
Attendance & Absence Module

User Guide – V 12.0

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Introduction

Attendance & Absence will record all absences, but before it can manually or electronically capture specific information related to an absence, there are some tables that need to be built.

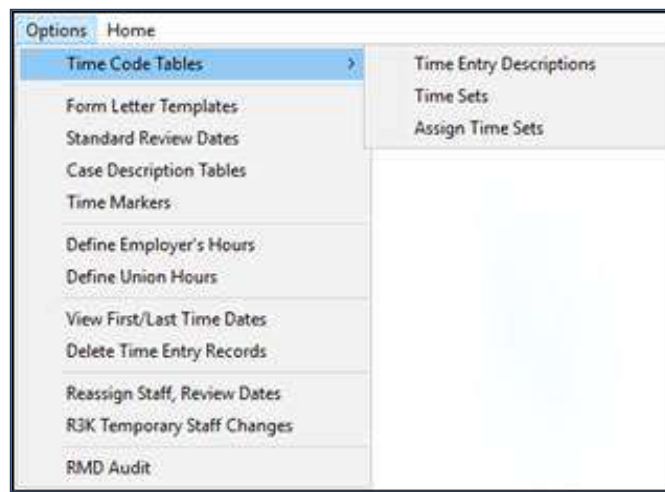
The user must define **Time Entry Descriptions** and **Time Entry Sets**.

Should a decision be made to electronically download absence records, the process would be simplified if the **Time Entry Descriptions** match those of the source data. From the menu, click **Options** and select the appropriate heading.

Options

Define Time Entry Descriptions

In **Attendance & Absence** you must determine the types of time entries you wish to track.



Under **Options**, setup your time entries using the **Define Time Entry Descriptions** function. One entry should be made for each absenteeism category that you wish to monitor in your system.

Give special consideration to the various types of sickness or leaves that you wish to monitor. You can make it as specific or as general as you wish, however, it is best to make such a determination now rather than later.

For example, you may wish to record an absence such as, "sick", or you may wish to be more specific by indicating the type of illness (e.g., "sick-paid" or "sick-unpaid"). These entries can all be recorded as the same **Type** for statistical reporting.

For each **Time Entry** category, you must specify the following:

Description - General description of the **Time Entry**

Abbreviations - Five (5) and two (2) digit abbreviations used for the Time Entry on screens and reports.

Off or At Work - Indicates that the employee is absent from work or at work on the Absence Registry.

Type - The type of absence can be identified as Sick, Statutory, Vacation, LOA, WCB Days, WCB Hours, DsManager, LTD or Other.

Description	5 & 2 Character Abbreviations	Off or At Work	Type	Authorized
1 Sick with pay	SICK S1	Off work	Sick	Unauthorized
2 Sick pay cover	SICKC S2	Off work	Sick	Unauthorized
3 Sick pay overtime	SICKO S3	Off work	Sick	Unauthorized
4 Sick no pay	SKNP S4	Off work	Sick	Unauthorized
5 Sick no pay covered	SKNPC S5	Off work	Sick	Unauthorized
6 Sick no pay overtime	SKNPO S6	Off work	Sick	Unauthorized

Authorized - Unauthorized absences are a default category for reporting purposes.

Description	5 & 2 Character Abbreviations	Off or At Work	Type	Authorized
1 Sick with pay	SICK S1	Off work	Sick	Unauthorized
2 Sick pay cover	SICKC S2	Off work	Sick	Unauthorized
3 Sick pay overtime	SICKO S3	Off work	Sick	Unauthorized
4 Sick no pay	SKNP S4	Off work	Sick	Unauthorized
5 Sick no pay covered	SKNPC S5	Off work	Sick	Unauthorized
6 Sick no pay overtime	SKNPO S6	Off work	Sick	Unauthorized
7 Vacation	VAC V	Off work	Vacation	Authorized
8 Vacation covered	VACC VC	Off work	Vacation	Authorized
9 Vacation overtime	VACO VO	Off work	Vacation	Authorized
10 Training/Education	TRAIN TR	At work	Other	Authorized
11 Stat Holiday	STAT HO	Off work	Statutory	Authorized

Define Time Sets

Time Sets give the ability to group time entries together and report them as one. You can have multiple time codes that refer to the same type of time entry. **Time Sets** can be setup at any time and can be changed later with no repercussions.

For example, when tracking sick time, you may have a need to track specific categories such as, sick with pay, sick at 75% pay, sick no pay, etc., or, you may have a need to track sick self, sick family, etc. While having the ability to review the finer categories of sick time, generally you may wish to review sick time as a whole.

Make sure that you have defined your **Time Entry Descriptions** first.

Click on **Options/Define Time Sets**. Enter a **Description** and tab to enter a 5 character and 2 character Abbreviation. You are allowed a maximum of ten (10) sets.

Next, assign time entry codes to the appropriate **Time Set** number.

	Description	5 & 2 Character Abbreviations	
1	Sick	Sick	Si
2	Vacation	Vac	Va
3	Leave	Leave	Le
4	WCB	WCB	Wc
5	Mod Duties	Mod	Md
6	Discipline Issue	Disc	Di
7	Substitute	Sub	Su
8	Spares	Spare	Sp
9	FML	FML	Fm
10			

To Add A Time Set:
Go to the first blank line and type the name of the Time Set.

Never leave a blank line between Time Sets.

Exit F12

Assign Time Sets

Once **Time Sets** are defined you can assign the **Time Entry Descriptions** appropriately.

Click on **Options/Assign Time Sets**. Click on the dropdown of the **Time Set** field and select the appropriate **Time Set** for the Time Code.

Time Code	Time Set
Sick with pay	Sick
Sick pay cover	Sick
Sick pay overtime	Sick
Sick no pay	Sick
Sick no pay covered	Sick
Sick no pay overtime	Sick
Vacation	Vacation
Vacation covered	Vacation
Vacation overtime	Vacation
Training/Education	Leave
Stat Holiday	Vacation

Reports will provide the following options:

- Report on Unauthorized Time
- Report on Time Entries
- Report on Time Sets

Full Time Equivalent – FTE

Attendance provides four (4) methods of reporting for analysis:

- by hours
- by number of days
- by company FTE
- by union FTE

What is Full-time Equivalent?

Employees in a company can have different working hours depending on their job position or employment status (e.g., full time versus part-time). Reporting on hours off does not present a problem; however, comparisons on days off can cause distortion unless a common denominator is used. This common denominator is the full-time equivalent.

Let's explain:

Company ABC has an FTE of 8 hours per day. The company has:

a full-time office employee working 8 hours per day, 5 days a week,
a part-time employee working 3 hours per day, 5 days a week, and
a shift worker, 12 hours per day, 3 days a week.

If each one of these employees booked 3 sick days, reporting would show as follows:

Total hours sick:	Full-time employee	= 24 hours
	Part-time employee	= 9 hours
	Shift Worker	= 36 hours
Total sick days:	Full-time employee	= 3 days
	Part-time employee	= 3 days
	Shift Worker	= 3 days

Because of the different working hours, in many instances, 3 days each is not a true comparison.

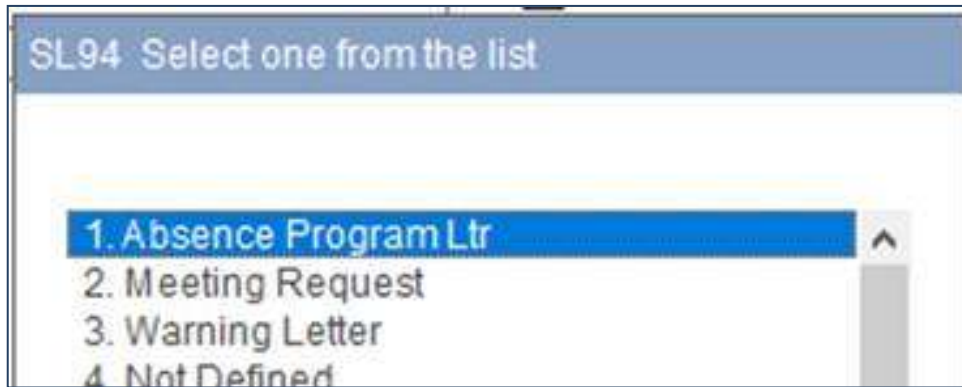
However, using FTE of 8 hours, the results represent a truer comparison.

Total FTE days:	Full-time employee	= $24 / 8 = 3$ days
	Part-time employee	= $9 / 8 = 1.1$ days
	Shift Worker	= $36 / 8 = 4.5$ days

In Attendance, you can define the FTE for the entire company and/or for each union.

Form Letter Templates

Form Letters can be used to send notices or letters to employees. To create up to 50 letters, click on **Options/Form Letter Templates** and select an undefined number.



Name your letter and then begin to compose the letter using text and variables.

CR86 FormLetter Templates

d) Name of FormLetter:

a) <Today-->

<First and Last Name-->

<Address-->

<City, Province-->

<ZipPost-->

Dear <First Name-->,

The Absence Support Program is designed to assist our employees in maintaining attendance in the work environment. We hope your full participation in the program will improve your attendance record.

Regular monitoring of current attendance and follow up by the Attendance Counsellor will occur weekly until your program has completed.

Regards,

[name]

[title]

cc Dept Manager

b) Variables

Today's Date
First Name
Last Name
First & Last Name
Address
City, Province
Country
Postal Zip Code
Foreign Phone
EE ID
Department Code
Department
Position
Supervisor
Telephone
Status
Union
Employment Date
Birth Date
Marital Status
Sex
Contact Name
Physician
Physician Address
Physician City
Physician Postal
Physician Phone
Health No.

