

# Skyward User's Manual




## Skyward School Business Suite, Time Off \ Leave Accounting -

Prepared for  
Leon County School District

Date: January 29, 2016

Version 1.4



The screenshot displays two overlapping software windows. The top window is titled "Transaction Detail Maintenance" and contains the following fields:

- Name: FUGERYER000 - Fugerescr, Yer L.
- Group Code: 9
- \* Time Off: DOCKM (dropdown) DOCKM - PT 1, 3, 5
- Code Type: Hours Hours per day: 7.5000
- \* Date: 06/25/2015
- \* Trans. Type: L - Unpaid
- Amount: 7.0000 Hours
- Reason: UNPD UNPAID LEAVE
- Description: UNPAID LEAVE

Buttons on the right include "Save and Add Another", "Save", and "Back". Below the fields is a table for "Totals for code: DOCKM":

	Before	After
Allocated:	0.0000	
Used:	0.0000	
Left:	0.0000	
Unpaid:	0.0000	

The bottom window is the "Skyward Training Database" dashboard. It features a navigation menu with "Home", "Employee", and "Time Off" options. A "Time Off" dropdown menu is open, showing "Time Off Limited Access" and "Reports". Other dashboard elements include:

- My Print Queue: No items available.
- Weather: Displaying weather for 32311 (change). Conditions for Tallahassee, FL at 1:59 pm EDT Friday, August 28, 2015. Current Conditions: Light Rain with Thunder, 81 F. Forecast: Fri - Scattered Thunderstorms. High: 85 Low: 71. Sat - Scattered Thunderstorms. High: 87 Low: 70. Sun - Scattered Thunderstorms. High: 92 Low: 70. Mon - PM Thunderstorms. High: 90 Low: 71. Tue - Thunderstorms. High: 90 Low: 71.
- Jump to Other Systems: Employee Access, Financial Management, Human Resources.
- Recent Programs: Human Resources Home, WH, Time Off Limited Access, WHTOOLA, Employee Access Home, My Status, Financial Management Home, WF, User Preferences, WFAPUMRUP, Employee Profile, WHIEPIEP, Requisitions, WFAPUMRREIRC, Chart of Accounts, WFVAMICAICA, Vendor Profile, WFVEIVP.
- District News: No news to display.
- Available Funds: as of 08/28/15 at 2:00 AM

## TABLE OF CONTENTS

Chapter 1. Time Off \ Leave Accounting.....	3
Overview .....	3
Time off Codes .....	3
Chapter 2. Entering Leave in the Web.....	4
Step 1: Log into Skyward Web .....	4
Step 2: Entering <b>Regular</b> Leave.....	4
Step 3: Regular Leave Detail Transaction Report (DTR).....	5
Choosing the report parameters: .....	7
Selection Parameters:.....	8
Step 4: Entering <b>Leave without Pay</b> (LWOP) .....	10
Chapter 3. Time-Off Transaction and Reason Codes.....	11
Bereavement.....	11
Jury Duty .....	11
Military Leave.....	12
Temp Duty.....	12
Workers Comp .....	12
Annual Leave.....	13
Sick Leave .....	13
Sick Leave (Personal Charged to Sick).....	14

<b>Author</b>		Skyward Management Team	
<b>Title</b>		Time Off \ Leave Accounting	
<b>File Name</b>		SKYWARD - Time Off_ Leave Accounting.Docx	
<b>Milestone</b>		End User Training	
<b>Last Edited</b>		1/29/2016 5:12 PM	
<b>Number of Pages</b>		14	
<b>Version</b>	<b>Revision Date</b>	<b>Revision Comments</b>	<b>Author</b>
1.0	05/29/2013	Created Document	Johnny Nash
1.1	12/6/2013	Updated to new Formatting Style	Scott Whittle
1.2	8/28/2015	Removed PAC /update to Web LWOP/Add Codes	Scott Whittle/Sandi Basham
1.3	11/02/2015	Updated new LWOP and bereavement updates	Scott Whittle/Sandi Basham
1.4	01/29/2016	Updated Reg Leave DTR / Deleted LWOP DTR	Scott Whittle/Sandi Basham

## Chapter 1. Time Off \ Leave Accounting

---

### Overview

This chapter discusses the method through which the Bookkeeper or other designated staff will enter time off data for employees.

