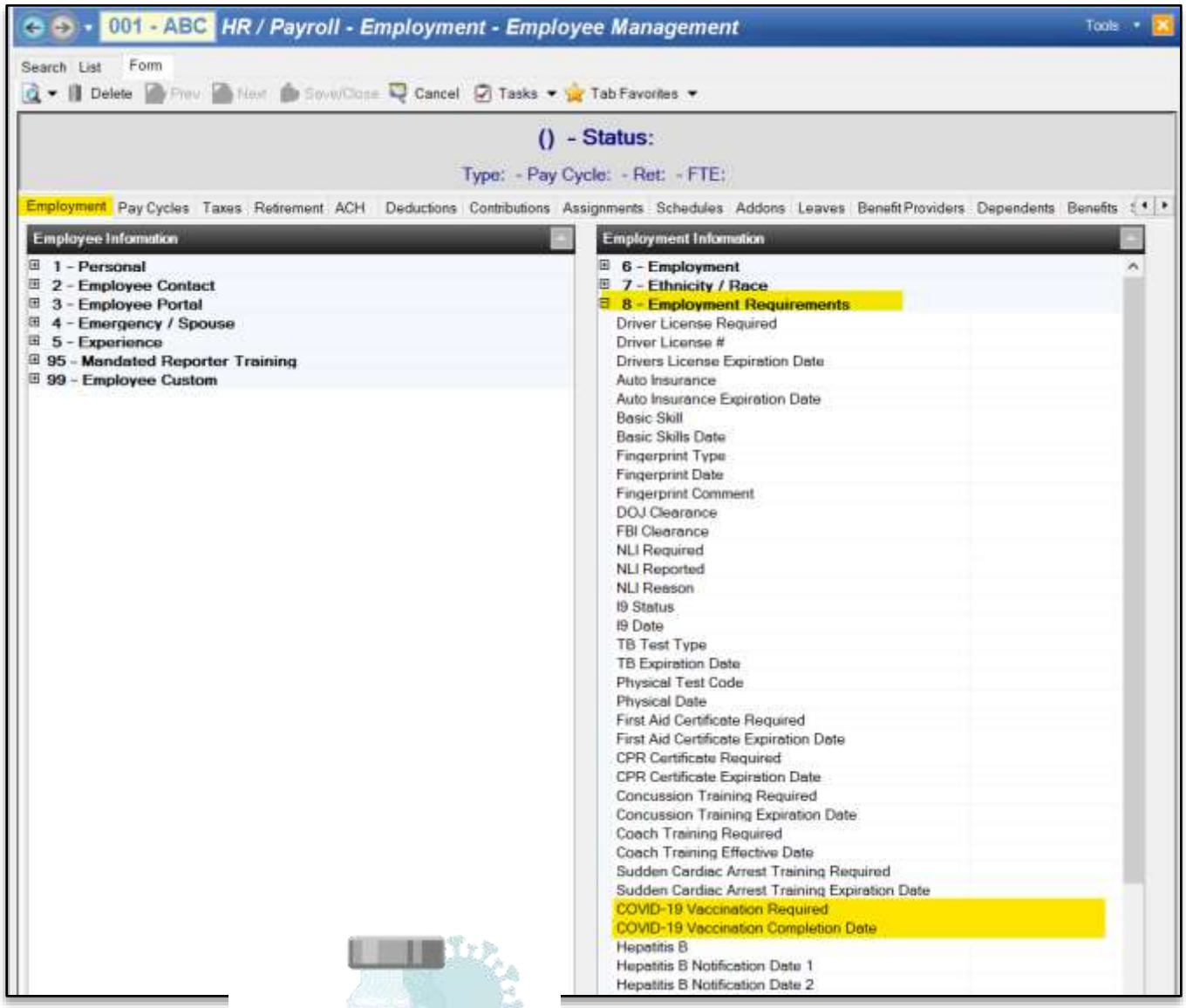
Mass Change Employee Detail

8-1-2022

Employee Management – Mass Change

The **Mass Change** task in Employee Management offers the opportunities to change/update many records including Addons, Benefit Providers, Contributions, Deductions, Employee Attachments, Employment Details and Evaluations. The changes/updates can be imported using a template or entered directly into a mass change batch.

Example: Add COVID-19 Vaccination Required, and Completion Date fields to individual Employee Management Records.