To indicate the location of a variable:
1. Type ^ [Shift 6] in the letter.
2. [Tab] at this point will move cursor to Variables.
3. Click on or down/up arrows to variable name.
4. Select F4.
5. Variable will be inserted and cursor will return to the letter.


Page 1 F6
Page 2 F7
Page 3 F8

Select F4

f) Print Font Size: ☒ 9 pt ☐ 10 pt ☐ 12 pt Changing font size may require reformatting your letter. Be sure to print a sample.

Instructions F1 Pdf Print F5 List F2 Exit F12

Click the **Instruction F1** button to see detailed instructions and additional features in **Form Letters**.



Form Letter Templates

Introduction

Form Letters give you the means to set up letters that you repeatedly use. You set up the template of your letter once and from that point on, you can continually produce personalized letters with the appropriate information (variables) inserted. The personalized letter can be printed or emailed. With the click of the mouse a copy can be put into Documents Links.

Each template may be one to three pages in length.

How to Use

Select a template from the list.

For a new template, select the first 'Not Defined'.

On the blank screen, provide a name or description of the form letter template. Indicate if you will require a response when the actual letter is sent.

Under the title Variables is a list of the personalized information that can be inserted into the template,

In the Template on the left of the screen, type the text as it is to appear in the letter

Standard Review Dates

Standard Review Dates allow the setup of multiple sets of routine activities that are normally done when tracking or following up on a case.

CT3R Standard Review Dates

Go to **F1** General Standards
F2 Standard Reviews - Step 2
F3 Undefined Standards
F4 Undefined Standards
F5 Undefined Standards
F6 Undefined Standards
F7 Undefined Standards
F8 Undefined Standards

If you have the need to perform different activities depending on various scenarios, you may establish up to 8 sets of standard review dates. Otherwise, use F1 General Standards.

Exit F-12

Select a set identifier and enter a **Description** name for the set. You may enter routine follow-ups and identify the interval (number of days) in relations to the start date of the case. You may enter up to 50 pre-defined activities or procedures per set. The interval days will be used to determine the target date of the activity.

CT3S Standard Review Dates

Description General Standards

	Interval (Days)	Activity
1	7	ONE WEEK REVIEW
2	14	TWO WEEK REVIEW
3	30	ONE MONTH REVIEW
4	60	TWO MONTH REVIEW
5	90	THREE MONTH REVIEW
6		
7		

Once the Standard Review Dates are defined you may access the **Review Dates** panel of a case and click on **Standards** and the system will provide the list of sets. Once a set is selected, the system will auto-fill those standard activities and determine the target date for each.

Case Description Tables

There are four tables to be defined under **Description Tables**. Click on **Options/Description Tables** and complete each table.

In **Case Results** define the results of the support program, e.g., Return to Work, Assigned to Modified Work, LTD, or Terminated. To add a **Case Result** click on the No. field, if not activated, enter the next blank description number and press tab. Type in the text description and press tab. The **Case Result** will appear on the table to the right of the screen.

The screenshot shows the 'CR83 Define Table Entries' window. On the left, there is a 'Table no.' field and a 'Description' text box. Below these are four 'Go to' buttons: F1 Case Results, F2 Support Actions, F3 Level Effectiveness, and F4 Reasons. A note states: 'Maximum number of entries is 100. Never change the description of a table entry once it has been used. The results could be irrecoverable.' On the right, a list titled 'Case Results' contains 21 numbered items. Items 1 through 9 are populated: 1. Return to Work, 2. Assigned to Modified Work, 3. LTD, 4. Terminated, 5. Early Exit, 6. Advance to Step 2, 7. Advance to Step 3, 8. Continue in Step 3, and 9. Completed Program. Items 10 through 21 are blank. An 'Exit F12' button is at the bottom right.

To access the **Support Actions** setup table click on **Options/Descriptions Tables** and press **Support Actions**. In **Support Actions** define the actions that are normally taken or followed during the support process. e.g. weekly meetings with manager, physician visit, etc. To add a **Support Actions** click on the No. field, if not activated, enter the next blank description number and press tab. Type in the text description and press tab. The **Support Action** will appear on the table to the right of the screen.

The screenshot shows the 'CR83 Define Table Entries' window. On the left, there is a 'Table no.' field and a 'Description' text box. Below these are four 'Go to' buttons: F1 Case Results, F2 Support Actions, F3 Level Effectiveness, and F4 Reasons. A note states: 'Maximum number of entries is 100. Never change the description of a table entry once it has been used. The results could be irrecoverable.' On the right, a list titled 'Support Actions' contains 21 numbered items. Items 1 through 8 are populated: 1. Weekly Review, 2. Manager Meeting, 3. Physician Visit, 4. Medical Consultation, 5. Lifestyle Consultation, 6. OHS Referral, 7. EAP Referral, and 8. Attendance Coaching. Items 9 through 21 are blank. An 'Exit F12' button is at the bottom right.

To access the **Level Effectiveness** setup table click on **Options/Description Tables** and press **Level Effectiveness**. Level Effectiveness would apply to programs where there are several levels. To add a **Level Effectiveness** click on the No. field, if not activated, enter the next blank description number and press tab. Type in the text Description and press tab. The **Level Effectiveness** will appear on the table to the right of the screen.

The screenshot shows the 'CR83 Define Table Entries' window. On the left, there are input fields for 'Table no.' and 'Description'. Below these are 'Go to' buttons for F1 Case Results, F2 Support Actions, F3 Level Effectiveness (which is highlighted), and F4 Reasons. A note states: 'Maximum number of entries is 100. Never change the description of a table entry once it has been used. The results could be irrecoverable.' On the right, a list titled 'Level Effectiveness' shows a scrollable list of entries: 1. Satisfactory, 2. Good, 3. Excellent, 4. Unsatisfactory, 5. Advanced to Step 2, 6. Advanced to Step 3, 7. Advanced to Step 4, 8. Back to Step 3, 9. Back to Step 2, 10. Back to Step 1, 11. Exited at End of Step 1, 12. Exited at End of Step 4, 13., 14., 15., 16., 17., 18., 19., 20., 21. An 'Exit F12' button is at the bottom right.

To access the **Reason** setup table click on **Options/Description Tables** and press **Reason**. In **Reason** define the reason for the support program, e.g., excessive absence. To add a **Reason** click on the No. field, if not activated, enter the next blank description number and press tab. Type in the text Description and press tab. The Reason will appear on the table to the right of the screen.

The screenshot shows the 'CR83 Define Table Entries' window. On the left, there are input fields for 'Table no.' and 'Description'. Below these are 'Go to' buttons for F1 Case Results, F2 Support Actions, F3 Level Effectiveness, and F4 Reasons (which is highlighted). A note states: 'Maximum number of entries is 100. Never change the description of a table entry once it has been used. The results could be irrecoverable.' On the right, a list titled 'Reasons' shows a scrollable list of entries: 1. Excessive Absence, 2. Chronic Absence, 3. Discipline Issues, 4. There can be up to 50 characters in this field END, 5., 6., 7., 8., 9., 10., 11., 12., 13., 14., 15., 16., 17., 18., 19., 20., 21. An 'Exit F12' button is at the bottom right.

Time Markers

To setup the user-defined tables in Time Markers, from the main menu of Attendance and Absence Management, click **Options/Time Markers**. The panel will default to the **Wait Time** table. Select the next available **Table No.** and enter the text for the **Description** field.

The screenshot shows the 'Wait Times' configuration window. At the top right is an 'SF5 Print' button. On the left, there is a 'Table no.' field with a dropdown menu showing '1'. Below it is a 'Description' text box. At the bottom left, there are two buttons: 'Go to F1 Wait Times' and 'Go to F2 Notable Activities'. On the right, a list box titled 'Wait Times' contains a numbered list: 1. Medical Documentation, 2. Initial Clm Decision, 3. Supervisor's WA Plan Implementation, 4. Response to letter, 5., 6., 7., 8., 9., 10., 11., 12., 13.

Once complete, click **F2 Notable Activities**. Select the next available **Table No.** and then enter the text for the **Description** field.

The screenshot shows the 'Notables' configuration window. At the top right is an 'SF5 Print' button. On the left, there is a 'Table no.' field with a dropdown menu showing '1'. Below it is a 'Description' text box. At the bottom left, there are two buttons: 'Go to F1 Wait Times' and 'Go to F2 Notable Activities'. On the right, a list box titled 'Notables' contains a numbered list: 1. Initial Record Entry, 2. Phone Call with EE, 3. Phone Call with WSIB/Carrier, 4. Phone Call with Colleague, 5. Meeting with EE, 6. Update of WA Plan, 7., 8., 9., 10., 11., 12.

Define Employer's Hours

Under **Options**, select **Define Employer's Hours**. Enter the **FTE** hours per day and per week in terms of hours and minutes.

CR35 - Employer's Normal Working Hours

Hours Per Day (hhmm)

08:00

Hours Per Week (hhmm)

40:00

Full-time Equivalent

Employees in a company can have different working hours depending on their job position or employment status (e.g., full time versus part-time). Reporting on hours off does not present a problem; however, comparisons on days off can cause distortion unless a common denominator is used. This common denominator is the full-time equivalent.

Company ABC has an FTE of 8 hours per day. The company has a full-time office employee working 8 hours per day, 5 days a week; a part-time employee working 3 hours per day, five days a week; a shift-worker working 12 hours per day, 3 days a week.

If each one booked 3 sick days, reporting would show total hours sick as follows: Full-time employee = 24 hours; Part-time employee = 9 hours; Shift-worker = 36 hours.

Total sick days: Full-time employee = 3 days; Part-time employee = 3 days; Shift-worker = 3 days.

Because of the different working hours, in many instances, 3 days each is not a true comparison. However, using FTE of 8 hours, the results represent a truer comparison.