**In Skyward – Time off is totally separate from payroll (Except LWOP).**

LCS time off will be in hours (not days). Each building location will only be able to enter employee's time off for their building. If you require access to employees in other locations please contact Enrollment Services. Leave slips and any required documentation are to be submitted to Enrollment Services.

### Time off Codes

The following is a list of Time-Off transaction codes and descriptions.

<i>Time Off Code</i>	<b>TO Code Description</b>	<b>Purpose</b>
<i>ANUAL</i>	Annual	Annual Leave
<i>**BANK</i>	Banked Sick Leave	Same as sick leave. Use all sick leave before using bank
<i>BEREV</i>	Bereavement	Bereavement
<i>JURY</i>	Jury Duty	Jury Duty
<i>MILV</i>	Military Leave	Military Leave
<i>*PL1</i>	Pool 1	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL2</i>	Pool 2	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL3</i>	Pool 3	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL4</i>	Pool 4	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL5</i>	Pool 5	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL6</i>	Pool 6	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL7</i>	Pool 7	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL8</i>	Pool 8	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL9</i>	Pool 9	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL10</i>	Pool 10	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>*PL11</i>	Pool 11	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>SICK</i>	Sick Leave	Personal or Family Illness, Doctor, or Dental Appt, Approved "Parental" Leave
<i>TEMP</i>	Temp Duty	Workshops or Conferences
<i>DOCK</i>	Dock PT 2,6,9	LWOP
<i>DOCKM</i>	Dock PT 1,3,5	LWOP
<i>WCOMP</i>	Workers Compensation	Workers Comp used

*\*PL-Sick Leave Pools, only available for Pay Type 09, sick leave is used from the oldest pool first e.g. PL1 or the lowest numbered pool.*

*\*\* Banked Leave time is only for Director level or above*

## Chapter 2. Entering Leave in the Web

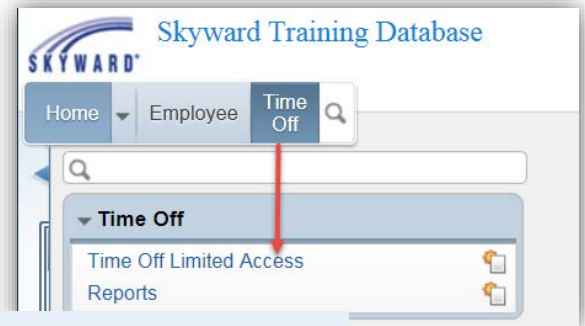


**ALERT: Make sure you submit LWOP by Pay Type payroll deadlines !!**



### Step 1: Log into Skyward Web

- Click on **Human Resources**, → **Time Off** → **Time Off Limited Access**.
- Scroll down to select the employee and expand the **Time Off Transactions**.
- Click '**Add Transaction Detail**'.



**Time Off Limited Access** ☆

Views: Active Employees Filters: \*Skyward Default

Last Name ▲	First	Middle	Employee Type	Building
Fugerescr	Yer	L	TEACHER	BUILDING -1161

Expand All Collapse All Modify Details (displaying 2 of 2) View Printable Details

