



Contracts

Objectives

- Define Contracts
- Assign Contract to Employee
- Generate Contracts
- Print Contracts
- Publish Contracts to iVisions

Contracts Overview

Using the contracts feature of the Human Resources module define the contracts used in your district, track which contracts are assigned to employees, and generate the contracts for signature.

Within the contract, define the contract with specific written text, include optional contract detail from the position, add additional written text, and (if desired) include an electronic signature. Addenda information can also be added to the contract.

Once a contract is generated, it may manually be edited for the individual position or supplemental pay contract. This does not impact the position or supplemental pay information for the employee.

Finally, if your district is using the iVisions web portal, employee contracts can be published to the portal for employees to review and accept/reject contracts.

Contract Maintenance

Human Resources | Contracts | Contract Maintenance

General: Define a Document Type and Document Title. The Document Title prints on the contract (avoid using any special characters in the title) and is also displayed in iVisions for users waiting to accept/reject contracts that have been published (See “Publishing Contracts to the iVisions Web Portal” on page 137).

Print Before Detail: Enter the wording you want printed on the contract, before the position information.



You can copy and paste text from any word processing application for the Print Before Detail and the Print After Detail sections. If you right-click and use the **Zoom** option, you are able to run a spell check on the text.

Print After Detail: Enter the wording you want printed in the contract, after the position information.

Contract Signature: You can enter the Title or Name of the person who is going to sign the contract or you can insert a signature by selecting Get Signature from the Actions menu. You can include one or more signature lines in the printed contract. Refer to the Help system for signature size specifications.

Print Options:

Employee Options:

- ☐ Include SSN
- ☐ Include EE Address
- ☐ Include Hire Date
- ☐ Include Seniority Date
- ☐ Include EE Group
- ☐ Include Employee ID
- ☐ Include Check Location
- ☐ Include Primary Worksite
- ☐ Include Total Amount
- ☐ Include Primary Job Title
- ☐ Include Document Name (default)
- ☐ Include Leave Plans
- ☐ Include Education
- ☐ Include Signatures
- ☐ Include Certificates

Position Options:

- Include Salary Schedule
- Include Amount
- Include Start Date
- Include End Date
- Include Department
- Include Position
- Include Position Location
- Include Hourly Rate
- Include Daily Rate
- Include Hrs Per Day
- Include Days
- Include Work Calendars
- Use Type as Position Description

Position Funding Options Include:

- Include Budget Codes
- Include Inactive Codes
- Include Budget Descriptions

Elect. Signature: On this tab, you can define up to three user defined fields for the selected contract. The UDF's will be displayed as part of the iVisions Employee Contract Approval window.

Contract Addenda

Human Resources | Contracts | Contract Addenda

As part of maintaining contracts, Contract Addenda is used to identify the types of addenda (extra duty pays) you need for your employees. While the most frequently used approach to defining addenda is to define a Position and/or a Supplemental Pay source, you can use this program to define contract addenda outside of the Payroll module.



Addenda that you set up here for contracts do not flow through to Payroll. These addenda must be set up as Positions or Supplemental Pays in Payroll to be paid.

Assigning Contract Types to Positions/Supplemental Pays

PR/HR | Employees | Employee Positions and Pay

Once you have defined your Contract Types, the next step is to mass assign these types to records in the employee positions and pay window. If the Mass Update command is unavailable to you, have your system administrator allow access to your Payroll User Role. If needed, you can also assign Contract Types individually while editing Position or Supplemental Pay records.



Activity (Required)

Mass Assigning Contract Types to Positions and Supplemental Pays

1. From the Employee Positions and Pay window, select **EE Monthly Pay Cycle** in the Group Filter Criteria, and then click **Apply Selection**.
2. Rearrange the grid layout so you can see the **Contract** and **Category** columns without having to scroll. You will notice that the majority of these records do not yet have a Contract assigned.
3. In the Category column use the **Filter by Selection** option to filter for all **Certified** positions/supplementals.
4. Select: Actions | Shortcuts | **Mass Update Records**.
5. From the **Data** field drop-down list, select **Contract**.
6. From the second drop-down list, select **Teacher Contract**.
7. In the Reason for Change field, enter "Assign Contract" and click **OK**.



