


# Atrieve HR Year End Procedures Checklist

Used by Our Team?	Completed?	Action Required
<div><input type="checkbox"/> <b>Assignments</b></div>		
<b>Review Location database fields below</b>		
<b>Navigation:</b> HR Setup & Maintenance > Setup Tables (Databases) > Location > Change		
<div><input type="checkbox"/></div>	<div><b>Bell times</b>  These are the times that the system uses when an employee’s schedule references AMS, AME, PMS, or PME).  <b>Important:</b> After making any changes, be sure to click “<b>Refresh Schedule</b>” so the <b>Schedule Details</b> screen reflects the updated time information.</div>	
<div><input type="checkbox"/></div>	<div><b>Clerk</b>  The <b>Location Clerk</b> field can be used as a selection/filtering criterion on the following reports:<ul style="list-style-type: none"><li>• <b>Authorization Report</b></li><li>• <b>Absence Costing Report</b></li></ul></div>	
<div><input type="checkbox"/></div>	<div><b>Principal</b>  This field identifies the location’s Principal and is used in any product that supports <b>task routing</b>. It also appears in <b>Attendance Management Web</b>, where the Principal’s name is displayed at the top of the screen.</div>	

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<input type="checkbox"/> <b>Assignments</b>		
	<input type="checkbox"/>	<p><b>Email addresses</b></p> <p>These fields are used to support automated communication in several areas:</p> <ul style="list-style-type: none"> <li>• <b>Attendance Management Web</b> reminders</li> <li>• <b>Morning Absence Reports</b> sent via email</li> <li>• <b>Manual Intervention Emails</b> sent directly to schools (when not routed through a central dispatcher)</li> </ul> <p>Ensure these fields are completed to enable proper delivery of system-generated notifications.</p>
	<input type="checkbox"/>	<p><b>Break details tab</b></p> <p>Update block times as needed <b>if you are using</b> the profile listed below:</p> <ul style="list-style-type: none"> <li>• <b>Related Setting:</b> <i>Substitute/Casual Dispatch Parameters Profile &gt; Page 4 &gt; Field: Location Break Times Category List</i></li> </ul> <p>This setting works in conjunction with the <b>Location Break Times</b> defined in the system. To understand how this functionality works or to verify your setup, review the <a href="#">Location Database Maintenance</a> page.</p>
	<input type="checkbox"/>	<p><b>Create new locations</b></p> <p><b>Purpose:</b> If the district has new schools, add the school using the code obtained by the district's finance department.</p> <p> <a href="#">Additional Considerations</a> when adding a location code.</p>

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<input type="checkbox"/> <b>Assignments</b>		
<input type="checkbox"/>		<p><b>Soft-delete old locations</b></p> <p><b>Purpose:</b> Use this process when a school or location has been closed and should no longer be active in the system. Soft-deleting keeps the location in the system for historical reference while preventing it from being used in future transactions.</p> <p><b>Guidance:</b></p> <ol style="list-style-type: none"> <li><b>Change the Status:</b> <ul style="list-style-type: none"> <li>Navigate to the location record.</li> <li>Set <b>Status</b> to <b>“S”</b> (Soft-Deleted).</li> </ul> </li> <li><b>Update the Location Code Type:</b> <ul style="list-style-type: none"> <li>Change the <b>Type</b> to <b>“*”</b> (<b>Do Not Use</b>).</li> <li>This prevents the location from being included in processes like <b>Authorization Week creation</b>.</li> </ul> </li> </ol>
<input type="checkbox"/>		<p><b>Run Ending Assignment Report</b></p> <p><b>Navigation:</b> <i>Assignments &gt; Assignment Reports &gt; Ending Assignment Report</i></p> <p><b>Purpose:</b> This report identifies employees whose assignments are ending within a specified date range <b>and</b> who do <b>not</b> have any future assignments scheduled in the system.</p> <p><b>Key Uses:</b></p> <ul style="list-style-type: none"> <li>Helps track employees whose assignments are ending without a follow-up assignment.</li> <li>Ensures timely action—either by <b>terminating</b> the employee or by <b>creating a new assignment</b>.</li> </ul> <p><b>Additional Feature:</b></p> <ul style="list-style-type: none"> <li><b>Recall Date Filter:</b> Allows you to filter the report by employees who are <b>on or off the recall list</b>, providing more targeted results.</li> </ul>