▼ Time Off Info

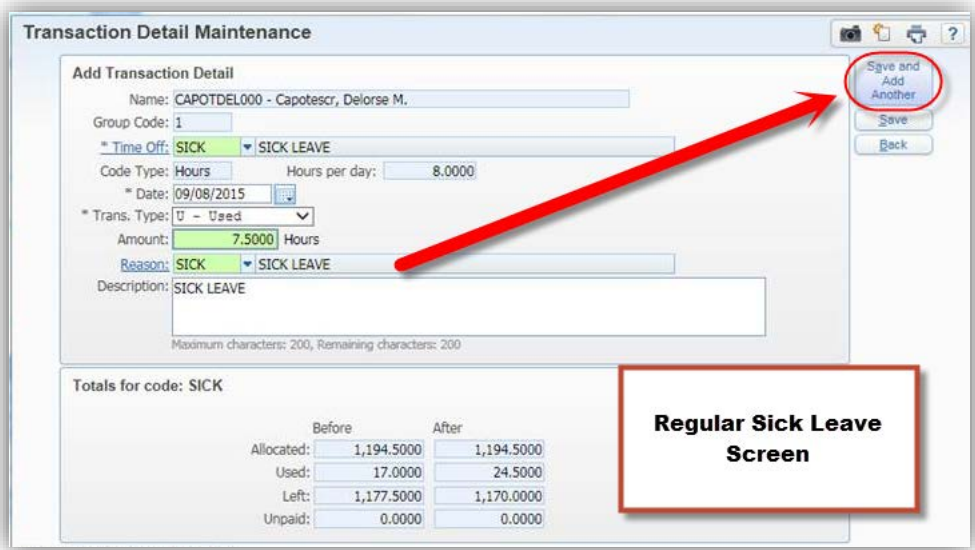
Time Off Calendar: Participates in Sick Bank: No

▼ Time Off Transactions View All Trans Detail Add Transaction Detail

Group	Code	Date	Description	Allocated	Used
Clone 1	SICK	09/30/2015	MONTHLY ALLOCATION	7.5000	
Clone 1	SICK	08/31/2015	MONTHLY ALLOCATION	7.5000	
Clone 1	SICK	08/10/2015	INITIAL ALLOCATION	30.0000	

### Step 2: Entering Regular Leave

- Enter the appropriate codes:
  - Time Off**
  - Date Leave Used**
  - Trans Type** (*USED for all time off codes except Dock and DockM*)
  - Hours Used**
  - Reason Code** –(*Tab through the description box to autofill the text.*)

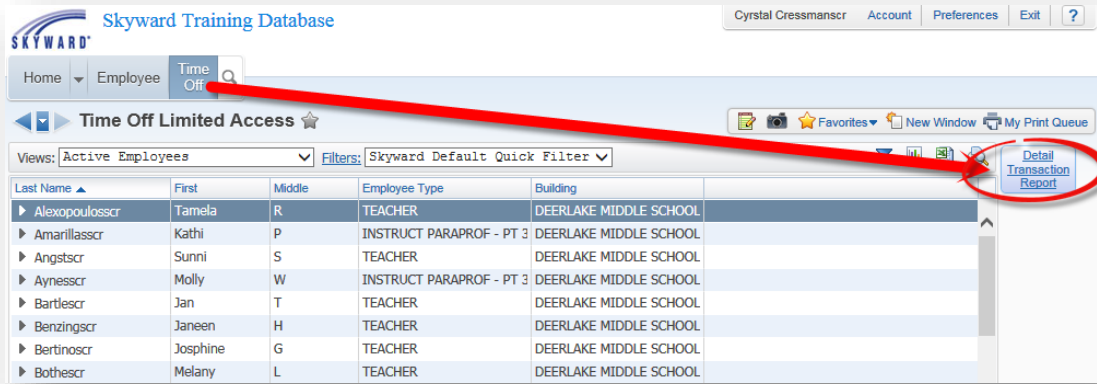


b. Select 'Save'

