Absence Management District Administrator Guide

Frontline Absence Management Solution





A Kelly® Education Company

Frontline Education's Absence Management Solution Reference Guide for District Administrators

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Frontline Education's Absence Management Solution Reference Guide for Administrators

Welcome!

Teachers On Call, Kelly Education Company® is pleased to present Frontline Education's Absence Management Solution. Absence Management has many features that allow you to efficiently manage your employees' absences and substitute requests. For your convenience, the system is available 24 hours a day, 7 days a week. This guide details the Frontline Absence Management functionality for school district administrators partnering with Teachers On Call. Please note that administrator permissions can vary based on the requirements of each school district and you may not have access to all features outlined in this guide.

Guide Content

In this guide you will learn how to:

- Access the system
- Enter an absence
- Modify an absence
- Cancel an absence
- Place an Absence on Hold
- Use Substitute Report Time
- View the Daily Report
- View and Use Absence Management Standard Reporting
- Utilize Report Writer for Special Reporting
- Reset Your Password
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- Add new Campus Users
- Approving Absences and set up Absence Approval
- Use and set up Accounting Codes
- Accessing the System via IVR Feature
- Frontline Mobile App

A: Accessing the System

Step 1: Log on to the Frontline website: <u>https://app.frontlineeducation.com.</u>

Step 2: Enter your Frontline ID and Password in the appropriate fields. If you have not yet created your Frontline ID and password, please look for a separate email from <u>no-reply@frontlineed.com</u> to create your account.

Step 3: Click Sign In. This will take you to your Absence Management home page.

B: Absence Management Home Page

Home Page

- On your home page there is an Alerts Menu (A), Help box (B), the Interactive Calendar (C), and the absence management Side Navigation (D). (See screenshot below)
- The Alerts Menu may contain important notes from your School District or from Teachers On Call.
- The **Help Box** contains information on who to contact in your district office and a link to Frontline Support resources.
- The Interactive Calendar will display the days your school is closed. If the calendar requires updates, please contact your District Administrator or Teachers On Call. Scroll to another month by clicking on the right/left arrows in the upper corners of the calendar.
- The **Side Navigation** shows the functions available to you, which are listed on the left side of the home page (e.g., Create Absence, Daily Report).
- The **Search Bar** at the top of the home page is dynamic, allowing you to search for Absence Confirmation numbers, employee names/emails/phone numbers, and school names.



C: Entering an Absence

As an administrator, you can enter absences for your employees. To enter an absence, you will need the employee's name, the absence start and end dates, the reason for the absence, and the absence start and end times. The default start and end times were collected during your school district's system set up.

Step 1: Click Create Absence on the top bar on the home page. Or click on the Absence side navigation tab and go to Create Absence.

Step 2: Select the first letter of your employee's last name or enter the first few letters of the last name in the space provided.

Step 3: Select an employee by clicking the employee's name. Then click on Fill Out Details.

There are **Day** and **Variation** view options for creating absences – click the Day/Variation buttons at the top of the next screen to switch between views. The system will remember your preference and default to your preferred view for future absences.

Variation View: Allows you to select one or multiple days from an interactive calendar. Best for single day absences and consecutive day absences.

	se se	lect a	t lea	st on	e dat	e at Ap	pple Elem			L
elec From	t the d	lay(s) j	you wi	II be o To	ut:		Absence Reason	Select One	٣	
Select Start M -		ect Start M - Select End		m - Select End m						
					Time Discourse and a second	Full Day	٣			
<		N	lay 20	20		>	HEMM AM format.	08:00 AM	04:00 PM	
SU	MO	τυ	WE	TH	FR	SA				
26	27	28	29	30	1	2	Accounting Code	Select One	*	
з	4	5	6	7	8	9				
10	11	12	13	14	15	16				
17	18	19	20	21	22	23				
24	25	26	27	28	29	30				

Day View: Allows you to enter a start and end date range for one or multiple days, with check box options to choose which days of the week are included in multiple day absences. Best for non-consecutive multiple day absences.

Step 2: Fil	l out Absence Details for	Brown, Deborah		View by Day	Variation	
Viewing	Add Days to Ab	sence				×
	Start Date	End Date	Su M Tu W Th I	F Sa		
	School Apple Elem		Absence Type Full Day	Start Time	End Time	
Notes 8	Absence Reason					
Notest	Select One	*				- 1
(Viewable	Accounting Code					
	Select One	*				- 1
						- 1
						-
_				Cancel	Add Day(s)	
						_

Step 4: Enter the absence information as follows:

• Length of Absence – Enter the Start and End Dates. In **Variation View**, you can also click the calendar icon to select the start and end dates. To create an absence for multiple days, you can click your mouse over the first day and drag your mouse to the final day of the absence, or manually click each day for non-consecutive day absences. By default, the system will display the next available absence date.

Note: Please be aware if you are creating past absences within the system to mark the Substitute Required option as "No" or assign the appropriate substitute that filled the assignment.

- School if you have district access to the system, select a school or all schools
- Absence Reason Select the absence reason from the drop-down list
- Absence Type Select the type of absence (Full Day, Half Day AM, Half Day PM, Custom)
- Start Time To customize, select the employee's absence start time
- End Time To customize, select the employee's absence end time

Step 5: You can add notes for the substitute such as the location of the lesson plan or specific classroom instructions. The notes can be read by anyone (e.g., substitutes, employees, and Teachers On Call) who views the absence. *In cases where permissions allow, you will be able to also see the Admin-Only Notes box as well as the Notes to Administrator box.

Step 6: *(Optional) To attach a document to the absence, click the Choose a File button and select the document you wish to upload.

File Attachments			
	Uploaded Files	Related Files	
DRAG AND DROP FILES HERE Choose a file	No Uploaded Files	No Related Files	
Previous Step: <a>Select Empl	oyee		Next Step: 🗸 Review & Confirm

Note: Documents attached to an absence can be in doc, docx, pdf, xls, or xlsx format and no larger than 600KB. An absence can have more than one attachment linked to it. An attachment will be deleted from an absence after 10 days of the assignment completion.

Step 7: Click Review & Confirm when all required absence information is provided.

Step 8: If all information is correct, you can click on Create Absence or Create Absence and Assign Sub (see additional notes below regarding the Assign Sub option).

Once saved, the system will assign a unique confirmation number to the absence. You may want to record this number to review absence history details (e.g., current status, time the absence was created, the substitute's name if the absence is filled or closed) at a later date. The confirmation number can also be retrieved from the Daily Report or Absentee Report. If a substitute is needed, the system will begin finding a substitute for the absence.

Absence Summary for Murp	Your Absenc Your confirm hy, Jack Print this Page	e has been s ation number is 18	scheduled. 19585794.
Substitute Required Notes to Administrator	Yes None		Next Steps View Absence Assign Sub to this Position View Profile for Murphy, Jack Create another Absence
School Absence Reason Start/End Times	Jones Elementary School Sick Full Day (7:30 AM-3:30 PM)		Logout of Aesop

Assigning Prearranged Substitutes (if applicable)

Note: Only assign a substitute to an absence if you have already spoken with the substitute and arranged for the coverage. When a substitute is manually assigned, they are not notified by the system, so it is imperative they are directly contacted.

Step 1: Click Create Absence and Assign Sub.

Step 2: Type the first letter of the substitute's last name in the **Search for Substitute** box or scroll down to see available and qualified substitutes.

Step 3: Locate the substitute's name you wish to assign. Click Assign.

Step 4: The system will ask you to confirm that you have already communicated the position with the substitute you are about to assign. Click **Assign** again if you have confirmed with the substitute.

The system will save the absence and give you a confirmation number. The confirmation number ensures that you completed the process correctly and can later be used to retrieve the absence details.

Utilizing Substitute Report Time

As a Campus User, you have the ability to adjust the sub's report time. This may be necessary in the following situations:

- If a sub is not required to be at the school for the full duration of the employee's absence.

- If an employee will be gone for less than 4 hours but a substitute is needed, the sub's time can be adjusted to 4 hour since they receive the 4-hour minimum.

- If a substitute arrives late (is tardy) to their position --- please also notify Teachers On Call so that we can document this in the sub's attendance file.

- If a sub leaves early from the position/you do not need them to stay for the remainder of the day.

Step 1: Once clicking into the absence, click 'Edit'. Then you will see the chain link (circled in red below), click the chain link.

Create Absence	Create Absence 0 Scheduled Absences 1 Past Absence					ate Absence 0 Scheduled Absences 1 Past Absences 0 Denied Absences					
March 27		Ν	ieed more options? Advanced Mode								
Image: Name of a large state st	Substitute Required Absence Reason Time Please enter a valid time range using the HH:MIM AM format. Full Day 07:00 AM to 03:30 PM Budget Code Notes to Administrator (not viewable by Substitute)	Yes Vacation • Substitute Report Time Please enter a valid time range using the HH:MM AM format. Half Day AM 07:00 AM to 11:00 AM None Selected •	FILE ATTACHMENTS								
	255 character(s) left	255 character(s) left	e & Assign Sub 🗸 Create Absence								

Step 2: You will then see the chain link has 'opened', allowing you to change the sub's report time without changing the employee's time. Once you have adjusted the sub report time as needed click Save.

