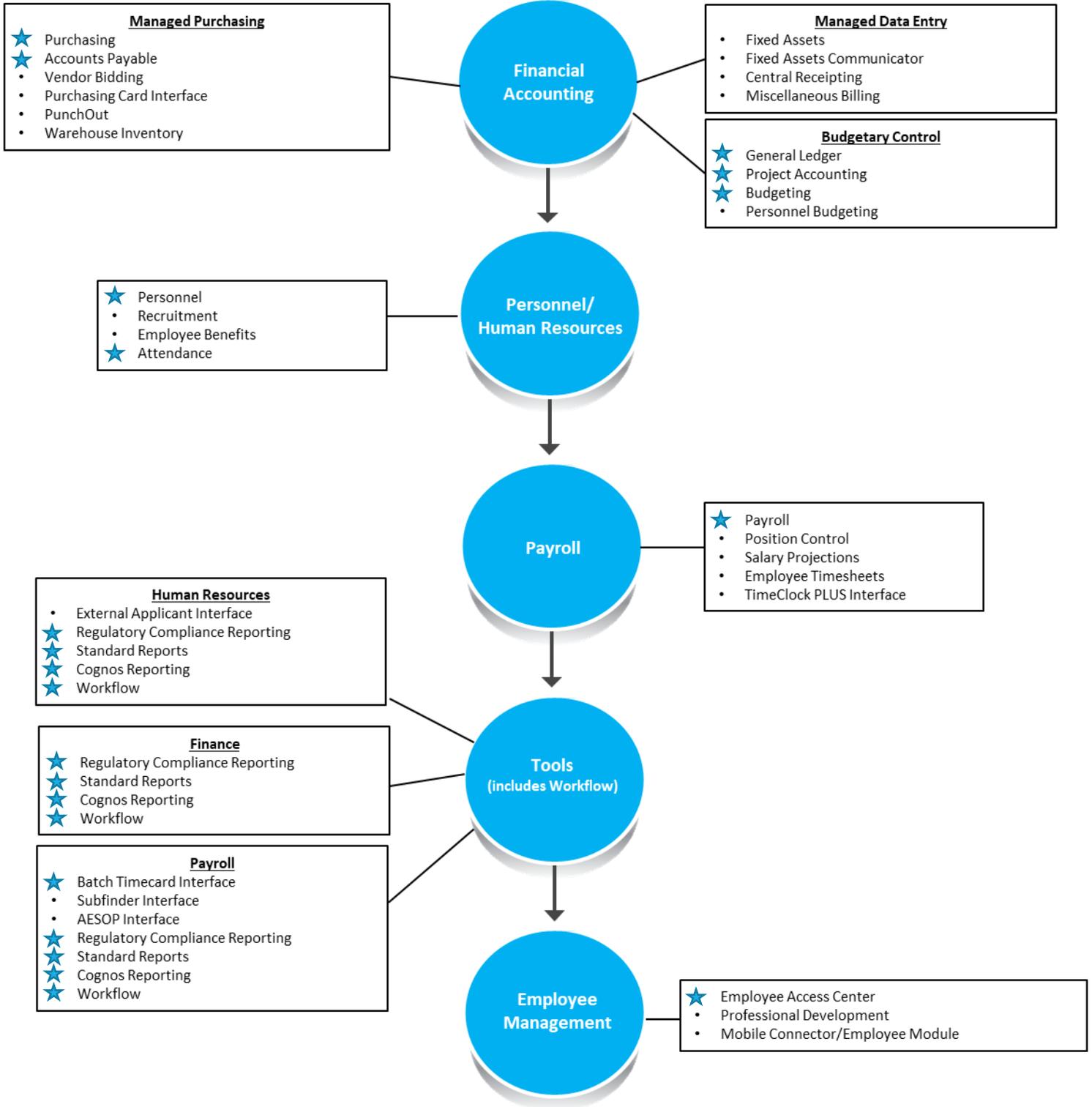




# eFinancePLUS

★Denotes the modules included in initial VT-SSDDMS Go-Live



## eFinancePLUS

### Contents

eFinancePLUS – FINANCIAL MODULES .....	5
<b>Financial Accounting</b> .....	5
Managed Purchasing .....	5
<b>Purchasing</b> .....	5
<b>Accounts Payable</b> .....	5
<b>Vendor Bidding</b> .....	6
<b>Vendor Access Center</b> .....	6
<b>Purchasing Card Interface</b> .....	6
<b>PunchOut</b> .....	6
<b>Warehouse Inventory</b> .....	7
Managed Data Entry .....	7
<b>Fixed Assets</b> .....	7
<b>Fixed Assets Communicator</b> .....	8
<b>Miscellaneous Billing</b> .....	8
<b>Central Receipting/Accounts Receivable/Cash Receipts</b> .....	8
Budgetary Control .....	8
<b>General Ledger</b> .....	8
<b>Project Accounting</b> .....	8
<b>Budgeting</b> .....	9
<b>Personnel Budgeting</b> .....	9
eFinancePLUS – PERSONNEL / HUMAN RESOURCES MODULES .....	10
Human Resource Workflow .....	10
<b>Personnel</b> .....	10
<b>Attendance</b> .....	10
<b>Recruitment</b> .....	10
<b>Employee Benefits</b> .....	11
PAYROLL .....	11
<b>Payroll and Benefits Management</b> .....	11
<b>Position Control</b> .....	11

<b>Salary Projections</b> .....	11
<b>Employee Timesheets</b> .....	12
TOOLS .....	12
Human Resources, Finance & Payroll .....	12
<b>Workflow</b> .....	12
<b>Standard Interfaces</b> .....	<b>Error! Bookmark not defined.</b>
<b>Regulatory Reporting</b> .....	<b>Error! Bookmark not defined.</b>
<b>Standard Reports</b> .....	12
<b>Cognos Reporting</b> .....	12
<b>Schools Interoperability Framework (SIF) Agent</b> .....	13
<b>LearningPLUS</b> .....	13
EMPLOYEE MANAGEMENT .....	14
<b>Employee Access Center</b> .....	14
<b>Professional Development</b> .....	15
<b>Employee App (Mobile Connector and Employee Module)</b> .....	15

## eFinancePLUS – FINANCIAL MODULES

### Financial Accounting

Easily manage all your day-to-day financial accounting and purchasing processes with one click. This true fund accounting solution adheres to all GAAP, GASB, and GAAFR requirements, and its real-time database maintains fiscal, purchasing, and budgeting information. Most importantly, it provides simple-to-use processing centers and helpful wizards to make it easy for district staff to manage daily fiscal operations. To provide a complete accounting of your district's fiscal activities, it is integrated with Human Resources and supports Student Activities accounting.