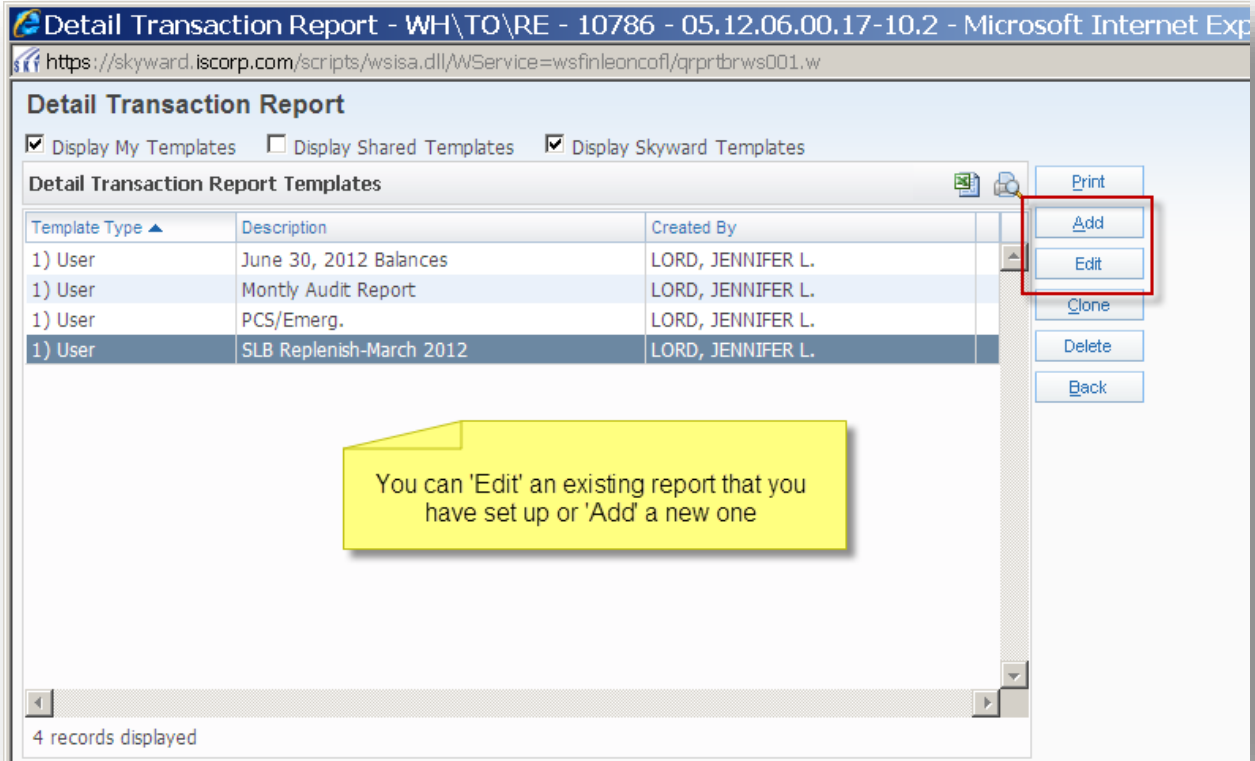
**Step 3: Regular Leave Detail Transaction Report (DTR)**

(After all time has been entered for your employees in Time Off Limited Access) You will need to run a detail transaction report.

a. Click "Detail Transaction Report"



- b. Select either **'Add'** to make a new one  
- or -
- c. Select **'Edit'** to modify and existing report you have setup



Template Type ▲	Description	Created By
1) User	June 30, 2012 Balances	LORD, JENNIFER L.
1) User	Montly Audit Report	LORD, JENNIFER L.
1) User	PCS/Emerg.	LORD, JENNIFER L.
1) User	SLB Replenish-March 2012	LORD, JENNIFER L.

