

Sonoma County Office of Education

Employee Portal Report Attachments



Documents

August 2022

Reports Supported in Portal

- Employee10 - Employment Notification Letter
- Employee11 - Compensation Letter
- Employee13 - TB Expiration Letters
- Employee15 - First Aid Expiration Letters
- Employee16 - CPR Expiration Letters
- Employee18 - Driver License Expiration Letters
- Employee81 - Employment Verification
- Employee99 - Employee Snapshot
- Benefit40 - Open Enrollment Letter

For more information follow this link to the Escape Online documentation for [Documents Setup](#) (must be logged into Escape database to access link)

Employee Portal – Employee Attachments

Save time and money!! Districts can now send attachments through the Employee Portal for Benefits and Employee Reports. No need to print reports and spend time stuffing envelopes and cost on postage.

This activity can be processed through Employee Management or Employee Attachments.

1. Go to HR/Payroll – Employment – Employee Management

-OR-

2. Go to HR/Payroll – Processes – Mass Changes – Employee Attachments

Create Employee List in Employment Management

In Employee Management there is more flexibility as to the groups that attachments can be sent to. List of employees can be created by using the search criteria, such as Bargaining Unit. This option is good when testing a small group of employees. If sending to all employees with access to the employee portal, use the Employee Attachment activity.

Go to HR/Payroll – Employment – Employee Management

- Select the Search Criteria to create a list of employees

Example:

Section 1 - Demographics

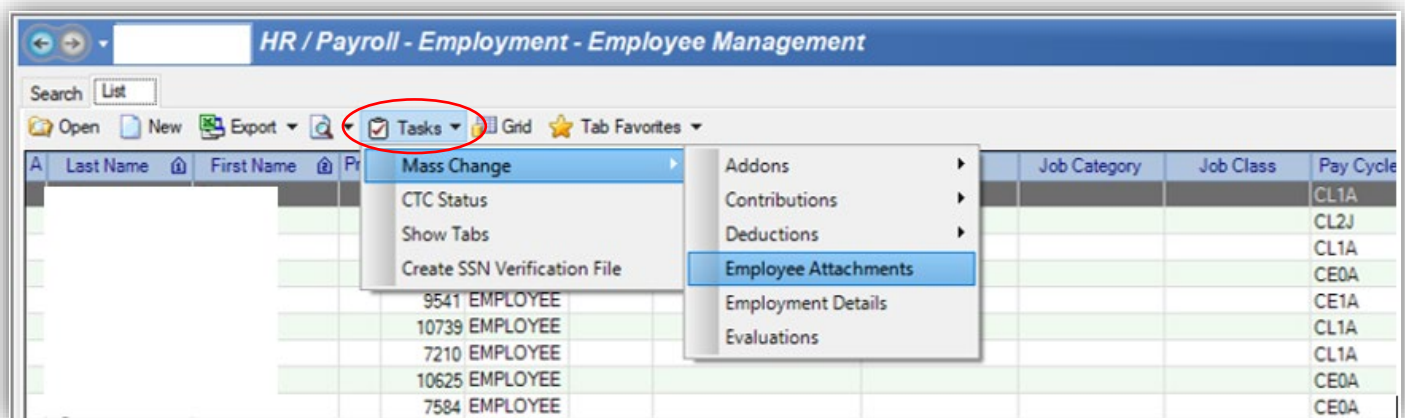
- Employment Status: EM {Employee}
- Active Employees: Yes

Section 4 – Assignments

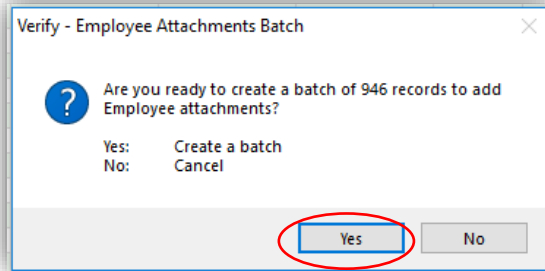
- Fiscal Year: 20XX {20XX/20XX}
- Bargaining Unit: Select from menu

- Click Go to create the list
- Review the list
- Go to Tasks to select Mass Change
- Select Employee Attachments