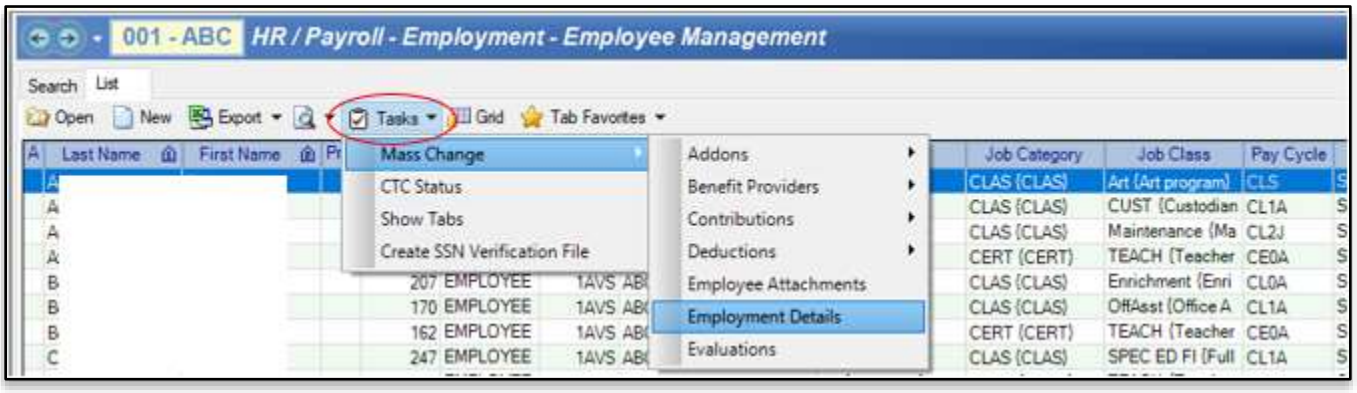
Create Mass Change Batch

Create a list in Employee Management. The example below creates a list of employees with Assignments in Fiscal Year 2022.

Go to HR/Payroll – Employment – Employee Management

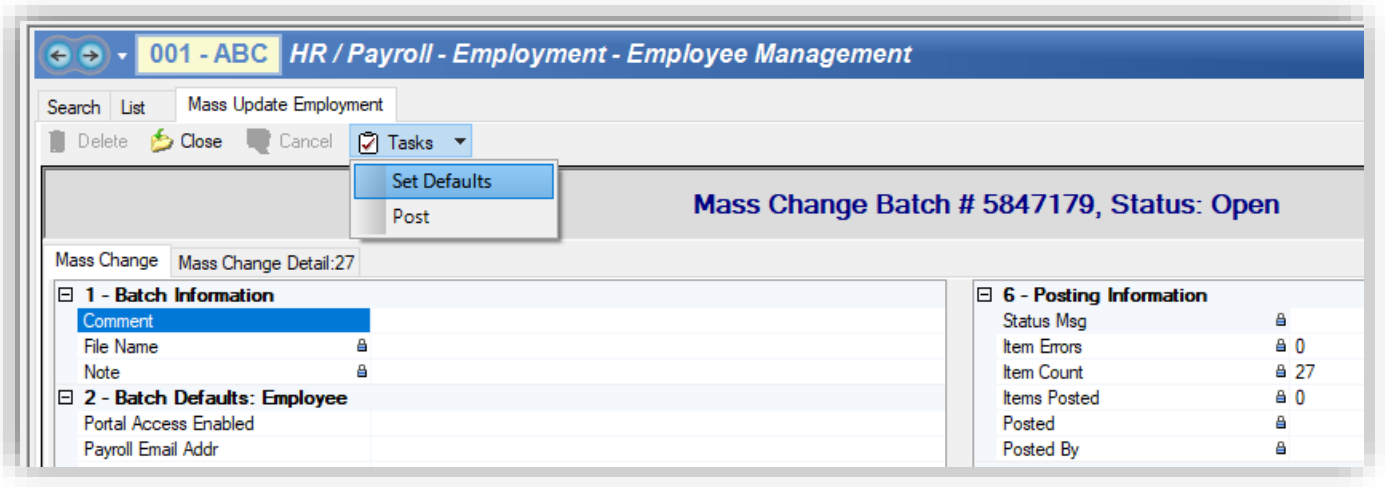
- **Fiscal Year:** 2022 {2021/2022}
- **Click Go** to create the list

- From the list go to **Tasks**
  - Mass Change
    - Employment Details



- Click **Yes** to create a batch
- Click **Yes** to Open the batch

- Review the Mass Change Tab sections 1-5 to set defaults if applicable
- Go to Tasks to Set Defaults
    - Click Yes to Copy all defaults



- Default fields will now be populated on the Mass Change Detail Tab
- Click on the Mass Change Detail Tab
    - Notice when defaults were set all Names become bolded
- Scroll through the fields to populate as needed
- Once data is populated and complete use Tasks to Post

Mass Change Batches can be created and kept Open until all data is entered.

For example, there are 5 employees who have turned in their COVID Vaccine information. The District will receive the remaining employee's information on a staggered basis, with a final due date of Aug 25, 20XX.

Go to HR/Payroll – Employment – Employee Management

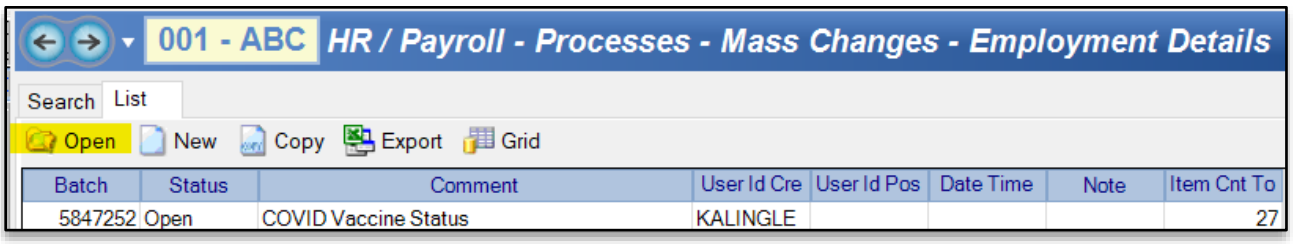
- Enter Search Criteria to create Employee List
- Use Tasks to Create Mass Change Batch
- Assign Defaults in Mass Change Batch
- Save/Close – DO NOT POST until all updated are made