You can 'Edit' an existing report that you have set up or 'Add' a new one

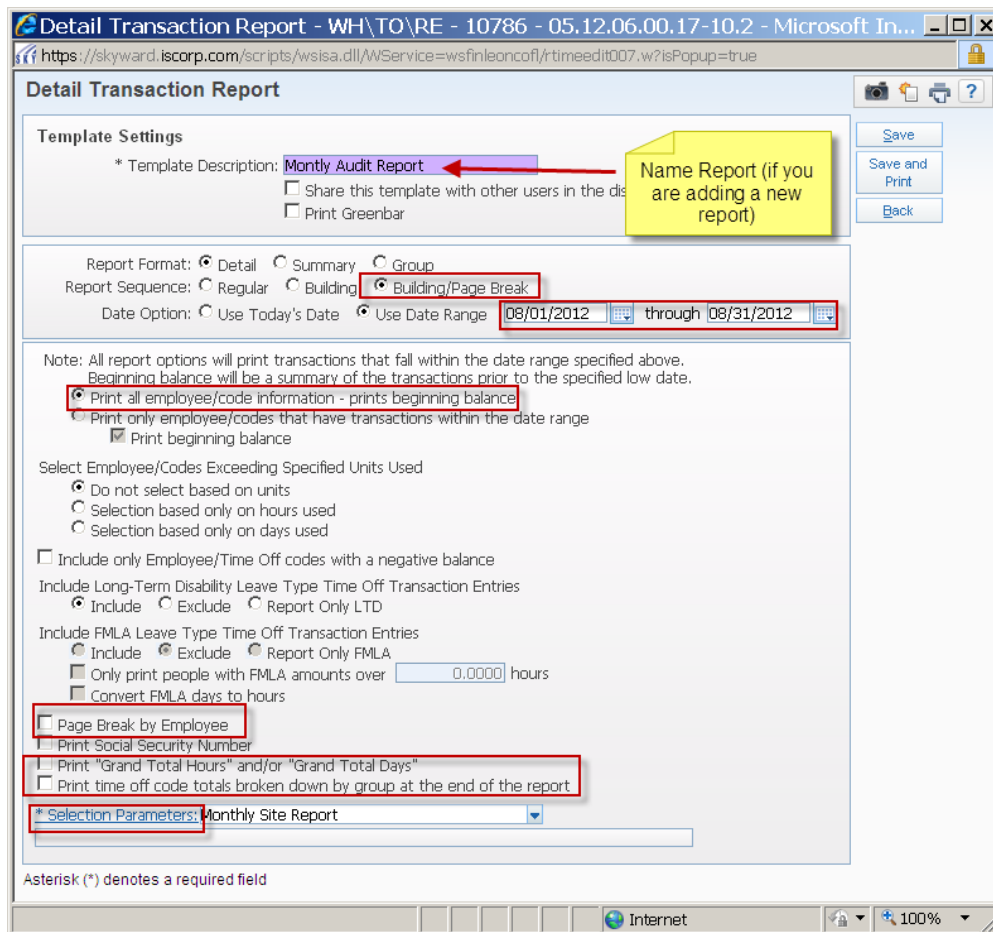
4 records displayed

*Add or Edit a Report*

**Choosing the report parameters:**

There are many different ways to run this report. It depends on what you are trying to accomplish.

- Make sure you check **'Building/Page Break'** for the Report Sequence. If you are responsible for two or more sites, it will do a page break between each site.
- **Date Option: Use Date Range.** You will need to change this each month that you run the report. If you want just a balance as of a certain date, then enter the same date as the beginning and the ending date (i.e. **8/01/15** through **8/31/15**) This will give you the employee's balance as of **8/31/15**.
- Make sure you **'Print all employee/code information – prints beginning balance'**. This will list all employees at your site regardless if they used/earned leave for the time period specified.
- Check **'Page Break by Employee'** only if you need employees to print one per page (i.e. *giving employees their balances*). Otherwise, don't check this box.
- Make sure **'Print "Grand Total Hours" and/or "Grand Total Days" and "Print time off code totals broken down by group at the end of the report"** are unchecked.
- Click on **'Selection Parameters'** each month to change your parameter selections\*  
>(\*See Selections Parameters on next page)



**Detail Transaction Report**

Template Settings

\* Template Description: **Monthly Audit Report** ← Name Report (if you are adding a new report)

Report Format:  Detail  Summary  Group

Report Sequence:  Regular  **Building/Page Break**

Date Option:  Use Today's Date  Use Date Range **08/01/2012** through **08/31/2012**

Note: All report options will print transactions that fall within the date range specified above. Beginning balance will be a summary of the transactions prior to the specified low date.

