requests recently submitted and mark them as Complete once they have posted the changes requested.

- The 'Edit Assignment' form also contains a 'Pending Budget Code Requests' grid that shows all open/pending requests for Adds/Changes/Deletes to payroll budget code information for this employee/position. You may click on any row within this grid to drill down and see more details about the request on the 'Staff Action Request Detail' form.

- You can edit both current and future HRMS Additional Pay assignment budget codes on the 'Edit Assignment' form, since those budget codes are still being stored in HRMS files. Those budget code assignments are displayed in the 'Additional Pay Budget Codes (from HRMS)' grid; clicking on the 'Edit' link will allow you to open up the 'Budget Code Card' where you can edit the field values. You can also add a new Additional Pay assignment budget code that does not exist on the position record, and you can re-use budget codes within an assignment.

- As an added convenience to help you get any remaining HRMS Position Numbers into your payroll assignments, the new Edit Assignment form includes a 'Payroll Budget Codes with Missing/Invalid HRMS Position #s' grid near the bottom of the form. This grid displays all current active assignment budget codes in Payroll that match on SSN but have either no HRMS Position Number or an invalid HRMS Position number in the payroll assignment. This grid will provide you the opportunity to assign the HRMS Position number to each payroll assignment record by entering the position number into the 'New Position #' field. (This will prevent you from having to switch over to the 'Payroll Position # Update Form' to enter the HRMS Position Number).

- At the bottom of the 'Edit Assignment' form, there is a new 'Update Position' button that allows you to refresh position information from current and/or future assignment information. This will enable you to keep your position information in synch with current assignment information. Complete details about what happens when you press this button are included in the next paragraph entitled 'Refreshing Position Information'. Note that this update will be disabled if the 'Allow Update' indicator (shown on the Edit Position form) is turned off, or if there is more than one employee currently assigned to the position.

Removal of Old Position 'View All Assignments' Form

- The old Position 'View All Assignments' form that was accessed through the 'Position' link on the Employee Demographics, Add Assignment and Edit Assignment forms has been removed and replaced with a link to the 'View Position' form. All the information that was included on the old form is included on the new 'View Position' form, so it was no longer needed.

Changes to the 'View Employee Assignment Details' Form

- This form has been modified to show the breakout between the Base & Supplement budget codes coming from Payroll vs. the Additional Pay budget codes coming from HRMS. Open requests for Payroll Assignment Adds/Changes/Deletes are also shown on this form.

- Any payroll assignments for the selected SSN that has a missing or invalid HRMS Position number are shown on this form as well.

Refreshing Position Information

- This is a new function that refreshes HRMS position information and position budget codes with the most recent assignment information, unless the 'Allow Update' indicator is turned off or there is more than one person currently assigned to the position. This new process is run in the following situations:
  - When you run the new 'Remove/Refresh HRMS Position Budget Codes' mass update.
  - When an employee separates from a position and their assignment gets archived.
  - When you change the 'Allow Update' indicator on the Edit Position form from "No" to "Yes", and indicate that you would like to refresh position information from a current assignment.
  - When you click on the 'Update Position' button at the bottom of the 'Edit Assignment' form.

- Following are the steps involved when HRMS position information is refreshed:
  - System deletes old position budget codes.
  - For each payroll assignment base budget code found that matches a current HRMS assignment record (for that position) on SSN & Position Number, the system:

        - Builds a new HRMS base position budget code record.
        - Refreshes a few fields in the HRMS Assignment record:
            - Refreshes Salary Schedule from Payroll base salary schedule.
            - Refreshes Grade from the Grade in the Payroll base budget code, unless it is a Licensed position.
            - Refreshes Step from the Step in the Payroll base budget code.
        - Refreshes a couple of fields in the HRMS Position record:
            - Refreshes Base Salary Schedule from Salary Schedule in Payroll base budget code.
            - Refreshes Grade from Grade in Payroll base budget code, unless it is a Licensed position.
    - For each payroll assignment Supplement budget code found that matches a current HRMS assignment record (on SSN & Position Number), the system builds a new Supplement position budget code record.
    - For each HRMS Additional Pay assignment budget code record that matches a current HRMS assignment record on SSN & Position number, the system builds a new HRMS Additional Pay position budget code record.