Total FTE days: Full-time employee = $24 / 8 = 3$ days; Part-time employee = $9 / 8 = 1.1$ days; Shift-worker = $36 / 8 = 4.5$ days.

You may define the FTE for the entire company and/or for each union.

Define Union Hours

Under **Personal Data**, make sure the Union field is completed for each employee, and the wording is consistent for each union.

Under **Options**, select **Define Union Hours**. Click on **Build Union Table**. This will take a few minutes to scan the employee records and summarize the unions into a table. A list of all the unions will appear showing the number of employees in each union. No Union shows the number of employees who are not in a union. Beside each union, enter the **hours per day** that equate to a full-time equivalent (e.g., 730, 800).

You can rebuild your union table anytime. The current FTE's will remain.

The employee count for each union is "as of" the last time you built the table.

CR45 - Enter Working Hours By Union

F5 Work sheet

Union	Hours Per Day	Count
NON UNION	800	44
UNION A	800	84
UNION B	800	39
UNION C	800	29

Union Hours:

Under Personal Data, make sure the Union field is completed for each employee, and the wording is consistent for each union.

Click on the Build Union Table button. This will search the employee records and summarize the unions into a table. A list of all the unions will appear showing the number of employees in each union.

No Union shows the number of employees who are not in a union.

Beside each union, enter the hours per day that equate to a full-time equivalent (e.g., 730, 800).

You can rebuild your union table at anytime. The current FTE's will remain.

The employee count for each union is as of the last time you built the table.

Employee Counts are as of 15 Aug 23.

Build Union Table F1 Exit F12

View First/Last Time Dates

Identifies dates of the time entries entered into this module.

CR01 Time Entries Dates

The date range of the time that has been recorded in this module is:

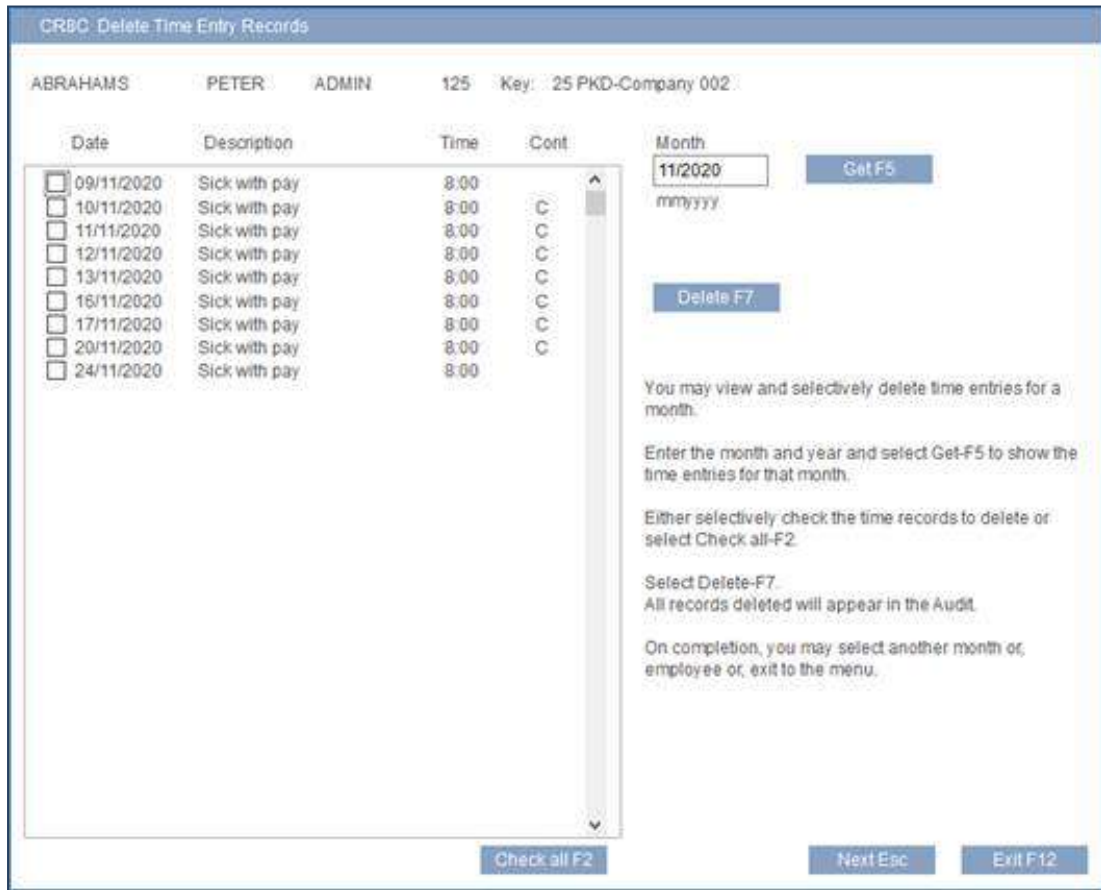
From To

01 Jan 03 28 Jul 23

Exit F12

Delete Time Entry Records

To delete multiple time entries for one employee, select **Delete Time Entry Records** under Options. Select the employee to open the deletion panel. Enter the month and year (mmyy) and select Get F5. All time entries will be displayed.



CRBC: Delete Time Entry Records

ABRAHAMS PETER ADMIN 125 Key: 25 PKD-Company 002

Date	Description	Time	Cont
<input type="checkbox"/> 09/11/2020	Sick with pay	8:00	
<input type="checkbox"/> 10/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 11/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 12/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 13/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 16/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 17/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 20/11/2020	Sick with pay	8:00	C
<input type="checkbox"/> 24/11/2020	Sick with pay	8:00	C

Month: 11/2020
mmyyyy

Get F5

Delete F7

You may view and selectively delete time entries for a month.

Enter the month and year and select Get-F5 to show the time entries for that month.

Either selectively check the time records to delete or select Check all-F2.

Select Delete-F7.
All records deleted will appear in the Audit.

On completion, you may select another month or employee or, exit to the menu.

Check all F2

Next Esc

Exit F12

Manually check the time entries to be deleted or select **Check All F2** and select **Delete F7**. The deletion will be confirmed and the panel will refresh with the remaining time entries for that month and year. Deletions will be noted on module audit reports.

Reassign Managing Staff on Review Dates

As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field for all outstanding Review Date records from one User ID to another. In the case of a temporary reassignment, the records can be reassigned back to the original user or another user.

Under **Options** select **Reassign Managing Staff on Review Dates**. Select the intended procedure by clicking on the radio button. Type or select the User ID of the Managing Staff the records will come from, then type or select the User ID of the Managing Staff the records will be reassigned to and press Continue F5.

A question box will appear asking for confirmation of the reassignment.

Once the utility is complete, a report will be generated which provides the details of the reassignment.

PKD-Company 1					Page: 0001 R3L
Attendance					Date: 30 Mar 17
Review Dates Reassigned from DOUG to SARA					Time: 11:30
Temporarily Assign					
Employee	Start Date	Date	To Be Done	Key	
AARON, PETER 125 tF/t	14 Nov 16	27 Mar 17	MEETING WITH EE RE ATTENDANCE	25	

Import Time Entries

Time Entries can be imported from your Payroll or Human Resources (Corporate) system.

In one run, you can import time entries for any time frame – be it for one day or multiple days.

Your system will allow up to ten time entries per day for each employee.

Considering multiple time entries can be entered for one day, your system will add all entries to the file...even if there is already what appears to be a matching time entry on file. Keep this in mind and never import the same file twice.

If costs are not included on the import file, your system will use the employee's salary to calculate the cost for each time entry. Costs can be imported without having any time recorded.

Record Layout For Import

The layout should be given to whomever is responsible for exporting the data out of the corporate system for import into the **Attendance** module. It is imperative that the specified format be used. Print the **Record Layout** by selecting the **Transfer** function followed by the **Record Layout For Input** function. (Sample on Page 21)

Define Time Translations

As the corporate system may not use the same time codes as you have specified in the Attendance Module, a translation of these codes would be necessary. This is accomplished by the **Define Time Translations** function. Simply enter the codes used by the corporate system and match these codes to the result codes that you have set up in the Attendance Module.

CR08 - Define Translations For Down-load

Print

Download Code	Translates to time code from list	Time Codes
1 123	42 SPARE 42	1 Sick with pay
2 302	11 Stat Holiday	2 Sick pay cover
3 517	20 Bereavement	3 Sick pay Chronic
4 789	19 Lateness no pay	4 Sick no pay
5 90	11 Stat Holiday	5 Sick no pay covered
6 AA	1 Sick with pay	6 Sick no pay overtime
7 AB	1 Sick with pay	7 Vacation
8 AC	1 Sick with pay	8 Vacation covered
9		9 Vacation overtime
10		10 Training/Education
		11 Stat Holiday
		12 Birthday
		13 Lieu Day
		14 Company Business
		15 Book off with Permission
		16 Book off no Permission



Attendance Import Record

File Name: Hstima.Txt

File Format: ASCII (unlimited)

Record Length: 49 Characters

Records must not include any field delimiters. A CR & LF (Carriage Return and Line Feed) is required at the end of each record.

[Click Here](#) to download layout to PDF.

Record Layout:

No	Description	Alpha/Numeric	Size	Comments
1	SIN/SSN or Employee ID	A	9	
2	Date of Time Entry	D	8	Format In Canada = ddmmyyyy In the U.S.A. = mmddyyyy
3	Type of Time Entry	A/N	10	
4	Time	N	4	Define as hours and minutes – hhmm
5	Continued	A	1	Y if time is a continuation
6	Cost	N	6	\$\$\$\$cc. decimal is implied
7	Adjustment	A	1	Y = Time (and costs) on this record are to be subtracted from an existing time entry in the Parklane System A = Time on this record will be added, but costs will not be calculated if cost field is zero. B = Time (and costs) on this record are to be subtracted from an existing time entry in the Parklane System, but costs will not be calculated and subtracted if cost field is zero.
8	Department	A/N	10	Optional. Use if department is other than 'home'. Must be valid in Parklane or system will default to 'home' department.