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<input type="checkbox"/>	<b>HR Report Writer/Dashboard</b>	
	<input type="checkbox"/>	<p><b>Update report dates</b></p> <p><b>Purpose:</b> To ensure that reports reflect the correct school year and avoid manual updates in the future.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Review any reports that contain hardcoded start or end dates for the school year.</li> <li>2. Update those dates to reflect the new year if necessary.</li> <li>3. Whenever possible, replace exact dates with date keywords to make reports more flexible and reduce the need for yearly updates.</li> </ol>
	<input type="checkbox"/>	<p><b>Update date keywords</b></p> <p><b>Navigation:</b> Tools &gt; Security &amp; Setup &gt; User Profile Maint - Tabbed &gt; HRW, FRW, and PRW tabs.</p> <p><b>Purpose:</b> To ensure that reports using date keywords reflect the correct school year.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Open the User Profile Maintenance screen.</li> <li>2. Go to the HRW, FRW, and PRW tabs.</li> <li>3. Update the school year dates used in the date keyword fields to match the new academic year.</li> </ol>

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/> <b>Insights</b>		
	<input type="checkbox"/>	<p><b>Update Start and End of School Year Month and Day</b></p> <p><b>Navigation:</b> Tools &gt; Security &amp; Setup &gt; User Profile Maint - Tabbed &gt; Insights tab.</p> <p><b>Purpose:</b> To ensure that the "My Absences" and "Employee Absences" Power Tiles on the Insights dashboard reflect the correct school year when users select "Current School Year to Date."</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Open the User Profile Maintenance screen.</li> <li>2. Go to the Insights tab.</li> <li>3. Update the Start and End of School Year Month and Day fields to match the new school year.</li> </ol>
<input type="checkbox"/> <b>Absence System / GL's on Assignments</b>		
	<input type="checkbox"/>	<p><b>Update GL validation year</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Profiles &gt; User Specific Parameter Profile</p> <p>The following fields are used in <b>GL validation</b>:</p> <ul style="list-style-type: none"> <li>• <b>Page 1, Field: Current Absence Year</b></li> </ul> <p>Enter the current school year. This value is used in the Absence and Leave application subsystems to determine which entitlement record to reference. It also serves as the default year on various screens and reports, and is used in GL validation during absence and dispatch costing.</p> <ul style="list-style-type: none"> <li>• <b>Page 3, GL Validation Year</b></li> </ul> <p>Enter the year currently used by Payroll. This year is used specifically for validating GL account numbers.</p>

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<b>Employee Experience Report</b>  <input type="checkbox"/> <b>Employee Seniority Report (1204)</b>  <b>Support Staff Seniority Report (1234)</b>		
	<input type="checkbox"/>	<b>Add experience year</b>  <b>Navigation:</b> HR Setup & Maintenance > Setup Tables (Databases) > Experience Year > Add
<input type="checkbox"/> <b>Absence System or Seniority</b>		
	<input type="checkbox"/>	<b>Review Calendars</b>  <b>Navigation:</b> HR Setup & Maintenance > Setup Tables (Databases) > Non Instruction Calendar > Change  <b>Purpose:</b> Set up or update calendars to reflect key dates for the school year. This ensures accurate processing in areas such as absence entry, dispatch costing, and seniority calculations.  <b>Calendar Types to Review and Update:</b> <ul style="list-style-type: none"> <li>• Statutory holidays</li> <li>• District Professional Development</li> <li>• Location Professional Development</li> <li>• Teaching holidays</li> <li>• Position Calendar</li> </ul> <b>Important Notes:</b> <ul style="list-style-type: none"> <li>• Calendars can be updated <b>at any time</b> once they are <b>board-approved</b>.</li> <li>• While it's not necessary to wait until year-end, it's important to <b>review and confirm accuracy</b> during year-end processing.</li> </ul>