Key Things to Remember when Using the 'Substitute Report Time' Feature:

- 1. Teacher Employees:
 - a. If you need to be gone for less than 4 hours, set the substitute report time to a half day (4 hours).
 - b. If you need to be gone for any time over 4 hours, please set the Substitute Report Time to a full day.
- 2. Paraprofessional/Aide Employees:
 - a. If you need to be gone for less than 4 hours, set the Substitute Report Time to a half day (4 hours).
 - b. If you need to be gone for any time over 4 hours, Substitute Report Time should match your hours. Substitute paraprofessionals are in quarter hour increments after the 4 hour mark.

D: Modifying an Absence

Step 1: Click on the **Quick Actions** box on the home page and input the confirmation # to bring up a specific absence.

OR On the home page screen, the absences for the current date will display in four sections: **Total**, **Unfilled**, **Filled**, and **No Sub Required**. (By clicking on Total, it will bring them all up in a list format.) Absences currently on hold, in which a substitute is being considered, will display in the Unfilled section. You can select another date, school (if applicable), enter a confirmation number or filter by employee type.

Step 2: Click the confirmation number link to view details of specific absences. (For additional information on how to use this screen, please refer to the **Monitoring Absences** section at the end of this guide.)



A: Modify an Absence: Click "Edit Absence", update the desired information and click "Save"

- B: Cancel an Absence: Click "Delete" if you wish to cancel the absence.
- C: Assign a Substitute: Click "Assign Sub" if you have a prearranged sub to place on the absence.

There are **Day** and **Variation** view options for modifying absences – click the Day/Variation buttons at the top of the next screen to switch between views. The system will remember your preference and default to your preferred view for future absences.

Placing an Absence on Hold

In the event that Teachers On Call was unable to place a substitute in an open assignment at your building for the day, and you've arranged internal coverage, the best course of action will be for you to place the assignment in a 'Hold Indefinitely' status.

What this does, is indicates to Teachers On Call staff that you have arranged internal coverage, and are no longer in need of assistance with finding a sub for that assignment, while removing the assignment from the substitutes' visibility. It also leaves the position as 'Unfilled', which helps to ensure all reporting done by Teachers On Call accurately reflects filled and unfilled assignments at each building.

In the event you are no longer in need of sub coverage from Teachers On Call for any given same-day assignment, please take the following steps.

- 1. From your home screen, click on the confirmation number of the absence that you'd like to place on hold.
- 2. Click the 'Edit Absence' button within the absence you're updating

3. From the editing screen, under the 'Absence Summary' section on the bottom, right hand side of the assignment you're updating, select 'Hold Indefinitely' from the 'Hold Until' drop down box

Select From	t the d	lay(s)	you wi	II be o To	ut:		Absence Reason	VACATION	Status: Unfilled
11/0	5/2018	3 🗰	-	11/05	/2018	Ê	Time Please enter a valid time range using	Substitute Report Time Please enter a valid time range using	Create another Absence for this Employee
<		Nov	embei	2018		>	the HH:MM AM format.		
SU	MO	TU	WE	TH	FR	SA	10:55 AM to 01:00 PM	10:55 AM to 01:00 PM	Approval Status: Approved
4	29 5	30 6	31 7	1	2 9	3 10	Accounting Code	Select One	Approvals Received: 1/1 Last Approval Action: 9/7/2018 7:25
11	12	13	14	15	16	17			AM
18	19	20	21	22	23	24			ABSENCE SUMMARY
25	20	21	20	29	50	1			Substitute Demuined
+ Note	Add es & A	New Attac	Varia hmer	ation Its				*	Subsettüte Required Ves Hold Until No Hold

4. Save the Absence

***Note:** Any assignments that have passed will not have the option to be 'Held'. Please utilize the 'Hold' feature for same-day absences where internal coverage has been arranged if you no longer wish for TOC to search for coverage. You can also contact the Talent Services team at 800.713.4439, option 1 – we can help place an assignment on hold too.

E: Splitting an Absence

You can use the "Split Absence" feature to break a multi-day absence into separate absences. A typical use for this would be to break an absence into multiple absences so different substitutes can fill the individual days.

Pull up the Absence needing to be split by clicking on the confirmation number from the dashboard view or searching by confirmation number. Once you're in the "Absence Details" page, click Split Absence.

Absence	Absence Log	Approvers		Approver Log	Available Subs	s		
Edit Absence	Split Absence	Reconcile						
September 23 - September 27 at Apple Elementary School 0 out of 5 Days Reconciled								

This will open a new page where you can select the day(s) you would like to split. Check the boxes next to the days you would like to break off as a separate absence. If you want to split off one day as a separate absence, simply click the box beside that day. If you would like to break off multiple days, check all boxes that apply. Then, click Create Split Absence.

	Absence Splitting	Absence Log	Approvers	Approver Log	Available Subs		
• Sp	olit Individual Da	Cancel	✓ Create Split Absence				
	Date		Duration	Location			
	Monday, Sept	ember 23, 2019		Apple Elementary School			
	Tuesday, Sep	tember 24, 2019		Apple Elementary School			
	Wednesday, S	September 25, 2019		Apple Elementary School			
	Thursday, Sej	otember 26, 2019		Apple Elementary School			
•	Friday, Septe	mber 27, 2019		Apple Elementary School			
						Cancel	✓ Create Split Absence
				Approve	Absence Split		

A pop-up window will appear, asking you to confirm
splitting the absence. To proceed, click Save Split
Absence. To cancel and keep the absence as-is, click
Cancel.

Date	
Wednesday, September 25, 2	019
Thursday, September 26, 201	9
Friday, September 27, 2019	

Once you have saved the split absences, you will be taken back to the "Absence Details" page. You will see a small pop-up box in the top right corner of your screen letting you know that the split was successful. It will also have the confirmation number for the new split absence.

To be taken to the split absence, click on the confirmation number. To dismiss the message, click the small X at the top right corner of the message.

The new absence will carry over the attributes of the absence it was split from. This means things like the approval status, file attachments, budget and accounting codes, and even the substitute if one was already assigned will be the same as they were in the original absence. Don't forget to edit these details in the new absence if needed.



F: Cancelling an Absence

If you would like to cancel the absence, you can do this on the "Absence Details" page as well. The Delete button will show whether you are in edit mode or not. Simply click the button to delete the absence. If the button doesn't appear please contact Teachers On Call for assistance.

You will be asked to confirm your decision. Click the Yes button to confirm and delete.

Confirm		
Are you sure you want to dele	ete Vacancy #37	7924544?
	Cancel	Delete

× Dele	ete
NEXT STEPS	^
Status: Unfilled Assign Sub	
Create another vacancy for this vacancy profile	

G: Removing a Substitute from an Absence

If plans change for an assigned substitute, you can easily remove that substitute from the absence.

Step 1: Find the absence you want to remove the substitute from. You can do this with your absence management dashboard by clicking on the "filled" option.

Summary	for: 09/16/2019 🎁	K Today >	Absences	Vacancies		Qui	ck Actions	
All Schools		Schools * All Employee Type	e(s)	Employee Typ	Jes +	Q	Confirmation Number	Search 📀
Tota 3	Unfilled O [096]	Filled Rev 3 [100.0%]	o Sub quired		6 JLY ORT	CI A	pprove	Create Vacancy Reconcile
3 Fill	ed	\$ School \$	Reason	n +	Shift	*	Substitute	Created \$
376639375 Absence ← 🗂 →	Cavell, Laura	Apple Elementary School	lliness		٠	~	Debra Mackey	9/11/2019 12:46 PM
376869861 Absence □ →	Jones, Amanda Grade 3	Apple Elementary School	lliness		٠	~	William Abrams	9/12/2019 11:06 AM
376870037	Locke, John Employee	Apple Elementary School	Person	al		NA.	Chrsti Augsta	9/12/2019

Step 2: From the "Absence Details" page, click the Remove Sub button on the right side of the screen.

A pop-up window will appear where you can record who requested the removal. There are a couple other options you have here as well.

NEXT STEPS	^				
Status: Filled by William Abrams 🔤					
★ Remove Sub					

Allow substitute to see job after removal -

Leave this box unchecked if you don't want this job to show up to the substitute as an available job after they have been removed. **Requested By** - Choose who requested that the substitute be removed or if the substitute was a no-show. Absence management will record this information.

Step 3: Once you have made your selections, click the red Remove Sub button.

If the job is still in the future, absence management will begin to attempt to fill the job again with qualified and available substitutes.

Remove Substitute	from #376869	861
Abrams, William		Assigned
Allow substitute to see	job after removal	
Requested By:	Administrator	٣
	Cancel	X Remove Sub

H: Viewing and Modifying Preferred Substitutes

As a district administrator, you can view all of your buildings' lists of preferred substitutes and add/remove substitutes to the list.

Step 1: Click on Master Data > Schools > Preferred Substitutes.

Step 2: Select the building, then you will see the Preferred Substitutes screen under that school: **Step 3**: To add a substitute to one of your school's Preferred list, click on Add Substitute(s).



Step 4: Search for and select the substitute, check the "On List" box next to their name, then click **Apply Changes** to add them to the Preferred Substitutes list.

To remove a substitute from the Preferred Substitute list, click **Edit**, uncheck the "On List" box next to the substitute's name, then click **Apply Changes**.