Cost:

This is the cost of the time entry in terms of number of hours * hourly rate.

(Depending on the type of time entry, costs at reduced rates are allowed).

This field is optional and may be left blank.

If Cost is zero on the import file, the system will compute cost using the current salary on the Personal Data Record. (Unless Adjustment = A or B)

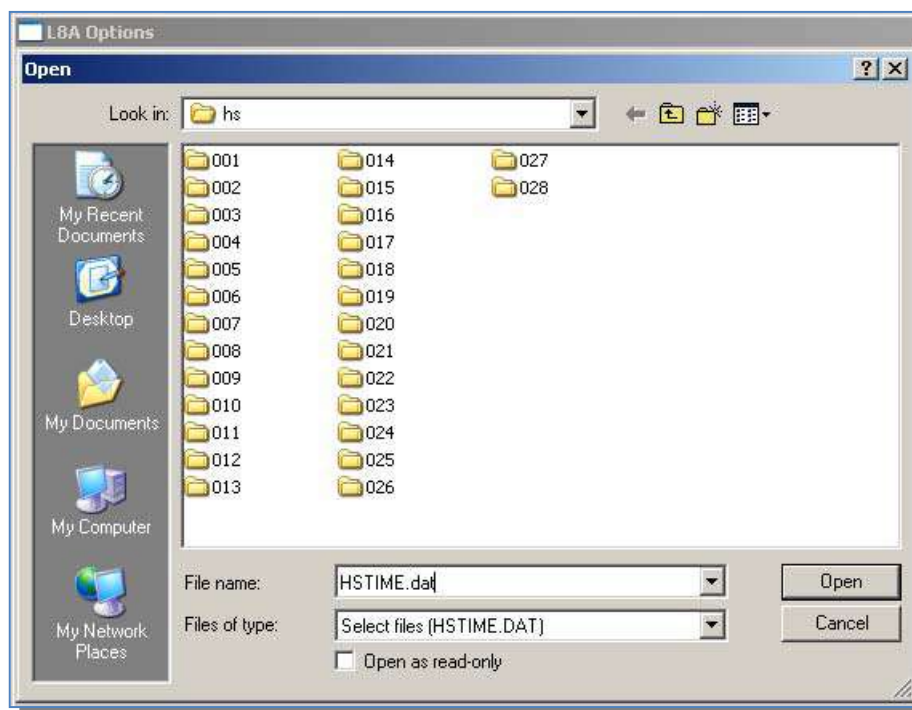
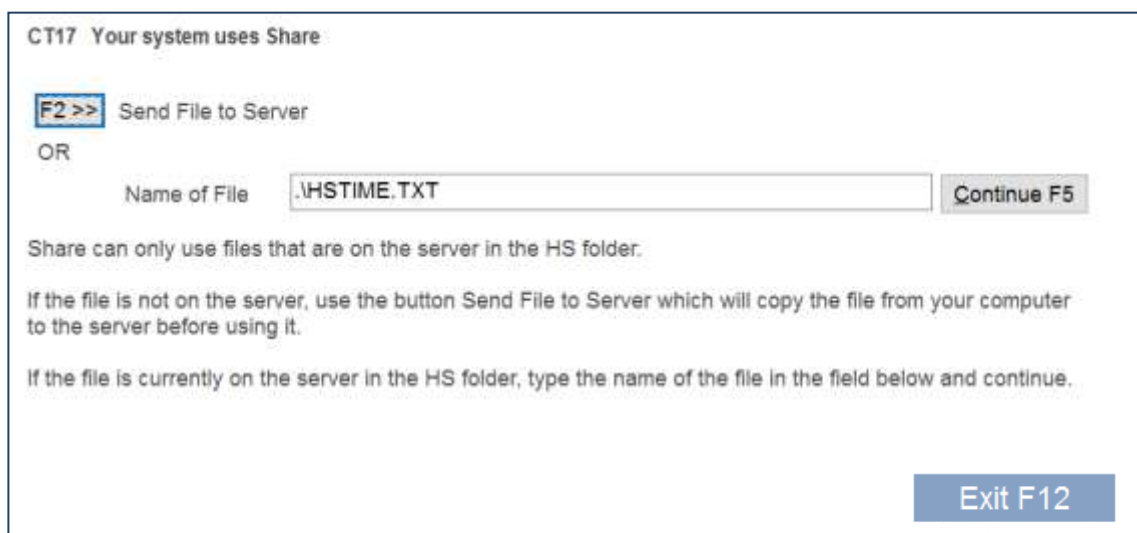
The system will allow a time record that has costs with no hours.

Note: A maximum of 10 time records are allowed per day for each employee.

Times entries with the same time code for the same day will be added together resulting in 1 record.

Print Time File

Prior to importing the **Time Entries**, you can print the contents of the **Time File** to visually inspect the contents. Print the Time File by selecting the **Transfer** function followed by the **Print Time File** function. Select the drive in which the file resides. Then select the HSTIME.dat file.



The system will ask you to select an option for printing by pressing the corresponding push button.

SL42 Select one option

F1 Print all records
F2 Print first 4 records
F3 Print a specific SIN

Single click on option or press Function key

GoBack Esc Exit F12

The file will appear on screen with the option to send to the printer.

PeriTime Demo Data Page: 0003 R37
Attendance Date: 10 May 06
Time Transaction Listing From C:\Documents and Settings\Owner\My Documents\jsttime.dat Time: 12:28

Rec#	S.I.N.	Date..	Code.....	Time	Cost..	Adjust.	Department
1	111-111-118	01082002	A	0730	010500		
2	111-111-118	02082002	B	0500	007500		
3	111-111-118	06082002	C	0730	011000		

Run Import Time Transfer

To begin importing the Time Entries, select the **Transfer** function followed by Run Import Time Transfer. The system will give the option to update the files or to do a trial run to ensure no anomalies exist in the incoming data.

SL42 Select one option

F1 Have system update the files
F2 Do a trial run with no update

Transfer Days Lost to WCB or Disability Management

Determine if you are going to record WCB or Disability Management related absenteeism in the Attendance Module that can be transferred to the Incident Reporting or Disability Management Modules.

If you plan to do this, code your time entry (Options, Define Time Entry Descriptions and select the appropriate type) with a type WCB days, WCB hours, or DsManager. The transfer routine only picks up the time entries that have these specific type codes.

WCB days vs WCB hours

- WCB days will calculate the number of days with entries (regardless of the number of hours Absent). The total number will be transferred to the Days Lost panel in the Incident Reporting module.
- WCB hours will calculate the number of days absent by adding the total number of hours absent and dividing the total by Daily hours (from Personal Data). This total will then be transferred to the corresponding month. (ie. 30 hours absent divided by 6 hours per day = 5 days)

WCB Days Lost will be allocated to appropriate claims based on date,

DSManager

- DSManager will calculate the number of days with entries (regardless of the number of hours Absent). The total number will be transferred to the Days Lost panel in the Disability Management module

Disability Days Lost will populate the most current claim.

Description	5 & 2 Character Abbreviations	Off or At Work	Type	Authorized
1 Sick with pay	SICK S1	Off work	Sick	Unauthorized
2 Sick pay cover	SICKC S2	Off work	Sick	Unauthorized
3 Sick pay overtime	SICKO S3	Off work	Statutory	Unauthorized
4 Sick no pay	SKNP S4	Off work	Vacation	Unauthorized
5 Sick no pay covered	SKNPC S5	Off work	LOA	Unauthorized
6 Sick no pay overtime	SKNPC S6	Off work	WCB days	Unauthorized
			WCB hours	Unauthorized
			DsManager	Unauthorized
			LTD	Unauthorized
			Other	Unauthorized

This process eliminates the requirement to enter Days Lost in the Incident Reporting and Disability Management Modules and therefore, saves valuable entry time.

Manual Time Entries

Go to **Do Time/Open Employee Time** or select **1. Calendar** from the Sidebar menu. Select the appropriate **Employee**. Time entries are entered with the use of a calendar. The calendar for the current month will appear. Go to the correct month by using the arrow buttons.

Time entries can be entered using the **Mouse** or the **Keyboard**. Click on the correct day or using the keyboard, use the arrow keys to select the correct day.



CR02 Calendar

Go to: **SF4**

August 2023

a) Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 SICK 8:00	2 SICK 8:00 C	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Use Arrow Keys to move cursor around calendar

Hours Per Day 08:00

Calendar Legend:
 C = Time continued
 Y = Multiple time entries
 A = Comments entered for day
 S = Substitute

F4 Repeat last time entry recorded **F8** Comments for day
F9 View all time for one day **F7** Was a substitute for

F2] Time Codes

1 Sick with pay	1:00
2 Sick pay cover	1:15
3 Sick pay Chronic	1:30
4 Sick no pay	1:45
5 Sick no pay covered	2:00
6 Sick no pay overtime	2:15
7 Vacation	2:30
8 Vacation covered	2:45
9 Vacation overtime	3:00
10 Training/Education	3:15
11 Stat Holiday	3:30
12 Birthday	3:45
13 Lieu Day	4:00
14 Company Business	4:15
15 Book off with Permission	4:30
16 Book off no Permission	4:45
17 Union Business	5:00
18 Lateness paid	5:15
19 Lateness no pay	5:30
20 Bereavement	5:45
21 Medical Appointment	6:00
22 Jury Duty	6:15
23 Maternity/Paternity	6:30
24 Leave of Absence	6:45

F3] Time

Select F6
 To select time code, move cursor to time code and select bottom.