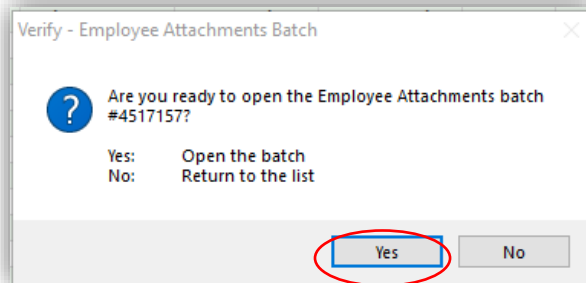
Recommend to select by bargaining unit and alpha to create smaller groups so the activity doesn't time out when sending the email with attachment.



- Click Yes to Create a Batch



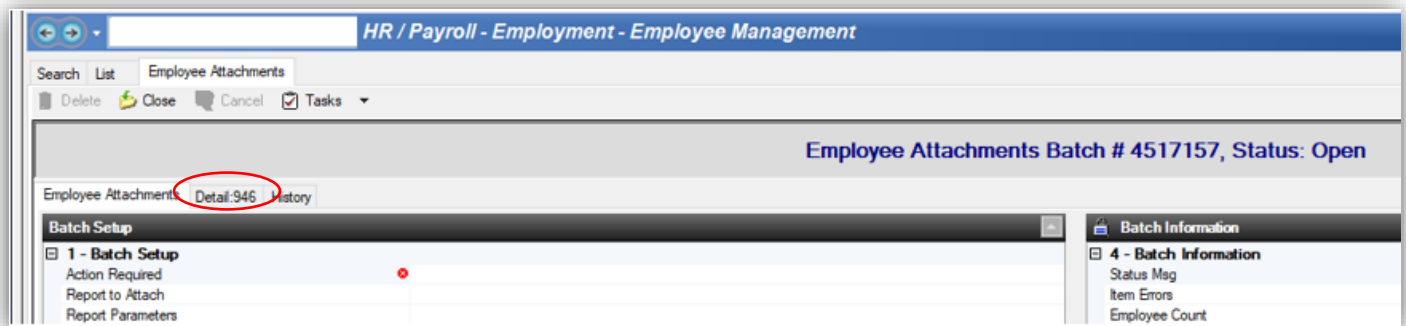
- Click Year to Open the Batch



This will bring you to Employee Attachment Batch in Open Status

- Complete the required fields

The Detail Tab will be the same list of employees from the search criteria.



From here, it's the same process as
HR/Payroll – Processes – Mass Changes - Employee Attachments
See Next page

Create New Batch Employee Attachments Activity

Go to HR/Payroll – Processes – Mass Changes – Employee Attachments

- Click New to create a batch

Action Required: Select the option that is needed from the menu. Depending on the selection, the employee may or may not need to take action in the Employee Portal.

- Acknowledgement NOT required
- Acknowledgement required
- Agree/Disagree

HR / Payroll - Processes - Mass Changes - Employee Attachments

Search List Form

Delete Prev Next Save/Close Cancel Tasks

Employee Attachments

Employee Attachments Detail History

Batch Setup

1 - Batch Setup

Action Required

Report to Attach

Report Parameters

File Name

View File

Category

Attach/Portal Doc Comment

Note

2 - Emails

Sched Date and Time

Email Subject

Email Body

Action Required

Description

Acknowledgement NOT required

Acknowledgement required

Agree/Disagree

Attach File or Report: Attach File In File Name field locate a custom letter to attach

Employee Attachments Detail History

Batch Setup

1 - Batch Setup

Action Required

Report to Attach

Report Parameters

File Name

View File

Category

Attach/Portal Doc Comment

Note

2 - Emails

Sched Date and Time

Email Subject

Email Body

Acknowledgement required

Update Emergency Contact Information

EMP INFO {Employee Information}

Update Employee Emergency Contact Information

TEST

Report to Attach: Select from the list of Reports from the menu

Batch Setup

- ☒ **1 - Batch Setup**
 - Action Required
 - Report to Attach**
 - Report Parameters
 - File Name
 - View File
 - Category
 - Attach/Portal Doc Comment
 - Note
- ☒ **2 - Emails**
 - Sched Date and Time
 - Email Subject
 - Email Body
- ☒ **3 - Followup Emails**
 - Followup Sched Date and Time
 - Email Followup Subject
 - Email Followup Body