New Role for Finance Officer

- A new role for Finance Officer has been added to HRMS. This role will have access to the Reporting Tool, Query Builder, and the new Staff Action Console (see next paragraph). You may want to consider granting this role to some of your Payroll Clerks, so that they may view and/or mark as “Complete” the Requests for Adds, Changes and Deletes to Payroll Information that have been entered by HR users.

New Staff Action Console

- A new Staff Action Console has been created, for the purpose of allowing authorized HR and/or Payroll users to view previously submitted requests for Adds, Changes or Deletes to Payroll Information and/or mark them complete when the updates have been posted. (In a future release, the requests will be sent to Payroll via an automated interface). The following roles have access to this new console: Systems Administrator, Staff Action Clerk, and Finance Officer. Authorized users will access this new console using the following path: Employees → Employee Page → Staff Action Console, or via the Employee Demographics → Consoles → Staff Action. For now, the only Staff Actions accessible on this form are the Requests for Adds/Changes/Deletes to Payroll Information that were created within the ‘Budget Code Card’ on the Edit Assignment form.

- When you open up the new Staff Action Console, the system will display all the “open” Payroll requests that have been created in a large grid. “Open” requests are defined as those with a status of “Submitted”. If you wish to view the requests that have been marked as “Completed”, select the “Completed” option from the ‘Status’ drop-down list at the top of the form. You may view specific details of each request displayed by clicking on a row within the grid; this action will open up the ‘Staff Action Request Detail’ form (see below for more information).

- Users who can access the Staff Action Console will be allowed to change the Status of each request from “Submitted” to “Complete”, by clicking on the ‘Complete’ button on the right side of each row. Normally HR users would expect to use this console to mark each request as complete once Payroll has processed the request. Your LEA may want to consider granting

- permission for your Payroll Clerk(s) to access this HRMS Staff Action Console, so that they may mark requests complete as they process then, rather than having to manually send notification back to your HR Dept. when the requests are completed.

New 'Staff Action Request Detail' Form

- This new form will show you the complete details about an Add/Change/Delete Payroll Information Request that was created by an HR user to communicate with Payroll. It is accessed by clicking on a row on the Staff Action Console, or by clicking on a row within the 'Pending Budget Code Requests' grid on the 'Edit Assignment' form.

- This new form shows the "before" values of the payroll budget code assignment record on the left side of the form, and the "after" (or requested) values on the right side of the form. Fields requested to be changed by HR are highlighted with a red arrow ← beside each field. You also have a link to the 'Employee Assignment Details' form so that you may view detailed information about the HRMS assignment to determine whether the request has been processed by Payroll yet.

Changes to 'License, Assignment and Contract Information' Form

- The grid showing budget codes for the various assignments has been split into two separate grids: one for current active payroll budget codes, and another for HRMS Additional Pay budget codes.

Archiving HRMS Assignments

- When an assignment ends (through separation or transfer to another position), assignment budget codes get archived. The system captures a snapshot of active base & supplement payroll budget codes at that time, along with active HRMS Additional Pay budget codes. The agent also copies those same budget codes to the position budget codes as a reference for the next person hired, unless the position 'Allow Update' indicator is set to "No".

- Effective with Release 5.0, the temporary feature that archived base & supplement budget codes from HRMS assignment budget codes if no match was found in Payroll (on SSN & Position No.) has been removed, since there is no longer any base or supplement assignment budget codes in HRMS to archive from.

Step Mass Updates

- The old 'Employee Step Mass Update' that incremented each employee's base step by 1 is no longer needed. It has been replaced by the 'Refreshing Position Information' process described above. You can perform this synchronization process as often as you like, though you should definitely plan to do this at least once a year, after the fiscal year rolls and Licensure runs their Bump process. To perform this re-synchronization process, proceed to the 'Remove/Refresh HRMS Position Budget Codes' Mass Update form.

