Attendance & Absence Module

User Guide – V 12.0

April 22, 2024

PARKLANE SYSTEMS

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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.

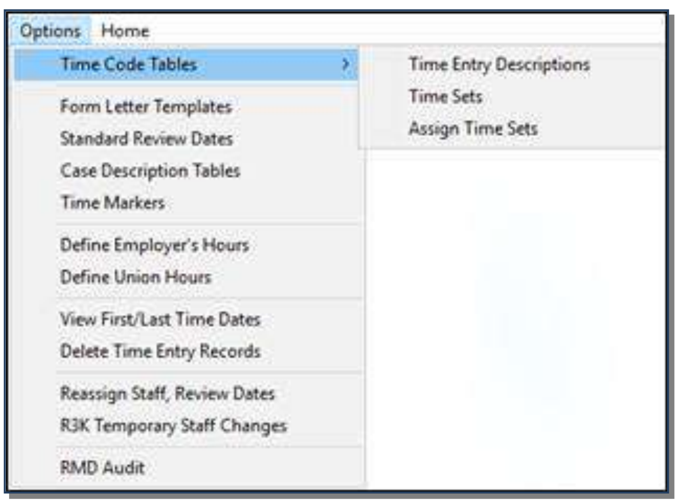
The user must define **Time Entry Descriptions** and **Time Entry Sets**.

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.

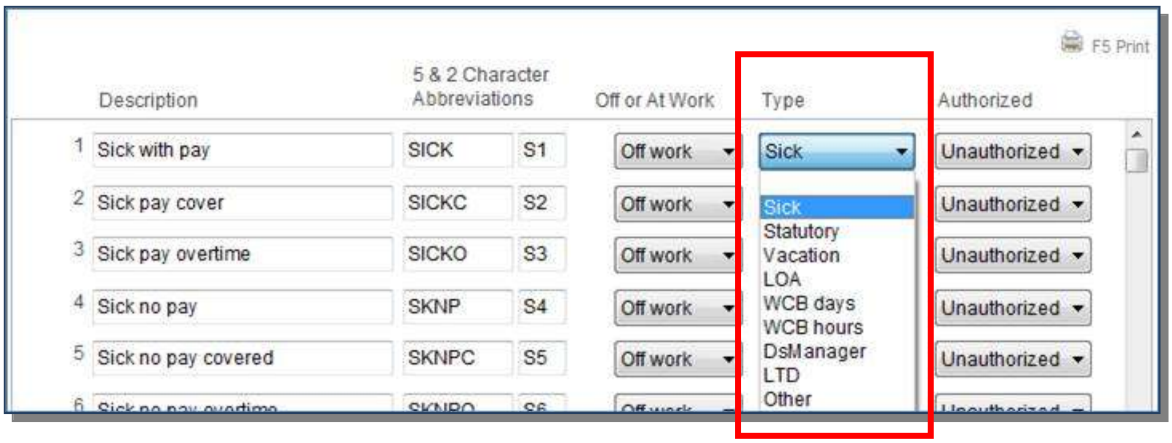
For each **Time Entry** category, you must specify the following:

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

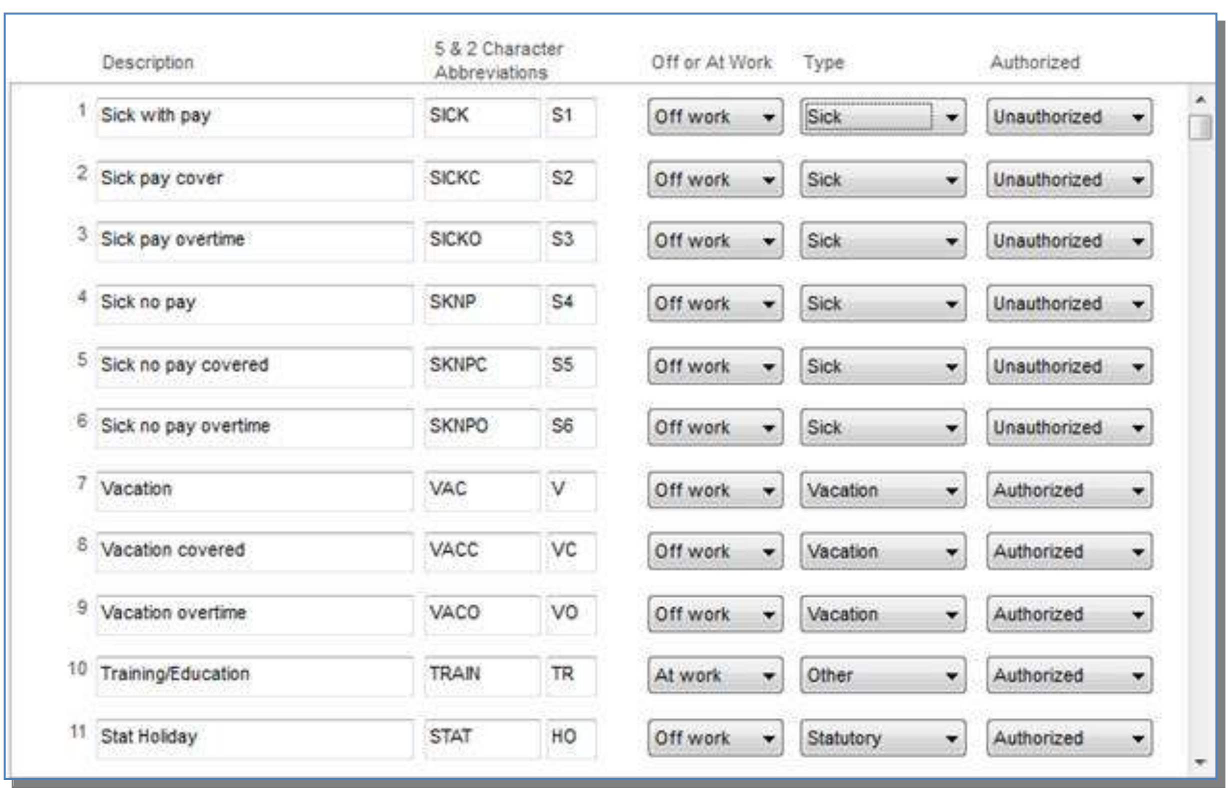
Abbreviations - Five (5) and two (2) digit abbreviations used for the Time Entry on screens and reports.

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.



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



Define Time Sets

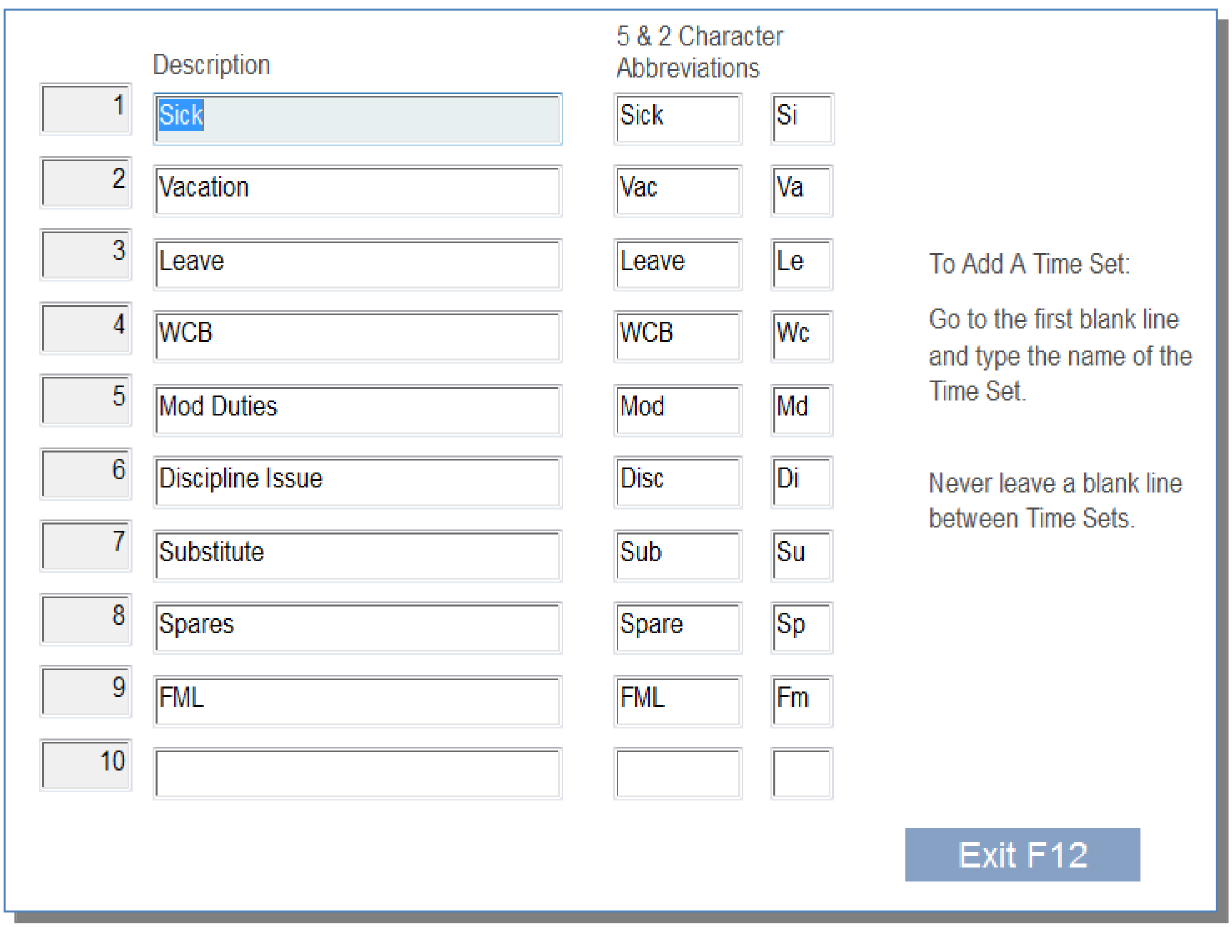
Time Sets give the ability to group time entries together and report them as one. You can have multiple time codes that refer to the same type of time entry. **Time Sets** can be setup at any time and can be changed later with no repercussions.

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.



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.

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.

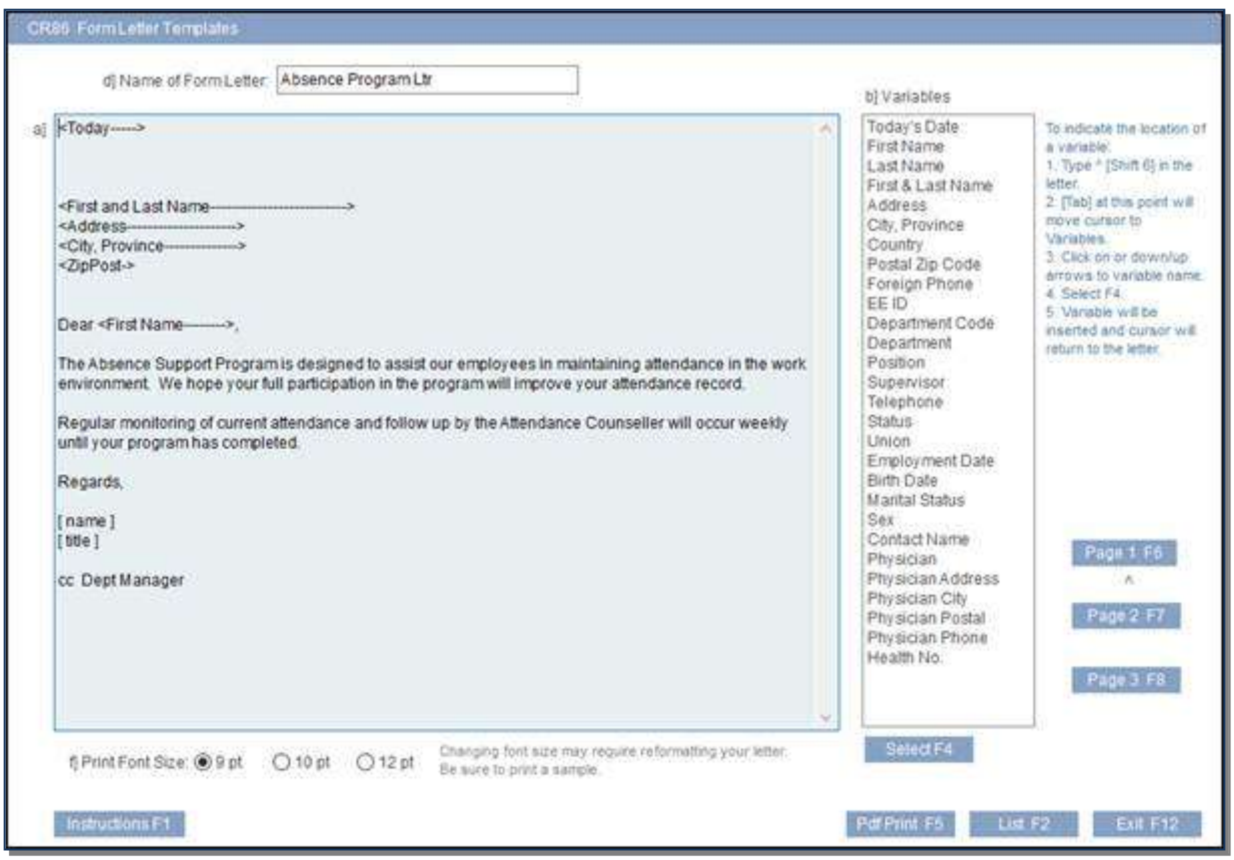
Total FTE days: Full-time employee	= 24 / 8 = 3 days
Part-time employee	= 9 / 8 = 1.1 days
Shift Worker	= 36 / 8 = 4.5 days

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.



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

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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".

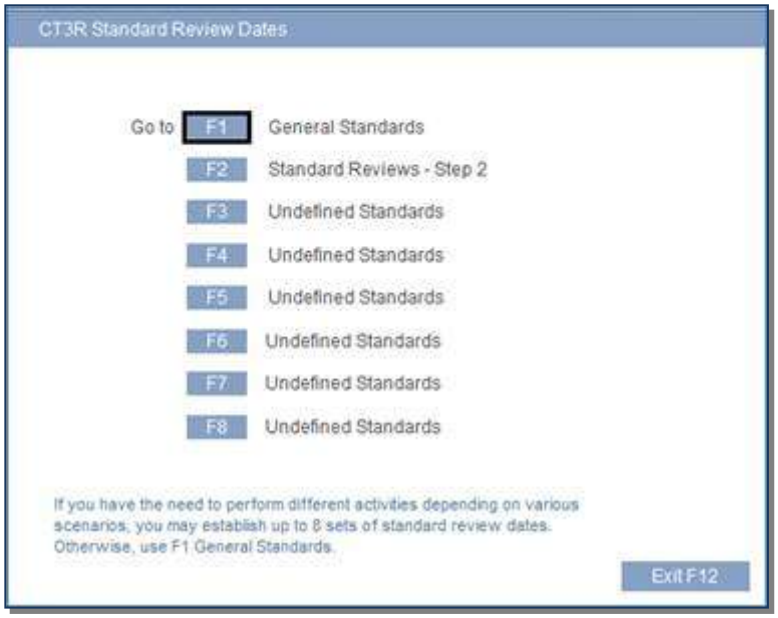
On the blank screen, provide a name or description of the form letter template. Indicate if you will require a response when the actual letter is sent.

