

*iSYS*Works For Me User Conference 2023*



*Intelligent SYstem Solutions
Human Resource/Payroll/Integration for
Ontario School Boards*

www.isysworks.com

November 21st to 23rd, 2023

**Hilton Garden Inn
985 Syscon Road
Burlington, Ontario
L7L 5S3**

Telephone 905-631-7000

Agenda At a Glance

	Tues, Nov 21 A	Tues, Nov 21 B	Wed, Nov 22 A	Wed, Nov 22 B	Thurs, Nov 23 A	Thurs, Nov 23 B
8:00 – 8:30			<i>Hot Buffet Breakfast</i>		<i>Hot Buffet Breakfast</i>	
8:30 – 9:00	<i>Registration/Breakfast</i>		<i>Welcome</i>		<i>Welcome</i>	
9:00 – 9:10			Ontario Teachers Pension Plan – Multiple Line PBR (Payroll Based Reporting)	iSYS Corp – The Ad Hoc Reporter	HRPLINK – Security Best Practices	iSYS Corp – Data Flow HR – Payroll – Finance
9:30 – 10:00					HRPLINK iSYS*Pay – Verification and Audit	
10:00 – 10:15			Opening and Welcome	<i>Break</i>	HRPLINK iSYS*Pay – Functionality (of which you may not be aware!)	
10:15 – 10:30	iSYS Corp – Keynote	SERVICE CANADA /iSYS*Pay Team – CRA Payroll	SYS Corp – The Ad Hoc Reporter – cont'd	<i>Break</i>		
10:30 – 10:45	“Giving Back”			The iSYS*Works Future		
10:45 – 11:00	Angela Hodgson, HPCDSB	OMERS – NFT Update	Follow Up – iSYS*Pay Team – OMERS Yr End Report	Summary Wrap Up		
11:00 – 11:15	iSYS*Works - A New User Perspective			<i>Garden Deli Lunch</i>		
11:15 – 11:30	iSYS Corp - The IWAC Mandate (iSYS*Works Advisory Committee)			<i>Take out boxes provided</i>		
11:30 – 12:00	<i>Lunch</i>		<i>Lunch</i>	<p>iSYS*Works For Me User Conference 2023</p> <p>November 21st to November 23rd, 2023</p> <p>Hilton Garden Inn</p> <p>985 Syscon Road</p> <p>Burlington, ON</p> <p>905-631-7000</p>		
12:00 – 12:15						
12:15 – 1:00						
1:00 – 1:15						
1:15 – 1:30	iSYS*OnBoard STO Days	iSYS Corp – iSYS*OnBoard Pension Subsystem				
1:30 – 1:45	Euna Solutions (Questica Budgeting Software) – iSYS*Works Interface	Apply To Education – “Making the Switch”				
1:45 – 2:45	<i>Break</i>		<i>Break</i>			
2:45 – 3:00	iSYS Corp – Payroll Specifics and Payroll Open Forum	iSYS Corp – HR Open Forum	iSYS Corp & HRPLINK Open Discussion Forum			
3:00 – 4:15			Bar Opens			
6:00 – 6:30	<i>Meet the Techies</i> Bar Opens					
6:30 – 10:00	<i>Casual Buffet Dinner/Bar - Live Band</i> Kenny “Blues Boss” Wayne		<i>Semi Formal Dinner</i> Murder/Mystery Show			

CONFERENCE SESSIONS

TUESDAY, November 21st

10:15 to 10:45 iSYS Corp – Keynote – “Giving Back”

Presented by: Christine Clutterbuck

- In 2014 we started a tradition whereby we opt to donate money to our boards in support of their sponsored charity in lieu of contracting a keynote speaker
- To be eligible, an individual from each board represented at the conference will present a summary of their charity’s endeavours
- The person giving the presentation on behalf of the board’s charity will inform us of such by stating the charity on the conference registration form

10:45 to 11:15 iSYS*Works – A New User Perspective

Presented by: Angela Hodgson, Executive Manager of Employee Relations
Huron Perth Catholic District School Board