**Print all employee/code information - prints beginning balance**

Print only employee/codes that have transactions within the date range

Print beginning balance

Select Employee/Codes Exceeding Specified Units Used

Do not select based on units

Selection based only on hours used

Selection based only on days used

Include only Employee/Time Off codes with a negative balance

Include Long-Term Disability Leave Type Time Off Transaction Entries

Include  Exclude  Report Only LTD

Include FMLA Leave Type Time Off Transaction Entries

Include  Exclude  Report Only FMLA

Only print people with FMLA amounts over  hours

Convert FMLA days to hours

Page Break by Employee

Print Social Security Number

Print "Grand Total Hours" and/or "Grand Total Days"

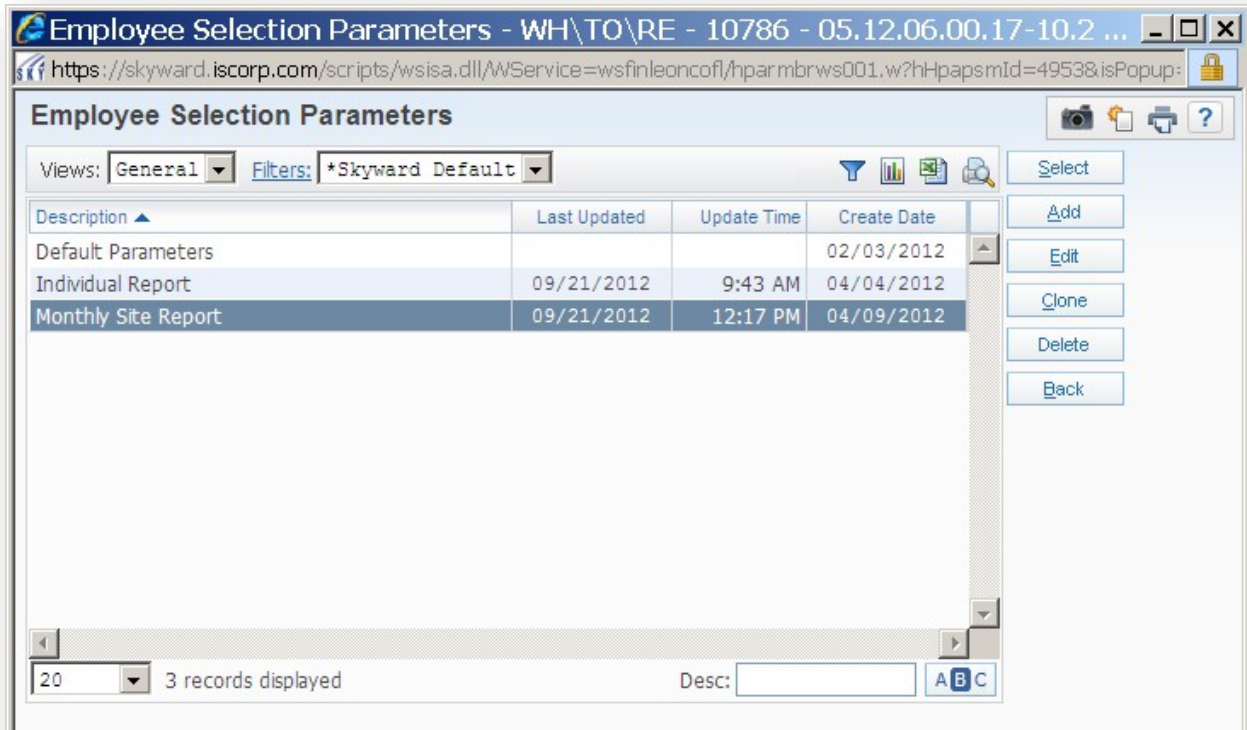
Print time off code totals broken down by group at the end of the report.

\* Selection Parameters: Monthly Site Report

Asterisk (\*) denotes a required field

**Selection Parameters:**

You can either **edit** an existing parameter or **add** a new one. I have only two reports I use, Individual Report and Monthly Site Report. I edit them each month and change the parameters accordingly. This way I don't have a bunch of reports.