- The old 'Assignment Budget Code Step Mass Update' is being retained for Additional Pay budget codes only. (The option to mass update Step on Supplement budget codes is no longer needed since Supplements are stored in payroll.)

Changes to 'Employee Display Form'

- Changes have been made to the 'Position Information' section of this form. Position Number, Primary Indicator, Site, Title & Description have been retained, but all other fields have been removed. If you wish to view salary and budget code information, you may access it via the "Assignment Details" link at the top of the form.

Old 'Payroll Discrepancy' and 'Payroll Information' Views Removed

- The old Payroll Discrepancy and Payroll Information views have been removed because they were obsolete. (There is no longer any need to compare budget codes in HRMS and Payroll now, since HRMS reads Base & Supplement Assignment Budget Codes from Payroll files).

Changes to Frequency of Payment Values

- Prior to Release 5.0, LEAs were allowed to set up LEA-defined Frequency of Payment values (using the LEA Configuration 'Frequency of Payment' form). We are now moving to a standard set of Frequency values in HRMS so that we can calculate supplements for the SS-300 report successfully. Effective with Release 5.0, the capability to create and use locally-defined Frequency values has been removed; the following system-defined HRMS Frequency values are being standardized across all LEAs:
  - M = Monthly
  - A = Annual
  - S = Semi-Monthly
  - 2 = Semi-Annually

- If your LEA is using custom-defined Frequency values that differ from the above-listed codes, you will need to have those old codes converted to one of these standard codes. Please contact Steve Andrew at DPI at 919-807-HELP for assistance with this conversion process.

V4.8.3

Web Reports

- The following web reports were modified:
  - **000011** (Last Few CEU Course IDs Used): Added the column for the new Academic Credit and removed the "Cost" column which is no longer applicable.
  - **800005** (Active Payroll Assignments with Missing/Invalid HRMS Position Numbers): This report no longer references "archived" HRMS position numbers for staff when comparing with the HRMS Position number on the Payroll Assignment records. Therefore staff that have "transferred" to a new position, whose HRMS Position
  - number was NOT updated on their Active Payroll Assignment record, show as an error.
  - **800006** (HRMS Employees Not in Payroll): Report description changed to: "Displays active HRMS employees who have no active Payroll Assignments. IMPORTANT:

Substitute, Mentor, Stipend, Staff Development and Overtime are not considered active Payroll Assignments." The fact that Substitute, Mentor, Stipend, Staff Development and Overtime budget codes are not part of the interface needed to be emphasized.

Staff Actions

- The "SSN" (Change SSN) staff action was failing when the employee had earned CEUs. This Staff Action is now working correctly.

Online Applications

- A new function within HRMS will be implemented on May 7th, 2008. Any online application that has been inactivated will be reactivated if it has been modified within the past 6 weeks, provided it meets the following conditions:
  - The applicant is not an active employee within the LEA
  - The applicant is not on the "Do Not Hire List" within HRMS
  - The application is not marked as Sub-Par.

- If your LEA "Screens" applications, these applications will be reactivated, but "Unreleased" and must be "Released" again. Keep in mind that the Local Web Report - 000006 (Inactive Applications Recently Modified), will still be useful for those applications not meeting the above conditions. This report will be especially useful to reactivate an application from a current employee who is applying for a different position within the LEA.

V4.8

Web Reports

- Four web reports were deleted. For whatever reason, they were cluttering up the list of reports and were never functional. These were:
  - 000007: Employees with Active Status Codes and Employee End Dates for 2005 School Year
  - 000117: CEUS by SSN
  - 000118: GetEmployees
  - 000132: Employee and Assignment Detail

- One web report is now pulling Payroll Budget Code Assignment information that it wasn't before:
  - 000014: National Board Certification Info

Daily Archiving of Position Assignments

- Archiving assignments now includes a snapshot of the position as it existed at the time of archival and all of the Payroll budget code assignments that were associated with the employee and position #. This is in preparation for the removal of all Base and Supplemental budget codes from HRMS.