### Managed Purchasing

#### Purchasing

Purchasing makes it easier to request, approve, and order items, ensuring your district stays within its allotted budget. Quickly enter requisitions with full access to available vendors, commodities (NIGP or your own), budget balances, and more. Immediately pre-encumber requests and add attachments (photos, documents, etc.) as supporting documentation. Based on established parameters, the system will automatically notify all approvers by email with a direct link to the approval screen to review requisitions. Purchasing staff can view all approvals and attachments and, with one step, convert requisitions into purchase orders and encumber the funds. Every step along the way, personnel can choose to receive email notifications on the progress of their purchases. Send purchase orders to vendors via hard copy, email, or fax. When the item arrives, you can record it was received, which notifies Accounts Payable. All items purchased from certain accounts or over a site-defined dollar threshold will automatically create a Fixed Asset record and place it in a file for review with all associated purchasing and accounts payable information. In addition, you may choose to allow your staff to use our convenient procurement card solution. eFinancePLUS purchasing features are designed to make it easier for staff to request, approve and order items so they can continue with their jobs while ensuring your district stays within the allotted budget.

#### Accounts Payable

Whether you want to enter a batch or post directly online, you can choose how to pay your outstanding invoices. It is easy to pay existing encumbrances - all you have to do is choose a purchase order, have the details default, adjust any differences, and click OK. If it is a new invoice, simply put the details in the system and charge to the appropriate accounts. If you want to keep a copy of the invoice and detail information, you can attach these documents in any format for future reference. An optional approval process is available for payable entries.