- You can either run a report **by your cost center(s)** or **for an individual\***  
 (\*See screenshot on next page)
  - 'Employee Ranges' will run it for the cost center(s)
  - The 'Individual Employees' will run it for individual employees that you choose
- Make sure you check '**Excluded**' for the Inactive Profiles and Inactive Time Off Setup Records (*this will exclude any terminated employees or time off codes that have been inactivated*)
- Select **Building Code** (*if running report for 'Employee Ranges'*)
  - Find your cost center number and check the box
- Select **Individual Employee** (*if running report for 'Individual Employee'*)
  - Type last name of employee you need and check the box



**Employee Selection Parameters**

Description: Monthly Site Report

Employee Selection By:  Employee Ranges  Individual Employees

**Employee Ranges**

Alphakey Range: Low High  
 ZZZZZZZZZZZZ

Inactive Profiles should be:  Included  Excluded  Processed Alone

Codes: [Select Employee Building:](#)

Employee Building	1171 - ROBERTS ELEMENTARY SCHOOL
Employee Check Location	
Employee Type	

**Additional Codes and Settings**

Inactive Time Off Setup Records should be:  Included  Excluded  Processed Alone

Codes: [Select Time Off Codes:](#)

Time Off Codes	*All Time Off Codes
Reason	

Buttons: Save, Back, Reset to Defaults

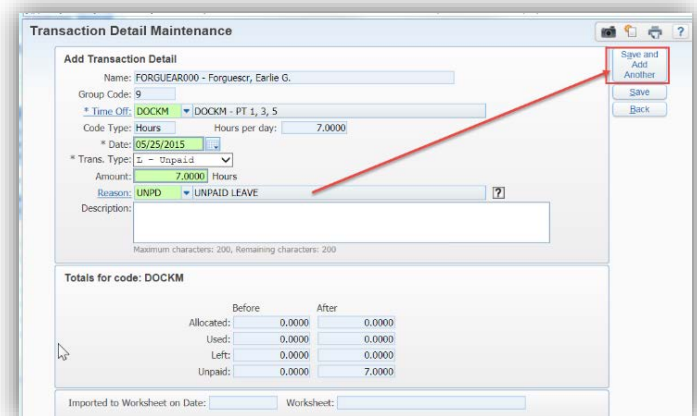
- Click **Save** once you have chosen your parameters, then **Select**, → **Save and Print**
- Click on **Display Report** (*report will come up*)
- Click **print** to print out the report

**Please check each month to make sure the earnings/hours are correct for each employee, that the new hires are set up and that the terminated employees are not showing up on the report.**

**Step 4: Entering Leave without Pay (LWOP)**

- a. Enter the appropriate codes:
  - i. **Time Off (DOCK/DOCKM)**
  - ii. **Date Leave Used**
  - iii. **Trans Type (L-Unpaid)**
  - iv. **Hours Used**
  - v. **Reason Code** –(Tab through the description to autofill text.)
- b. Select 'Save'

**Note:** The Pay Code for the LWOP employees is **DOCKM** (Mid-month) or **DOCK** (End of Month).



## Chapter 3. Time-Off Transaction and Reason Codes

---

### Bereavement

The BEREAVEMENT <BEREV> Time Code is used to pay a person when they Bereavement Leave.

Per School Board Policy:

*"Full-time employees who have completed the six (6) months (97 days for teachers) probationary period in their appointed position will be credited with three (3) days' paid bereavement leave on a fiscal year basis in the event of a death in their immediate family. If the destination of the funeral is more than 250 miles away, an additional two (2) days may be added for bereavement leave. **Immediate family is defined as a spouse, parent, sibling, child, grandchild or their in-law or step relative counterparts.**"*

*"Bereavement leave is not cumulative. Employees will not be paid bereavement leave for days not scheduled to work. Employees are required to attach a copy of the obituary or other satisfactory document to the leave request form. Bereavement leave ordinarily is to be used within 20 workdays of the death of a family member, unless the employee documents a legitimate reason to extend this period."*

- Time off Code:** BEREAVEMENT <BEREV>
- Reason Code:** BEREAVEMENT <BEREV>
- Description:** Tab through to autofill the reason code.
- Documentation:**
- 1) Leave Slip and
  - 2) One of the following
    - a) Obituary
    - b) Program from the service
    - c) Letter from funeral home
- Submit to Enrollment Services*