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.



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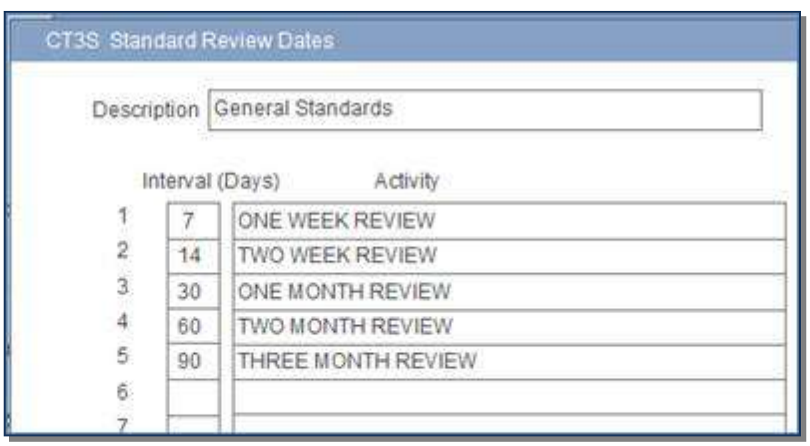
Select a set identifier and enter a **Description** name for the set. You may enter routine follow-ups and identify the interval (number of days) in relations to the start date of the case. You may enter up to 50 pre-defined activities or procedures per set. The interval days will be used to determine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

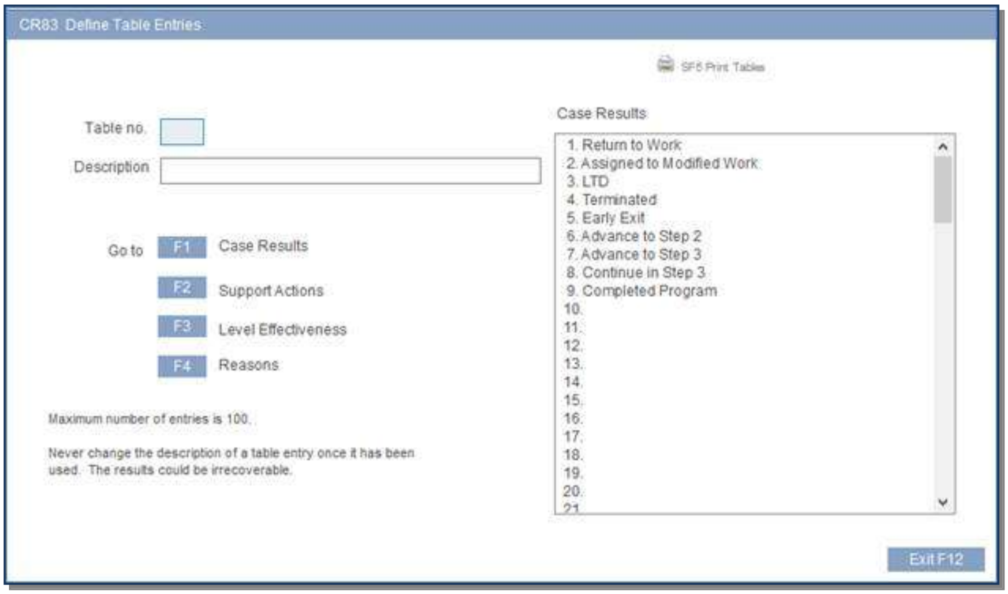


Once the Standard Review Dates are defined you may access the **Review Dates** panel of a case and click on **Standards** and the system will provide the list of sets. Once a set is selected, the system will auto-fill those standard activities and determine the target date for each.

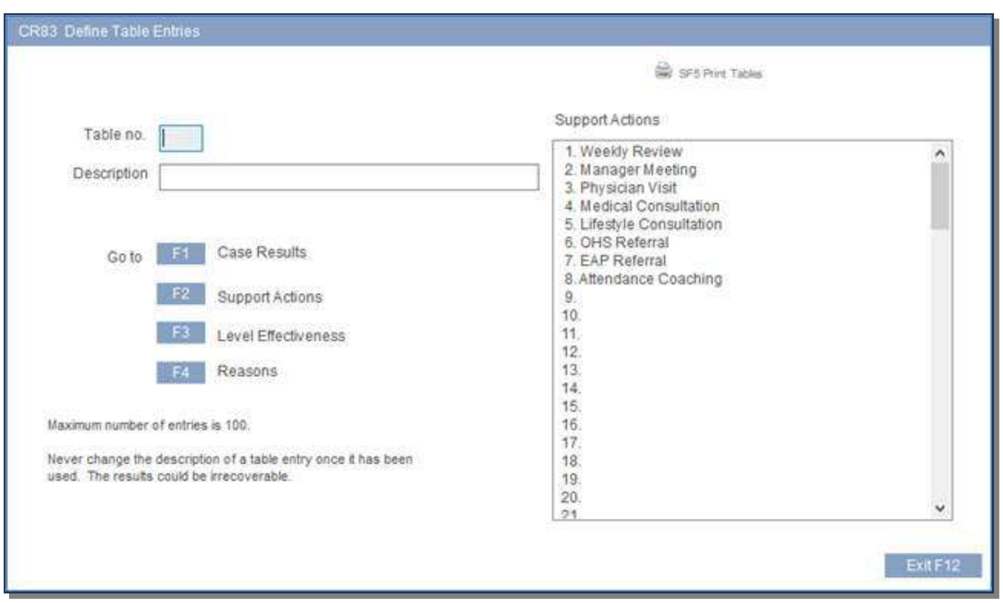
Case Description Tables

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

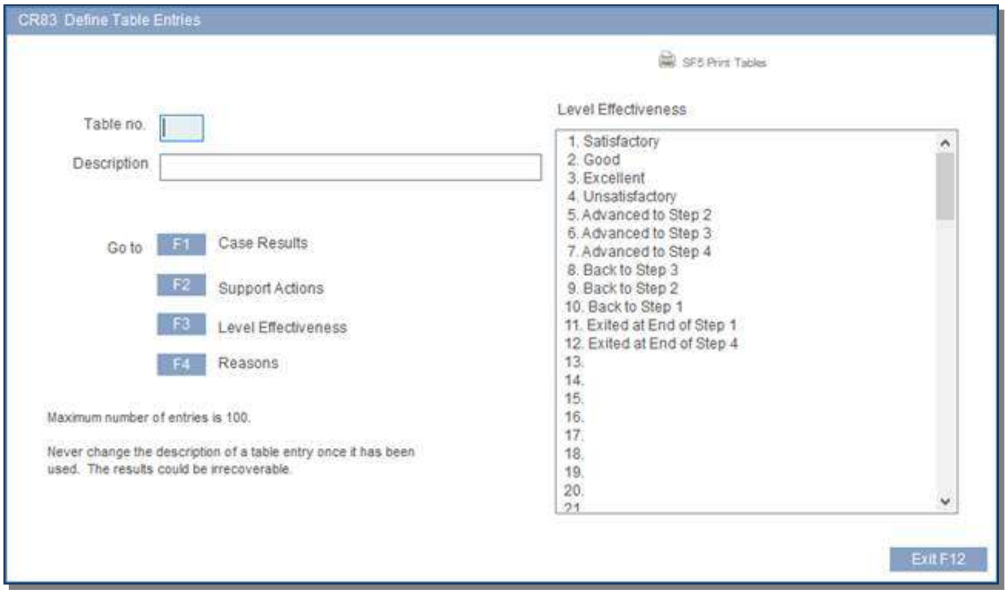
In **Case Results** define the results of the support program, e.g., Return to Work, Assigned to Modified Work, LTD, or Terminated. To add a **Case Result** click on the No. field, if not activated, enter the next blank description number and press tab. Type in the text description and press tab. The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



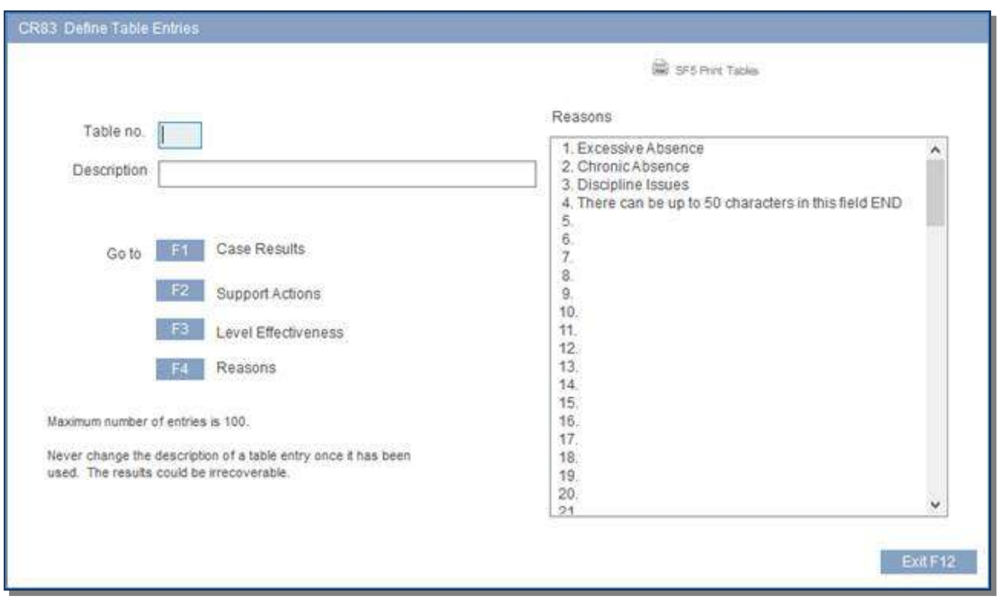
To access the **Support Actions** setup table click on **Options/Descriptions Tables** and press **Support Actions**. In **Support Actions** define the actions that are normally taken or followed during the support process. e.g. weekly meetings with manager, physician visit, etc. To add a **Support Actions** 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.



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.



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.



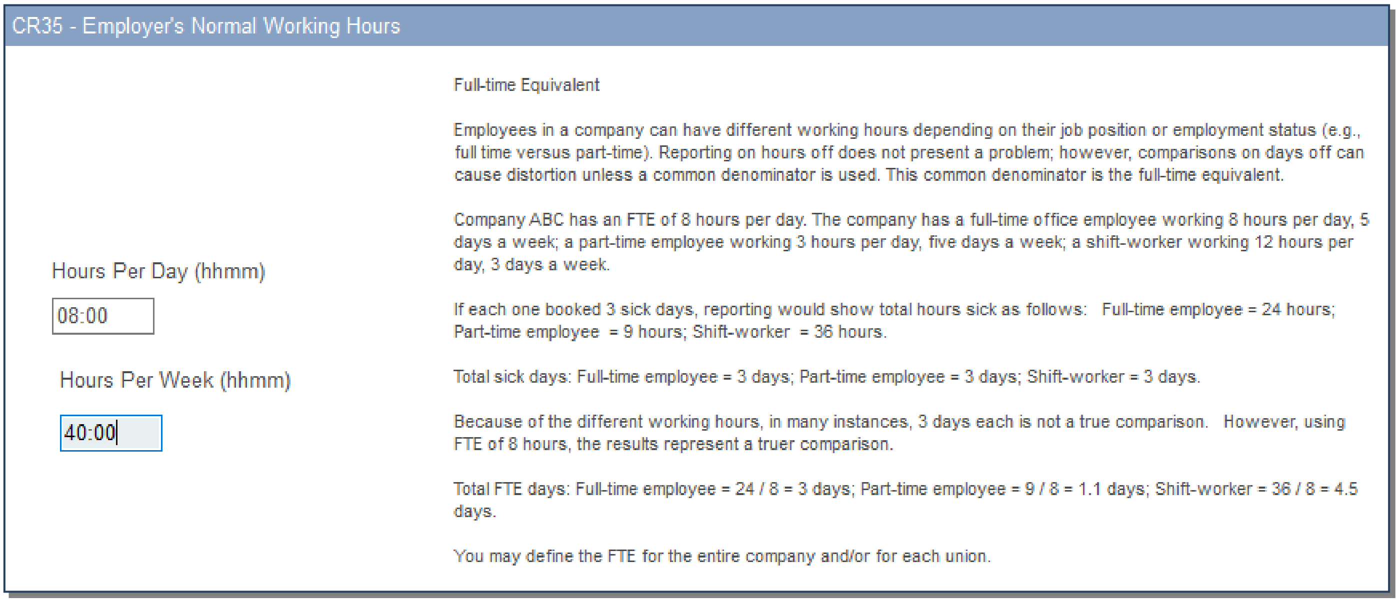
Time Markers

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.

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

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.



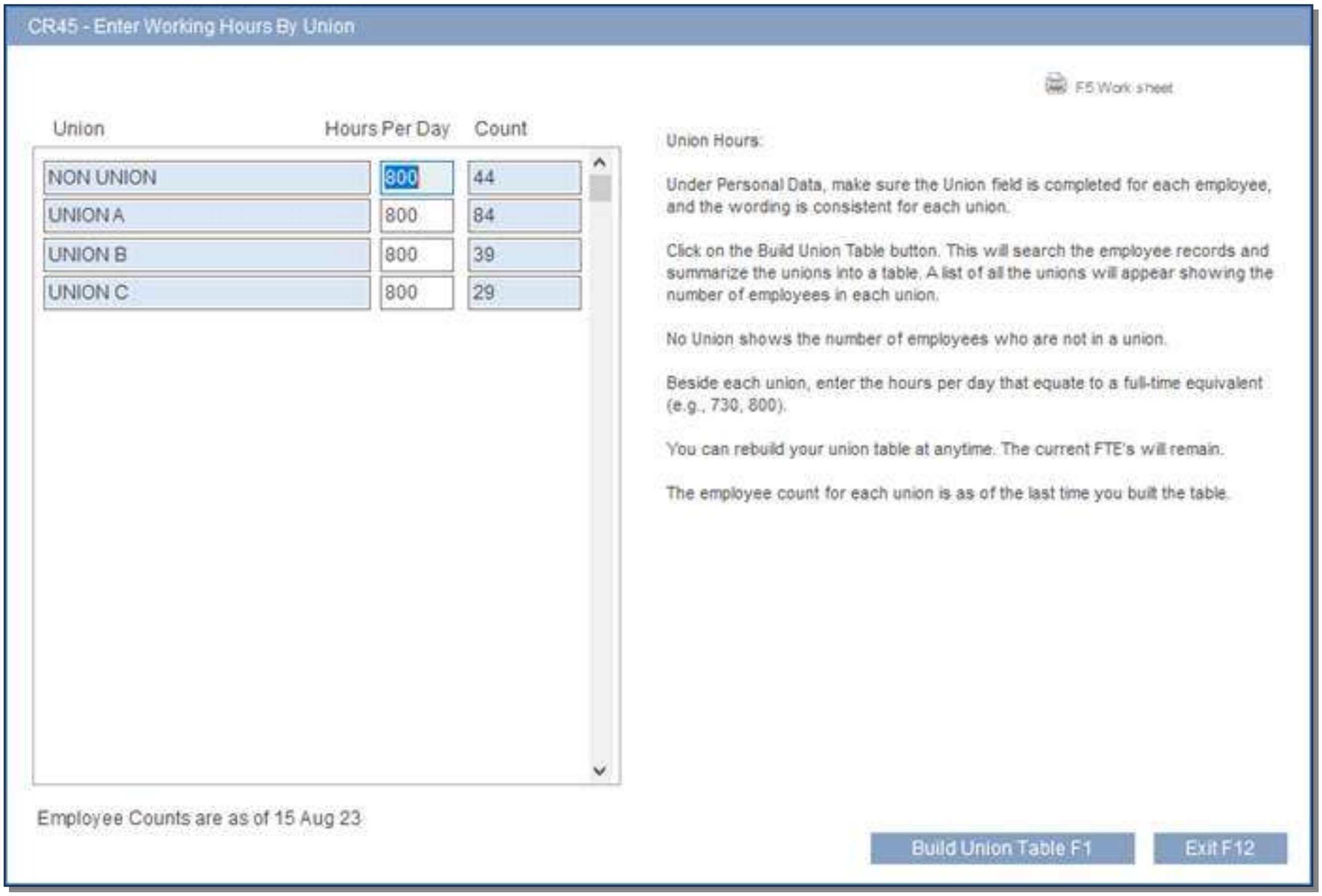
Define Union Hours

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.