Data Model Changes

- Lots of data model changes were made to Assignment, Budget Code, and Position tables. See the technical documentation that went out in a separate communication for details.

Query Builder

- New report group added called “Assignment Budget View (Payroll)”. This allows for the creation of SQL queries that can access the new Payroll Budget Code Assignments table. It also includes Employee, Position, Assignment, and Budget Codes all in one place.

V4.7.1

CEU Module Fixes

Renewal Bump Failing

- Bump was updated to reflect new changes in CEU module.

Renewal Credits or Semester Hours must be >0, disabled

- This was disabled to allow tracking of courses with no semester or renewal values.

Assigning a course with a lower case to an employee fails

- When trying to assign a course with a mixed case course code, the search for the course code fails. This has been corrected. Please note that you are no longer allowed to add course codes with lower case characters.

Report Description for Web Report 800006 incorrect

- After selecting Web Report 800006, the Report Description was incorrect. This has been corrected.

V4.7

CEU Module Changes

URL for Lookup My CEU’s has changed

- The hyperlink for “Lookup My CEU’s” is now http://<hrmsserver>/hrms/ceu.nsf/ceuhistory?openpage. If your LEA has a hardcoded link directly to this page, it will have to be changed. Also, anyone with a bookmark for this page will need to edit the URL.

Increase Course Code Length to 8 Characters

- Increased the length of the Course Code Number field from 6 characters to 8 characters

Fix Issue with Lower – and – Mixed – Case Course Codes

- Modified the New Course page to convert and store values as upper case.

Remove Tech Comp Column in Course Management Search Results

- Removed Tech Comp Column from the Course Management Search Results

Change Display of High Quality Indicator in CEU Module

- Changed High Quality Indicator to display as Y for Yes and blank for No throughout the CEU Module.

Add Warning before Deletion on CEU Employee History Page

- Added a warning message, on the CEU Employee History Page, verifying that user truly wants to delete an attendance record.

Add Modified By and Modified Date Columns to CONTINUING_EDUCATION table

- Added Modified By and Modified Date/Time to the HRMSLEA.CONTINUING_EDUCATION table. The following pages update this table:
    - Assign Class
    - Add to Class (single employee)
    - Edit Class
    - All Mass Updates

Modify Date Validation on CEU Course Management Page

- Modified the CEU Course Management Page to require user to enter a 4 digit year. This ensures that the system properly stores the correct century.

Correct Future Period Start Date in CEU Totals Table (Employee History Page)

- Corrected the Future Period Start Date in CEU Totals Table (Employee History Page) to equal Current Period End Date + 1

Mass Update for Single Course fails if there is an apostrophe in the Course Description or Source

- Modified the Mass Update for Single Course to allow an apostrophe in the Course Description or Source fields

Allow 3 decimals in Renewal Credit Amounts

- Renewal credit amounts were expanded to allow 3 decimal places.

Expand CEU Course Title Length

- Expanded Description to allow 75 Characters

Course Management Console – Expand Search Capabilities

- Expanded search results to look at all words in the course description, rather than only searching for match on first word of description. For example, if "Reading" is entered as the Search Value, search results will now include any courses that have "Reading" in the description.

Semester Hours Over 9 Are Not Saved (HEAT #252445)

- The HRMSSHR.CONTINUING_ED_CLS_DOM table structure does not allow more than one non-decimal position in the semester hour field, though the form does not inform the user of that restriction. This change will allow more than one non-decimal position in the semester hour field.

Add CEU credits Greater Than 9.999 Hours

- Ability to add CEUs of more than 9.999 hours, particularly useful for Teaching Assistants. This change prevents LEAs from having to add all the separate classes that a TA may take. This feature allows users to enter these classes in bulk because TAs could be takings any number of different classes not associated with teaching.

Add New License Info to Continuing Ed Employee History form

- Teacher License Codes (program code/status, HQ code, and License Area Code) are added to the "Continuing Education Employee History" page. This information will be helpful when posting credits and ensuring that the person is taking credits applicable to their license area, especially if they are working on credits to satisfy a Provisional license.