Activity
(Required)

Contract Maintenance Exercise

Enter the following contract:

Document	Teacher - 1st Year
Type	Teacher Contract
Document Title	New Teacher
Print Before Detail	<p>Right-click in the window and select Zoom. Enter the following:</p> <p>This contract made and entered into as of this day of execution, set forth between the Capital City School District #1 acting through its Governing Board (hereinafter referred to as "District") and said teacher being duly certified to teach in this state (hereinafter referred to as "Teacher").</p> <ol style="list-style-type: none"> 1. The Teacher represents that s/he has a valid teaching certificate. In the case of new faculty members, this contract is subject to verification of previous experience. 2. The Teacher agrees to perform all duties assigned by the administrators and District as may be needed. Teacher further agrees to follow the orders of the District and to be subject to any performance evaluation process adopted by the District. 3. In consideration of said services rendered, the District agrees to pay the Teacher a salary based on education and prior experience for the current school year as listed below.
Print After Detail	<ol style="list-style-type: none"> 1. This contract contains the entire agreement between the parties. Any subsequent amendment or addenda to this contract must be in writing and signed by both parties. 2. Current Governing Board policies and administrative rules and regulations, as reasonably modified from time to time, are hereby made a part of this contract.
Contract Signature	<p>Title - Superintendent</p> <p>Name - Peter Abbott</p> <p>Go to Actions and choose Get Signature. Browse to C:\Infinite Visions\File Attachments Signatures. Select the signature for Peter Abbott.</p>
Print Options	Select all options except Include Budget Codes and include Inactive Codes. (only active if Budget Codes is selected).

Elect. Signature	<p>User Defined Field 1: Number of Checks</p> <p>Instructional Text: Select the number of checks you would like to receive from the drop-down</p> <p>User Defined Field 2: Read and Saved Contract</p> <p>Instructional Text: I have read this agreement and saved a copy of it for my records. </p> <p>User Defined Field 3: I Agree to Terms</p> <p>Instructional Text: I agree to the terms and conditions of the selected contract. </p>
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Employee Contracts

Human Resources | Contracts | Employee Contracts

Once you have defined contracts and assigned them to employees in the Employee Positions and Pay window, the next step is to generate the contract information. Generating contracts extracts all of the position and contract information from the contract definition, position information, and position contract assignment and places it in a record for the selected employee. You can then edit the employee's contract information and revise it as needed.



Adding a record here allows a Contract Addenda to be manually added.

From the Actions menu, you can perform the following tasks:

Create/Replace All Contracts: Select this command to generate all contracts and replace any existing contracts with newly generated ones.

Create/Replace Position Contracts: Select this command to generate all position contracts and replace any existing position contracts with newly generated contracts.

Create/Replace Supplemental Pay Contracts: Select this command to generate all supplemental contracts and replaces any existing supplemental contracts with newly generated contracts.

Create/Replace Contracts Shown in Grid: Select this command to generate contracts and replace contracts for only those shown in the grid.

Get New Position Contracts: After you have already generated contracts, select this command to generate contracts for just new position assignments.

Get New Supplemental Pay Contracts: After you have already generated contracts, select this command to generate contracts for just new supplemental pay assignments.

Copy Selected Contracts: Use this command to make a copy of the selected contract(s) selected in the grid. To copy a contract, the Is Contract field must = Yes and the Contract Status must be accepted.

Update Selected Contract from Position: Use this command to overwrite current contract with new Employee Position & Pay information. The contract can only be updated if Is Current is Yes, the Contract field is Unpublished and a contract document is unattached. If the contract you are updating is based on a position no longer attached to the employee, a message is displayed.

Multiple Employee Contract Update: Select this command to quickly change the start date, end date, number of days, or update salary schedule amounts for all records displayed in the grid.

Create Addenda Contracts from Excel: Select this command to create an addenda contract by importing the addenda from Excel.

Build Contract Mail Merge File. This creates an Excel file to use with a word processing application to create a mail merge contract.



Position Funding information will appear in the spreadsheet as a separate work book.

Expire Selected Published Contracts: Use this option to change the Contract Status of selected published contracts to Expired. Expired contracts cannot be accepted or rejected. The Status date reflects the date and time of expiration.

Unpublish Selected Contracts: Use this option to unpublish a published contract. Unpublishing a contract will return the employee contract to an Unpublished status.

Mass Update Selected: Assign Contract Documents: You can use this option to mass assign contract documents to be published in the iVisions web portal.