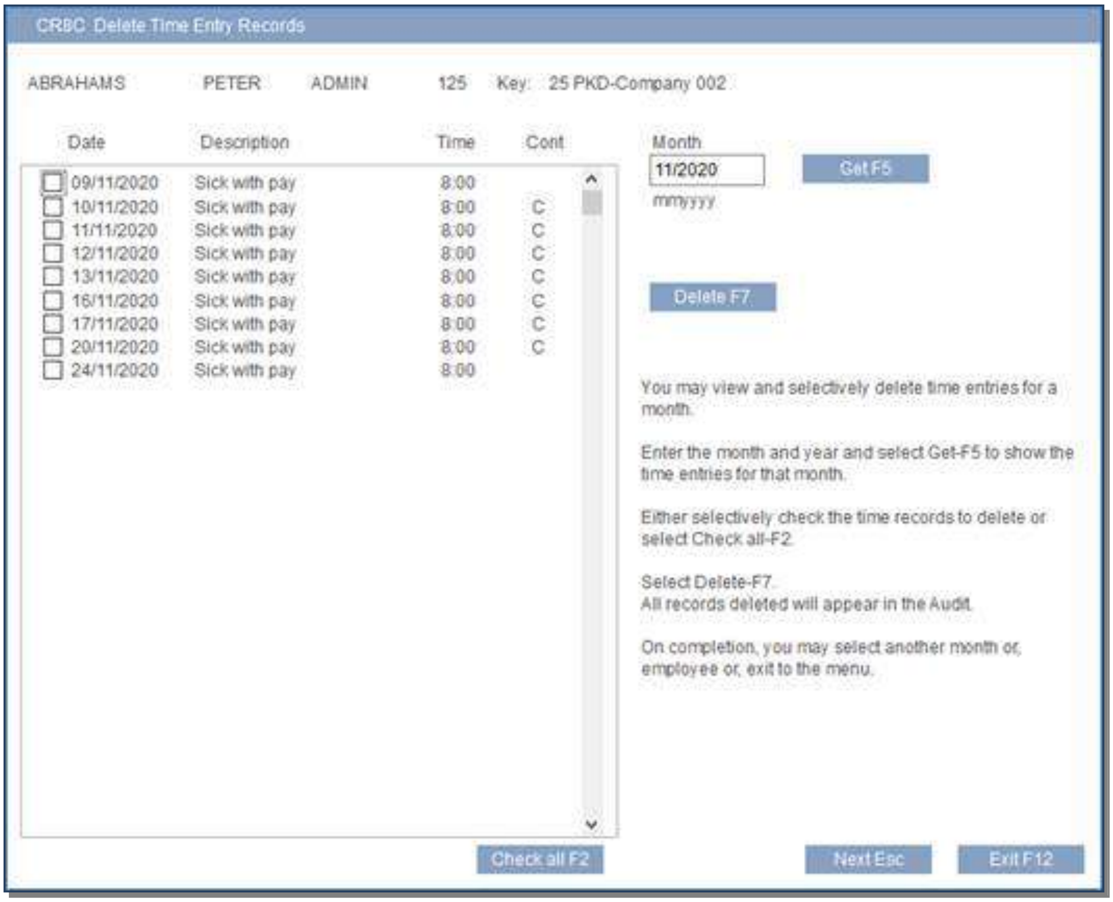


View First/Last Time Dates

Identifies dates of the time entries entered into this module.

Delete Time Entry Records

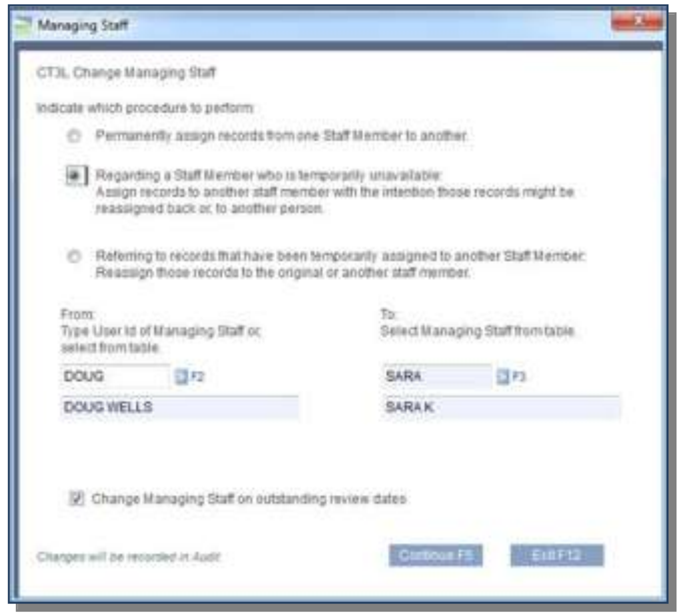
To delete multiple time entries for one employee, select **Delete Time Entry Records** under Options. Select the employee to open the deletion panel. Enter the month and year (mmyy) and select Get F5. All time entries will be displayed.



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.

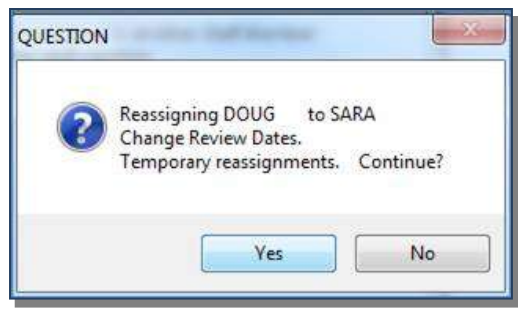
Reassign Managing Staff on Review Dates

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.

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.

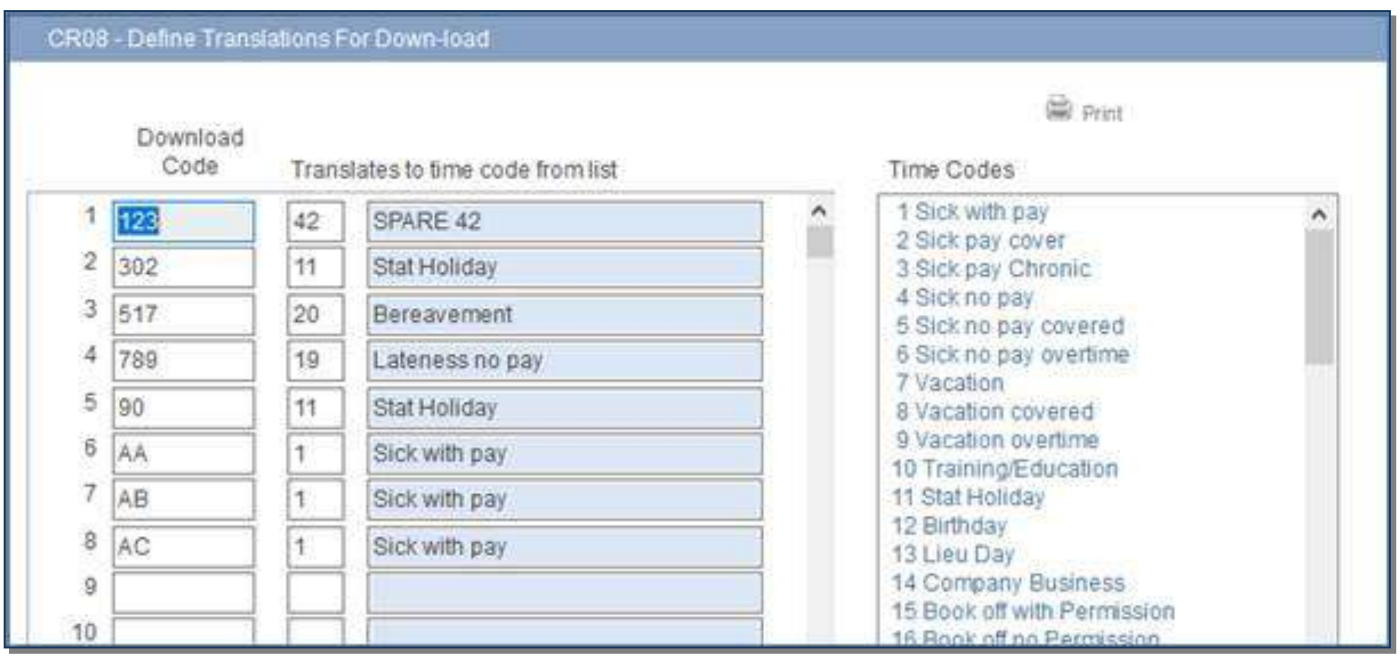
If costs are not included on the import file, your system will use the employee’s salary to calculate the cost for each time entry. Costs can be imported without having any time recorded.

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.



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Attendance Import Record

File Name: Hstime.Txt
File Format: ASCII (undelimited)
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:

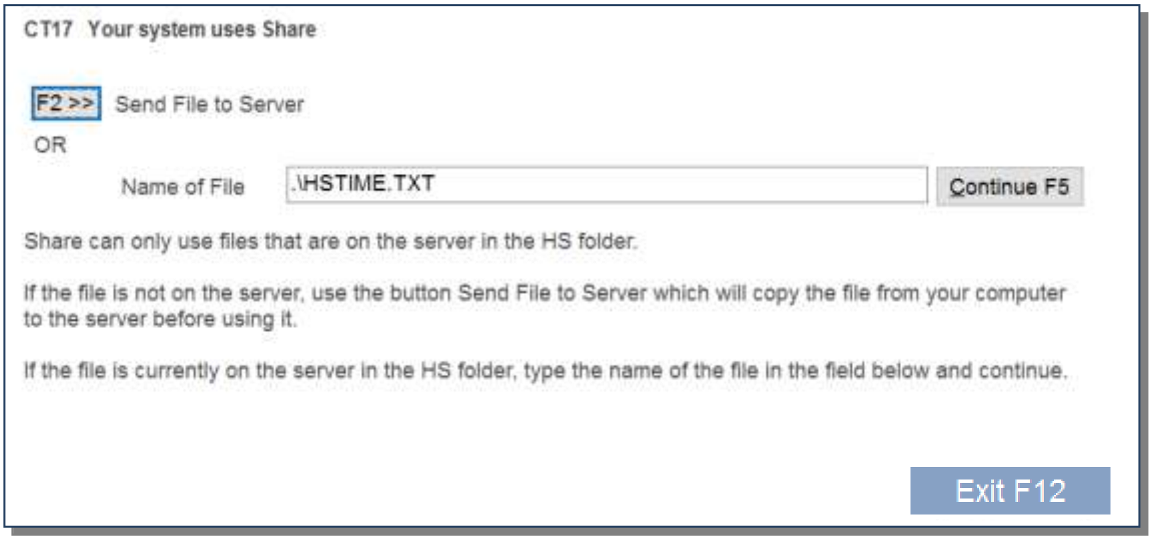
No	Description	Alpha/Numeric	Size	Comments
1	SIN/SSN or Employee ID	A	9	
2	Date of Time Entry	D	8	**Format** In Canada = ddmmyyyy In the U.S.A. = mmddyyyy
3	Type of Time Entry	A/N	10	
4	Time	N	4	Define as hours and minutes – hhmm
5	Continued	A	1	Y if time is a continuation
6	**Cost	N	6	$$$$cc decimal 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.

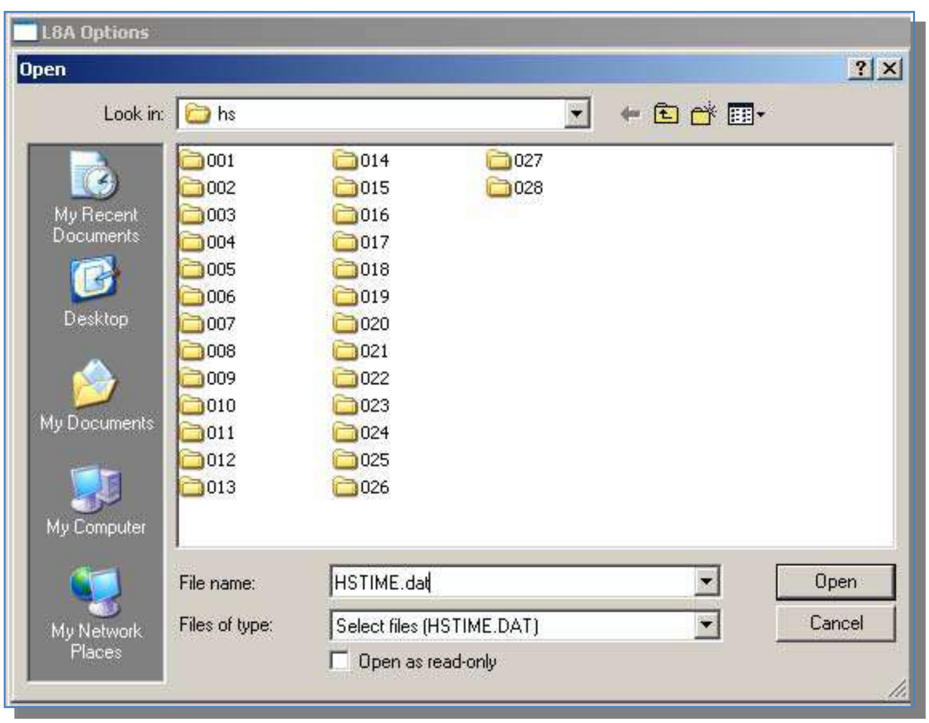
**Cost:
This is the cost of the time entry in terms of number of hours * hourly rate.
(Depending on the type of time entry, costs at reduced rates are allowed).
This field is optional and may be left blank.
If Cost is zero on the import file, the system will compute cost using the current salary on the 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.