Report to Attach

Code	Description
Benefit40a	Open Enrollment Letter/Export
Benefit40b	Open Enrollment Letter/Export
Benefit40x	Open Enrollment Letter/Export
Employee10a	Employment Notification
Employee10b	Employment Notification
Employee11a	Compensation Letter
Employee13a	TB Expiration Letters
Employee13b	TB Expiration Letters
Employee15a	First Aid Expiration Letters
Employee16a	CPR Expiration Letters
Employee18a	Driver License Expiration Letters
Employee21a	Employee Issued Asset Agreement
Employee21b	Employee Issued Asset Agreement
Employee21c	Employee Issued Asset Agreement
Employee21x	Employee Issued Asset Agreement
Employee81a	Employment Verification
Employee99a	Employment Snapshot

Example for Employee10 Employment Notification

Complete the Report Fields

- Use the Note field to Identify the Attachment sent for History and searching

HR / Payroll - Processes - Mass Changes - Employee Attachments

Search List Form

Delete Prev Next Save/Close Cancel Tasks

Employee Attachments Batch # , Status:

Batch Setup

- ☒ **1 - Batch Setup**
 - Action Required
 - Report to Attach
 - Report Parameters
 - File Name
 - View File
 - Category
 - Attach/Portal Doc Comment
 - Note
- ☒ **2 - Emails**
 - Sched Date and Time
 - Email Subject
 - Email Body
- ☒ **3 - Followup Emails**
 - Followup Sched Date and Time
 - Email Followup Subject
 - Email Followup Body

Batch Information

- ☒ **4 - Batch Information**
 - Status Mag
 - Item Errors
 - Employee Count
 - Emails Sent
 - Sent By
 - Email Status
 - Followup Sent
 - Followup By
 - Email Followup Status
- ☒ **5 - Add/Update Information**
 - Created By
 - Create Date
 - Edit User
 - Edit Date

Batch Setup

- ☒ **1 - Batch Setup**
 - Action Required
 - Report to Attach
 - Report Parameters
 - File Name
 - View File
 - Category
 - Attach/Portal Doc Comment
 - Note
- ☒ **2 - Emails**
 - Sched Date and Time
 - Email Subject
 - Email Body
- ☒ **3 - Followup Emails**
 - Followup Sched Date and Time
 - Email Followup Subject
 - Email Followup Body

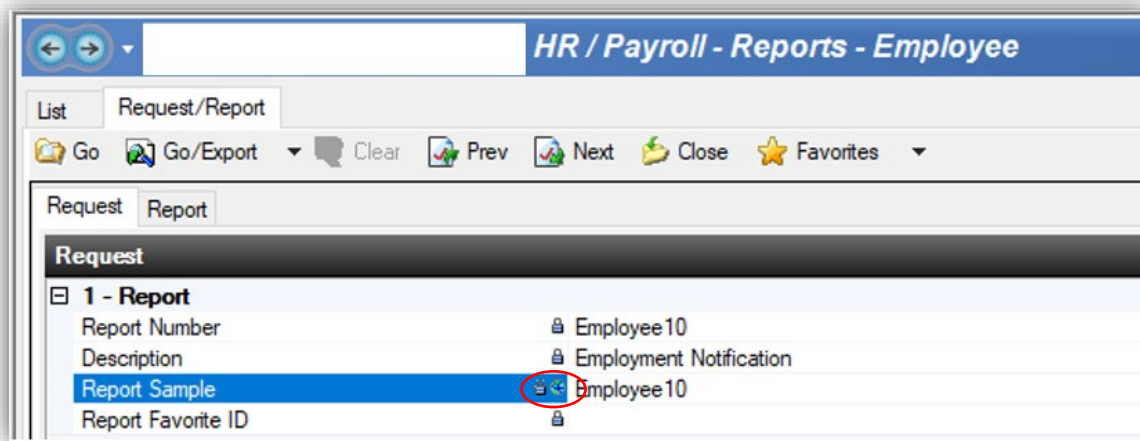
Batch Information

- ☒ **4 - Batch Information**
 - Status Mag
 - Item Errors
 - Employee Count
 - Emails Sent
 - Sent By
 - Email Status
 - Followup Sent
 - Followup By
 - Email Followup Status
- ☒ **5 - Add/Update Information**
 - Created By
 - Create Date
 - Edit User
 - Edit Date