Employment Details Activity

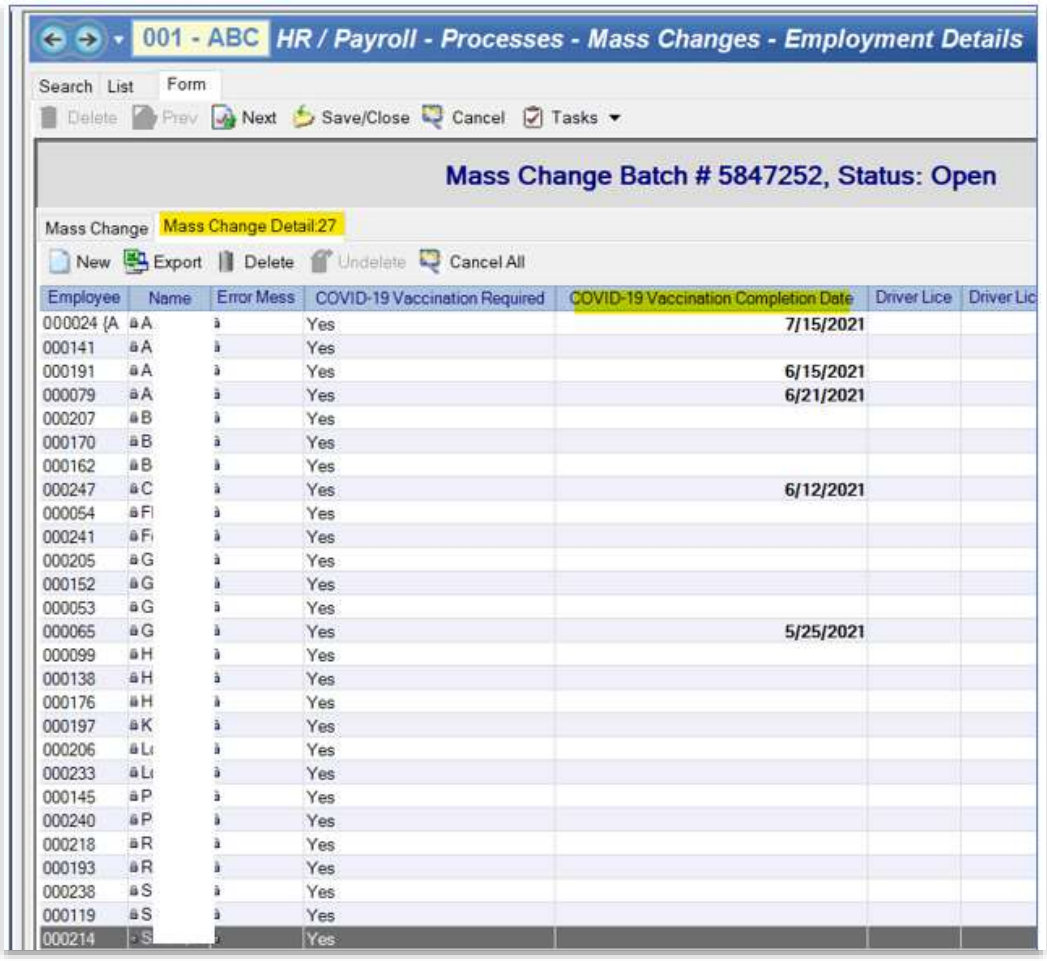
To reopen batch and enter additional information go to Employment Details.

Go to HR/Payroll – Processes – Mass Changes – Employment Details

- Click Go
- Highlight Batch on List Tab
- Click Open



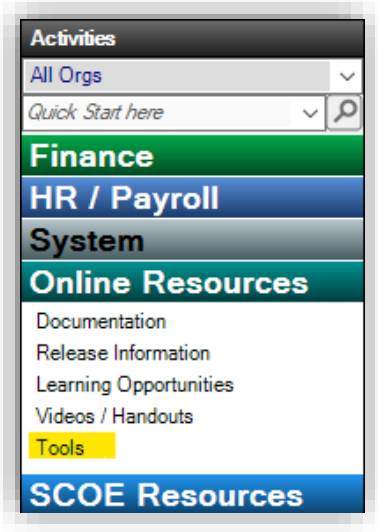
- Click on Mass Change Detail Tab
  - Scroll Over to COVID-19 Fields
  - Enter in data



- Save/Close if not finished with data entry and want to leave the Batch “Open”
- Use Tasks to Post if finished with Data Entry