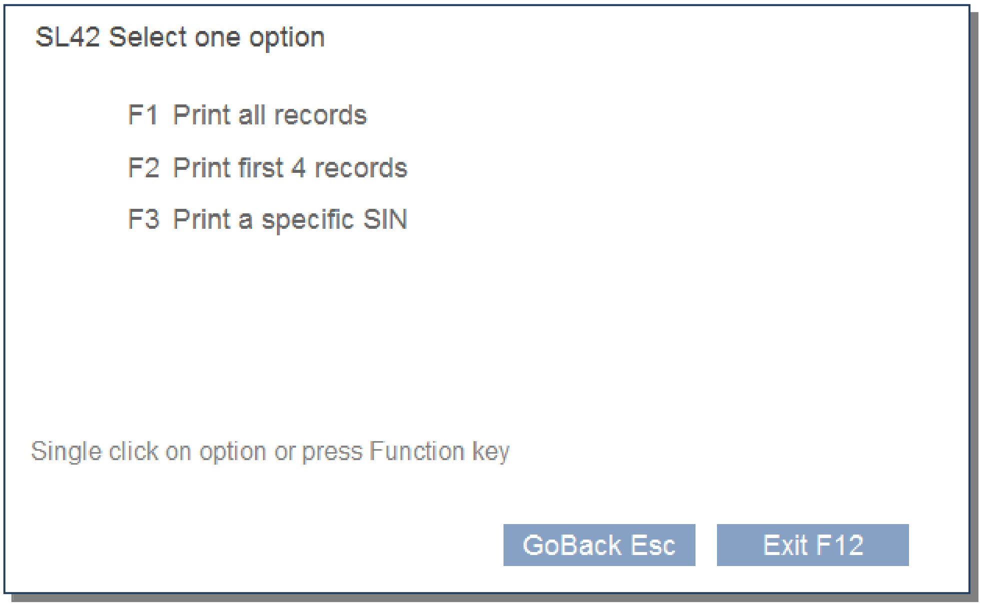
Print Time File

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.

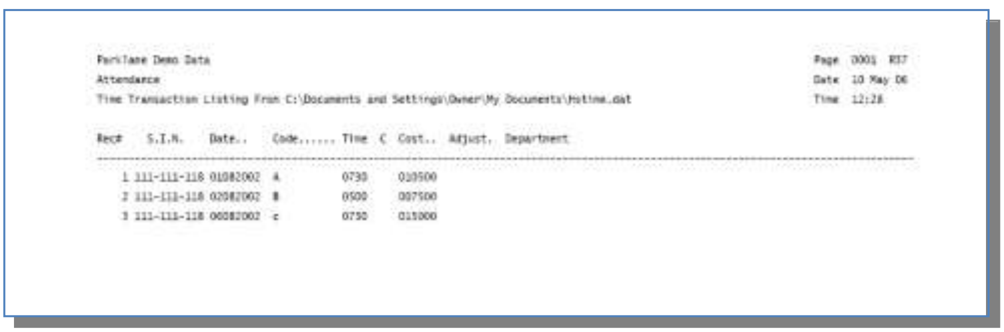




The system will ask you to select an option for printing by pressing the corresponding push button.



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

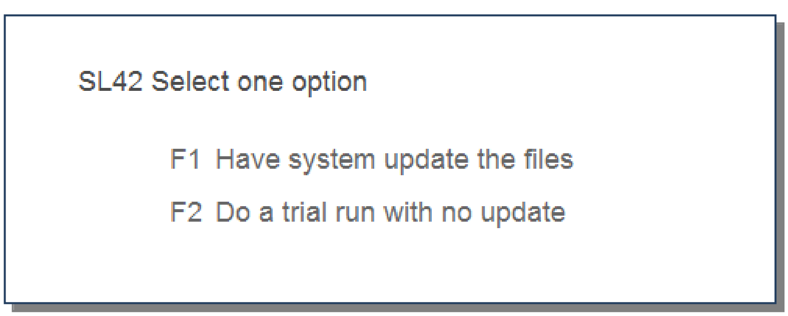


```
ParkLane Demo Data                                                       Page  0001  RI7
Attendance                                                               Date  10 May 06
Time Transaction Listing From C:\Documents and Settings\Owner\My Documents\Hotime.dat     Time  12:28

Rec#   S.I.N.      Date..    Code...... Time  C  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           0750     015000
```

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.



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

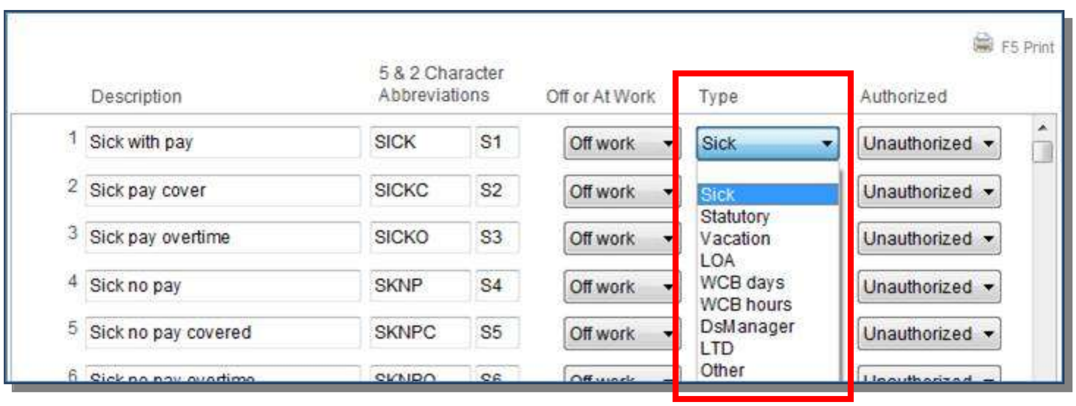
- WCB days will calculate the number of days with entries (regardless of the number of hours Absent). The total number will be transferred to the Days Lost panel in the Incident Reporting module.
- WCB hours will calculate the number of days absent by adding the total number of hours absent and dividing 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.

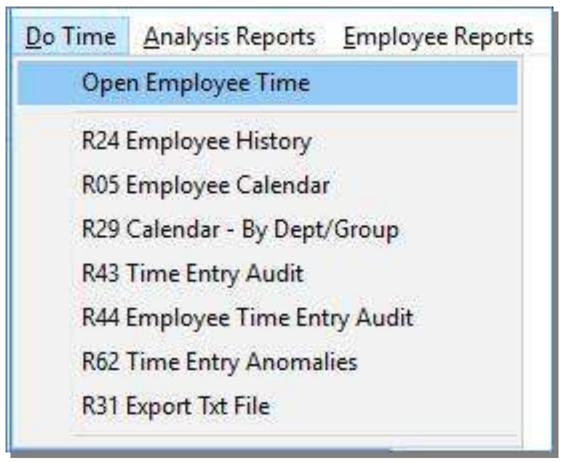


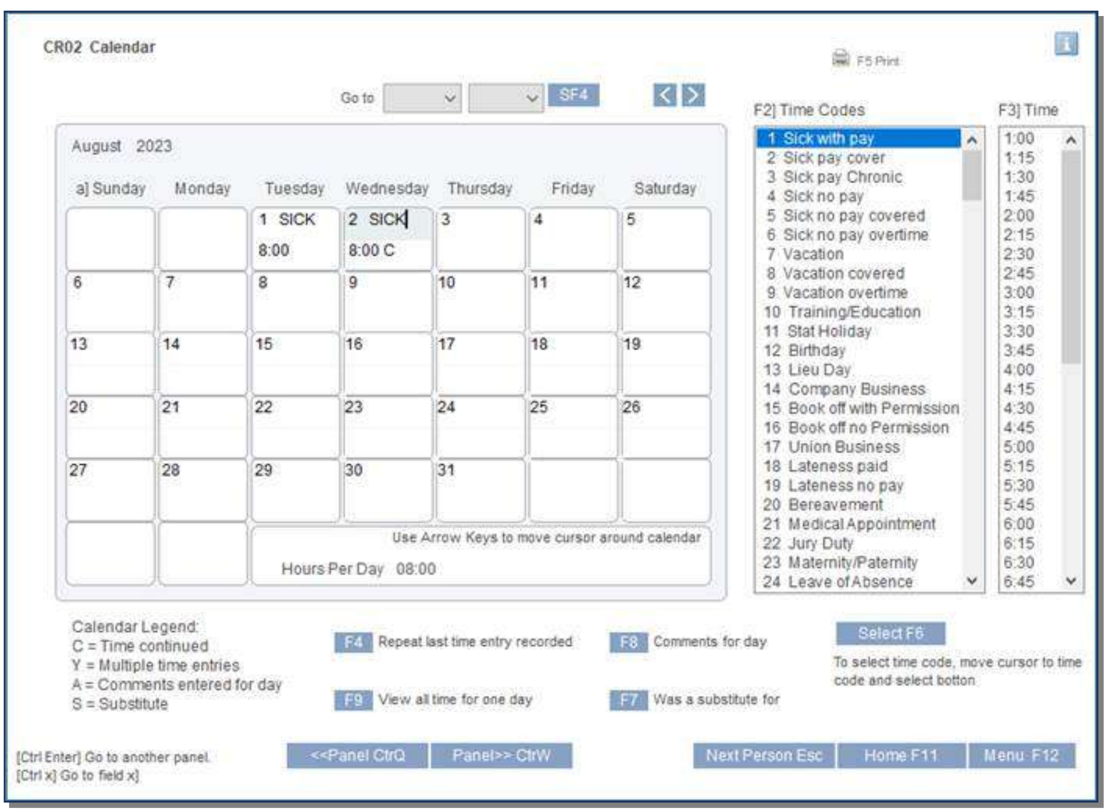
This process eliminates the requirement to enter Days Lost in the Incident Reporting and Disability Management Modules and therefore, saves valuable entry time.

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.

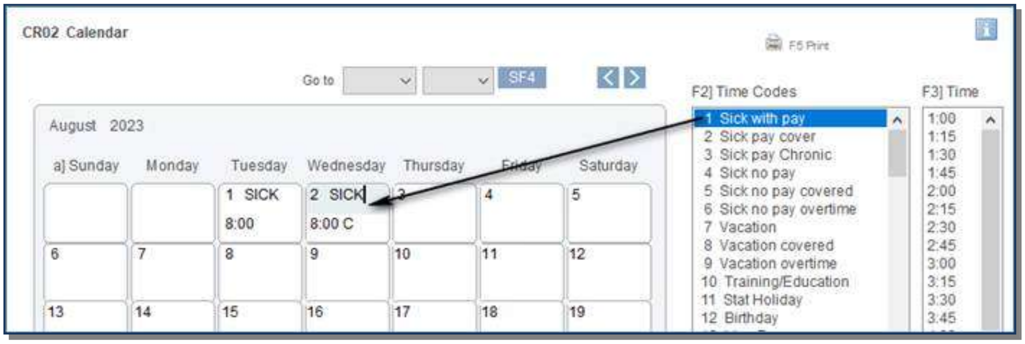




Under Time Codes, click on the required entry.

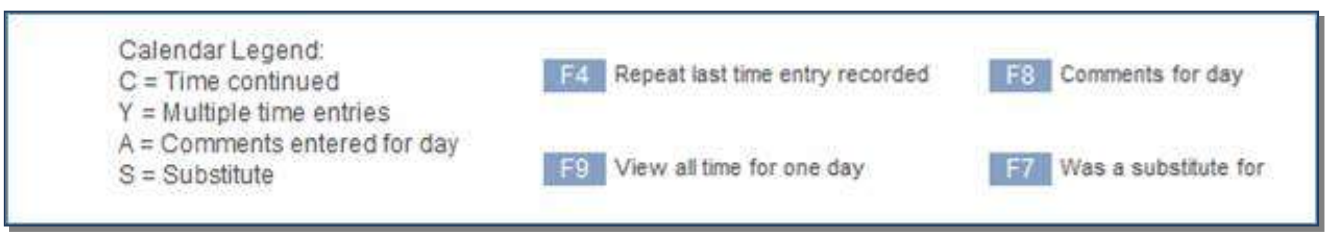
The time code will appear on the day that was selected. Your system will default to a full day and insert the hours from the **Personal Data** record.

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:

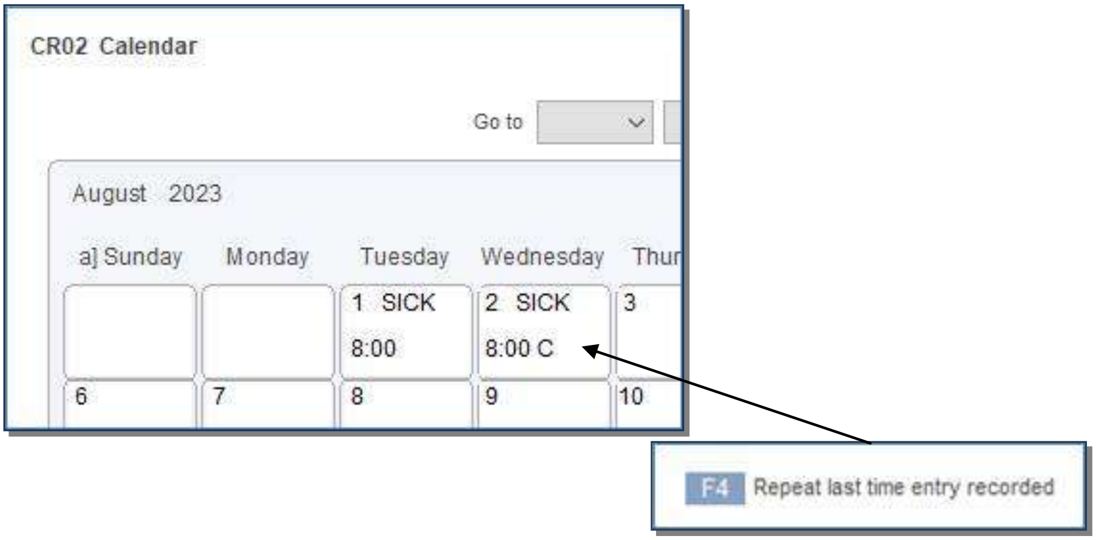
- C = The hours shown for this day are a continuation
- Y = There are multiple time entries for this day
- A = There are comments for this day
- S = The hours represent substitution for another employee



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.