Add Position & Desc & Site to Continuing Ed Employee History Form

- This information will be helpful in determining whether a person needs Reading/Literacy Credits.

Allow Partial Attendance Hours when entering CEU Credits

- On the Assign Continuing Education form, added a new check box labeled 'No Credit Awarded'.
- This new check box allows LEAs to enter numbers into the Renewal Credit fields on the form (# Renewal Credits, # NCLB Credits, # Reading Methods Credits, # Principal Credits, etc.) that reflect partial attendance. When the 'No Credit Awarded' check box is checked, however, the employee will receive no actual credit for the class towards calculating their total credits.

Modify CEU Module to Allow Tracking of New Academic Subject Area CEU Credits

- The following changes are needed to the LEA module to allow LEA users to track new Academic Subject Area CEU Credits, as a result of the July 2007 legislative mandate (SB 1292).

- Changes to the CEU Course Template form to allow authorized users to record the new Academic Subject Area renewal credits.
- Modifications to the Assign Continuing Education Class form to allow authorized users to assign the new Academic Subject Area renewal credits.
- Changes to the Continuing Education Employee History form to display the new Academic Area CEU credits for the selected employee.
- Changes to the Course Management Form to allow users to select courses with the new Academic Subject Area credits.
- Add a new feature to allow mass update of selected previously-completed courses to include credit for Academic Subject Area CEUs.

Enhanced Mass Updates for Principal Credits, Reading Credits, and High Quality Indicator

- Mass Update now returns list of classes by Class Code, Description, and Completion Date. Selecting a row brings back a complete list of everyone who took that course on that date, regardless of whether they had previously received that particular type of credit for it or not. LEAs can set credit amount and update each person individually, or perform the update for the entire group based on default value from course template.

Remove NCLB Credits Mass Update Feature

Change Assign Renewals by Site Feature to Include Rather than Exclude Selected Employees

Modify initial sort on Lookup My CEUs to sort by Date Taken (Descending)

- The Lookup My CEUs results were modified to sort by Date Taken or Descending order.

Accommodate Special Characters in the CEU Course Description

- Modified system to accommodate special characters in the Course Description (ceu_desc_text) field

Modify Assign Renewal Form to Allow Entry by Employee ID

- Added a new ‘By Employee ID’ button to the Assign Continuing Education Class form. This new form will allow LEAs to assign CEU courses by Employee ID instead of SSN.

Modify Lookup My CEUs Form to Allow Search by Employee ID

- Modified Lookup My CEUs to include a new Payroll Emp ID text box. This new field will allow the user to lookup their CEU information using their Employee ID rather than their SSN.

Automatically refresh CEU History form after class added

Evaluations

Expanded Comment fields on Evaluation Forms from 250 to 2000 characters

- Comments fields were expanded to 2000 characters. Strengths and Areas for Improvement on the FODA Evaluation remain at 500 characters.

v4.6.5

PTF's and Hot Fixes

- When editing existing Vacancy Announcements, a new one was being created instead of updating the original. We attempted to fix this in 4.6.4. Fixed in this release.
- All staff were not appearing on the Site Assignment Info page. This turned out to be a data issue at the LEA. The POS_CLASS_CD was blank for some assignments.
- Added printable version of Vacancy Management Console accessible via button in top right hand corner of page labeled "Printable Report".
- On License, Assignment, and Contract Info page a new column has been added to the Contract items to display the contract conditions.
- Adding warning (before you enter any data) to the Add/Modify Assignment forms that lets you know if a Termination Date exists.
- Fixed a bug in the Evaluations module where the Rating and Comment item for "Performing Non-Instructional Duties" was not appearing in View/Print.
- Modified "Pick from List" drop down list on Vacancy Management Console to allow selection of Candidates for Active or Inactive Vacancies
- Removed wording on Position Edit form that indicates you can create a position
- Added asterisk (*) to required fields on Coaching/Hobbies page in LEA Configuration.
- Added asterisk (*) to required fields on Contract Conditions page in LEA Configuration.
- Added asterisk (*) to required fields on Contract Types page in LEA Configuration.
- Added asterisk (*) to required fields on Frequency of Payment page in LEA Configuration.
- Added asterisk (*) to required fields on Employee Local Use Fields page in LEA Configuration.
- Added asterisk (*) to required fields on Position Local Use Fields page in LEA Configuration.
- Added asterisk (*) to required fields on Differential Pay page in LEA Configuration.
- Added asterisk (*) to required fields on Position Titles page in LEA Configuration.
- Added asterisk (*) to required fields on Substitute Types page in LEA Configuration.