Report Parameters

Go to HR/Payroll- Reports-Employee-Employee10

- Click on the link in the Report Sample field to get the Report Parameters



Locate the Sample Parameters in the Report Sampler Documentation

Copy the Sample Parameters to Paste in the Report Parameters field

Report Parameter Tips

- EOL_DateEffective - This defaults to TODAY. If you want to run this for a future fiscal year, set it to a date in the future fiscal year. For example, it is June and you want to send this out over the summer. You could set the date to 10/1.
- EOL_Cred - This defaults to exclude credentials. If you want to include credentials, set to Y.
- EOL_MoByFTE - This defaults to show the full time monthly rate. If you want to prorate the monthly rate by FTE, set to Y.
- EOL_AddonDesc - This defaults to the organization addon setup description. If you want to show the description from the employee's addon, set to P.

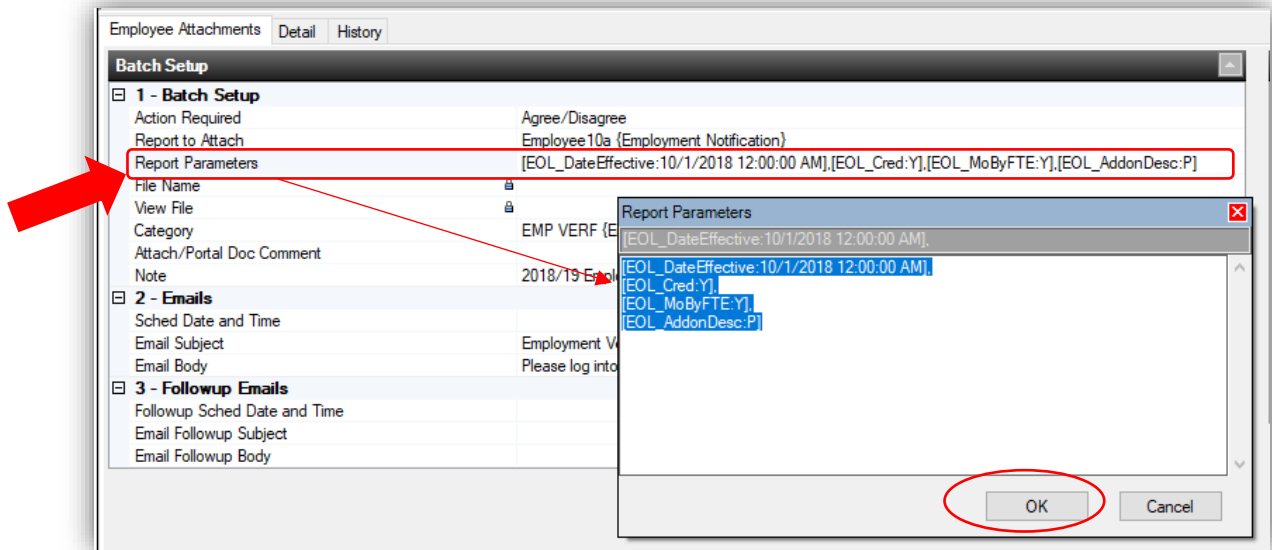
Sample Parameters

[EOL_DateEffective:10/1/2016 12:00:00 AM],
[EOL_Cred:Y],
[EOL_MoByFTE:Y],
[EOL_AddonDesc:P]



Return to the Employee Attachments

- Click on the Menu button to Open the Report Parameters Text Box
- Paste in the Report Parameters Field
- Edit the date and use the Report Parameter Tips for options
- Click OK when done



Email Subject

Complete this field. This will be the email subject line that the employee will receive.