Multiple Time Entries

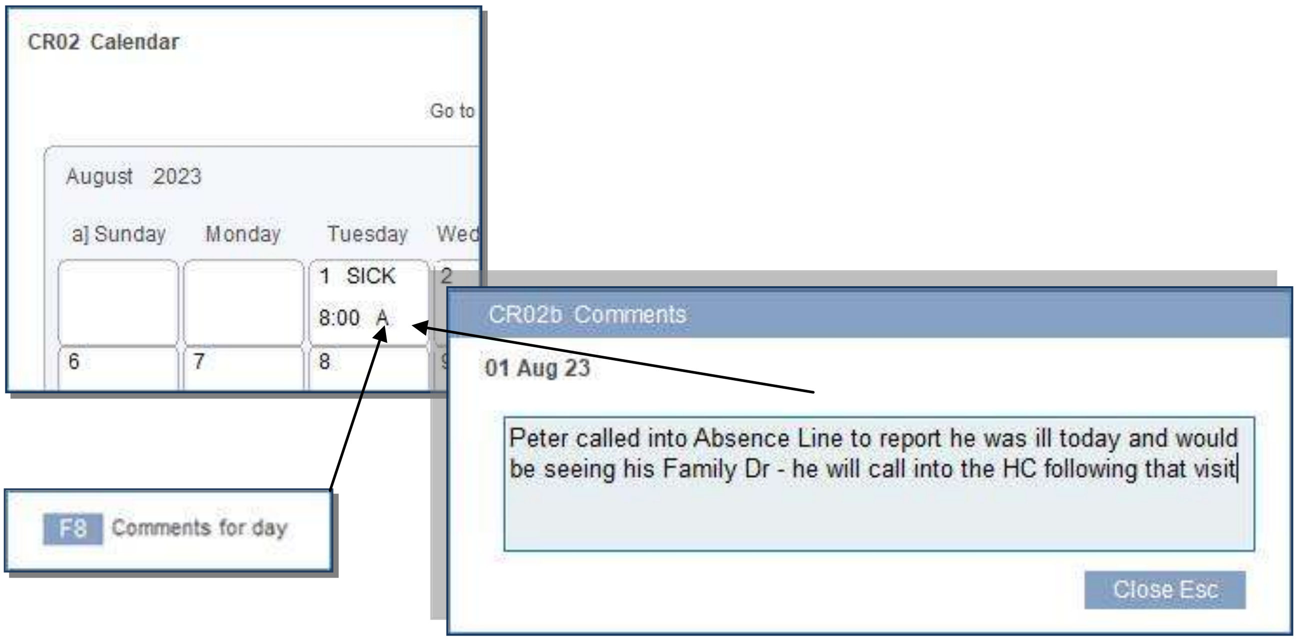
In some cases, an employee may have more than one absence issue in a day. For example, the employee may have been late for work and sick later the same day. Multiple time entries may be entered for one day.

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.

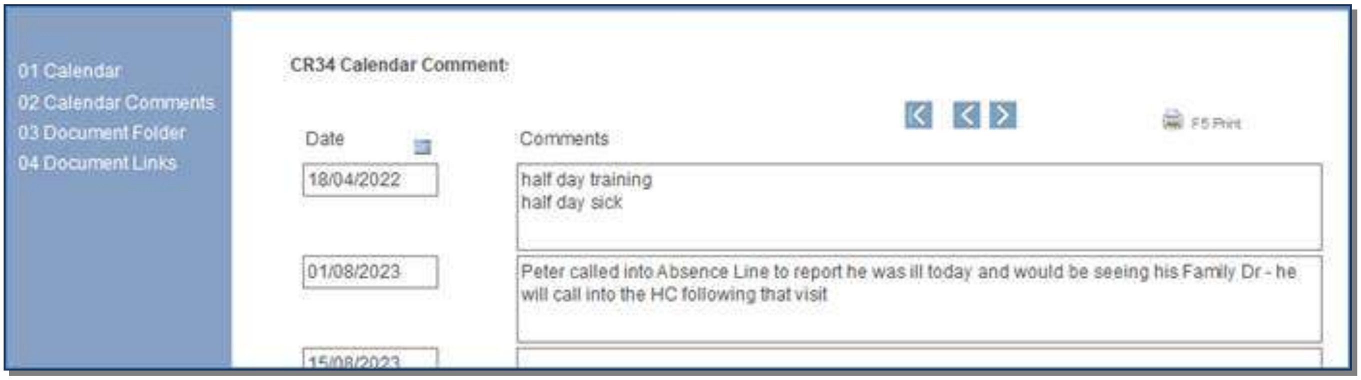
Comments Entered For Day

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**. <u>Linking is always done on the substitute's calendar, not the other way around</u>. 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.

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:

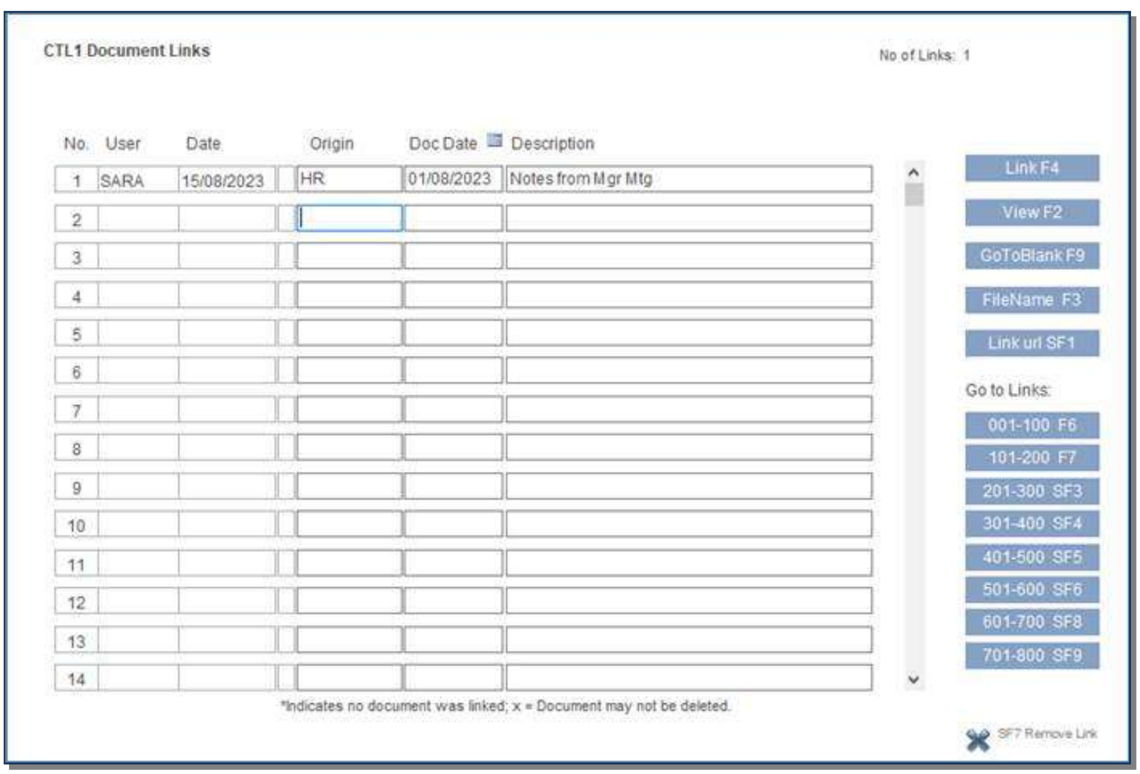
- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

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.

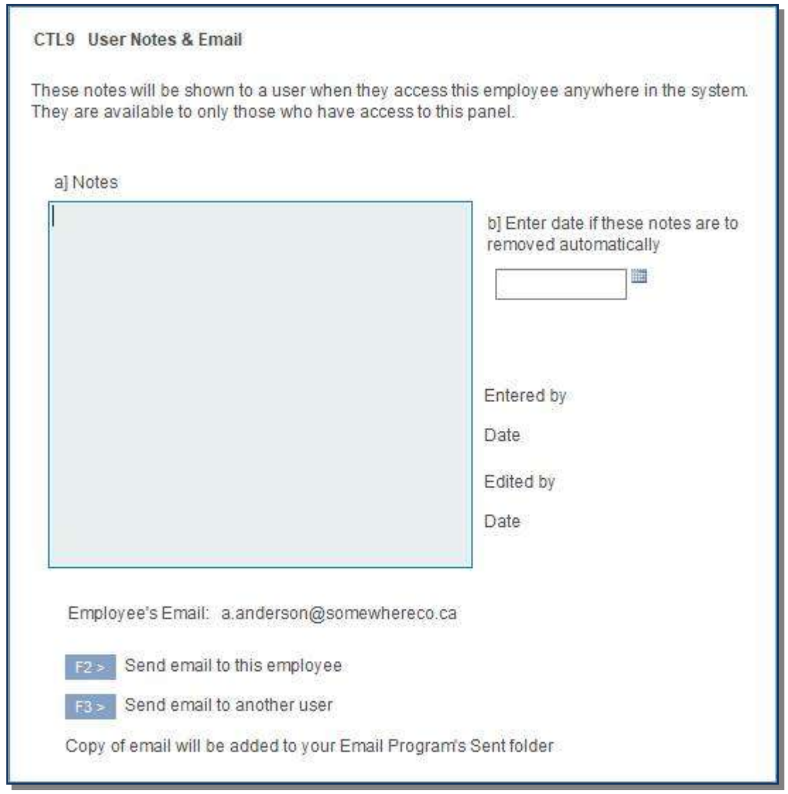
Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

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.



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.

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.

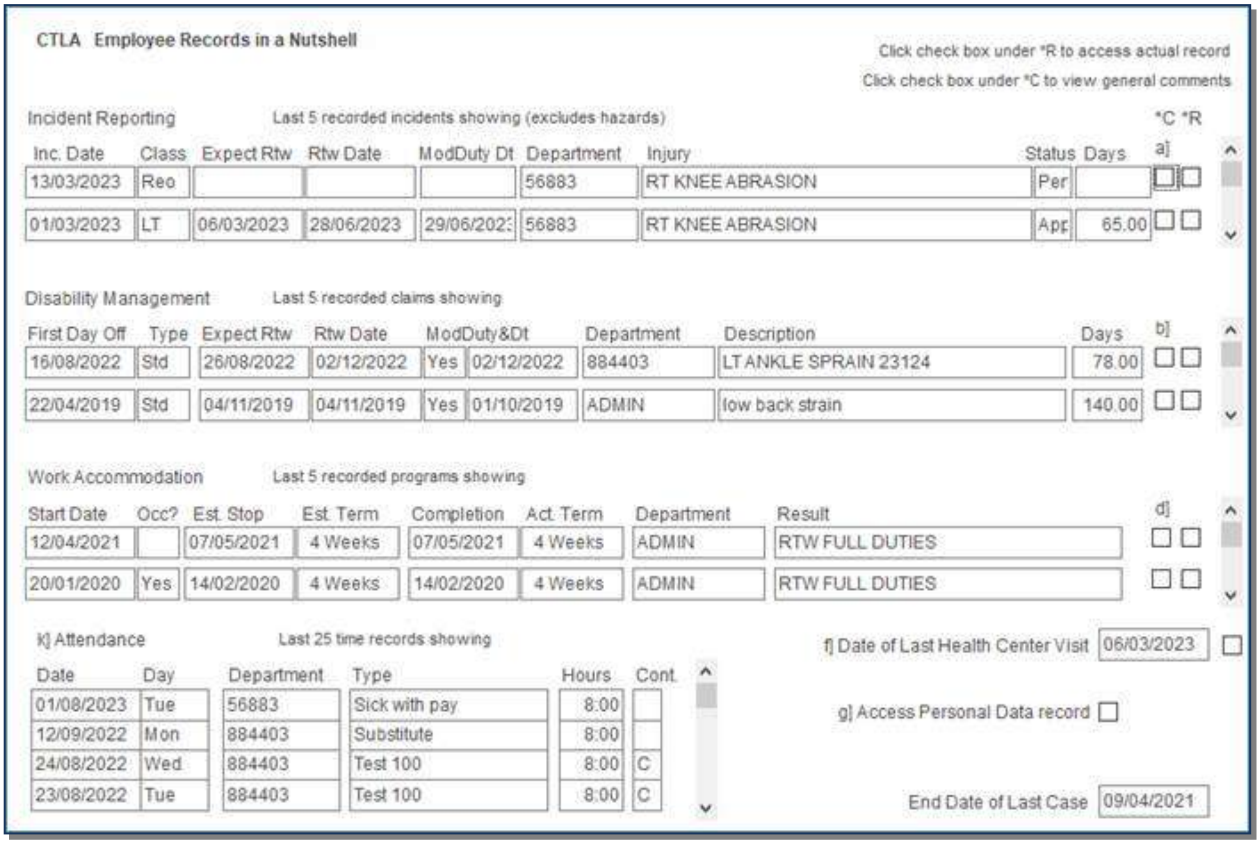
CT35 Demographics

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 MANAGER
Business Phone	519 672-9834		
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) — *C *R

Inc. Date	Class	Expect Rtw	Rtw Date	ModDuty Dt	Department	Injury	Status	Days	a]
13/03/2023	Reo				56883	RT KNEE ABRASION	Per		
01/03/2023	LT	06/03/2023	28/06/2023	29/06/202:	56883	RT KNEE ABRASION	Apr	65.00	

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	
22/04/2019	Std	04/11/2019	04/11/2019	Yes	01/10/2019	ADMIN	low back strain	140.00	

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	
20/01/2020	Yes	14/02/2020	4 Weeks	14/02/2020	4 Weeks	ADMIN	RTW FULL DUTIES	

k] 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

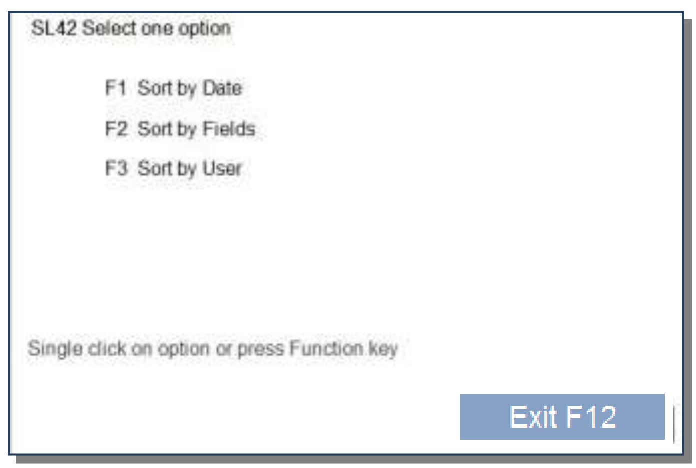
f] Date of Last Health Center Visit 06/03/2023

g] Access Personal Data record

End Date of Last Case 09/04/2021

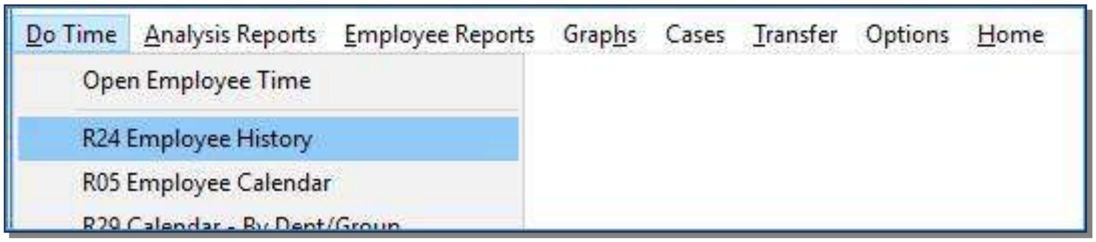
TMB Audit Report

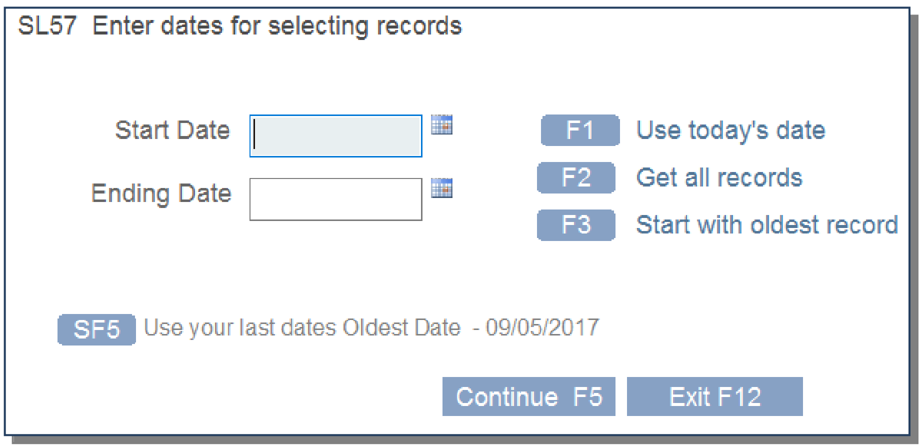
The TMB Audit Report provides several options to sort and generate audit reports related to entered data.