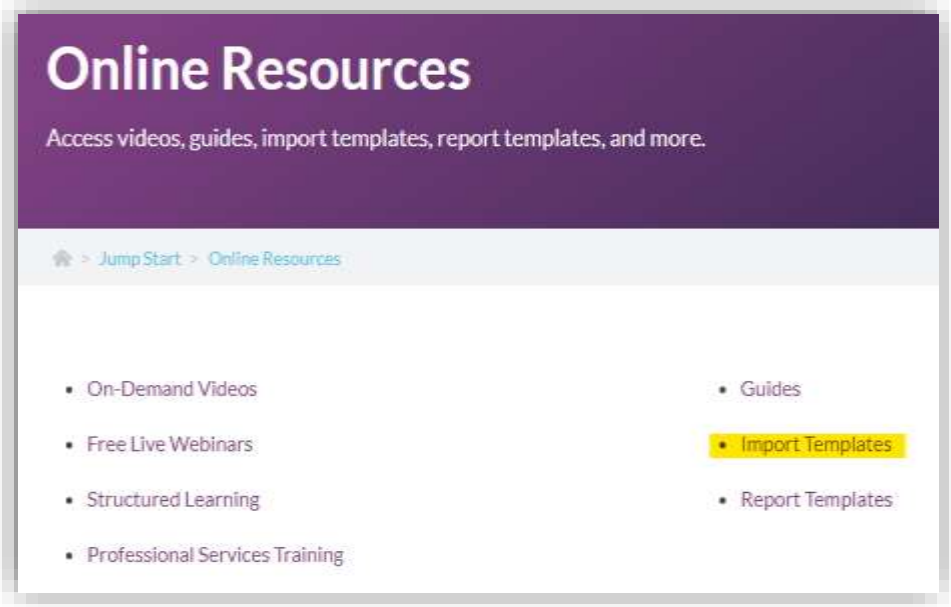
Employment Details Import

If you already have an excel spreadsheet for COVID Vaccine tracking, you can import Mass Changes in Employment Details to post in Employee Management.

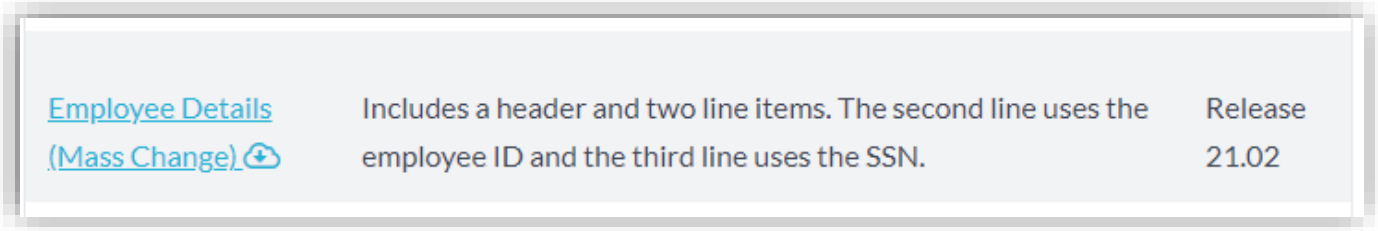


Import Templates can be found in Online Resources

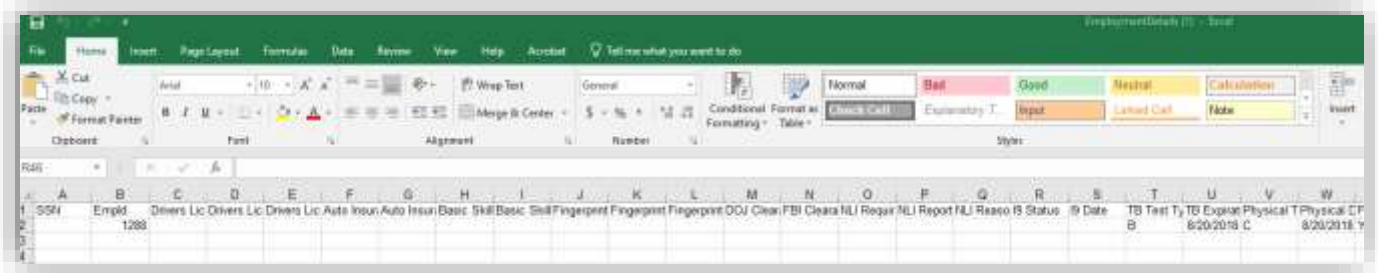
Go to ***Online Resources > Tools > Import Templates***



- Scroll down to locate Employee Details (Mass Changes)
- Click to Download and Open the file



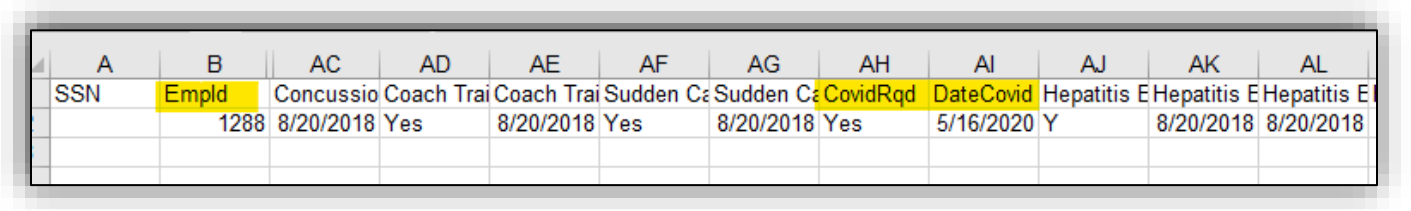
- Excel template will Open; Delete sample data



Import Template

Review the header to see the various fields that can be mass updated in Employee Management. Not all fields must be populated, but the header must remain as is.