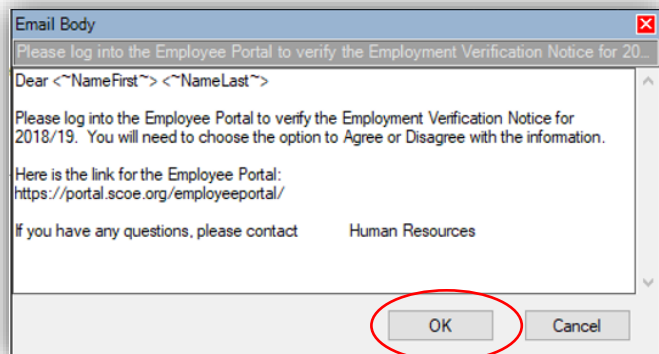
Example Email Subject: 2018/2019 Employment Verification Notice

Email Body

Complete this field. Include detail and explain the action that is needed.

Example Email Body: Includes link to the Employee Portal
Include contact information

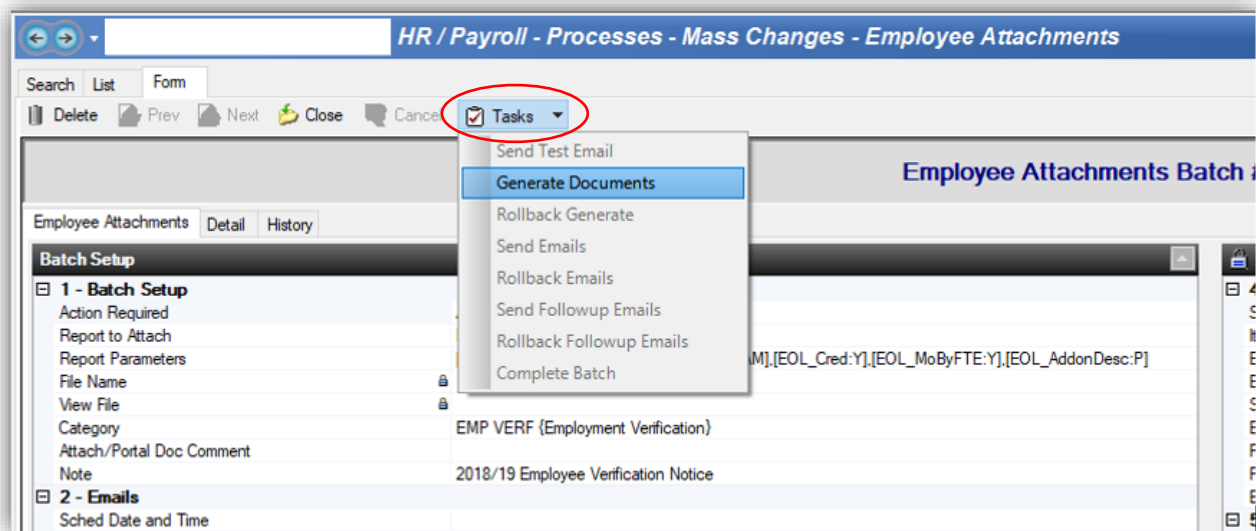
- Click OK when done
- Save/Close



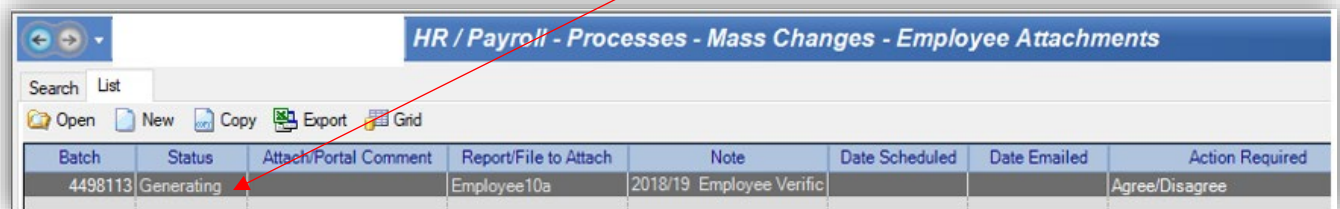
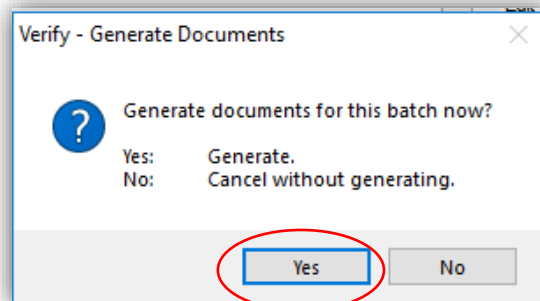
Generate Documents