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<input type="checkbox"/>	<b>Web Absence Entry</b>	
<input type="checkbox"/>		<p><b>Update date in past for absence entry limit</b></p> <p><b>Navigation:</b> Dispatches &gt; Automated Dispatch Profiles &gt; ADS Profiles &gt; ADS Absence Parameter Profile Menu &gt; Parameter Changes</p> <ul style="list-style-type: none"> <li> <b>Page 3 – Field: ADS Web Absence Entry – Number of Days in Past to Allow</b>            This field controls how far back users can enter absences. You can either:           <ul style="list-style-type: none"> <li>Enter a <b>number of days</b> (e.g., 10) to allow entries that many days in the past, or</li> <li>Enter a <b>specific date</b> in the format <b>YYYYMMDD</b> (e.g., 20240901) to restrict entries before that date.</li> </ul> </li> </ul> <p>For example, to prevent teachers from entering absences before <b>September 1</b> of the current school year, enter <b>20240901</b>.</p>
<input type="checkbox"/>		<p><b>Update date in future for absence entry limit</b></p> <p><b>Navigation:</b> Dispatches &gt; Automated Dispatch Profiles &gt; ADS Profiles &gt; ADS Absence Parameter Profile Menu &gt; Parameter Changes</p> <ul style="list-style-type: none"> <li> <b>Page 3 – Field: ADS Web Absence Entry – Number of Days in Future to Allow</b>            This field sets how far into the future users can enter absences. You can either:           <ul style="list-style-type: none"> <li>Enter a <b>number of days</b> (e.g., 30) to allow entries up to that many days ahead, or</li> <li>Enter a <b>specific date</b> in the format <b>YYYYMMDD</b> (e.g., 20250630) to block entries beyond that date.</li> </ul> </li> </ul> <p>For example, to prevent teachers from entering absences past <b>June 30</b> of the current school year, enter <b>20250630</b>.</p>

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<b>Attendance Management System</b>		
<input type="checkbox"/>	<p>You will know you have <a href="#">AMS</a> if your school administrators have access to the core Atrieve system and they may have the ability to add/change/delete/authorize. Or, depending on the setup, they might just have authorize. This isn't done from the web portal, but from the Atrieve client.</p>	
<input type="checkbox"/>	<p><b>Create authorization weeks</b></p> <p><b>Navigation:</b> Absences &gt; Attendance Authorization (AMS) &gt; Authorization Creation Process</p> <p><b>Purpose:</b> Use this process to create <b>authorization weeks</b>, which are required for absence entry and dispatch processing.</p> <p><b>Guidance:</b></p> <ul style="list-style-type: none"> <li>• If you're unsure where to start, choose a <b>past date</b> that you know has already been created (e.g., <b>June 1</b>). This helps ensure there are <b>no gaps</b> in your week-ending dates.</li> <li>• As long as you <b>don't change the day of the week</b> for the week-ending date (e.g., always use Sunday), the system will <b>not create duplicates</b>.</li> </ul> <p><b>Troubleshooting Tip:</b></p> <p>You may have missed this step if:</p> <ul style="list-style-type: none"> <li>• A school reports an error like: <b>"Invalid week ending date, not in authorization file."</b></li> <li>• Users using the <b>binoculars lookup</b> don't see the expected week-ending date available for selection.</li> </ul>	



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	<input type="checkbox"/>	<p><b>Update accounts with locations, request new accounts</b></p> <p><b>Purpose:</b> Ensure that all users have the correct access to Atrieve, especially for tasks like weekly absence authorization.</p> <p><b>Actions:</b></p> <ol style="list-style-type: none"> <li><b>Submit Support Requests for Account Updates:</b> <ul style="list-style-type: none"> <li>If existing users (e.g., principals, vice-principals, admin assistants) have <b>moved to a new school</b>, submit a request to update their <b>location security</b> in AMS.</li> <li>Requests must come from <b>management</b>.</li> </ul> </li> <li><b>Request New Accounts:</b> <ul style="list-style-type: none"> <li>For any <b>new employees</b> who require Atrieve access (e.g., for weekly authorization), submit a request <b>as early as possible</b>.</li> <li>You will be asked to complete a form. If you already have a copy, you may reuse it—but be prepared to receive an updated version if the form has changed.</li> </ul> </li> </ol>