O View Exclu O View Inclu	des des				Ed	it Apply	Changes	Cancel	
				% Lea Vis	id Time iible	Mini	mum Visi	bility	
On List Sul All None	bstitute	Exclude	Exclusion Comments	Default	Override	Default	# Hours	# Minutes	De
	<u>ne,</u> nael r☆☆☆			 <u>95%</u>		<u>120h</u> <u>0m</u>			<u>12</u> 0h
					Ed	it Apply	Changes	Cancel	

Note: While you are also able to view the overall District "Preferred list", this list is maintained by Teachers On Call and is all of the substitutes available to accept jobs in your district. Please do <u>not</u> make any changes to the list under your District's preferred list tab.

I: Viewing the Daily Report

The Daily Report allows you to view details of the employees' absences. It provides valuable information, including employee names, absence date(s), and the substitutes who are assigned to your school. In addition, district administrators can select a specific school or view the Daily Report for the entire district. **Step 1:** Click on **Daily Report** from your top bar menu or from your sidebar menu, click **Reports** >

Absence > Daily Report. This will automatically bring up the absence information for the current date. Step 2: Enter the date for which you want to view the Daily Report. You can also specify the type of employee (e.g., teacher, librarian) to be included in the report. If a school administrator oversees one school, the report will be sorted by employee name by default. District administrators may sort the report by school or by employee name.

Step 3: The five sections of the report will automatically show on the lower half of the page, or click **Search** to select the specified sections.

Step 4: Click **Print** to be able to print off the Daily Report for today's date, or the date that was specified in the search.

The information is sorted into five sections:

- Unfilled Absences the system is attempting to fill for that date, or that are currently being held for a substitute.
- Filled Absences filled with a substitute for that date.
- No Sub Required Absences created in the system but do not require a substitute for that date.
- Canceled Absences that have been entered, not filled, and closed unfilled. A substitute is no longer required for that date.
- Closed Absences that were entered and filled with a substitute then closed. Another substitute is
 no longer required for that date.

*You also have the option to filter each section by Conf#, Employee Name, School, Absence Reason, Shift, and when it was created. Simply click on the up and down arrow to filter.

ABIENCE REPORTS		Renar amagine Charge.
Carly Report Wednesday, Deter	-eer 9, 2015	
Dete TOTIONS D 4 rake	2 R Annual R Statutes and MR	
juma Hersenary School (1999)	- Mitightyn Spin. Berginen Spin	an Breath Lindon Las
Rosers Arrest		
Summary		-
	Totals Virginality, December 1 Total 2 Fill Aster 50.0%	Realing the Report The Stranding Cont to Stranding Cont Stranding Cont Str
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In cases in such that	Josephered Street States	erent e Alderia 1970an
b .		
0 No. Sale Required		
cutt 1 mme	* shed	I Reason I shaft created I
There are no	substitute not required Absences	e Vacancies for this date
A		
U Carcanat		
Curl # 1 Pane	 School 	B Raccos B Staff Counted B
There	are no cancelled absences or vaca	ules for this date
Count		
Cord # + Home	# Isheet	Fiscon F Delt Outed F
1		

Daily Report Sample

J: Absence Management Standard Reports

Absence Related:

• Absence Approval Status: The Absence Approval Status report allows you to view absences that require approval for a specific date range and their current status.

- Absentee Report: The Absentee Report allows you to view a complete listing of all absences for a specific employee or all employees, and for a specific date or range of dates. This report allows you to:
 - View employees' absence history
 - Specify an individual employee or all employees
 - Sort the report by either date or employee name
- **Unfilled Absences:** The Unfilled Absences report allows you to view all unfilled absences in a selected date range and filter by location, type (absences or vacancies), employee name and vacancy profile name.
- Absence Monthly Summary: The Absence Summary Report allows you to view weekly and monthly absence statistics one month at a time.
- Absence Advance Notice: The Absence Advance Notice report breaks down how far in advance absences are being created and how quickly they are being filled.
- Absence Call History
- Day of Week Absence Analysis: The Day of Week Absence Analysis allows you to see the daily and weekly totals for absence reasons for a specific day or week. The date range can span up to 92 days for a specific school and/or district, or up to 365 days for a specific employee.
- Absence Reason Percentages
- Absence Reasons by School
- Absence Feedback
- Absence Interactive: The Absence Interactive Report allows you to access historical absence data quickly and easily. The report allows you to do the following:
 - Choose the date range for absence information
 - Choose the absence reasons and employee types Along with customizing the grouping and detail of the data
 - Download the report into an Excel spreadsheet
- **Cancelled/Closed Absences:** The Cancelled/Closed Absences report allows you to view absences that were deleted (purposefully or accidentally).
- **Substitute Sign In:** The Substitute Sign In report allows you to print out a report for substitutes to sign in. Campus Users also have access to this report for their building
- Perfect Attendance Report:

NAVIGATION	¢			
Web Naviga	ator	Absence	>	Daily Report
		Employee	>	Absence Approval Status
Daily Report	rt	Substitute	>	Absence Reconciliation
品 Master Dat	a >	Recording Instructions	>	Absentee Report
i Absences	>	Report Writer		Unfilled Absences
	Data	Scheduled Reports		Absence Monthly Summary
: Kelefence i	Jala y	Letter Writer		Absence Advance Notice
A Security	>			Absence Call History
Lill Reports	>			Day of Week Absence Analysis
Extract / Im	iport >			Absence Reason Percentages
Corrigons				Absence Reasons By School
ces settings	,			Absence Feedback
Institute Re	eport			Absence Interactive
😂 Resource L	ibrarv >			Cancelled/Closed Absences
	,			Substitute Sign In
				Perfect Attendance Report

Employee Related:

- **Staff List:** The Staff List allows you to view a listing of your school's employees. The Staff List includes the following information:
 - Employee Name and Title
 - Telephone Number (Frontline ID)
 - o PIN

- Employee Status (active/inactive). Employees who are not active do not have access to the system. To change the status of an employee, please contact your District Office or Teachers On Call.
- Whether the employee requires a substitute
- Employees who have their names recorded on the Interactive Voice Response (IVR). The voice recording allows substitutes to hear the name of the employee that is absent when using the IVR.
- Absence Reason Balances
- Absence Reason Balances Details
- Fulfillment Skills
- Multi-School Employees
- Multi-School Vacancy Profiles

NAVIGATION	¢			
Web Navigator		Absence	>	Staff List
C new new gater		Employee	>	Absence Reason Balances
😑 Daily Report		Substitute	>	Absence Reason Balances Deta
品 Master Data	>	Recording Instructions	>	Fulfillment Skills
🛗 Absences	>	Report Writer		Multi-School Employees
😑 Reference Data	>	Scheduled Reports		Multi-School Vacancy Profiles
A Socurity		Letter Writer		
[] Security	/			
Lill Reports	>			
C Extract / Import	>			
ⓒ Settings	>			
📶 Institute Report				
🛱 Resource Library	>			

O: Report Writer

The following reports will be available standard for you to run as needed: Absence Interactive, Daily Report, Employee Data Report, Absence Balance Report (if applicable), and School Info Report. To see all available reports, you may need to change the **Show reports last run or created** filter to "any time" and then click **Search**.

Step 1: Click Run with New Filters next to the desired report

Step 2: Update any filters if necessary - Click "Run"

Step 3: Choose output type ("Excel Compatible, .csv" recommended, except for Daily Report. HTML is recommended for Daily Report due to grouping)

Step 4: If you'd like the report emailed to you enter your email address and click checkbox for "Attach results to email" – Click "Run"

Step 5: Download results or open results from your email.

Step 6: Any Public Reports that are scheduled for Payroll purposes or other specific reporting needs can be found under Report Writer as well. Simply click on "Run with Saved Filters" or "Run with New Filters" to adjust dates etc.

Report Writer						
Show reports last run or created any time		Name:				
Q Search						
Absence Data						
Name	Access	Created	Last Run	Runs	Actions	
Absence Interactive	Public	5/24/2018 2:30 PM by: Carrie Nester		0	Run with New Filters	
					Run with Saved Filters	
Daily Report	Public	5/24/2018 2:05 PM		0	Run with New Filters	
		by: Carrie Nester			Run with Saved Filters	
Employee Information						
Employee mornation						
Name	Access	Created	Last Run	Runs	Actions	
Employee Data Report	Public	5/24/2018 1:56 PM		0	Run with New Filters	
		by. come nester			Run with Saved Filters	
Absence Reason Balance						
Name	Access	Created	Last Run	Runs	Actions	
Absence Balance Report	Public	5/24/2018 2:02 PM		0	Run with New Filters	
		by: Carrie Nester			Run with Saved Filters	
School Information						
Name	Access	Created	Last Run	Runs	Actions	
School Info Report	Public	5/24/2018 2:09 PM		0	Run with New Filters	
		uy. Carrie Nester			Run with Saved Filters	

P: Resetting your Password

Follow the steps below to update your Frontline password:

- **Step 1:** Click on the greeting drop down menu and then click on Logout.
- Step 2: Click on the I forgot my Password link.
- Step 3: Enter your Frontline username on the next screen, then click Continue.
- Step 4: The system will send you an email with a link you can click to reset your password.



Q: Setting up a New Employee

Employees can be added either individually or through a Data Import.

Adding an Employee Individually

From the side navigation bar, select Master Data > Employee > Add. Then fill in the employee's profile – general information, permissions, and configuration settings.