Reopen Batch

Select **Tasks** to Generate Documents



- Click Yes to Generate (will take a few minutes to process)



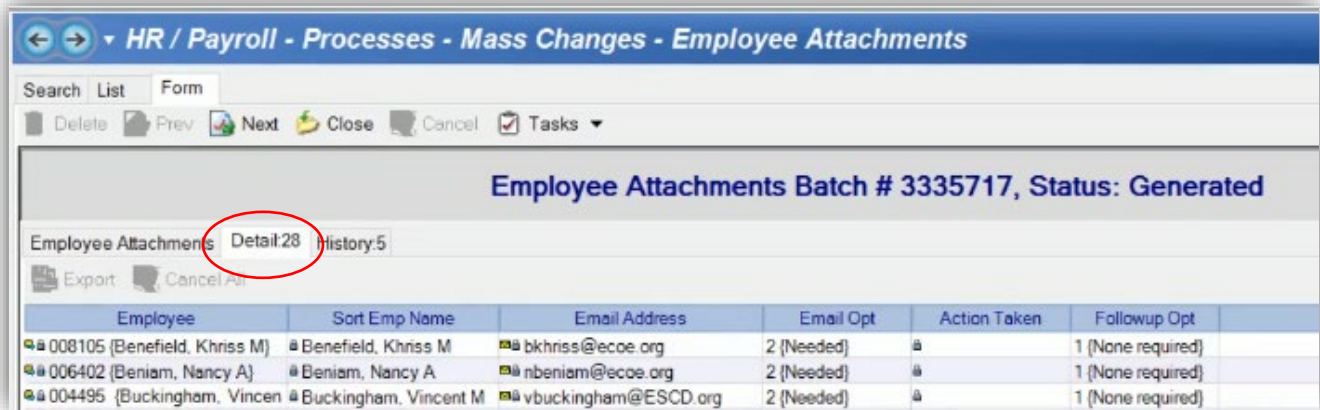
During generation a report will be created for each employee. Once complete, the status of the batch will be changed to Generated.

- Reopen Batch

Detail Tab

Review the reports in the Detail Tab

Highlight the lines to open the record to view the PDF.