Calendar Legend:
 C = Time continued
 Y = Multiple time entries
 A = Comments entered for day
 S = Substitute

Navigation:
 [Ctrl Enter] Go to another panel
 [Ctrl X] Go to field x
 <<Panel CtrlQ Panel>> CtrlW Next Person Esc Home F11 Menu: F12

Under Time Codes, click on the required entry.

The time code will appear on the day that was selected. Your system will default to a full day and insert the hours from the **Personal Data** record.

To override these hours, click on the correct hours from the **Time** column and select the hours to override.



The lower right corner located in each day is reserved for four (4) codes:

- C = The hours shown for this day are a continuation
- Y = There are multiple time entries for this day
- A = There are comments for this day
- S = The hours represent substitution for another employee

Calendar Legend: C = Time continued Y = Multiple time entries A = Comments entered for day S = Substitute	F4 Repeat last time entry recorded	F8 Comments for day
	F9 View all time for one day	F7 Was a substitute for

Time Continued

When an employee is off more than one day, the time entries for all subsequent days must be flagged as “continued”. Make sure you indicate time entries that are a continuation as such. Any time a time entry is not marked, “continued”, it is treated as a new occurrence and your statistics may be distorted.

If there is a continuing time entry, move the cursor to the next day and select **F4-Repeat last time entry recorded**. This will indicate a continuation of this occurrence of absence by repeating the previous time entry and putting a “C” in the bottom right corner of that day.

CR02 Calendar

Go to

August 2023

a] Sunday	Monday	Tuesday	Wednesday	Thur
		1 SICK 8:00	2 SICK 8:00 C	3
6	7	8	9	10

F4 Repeat last time entry recorded

Multiple Time Entries

In some cases, an employee may have more than one absence issue in a day. For example, the employee may have been late for work and sick later the same day. Multiple time entries may be entered for one day.

To add or view additional time entries for one day, move the cursor to the correct day and select **View all time for one day**. A window will appear allowing additional time entries.

F9 View all time for one day

CR02 Calendar

August 2023

a] Sunday	Monday	Tues
		1
6	7 LATEP 1:00 Y	8
13	14	15

CR02a Time entries for one day

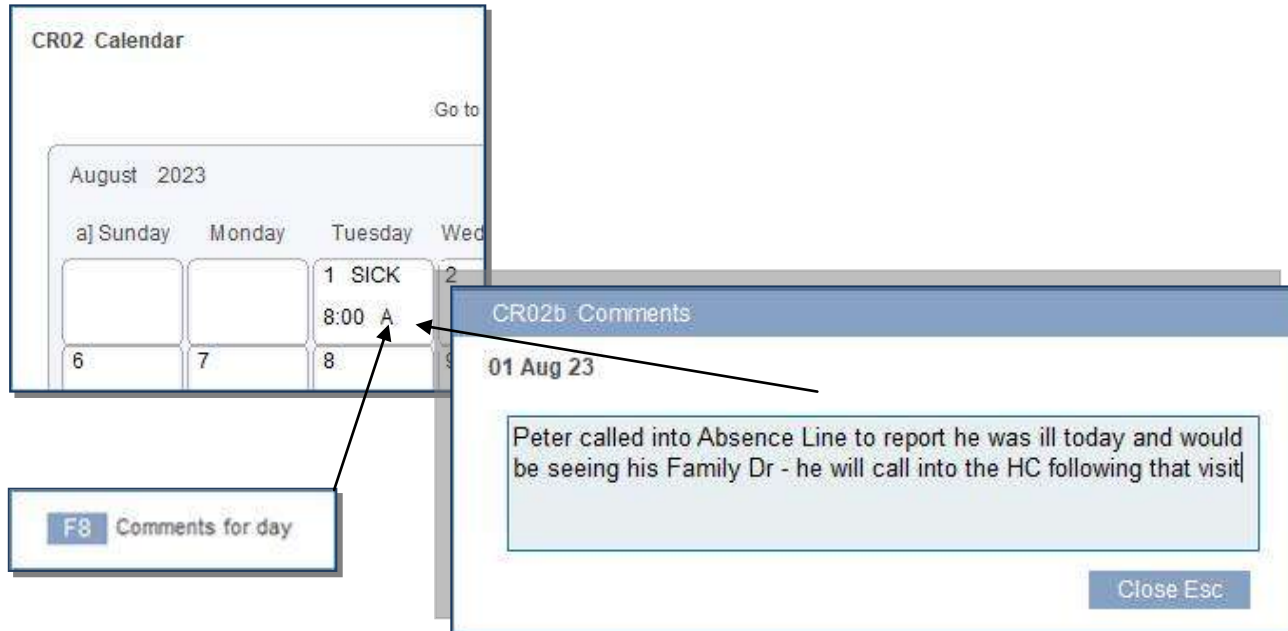
07 Aug 23

Code	Description	Time	Costs	Cont.	Department	Source
18	LATEP	1:00	32.00		ADMIN	Manual
10	TRAIN	4:00	128.00		ADMIN	Manual

Comments Entered For Day

Comments may be entered regarding an absence. There are two ways to enter comments. On the employee **Calendar Panel** or the **Calendar Comments** panel.

On the employee calendar panel move the cursor to the correct day and click on **Comments for Day**. A window will appear for that day where you may enter up to four lines of comments. Click on **Close-Esc** to return to the employee calendar screen.



An alternative way to enter or access comments is via the Sidebar menu. Select an employee and open the **Calendar**. Click **Calendar Comments** from the Sidebar. The first available blank comment box will default to the current date. Tab to the text box and enter up to three lines of comments.

Substitute

Substitute is a useful tool if your organization requires replacement personnel for employees who are absent. You can link time worked by a substitute to the time booked-off by the absent employee. Where a substitute replaces more than one employee in a day (for example: 3 hrs for one and 5 hours for another) Sub-Links can link the substitute worker to multiple employees for one day. With Sub-Links, you can identify your actual absent costs by including the costs of replacement workers. You can compare time booked by substitute with the time booked-off by the absent employee.

On the employee calendar click **Was a substitute for**. Linking is always done on the substitute's calendar, not the other way around. When the time worked by the substitute has been entered, press the Sub-Link button. A pop-up window will appear.

In this window press **F6** and select the person who was absent. Click on the Comment box to enter a comment if necessary. Up to three subs can be entered.

If the substitute replaced more than one employee for a day, continue and enter 2nd Sub and 3rd Sub.

Note: Always enter the link under the substitute employee.

You must indicate a link for each day. If a substitute works multiple days in a row, the system cannot assume that the substitute was replacing the same employee every day.

When you link a substitute to another employee, the system does not check for absent time entered for that employee. The reason being that **Attendance & Absence** allows you to enter employee time in any order. Checking for absent time would force you to enter time in a certain order. Report R46 Missing Time for Links will show you where time is missing for linked employees. This report is located under the Employee Reports drop down menu by clicking on Substitutes.

Document Folder

The **Document Folder** feature allows the user to paste text documents or type notes for future review. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a MS Word document). The format of the document may vary slightly from the original document. Once a document is entered, changes may be made until midnight and only by the original author. The **See List** button lists all documents in the Document Folder.

Access to the **Remove** function is controlled by Security. **Remove** will delete the document from the Document Folder.

The screenshot displays the 'CR2B Document Folder' window. At the top, there are four buttons: 'F4 Add Record', 'F2 See List', 'F5 Print', and 'F7 Remove'. Below these buttons is a 'Reference' field containing the text 'Notes from Aug 1/23 Mgr Mtg'. To the right of the reference field are two navigation buttons, '<' and '>'. Below the reference field is a large text area containing the following text: '- met with Peter today regarding recent absences - discussed next steps if absent again in the next 3 months - will be triggered into Absence Support Program - Peter understands and will strive for better attendance moving forward'. A small upward arrow icon is visible at the bottom right of the text area.

Document Links

The **Documents Links** feature allows the user to link and view electronic documents that are related to the employee.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

In Attendance & Absence, documents are linked directly to the case. Move the cursor to the **Origin** column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **View**. The system will call up that document. Up to 800 documents may be linked to one case.

Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.

CTL1 Document Links

No of Links: 1

No.	User	Date	Origin	Doc Date	Description
1	SARA	15/08/2023	HR	01/08/2023	Notes from Mgr Mtg
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

Link F4

View F2

GoToBlank F9

FileName F3

Link url SF1

Go to Links:

001-100 F6

101-200 F7

201-300 SF3

301-400 SF4

401-500 SF5

501-600 SF6

601-700 SF8

701-800 SF9

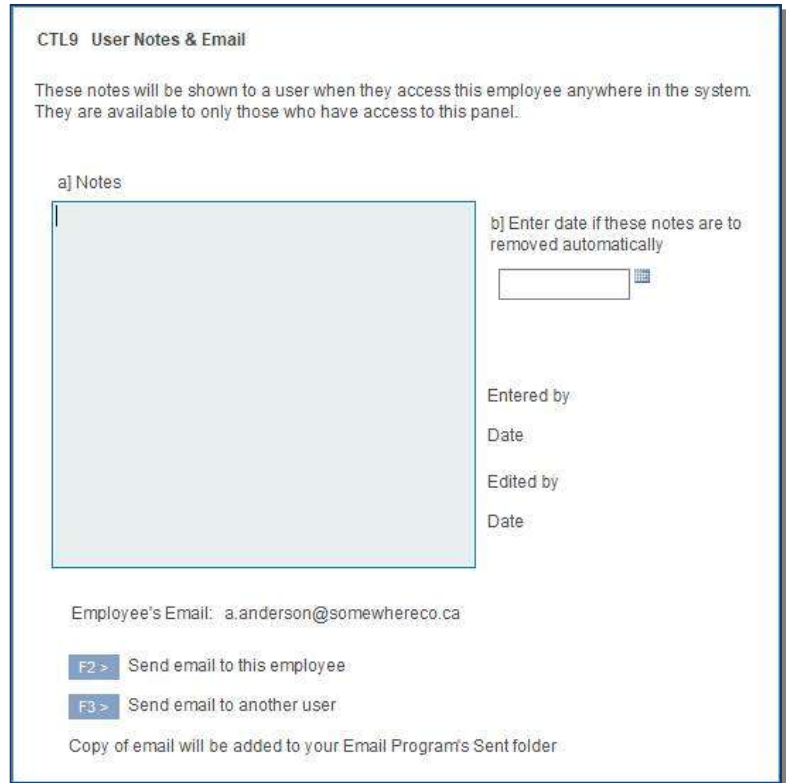
*Indicates no document was linked; x = Document may not be deleted.