- Angela will speak to her perspective coming from outside of education, using a different system and how it compares to using and obtaining data from iSYS*Works

11:15 to 12:00 iSYS Corp - The IWAC Mandate (iSYS*Works Advisory Committee)

Presented by: Christine Clutterbuck

- **“To bring together iSYS*Works users and iSYS to develop, share and promote best practices and new ideas”**
- Current IWAC members and IWAC executive.
- Nomination and election process for IWAC executive.
- Frequency and location of IWAC meetings.
- Fostering formal communications between the IWAC and partners in education including but not limited to OCT, TPP, OMERS, Ministry of Education and SBCI.
- Communication of iSYS*Works users at each board with their respective IWAC members to have their ideas brought forward for discussion.
- Types of information that could be shared between IWAC members.
- The process of IWAC request adjudication – how the request is submitted; who adjudicates and how the request is adjudicated

Tuesday, November 21st cont'd

11:15 to 12:00 **iSYS Corp - The IWAC Mandate (iSYS*Works Advisory Committee) cont'd**

- Determination of enhancement within an upgrade covered by existing license fees; development at extra cost shared among boards; or a board customization.
- Existing Requests for Enhancements

1:00 to 1:45 **iSYS Corp – iSYS*OnBoard STO Days**

Presented by: David Smith, iSYS Corp

- New OnBoard Offering
- Currently in place at HDSB and WCDSB
- Captures STO (Short Term Occasional) Days for Grid Experience Purposes

1:45 to 2:45 **Euna Solutions (Questica Budgeting Software) – iSYS*Works Interface**

Presented by: Mike Sullivan, Senior Account Executive & Danny Benjamin, Project Manager

- Questica, a Canadian success story under Euna Solutions, has been delivering budgeting solutions tailored to the public sector for over 25 years. Over this period, Questica has meticulously crafted software tools that cater to the distinctive demands of public sector budgeting, particularly for K12 budget teams. In their session, Mike and Danny will offer a comprehensive overview and present practical examples of how K12 budget teams are leveraging the Questica Budget platform to enhance and streamline their budgeting processes.
- Three iSYS*Works boards use Questica Budgeting Software
- iSYS provides a finance reporting tool to assist with the passing of data from iSYS*Works/iSYS*Pay to the Questica system

CONCURRENT SESSIONS TUESDAY AFTERNOON

3:00 to 4:15 iSYS Corp – Payroll Specifics and Payroll Open Forum

Moderator: David Smith

- Payroll Cycles
- iSYS*Pay Admin Configuration
- Maximum utilization of the Preview reports
- Deferred Salary Leave best practice
- Creating and Requesting new UPE's
- Discussion areas per audience requests

3:00 to 4:15 iSYS Corp – HR Open Forum

Moderator: Christine Clutterbuck

- Mariah Huehnergard, AMDSB – Potential to use the ESS Portal to accommodate the collection of information required for the “New Hire Package”
- Integration/Interface of 3rd Party Staffing Tools and iSYS*Works data
- iSYS*Works Security Refresh
- Discussion areas per audience requests

Entertainment and Social

- 6:00 pm Tuesday Night*
- *Meet the Techies*
 - *Casual Buffet Dinner/Bar*
 - *Live Band – Kenny “Blues Boss” Wayne and his Blues Band*

WEDNESDAY, November 22nd

9:00 to 10:00 Ontario Teachers Pension Plan – Multiple Line PBR

Presented by: Rachel Saywack-Rosset, Account Manager Coordinator
Christopher Marroquin, Theo Blanchard, Team Coordinators
Sherwin Cua and Darren Valladeres, iSYS*Pay Team

- In November of 2022, OTPP, iSYS*Corp and HRPLINK held a workshop in Thunder Bay for the northern iSYS*Works boards regarding the availability of a new PBR (Payroll Based Reporting) file providing for multiple lines for employees who have more than one rate of pay
- The new PBR will be explained and how it assists in resolving errors as a result of different rates of pay for a single individual
- Theo will speak to the Stewardship reports