## Vendor Bidding

Easily create consolidated bid lists from requisitions. After the vendor responds, plug in the costs and the system automatically calculates the lowest bidder. Once the bid is awarded, the system will create a purchase order to provide to the awarded vendor. Vendor Bidding is designed to handle all phases of the bid process, from creating bids and entering requests to awarding bids and converting them to purchase orders. Bid process utilizes the Purchasing System's Commodity Codes table for identifying the products and services entered in bids. The system enables you to set up bid records that specifying the commodities users may request and offers an automatic numbering feature for identifying bids. Conversion options allow user to process requisitions from the Purchasing System into bids in the Vendor Bidding System as well as copy previous bids. The system generates lists, known as a Bid Books, for distribution to departments. Personnel can then submit requests using the lists as worksheets. Depending on their security levels and your procedures, Vendor Bidding also allows staff members at designated sites to enter requests directly into the system. It enables you to enter responses from vendors. In most cases, each vendor response requires just one entry per commodity: the bid price. Once all bid information is entered, users may generate a Bid Award Recommendation report that can recommend a bid based on either the price per unit or total price. You can also use the report's option to award bids automatically.

## Vendor Access Center

Efficiently manage the vendor registration processes, reduces routine vendor requests, and distributes vendor 1099 forms. Through this secure web-based portal, vendors can view purchase orders, submit an invoice, and check the status of a payment. Using Vendor Access Center (VAC), your organization can allow potential vendors to register with your organization and allow existing vendors to register as users in VAC. Use VAC in conjunction with the eFinancePLUS software to process invoices vendors have upload through VAC to alert Accounts payable with Workflow notification for ease of payments processing. Once payments are processed within the Accounts payable module, PDF copies are available for viewing from VAC. Additionally, copies of Purchase Order details can also be made available through VAC. Lastly maintenance options are provided through VAC to allow Vendor file updates to be submitted for approval by district staff.

## Purchasing Card Interface

The Purchasing Card (PCard) Interface enables your district to efficiently administer credit card use for employees. Easily assign employees to PCards and specify their roles as administrators, primary cardholders, or card users. When a PCard purchase is made, a vendor transaction is automatically created, reducing the burden on staff.

## PunchOut

PunchOut streamlines the purchasing process by enabling your organization to shop directly on a vendor's web catalog using negotiated pricing and catalogs. When a user checks out from the

website, PunchOut seamlessly imports their shopping cart as an eFinancePLUS requisition to be automatically pre-encumbered and follow the district's standard workflow approval routing. The online shopping can be initiated by authorized employees and allows the details of the online shopping to be returned to the eFinancePLUS purchasing option as a requisition ready for your organization's approval and processing. PunchOut incorporates numerous features which allow your organization's users to connect to a vendor's shopping site and have the items selected turned into requisitions and eventually returned to the vendor for fulfillment. The basic functions include:

- Set-up necessary details for a vendor to allow employees to connect to a vendor's online shopping site.
- Authorized access to PunchOut to sign in using a URL provided by your organization, or users authorized to access to VPO through the Requisition screen in eFinancePLUS.
- Add items from the vendor's site as an eFinancePLUS requisition to be processed as a user would normally process a requisition into a purchase order.
- Automatically searches for orders which have printed purchase orders and sends the order to the vendor for fulfillment.
- Configure details for a live and test environments for setup and training purposes.
- Administration options to define employee and administration users, customize PunchOut messages, and configure URLs.

### Warehouse Inventory

Fully integrated with the general ledger and purchasing systems, Warehouse Inventory provides the capability to requisition from stock, process approvals, generate pick pack lists, and reorder quantities. Personnel requesting items can view up-to-date quantity information, costs, and item details. The eFinancePLUS Warehouse Inventory System is a web-based software system designed to assist you in managing your warehouse activities. The system enables you to process a full range of inventory transactions, from receiving new stock through the filling of requests. At the same time, the software incorporates various controls to maintain proper inventory levels and track warehouse costs. The system interfaces with the eFinancePLUS Purchasing System for receiving shipments that originated with purchase orders. It also allows posting departmental expenses and revenues to the eFinancePLUS Fund Accounting System.

### Managed Data Entry

#### Fixed Assets

Create new or automatically generate asset records for newly purchased items over a district-defined dollar amount or from specific capital accounts. For automatically generated records, Fixed Assets creates a batch file for personnel to review and add necessary detail information

about the asset. It tracks all information for depreciation costs to post to the general ledger and adheres to specific reporting requirements, such as GASB. The solution also allows administrators to attach supporting documentation— photos, leases, insurance or maintenance agreements— to the asset record and easily communicate with appraisal companies.