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<b>Attendance Management Web</b>		
<input type="checkbox"/>	If your school administrators are using Attendance Management Web, they will access it from the web and see a screen like this. Instead of being able to manipulate the absences/dispatches, they must submit comments instead.	
<input type="checkbox"/>	<p><b>Create authorization weeks</b></p> <p><b>Navigation:</b> Absences &gt; Attendance Authorization (AMS) &gt; Authorization Creation Process</p> <p><b>Purpose:</b> Use this process to create <b>authorization weeks</b>, which are required for absence entry and dispatch processing.</p> <p><b>Guidance:</b></p> <ul style="list-style-type: none"> <li>• If you're unsure where to start, choose a <b>past date</b> that you know has already been created (e.g., <b>June 1</b>). This helps ensure there are <b>no gaps</b> in your week-ending dates.</li> <li>• As long as you <b>don't change the day of the week</b> for the week-ending date (e.g., always use Sunday), the system will <b>not create duplicates</b>.</li> </ul> <p><b>Troubleshooting Tip:</b></p> <p>You may have missed this step if:</p> <ul style="list-style-type: none"> <li>• A school reports they are seeing <b>“no dates”</b> in the date drop-down menus.</li> </ul>	

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<b>Attendance Management Web</b>		
<input type="checkbox"/>	<p>If your school administrators are using Attendance Management Web, they will access it from the web and see a screen like this. Instead of being able to manipulate the absences/dispatches, they must submit comments instead.</p>	
<input type="checkbox"/>	<p><b>Create daily review records</b></p> <p><b>Navigation:</b> Absences &gt; Attendance Authorization (AMS) &gt; Daily Absence/Dispatch Review Record Creation</p> <p><b>Purpose:</b> This process creates daily records used for reviewing absences and dispatches. These records are essential for proper functioning of Attendance Management Web.</p> <p><b>Guidance:</b></p> <ul style="list-style-type: none"> <li>• If you're unsure where to start, choose a <b>past date</b> that you know has already been created (e.g., <b>June 1</b>).</li> <li>• The system will <b>not create duplicates</b> if you select dates that already exist.</li> <li>• This helps ensure there are <b>no gaps</b> in your week-ending dates.</li> </ul> <p><b>Troubleshooting Tip:</b></p> <p>You may have missed this step if:</p> <ul style="list-style-type: none"> <li>• A school reports they are seeing <b>“no dates”</b> in the date drop-down menus.</li> </ul>	

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<b>Attendance Management Web</b>		
<input type="checkbox"/>	If your school administrators are using Attendance Management Web, they will access it from the web and see a screen like this. Instead of being able to manipulate the absences/dispatches, they must submit comments instead.	
<input type="checkbox"/>	<p><b>Mark weekends/stats as reviewed</b></p> <p><b>Navigation:</b> Absences &gt; Attendance Authorization (AMS) &gt; Daily Absence/Dispatch Review Record Mass Update</p> <p><b>Purpose:</b> Use this process to automatically mark specific days (e.g., weekends or stat holidays) as <b>reviewed</b>, so schools don't have to manually review them.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. After creating your <b>Daily Review Records</b>, run the <b>Mass Update Review Status</b> process.</li> <li>2. In the <b>Day Type to Update</b> field, choose one of the following options: <ul style="list-style-type: none"> <li>○ <b>S</b> – Stat holidays only</li> <li>○ <b>W</b> – Weekends only</li> <li>○ <b>B</b> – Both weekends and stat holidays</li> <li>○ <b>A</b> – <i>All days</i> (not recommended, as it marks every day as reviewed)</li> </ul> </li> </ol> <p><b>Tip:</b> Avoid using option <b>A</b> unless you are certain all days should be marked as reviewed.</p>	

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<input type="checkbox"/>	<b>Automated Dispatch System &amp; Workboard</b>	
	<input type="checkbox"/>	<p><b>Put ADS to sleep for the summer</b></p> <p><b>Navigation:</b> Dispatches &gt; Automated Dispatch Profiles &gt; Automated Dispatch Profiles &gt; ADS Profiles &gt; ADS Group Profile Report (Use this report to identify your dispatch groups, then go to <i>ADS Group Profile</i> to make changes.)</p> <p><b>Purpose:</b> Temporarily disable automated dispatching during the summer months.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Identify the relevant <b>dispatch groups</b> using the <b>ADS Group Profile Report</b>.</li> <li>2. In the <b>ADS Group Profile</b>, update the <b>callout times</b> for each group you want to pause: <ul style="list-style-type: none"> <li>○ Set <b>Callout Start Time</b> and <b>End Time</b> to <b>2400–2400</b>.</li> <li>○ This effectively disables callouts without affecting callbacks or other settings.</li> </ul> </li> </ol> <p><b>Important: Do not</b> change the field <b>“Disable Disp Call Outs While Enabling Call Backs”</b>. This field should <b>always remain set to “N”</b>, even if other documentation suggests otherwise.</p>