- Scroll over to COVID Fields



A	B	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
SSN	EmpId	Concussio	Coach Trai	Coach Trai	Sudden Ca	Sudden Ca	CovidRqd	DateCovid	Hepatitis E	Hepatitis E	Hepatitis E
	1288	8/20/2018	Yes	8/20/2018	Yes	8/20/2018	Yes	5/16/2020	Y	8/20/2018	8/20/2018

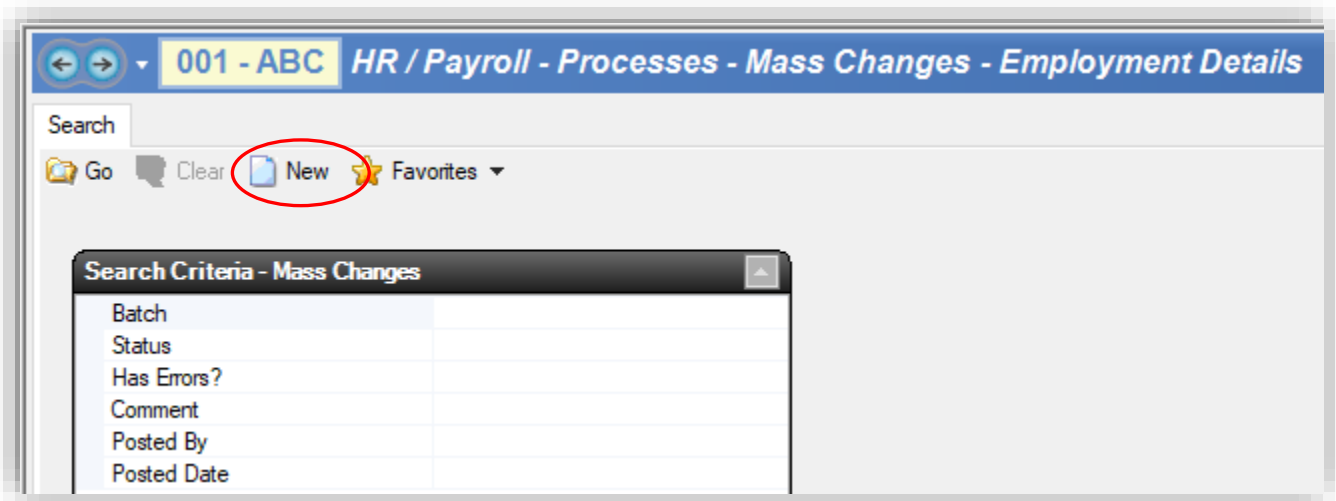
- Copy from your excel spreadsheet
    - Must have Emp Id
    - CovidReq: Yes or No
    - DateCovid: Date of full vaccine
- Once the data is entered Save as CSV (Comma delimited)
- Close the file before importing or will cause an error

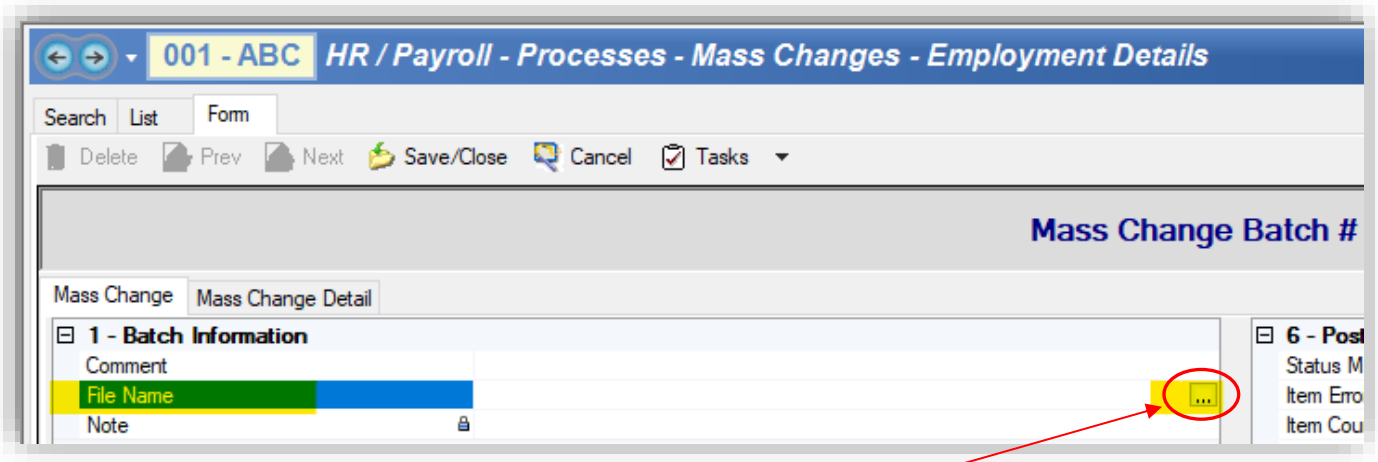
Employment Details Activity

Now that the import file is created, go to Employment Details to import and post to Employee Management.

