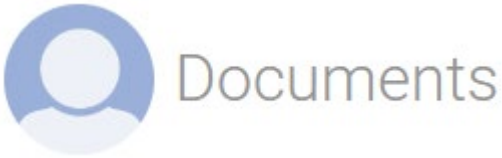
Sonoma County Office of Education

Employee Portal Report Attachments



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 Managagement

In Employee Management there is more flexability 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

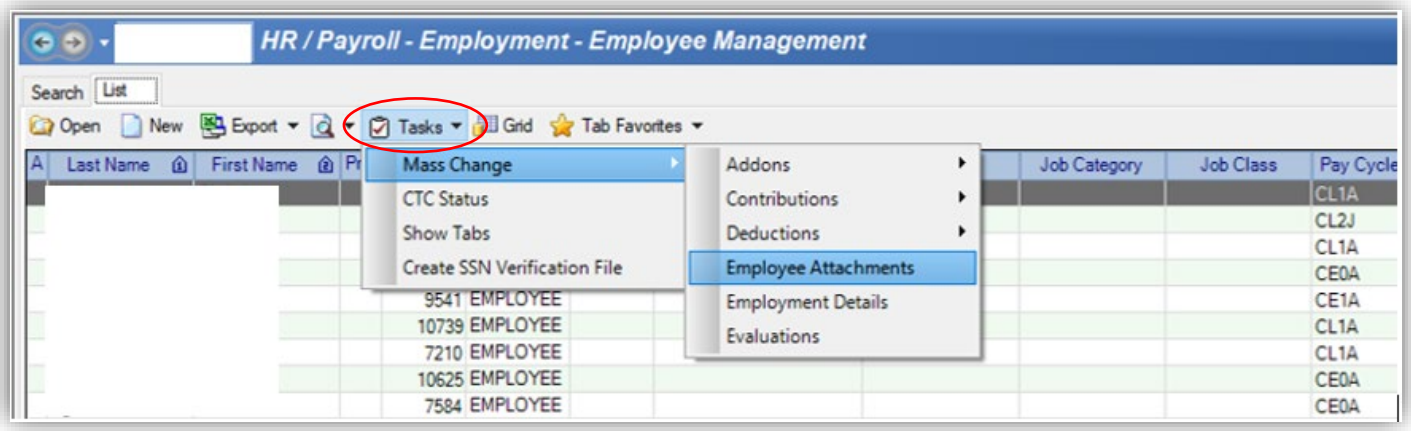
- Select the Search Criteria to create a list of employees

  Example:

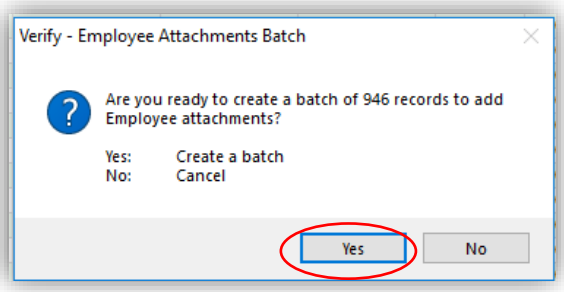
  Section 1 - Demographics
  - Employment Status: EM {Employee}
  - Active Employees: Yes

  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

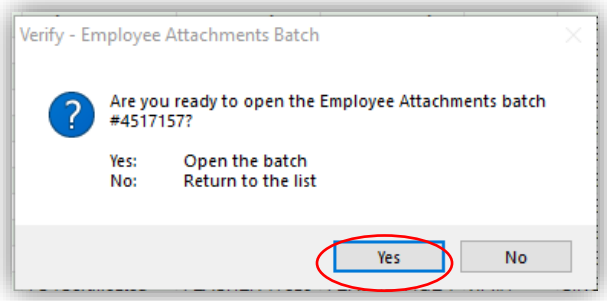
Recommend to select by bargaining unit and alpha to create smaller groups so the activity doesn't time out when sending the email with attachment.