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<input type="checkbox"/> <b>Automated Dispatch System &amp; Workboard</b>		
	<input type="checkbox"/>	<p><b>Run the ADS name recording status update</b></p> <p><b>Navigation:</b> Dispatches &gt; Automated Dispatch Utilities &gt; Maintenance Utilities &gt; Name Recording Status Update</p> <p><b>Purpose:</b> Refresh the system flag that indicates whether an employee has recorded their name in ADS.</p> <p><b>Why it Matters:</b></p> <ul style="list-style-type: none"> <li>This status is displayed on the following reports: <ul style="list-style-type: none"> <li><b>Replacement Employee Availability Report</b></li> <li><b>Substitute/Casual Call Out Report</b></li> </ul> </li> <li>Keeping this information up to date ensures accurate reporting and helps identify employees who still need to complete their name recording.</li> </ul> <p><b>Tip:</b> Run this utility periodically, especially before the start of a new school year or major dispatch cycle.</p>
	<input type="checkbox"/>	<p><b>Run the refusal count reset process</b></p> <p><b>Navigation:</b> Dispatches &gt; Refusals &gt; Refusal Count Reset Process</p> <p>Each time a replacement refuses an assignment; their refusal count is increased by one. The system uses this count to determine when a replacement should be marked as inactive.</p> <p>The refusal limit is set in the ADS Group Profile. To review or update this setting:</p> <ol style="list-style-type: none"> <li>Go to Dispatches &gt; Automated Dispatch Profiles &gt; Automated Dispatch Profiles &gt; ADS Profiles.</li> <li>Run the ADS Group Profile Report to identify the relevant groups.</li> <li>When ready to make changes, open the ADS Group Profile.</li> <li>On Page 1, locate the field labeled “Number of Refusals Before Rep Employee Becomes Inactive” and update as needed.</li> </ol>

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<input type="checkbox"/>	<b>Automated Dispatch System &amp; Workboard</b>	
	<input type="checkbox"/>	<p><b>Review replacement employee preferences</b></p> <p><b>Navigation:</b> Dispatches &gt; Substitute/Casual Preferences &gt; Preference Report</p> <p><b>Purpose:</b> Ensure that replacement employees (e.g., substitutes or casual staff) have up-to-date <b>preferences</b> and <b>qualifications</b> in the system.</p> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>• Run the <b>Preference Report</b> to review current settings.</li> <li>• Make any necessary updates using: <ul style="list-style-type: none"> <li>○ <b>Quick Entry Screen</b>, or</li> <li>○ <b>Preference Changes</b> screen.</li> </ul> </li> </ul> <p><b>Efficiency Tips:</b></p> <ul style="list-style-type: none"> <li>• Consider creating a <b>dashboard report</b> to share with replacement employees, showing their current preferences and qualifications.</li> <li>• You can also allow employees to <b>update their own preferences</b> using <b>HR Workflows</b>, with <b>approval routing</b> if required.</li> </ul>