Master Data > Empl	oyee > Ac	id		
NAVIGATION	G	Organization Informatio	on Alt+0>	Add and
🐵 Web Navigator	>	School Alt + I	>	General Information
× Master Data	>	Employee Alt + W	>	Address
🛗 Absences	>	Vacancy Profile	>	Permission
≔ Reference Data	>	Substitute Alt + S	>	Skills Absence History
Security	>			Preferred Substitutes
I Reports	>			Qualified Substitutes
				Communications to Employee
Extract / Import	>			Absence Reasons

General Information tab: Fill out all required fields (marked with an asterisk) plus the employee's title and email address. Absence times only need to be included if the employee's hours differ from the building default hours.

General Information	Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Absence Approvers	Reports		
Employee General	Employee General Address							
Select Another Emp	oloyee <u>Crea</u> e a Substitut	te an Absence <u>Add E</u> e	imployee 🗐 Sen	d Letter/Email				
<u>Indice entry entry of e</u>		-		Employee: 77C73rn	iak Stenhanie			
				General Info	ormation			
				Last Update: 7/29/20 Log in as	20 11:18:33 AM 5 User			
		Log	in to Time and	Attendance as Use	er Time and Atte	endance Settings		
			F	ields marked with an ast	terisk * are required.			
First Name		Middle Name				Last Name		Access Granted 🥝
* Stephanie						* zzCzarniak		<i></i>
Identifier		Employee Types						
*								
Testemployee		* Teacher						
Title		E-Mail						
Kindergarten Teac	har	stephania cz	amiak@teachere	anoall.				
School(s)	lici	stephanie.cz	annak@teachersi	uncair.)				
* Houston Elementary								
nousion clementary	1							
		Gender				Room		
						Main Office		
Start Date		End Date				Birth Date		
User Access								
Manage user's acc	ess							
Phone Login Info	ormation							
The Phone Number	r. Alternate G	bone Login ID and PI	N below will only	he used as login cre	dentials for users to	sign into the phone	system, not the v	web application. Learn More
	iy racernater i	none cogin to and th	Alternat	e Phone Login ID		sign mes the phone	System, not the t	co application <u>court note</u>
Phone Number		Phone Pin	(8,9,11-	20 characters)				
* 5073813068		* 19746 <u>Change</u>	e Pin					
Absence Times	2							
Absence Start Time		Absence Half	Day Break (1st Half	End/2nd Half Start)	Absence	End Time	Absence H	iours Per Day
								0verride
Substitute Repor	t Times 🗐							
Substitute Report Sta	rt Time	Substitute Re	port Half Day Break	(1st Half End/2nd Half	Start) Substitut	e Report End Time		
Custom Absence	s Only 塱							
Relative Substitute St	tart	Relative Sub	stitute End					
mins bet	fore 🗸		mins after 🛛 🗸					

- First Name: Employee's first name
- Last Name: Employee's last name
- Active: Confirm that this box is check, indicating that the employee is active.
 - In the event an employee should no longer be active with the District, this box can be unchecked, switching the employee's status to inactive but keeping employee data for record-keeping and reporting purposes.
- Identifier: This field is unique to each employee. If you are integrated with another payroll system and will need the systems to "talk" to each other, this should correlate to your payroll system (i.e. Skyward, Smart HR, eFinance, etc.)
- Employee Type: Choose the employee type for this individual.
- *Title*: This is the employee's specific title, which substitutes will see/hear in the Frontline system when accepting the position.
- *Email*: This is the employee's district email address and where the employee will receive an invitation email to create their login ID for accessing Absence Management
- School: This location is building the employee works in and also tells a substitute where to report. To select multiple schools, hold down the **Ctrl key** and choose additional schools from the list.
- Room: Determine a specific room where the substitute reports. We recommend you enter "Main Office" in this field, to have substitutes report to the office to check in first.
- Phone: Employees will use their phone number for login through the phone system only.
- *Pin*: An employee uses this number in conjunction with the login ID to log into Absence Management.
- Absence Times: Employee times can be entered separately for each employee. If no
 employee start, half day break, and end times are entered, the employee's hours will
 automatically generate as the building set hours. (Absence times only need to be included
 if the employee's hours differ from the building default hours.)
- Substitute Report Times: Sub hours can be designated separately from the employee hours.

Deduct Break Time from Absence Duration/Balances	Language	Budget Code
Default 🗸	None Selected	
Total Experience	School Experience	Accounting Code
		Special Education Elementary Para Sub
Name Recorded		
Yes		
Notes		Email Approval Status Updates

• Accounting Code: You can assign this employee an accounting code, so the code attaches to any absence they create (if applicable for your district).

Apply Changes once you are finished adding information to the General Information tab. Next you will adjust the employee permissions.

Permission tab:

General Information Permission Configuration Settings Absence Reasons	Preferred Substitutes	Absence Approvers	Reports		
Select Another Employee Create an Absence Add Employee () Send	Letter/Email				
	Employee: Jacobs Permissi	<u>son, Priscilla</u> ions			
Can Assign Substitute to Absence					-
Can Hold Absence Processing	* 0 Can Hold Ab	sence Till 'n' hours pri	ior to Absen	ce Start	
Can Upload Files					
✓ Can View Substitute Report Times					
Can Modify Substitute Report Times					
Grain when Absence is Filled Absence Cancellation					
Can NOT cancel Absences					
Can cancel UNFILLED Absences					
Can cancel FILLED or UNFILLED Absences					
Substitute Requirements					
Does not require a Substitute					
Always requires a Substitute					
Can decide if a Substitute is required					
Employee Preferred Substitutes List Preferred Substitutes List Default: Edit Pref. List(Basic)					
Use default setting					
Require comments when excluding substitutes Default to org setting V					
E	Edit Apply Change	s Cancel erisk * are required.			

- Can Assign Substitute to Absence: Allows the Employee to directly assign a substitute of their choosing when they create an absence. The employee should always prearrange and confirm with a substitute before assigning the sub in Aesop.
- Can Hold Absence Processing: Allows the employee to put an absence on hold after they create it (not recommended).
- Can Upload Files: Allows the employee to upload files to their absence, to include lesson plans for the substitute, electronically.
- Can View Substitute Report Times: Allows the employee to <u>view</u> the substitute report time, if different from their employee time.
- Can Modify Substitute Report Times: Allows the employee to <u>modify</u> the substitute report time, separate from their employee absence time.
- Absence Cancellation: Choose if you want the employee to be able to cancel an absence once it is created.
- Substitute Requirements: Does this employee require a substitute when they are absent? "Can Decide" will allow the employee to choose if a substitute is needed when they create the absence.
- Employee Preferred Substitute List: Recommend leaving this as the "Use default setting" to ensure consistency for all employees.

Apply Changes once you are finished adjusting permissions on the permission tabs. Next you will adjust the employee's configuration settings.

Configuration Settings tab:

Add New Skills														
Please type the first few letters. Search														
Edit Apply Changes Cancel														
	Should Have Should Have Should Have Should Have Fulfillment "% Lead Time "Short Lead Time "Long Lead Time Requirements Enforced" Boundary" Boundary Overrides Overrides Overrides						e ime							
Skill Description	# Substitutes with skill	Fulfillment Skill	Expires	Must Have	Should Have	Must Not Have	Default	%	Default	# Hours	# Mins	Default	# Days	# Hours
Paraprofessional	Z	>		۲	•	•	100%		0h 0m			120d 0h		
					Ed	lit Apply C	Changes Cancel							

 Select, Add New Skills, which will allow you to select the must have skill for the employee (teacher, para, etc.). To select the skill, check the box under the Fulfillment Skill column, make sure that the Must Have button is marked and click apply changes. This ensures that the correct qualified substitute will fulfill this employee's absences.

Apply Changes once you are finished adjusting skills on the configuration settings tab. Next you will send the employee invitation to create their frontline ID.

The final step will be to invite the employee to create their Frontline ID. Click on the **General Information** tab and select the Manage User's Access link – similar to the button highlighted in yellow, below.

First Name	Middle Name	Last Name	Access Granted 🥝
* Priscilla	J	*Jacobson	×.
Identifier	Employee Types		
* 47	*Paraprofessional		
Title	E-Mail		
ELEM SPED Para Educator	priscilla_jacobson@cps.k12.mn.us		
School(s)			
* Caledonia Elementary			
	Gender	Room	
		MAIN OFFICE	
Start Date	End Date	Birth Date	
User Access			
Manage user's access			

Then Select, Send Invitation.

No Account Send Invitation

Adding a Group of Employees through a Data Import

Using the import guide, you will complete the Employee Import Excel Document to upload in Absence Management (Aesop).

Employee Data Import Guide

This guide will walk through the available fields in the Employee Import Template and what they mean. The Import Template is broken down into colored sections based on what type of information you are trying to import. Any fields that are not needed for the employee's information, can be deleted for the import.

Color Key

Light Blue	Employee general info and permissions
Dark Blue	Required fields for importing new employees
Pink	Skill information
Green	Absence balance information
Orange	Preferred substitute information

Tips: 1) Every employee import will require the Identifier column so absence management knows which employee to make the changes to. 2) Before submitting your import, delete any columns that are not being used from the Excel template.