- Click Yes to Create a Batch



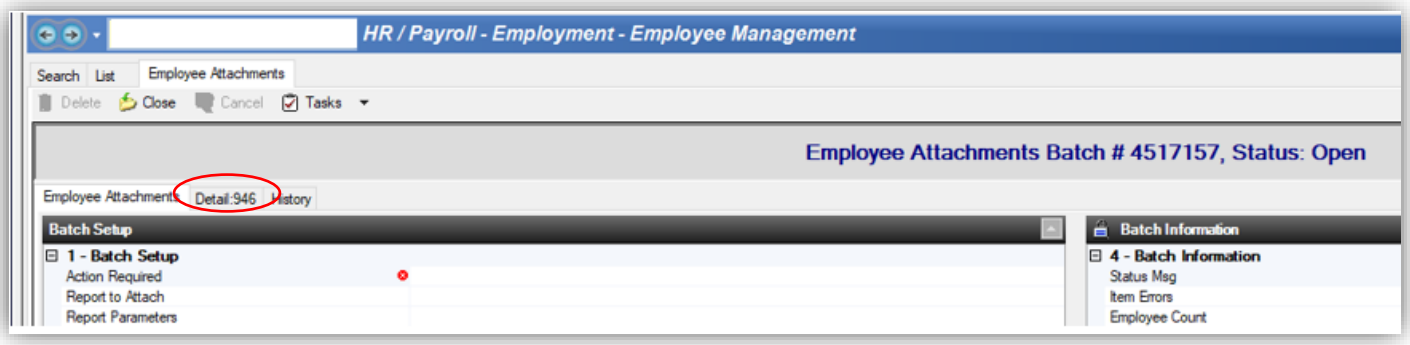
- Click Year to Open the Batch



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

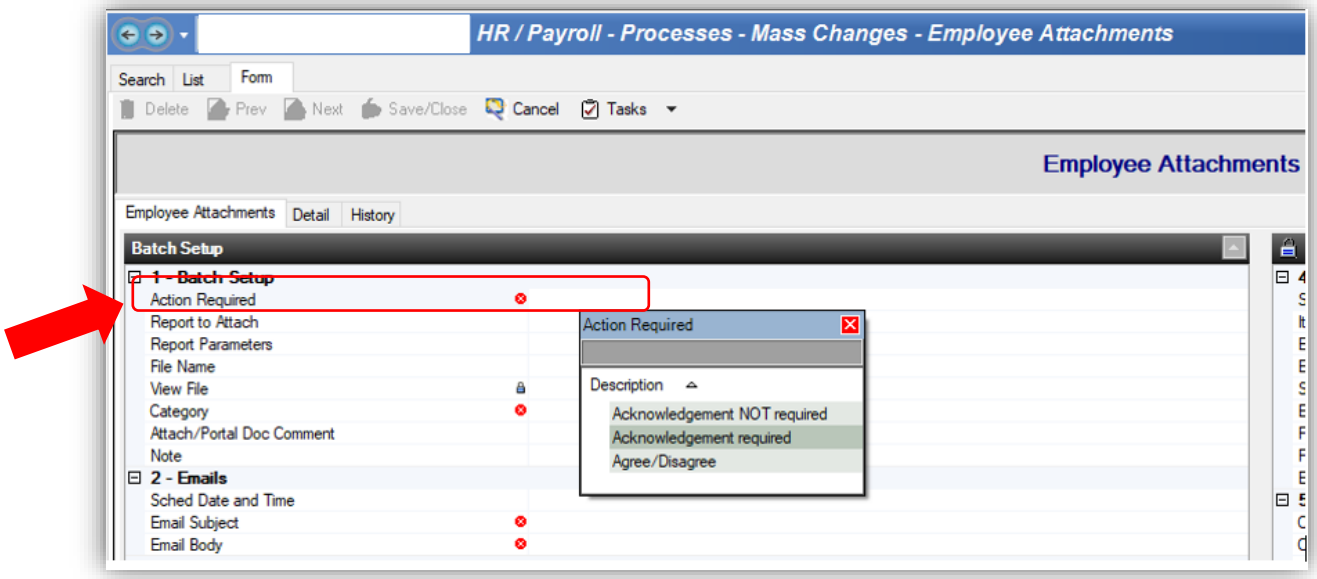
Create New Batch Employee Attachments Activity

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

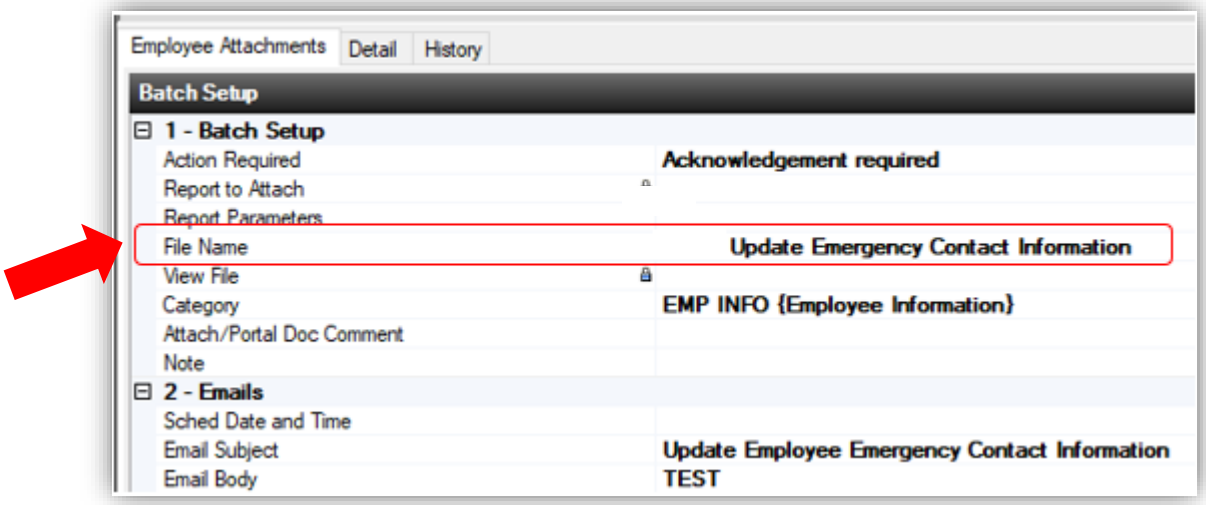
- Click New to create a batch

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.