SF7 Remove Link

User Notes & Email

The User Notes & Email panel provides three features:

- A Note area to enter text, which will globally pop-up in any module opened for the specific employee. The system will auto-fill the original user name and date entered, along with user name and date of most recent edit. A date field is also provided to automatically remove the note if time sensitive.
- **F2 Open mailto to send email to this employee** wherein an email will open applying the employee email address from Personal Data. If no email address exists in Personal Data for the employee, a completely blank email will open. Proceed by entering Subject and the email text.
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program's sent folder.



CTL9 User Notes & Email

These notes will be shown to a user when they access this employee anywhere in the system. They are available to only those who have access to this panel.

a) Notes

b) Enter date if these notes are to be removed automatically

Entered by

Date

Edited by

Date

Employee's Email: a.anderson@somewhereco.ca

F2 > Send email to this employee

F3 > Send email to another user

Copy of email will be added to your Email Program's Sent folder.

Security controls which users will see the note when accessing this employee or their records.

Demographics

The **Demographics** panel provides a read-only pop-up of the employee's general demographic information. The Demographics panel is available in various module records for easy reference. **Security** controls which users will have access to the Demographics pop-up on module by module basis.

CT35 Demographics	
Surname ABRAHAMS	Department Fairmont PS - Teacher
Given Name PETER	Employee Id. 125
Address 210 ANGELA STREET	Status Full-time
City, Prov.State LONDON, ON	Position TEACHER
Country CANADA	Hire Date 01/01/2003
Postal.Zip Code N4K 1R9	Union UNION A
Home Phone 519 432-0087	Supervisor KANE, MAE
Business Phone 519 672-9834	MANAGER
Foreign No. 226-300-7784	
Birth Date 31/10/1980	Daily Hours 8:00
Age 42	Weekly Hours 40:00
Sex Male	Work Hours 7:00 to 16:30
Marital Status Married	Miscellaneous MISC #1
Language ENGLISH	Key 25
Email p.abrahams@somewhereco.ca	

In A Nutshell

The **In a Nutshell** panel provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

Depending on the user's **Security** access, checkboxes provide access to more detailed record information. The "R" checkbox opens the actual record and the "C" checkbox opens the General Comments related to the record. In the case of Incident Reporting, Disability Management, Work Accommodation we can see the most recent five records. Attendance Management will show the most recent twenty-five records, as well as an indicator and date if the employee is in an Attendance Case Management Program. The date of the last Health Centre visit is provided from the Chart module.

CTLA Employee Records in a Nutshell

Click check box under *R to access actual record
Click check box under *C to view general comments

Incident Reporting Last 5 recorded incidents showing (excludes hazards)

Inc. Date	Class	Expect Rtw	Rtw Date	ModDuty Dt	Department	Injury	Status	Days	a)	*C *R
13/03/2023	Reo				56883	RT KNEE ABRASION	Per		<input type="checkbox"/>	<input type="checkbox"/>
01/03/2023	LT	06/03/2023	28/06/2023	29/06/2023	56883	RT KNEE ABRASION	App	65.00	<input type="checkbox"/>	<input type="checkbox"/>

Disability Management Last 5 recorded claims showing

First Day Off	Type	Expect Rtw	Rtw Date	ModDuty & Dt	Department	Description	Days	b)
16/08/2022	Std	26/08/2022	02/12/2022	Yes 02/12/2022	884403	LT ANKLE SPRAIN 23124	78.00	<input type="checkbox"/>
22/04/2019	Std	04/11/2019	04/11/2019	Yes 01/10/2019	ADMIN	low back strain	140.00	<input type="checkbox"/>

Work Accommodation Last 5 recorded programs showing

Start Date	Occ?	Est. Stop	Est. Term	Completion	Act. Term	Department	Result	d)
12/04/2021		07/05/2021	4 Weeks	07/05/2021	4 Weeks	ADMIN	RTW FULL DUTIES	<input type="checkbox"/>
20/01/2020	Yes	14/02/2020	4 Weeks	14/02/2020	4 Weeks	ADMIN	RTW FULL DUTIES	<input type="checkbox"/>

k) Attendance Last 25 time records showing

Date	Day	Department	Type	Hours	Cont.
01/08/2023	Tue	56883	Sick with pay	8:00	<input type="checkbox"/>
12/09/2022	Mon	884403	Substitute	8:00	<input type="checkbox"/>
24/08/2022	Wed	884403	Test 100	8:00	C
23/08/2022	Tue	884403	Test 100	8:00	C

f) Date of Last Health Center Visit 06/03/2023 ☐

g) Access Personal Data record ☐

End Date of Last Case 09/04/2021

TMB Audit Report

The TMB Audit Report provides several options to sort and generate audit reports related to entered data.

SL42 Select one option

F1 Sort by Date

F2 Sort by Fields

F3 Sort by User

Single click on option or press Function key

Exit F12

Employee Calendar

From the menu, click on **Do Time/R05 Calendar**. Select all or specific time entries, enter the month and year, followed by the employee selected. The system will then produce a report which includes the month selected and the previous eleven months. The calendar can have any month as year-end to facilitate fiscal year reporting.

SL42 Select one option

F1 Show all types of time entries

F2 Select time entries

SL42 Select one option

F1 Preview calendar prior to printing

F2 Skip preview, print only

SL59 Enter months for selecting records
Year End Month For Calendar

Starting Month mmyyyy

Ending Month

Future dates are allowed

PKD-Company 002 Attendance Calendar		ABRAHAMS, PETER Fairmont PS - Teacher P_Fulltime Key: 25		Date: 15 Aug 23 R05 Time: 11:30	
January, 2023			July, 2023		
Sun	Mon	Tues	Wed	Thur	Fri
Sa					
8					
15					
22					
29					
February, 2023			August, 2023		
Sun	Mon	Tues	Wed	Thur	Fri
5					
12					
19					
26					
March, 2023			September, 2023		
Sun	Mon	Tues	Wed	Thur	Fri
5					
12					
19					
26					
April, 2023			October, 2023		
Sun	Mon	Tues	Wed	Thur	Fri
2					
9					
16					
23					
30					
May, 2023			November, 2023		
Sun	Mon	Tues	Wed	Thur	Fri
7					
14					
21					
28					
June, 2023			December, 2023		
Sun	Mon	Tues	Wed	Thur	Fri
4					
11					
18					
25					
Sun	Mon	Tues	Wed	Thur	Fri
3					
10					
17					
24					
31					

Case Management Sub-Module

Attendance can track employees whose absenteeism has been excessive and requires specific observation on behalf of your company. Your company may have a **Case Management Program** in place or you may simply wish to have follow-up meetings on a regular basis. Either way, **Attendance & Absence** can accommodate both.

This sub-module will manage different levels of support to suit your **Case Management Program**, track tasks to be done and provides “To Do” lists, produces form letters, and tracks continuing time off. All functions regarding Case Management are under the item **Cases** on the **Attendance & Absence Menu**.

Options

Before the **Cases** feature can be used several tables need to be defined under the **Options** drop down. The **Form Letter Templates**, **Standard Review Dates**, **Case Description Tables** and **Time Markers**.

New/Open Case

To add an employee into a support program, click **Add New Case**. To view a support program that was previously entered, click **Open Case**. Select the employee.

The Directory for this record will appear. There are six (6) panels for tracking an employee.

Case Description

The case opens to the **Description** panel. Enter the start date of the program. Beside **Time Entry Start Date**, enter the first date of the time frame which triggered the employee into the program. This date is crucial, as the system requires it for proper reporting.

CR71 Case Description

Current Level: Level Managing Staff: SARA F7 ☐ Closed

a) Start Date: 22/05/2023

Time Entry Start Date: 01/01/2023

Supervisor: ROBERT ANDERSON F1

Department: L&L 2010 F2
Logistics

Reason: Excessive Absence F6

Monitor Assigned to: SARA KANE F3

d) Completion Date:
Result: F4

b) Comments

(1000 characters)

System Key: 000072

Entered: 25/05/2023 SARA SFT Cancel Record

Case Levels

Those companies that have multiple steps in a program can use the **Case Levels** panel. Attendance can track up to ten (10) levels.

CR72 Case Levels

This Level 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐

Current Level 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐

f) Go To Level Go F5

a) Start Date 01/07/2023

Projected Duration 3 Months

Projected Completion 30/09/2023

b) Completion Date ☐ Final Level

Actual Duration

Effectiveness/Result F7

Actions F6

Weekly Review

d) Comments

Case Time Accumulation

The **Time Accumulation** panel shows the targeted hours the employee has accumulated between levels. In order for this panel to operate properly, you must define the time codes being tracked. Selecting the **F1** button will open a window for selecting the time codes.