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<input type="checkbox"/>	<b>Automated Dispatch System &amp; Workboard</b>	
	<input type="checkbox"/>	<p><b>Review phase 1 &amp; 2 lists</b></p> <p><b>Navigation:</b> Dispatches &gt; Automated dispatch Profiles &gt; Search Parameters &gt; Search Phases &gt; Phase One and Two Maintenance</p> <p><b>Purpose:</b> Ensure that only appropriate employees are prioritized in <b>Phase 1</b> and <b>Phase 2</b> of the dispatch process.</p> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>• Review both <b>Phase 1</b> and <b>Phase 2</b> lists.</li> <li>• <b>Remove</b> any employees who should no longer receive priority dispatching.</li> </ul> <p><b>Important:</b> Your Phase 1 list might be generated automatically based on seniority. If you know this is the case or if you see a large number of employees listed, do not make any changes without first consulting PowerSchool Support.</p>
	<input type="checkbox"/>	<p><b>Review permanent preferred replacement lists</b></p> <p><b>Navigation:</b> Dispatches &gt; Employee search Criteria &gt; Criteria Changes</p> <p><b>Purpose:</b> To ensure that permanent preferred replacement lists are accurate and up to date.</p> <p><b>Optional Actions:</b></p> <ul style="list-style-type: none"> <li>• Create a report using HR Report Writer to review existing data using the PERM_EMP_SEARCH_CRITERIA table and REQUESTED_EMP_##_NAME fields. Use the SECURITY_EMPLOYEE_NO from NAME_AND_SIN table in selection fields to secure by employee</li> <li>• Place the report on employee dashboards so they can review their own lists and make requests for changes if needed.</li> </ul> <p><b>Efficiency Tip:</b></p> <ul style="list-style-type: none"> <li>• If you use HR Workflows, allow employees to update their own preferred substitute list, with optional approval if needed.</li> </ul>



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<b>Routing Products:</b> <ul style="list-style-type: none"> <li>• Schedule Entry Web</li> <li>• Leave Management Web</li> <li>• Staffing Requisition Web</li> <li>• HR Workflows</li> <li>• Occupational Health &amp; Safety</li> </ul>		
	<input type="checkbox"/>	<p><b>Review location authorizers</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; E-Forms &gt; Routing Authorizer Codes</p> <p><b>Purpose:</b> Ensure that task routing remains accurate by reviewing and updating authorizer assignments, especially those tied to specific employees.</p> <p><b>Key Points:</b></p> <ul style="list-style-type: none"> <li>• Some authorizers may be linked to a <b>specific employee number</b> rather than a <b>position code</b>.</li> <li>• If any of those employees <b>change roles</b> or <b>leave the district</b>, the authorizer setup must be updated to avoid routing issues.</li> </ul> <p><b>Recommended Reports:</b></p> <p>There are a couple of reports available on the <a href="#">PowerSchool Community</a> - to help with this process.</p> <ol style="list-style-type: none"> <li>1. <b>Review Task Authorizers – Year End Process</b> <ul style="list-style-type: none"> <li>○ Identifies authorizers set up by <b>employee number</b>.</li> </ul> </li> <li>2. <b>Routing Detail – Year End Process</b> <ul style="list-style-type: none"> <li>○ Shows which <b>form types or products</b> (e.g., Leave Management, HR Workflows) are using each authorizer code.</li> <li>○ Use this report to determine if a code is shared across multiple products and <b>coordinate changes</b> with the appropriate teams.</li> </ul> </li> </ol>

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<input type="checkbox"/>		<p><b>Review authorizers based on employee numbers</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; E-Forms &gt; Location Authorizers</p> <p><b>Purpose:</b> Ensure that location-based authorizers are still valid, especially if they are tied to specific employee numbers.</p> <p><b>Key Points:</b></p> <ul style="list-style-type: none"> <li>• In addition to general authorizer codes, your district may have <b>location-specific authorizers</b> assigned by <b>employee number</b>.</li> <li>• This setup is most commonly used in <b>Schedule Entry Web</b>.</li> <li>• If any of these employees have <b>changed roles</b> or <b>left the district</b>, the authorizer records should be reviewed and updated accordingly.</li> </ul>

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<b>Routing Products:</b>		
<input type="checkbox"/> <ul style="list-style-type: none"> <li>• Schedule Entry Web</li> <li>• Leave Management Web</li> <li>• Staffing Requisition Web</li> <li>• HR Workflows</li> <li>• Occupational Health &amp; Safety</li> </ul>		
<input type="checkbox"/>		<p><b>Review supervisor report</b></p> <p>Navigation: HR &gt; Reporting &gt; HR Report Writer (New) &gt; Task Reports &gt; Supervisor Report</p> <p><b>Purpose:</b> Ensure that all employees have a correctly assigned <b>supervisor</b> for the new school year. This is critical for <b>task routing</b>, such as <b>leave approvals</b> and <b>expense approvals</b>.</p> <p><b>When to Run:</b> After all new year assignments have been entered.</p> <p><b>What to Check:</b></p> <ul style="list-style-type: none"> <li>• Each employee has a <b>calculated supervisor</b>.</li> <li>• The <b>correct supervisor</b> is assigned based on their current assignment.</li> </ul> <p><b>Tip:</b> Verifying this now helps prevent routing errors in systems that rely on supervisor relationships.</p>