### Fixed Assets Communicator

This automated interface identifies differences between your system and the appraisal company and allows administrators to update the details in your fixed asset files.

### Miscellaneous Billing

Generate a onetime invoice or set up recurring invoices, either way it's easy. Simply enter the customer's name and the system will search for a match and display the customer information. If no match is found, you can quickly add the customer. Select the services provided such as gym rentals, day care, etc., from a drop down list of your typically provided services. The system will prompt you for details based upon the type of service, drop in the standard fees, and track potential penalties or interest. Produce bills directly from the system and your staff has the ability to take payments over the counter or through the mail with our Central Receipting.

### Central Receipting/Accounts Receivable/Cash Receipts

Easily generate a onetime invoice or set up recurring invoices. The solution will prompt you for details based upon the type of service, drop in the standard fees, and track potential penalties or interest. Produce bills and take payments over the counter or through the mail with Central Receipting.

### Budgetary Control

#### General Ledger

General Ledger is accurate, complete, and flexible – it consistently receives high marks from auditors about its capabilities, reports, and processes. The solution automatically handles routine operations so that district administrators can concentrate on the decision points. Improve the efficiency of your business operations with default templates for journal entries, easy reversals, ability to work in multiple periods, simple displays and drill downs, and the ability to attach and view documents associated with transactions.

#### Project Accounting

Track grants and projects across multiple fiscal years to get a full picture of how much money has been received and spent. An automated link to the general ledger chart of accounts allows district administrators to default specific projects within organizations to ensure these transactions are not missed. This solution is also capable of defining and adding district-defined fields to track detail information on projects and grants.

## Budgeting

Make your budgeting process easier by using your current year's fiscal information as a starting point to create next year's budget. Simple steps allow the budget administrator to pull year-to-date actuals, estimate costs to the end of the year, and produce multiple versions of what next year's budget may look like. You can assume business as usual and apply decreases or increases by buildings, accounts, across the board, or individual line items. As soon as you get the version you are satisfied with, put it in the hands of your administrators to adjust as needed. Many features are available for capturing and automating all details of your budget process. For example, you can easily tie personnel details to budgeted line items. Shortcuts like these allow you to efficiently manage your budgeting process from start to finish. When your budgeting process is complete, simply click a button to start your new year with the approved budget.

## Personnel Budgeting

Easily and automatically feed positions and employees' salary and benefit information into a budgeting environment and use this information to create unlimited versions of next year's budget. Utilize capabilities to increase employees' salaries for the rest of the current year and provide increases for next year to create an accurate budget. Fringe benefits can also be included. Additionally, changes that you made to existing, new, or vacant positions can be applied to next year's Position Control tracking.

## eFinancePLUS – PERSONNEL / HUMAN RESOURCES MODULES

### Human Resource Workflow

Manage employee leave requests without impact on your HR or Payroll staff! eFinancePLUS provides the district's employees with an intuitive and informative Employee Leave Request form to submit leave requests and notifications. Employees see their leave banks, outstanding requested and approved leave requests, and can make informed decisions about their leave. Requests are routed to supervisors and/or others in the district. Approved leave requests optionally update the Attendance records or Employee Timesheets.

Provide HR and managers with an Employee Termination Request and manage the request, approval, and notification process through workflow. Upon approval, the employee record will be updated with the termination information.

The New Hire Recommendation & Notification workflow allows your hiring managers to submit applicants for recommendation to hire for review and approval by your HR department. Upon approval, notifications can be sent to for example your IT department to create employee email addresses and logins, etc.

### Personnel

Given the proper security, district staff members have access to all the information they need to know about an employee. This allows them to easily answer employee or supervisor questions regarding absences, training, certifications, emergency contact information, and much more. Historical information is available on previous positions, salaries, and change in status for all employees. An online wizard guides your staff through an easy step-by-step process for setting up a new employee in the system. In addition, the system has efficient tracking of highly qualified teachers. With our forms-based Workflow, district staff can easily initiate request for hire or termination and employees can submit requests for leave of absence, all with easy-to-setup approval hierarchies, and approval history audit.

### Attendance

Employee leave requests are routed to the appropriate individuals for approval and then posted to the time sheet. Attendance provides flexibility to accrue leave based on years of service, hours worked, or timeframe and it even tracks employee's leave balances and detail information about leave taken.