CR73 Case Time Accumulation

Time Tracking Start Date 01/01/2023

Hours Accumulated Prior to Level 1 80.00

Level	Start Date	Hours Accumulated	Time entries that are being tracked
Level 01	01/07/2023	17.00	Sick with pay Sick pay cover Sick pay Chronic Sick no pay Sick no pay covered Sick no pay overtime Lateness paid Lateness no pay
Level 02			
Level 03			
Level 04			
Level 05			
Level 06			
Level 07			
Level 08			
Level 09			
Level 10			

F1 Select or reselect the time entries that are being tracked for this case.

On the left side of the screen double click the **Time Code** to be tracked. That time code will populate the table to the right of the screen.

F1 Select or reselect the time entries that are being tracked for this case.

Sick with pay

Sick pay cover

Sick pay Chronic

Sick no pay

Sick no pay covered

Sick no pay overtime

Vacation

Vacation covered

Vacation overtime

Maximum 30 Selected 1

Sick with pay

Case Comments

Case Comments are used to enter any miscellaneous notes or comments. The number of comments is unlimited.

CR74 Case Comments

<
<
>
F5 Print

Date	Comments
15/08/2023	- met with employee today to discuss ongoing absences while in a Support Program
15/08/2023	

General Comments

General Comments provides a larger comment area with the option of moving to the First or Last page of comments using function buttons. If comments are changed, the panel will track the User, Date and Time of the change. The panel also tracks the number of comment pages as well as the Date of the First and Last comment.

The screenshot displays the 'CTM1 General Comments' window. At the top, there are two function buttons: 'F2 Add Record' and 'F6 Print'. The main area is a large text input field titled 'General'. To the left of this field, there are several labels and input fields: 'Date' with a date picker showing '15/08/2023', 'Entered' with the text 'SARA', '15/08/2023', and '11:46', 'Changed', 'First & Last Comment Dates', 'No. of Comments', and a note stating 'This session's additions are not included in the counts and dates.' To the right of the text area, there are navigation buttons '<' and '>', and text indicating '< Page Up' and '> Page Down'. A warning message on the right states: 'Any comments that you add can be changed by you until midnight. After that, changes will be prohibited.' At the bottom right, a character count '(2500 characters)' is visible.

Review Dates

Activities or follow-ups for an employee may be tracked under **Review Dates**. Pull pre-defined reviews by clicking **Standards F6** or click on **Add Activity**. Enter a date of the activity and tab to the User ID. The **User ID** will auto-fill based on the user currently logged into the system. The User responsible for completing the activity may be changed by clicking on the arrow at the top of the User ID column or by clicking the **ReAssign F9** button at the right of the panel. Tab to the **Activity** field and enter text instructions related to the activity. The **Done** checkbox will auto-fill a review date item, stamping it with today's date and the User ID of the user currently logged into the system.

	Date	User Id	SF1	Activity	Done	Details
1	08/07/2023	SARA		ONE WEEK REVIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	15/07/2023	SARA		TWO WEEK REVIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	31/07/2023	SARA		ONE MONTH REVIEW	<input type="checkbox"/>	<input type="checkbox"/>
4	30/08/2023	SARA		TWO MONTH REVIEW	<input type="checkbox"/>	<input type="checkbox"/>
5	29/09/2023	SARA		THREE MONTH REVIEW	<input type="checkbox"/>	<input type="checkbox"/>

The **Details** checkbox will open a panel which allows the user to enter the **Action** taken for the Activity, and a **Completion Date**. Do NOT click the **Done** check box, the system will auto-fill.

Archive SF4 will place completed review dates in an accessible spreadsheet.

Several reports are available related to Personal Data Review Dates.

CR4A Activity Details

Target Date: 15/07/2023

User: SARA

Activity: TWO WEEK REVIEW

Action: Completed on 15 Aug 23 by SARA ☒ Done

Completion Date: 15/08/2023

Close F12

Form Letters

To generate a form letter for an employee click on **Get Template** and select from the drop down list provided. The variables associated with the chosen template will auto-fill as the form letter is displayed. Text may be inserted or deleted throughout the letter is required. Doing so will not change the master form letter template content. Each letter may be a maximum of three pages in length.

Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

Clicking **Link Doc** will store the letter for future reference on the Document Links panel of the record.

By entering a **Reply Due Date** and clicking on **Add Reminder**, the system will add an activity to the Review Date panel of the record.

When a form letter appears outdated, click **Reset Letter** to initialize the panel to the master form letter template content.

To send the letter, click **SF8 Email letter to**: This opens a panel in which the worker's email address will auto-fill, allow for the additional recipients and provide editable text indicating the Form Letter is an attachment to the email. Ten additional attachments may be sent with the letter by clicking attach File F9 or Doc Link SF9 and selecting a file from the browser or from the list of document links. A copy of the letter, a copy of the email and a copy of each additional attachment will be automatically added to Document Links. The emailed Form Letter, the Letter Attachment and all additional attachments will be recorded in the TMB Audit.

CR78 Form Letters

F8 Get Template F5 Print PDF SF5 Link Doc F8 Add Reminder F7 Reset Letter

Aug 15, 2023

Peter Abrahams
210 Angela Street
London, ON
N4K 1R9

Dear Peter,

The Absence Support Program is designed to assist our employees in maintaining attendance in the work environment. We hope your full participation in the program will improve your attendance record.

Regular monitoring of current attendance and follow up by the Attendance Counsellor will occur weekly until your program has completed.

Regards,

Sara Kane
HR Manager

cc: Dept Manager

Emailed on - Aug 15, 2023

Letter No. 1
Title Absence Program Ltr

Due Date
Last Printed

SF8 Email letter to:
p.abrahams@somewhereco.ca

P1 F2 P2 F3 P3 F4

Document Folder

The **Document Folder** feature allows the user to paste text documents or type notes for future review. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a MS Word document). The format of the document may vary slightly from the original document. Once a document is entered, changes may be made until midnight and only by the original author. The **See List** button lists all documents in the Document Folder.

Access to the **Remove** function is controlled by Security. **Remove** will delete the document from the Document Folder.



Document Links

The **Documents Links** feature allows the user to link and view electronic documents that are related to the employee.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

In Attendance & Absence, documents are linked directly to the case. Move the cursor to the **Origin** column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **View**. The system will call up that document. Up to 800 documents may be linked to one case.

Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.

CTL1 Document Links No of Links: 1

No.	User	Date	Origin	Doc Date	Description
1	SARA	15/08/2023	HR	01/08/2023	Notes from Mgr Mtg
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

*Indicates no document was linked; x = Document may not be deleted.

Link F4

View F2

GoToBlank F9

FileName F3

Link url SF1

Go to Links:

001-100 F6

101-200 F7

201-300 SF3

301-400 SF4

401-500 SF5

501-600 SF6

601-700 SF8

701-800 SF9

SF7 Remove Link

TMB Audit Report

The TMB Audit Report provides several options to sort and generate audit reports related to entered data.

SL42 Select one option

F1 Sort by Date

F2 Sort by Fields

F3 Sort by User

Single click on option or press Function key

Exit F12

Time 11:54

PKD-Company 002

Audit

Actions on or after 15 Aug 23

Name: ABRAHAMS, PETER

ID: 125

Status: P_Fulltime

Department: 56883, Fairmont PS - Teacher

Position: TEACHER

D.O.E.: 01 Jan 03

Key: 25

Date	Time	User	Action	Field	Was-Comment1	Now-Comment2
15 Aug 23	11:50	SARA	Record access			
15 Aug 23	11:51	SARA	New folder	Doc Folders		first doc folder
15 Aug 23	11:53	SARA	New folder	Doc Folders		first doc folder

User Notes & Email

The User Notes & Email panel provides three features:

- A Note area to enter text, which will globally pop-up in any module opened for the specific employee. The system will auto-fill the original user name and date entered, along with user name and date of most recent edit. A date field is also provided to automatically remove the note if time sensitive.
- **F2 Open mailto to send email to this employee** wherein an email will open applying the employee email address from Personal Data. If no email address exists in Personal Data for the employee, a completely blank email will open. Proceed by entering Subject and the email text.
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program's sent folder.

CTL9 User Notes & Email

These notes will be shown to a user when they access this employee anywhere in the system. They are available to only those who have access to this panel.

a) Notes

b) Enter date if these notes are to removed automatically

Entered by

Date

Edited by

Date

Employee's Email: p.abrahams@somewhereco.ca

F2 > Send email to this employee

F3 > Send email to another user

Copy of email will be added to your Email Program's Sent folder

Security controls which users will see the note when accessing this employee or their records.

Demographics

The **Demographics** panel provides a read-only pop-up of the employee's general demographic information. The Demographics panel is available in various module records for easy reference. **Security** controls which users will have access to the Demographics pop-up on module by module basis.

CT35 Demographics	
Surname ABRAHAMS	Department Fairmont PS - Teacher
Given Name PETER	Employee Id. 125
Address 210 ANGELA STREET	Status Full-time
City, Prov.State LONDON, ON	Position TEACHER
Country CANADA	Hire Date 01/01/2003
Postal/Zip Code N4K 1R9	Union UNION A
Home Phone 519 432-0087	Supervisor KANE, MAE
Business Phone 519 672-9834	MANAGER
Foreign No. 226-300-7784	
Birth Date 31/10/1980	Daily Hours 8:00
Age 42	Weekly Hours 40:00
Sex Male	Work Hours 7:00 to 16:30
Marital Status Married	Miscellaneous MISC #1
Language ENGLISH	Key 25
Email p.abrahams@somewhereco.ca	

In A Nutshell

The **In a Nutshell** panel provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

Depending on the user's **Security** access, checkboxes provide access to more detailed record information. The "R" checkbox opens the actual record and the "C" checkbox opens the General Comments related to the record. In the case of Incident Reporting, Disability Management, Work Accommodation we can see the most recent five records. Attendance Management will show the most recent twenty-five records, as well as an indicator and date if the employee is in an Attendance Case Management Program. The date of the last Health Centre visit is provided from the Chart module.