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Job Posting Module/Job Posting Web</b>	
	<input type="checkbox"/>	<p><b>Set up new year for job posting</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Setup Tables(Databases) &gt; Posting Segment 02 (or whichever segment number you use for school year) &gt; Add</p> <p><b>Purpose:</b> To create a new school year entry in the Posting Segment database so it can be selected when adding job postings.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. In the Posting Segment database code, create a new entry for the upcoming school year.</li> <li>2. Use the lookup feature to review how previous years were formatted.</li> <li>3. Follow the same format to maintain consistency across years.</li> </ol>
	<input type="checkbox"/>	<p><b>Set up new year as default</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; System Setup &gt; Web Application Setup &gt; Web Screen Changes</p> <p><b>Purpose:</b> To update the default school year that appears on the web application for job postings.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Update the B1, B2, and B3 web screens if applicable. These correspond to Teaching, Support, and Other application types.</li> <li>2. In each screen, update the Posting Number Segment 2 Year field to reflect the new default year you want to appear on the web.</li> </ol>

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Job Posting Module/Job Posting Web</b>	
	<input type="checkbox"/>	<p><b>Set up posting number segment (Job Posting Web only)</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Setup Tables (Databases) &gt; Posting Segments &gt; Change &gt; select the segment associated with school year (e.g. Segment 02)</p> <p><b>Purpose:</b> To set the default school year that will automatically appear when adding new job postings.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. In the selected segment, locate the field labeled Default Value.</li> <li>2. Enter the appropriate year in this field.</li> <li>3. This value will automatically populate when using Job Posting Additions.</li> </ol>
<input type="checkbox"/>	<b>Staffing Requisition</b>	
	<input type="checkbox"/>	<p><b>Update automatic job posting prefix</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; E-Forms &gt; Form Initiation Code &gt; Form Initiation Code Changes</p> <p><b>Purpose:</b> To update the prefix used in automatically generated job posting numbers for the new school year.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Select the E-Form type labeled STAFF REQ.</li> <li>2. Go to Page 5 of the form setup.</li> <li>3. In the field for Posting Auto Number Prefix, update the year portion to reflect the new school year.</li> <li>4. Keep the letter portion of the prefix unchanged. For example, if the current prefix is T2425, update only the numbers and keep the T.</li> </ol>

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Job Posting Module/Job Posting Web</b>	
	<input type="checkbox"/>	<p><b>Set up new default posting and closing dates</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; E-Forms &gt; Form Initiation Code &gt; Form Initiation Code Changes</p> <p><b>Purpose:</b> To update the default posting and closing dates that appear when initiating a staffing requisition.</p> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Select the E-Form type labeled STAFF REQ.</li> <li>2. Go to Page 5 of the form setup.</li> <li>3. Update the default posting and closing dates as needed.</li> <li>4. These fields may be left blank if no default dates are required.</li> </ol>
<input type="checkbox"/>	<b>Certificates</b>	
	<input type="checkbox"/>	<p><b>Check for expired certificates</b></p> <p><b>Navigation:</b> Demographics &gt; Certifications and Training &gt; Certificates &gt; Certification Report</p> <p><b>Purpose:</b> This report allows you to extract certification records based on <b>expiry date</b> (e.g., August 31, 2025), helping you identify employees with upcoming expirations.</p> <p><b>Alternative Options:</b></p> <ul style="list-style-type: none"> <li>• Use <b>HR Report Writer</b> to create a custom report.</li> <li>• Use the <a href="#">Insights – Certificates Expiring Power Tile</a> for a quick visual overview.</li> </ul>

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Evaluations</b>	
	<input type="checkbox"/>	<p><b>Mass Supervisor update</b></p> <p><b>Navigation:</b> Demographics &gt; Evaluations and Discipline &gt; Evaluation Supervisor Mass Update</p> <p>or: Demographics &gt; Evaluations and Discipline &gt; Evaluation Changes to manually change evaluation supervisors.</p> <p><b>Purpose:</b> This module allows you to replace a specific supervisor with another across all incomplete evaluations. You can run the process in preliminary (preview) mode to review the changes before applying them.</p>

## Lesser Used Product Areas

The following tasks relate to product areas that are used less frequently. Review only if applicable to your site or role.