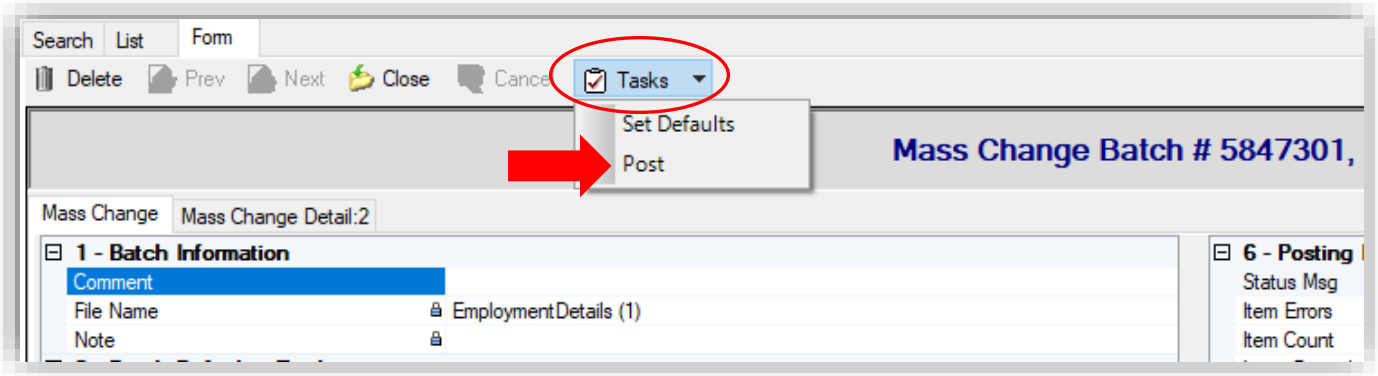
Go to HR/Payroll – Processes – Mass Changes – Employment Details

- Click New to create a batch





- Click in the File Name field to activate
- Click on the File Locator
- Locate the file
    - If Error reading file, this is because the .CSV filed is open
    - Close the file and try the import again
- Mass Change Tab can be edited with defaults if needed
- Go to the Mass Change Detail to Tab to review imported data
    - Data can be edited or more employees can be added manually
- Save/Close
- Re-open
- Go to Tasks to Post