Import Template Guide

Identifier	District unique Id number. May be alphanumeric and up to 30 characters . We recommend an employee number that matches the employee's ID from your payroll/hr system. This field will be required in all data imports to identify the employee you want to update .
Last Name	Employee's last name. Up to 30 characters
First Name	Employee's first name. Up to 30 characters
Middle Name	Employee's middle name. Up to 10 characters
Title	Employee's specific title like "Second Grade" or "Nurse"
Phone	Employee's phone number. This will also be their Login ID. Don't use spaces or dashes Example: 5556867848
Pin	This will be the employee's PIN to login. Leave blank for new employees if you want the system to auto-assign a PIN. Must be 4 or 5 digits and only numeric
School External ID	The external ID of the school you want to assign the employee to. The external ID is a district assigned ID and can be found on the school's general information page. Don't use this field if you are using "Inst_ID" in your import
Inst_ID	The Web ID of the school you want to assign the employee to. The Web ID can be found on the school's general info page. Don't use this field if you are using "School External ID" in your import

Employee Type Description	The employee type you want to assign to the employee. Must match an employee type in Reference Data
Employee Pay Code External ID	Use this to import pay codes to the employee record.
Substitute Requirements	Does this employee require a substitute? O = Employee can decide if substitute is required N = Never requires a substitute Y = Always requires a substitute If you leave this field blank for new employees it will default to O
Room	Put "Main Office" in this field
Email	Employee's email address Example:employee@school.edu
Street 1	Employee's street address Example: 501 Trooper Rd.
Street 2	Address part 2 Example: Apt 1
City	The city in the employee's address
State	State code for the address Example: PA or OH
Zip	Zip code for the address Example: 19464 or 19464- 1245
External ID	Miscellaneous data field on the employee's general info page

External ID 2	Miscellaneous data field on the employee's general info page
External ID 3	Miscellaneous data field on the employee's general info page
Start Time	Employee's start time Example: 7:00 AM or 07:00
End Time	Employee's end time Example: 3:00 PM or 15:00
Half Day Break	This would be the end time of a Half Day AM absence Example: 11:00 AM or 11:00
Half Day Break 2	This would be the start time of a Half Day PM absence Example: 11:00 AM or 11:00
Sub Start Time	Start time for the substitute filling the absence Example: 7:45 AM or 07:45
Sub End Time	End time for the substitute filling the absence Example: 3:15 PM or 15:15
Sub Half Day Break	This would be the end time of a Half Day AM absence for the sub Example: 11:00 AM or 11:00
Sub Half Day Break 2	This would be the start time of a Half Day PM absence for the sub Example: 11:00 AM or 11:00
Remove Employee	Put a "Y" in this column to delete the employee from Aesop

Active	Put a "Y" in this column to mark the employee as active Put a "N" in this column to mark the employee as inactive Leaving this column blank for new employees will default to Y
Can Assign Substitute	Put a "Y" in this column to allow the employee to assign substitutes Put a "N" in this column to not allow the employee to assign
Can Cancel Absence	Put a 0 (zero) in this column to not allow the employee to cancel absences Put a 1 in this column to allow the employee to cancel only unfilled absences Put a 2 in this column to allow the employee to cancel both filled and unfilled absences
Can Upload Files	Put a "Y" in this column to allow the employee to upload files to absences Put a "N" in this column to not allow the employee to upload files to absences
Notes	Notes about the employee that will appear on their general info page. Character limit is 50
Accounting Code External ID	External ID of the accounting code you want to assign to the employee
Budget Code External ID	External ID of the Budget Code you want to assign to the employee
Birth Date	Employee's birth date Example: 5/25/1977 or 05/25/1977
Start Data	Employeels employment start data Every la 0/05/0000
Start Date	or 09/5/2008

End Date	Employee's employment end date Example: 2/10/2009 or 07/15/2007
Preferred Substitutes List Permission	Allow the employee to edit their preferred sub list 1 = Do not display list 2 = Display list only 3 = Edit list (basic) 4 = Edit list (adv.) 6 = Edit List (Basic) – No Exclude 7 = Edit List (Adv.) – No Exclude
Hours Per Day	Enter the number of hours the employee works per day Example: 8 for eight hours
Email Approval Updates	Do you want this employee to receive email updates of approval status? Y for Yes N for No
Email When Filled	Do you want this employee to receive email updates when their absence is filled by a substitute? Y for Yes N for No Leaving this field blank will default to Yes for new employees
Language Description	Default IVR language the employee hears on the phone. English Spanish French
Gender	M for Male F for Female
Ethnicity Description	Must match an ethnicity description in Reference Data
Skill Code	The Skill Code from Reference Data of the skill you want to assign to the employee
Skill Type	What type of skill? MH for Must Have SH for Should Have MNH for Must Not Have

Skill Expires	The date you want this skill to expire for the employee Format example: 2/10/2013 or 07/15/2012
Remove Skill	Put a Y in this column to remove the skill
Absence Reason External ID	The external ID from Reference Data of the absence reason you want to give the employee a balance for
Balance	The balance in days or hours (depending on the employee's settings) of the Absence Reason Example: 3 for 3 days or hours
As Of Date	The date you want the balance to begin being calculated Example: 9/1/2010 or 09/01/2010
Remove Absence Reason	Put a Y in this column to remove the absence reason
Substitute Identifier	The Identifier of the Substitute you want to add to the employee's preference list
Remove Substitute	To remove the substitute from the employee's preference list put a Y in the column
Exclude	To mark the sub as excluded from the employee's preference list put a Y in this column
Visibility Percent	Set the override visibility percentage for the substitute Example: put 90 for 90 percent
Favorite Rank	Set the favorite five rank for this substitute. You can choose from 1 to 5.

Importing the File into Absence Management

Extract / Import > Import Data

Browse and Upload File

From here choose the **Object Type** from the drop down menu and **Browse** your computer for the file you are going to import. This will be the import template you saved earlier.

Upload Files				
Object	Гуре	File		
Employee	•	sktop\Employee Import.xls Type:	Browse	
	Add File Next >]		

Preview Import

Before submitting the import you will have a chance to preview it and specify the way you want certain items imported.

At the top of the page you will see the name of the file you are importing, the number of records in the file, and an indication of which record is being displayed. You can scroll through the first five records by the black forward and back arrows.

	Preview Import	New Import Status Summary
File 1 of 1 Employee Import.xls Employee	File contains 5 record(s)	◆ Displaying Record 1 of 5 ▶

Below this you will see a list of the Source Fields with the data for the displayed record, the Target Fields, and the options for blank values and changing the field.

- **Source Field** This is the header from the data import template. Based on this header Aesop knows which field the data is being imported to.
- Target Field This is where the new data is being imported into the system.
- Blank Value Restores Default If you check this box then a blank field in the file will restore the target field to its default, clearing any existing data from the target field.
- Change this field By default this box will be checked. This means you want absence
 management to replace any existing info in the target field with this new information.

	Source Field		Target Field	Blank Value Restores Default	Change this field
Identify By:					
Identifier	4586458	\rightarrow	Identifier		
Data Fields:					
Identifier	4586458	\rightarrow	Identifier	13	1 X 1
LastName	Foster	\rightarrow	Last Name	10	192
FirstName	John	\rightarrow	First Name	10	1921
10			10 million and		

Configuring Import Options

Choose one of the three import options:

- Load all data that does not contain errors The system will go ahead and load all the data without errors and skip any data that does have errors
- Stop load if errors are identified If an error in the data is found during the upload, absence management will completely stop the import and no data will be updated.
- Validate Only: Do not update real data Absence management will check to see if there are
 errors in the file and no data will be changed in the system.

Click **Submit** when you are ready to run the import.

Import Status

Once you submit the import, you will be taken to the import status page. Here you will see the progress of your import as well as past imports. Refresh this page in your web browser to see an updated view.

Import Status									
	View imports from all users								
# # Submitted User Status Files Rows Error									
€ 439	12/15/2010 3:34 PM	Nav. Super User	Submitted	1	5	0	Cancel	Details	
	12/15/2010 3:33 PM	Nav. Super User	Completed	1	5	0		Details	
	12/15/2010 3:31 PM	Nav. Super User	Completed	1	5	2		Details	
			the second s		-				

If the import is still running you can cancel it by clicking the **Cancel** link. To view the import in more detail click the **Details** link.

Q: Setting up a New Campus User

Secretaries, Principals, and any other individuals at the building level that need access Absence Management to view absences or approve employee absences will be set up as campus users.

Security > Principal Web > Campus Users

To Add a new Campus User, click the link Add Campus User.

Add Campus User

Select a Campus User

Search

Please type the first few letters.