v4.6.4

PTF's and hot fixes

- Fixed bug where creating an Announcement was using old Vacancy Permits instead of either creating a new one or using a recent/open permit.
- Fixed bug where when creating an Announcement, the text description of the Position Status Code for "School Days Only" was being used, instead of the actual code. This was preventing the Announcement from being created at all (with no error).

v4.6.3

PTF's and hot fixes

ClearQuest ID: HrmsP00004057

- Add new separation status code 77, RES TCH, RESIGNED – END OF TEACH FOR AMERICA TERM
- Updated existing NOT HIRE (54) code to CNTRCT END

ClearQuest ID: HrmsP00004026

- **Issue:** Currently when staff actions occur, emails are sent to Action Notice Recipients and also to anyone in the Site Contact table who is a principal. Only the Action Notice Recipient table should be used to determine if email notifications should be sent.
- **Resolution**: Remarked out "rolemems = getRoleMembers(Con,"P",SessDoc.Site(0))" in the following agents:
  - Agent (StaAddPositionWQSold)
  - Agent (STAModifyPositionWQS)
  - Agent (STADisabilityWQS)
  - Agent (StaAddPositionWQS)
  - Agent (STAModifyAssignmentWQS)
  - Agent (STAGSAssignWQS)
  - Agent (STAGSBudgetWQS)
  - Agent (STALeaveWQS)
  - Agent (STALongevityWQS)
  - Agent (STAChangeSSNWQS)
  - Agent (STADepartWQS)
  - Agent (STADemog451WQS)
  - Agent (DemogWQS - NOT USED)
  - Agent (STABenefitsWQS)
- Changed to 'removed per cq:HrmsP00004026 rolemems = getRoleMembers(Con,"P",SessDoc.Site(0))

ClearQuest ID: HrmsP00004003

- **Issue:** Bogus error message appears when creating a Contract from the NewEmpCnt form from the STANewPosition Form
- **Resolution:** NewEmpContractWQS Agent was attempting to update an empty result set in the updateVacancyXRef Sub Routine. Added a check to validate result set before updating.

ClearQuest ID: HrmsP00003983

- **Issue:** Extending a Leave of Absence does not work. The option to Extend a Leave of Action does not update the ending date. No error message occurs and it says it processes successfully, but date in not updated.
- **Resolution:** Can't recreate, Steve validating. STAExtendLeaveWQS Agent

ClearQuest ID: HrmsP00004014

- **Issue:** When displaying Licensure Data Changes (Employee Page, Views), only display data for active employees at the LEA
- **Resolution:** Updated $$SystemViews agent: Changed SQL_LICCHG$ where clause to include: "AND cast(EMP_STATUS_CD as integer) >0 and cast(EMP_STATUS_CD as integer) <29"

ClearQuest ID: HrmsP00004035

- **Issue:** When a Vacancy is announced or a Vacancy Permit created, the Position Title and Position Description are pulled into the Vacancy from the Position table. When and LEA edits the Position and changes the Title and/or Description, the Title and Description on the Vacancy does not change. These fields are not editable on the Vacancy Permit itself and need to be. Form VacancyPermitEdit. Fields Vac_title_txt, Vac_desc_txt
- **Resolution:** Updated VacancyPermitEdit form to allow editing of these two fields (vac_title_txt, vac_desc_txt) and updated VacancyPermitEditWQS to update the vacancy table. Long term fix should be to update all vacancies when position record is updated/changed.