Mass Update Selected: Publish Contracts: Use this option to publish contracts to the portal. This will make the contracts available to the employees for review and signature (assuming the employees are registered portal users). This action also displays a prompt asking if you want to send an email notification to the employee. Employees with multiple contracts receive only one email.



You can check the status of Contracts published to iVisions by going to Human Resources | Contracts | Contracts Status (Portal). For more information, refer to the iVisions Business Administration Guide.

Printing Contracts

HR | Reports | Contracts or;

HR | Contracts | Employee Contracts | Actions | Shortcuts | Print Contracts

Select the contracts you would like to print based on the following options:

- Run by contract, employee, status, employee category, or group
- Sort by last name or SSN
- Group by check location
- Print on legal paper
- Attempt to keep After Text section with signatures
- Mask SSN (option available only if authorized)

Print Information – Input the **fiscal year** and contract issue **date**, as these are displayed on the contracts you print. Add additional comments to print after the signature.

Distribution Options:

- **Append Contract to Employee Document** creates a PDF of the contract and attaches the document to the Employee record.
- **Email Contract to Employee** and use the CC Email to email a copy to another individual.



Activities (Required)

Processing Employee Contracts

Scenario: Owen Money is working on getting out next years employee contracts. He now has the approved salary schedule amounts for next year and is ready to update his salary schedule projection information.

Activity: Forecasting Next Year Salary Schedule Amounts

The process for globally updating next years projected salary schedule amounts is done in the Salary Schedule Maintenance screen of Payroll/HR.

1. Select: **Human Resources | Salary Schedules | Salary Schedule Maintenance**.
2. Open the **Certified** Salary Schedule in Edit Mode.
3. Click on the **Projection** tab. Currently the projection amounts match current year amounts. Owen wants to apply a 4% increase to these salaries for next year.
4. Highlight all the cells on the **Projection** tab.
5. From the Actions menu, select **Apply Formula**.
6. Enter $*1.04$ in the Formula to Apply field. This will multiply the value in each cell by this number and increase the salaries by 4%. Leave the decimal at 2.
7. Review the results then click **OK** to save the changes. The system will update the salary projections for all positions tied to the schedule. No current year salary amounts are affected.

Activity: Moving Employees on the Salary Schedule

In most cases, your employees will be advancing on the salary schedule next year. In this activity, we'll advance the certified employees one Step (Year) for next year's projections.

1. Open the **Certified** Salary Schedule in Edit Mode.
2. Click on the **Projection Positions** tab.
3. Select **Move Positions Down** from the Actions menu, which actually advances the positions by one step on the schedule.
4. A report is generated for any employees that could not move on the schedule because they were already at the maximum step.
5. Close the Report Viewer.
6. Review the results of the move, and then click **OK** to save the changes. The system will update the salary projections for all positions tied to the schedule. No current year salary placements are affected.



In the real world, you would repeat these steps for all your current salary schedules. For this training, we'll just be updating the Certified schedule.

Activity: Generating Employee Contract Information:

Now that the next year amounts are set up and linked to positions, you're ready to generate employee contract information.

1. Select: **Human Resources | Contracts | Employee Contracts**.
2. Click the **Apply Selection** button. Notice there are just a few contract records generated at this time.
3. Select **Create/Replace All Contracts** from the Actions menu.
4. In the Multiple Employee Contract Assignment window, choose the selection parameters as applicable and then click **OK**.
5. Click **Yes** to proceed.
6. Employee Contract information is generated for all positions and supplemental pays that had a contract type assigned to them in the EE Positions and Pay window.
7. The next message is very important. It asks if you want to use Next Year Amounts. In this case, we want to click **Yes**.
8. Review the information in the grid. You can double-click a record to edit and then make manual changes.



Once you have generated your initial contract information and made manual edits, it is very important that you **DO NOT** run any of the **Create/Replace** Action menu items, unless you truly want to start over and lose any manual changes.

If new employees are hired after you generated contract information, you should use the **Get New Positions or Supplemental Pay Contracts** commands. This keeps contract information that was previously generated in place, and only appends new records.

Activity: Printing Employee Contracts

Once you have contract information generated, the easiest way to print and distribute contracts is by using the contract report writer, which picks up the text and selections you made for the contract type in the Contract Maintenance window. If you do not like the format of these canned contracts, consider building a Microsoft Excel mail merge file instead, using a Microsoft Word document as your contract template.