Name	Phone	Email	School Visiblity Profile	Login History
Caputo, Leila	(484) 555-1234	leila.caputo@victoria.edu	All Schools	View
Donlop, Ally	(484) 615-3574	ADonlop@victoria.edu	All Schools	View
Knight, Michael	(610) 485-6723	mknight@victoria.edu	All Schools	View
Perez, Juila	(610) 245-8795	jperez@victoria.edu	All Schools	View
Queen, Oliver	(484) 965-2317	oliver.queen@arrow.com	Ackbar	View

	14			÷.	P	P	
CREATE ABSENCE	CREATE VACANCY	ABSENCE MODIFY	DAILY REPORT	SCHOOL	FIND EMPLOYEE	FIND SUBSTITUTE	
General Informatio	on						
	Log	in to Time and	User: Gene Last Updati Back to Se Attendance	Smith, ral Info e: 5/19/20 g in as elect a C e as Use	Mickey mation 6 9:00:40 AM <u>User</u> ampus User 1 Time and	Attendance Sett	<u>ings</u>
First Name		Middle Name		Las	t Name		Access Granted 🥑
*				*			
Mickey				S	nith		
Title				Ide	ntifier		
				L			
Email				Pho	one Number		
mickey@tardis	.com			4	846298734		
Send Email							
for Approvals							
for Feedback	fication						
User Access							
Manage Login A	ccess for this Ad	dmin					
				_			
Permission Profile	iecione V	School V	Visibility Profile	1 	1	English	
[Fincipal Ferm		All S	CIUUIS	• ,		Ligion	
Employee Type Vis	ibility Profile	Approve	er Profile		Ad Blance		
All Staff	v /	All S	noois		• <u>New</u>		
Distribution Li	sts						
undefined	~						

- 1. First Name: Campus User's first name
- 2. Last Name: Campus User's last name
- 3. Access Granted: Confirm that this box is check, indicating that the campus user is granted access (active).
 - a. In the event an campus user should no longer be active with the District, this box can be unchecked, switching the user's status to not granted but keeping user data for record-keeping and reporting purposes.
- 4. Title: This is the campus user's specific title this field is optional.
- 5. Identifier: This field is optional.
- 6. *Email*: This is the campus user's district email address and where the campus user will receive an invitation email to create their login ID for accessing Absence Management

- 7. Phone Number: This field is optional.
- 8. Send Email: Choose what events the Campus User should receive email notifications for.
- 9. *Permission Profile*: Select the set of permissions that you want this Campus User to have.
- 10. *Employee Type Visibility Profile*: Select the profile for which employee type you want this Campus User to see.
- 11. *School Visibility Profile*: Select the profile for which schools you want this Campus User to see.
- 12. Approver Profile: Select which approver profile to assign to this Campus User (if applicable)
- 13. *Distribution Lists*: You can add or remove this Campus User from any report Distribution list that has been set up.

Click Apply Changes once you have completed the Campus User details.

The final step will be to invite the campus user to create their Frontline ID. Click on the **General Information** tab and select the Manage User's Access for this Admin link – similar to the button highlighted in yellow, below.

Send Email			
or Approvals			
or Feedback			
for Event Notification			
User Access			
Manage Login Access for this Admin			
risings again riskass for this routin			
Permission Profile	School Visibility Profile	Language	

Then Select, Send Invitation.

No Account Send Invitation

Q: Adding a New Absence Reason

When employees enter an absence, they choose from a list of predefined absence reasons.

Reference Data > Absence Reason

Select **Add Absence Reason** to create a new reason for your employee. From here, you can enter a name, assign time usage preferences, and determine your settings.

+ Add	+ Add Absence Reason + Add Absence Reason Bucket							
Nam	10	Public to Employee	Needs Approval	Hold Until Approved	Enforce Balances	Require Notes to Admin	School	
D	Bereavement				×			
	Illness				× .			
Jury	Duty	×	× .	×	ж	×	Victoria County Community Schools	
Milit	ary Leave	× .	×	×	×	×	Victoria County Community Schools	

Basic Details

New Absence Reaso	n		Cancel Save
Name *	Edit Language Definitions	School *	
Enter Name Here		None Selected	Schools 👻
External ID	External ID 2	Data Analysis Category	*
		Select One	~
Phone Menu#		Employee Types	
		Employee Types	All *
		All	

- 1. Name: Enter the Absence Reason name viewable to employees
- 2. School: Select which school can use this absence reason
- 3. External ID & External ID 2: Include an ID for Data Imports
- 4. Data Analysis Category: Select the category which best matches the absence reason.
- 5. *Employee Types:* Select which employee types can use this absence. The system automatically assigns "All". Select specific types from the dropdown menu to limit and define this option.

Settings

Settings		
Public to Employee	Enforce Balances	Need Approval
 Enforce Notes to Administrator 	 Hold Until Approved 	

- Public to Employee: Check this box to allow employees to view and select this absence reason when entering an absence. If there are reasons which employees should <u>not</u> be allowed to select, leave this box unchecked.
- 2. *Enforce Balances:* Check this box if you will add employee balances for this reason. Enforcing balances will prevent employees from entering absences with this reason once they exceed their balance.
- 3. Need Approval: Check this box to require administrator approval in the system prior to an absence reasons' use.
- 4. Enforce Notes to Administrator: Check this box to require employees to make an entry within the "Notes to Administrator" field.
- Hold Until Approved: Check this box to hold any absence with this reason until an administrator provides approval. Teachers On Call recommends that this box is not checked – TOC can <u>not</u> fill an absence until it is approved <u>if</u> this box is checked.

Click **Save** once you have completed the Absence Reason Details and Settings.

Q: Adding New Absence Reason Balances for Employees

Absence Reason Balances can be updated for employees individually or by using an import.

Adding an Employee's Reason Balance individually

In Absence Management, you can adjust or edit the absence reason balances for any employee. To do this, search for the employee. Once you click on their name, you will be taken to the employee's general info page, then click on the tab **Absence Reasons**.

ſ	General Information Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Allocation Groups	Absence Approvers	Reports	
ſ	Employee General Address							
	Select Another Employee Cro Make this Employee a Substitu	ate an Absence Add E ite	mployee 🗐 Sen	d Letter/Email				

On this page, you can see the employee's current balances. You can also edit and add to the balances if needed. To edit the initial balance or the "As of Date", simply click the **Edit** button and make the changes. Make sure to click the **Apply Changes** button to save your changes.

				Employee: Smit	h, Matt
Values in the fields t	elow will update	all Absence Reaso	ons that are selec	ted in the action column.	
As of Date	Add Ba	lance to existing t	balance		
Add Absence Re	asons				
Absence Reasons	Tracking Type	Initial Balance	As Of	Time Used	Current Balance
Personal Day	Daily	*3	07/01/2011	0	3
	Make yo		ere	Edit Apply Changes	Cancel

Adding New Balances for Multiple Employees through a Data Import

There are two options for importing employee absence balances, based on where the information is found.

If you are already tracking balances in another program, you can extract those balances from the other program as an Excel workbook, format the spreadsheet according to our importer's specifications, and then import it in. Click here for more details about that method.

If you are not already tracking balances in another program, you can build an import template in Report Writer, and then fill in the correct information in Excel.

Option 1: Importing/updating balances from another outside program into Absence Management.

When updating balances or importing them for the first time, you may already have the correct balance information in another system. If that's the case, you can avoid double-entry by pulling a report of those balance from the other program as an Excel workbook, formatting the spreadsheet according to our importer's specifications, and then importing it into Absence Management. Here is the format you'll need to use for that import:

Identifier – This column should contain the employee number for each employee who will be receiving a balance. Make sure that these numbers match the *Identifier* fields on your employees' General Information pages.

Absence Reason External ID – This column should contain the code for each absence reason that you are importing a balance for. Make sure that these codes match the *External ID* fields for your absence reasons. You can verify this by going to **Reference Data** > **Absence Reasons**. Click on the name of the absence reason to see the External ID field. If the External ID field is blank, you will need to create an External ID for that absence reason.

Balance – This column should contain the number of days (or hours) the employee has for the absence reason indicated in the Absence Reason External ID column.

As of Date – This column is used by the system to determine when the indicated balances were accurate. Please note that the system interprets this information to mean that the balance is accurate *as of the end of the day* on the As of Date, and will *not* deduct that day's absences as time used. You always want to use the day *before* the date that you want absences to start deducting from the balance. For example, if absences should start deducting from the employee's balance on 7/1 you would use an As of Date of 6/30.

The following table provides an example of three employees (Identifiers 006849, 098760, and 654646) who are each receiving a balance for three different absence reasons (External ID's 001, 100, and 150), as of 6/30/2016.

Identifier	Absence Reason External ID	Balance	As of Date
006849	001	10	6/30/2016
006849	100	8	6/30/2016
006849	150	16	6/30/2016
098760	001	9	6/30/2016
098760	100	10	6/30/2016
098760	150	18	6/30/2016
654646	001	11	6/30/2016
654646	100	12	6/30/2016
654646	150	12	6/30/2016

The following table shows an alternative and perhaps easier way to format this spreadsheet, depending on how your other program exports this data. This would import the same information as the information in the previous table.

Identifier	Absence Reason External ID 1	Balance 1	As of Date 1	Absence Reason External ID 2	Balance 2	As of Date 2	Absence Reason External ID 3	Balance 3	As of Date 3
006849	001	10	6/30/2016	100	8	6/30/2016	150	16	6/30/2016
098760	001	9	6/30/2016	100	10	6/30/2016	150	18	6/30/2016
654646	001	11	6/30/2016	100	12	6/30/2016	150	12	6/30/2016

Once you have the spreadsheet complete, you are ready to import the employees' balances.

Option 2: Creating a report in Report Writer to Import balances.

To create the import template, navigate to Reports > Report Writer. Under the Employee Information section, click **Create New**.