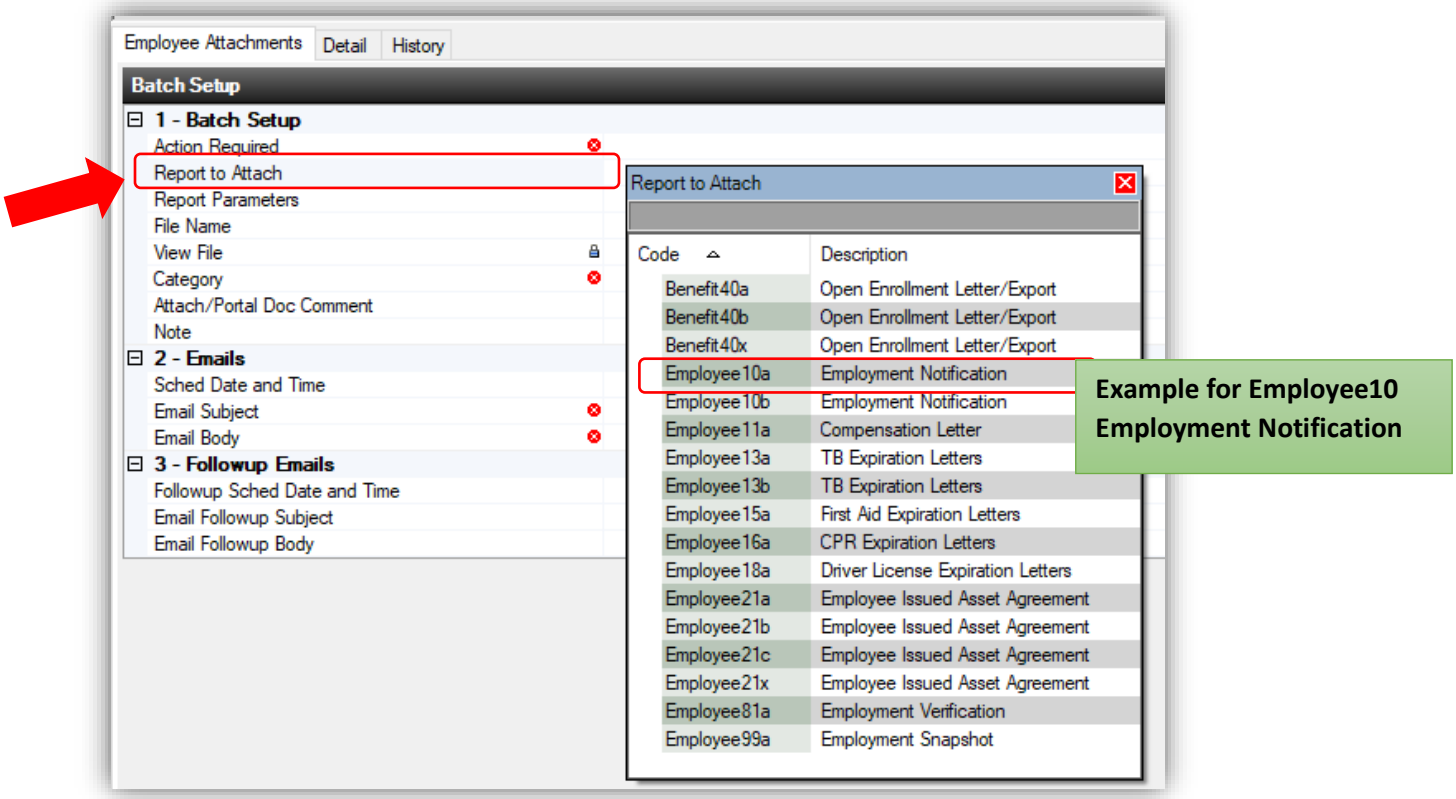
- Acknowledgement NOT required
- Acknowledgement required
- Agree/Disagree