ClearQuest ID: HRMSP00003736

- **Issue:** Fields are not populating when viewing budget code information from Position - View Only form
- **Resolution:** Fixed mistype in BudgetCodeWinDspWQO

ClearQuest ID: HRMSP00000895

- **Issue:** Phone and Fax for SITEs allows non numerics
- **Resolution:** Added JavaScript validation to fields

v4.6.2

Converted Payroll Views built in v4.6.0 to Tables

- Because Views were being deleted whenever a dependency in one of the Payroll systems was changed, we had to convert from Views to Tables and employ a synchronization scheme to keep the data in a consistent state.

- The following actions were taken:
  - Deleted HRMSLEA.PAYROLL_BUDGET_CODE_ASSIGNMENTS_V
  - Deleted HRMSLEA.PAYROLL_EMPLOYEES_V
  - Deleted HRMSLEA.PAYROLL_EMPLOYEES_NO_POS_V
  - Created Table: HRMSLEA.PAYROLL_BUDGET_CODE_ASSIGNMENTS
  - Created Table: HRMSLEA.PAYROLL_EMPLOYEES
  - Added Synchronization agent to keep two tables populated (runs once an hour)
  - Updated Payroll based Web Reports to use the new tables
    - 800001 - Payroll Employees Not in HRMS
    - 800004 - Active Payroll Assignments with Missing/Invalid HRMS Position Numbers
    - 800005 - HRMS Employees Not in Payroll

Added new excluded purpose codes to HRMSSHR.EXCLUDED_PURPOSE_CODES

- We discovered that we were missing some of the purpose codes that needed to be excluded from the Payroll interface. The following is a list of Object Code, Purpose Code combinations that were added
  - '192','5401'
  - '192','5402'
  - '192','5403'
  - '192','5404'
  - '192','6910'
  - '192','6920'
  - '192','6930'
  - '192','6931'
  - '192','6932'
  - '192','6940'
  - '192','6941'
  - '192','6942'
  - '192','6950'

v4.6.1

Data Model Fixes

- Fixed selection criteria in HRMSLEA.PAYROLL_EMPLOYEES_V for Sartox
- Fixed selection criteria in HRMSLEA.PAYROLL_BUDGET_CODE_ASSIGNMENTS_V for Sartox

v4.6.0

Updated Add Assignment

- Added validation that prevents adding more than one employee to a single Position.

Updated Modify Assignment

- Added validation that presents a warning whenever editing a Position Assignment that applies to a Position filled by more than one employee.

New Views to allow interface between HRMS and Isis/Sartox

- HRMSLEA.PAYROLL_BUDGET_CODE_ASSIGNMENTS_V
- HRMSLEA.PAYROLL_EMPLOYEES_V
- HRMSLEA.PAYROLL_EMPLOYEES_NO_POS_V
- HRMSLEA.BUDGET_CODE_ASSIGNMENTS_V

New Views to consolidate HRMS assignments

- HRMSLEA.POSITION_ASSIGNMENTS_V (Current and Future Position assignments)
- HRMSLEA.BUDGET_CODE_ASSIGNMENTS_V (Current and Future assignment budget codes)

New Tables

- HRMSSHR.OBJECT_CODES (Object codes included in Payroll interface)
- HRMSSHR.EXCLUDED_PURPOSE_CODES (Purpose codes to exclude from certain Object codes)
  - '192','5400'
  - '192','6900'

New Web Reports

- 800001 - Payroll Employees Not in HRMS
- 800002 - Employees with Additional Pay Budget Codes in HRMS
- 800003 - HRMS Positions with Multiple Employees Assigned
- 800004 - Active Payroll Assignments with Missing/Invalid HRMS Position Numbers
- 800005 - HRMS Employees Not in Payroll

v4.5.5

Changed CEU Course Code field from 6 to 8 chars

- Altered HRMSSHR.CONTINUING_ED_CLS_DOM.
- Altered HRMSLEA.CONTINUING_EDUCATION.
- Changed CEU form validation to allow 8 characters.

v4.5.4

Added 9.50 to HRMSSHR.POSITION_TERM_DOM table

v4.5.3

New Payroll HRMS Position # Reconciliation Tool

- A new tool is available that allows the Staff Action Officer, Staff Action Clerk, Payroll, and Sys Admin roles to modify the HRMS Position # directly in Payroll (whether Isis or Sartox)
- The new tool is accessible from the Employee Page - Views - Payroll Position # Update link.
- Once open, use the "Help" link to get detailed instructions on how to use the tool.

