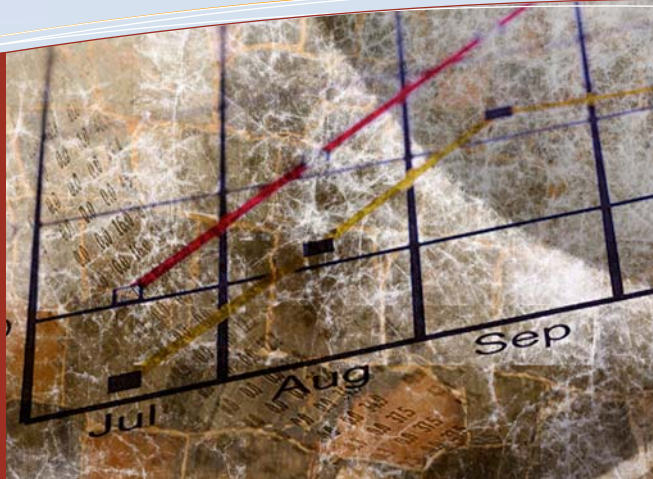


Districts Modifying the School Year

As districts struggle with the budget situation, some districts have decided to modify the school year, which may require changing the cycles an employee gets paid on. If this is a potential solution for your district, contact your county office and they will be able to assist during this transition.

There are many steps that need to be taken for the Frequency Change to be successful and to have the least amount of impact on the payroll staff. Various steps can be done behind the scenes prior to the Payroll Fiscal Year Roll for an entire district or for each Pay Calendar. If there are other situations by various groups of employees, those changes can not be automated and will require manual work.

Regardless of the decisions being made, it is vital to contact your county office as soon as possible to ensure that assistance can be given before the next fiscal year is generated and rolled.



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Using Purchasing 2000 to Help in Reviewing Department Spending

Due to the severe fiscal challenges all districts are facing, some districts' business administrators are currently reviewing the processes defined in the Purchasing 2000 system to assure that spending is more closely monitored.

For example, the San Bernardino County Superintendent of Schools Executive Cabinet agreed that oversight of department spending needed to be increased to raise the level of awareness of what was being purchased and determine whether the purchase was needed immediately or could be deferred.

The Purchasing Department with some guidance from the Information Technology Department reviewed and modified the system to incorporate the dollar limits and approvals as noted below:

1. Final approval of requisitions less than \$500 rests with the department Manager or Principal
2. Final approval of requisitions \$500-\$4999 is decided by the appropriate Director, Area Director or Administrator
3. Final approval of requisitions \$5000 and above is decided by the Division Assistant Superintendent
4. Final approval of requisitions \$25000 and above is decided by the Assistant Superintendent, Business Services Division

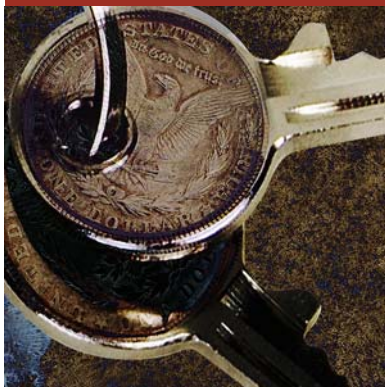
These changes were incorporated in the Purchasing 2000 application by adding new position approval rules to the existing rules along with defining the dollar amount limitations attached to the qualified approvers.

By reviewing a district's existing policies and procedures coupled with modifications to the approval process within the Purchasing 2000 application, a district or county office can have an increased awareness of purchases, which could help to monitor spending.

Payroll Year End

The end of fiscal year 2009/10 is quickly approaching and payroll staff should be gearing up for the payroll generation and roll needed for the new 2010/11 fiscal year. The CECC Payroll Fiscal Year End Meeting scheduled for Wednesday, April 28, 2010 is a good opportunity for county and district staff to refresh their memories on the processes that only happens once a year. The meeting will start at 9:00 AM and will be held via video conference and GoToMeeting. Both County and District Payroll and Support Staff are encouraged to attend.

CECC staff will be discussing the year-end procedures for County and Districts as well as going through all the checklists and tasks necessary for the New Year. Documentation will be provided on SharePoint by April 12 and each Member will have the option to decide when their individual Checklists and Authorization pages are due into their County Offices for processing.