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

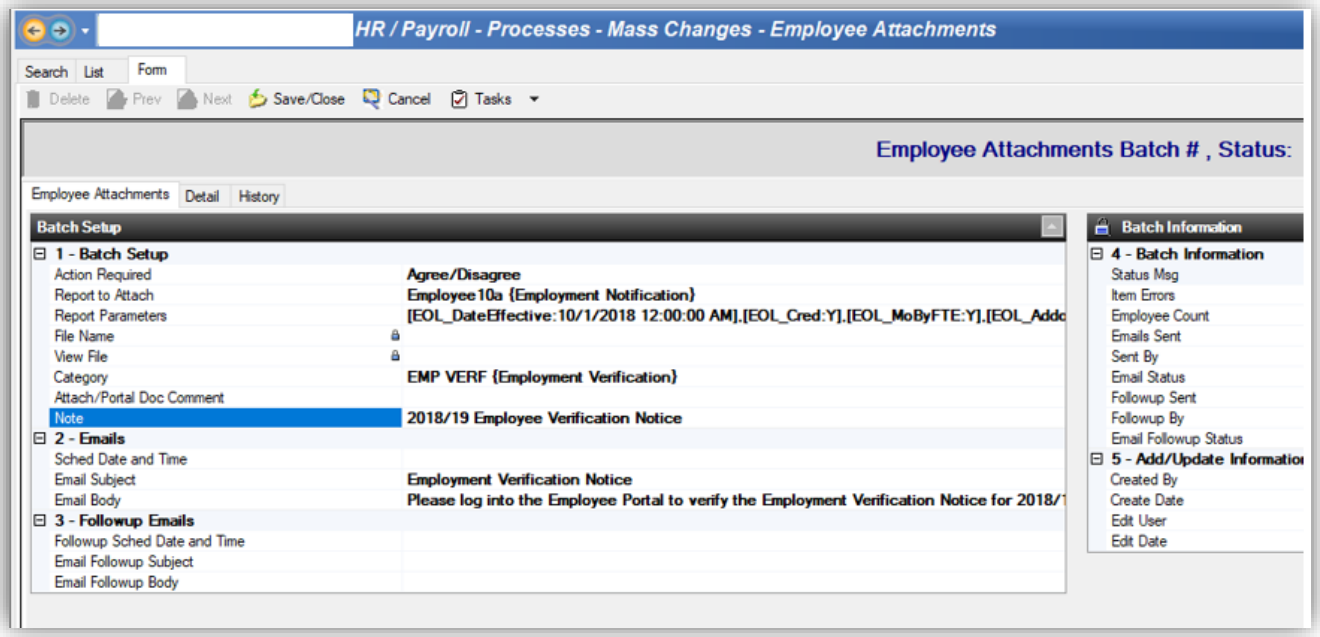


<u>Report to Attach</u>: Select from the list of Reports from the menu



Complete the Report Fields

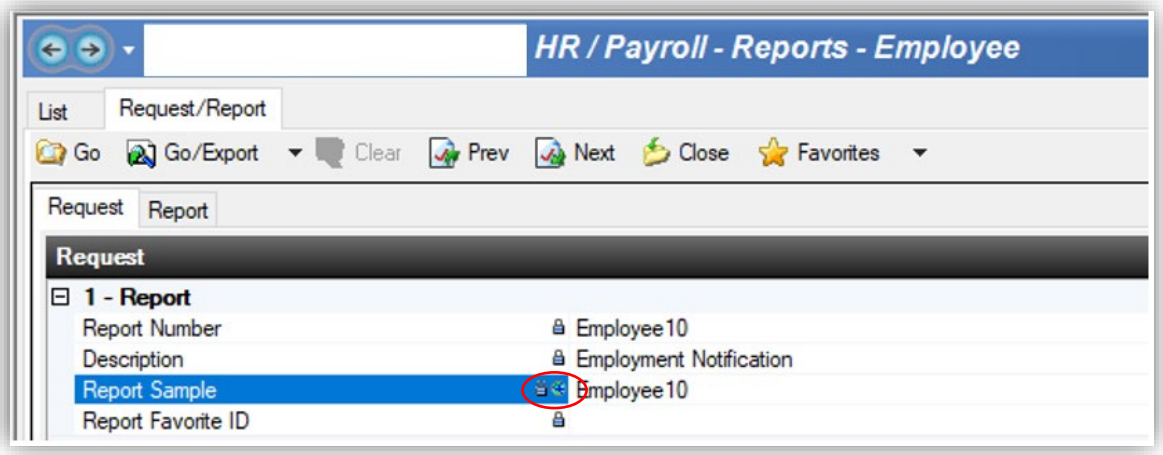
- Use the Note field to Identify the Attachment sent for History and searching



Report Parameters

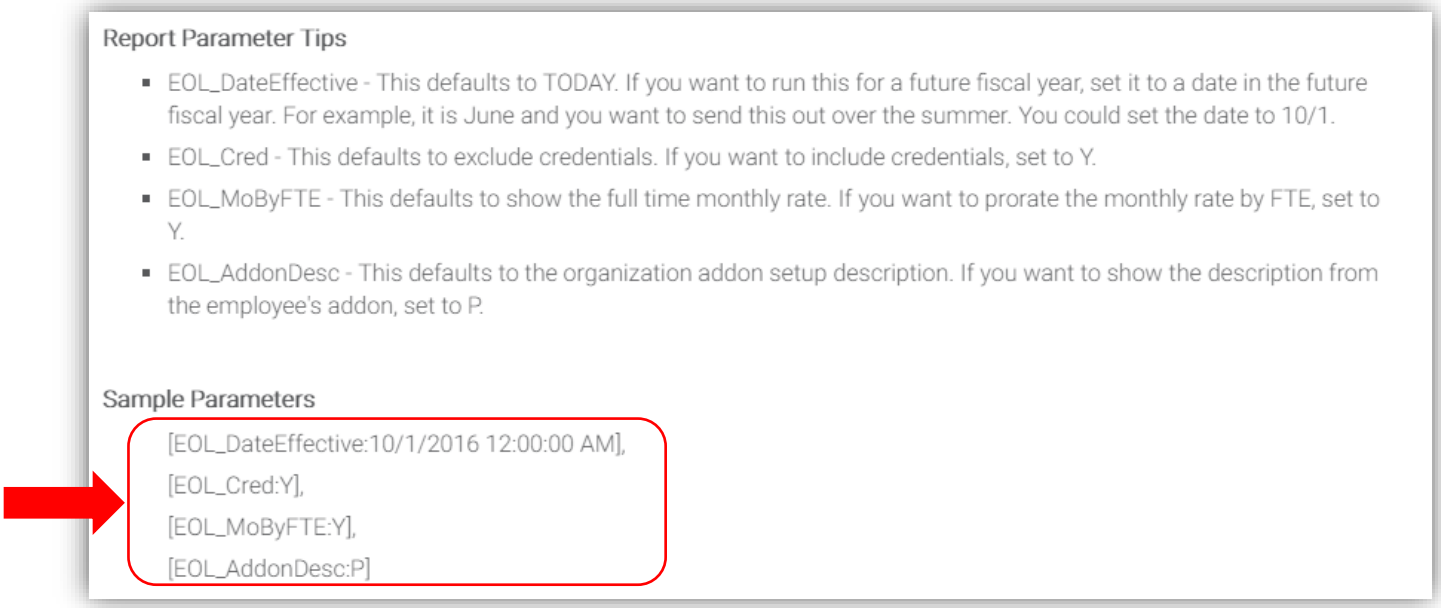
Go to HR/Payroll- Reports-Employee-Employee10