Employee Information (<u>Create New</u>)										
Name	Access	Created	Created By	Last Run	# Runs					
##AppliTrack Web Services: Employees		1/12/2015 5:21 PM	System		0	<u>Use as template</u> <u>Run with new filters</u> <u>Run with Saved Filters</u>				
Active Employee DBKevs		6/23/2017 8:45 AM	Matt Smith	6/23/2017 8:45 AM	1	<u>Edit</u> Run with new filters Run with Saved Filters	啬			
Employee Identifiers		5/7/2009 1:56 PM	Nav. Super User		0	<u>Edit</u> Run with new filters Run with Saved Filters				

Name the report "Absence Balance Import Template." The report fields should include **Full Name**, **DbKey**, and three static fields with **Balance**, **Absence Reason External ID**, and **As of Date** in the column label section.

Employee Information Report Name: Absence Balance Import Template Report Configuration				Private Save Preview	Published Public Save & Run Cancel
Available Fields	Report Fields Filter, 0	Group, Sort			
orane oombo branch	Field	Column Label	Align	Function	Length
Search for a field	⊞ Full Name		● Left ○ Right	•	75
Full Name FGS	🗉 DbKey		● Left ○ Right	····· T	10
First Name FGS	□ Static	Balance	● Left ○ Right	····· T	1
Middle Name FGS	Pad Character Assign values to ranges	Value	Format #.00 (12.3456 =	12.35)	•
Employee Identifier (F)(G)(S)	Static	Absence Reason Externa	el ID 🔍 Left 🔍 Right	····· T	↓ 1
External ID 01 (FG(S)	Pad Character Assign values to ranges	Value	Format #.00 (12.3456 -	12.35)	•
External ID 02 FGS	⊟ Static	As of Date	● Left ○ Right	•	↓ 掛
External ID 03 FGS	Pad Character Assign values to ranges	Value	Format #.00 (12.3456 =	12.35)	•
Row Number G(S) Other Fields Accounting Code Description F(G(S))					-

On the "Filter, Group, Sort" tab, you can include filters to narrow down the group of employees that you would like to import balances for. If you are importing balances to all "active" employees, include the Active filter and make sure only **YES** has a check mark. If you need to filter for a certain group of employees, you can also include the Full Name filter or the Employee Type filter.

Run the report and select the Excel Compatible output type. Once you download the file, click **SAVE AS** and change file type to **Excel Workbook** (.xlxs format).

On the spreadsheet, fill in the columns for **Balance**, **Absence Reason External ID**, and **As of Date** using the following as a guide.

Absence Reason External ID – This column should contain the External ID for each absence reason that you are importing a balance for. You can find these External ID's under **Reference Data** > **Absence Reasons**. Click on the name of the absence reason to see the External ID field. If the External ID field is blank, you will need to create an External ID for that absence reason.

Balance – This column should contain the number of days (or hours) the employee has for the absence reason indicated in the Absence Reason External ID column, as of the date indicated on the As of Date column.

As of Date – The As of Date is what the system uses to determine when the indicated balances were accurate. Please note that the system interprets this information to mean that the balance is accurate *as of the end of the day* on the As of Date, and will *not* deduct that day's absences as time used. You always want to use the day *before* the date that you want absences to start deducting from the balance. For example, if absences should start deducting from the employee's balance on 7/1 you would use an As of Date of 6/30.

Once you have the spreadsheet complete, you are ready to import the employees' balances.

Q: Adding New Accounting Codes

To access accounting codes, click **Reference Data** > **Accounting Codes**.

The Accounting code table holds both a verbal description as well as the actual code number that is associate with that verbal description. Additionally, the accounting code can be associated with a particular school. This will help ensure that the dropdown lists associated with given accounting codes are not overly cumbersome. Each school will only be able to choose from appropriate accounting codes.

Additionally, the code can be marked as "public" or "private". Permissions on the principal profile will control whether or not a school level administrator has rights to "private" accounting codes.

	Accounting Codes							
	Description	School	External ID	Public				
+				1				
/音	Accounting Code 123	Victoria County Community Schools	123-123-123					
 × 	Accounting Code 321	Victoria County Community Schools 📀	321-321-321	2				
∕苷	Accounting Code Test	Victoria County Community Schools	ACT	V				
∥疳	Test		12345678912345678912	1				

To add an accounting code, click the blue + to the left of the blank text boxes. To edit an existing accounting code, click the pencil lcon to the left of the code you want to edit. If you would like to delete an accounting code, click the trash can lcon to the left of the code you want to delete.

Associating an Accounting Code with an Employee

On the employee's general Information page, a default accounting code can be selected that would be automatically assigned to the absence upon creation of the absence. This code could be modified later by an administrator with the appropriate permissions (In order to override a particular budget code selection).

To associate an accounting code with an employee, first click the **Edit** button at the top or bottom of the page. Then, click on the dropdown menu to select an accounting code.

	Accounting Code	
	None Selected	‡
	Email Approval Statu	us Updates
1.	Í	
e External ID 2		Employee External ID 3
Remove	Apply Changes Cancel	
Fields marked with	an asterisk * are required.	

Once a default accounting code has been selected for an employee, this code becomes the default for any new absence that is created for that particular employee.

Q: Absence Approval

Using Absence Approval as a designated Absence Approver

If your district is utilizing the Absence Approval functionality and you have been designated as an Absence Approver in Frontline, follow the steps below to approve your employees' absences. To access absences which need approval, follow these steps:

Acco	ounting Code:	All Accounting Codes 4 Budget	t Code: All Bu	dget Co	des \$			
۹	Search							
4	Absen	ce Approvals						pprove Selected Deny Selected
	Conf.#¢	Name Ø	Date +	~	Reason	Duration	Status	Actions
			3/3/2020	~	Personal Day	1 day		Anorres Depr
	410507763	Banner, Robert		•				· opprove beily
	410507763 410507994	Banner, Robert Canelo, Henry	3/3/2020	~	Jury Duty	1 day		 Approve Deny
	410507763 410507994 409835795	Banner, Robert Canelo, Henry Assaad, Tamer	3/3/2020	• •	Jury Duty Personal Day	1 day 1 day		Approve Deny Approve Deny

Step 1: click Absences > Approval.

Step 2: Enter the appropriate start and end dates if you need to view specific absences within a specific time period for approvals

Step 3: You can filter on partially approved, approved, denied or unapproved absences.

Step 4: Check the box on the left and click **Approve** or **Deny**. Multiple absences can be approved or denied at the same time.

1	1 Absence Approvals Approve Selected Deny Selected							
0	Conf. # ≎	Name ¢	Date 🔺	~	Reason	Duration	Status	Actions
•	253220577	Romanoff, Natasha Espionage Specialist	4/17/2017	*	Personal Day	1 day		Approve Deny

Note: If you no longer have the option to Deny the absence, you may have passed the allotted period of time for denying an absence that has been set up within your District. Please be sure to cancel this absence within the system.

Setting up a new Approver Profile

Security > Approver Profiles		

The Approver Profile tells absence management which employee types, schools, and absence reasons the approver will approve for. You won't have to create separate approval profile for each approver, but you will have to create a separate profile for each approval process. First, click the **Add a new profile** link.

Approver Profile List						
Add a new profile	Profile Description	Profile	Associate			
All schools (10/29/2015 8:48 AM)		<u>View</u> <u>Edit</u>	View Associate			
Approvals for Nurse Manager (5/20/2010 11:30 AM)	Approvals for Nurse Manager	View Edit Delete	View Associate			
Principal Approval Setup (7/21/2010 1:33 PM)	Principal Approval Setup	<u>View</u> <u>Edit</u>	View Associate			

Now, give the approver profile a name and description. Then, configure the approval details.

Return to Profile List	
Profile Name:	
Profile Description:	

- School: If the profile is going to be used by various Campus Users, you can leave this as "Any".
- Employee Type: If a specific employee type is needed for approvals, select it here.
- Absence Reason: Choose the Absence Reason that will need approval.
- Level: Level is used for multi-level approvals. If you'd like to add more schools, employee types, and absence reasons, you can add lines to the Approver Profile by clicking the blue +.

School	School Employee Type		Level	Allow	Disallow					
Any	Any ᅌ	Any	1	0						
					+					
Changes will not be saved	Changes will not be saved until the Apply Changes button is clicked. Unsaved changes are color coded.									
	New Row	Deleted Row								
	Apply C	hanges Cancel								

When you are done editing the profile click **Apply Changes** to save.

Assign the Approver Profile to a Campus User

Once you have set up the Approver Profile, you can assign it to Campus Users. Keep in mind that the absence Management system will always respect the School Visibility and Employee Type Visibility. For

example, even if the approver profile says the Campus User can approve for any school, the system will only let them approve for the schools in their School or Employee Type Visibility Profile.

Security > Principal Web > Campus Users

Click the name of the Campus User to open up their "General Information" page.

Perez, Juila	(610) 245-8795	jperez@victoria.edu	All Schools	View
Queen, Oliver	(484) 965-2317	oliver.queen@arrow.com	Ackbar	View
Smith: Mickey	(484) 629-8734	mickey@tardis.com	All Schools	<u>View</u>

Click the E	dit button,	and then	choose the	appropriate	Approver	Profile in the	dropdown menu.
--------------------	-------------	----------	------------	-------------	----------	----------------	----------------

Permission Profile	School Visibility Profile	Language
Mickey Smith 💠 🗸	Walker Middle School	none selected +
Employee Type Visibility Profile All Staff	Approvals for Nurse Manag ✓ Principal Approval Setup None selected	/ New
Pin	Pin Expired	Pin Expires
* 1000		1 miles
	Remove Edit Apply Change	SCancel
	Fields marked with an asterisk * a	re required.