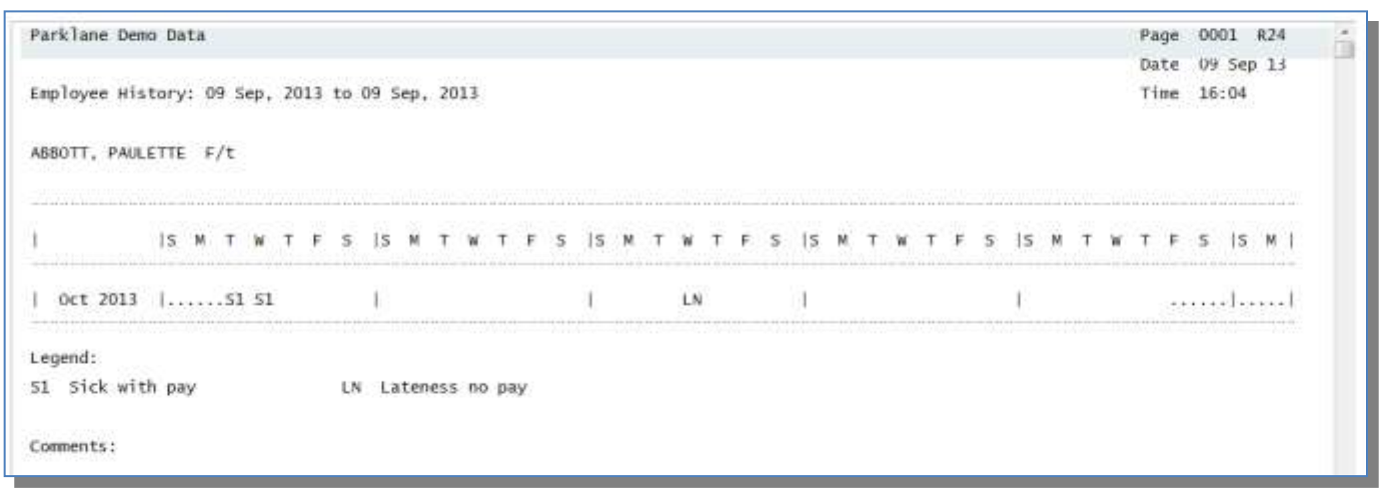


View Employee History

From the menu, click on **Do Time/R24 Employee History**. Select a date range and click **Continue-F5**. Select whether Comments should be printed. The **Print Option** box will appear. Click on the arrow and select the employee to access. The system will show the absence history for this individual for the time frame selected. The dots along the left hand side extend to the starting day of the month while the dots on the right hand side extend to the last day of the month.

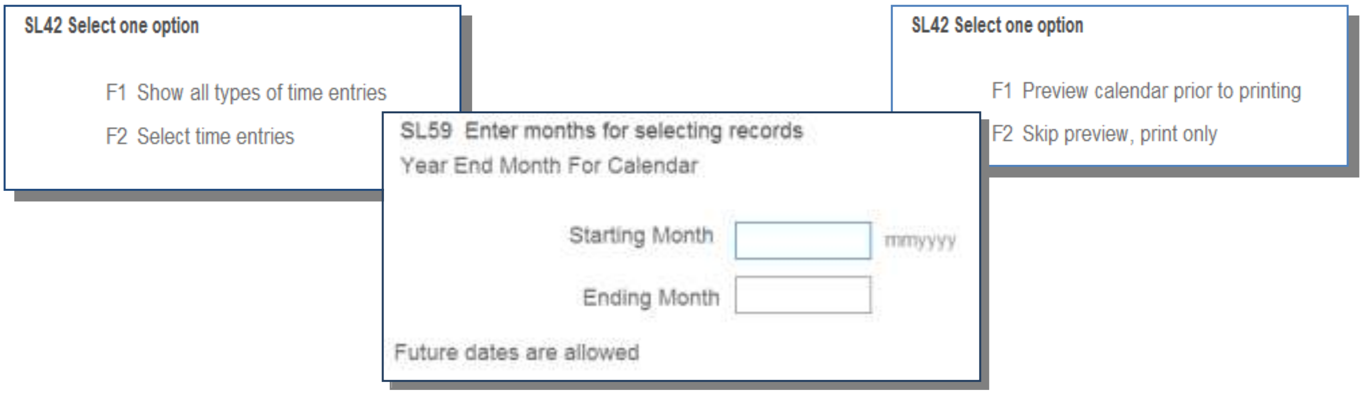


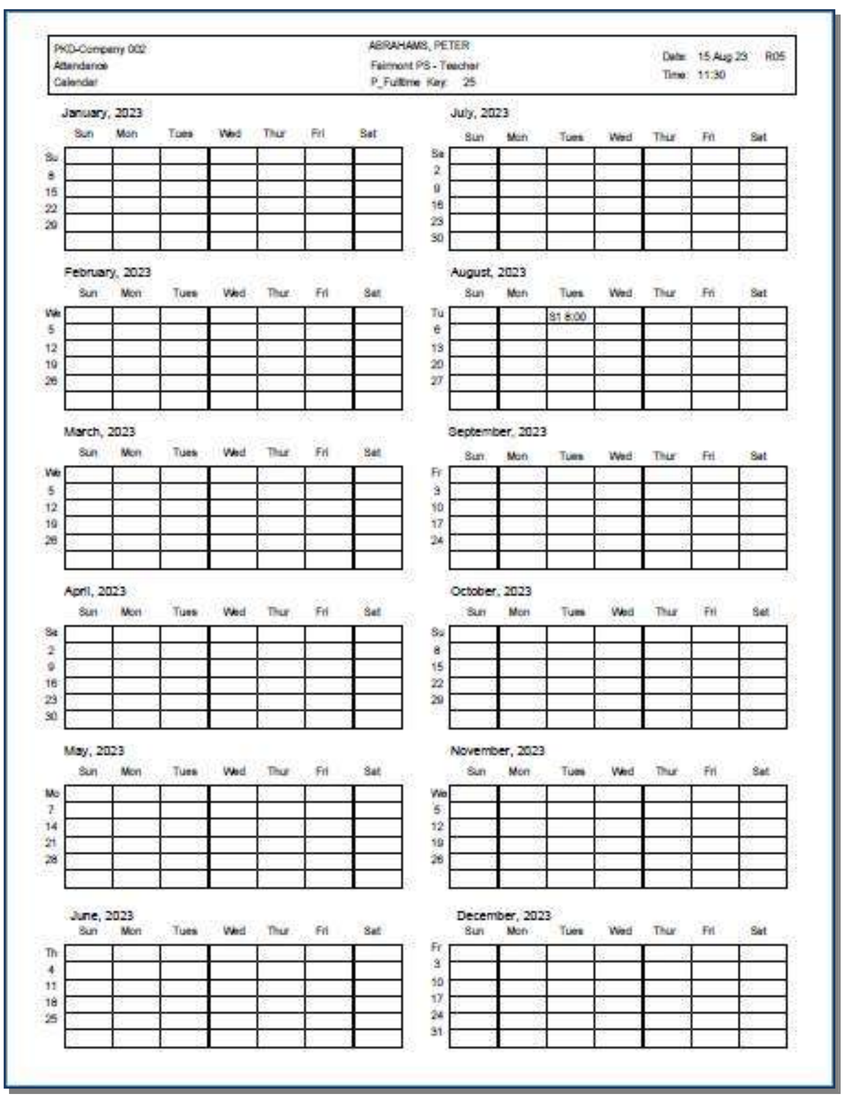




Employee Calendar

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.





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**.

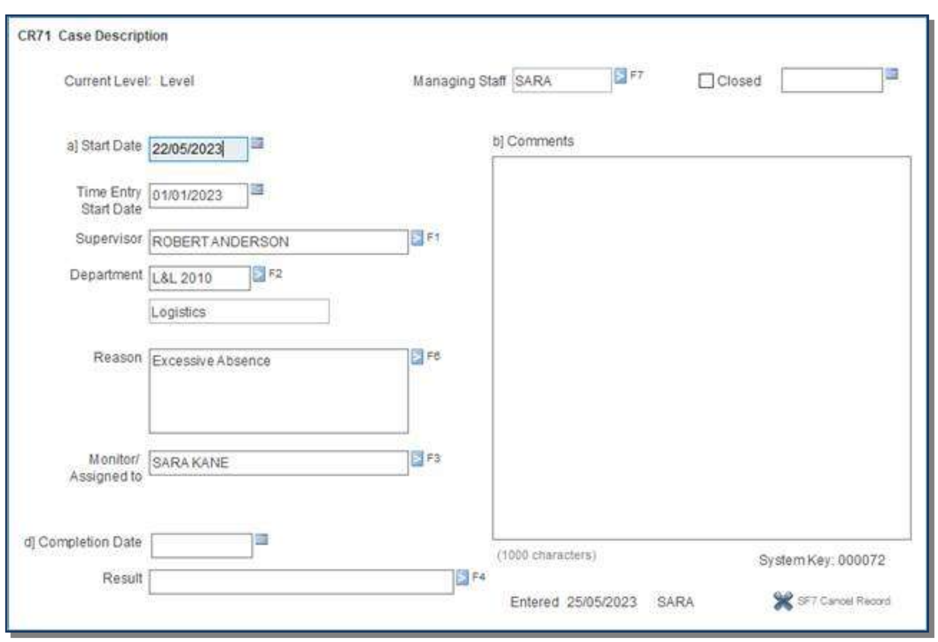
New/Open Case

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.

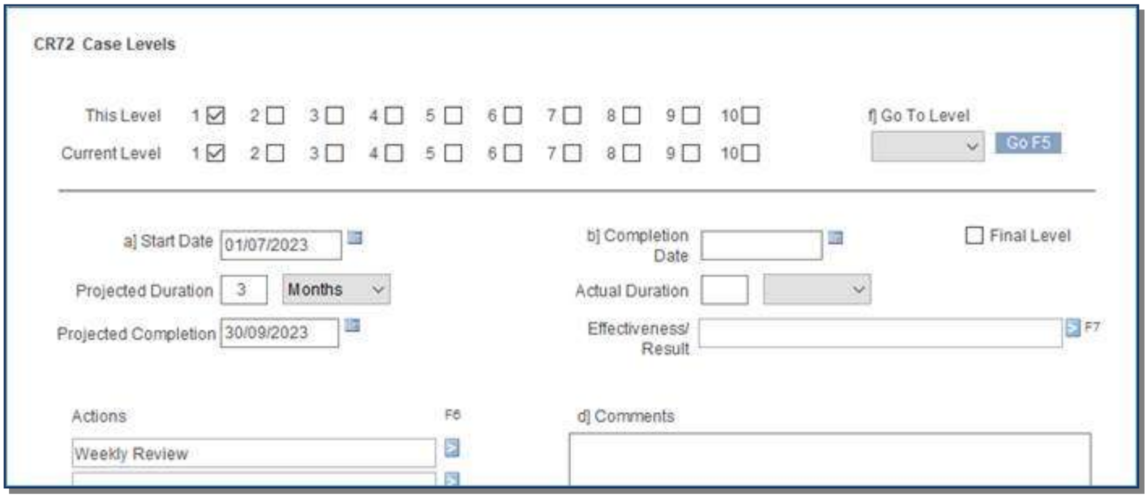
Case Description

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.