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



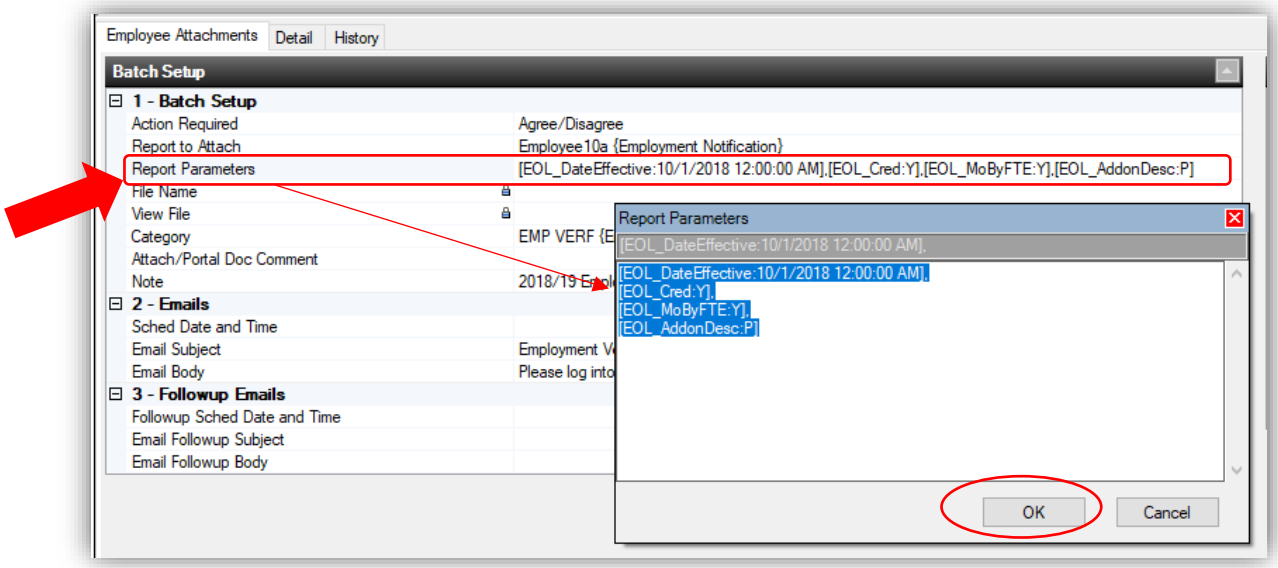
Locate the Sample Parameters in the Report Sampler Documentation

Copy the Sample Parameters to Paste in the Report Parameters field



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.

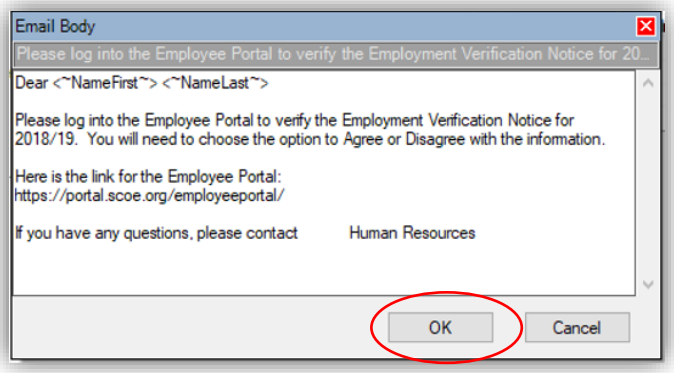
Example Email Subject: 2018/2019 Employment Verification Notice