CTLA Employee Records in a Nutshell

Click check box under *R to access actual record
Click check box under *C to view general comments

Incident Reporting Last 5 recorded incidents showing (excludes hazards)

Inc. Date	Class	Expect Rtw	Rtw Date	ModDuty Dt	Department	Injury	Status	Days	a)
13/03/2023	Reo				56883	RT KNEE ABRASION	Per		<input type="checkbox"/>
01/03/2023	LT	06/03/2023	28/06/2023	29/06/2023	56883	RT KNEE ABRASION	App	65.00	<input type="checkbox"/>

Disability Management Last 5 recorded claims showing

First Day Off	Type	Expect Rtw	Rtw Date	ModDuty&Dt	Department	Description	Days	b)
16/08/2022	Std	26/08/2022	02/12/2022	Yes 02/12/2022	884403	LT ANKLE SPRAIN 23124	78.00	<input type="checkbox"/>
22/04/2019	Std	04/11/2019	04/11/2019	Yes 01/10/2019	ADMIN	low back strain	140.00	<input type="checkbox"/>

Work Accommodation Last 5 recorded programs showing

Start Date	Occ?	Est. Stop	Est. Term	Completion	Act. Term	Department	Result	d)
12/04/2021		07/05/2021	4 Weeks	07/05/2021	4 Weeks	ADMIN	RTW FULL DUTIES	<input type="checkbox"/>
20/01/2020	Yes	14/02/2020	4 Weeks	14/02/2020	4 Weeks	ADMIN	RTW FULL DUTIES	<input type="checkbox"/>

KJ Attendance Last 25 time records showing

Date	Day	Department	Type	Hours	Cont
01/08/2023	Tue	56883	Sick with pay	8:00	
12/09/2022	Mon	884403	Substitute	8:00	
24/08/2022	Wed	884403	Test 100	8:00	C
23/08/2022	Tue	884403	Test 100	8:00	C

f) Date of Last Health Center Visit 06/03/2023 ☐

g) Access Personal Data record ☐

End Date of Last Case 09/04/2021

Time Markers

The **Time Markers** panel provides the user with the ability of track time related to various aspects of an incident. The **Wait Time** fields capture the number of days passed waiting for requested information of documents. The calculated days do not include weekends. The **Time Log** fields capture the number of hours spent on noteworthy activities and meeting related to the incident. The **System Time** is time spent in this record as recorded by the system. **Descriptions** may be manually typed or selected from a table. An export is available on the **Cases** dropdown on the main menu of Attendance Management.

CTM5 Time Markers

a) Wait Time

Staff	F2	From Date	To Date	Wait Days	Description	F3
1	SARA	08/08/2023	15/08/2023	6.00	Response to letter	
2						
3						
4						
5						
6						

Total Days 6.00

b) Time Log

Staff	F4	Date	Hours Spent	Description	F6
1	SARA	22/06/2023	45	Initial Record Entry	
2					
3					
4					
5					
6					

Total Hours 45

d) System Time

Date	Time Spent	User
22/06/2023	13:20	0:01 SARA
22/06/2023	13:20	0:01 SARA
22/06/2023	13:11	0:02 SARA
22/06/2023	13:11	0:01 SARA
22/06/2023	13:10	0:01 SARA
22/06/2023	10:05	0:06 SARA
21/06/2023	10:47	0:01 SARA

Total Hours 4:06

Wait Time: days passed waiting for pertinent information... Wait Days: calculated by the system, does not include weekends... Time Log: hours spent on noteworthy activities... System Time: time spent in this record as recorded by system... Descriptions may be typed or selected from a table... Please note that the same table is used by all modules... To remove a line: Clear all fields except staff. Next time, line will be removed... An export is available on the menu.

Calendar

Clicking on **Calendar** within a Case provides the user with access to the employees calendar of time entries. Refer to pages 16 through 19 for details regarding this panel.

CR02 Calendar

Go to: SF4 < >

August 2023

a) Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 SICK 8:00	2 SICK 8:00 C	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Use Arrow Keys to move cursor around calendar

Hours Per Day 08:00

Calendar Legend:
 C = Time continued
 Y = Multiple time entries
 A = Comments entered for day
 S = Substitute

F4 Repeat last time entry recorded F8 Comments for day
 F9 View all time for one day F7 Was a substitute for

Select F6
 To select time code, move cursor to time code and select bottom.

F2] Time Codes

1 Sick with pay	1:00
2 Sick pay cover	1:15
3 Sick pay Chronic	1:30
4 Sick no pay	1:45
5 Sick no pay covered	2:00
6 Sick no pay overtime	2:15
7 Vacation	2:30
8 Vacation covered	2:45
9 Vacation overtime	3:00
10 Training/Education	3:15
11 Stat Holiday	3:30
12 Birthday	3:45
13 Lieu Day	4:00
14 Company Business	4:15
15 Book off with Permission	4:30
16 Book off no Permission	4:45
17 Union Business	5:00
18 Lateness paid	5:15
19 Lateness no pay	5:30
20 Bereavement	5:45
21 Medical Appointment	6:00
22 Jury Duty	6:15
23 Maternity/Paternity	6:30
24 Leave of Absence	6:45

F3] Time

[Ctrl Enter] Go to another panel.
 [Ctrl x] Go to field x.

<<Panel CtrlQ Panel>> CtrlW Next Person Esc Home F11 Menu F12

Calendar Comments

Clicking on **Calendar Comments** within a Case provides the user with access to the individual comments previously entered that related to an employees absences. Refer to pages 20 and 21 for details regarding this panel.

01 Calendar
 02 Calendar Comments
 03 Document Folder
 04 Document Links

CR34 Calendar Comment:

Date

Comments

18/04/2022
 half day training
 half day sick

01/08/2023
 Peter called into Absence Line to report he was ill today and would be seeing his Family Dr - he will call into the HC following that visit

15/08/2023

< < > F5 Print

Review Dates Worksheet

The **Review Dates Worksheet** provides immediate access to the currently signed in user's review dates in this specific module.

The view from the module **Menu** panel are your review dates for all employees from this module which are overdue for up to three months prior. Alternative views are listed on the right side of the panel along with fields to enter specific date parameters or specific due dates.

The **Done** check box will auto-fill a review date, stamping it with today's date and the User ID of the user currently logged into the system.

The **View** check box will open a subsequent panel which allows the user to enter text related to the **Action** taken related to the activity, and enter a **Completion Date** for the Action. Do NOT click on the Done check box here, the system will auto-fill.

The **Get Record** check box will open the record associated with the review for the user to add, review or revise information on the panels specific to the record.

The **Reassign** check box, in conjunction with the **Assign F9** or the **Reassign All F14**, will allow the user to assign the review dates to another user one-by-one or on masse.

See the **D6Z Review Dates** report for an alternative method to access review dates for one or more users. The D6Z Review Date report may be accessed from the sidebar or from the **Management/Employee Reports** dropdown menu.

	Date	Overdue	Name	Activity	a) Done	View	Record	Assign
1	21/07/2023	<input checked="" type="checkbox"/>	MONTMORE, DONALD	TWO MONTH REVIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	31/07/2023	<input checked="" type="checkbox"/>	ANDREWS, LONI	ONE MONTH REVIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Due:

Today F1

This week F2

Next week F3

2 weeks F4

3 weeks F5

Overdue F8

b) Due between

and

Go F6

d) Due on

Go F7

ReAssign F9

Assign All SF4

Exit F12

Reports Available In Attendance & Absence Management

Do Time

Open Employee Time/Calendar
 QR33 Current Month Calendar
 R34 Calendar Comments
 R2A Document Folder
 TMB Audit
 R24 Employee History
 R05 Calendar – Selected Employee
 R29 Calendar – By Dept/Group
 R43 Time Entry Audit
 R44 Time Entry Audit by Employee
 R62 Time entry Anomalies
 Export Txt File

Employee Analysis

R12 Department Summary
 R15 Analysis
 R16 Performance
 R17 Calendar of Hours
 R18 Time by Day of Week
 R22 Two Year Comparison
 R23 Time by Union
 R27 Dept/Group Details
 RAD Time Entry Summary

Employee Reports

R11 Excessive Time
 R13** Highest Absence Rate
 R19 Employees Currently Off
 R21 Summary by Employee
 R20 Absentees Approaching Limit
 R26 Employee Time Frequency
 R25 Attendance Profile
 R40 Zero Time Entries
 R41 Time Entry Register
 R90 Consecutive Time
 R91 Multiple Time

Substitutes

R46 Missing Time For Links
 R47 Time Links

Graphs

RHA Days Absent Report
 RHB Case Status
 RHC Extended Weekend Report
 RHD Employee History Report
 RHE Substitute Hours Report
 RHF Occurrences Summary

Cases

New/Open Case
 R74 Case Comments
 TM3 General Comments
 R2A Document Folder
 R7D Case Details
 TMB Audit
 Review Dated Work Sheet
 R7A List of Cases
 R7G** Export List of Cases
 R8A Progress Report
 R8T Activity Report
 R7B Review Dates
 R94** Export Cases
 TM9** Export Time Markers
 RMD Audit

Transfer

R37 Time Transfer
 R39 Transfer Days to WCB
 R14 Transfer Days to Disability Mgmt

Options

Time Code Tables
 R03 Time Code Tables
 R06 Time Sets & Corresponding Time Codes
 Case Descriptions
 R83 Case Description Tables
 Time Markers
 TM7 Time Marker Tables
 Define Union Hours
 R45 Hours per day by Union
 R3K Temporary Staff Changes
 RMD Audit

** Option to Create Export File in Addition to Report.

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