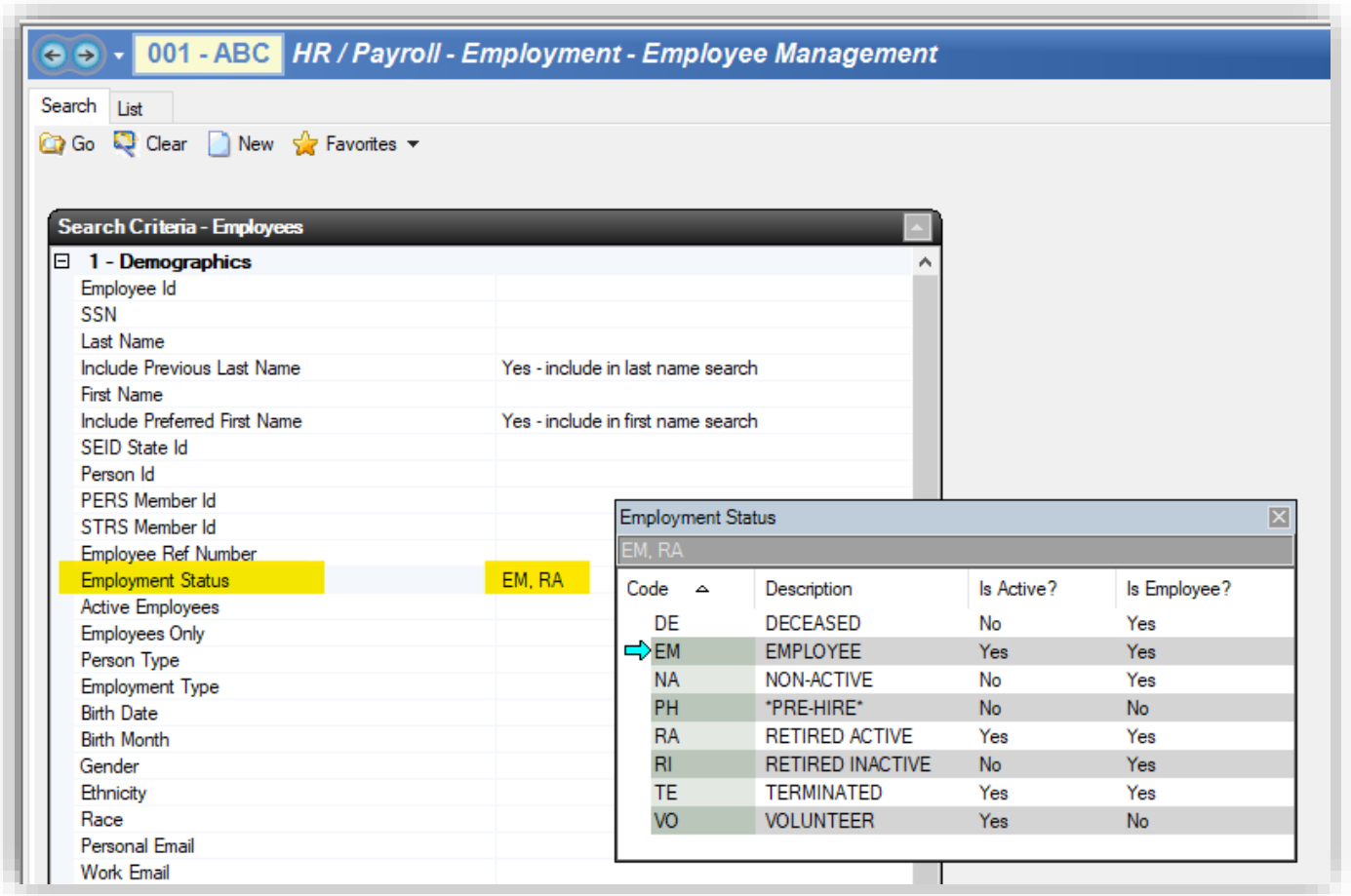


COVID List

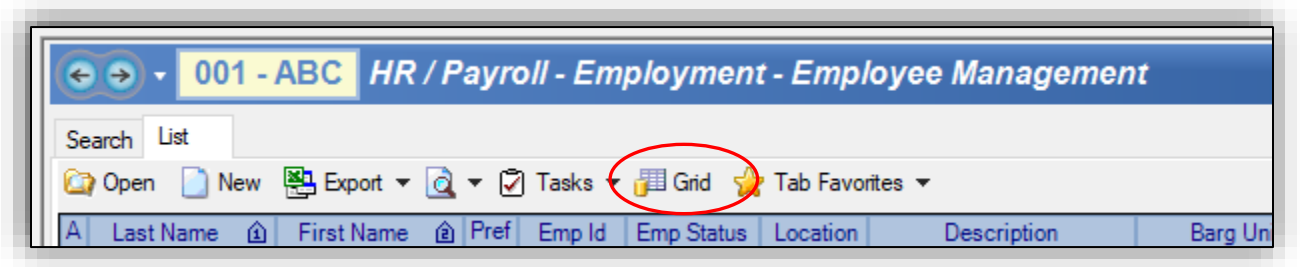
Once the data has been updated in the system for COVID Vaccines, a complete list can be created to see who has the vaccine and who still needs the vaccine. A list of current employees can be created in Employee Management.

Go to HR/Payroll – Employment – Employee Management

- Employment Status: Select from list
    - Hold the Ctrl Key to select multiple codes, press Enter to populate

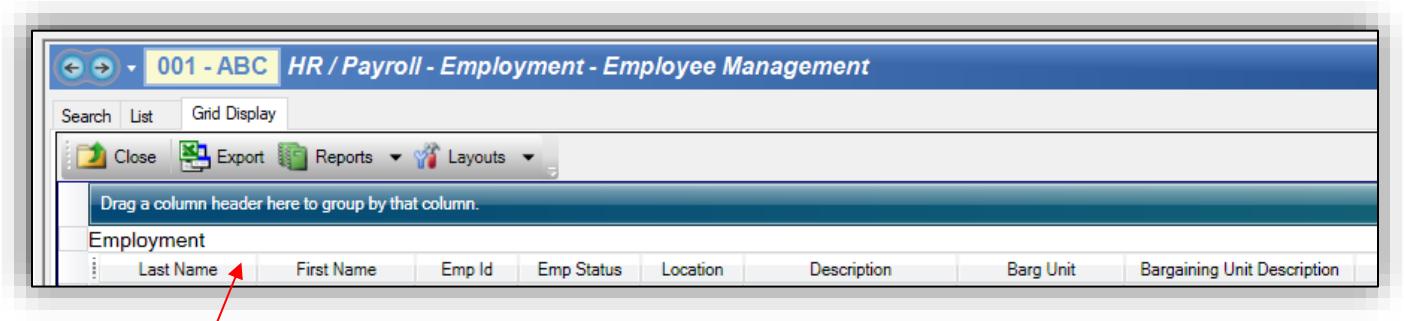


- Review the list to verify this is what you want
- Click on Grid to select the fields to export