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

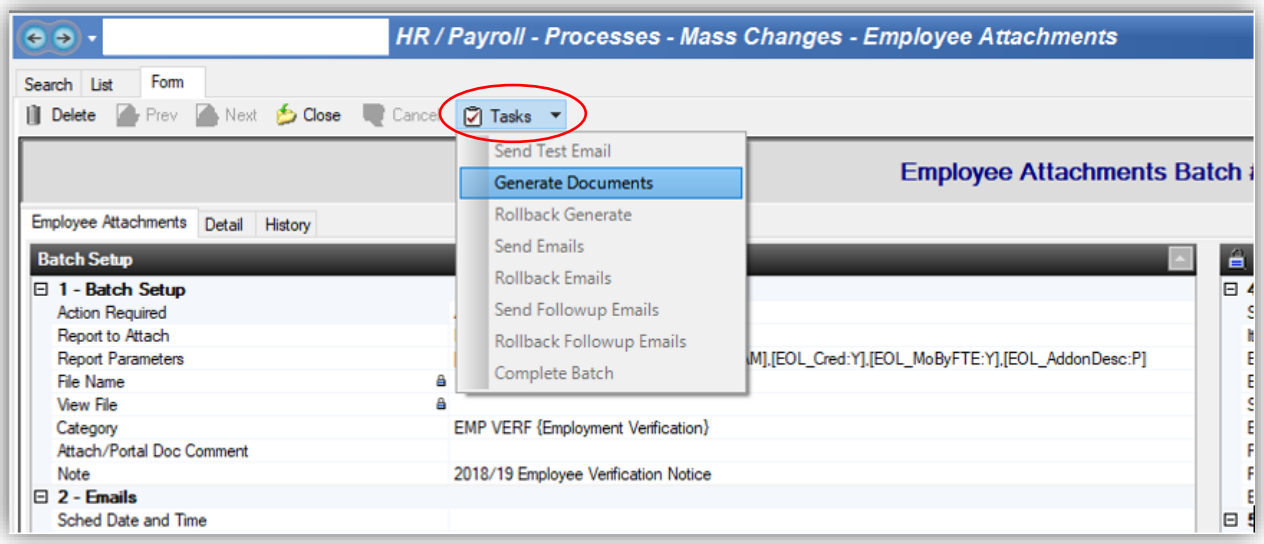
- Click OK when done
- Save/Close



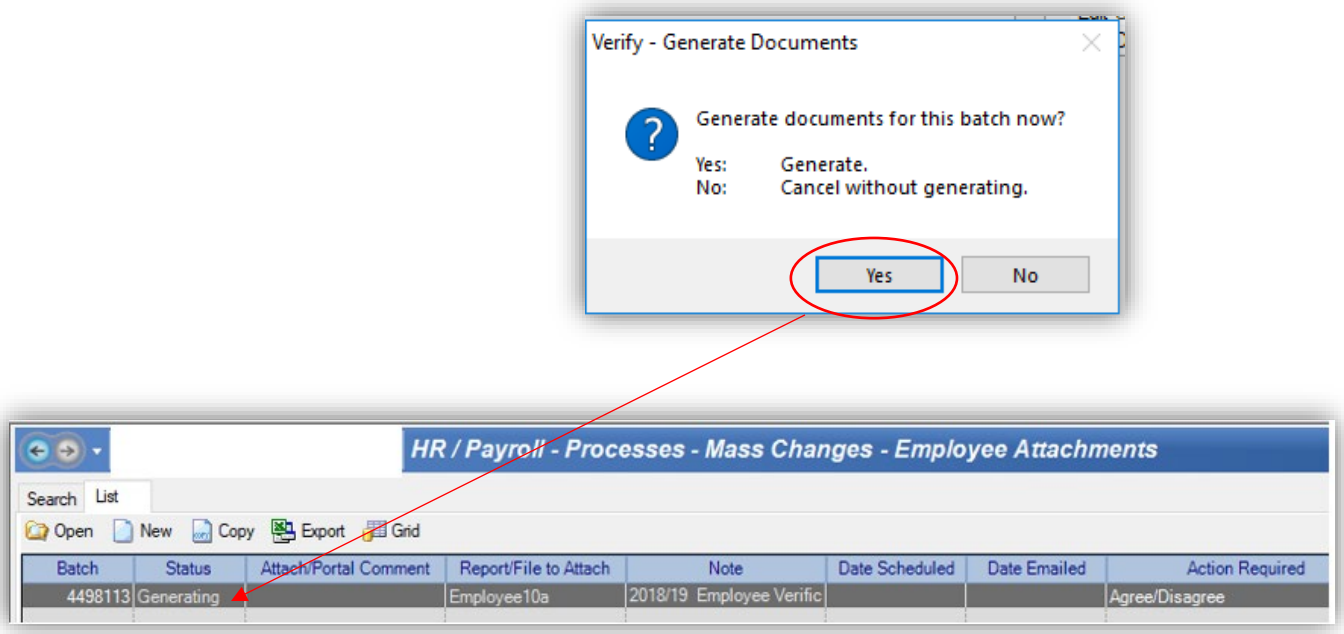
Generate Documents

Reopen Batch

Select **Tasks** to Generate Documents



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



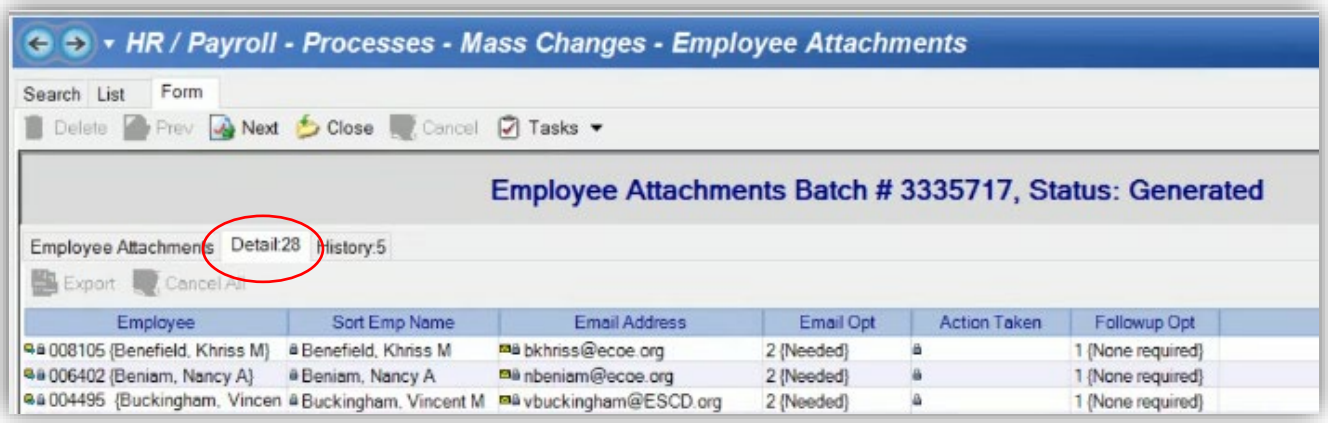
During generation a report will be created for each employee. Once complete, the status of the batch will be changed to Generated.