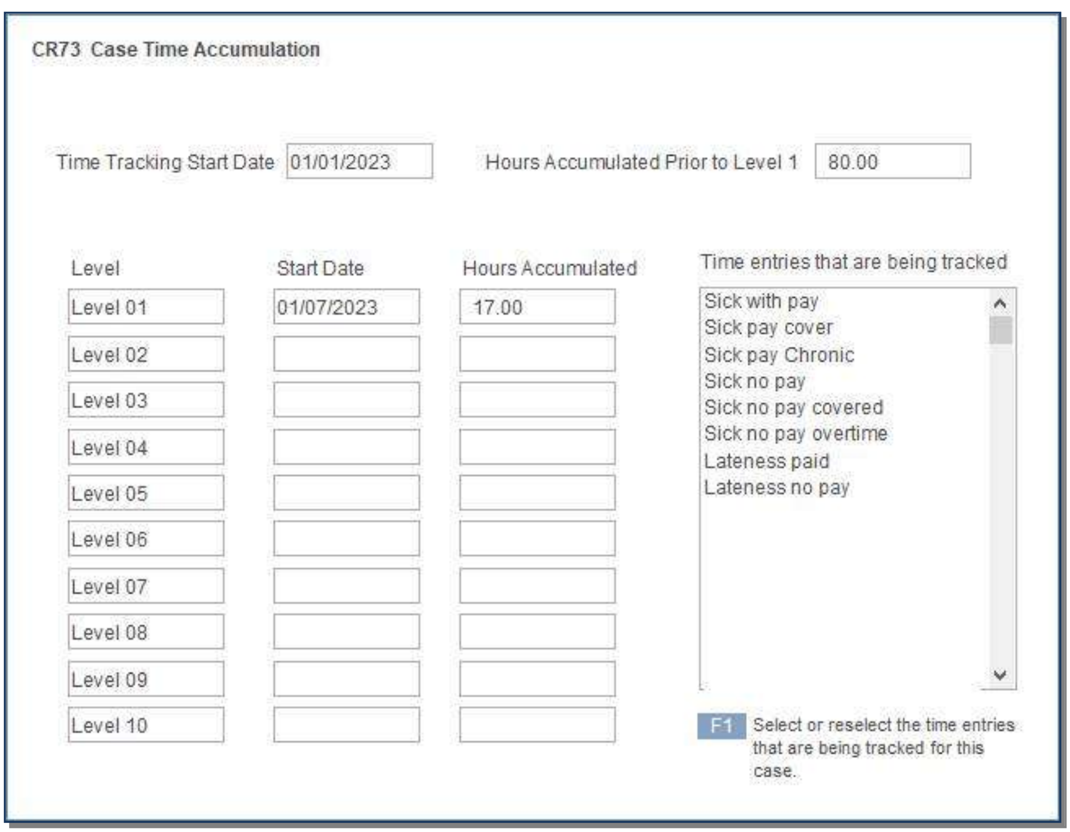
Case Levels

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

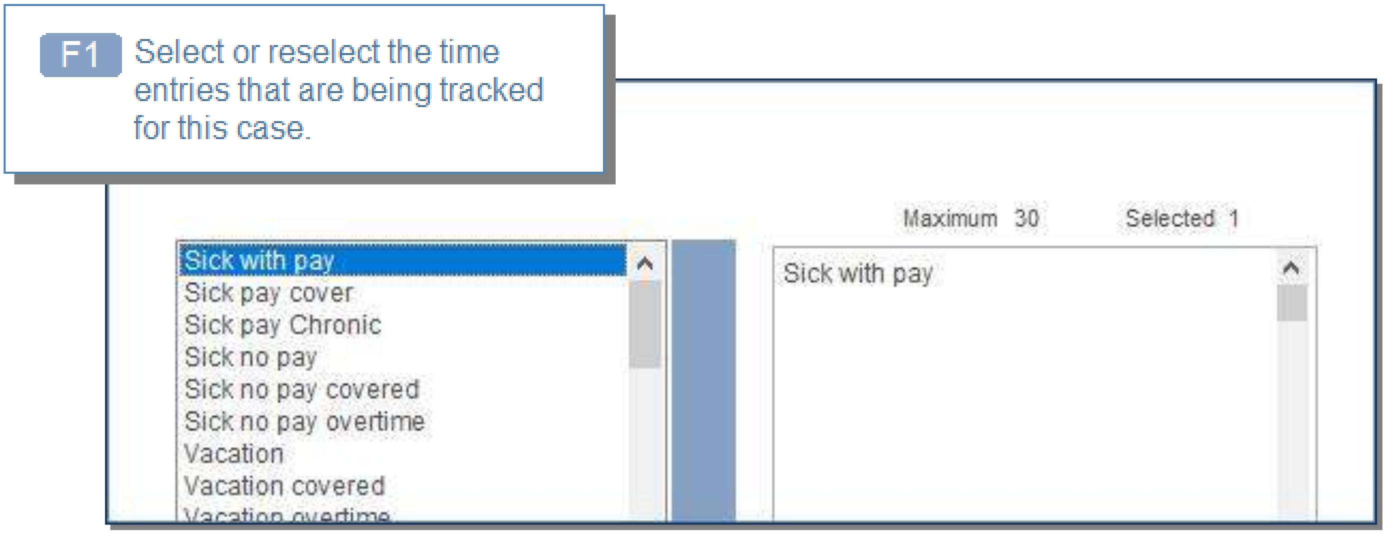


Case Time Accumulation

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.



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.

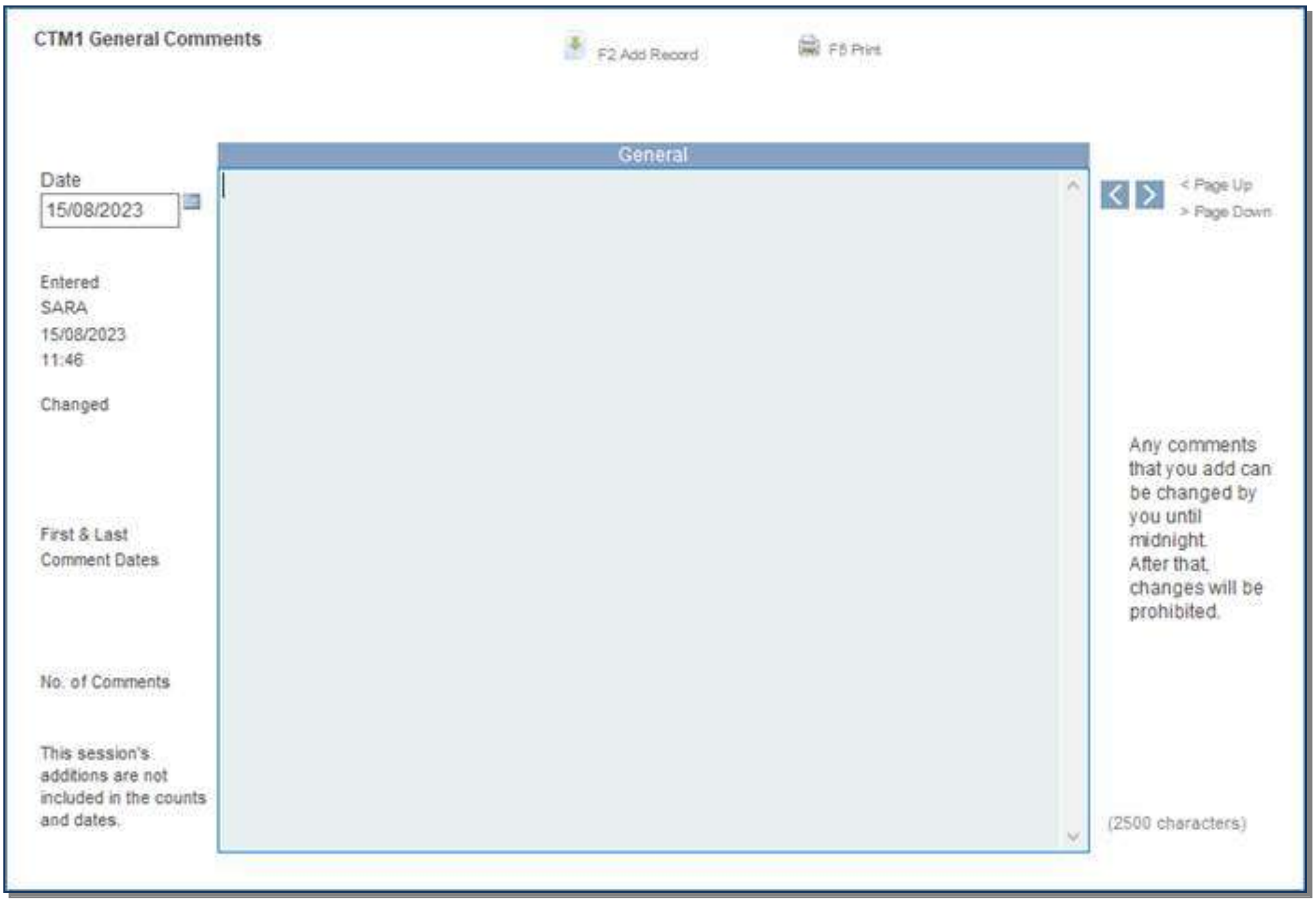


Case Comments

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

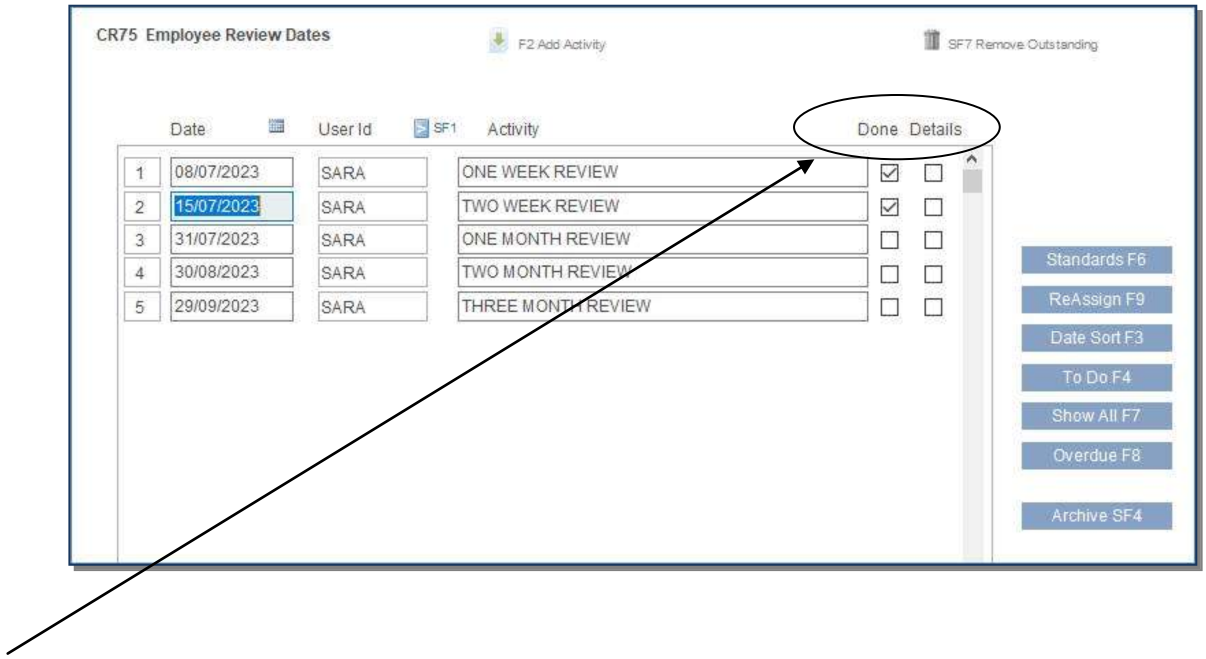
General Comments

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.



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.



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.

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.

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.

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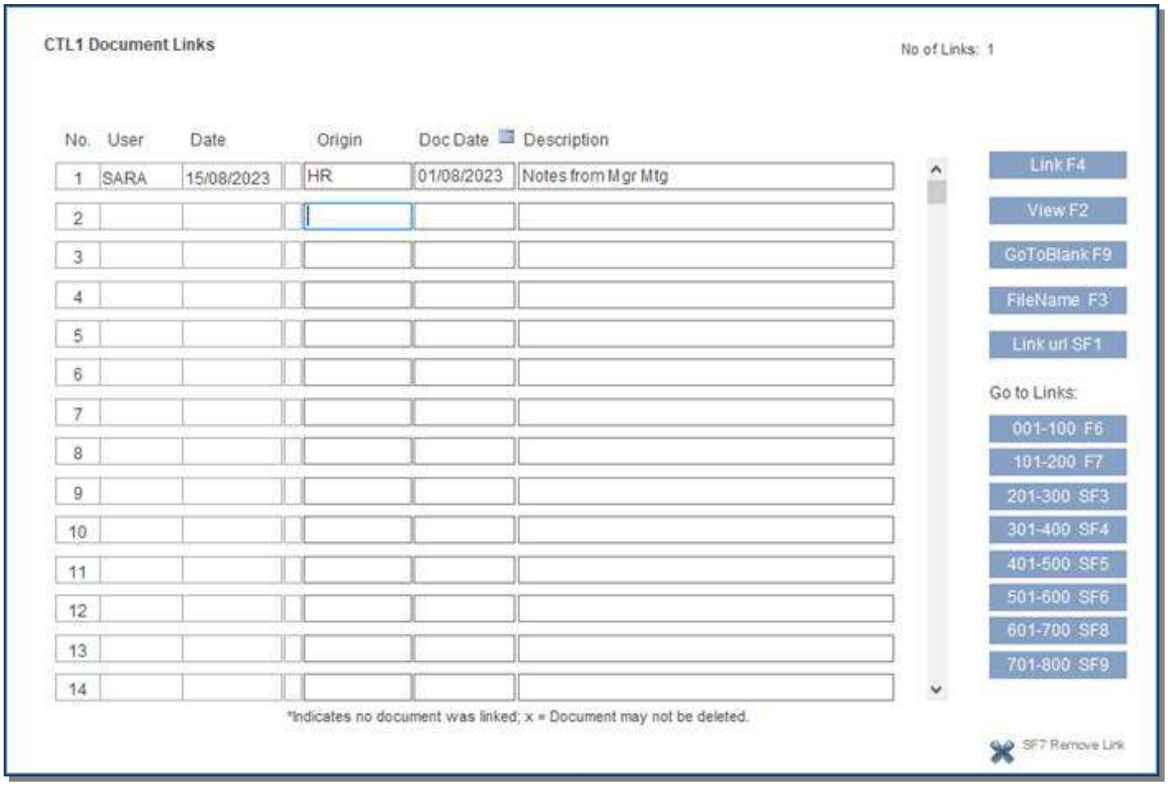

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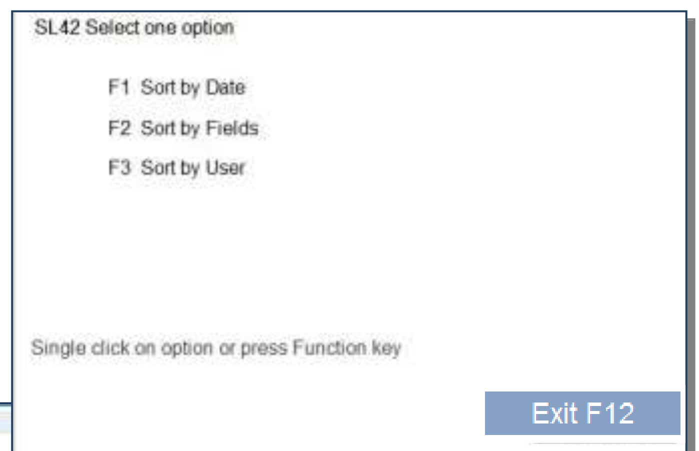
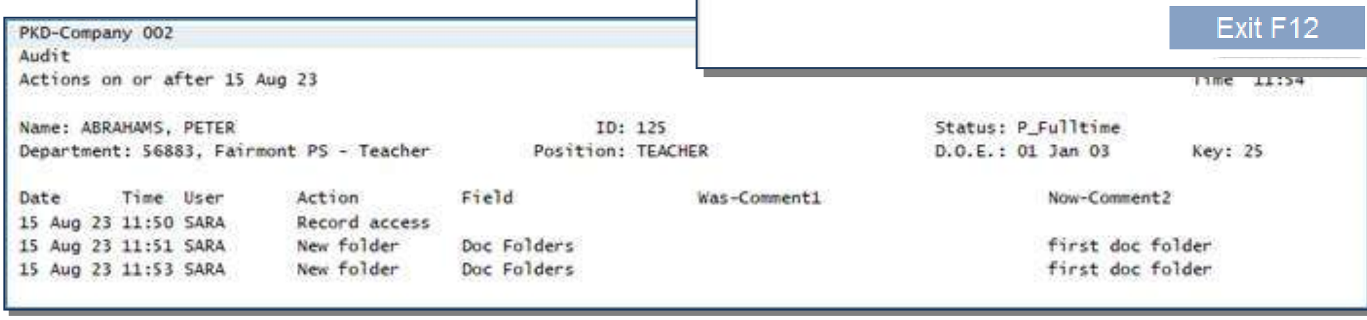
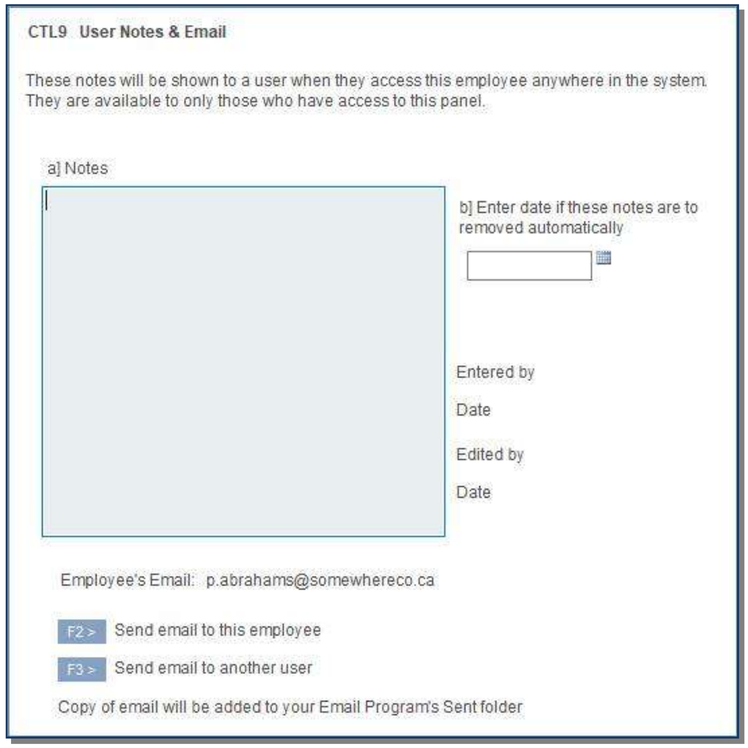




User Notes & Email

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.