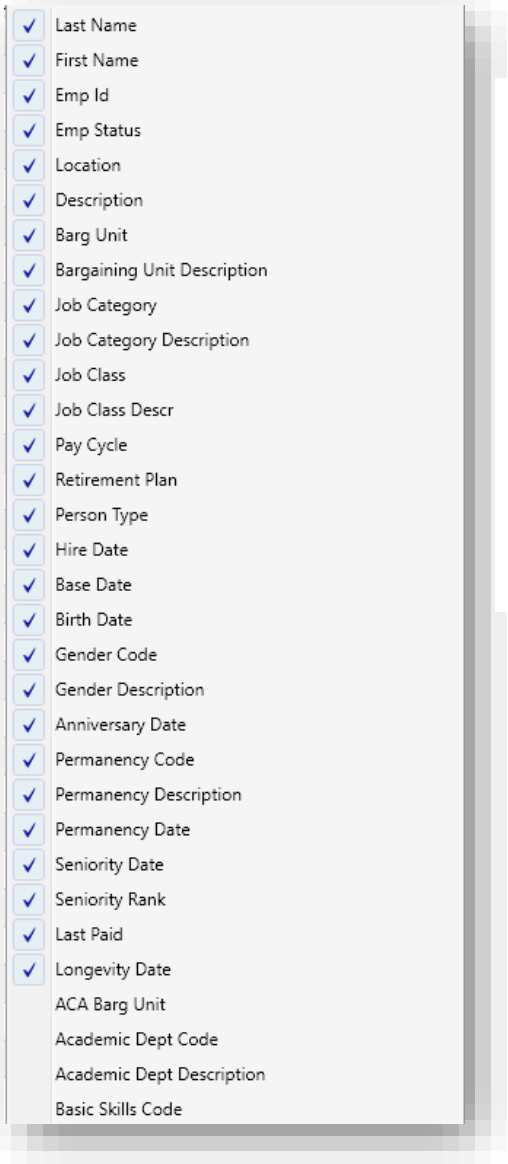
Grid Display

The Grid Display will open and then the columns can be selected and unselected to create a custom header.



- Right Click in the header next to the Last Name to get the list to select the columns

Click to Uncheck the fields not needed

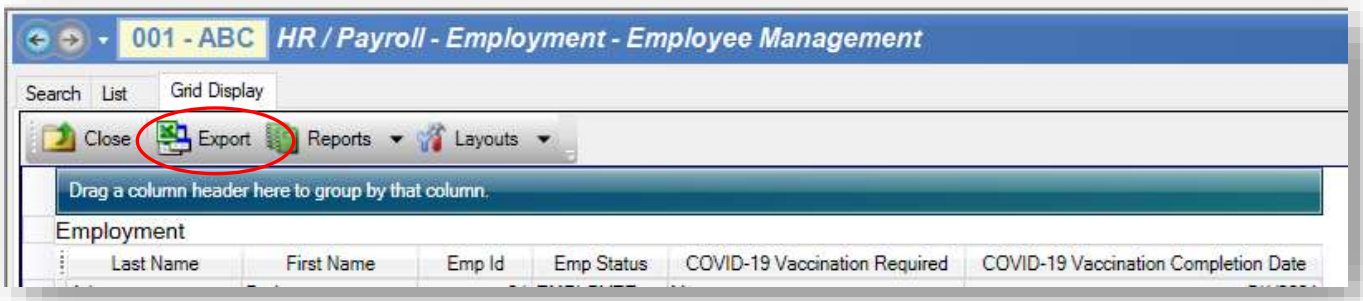


Scroll down

Click on COVID fields to select

Scroll down to end of list to Uncheck fields not needed

Once the headers are set as needed as needed, click Export to get a list in Excel



Example Excel Export:

	A	B	C	D	E	F	G	H
1	Last Name	First Name	Emp Id	Emp Status	COVID-19	COVID-19 Vaccination Completion Date		
2	A		4	EMPLOYEE	TRUE	5/1/2021 0:00		
3	G		3	EMPLOYEE	TRUE	6/14/2021 0:00		
4	F		4	EMPLOYEE	TRUE	5/6/2021 0:00		
5	G		5	EMPLOYEE	TRUE	3/26/2021 0:00		
6	M		9	EMPLOYEE	TRUE			
7	H		9	EMPLOYEE	TRUE	6/28/2021 0:00		
8	S		9	EMPLOYEE	TRUE			
9	H		8	EMPLOYEE	TRUE	4/16/2021 0:00		
10	A		1	EMPLOYEE	TRUE	8/15/2021 0:00		
11	P		5	EMPLOYEE	TRUE			
12	G		2	EMPLOYEE	TRUE	4/30/2021 0:00		
13	B		2	EMPLOYEE	TRUE	4/27/2021 0:00		
14	B		0	EMPLOYEE	TRUE	7/19/2021 0:00		
15	H		6	EMPLOYEE	TRUE			
16	A		1	EMPLOYEE	TRUE	6/8/2021 0:00		
17	R		3	EMPLOYEE	TRUE			
18	K		7	EMPLOYEE	TRUE			
19	G		5	EMPLOYEE	TRUE	5/5/2021 0:00		
20	L		6	EMPLOYEE	TRUE			
21	B		7	EMPLOYEE	TRUE	4/15/2021 0:00		
22	S		4	EMPLOYEE	TRUE			
23	R		8	EMPLOYEE	TRUE			
24	L		3	EMPLOYEE	TRUE			
25	S		8	EMPLOYEE	TRUE			
26	P		0	EMPLOYEE	TRUE			
27	F		1	EMPLOYEE	TRUE	4/19/2021 0:00		
28	C		7	EMPLOYEE	TRUE	6/24/2021 0:00		
29	D		9	EMPLOYEE	TRUE	5/26/2021 0:00		
30								

Once the list is Exported to Excel you can still manipulate as needed

Sort by the COVID-19 Vaccination Completion Date to see who still needs to get the vaccine or who needs to be tested