### Recruitment

Recruitment is a 21<sup>st</sup> century talent acquisition tool that helps you increase the efficiency and effectiveness of your school district's hiring process by automating key tasks, reducing data entry, and maximizing the reach of your job postings. As you seek the most qualified applicants, Recruitment helps districts efficiently manage the process—from the moment the position is

requested through employee on-boarding. This solution helps you decentralize the legwork to hiring managers yet maintain the quality of the recruiting effort and job applicants. And, by extending position control into the process, it assists you with ensuring compliance with district budget controls and state and federal regulations.

### Employee Benefits

Employee Benefits is an easy-to-use, interactive software package that is intended to be run in conjunction with eFinancePLUS Human Resources and eFinancePLUS Financial Accounting Systems. This multi-feature software package enables you to create and maintain records focusing on benefits administration. It complements the benefit processes in HR and Finance. The ability to create and maintain benefit records for processing COBRA information, including related billing and payment data is also provided.

See also Employee Access Center, Personnel Budgeting.

## PAYROLL

### Payroll and Benefits Management

Payroll is fast, efficient, accurate, and versatile enough to handle the complexities of district payrolls. A unique payroll wizard guides personnel step-by-step through the processes of a pay run, timecard entry, calculating and running reports, and more.

### Position Control

Have a clear picture of your budgeted staffing status when reviewing that next hiring request. With our Position Control system you can accurately account for and easily identify all the budgeted positions within your organization, how many full-time equivalents (FTEs) are assigned to positions, and a description of the duties. This will allow you to track through the years, personnel that held these positions and details regarding their job. Position Control provides tight controls on what positions are being hired and moved within the district, enforces and facilitates budget code assignments, and ensures your district operates within its budget.

### Salary Projections

Quickly assess the impact of labor proposals. Salary Projections makes it easy to take an existing employee or a group of employees and calculate in percentage, dollar amount, or both, an increase or decrease to those employees' schedule. Comprehensive reports provide you with all the information that you need; the number of employees attached to a schedule, their existing individual and total costs, and the future impact if the increase would be passed on the individual line item and total budget. Easily identify your bottom line costs during this period and re-run those calculations as many times as you need until you come to an agreement. Easily carry an approved schedule over into the payroll process to start the next cycle with a new schedule.

## Employee Timesheets

Employee Timesheets allows employees to record their time and provides an interface for clocking in and out. Time entered is verified through the approval process. Once approved, the timesheet information feeds into the payroll process.

## TOOLS

[Human Resources, Finance & Payroll](#)

### Workflow

Workflow manages the routing of requisitions, purchase orders, and change orders through the approval process, notifying the requester as progress is made. The approval process is also supported for accounts payable, budget adjustments, and budget transfers. The approval path can be defined based on the department, account code, and dollar amount.

### Current Federal Requirements:

- [Federal 941 Report](#)
- [Financial Report Writer](#)
- [1099-Misc Reporting](#)
- [W2 Processing](#)
- [EEO5 Report](#)
- [ACA Healthcare 1095-C Processing](#)

(Please contact your PowerSchool Vermont Team for the most up-to-date reports.)

### Standard Reports

The PLUS 360 applications provide you with hundreds of out-of-the-box reports. Simply select which report you need and our print wizard allows you to specify the reporting criteria, sort options, and whether you want to view the report online, send to a printer, or save as a .pdf to send as an email attachment. An online status bar shows progress of the report as it is executing

### Cognos Reporting

The PLUS 360 application also integrates with Cognos reporting tools, which provide end users with extremely intuitive query and report writing capabilities. It also provides technology staff with the ability to develop more extensive and complex reports when needed. Easily and quickly create any query or report through point and click processes. All the PLUS 360 database fields are presented to the end user in easy-to-understand language. An exhaustive list of selection capabilities, filtering options, sorting features, and calculation types allow users to create any simple list or complex report. Reports can be presented as tabular lists or quickly converted to graphical displays such as pie charts, bar graphs, or trend lines, or all the above. They can also be output in a variety of formats including .pdf, .html, Excel, Word, or ASCII files. Reports can be deployed over the web and scheduled to run on specific dates and times to give staff quick access to the information they need, when they need it.

### Schools Interoperability Framework (SIF) Agent

The School Interoperability Framework Agent allows the district to create a seamless interface to third-party products.