10:15 to 11:15 SERVICE CANADA/iSYS*Pay Team – CRA Payroll

Presented by: Mona Jovetic, Citizen Services Specialist (CSS for short) with Service Canada and the iSYS*Pay Team

- Record Of Employment Clarifications/Considerations
- iSYS*Pay Impact and Implementation strategy for second tier CPP
- Management and Implementation of the new CPP Second Tier
- New T4 Boxes – CPP (2024) and Dental Premiums (2023)

On Wednesday morning, concurrent with the OTTP & Service Canada sessions above, the following session will be offered. To participate, users must come prepared with an iSYS*Works test environment; iSYS*Works; and that version of MS Access in use at the board, installed on their laptop.

9:15 to 11:15 iSYS Corp – The Ad Hoc Reporter

Presented by: Christine Clutterbuck; Christopher Clutterbuck

- HR Ad-Hoc Reporting

WEDNESDAY, November 22nd cont'd

11:15 to 12:15 OMERS – NFT Update and Upcoming Changes

Presented by: Kim Uussala, Education and Training Specialist &
Akash Tandon, Pension Education & Relationship Management Lead

- Update on NFT (Non Full Time) uptake and feedback
- Recap on NFT reporting requirements
- Upcoming OMERS changes
- Discovery stages of OMERS PBR

iSYS*Pay Team – OMERS Follow Up

- OMERS Year End Report – 119

1:15 to 1:45 iSYS Corp – iSYS*OnBoard Pension Subsystem

Presented by: Christine Clutterbuck & David Smith, iSYS Corp

- New OnBoard Offering
- Delineates an employee's Pension Lifecycle
- Will provide the Batch file uploads of the OMERS forms

1:45 to 2:45 Apply To Education – “Making the Switch to Easy Connect”

Presented by: Ann Kenny, Account Manager and Client Solutions &
Mark Laurie, President, ApplyToEducation

- Four iSYS*Works boards now use ATE Easy Connect for their Absence/Replacement functionality
- Waterloo Catholic has just converted with Brant Haldimand Norfolk Catholic about to convert with the indication of more to follow
- Mark and Ann will detail how iSYS*Works made it easy to switch and the reasons so many School Boards are doing so.

THURSDAY, November 23rd

9:00 – 9:30 HRPLINK – Security Best Practices

Presented by: Darren Valladeres, HRPLink

- Phishing
- IP address lock out
- Board audit of authorized users
- Saving Passwords
- Microsoft Azure Single Sign On

9:30 to 10:00 HRPLINK iSYS*Pay – Verification and Audit

Presented by: HRPLink

- “Un-finalizing” a Pay or Removing the Finalization Status
- Deleting a Bank File
- Requesting Repayments
- Minimum Pay Dates
- Timesheet Date Parameters
- Memo entry on Process ID entries

10:15 to 10:45 HRPLINK iSYS*Pay – Functionality (of which you may not be aware!)

Presented by: HRPLink

- Removing Finalization/Deleting a Bank File
- Requesting a Repayment
- Automating a CRA Garnishment
- History Process Queue
- Calc Register Change Report

THURSDAY, November 23rd cont'd

On Thursday morning the above HRPLINK iSYS*Pay sessions will run consecutively. While these sessions are running we will have a concurrently running session covering Data Flow as noted below.

9:00 to 10:30 iSYS Corp – Data Flow: HR – Payroll – Finance

Presented by: David Smith & Christine Clutterbuck

- Everything you need to know but didn't want to ask!
- The whole story from Model Configuration to the GL Interface
- The importance of the Job Screen and why Job 1 is crucial
- The available OnBoard modules

10:45 to 11:15 iSYS Corp – The iSYS*Works Future

Presented by Christine Clutterbuck & David Smith

- Where do we go from here?
- iSYS*Works on the web

11:15 Summary Wrap Up, Presentation of Charity Donations, Lunch

Take-Away Lunch Boxes will also be available

All events take place at the Hilton Garden Inn