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

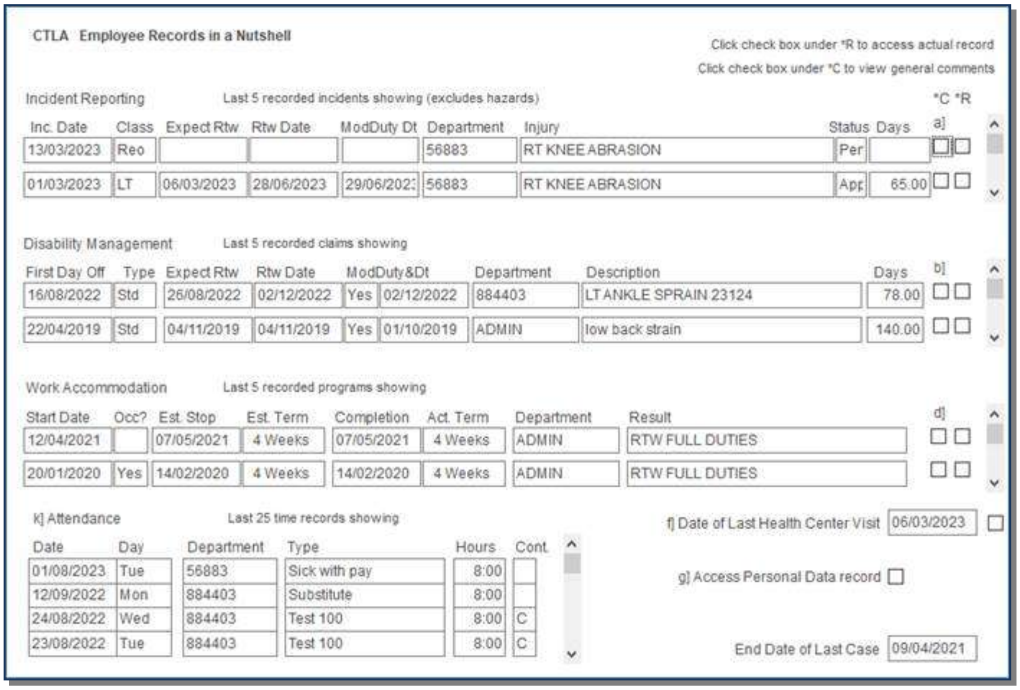
Demographics

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.

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) — *C *R

Inc. Date	Class	Expect Rtw	Rtw Date	ModDuty Dt	Department	Injury	Status	Days	a]
13/03/2023	Reo				56883	RT KNEE ABRASION	Per		
01/03/2023	LT	06/03/2023	28/06/2023	29/06/202:	56883	RT KNEE ABRASION	Apr	65.00	

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	
22/04/2019	Std	04/11/2019	04/11/2019	Yes	01/10/2019	ADMIN	low back strain	140.00	

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	
20/01/2020	Yes	14/02/2020	4 Weeks	14/02/2020	4 Weeks	ADMIN	RTW FULL DUTIES	

k] 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

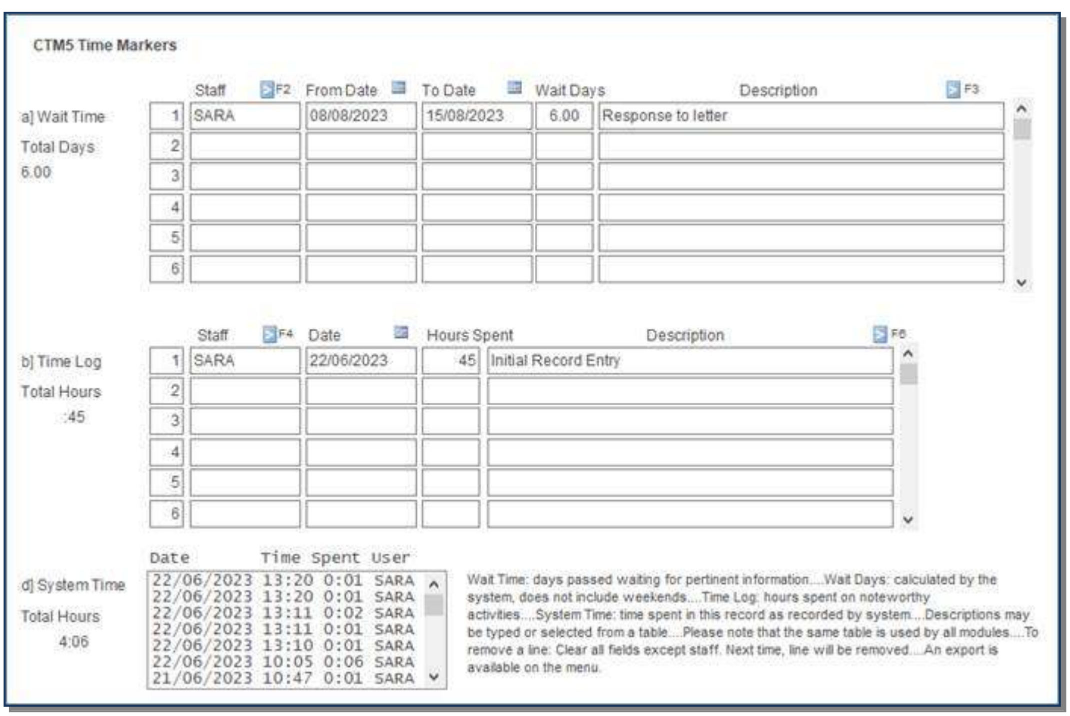
f] Date of Last Health Center Visit 06/03/2023

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 — Total Days 6.00

	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					

b] Time Log — Total Hours :45

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

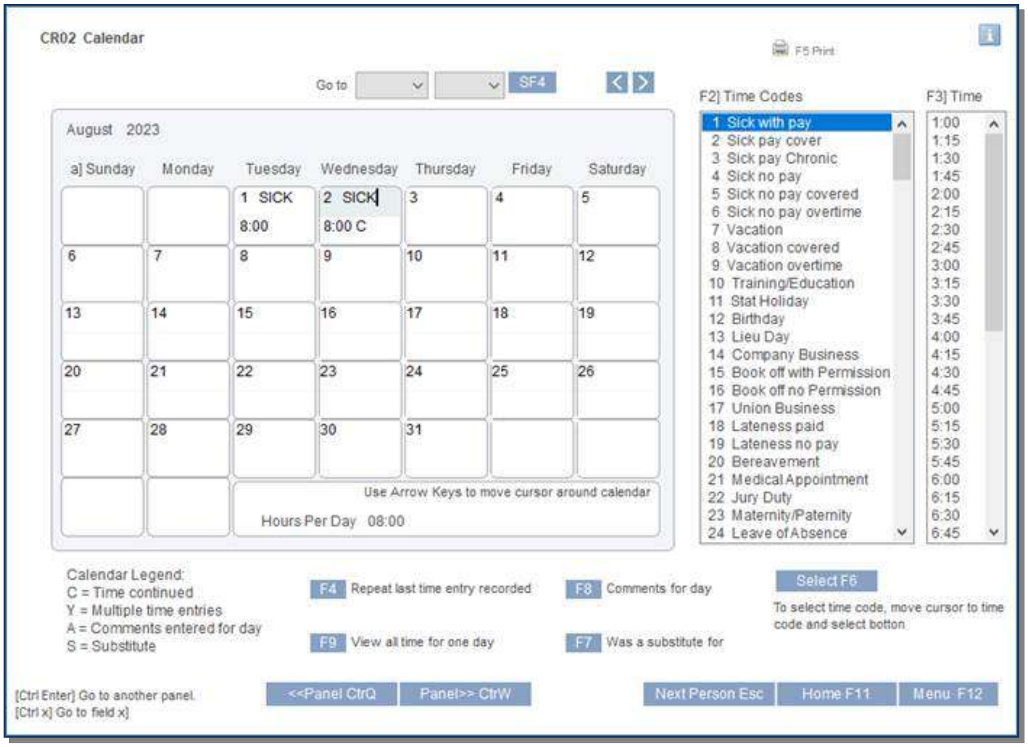
d] System Time — Total Hours 4:06

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

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.

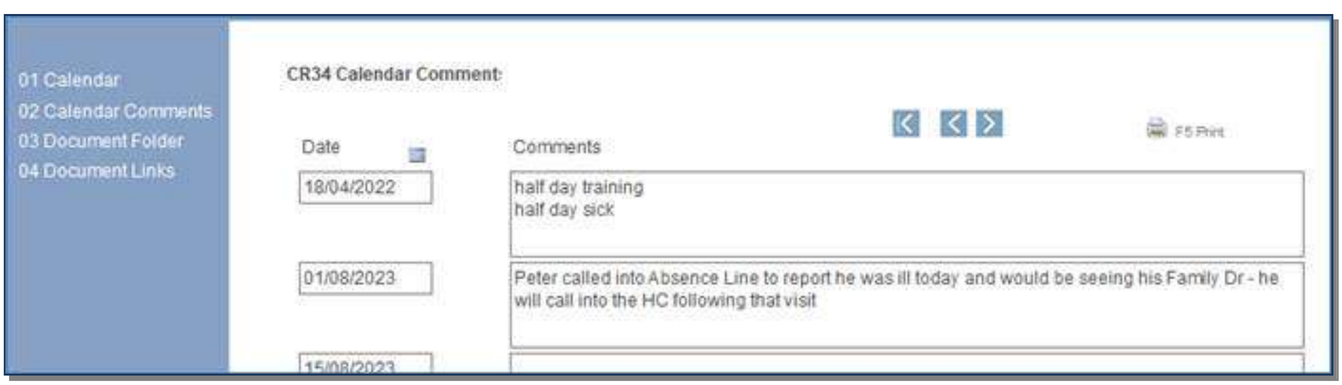
Calendar

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.



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.



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.

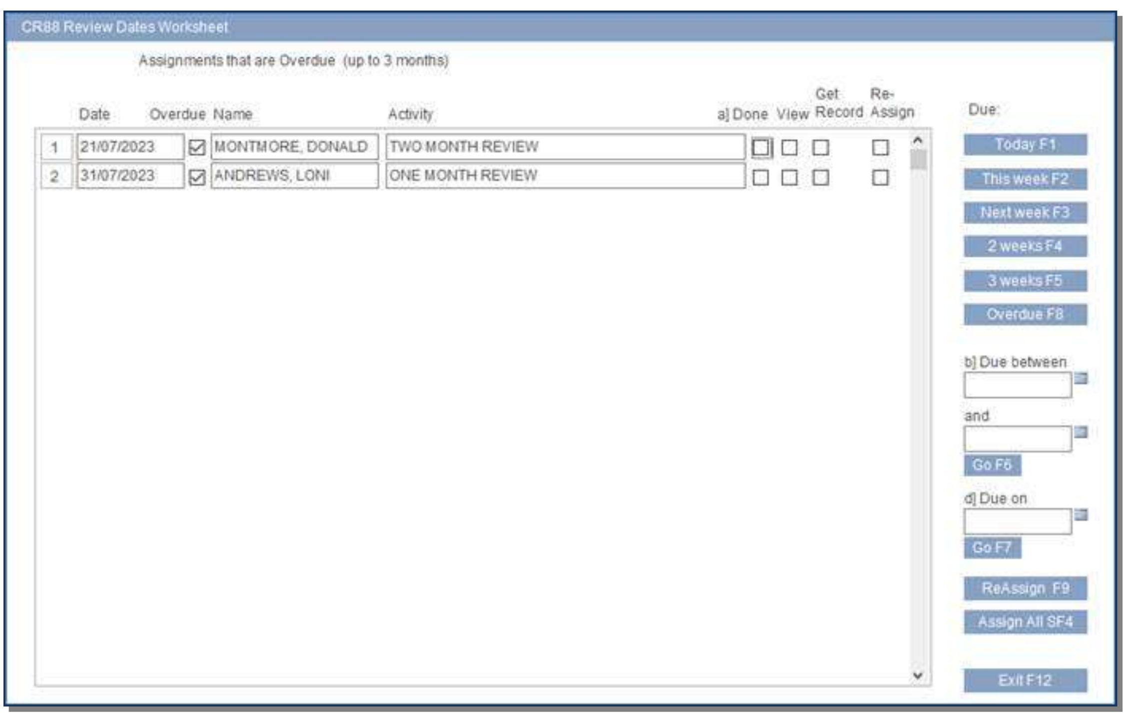
The **Done** check box will auto-fill a review date, stamping it with today's date and the User ID of the user currently logged into the system.

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.



Reports Available In Attendance & Absence Management

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R34 Calendar Comments
R2A Document Folder
TMB Audit
R24 Employee History
R05 Calendar – Selected Employee
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R43 Time Entry Audit
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R12 Department Summary
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R22 Two Year Comparison
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RHE Substitute Hours Report
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R03 Time Code Tables
R06 Time Sets & Corresponding Time Codes
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** Option to Create Export File in Addition to Report.

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