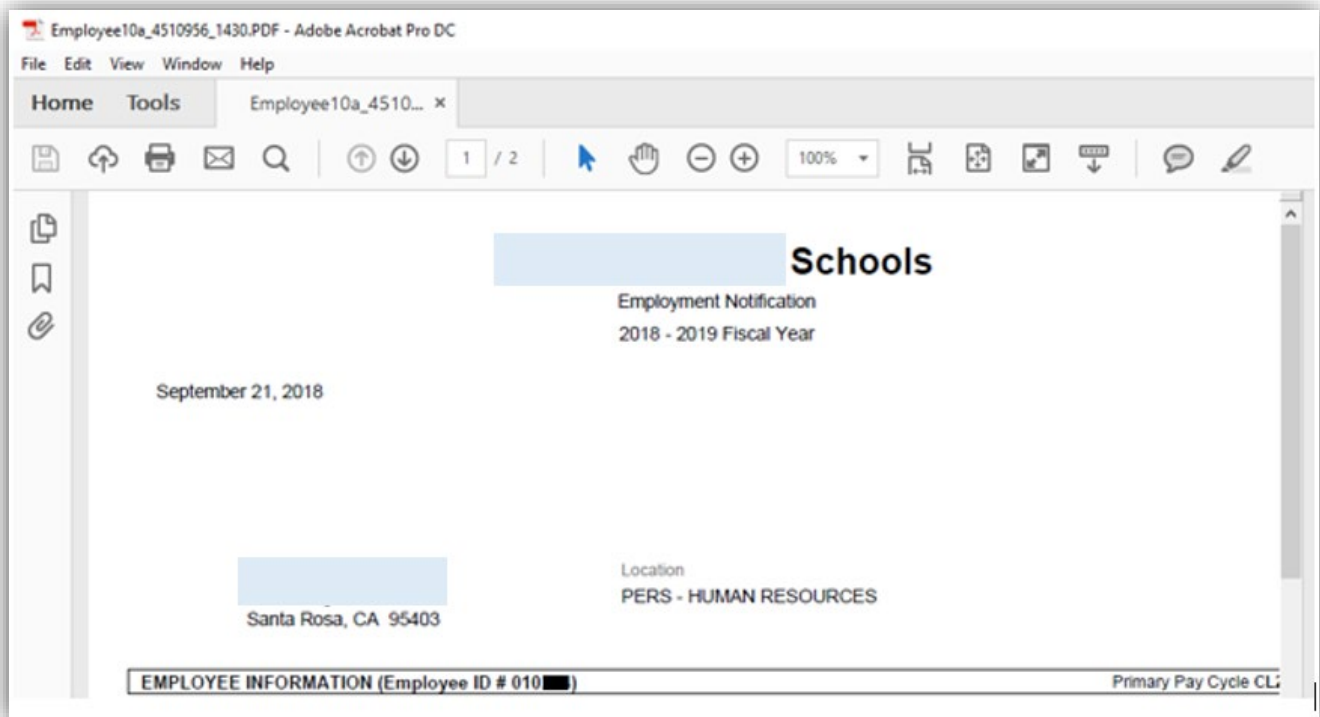
Employee Attachments Batch # 3335717, Status: Generated

Employee Attachments **Detail:28** History:5

Export Cancel All

Employee	Sort Emp Name	Email Address	Email Opt	Action Taken	Followup Opt
008105 (Benefield, Khri M)	Benefield, Khri M	bkhri@ecoe.org	2 (Needed)		1 (None required)
006402 (Beniam, Nancy A)	Beniam, Nancy A	nbeniam@ecoe.org	2 (Needed)		1 (None required)
004495 (Buckingham, Vincen)	Buckingham, Vincent M	vbuckingham@ESCD.org	2 (Needed)		1 (None required)

Example: Document to review before sending emails



Employee10a_4510956_1430.PDF - Adobe Acrobat Pro DC

File Edit View Window Help

Home Tools Employee10a_4510... x

1 / 2 100%

Schools

Employment Notification
2018 - 2019 Fiscal Year

September 21, 2018

Santa Rosa, CA 95403

Location
PERS - HUMAN RESOURCES

EMPLOYEE INFORMATION (Employee ID # 010...)

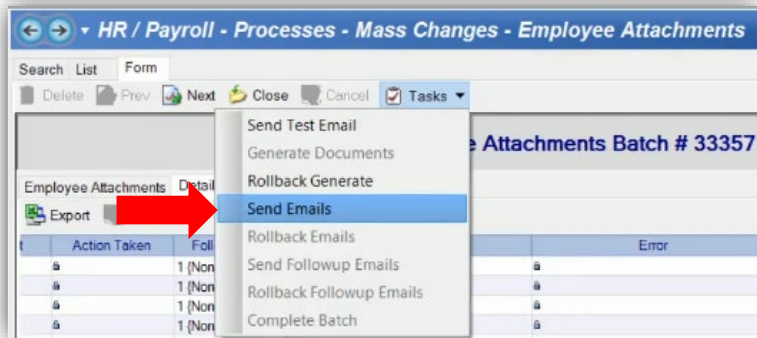
Primary Pay Cycle CL...

- Save/Close

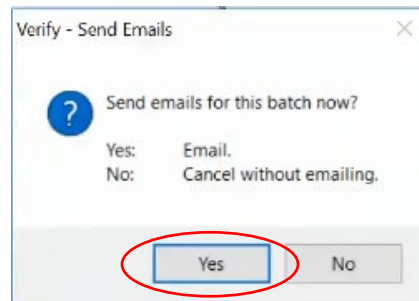
Send Emails

Go to Task to select Send Emails

Emails will be sent to employees and the documents will be attached to the employee's record.