### Jury Duty

- Time off Code:** JURY DUTY <JURY>
- Reason Code:** JURY DUTY <JURY>
- Description:** Tab through to autofill the reason code
- Documentation:**
- 1) Leave Slip and
  - 2) Letter from the courthouse stating dates and times you were at jury duty
- Submit to Enrollment Services*

### Military Leave

**Time off Code:** MILITARY LEAVE <MILLV>  
**Reason Code:** MILITARY LEAVE <MILLV>  
**Description:** Tab through to autofill the reason code

**Documentation:** 1) Leave Slip and  
*Submit to* 2) Deployment Orders\*

*Enrollment Services*

*\*If the requested leave is greater than 17 days then contact Enrollment Services for additional requirements.*

### Temp Duty

Generally refers to conferences and workshops attended by staff and teachers. It is primarily tracked for **DOE** reporting purposes and to pay Subs appropriately.

**Time off Code:** TEMP DUTY <TEMP>  
**Reason Code:** TEMPORARY DUTY <TEMP>  
**Description:** Tab through to autofill the reason code

**Documentation:** **Keep documentation @ Site.**

Do **NOT** submit enrollment services.

*\*Temp Duty does not count against Leave.*

### Workers Comp

**Time off Code:** WORKERS COMP <WCOMP>  
**Reason Code:** WORKERS COMP USED <WCOMP>  
**Description:** Tab through to autofill the reason code

**Documentation:** 1) Leave Slip and  
*Submit to* 2) Work Approval Form from Risk Mgmt.

*Enrollment Services*

### Annual Leave

**Time off Code:** ANNUAL <ANNUAL>  
**Reason Code:** ANNUAL LEAVE<ANNUAL>  
**Description:** Tab through to autofill the reason code  
**Documentation:** 1) Leave Slip

*Submit to  
Enrollment Services*

### Sick Leave

There is no limit on the number of sick leave days that a person may accrue.

A Sick Leave Time off transaction is entered differently for Employees in Pay Type 09 (School and District Administrators) and all others.

Except for Pay Type 09 (School and District Administrators) all other employees will have Sick Leave entered under the Time off Code SICK LEAVE. Employees under Pay Type 09 are eligible for Sick Leave Pools and time off is entered under the lowest numbered pool if available.

### Pay Type 09

#### School and District Administrators

- 1) Employees in Pay Type 09 can accrue 96 hours max of Sick Leave per year.
- 2) Employees in Pay Type 09 are eligible for Sick Leave Pools.
- 3) Sick Leave is deducted from the oldest pool first.
- 4) The current year's balance of Sick Leave is contained under the Time off Code: SICK LEAVE <SICK>. At the end of the year the Sick Leave Balance is transferred to a Pool.

**Time off Code:** SICK LEAVE <SICK> or Lowest POOL# <PL#>  
**Reason Code:** SICK LEAVE <SICK>  
**Description:** Tab through to autofill the reason code  
**Documentation:** 1) Leave Slip

*Submit to  
Enrollment Services*

### Sick Leave (Personal Charged to Sick)

Each eligible employee can use up to 6 Sick Leave days for personal use per year. To indicate Personal Charged to Sick Leave days select the appropriate Time off Code, SICK or the lowest Pool and the Reason Code

**Time off Code:** SICK LEAVE <SICK> or Lowest POOL# <PL#>

**Reason Code:** PCS <PRSN>

**Description:** Tab through to autofill the reason code

**Documentation:** 1) Leave Slip

*Submit to  
Enrollment Services*

### Sick Leave (Emergency)

**Time off Code:** SICK LEAVE <SICK> or Lowest POOL# <PL#>

**Reason Code:** EMERGENCY <EMGR>

**Description:** Tab through to autofill the reason code

**Documentation:** 1) Leave Slip

*Submit to  
Enrollment Services*

*\*Employees can use a **total** of **6** days for both PCS and Emergency (Emergency - Limit **2**)*

---

*This concludes this Tutorial.*

---