UPCOMING EVENTS

Meetings and Trainings for May, June & July

Small District User Meeting – TBD

County Support Group Meeting –
05/12/10

EPICS Additional Earnings Design
Committee 05/18/10

Accounts Payable Year End Meeting
– 05/20/10

Accounts Receivable Year End
Meeting – 05/20/10

Financial 2000 Purchasing/Stores
Fiscal Year End Meeting – 05/21/10

Security Design Meeting – 06/09/10

Financial 2000 Purchasing/Stores
User Group Meeting – 06/17/10

[Link to Calendar](#)

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What is an “EPICS Process”?

One of the new features in EPICS is the “processes”. You may not be clear on what a “process” is and what benefits are to be gained by using this new feature.

There are common actions that occur consistently such as hiring, terminating, and transfer of positions when maintaining employee information. Previously in both the MAGIC and PC2000 systems, should any one of the actions occur, the technician would need to update data in multiple screens to complete the action. Should some data entry steps be missed, the end result could be incorrect data in payroll or budget or even incorrect reporting in the future.

Although these common employee actions may continue to be maintained in the prior manner, the EPICS process screens provide data elements that cross multiple sections of the employee edit page so that all important fields necessary for payroll,

budget, and reporting are available in one entry page. Fields that may have not been required in the old method of entry may become required in a process.

Previously what were recommended methods of data entry discussed at training or documented in a manual are now systematically done in the process. Consistent data entry in the EPICS process page results in consistent reporting output in Reports 2000 as well.

There are two additional benefits in using the EPICS processes: Change History transaction and PAF reporting. When a process is utilized, a specific transaction is entered in the Change History log. For example, if an employee is terminating and the new Termination process is used, a transaction will be systematically entered in the change history log that indicates “Termination” at a summary level and at a detail level reports the date, the reason,

the new status, and the position that may have been ended. If a user enters a termination in the system the old method, the system would probably get two summary transactions in the log: General Change and Position Attach Change neither setting focus to the actual action that happened. Lastly, each EPICS process generates a PAF (Personnel Action Form) and each PAF report is designed based upon the date elements defined in the process. The PAF reports are an excellent communication tool between departments that share the employee/position control database.

Change is sometimes painful and change is sometimes good. If you are not currently taking advantage of the new EPICS processes, now’s the time to make a change in your data entry methods and enjoy the benefits.

This Issue’s Q&A Tip

Q: Is there a way to view the workflow of any position within Purchasing 2000?

A: Users with access to Purchasing Reports can run reports that display workflows that contain open requisitions. These reports provide the ability to monitor workflow progress and pending workloads of positions and are available to view in PDF, Word, or Excel formats.

Each of these four reports provides a filter to view a specific position, if desired, and once run will display the requisition number, requisition type, description, vendor name, total amount, requestor’s position, location date/time stamp and cause of last status (created, approved, etc.). The details of each specific report and the results you will achieve are as follows:

Open Requisition Report by Workflow Position Report - displays all open requisitions summarized by workflow position

Open Requisition Report by Workflow Position with Log History Report - displays all open requisitions summarized by workflow position, and includes the **log detail** for each requisition listed

Open Requisitions by Workflow Position with Approval Trail History Including Comments Report - displays all open requisitions summarized by workflow position, and includes the **approval trail action** and any **comments** that were added for each requisition listed

Open Requisitions by Workflow Position with Log and Approval Trail History Report - displays all open requisitions summarized by workflow position, and includes the **log detail** and **approval trail action** for each requisition listed

OPEN REQUISITION REPORT BY WORKFLOW POSITION						
WORKFLOW POSITION: Account - Director						
Req#	Req Desc	Vendor Name	Total Amt	Regstr Position	Loc	Cause of last status
4081	Posters	COMPUTER PRODUCTS, INC.	\$732.31	Clerk	High School	Requisition Approved - Sent to Next Approver
4015	Books	FERMA PRODUCTS, INC	\$917.34	Clerk	High School	Requisition Approved - Sent to Next Approver
4026	Graph Paper		\$16.32	Secretary	Middle School	Requisition Sent for Approval