Click Yes to send emails

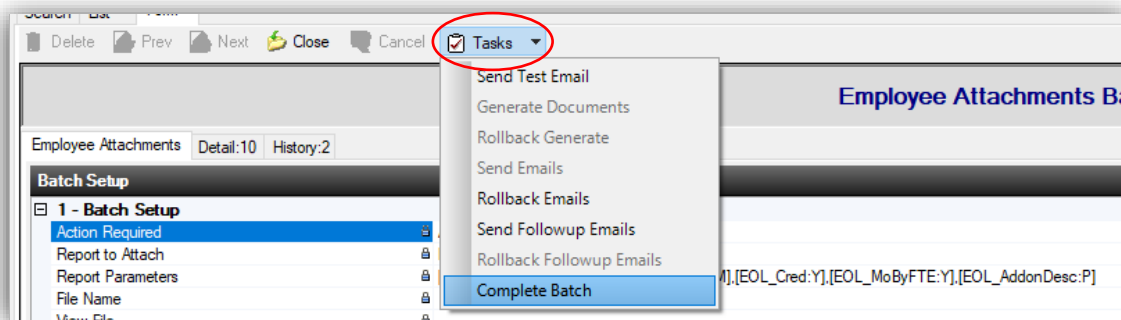


Status

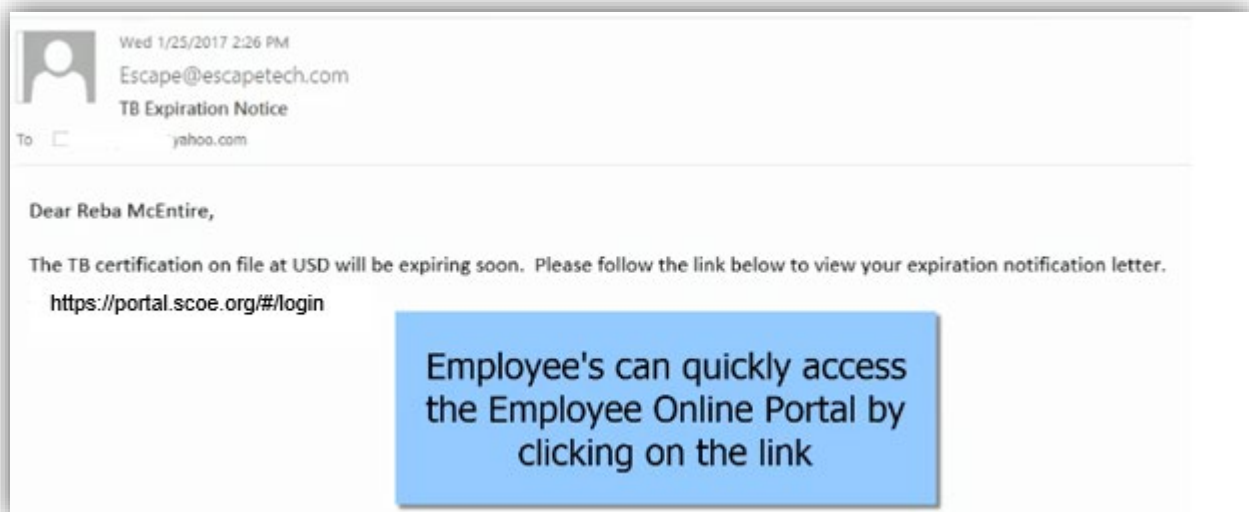
Status Changed to Emailed

Batch	Status	Attach/Portal Comment	Report/File to Attach	Note	Date Scheduled	Date Emailed	Action Required
4510956	Emailed		Employee10a	2018-2019 Test Employ			Acknowledgement required

Go to **Task** to select Complete Batch



Example Employee Email



Employees can use the link in the email to access the Employee Portal and log in to view the notification. The employee will use their User Name and Password to log in. If this is the first time logging in, then follow the prompts to create a User Name and Password.

The Employee will see that they have **New Documents** to review

Action

Action will vary based on the Action Required specified in Escape set-up. Complete action steps as prompted.