Purpose of the Tool

- To allow easy modification of the HRMS Position # field in Payroll. Nothing else.
- This tool is intended to replace the Excel report that was released a couple of weeks ago.

Summary of Capabilities

- Displays the relationship between budget code assignments in Payroll and Position Assignments in HRMS - organized by Employee.
- Has a multitude of ways to slice and dice which Employees you want to look at.
- Will allow you to include Archived Assignments from HRMS in the report.

- If a budget code in HRMS matches up to a budget code in Payroll, they are displayed on the same line.
- If no matching budget code exists, then you will see blank space either on the Payroll or the HRMS side of the tool - and that's fine.
- The object is to enter the correct HRMS Position # in the empty fields and save.

Again, read the Help page carefully to get full details on how to understand what the Tool is providing for you.

v4.5.1

New Home Page

- Right hand column contains random tidbits and current events that pertain to HRMS.

- Top-middle panel contains links to the three primary contacts at the LEA, plus a link to the HRMS support desk. The LEA contacts can be edited by clicking "Edit" in the panel's label or by navigating to Setup - Contacts.
- Updated Menu system: Instead of popping out to the right on mouse over, it now slides down on mouse click. The expandable menu options are now clearly labeled with a down arrow and multiple submenus can be open at one time.

Staff Action Page - Removed

- The old Staff Action Page has been incorporated into the new Employee Page.

Employee Page

- The employee search options have been moved to the Employee Page.
- The page and menu reflect the same styling used on the new Home Page.

New Employee, New Employee w/out Vacancy, and Staff Action Demographics Forms

- New fields have been added to Employee Demographics:
  - Preferred First, Middle, Last names, and Suffix
  - SSN Name Verified Yes/No
  - Foreign National Yes/No
  - Employment Eligibility Expiration date
  - Mentor SSN
- A link to the Substitute page has been added to the right of the Yes/No/Both radio button.

Staff Action Demographics

- The Employee Status now displays a description of the code alongside the code itself.
- The old Staff Action menu has been moved to the top of the page.
- The old alphabetized menu has been reconfigured into 4 submenus labeled "Consoles", "Assignment", "Staff Action", and "Other".
- Three new menu options have been added: "Home", "Employee", and "Switch Employee".

- Switch Employee allows the user to change Staff Action Demographics pages without having to go back to the Employee Page.
- Under View All Assignment Details, a table has been added that displays Assignments as they appear in the Payroll System (whether Sartox or Isis).

Licensure

- A new RLC form group has been added.
- A new RLC form has been added.

License, Assignment, and Contract Information

- A link to the Employee's Renewal Credit's page has been added immediately to the right of the current "Contracts" link.

Mass Updates (New)

- Social Security Name verification. This allows the LEA to label selected Social Security Names as "Verified".
- Copy Payroll Name to Social Security Name.
    - This allows the LEA to see a list of HRMS Social Security Names vs. Payroll Names, matching on Social Security Number where the two names are different.
    - If desired, all names in HRMS can be overwritten.
    - If the Verify option is set to "Yes", then the SSN Verification will be enabled during the overwrite process.
    - Previously Verified names will not be overwritten.

Miscellaneous

- The list of contracts in the drop down list has been fixed so that it sorts from most recent to oldest.
- Under Settings – Contacts, ability to change the contacts for your LEA.
- There was a bug preventing Contract codes from being edited. This is fixed.
- When Adding an Internal Candidate to a vacancy, the form no longer looks like the employee is applying for the job (and thus confusing Principals).
- When copying a Position, Budget Codes are now included in the copying process.
- On the Employee Picker, selecting by SSN uses last digits of number rather than beginning digits like it has in the past.
- Employee Comments are now correctly displayed in chronological order with newest at the top.