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Allocations</b>	
	<input type="checkbox"/>	<p><b>Update current absence year</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Profiles &gt; User Specific Parameter Profile</p> <ul style="list-style-type: none"> <li> <b>Page 1 – Field: Current Absence Year</b>  Enter the current school year (e.g., 2024). This field is used by the Absence and Leave application subsystems to determine which entitlement record to reference. It also serves as the default year on many screens and reports, and is used in GL validation during absence and dispatch costing. </li> </ul> <p><b>Purpose:</b></p> <ul style="list-style-type: none"> <li>There is <b>no harm</b> in filling it out annually, even if you're not using these features.</li> <li>The <b>Allocation module</b> uses this year as a default when running reports in Atrieve or during the FTE Allocation Import process. This value <b>can be overridden</b> if needed.</li> </ul> <p><b>Important Notes:</b></p> <ul style="list-style-type: none"> <li>If you <b>are not using PRM absence entitlements</b>, you can update this field when you're ready to load or report on new allocations.</li> <li>If you <b>are using PRM entitlements, do not update</b> this field until you're ready to begin using the next year's absence entitlements.</li> </ul>
	<input type="checkbox"/>	<p><b>Copy and update new allocations</b></p> <p><b>Navigation:</b> Assignments &gt; FTE Allocation &gt; Year To Year Copy</p> <p>Make changes as needed.</p>



Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Absences using PRM Entitlements</b>	
	<input type="checkbox"/>	<p><b>Update current absence year</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Profiles &gt; User Specific Parameter Profile</p> <ul style="list-style-type: none"> <li>Page 1 – Field: Current Absence Year</li> </ul> <p><b>Purpose:</b></p> <ul style="list-style-type: none"> <li>This value is used by the Absence and Leave application subsystems to determine which entitlement record to reference. It also serves as the default year on many screens and reports. Additionally, this year is used during GL validation for absence and dispatch costing.</li> <li><b>Action</b> Enter the current school year (e.g., 2025).</li> </ul>
	<input type="checkbox"/>	<p><b>Update HR Entitlements</b></p> <p><b>Navigation:</b> Absences &gt; Entitlements &gt; <a href="#">Entitlement Creation Process</a></p> <p><b>Note:</b> This step is only required if your absence codes use <b>Entitlements</b> rather than <b>Payroll Storage Banks</b>. This is <b>not</b> the same as Leave Management event or year limits.</p> <p>To confirm whether entitlements are used:</p> <ul style="list-style-type: none"> <li>Check the <b>Source</b> field in the Absence Code database.</li> <li>If the Source is set to <b>"P"</b> (for Payroll), entitlements are being used and you should proceed with creating new year values for employees.</li> </ul> <p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>Run the <b>Load Used Process</b> to capture used entitlement amounts.</li> <li>Run the <b>Carry Over Load Process</b> to transfer remaining entitlement balances into the new year.</li> </ol>

Used by Our Team?	Completed?	Action Required
<input type="checkbox"/>	<b>Transfer Module</b>	
	<input type="checkbox"/>	<p><b>Update employee transfer request year</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Profiles Menu &gt; User Specific Parameter Profile</p> <ul style="list-style-type: none"> <li> <b>Page 2 – Field: Employee Transfer Request Year</b>            Complete this field if your organization uses the <b>Employee Transfer Request Menu</b>.         </li> </ul> <p>This year value is automatically applied when adding, changing, or deleting transfer requests for the selected year. To work with a different year in these programs, you must update this field in the profile.</p>
<input type="checkbox"/>	<b>Draw Time</b>	
	<input type="checkbox"/>	<p><b>Update current school draw time year</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Profiles Menu &gt; User Specific Parameter Profile</p> <p><b>Page 1, Field:</b> Current School Draw Time Year</p> <p>Fill in if the Location Draw time menu if you are using the draw time module to track additional allocated time for non-teaching staff.</p>
	<input type="checkbox"/>	<p><b>Draw time additions</b></p> <p><b>Navigation:</b> HR Setup &amp; Maintenance &gt; Setup Tables (Databases) &gt; Location Draw Time Maintenance &gt; Add</p>