### LearningPLUS

Designed with the end-user in mind, LearningPLUS helps districts maximize with assignable and customizable job-embedded learning opportunities. It provides real-time, unlimited learning content whenever the user needs a refresher – right from within eFinancePLUS. Mitigate the risk of implementation with just-in-time training while an employee is in the application. Up-to-date content from PowerSchool developed for a variety of learning styles assures that all users build capacity in the platform while reducing costly cross-training strategies.

## EMPLOYEE MANAGEMENT

### Employee Access Center

provide employees with anytime, anywhere access to their payroll and personnel information through this convenient web portal. Define what information can be viewed—demographics, benefit statements, benefit enrollment, attendance history, deduction/benefit history, payroll checks, certifications, and skills. Allow employees to update specific personal information and route those changes to appropriate personnel for review and approval. (i.e. demographics, benefit statements, benefit enrollment, attendance history, deduction/benefit history, payroll checks, certifications and skills.)

- **Demographics:** Display address and contact information for employees to easily review and change. Security prevents items, such as social security number and birthdates, from being adjusted, but dependent and tax information can be changed as well as any demographic information when an employee's lifestyle changes. You can also create hyperlinks to websites such as the IRS to download forms that need to be filled out and signed for tax purposes. Benefit Statements provide your employees with an up-to-date picture of their total benefits and salary information, including employer contributions. The information is clearly displayed on a pie chart, along with a detail listing that can be printed.
- **Benefit Enrollment:** Share an online list of available benefits with your employees for their annual selection. They can also link to the provider's websites for more details. Employees can choose their benefits, and payroll staff would need to just review and update.
- **Attendance History:** Through an easy to read graphical calendar display, employees can quickly see their leave time. Each leave day is color coded based on type. A tabular chart shows remaining leave balances. Employees can also request leave time through a simple web form, which is automatically routed to the appropriate individuals for approval.
- **Deduction/Benefit History:** Summary and detail information for an employee's year-to-date deductions and benefits are listed. Employees can easily view monthly, quarterly, fiscal, calendar, and inception-to-date totals, and they can review and print all past paycheck details.
- **W2 Forms:** Automatically make .pdfs of employee W2s available for viewing and printing, helping to relieve district staff from the burden. Past years' W2 forms also remain available to the employee for as long as they have worked for your district.
- **Certifications and Skills:** Employees can review and track their certifications, degrees, and job skills, including any renewal or expiration dates.
- **"What If" Paycheck Simulator:** Allows an employee the ability to simulate pay check based on hypothetical pay or deduction changes.

- **Direct Deposit Management:** Allows employees to manage direct deposit deductions by adding, changing or inactivating.
- **Race Ethnicity Verification:** An option to allow employees to designate race and ethnicity while conforming to EEO requirements.

### Professional Development

Decentralize and manage your staff’s Professional Development. The solution covers course catalog requests, employee and external participant registration, wait listing, instructor grading, and HR integration. Professional Development increases your service levels to employees and reduces administrative workload.

### Employee App (Mobile Connector and Employee Module)

Save time and increase engagement with the Mobile Employee App. Designed to meet today’s users in their world, the employee app allows the District to provide useful links and communications while giving on-the-go access for employees to check deductions and benefits, submit leave requests, see their pay, deductions, direct deposits and much more.

	Home. Displays district news, resources, notifications, and quick links to submit a leave request, view the user's last paycheck, and review profile.
	Deductions & Benefits. Displays deductions and benefits information. Allows the user to enter a new direct deposit deduction.
	Employee Directory. Displays the Employee Directory for the district.
	Leave. Displays the Leave Banks. Allows users to add a new leave request. Allows users to view leave in a monthly calendar form.
	News. Displays the district's news.
	Notifications. Displays PLUS 360 alerts with an indicator of unread notifications.
	Paycheck History. Displays the user's paycheck history for dates specified by the district.
	Profile. View and make changes to the user's contact information, emergency contacts, and physician information. Set electronic consent for W2 and 1095-C forms.
	Resources. Displays links to other resources the district determines may be helpful.
	Salary & Benefits. Displays the user's salary and benefits information. Display-only.
	Tax Withholdings. Displays the user's federal, state, and local tax information. Display-only.
	W2. Displays PDFs of current and past year W2s for years specified by the district.
	Change Password. Allows the user to enter a new password. (Only available if the district is not using Active Directory.)
	Logout. Logs the user out of the app and returns them to the Login screen.