1. Select: **Human Resources | Reports | Contracts**.
2. In the Selection Parameters section, click the Contract dropdown list and select **Teacher Contract**.
3. Click the **OK** button and the teacher contracts will be previewed for you in the report viewer.
4. Review the information, then close the report viewer.

Activity: Distributing Employee Contracts

After you have printed contracts for approval signatures, you can also append a copy of the contract (without the signatures) to each employee as a document attachment. To do this, you should first set up an HR Document Type (HR | Configuration | HR Document Types) for the new contract.

For this next activity, the document type has already been created and OMoney has been given access (Security | Workflow Configuration | Payroll User Roles | HR Document Types) to view this type of document.

1. Select: **Human Resources | Reports | Contracts**.
2. In the Selection Parameters section, click the Contract dropdown list and select **Teacher Contract**. In the **Employee Name** field select Claire Asday.
3. In the Distribution Options section, put a check mark in the **Append Contract to Employee Documents** box.
4. Then, select the appropriate FY20xx **Contract Document Type**.
5. Click the **OK** button. The system appends the records. - **BE PATIENT** - this may take several minutes.

Publishing Contracts to the iVisions Web Portal

Human Resources | Contracts | Employee Contracts

If your district has the iVisions Web Portal, you have the option of publishing your contract information for employees to electronically accept or reject. The process begins by appending the contract to the employee as a document (as outlined in the previous section). Once that step is completed, you can use a mass update function in the Employee Contracts window to publish the contracts to iVisions. For complete step-by-step instruction on publishing contracts, please refer to the Help system.



Activities (Optional)

Publishing Contracts to the iVisions Web Portal

1. From the Employee Contracts window, select **Teacher Contract** in the Contract Filter Criteria and then click **Apply Selection**.
2. Highlight all of the records displayed in the grid.
3. From the Actions menu, select **Mass Update: Assign Contract Documents**. This command creates an association between the employee contract records and the appended FYxxxx Contract Document Type. You can individually create this association by editing an employee contract record, and selecting the document from the Select Contract Document dropdown list.
4. Highlight all of the records displayed in the grid again.
5. From the Actions menu, select **Mass Update: Publish Contracts**. This command actually makes the contracts available to employees in the iVisions Web Portal.

Viewing Contract Information in iVisions

1. Log into the web portal as Claire Asday (**Casday, v**).
2. Select: **Employee Resources | Employee Contract Approval**.
3. Review the contract information that has been published and **Accept** or **Reject** as appropriate. Employees must make a selection for any required User Defined Fields or the system does not allow the contract to be accepted.

Contract Status (Portal)

Human Resources | Contracts | Contract Status (Portal)

Use the Contract Status window to review the status of employee contracts that have been published to the portal.

From the Actions menu, you can perform the following tasks:

Print Selected Employee Contract & Acceptance Report: Use this command to print the employee contract and Acceptance Report that details date/time of acceptance, employee comments, UDF and the Electronic Contract Signature text.

Email Highlighted Employees: Use this command to send the selected employee(s) an email regarding the status of their contract. The employee must have a valid email address entered in their record (Payroll/HR | Employees | Employee Maintenance).



Employees with multiple contracts receive only one email.

Notes about Contracts

- If you use Salary Schedules, make sure you build the Projection amounts before starting contracts. Once salary schedules are complete and employees are linked, copy them to projected. This illustrates to clients that HR can work on next year contracts without interfering with current Payroll.
- If you have manually added Contract Addenda (as opposed to setting up supplemental pays), be advised that the create/replace commands overwrite any manual addenda you have created in the Employee Contracts window, along with any other manual changes.
- If you have set the contract up to include the employee's Social Security Number, the system uses whatever masking has been established in the Payroll | Configuration | Payroll Default Settings window.
- If you publish contracts to employees for signatures through iVisions, you can add text for the electronic signature in Human Resources.
- If you want, you can add up to three Contract Approval User Defined Fields in Human Resources | Contracts | Contract Maintenance | Electronic Signature tab to be displayed in iVisions as part of the employee's Contract Approval window.
- The system displays a date/time stamp above the employee signature when the employee electronically accepts/rejects the contract (e.g., Electronically Accepted on xx/xx/xxxx at 00:00 AM/PM) through the portal.

Section Review

- Why should you build your projections before printing contracts?
- Running the Create/Replace Actions will undo any manual changes you've made to contracts. (True or False)
- How do you mass assign a copy of an employee contract as an employee document?
- List two ways that you can send contracts to employees.