- Reopen Batch

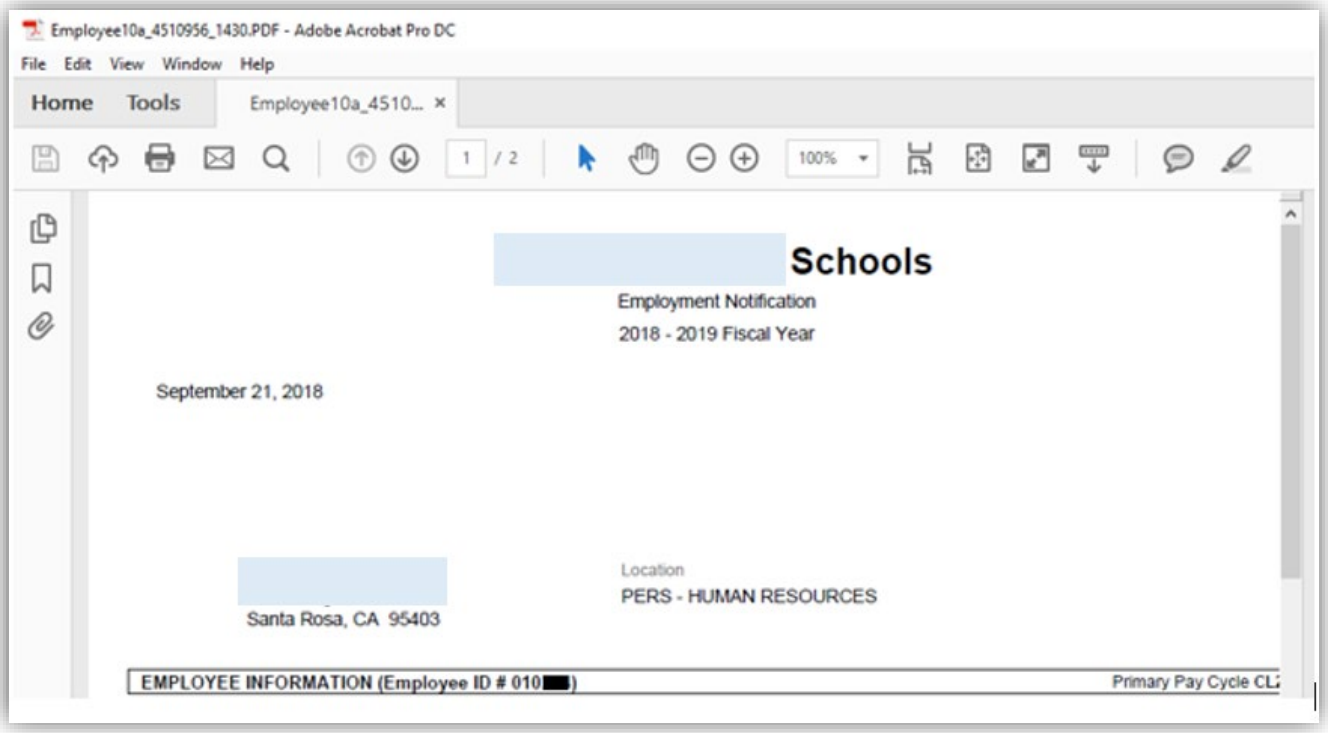
Detail Tab

Review the reports in the Detail Tab

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



Example: Document to review before sending emails

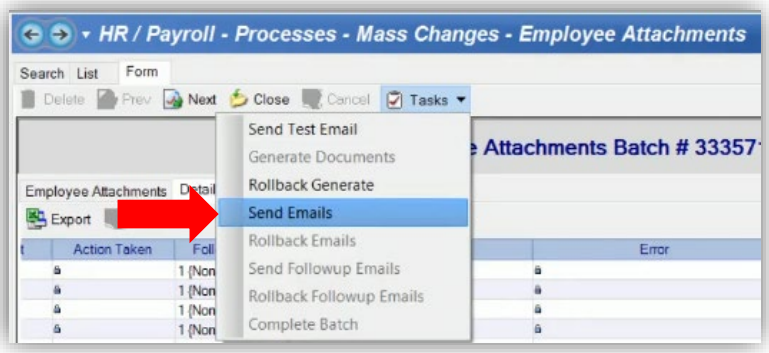


- Save/Close

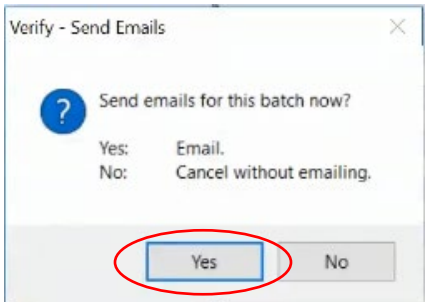
Send Emails

Go to Task to select Send Emails

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