Click Apply Changes to save your changes.

Note: Keep in mind that if an approver profile is shared by more than one Campus User, then any change they make to the profile will affect all Campus Users it's assigned to. When making changes to approver profiles, first check to see who it is assigned to and decide if you want those changes applied to those users.

IVR Telephone Feature

R: IVR System

The automated scheduling system is also accessible through IVR telephone technology for district employees and substitutes. They will need a touch-tone telephone to use the IVR system.

This feature only allows for one absence to be recorded at a time, whether a single day absence or multiple day absence. In order to access the IVR system, they will need the following information:

- Employee's Phone ID (telephone number including area code)
- Employee's Phone PIN

Frontline Mobile App

S: Frontline Mobile App

Insights Platform organizations also gain access to the Frontline Education mobile app! The app provides increased accessibility to features such as absence creation, Leave Balance recognition, and multiple absence tracking tools.

Your school district must be on the Insight's Platform to use the Frontline Mobile App

- 1. Go to the App Store or Google Play and search 'Frontline Education'.
- 2. Click "Get Started" (this will only appear the first time you log in)
- 3. Enter your login credentials, including your Frontline ID and password.
- 4. If you don't know your password, use the forgot password button at this link to reset.

*Once signed in, you may be prompted to select an organization if you are listed in multiple Frontline Organizations.

- As an administrator, if you have more than one profile (Administrator, employee, etc) you will have the option once logging in to select the role you would like to access.
- 6. Once logged in, you will have a button at the top that says "Switch" where you will have the ability to switch between the user accounts you have within Frontline.





Select a Role

Organization User

Campus User

Home Page: The homepage displays information applicable to your account. Possible features include current absences, scheduling an absence, and if enabled for your organization, absence approval and leave balance details. If your organization is using Time & Attendance you may also see options for clocking in/out and timesheet details.



Menu/Side Navigation: The Menu option options a side navigation bar where you can access the tools and settings available to you.

- Absences: The page includes upcoming or past absences and the option to schedule an absence. View available Paid Time Off (if leave balances are enabled) and any approved absences (if absence approval is enabled).
- Calendar: View any upcoming absences
- Inbox: View Web Alerts posted for your Organization(s)
- Help Center: Mobile App Support Documents
- Settings: View your district information or log out of the app If your organization uses the Time & Attendance solution, then you may also see the menu items Time Clock and Timesheets.

Close	Menu
Q, Search Frontlin	e Mobile
分 Home	
Absences	
🗎 Calendar	
🖂 Inbox	
Help Cent	er
Settings	
○ Feedback	
🚑 Privacy Po	blicy
G	P frontline

Creating an Absence:

Step 1: You can create a new absence through one of two options within the app. Click Create Absence directly from the home page (as seen in the first image) or access the Menu and select the Absences option. From this page, you can press the "+" button (as seen in the second image).

unitable Leave Relaces				
valiable ceave balances	· · · · ·		Overview Upcoming Past	Di
easons	Avail. Days		lanuary	
Doctor's Appointment	2.5	1:	Professional Day © Full Day (7:00 AM - 3:00 PM)	
iersonal Day	2.0	3	Personal Day © Full Day (7:00 AM - 3:00 PM)	
toressional pay	2.0	5	ebruary	
bsences	>	202	Personal Day N © Full Day (7:00 AM - 3:00 PM)	
lanuary				
3 Professional Day © Full Day (7:00 AM - 3:00 PM)	>			
Personal Day e Full Day (7:00 AM - 3:00 PM)	>			
ebruary				
Personal Day © Full Day (7:00 AM - 3:00 PM)	>			
Create Abconce				

Step 2: From here, you will select an absence reason and then press the arrow in the bottom right corner to proceed.

Step 3: Select a date (or date range) from the calendar and press the arrow in the bottom right to proceed.

Step 2

Step 3

	Can	cel	Crea	ate Abs	ence		
hy?	w	hen?					
gency			Dec	ember :	2019		
	1	2	3	4	5	6	
tor's Appointment	8	9	10	11	12	13	
rsonal Illness	15	16	17	18	19	20	
iness	22	23	24	25	26	27	
isclosed Illness	29	30	31				
			Jar	nuary 2	020		
	5	м	т	w	Ŧ	,	
				1	2	3	
ry	12	13	14	15	16	17	
(c) (a)	Step	3 of 5 : Choose L	ength			$\langle \rangle$	

Step 4: Determine the Absence's duration. You can choose from a list of timeframes that include "Full Day," "Half Day AM," "Half Day PM," and/or "Custom." If you select the "Custom" option, you can select the pencil icon beside the start and end time to indicate the alternate timeframe. Please note that all options may not be available for all users based on your districts system requirements.

Once you are finished, press the right arrow to continue

Step 5: Identify whether a substitute is required. Select the "Yes" or "No" option based on your position's requirements and press the right arrow to proceed.

Ste	ep 4	Step 5
9:41+7 Cancel Creat	te Absence	9:41 / Cancel Create Absence
How Long?		Substitute
Full Day	Half Day AM	Is a substitute required?
		Yes No
Half Day PM	Custom	Your district indicates that this absence requires a substitute, if you think this is incorrect, please conta your administrator.
Start Time:	End Time	Note to substitute
Step 4 of 5 Next: View Summary	<	Step 5 of 5 Next: View Summary

Step 6: The final Summary page provides an overview of the selections you made. These details include the location, absence reason, timeframe, and confirmation for whether a substitute is required. You can also include a personal note to the administrator prior to submitting the absence.

Once you are ready, press Submit Absence to create the absence request. A confirmation message will appear.

Review		
31 Tuesday December 31	7:00 AM 3:00 PM	
Location VC Elementary Schools		
Reason Illness > Personal Illness		
Substitute Required	~	
ote to administrator		
Add your note here		
<) Subr		



If you select the "View Absence" option, the app will display the absence details (e.g. approval status, confirmation number, etc.). Review these details, as needed, and press Edit (in the top left corner) if any adjustments need to be made. Otherwise, press the Home button at the bottom to return to the homepage.



Absence Approval:

To approve an Absence through the Mobile App feature-click on Approvals from your homepage. Here you can view the absences that are pending approvals. Click on an individual from the list to approve or deny their absences.





T: Troubleshooting Absence Management Access

Resetting Passwords

Administrators cannot view or change users' passwords. To change your password, you must select the "I forgot my PIN or password" link on the Frontline Absence Management login page.

You will be asked to provide your Frontline username, and the system will then email you a link to click on. The link will redirect you to a password reset page where you can create a new password.

If you receive an error that your Frontline username cannot be found, go to http://app.frontlineeducation.com and try the "Forgot Password" link on that login page.



Recovering Usernames

Users can recover their Frontline username(s) by selecting the "I forgot my ID or username" link on the Frontline Absence Management login page.

You will be asked to provide the email address associated with your account, and the system will then email you a list of your usernames.

If you receive an error that your Frontline username cannot be found, go to http://app.frontlineeducation.com and try the "Forgot Username" link on that login page.

Frontline
Absence Management Formerly Aesop
Sign In
PIN or Password
Sign In Lforgot.my.ID.or.saername Lforgot.my.PIN.or.password
Having trouble signing in?

🚍 frontline

Sign in with a Frontline ID

🔗 Sign In with Frontline ID

Forgot Username Forgot Password

ine Password

Merging Multiple Frontline Accounts

Some users may accidentally create more than one new Frontline ID account. If this occurs, you can simply sign in through one of these new Frontline ID accounts, select the dropdown beside your name in the top right corner of the page, and click Account Settings. Then, select the Applications link from the side menu.

This page lists any applications currently associated with the Frontline ID account. You can click the merge your accounts link to associate any additional accounts you use.

A pop-up box displays. Enter the username and password for the additional Frontline ID account(s) you created and click Verify & Add Account.

This action merges that secondary account (and the application(s) associated with that account) into this single account. Once complete, you will have the ability to switch between applications while remaining signed in.

	Organization User (Superintendant)	φ.	ACCOUNT	Settings
ne 📕	YOUR FRONTLINE ACCOUNT		Profile Frontline ID	Profile
the	() Sign Out) Sign Out		Basic Information
Accou	unt Settings			
Profile Frontline ©	Applications			
Address	 Below is a list of your org Applications with the a interporarily locked your a Do you have multiple From applications? Why not me that you can easily switch 	anization con indic iccess to ntline ID erge.your	is with connected ap rate that your district this organization, accounts to access y accounts into one a accounts into one a	plications. has our ccount so ons?
	Merge a Front This tool merges your inform successful, the oth Please verify the credentials of	tline li nation ir er acco f an acci	D Account ite one account. W unt will close. ount you'd like to n	X hen nerge.

U: Need Help?

Contact the Teachers On Call Talent Services Team to:

- Modify absences that the system is not allowing you to update yourself
- Notify Teachers On Call of absence changes if the change is made the day after when the substitute worked and may affect the substitute's timecard
- Locate your Login ID/Frontline ID
- Receive assistance or information if you are unable to access the system
- Ask questions regarding the use of Absence Management or Teachers On Call

Call 1-800-713-4439 during regular business hours if you experience technical difficulties using Absence Management or need assistance logging an absence.

We look forward to providing you the convenience of Frontline Education's Absence Management Solution.

Please share your feedback with Teachers On Call.

Thank you!