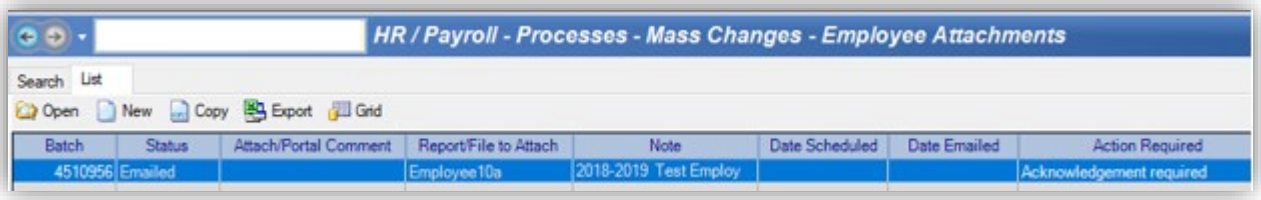


Click Yes to send emails

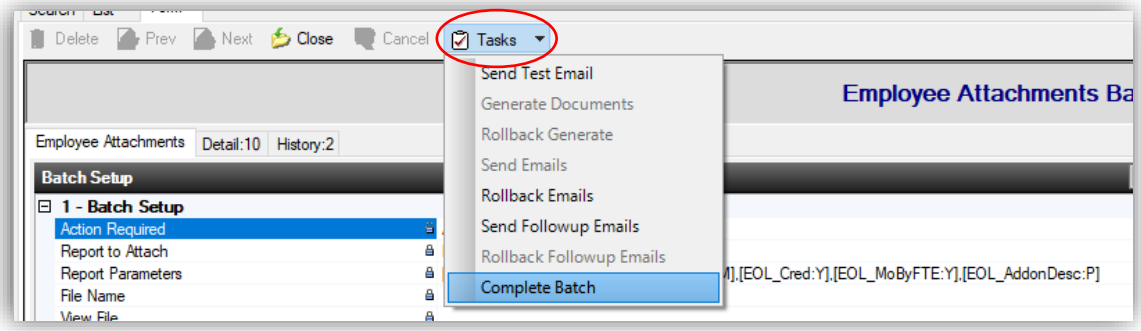


Status

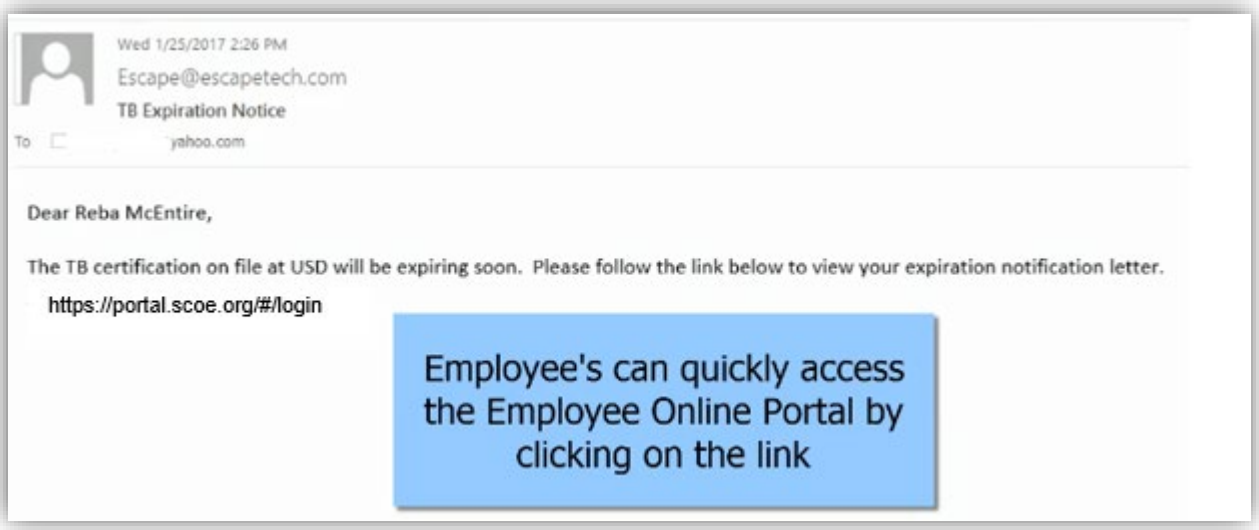
Status Changed to Emailed



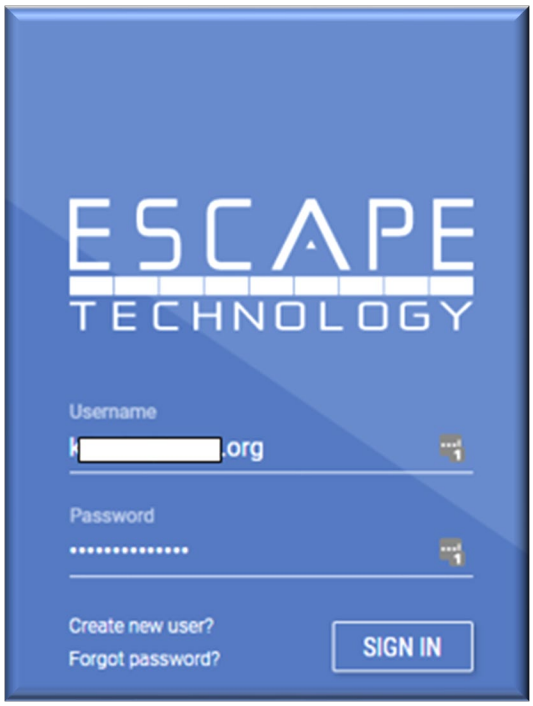
Go to **Task** to select Complete Batch



Example Employee Email



Employees can use the link in the email to acess 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.