

Building Confidence in Change: A Cooperative Approach to Skyward Data Migrations

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C·E·S·A 10
Cooperative Educational Service Agency

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OUR JOURNEY

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EMPLOYEE ACCESS





OUR JOURNEY

- What is CESA 10?
- Our migration history
  - Full migration with Skyward
  - Manual migration with Skyward
  - Manual migration with CESA 5

GENERAL THOUGHTS



- Review current processes/procedures
- Determine staff capacity for the migration
- PROOF PROOF PROOF
- Call your neighbor to ask what they've done

HISTORICAL CONSIDERATIONS

- How much data do you need available in the software?
- How do you want to be able to access the data that is not in the software?
- Record retention requirements to consider?

MODULE OPTIONS

- What do you need?
- How do others use it?
- What can simplify and make your life more efficient?

DATABASE CLEANUP



VENDORS



ACCOUNT LIST



RECONCILIATION



SECURITY

- Who is in charge of assigning security?
- Who should have access to what?

EMPLOYEE HANDBOOK



- Wage Schedules
- Payroll Schedules
- School Calendar Days
- Benefits
- Time Off
- Timesheet Requirements

PAYROLL



PAY TYPES



BENEFITS



DEDUCTIONS

A thorough understanding of pay types, benefits, and deduction setup is essential to maintaining payroll accuracy and ensuring compliance with applicable state and federal regulations.

POSITIONS & ASSIGNMENTS

- Start with the end in mind
  - What needs to be reported
  - What drives pay & benefit eligibility
- Positions & Assignments
  - FTE & Pay Structure
  - Calendars/Schedules
  - Retirement Category





POST MIGRATION

- Federal Reporting
  - Quarterly Balancing
  - W2/ACA/1099
- State Reporting
- Time Tracking
- Substitute Tracking
- Time Off
- Online Forms
- Audits
- Reporting

GO LIVE - EMPLOYEE EDUCATION

- Communication and Training
- Test Groups by Employee Category
- Phased Approach
- Staff Kickoff
- Employee Onboarding

EMPLOYEE ACCESS



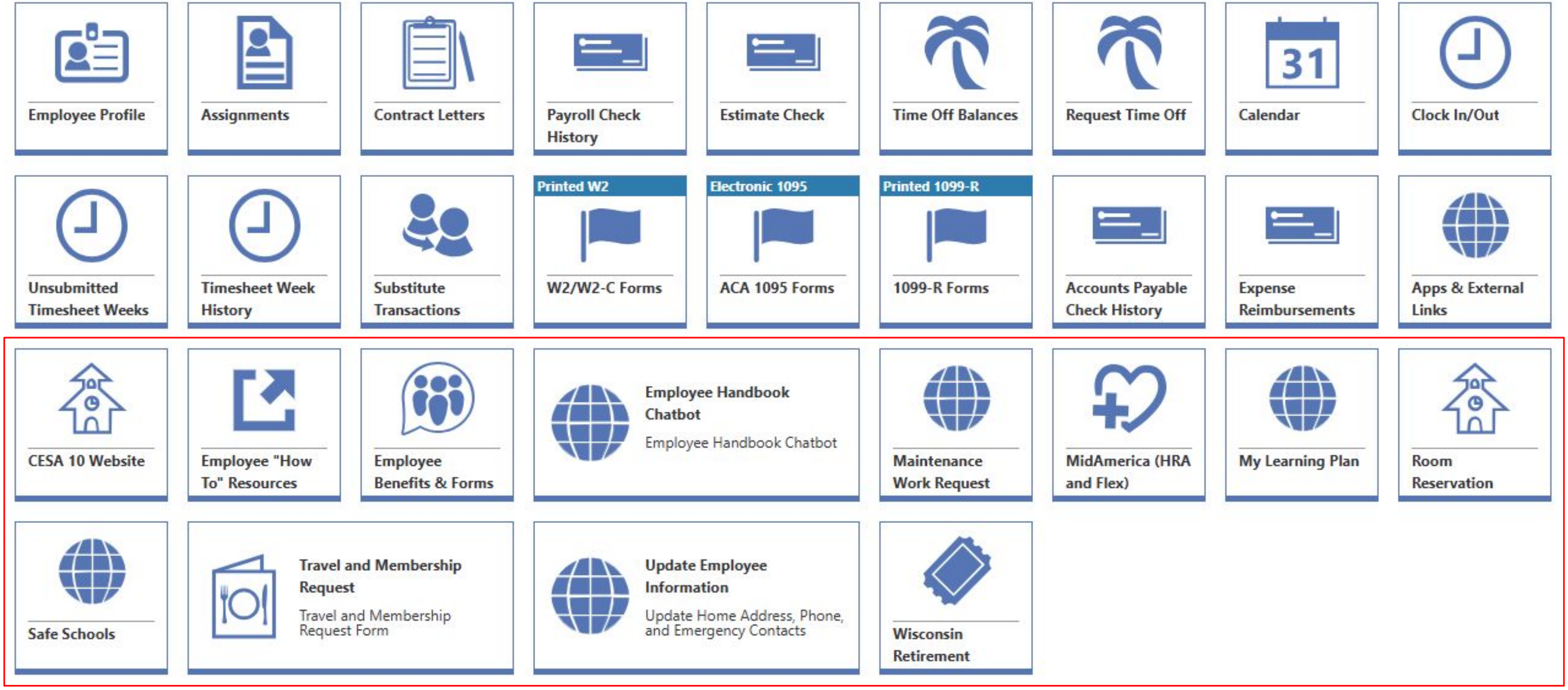
PAY INFORMATION



EXTERNAL LINKS



AI BOT


Employee Profile
Assignments
Contract Letters
Payroll Check History
Estimate Check
Time Off Balances
Request Time Off
31
Calendar
Clock In/Out
Unsubmitted Timesheet Weeks
Timesheet Week History
Substitute Transactions
Printed W2
W2/W2-C Forms
Electronic 1095
ACA 1095 Forms
Printed 1099-R
1099-R Forms
Accounts Payable Check History
Expense Reimbursements
Apps & External Links
CESA 10 Website
Employee "How To" Resources
Employee Benefits & Forms
Employee Handbook Chatbot
Employee Handbook Chatbot
Maintenance Work Request
MidAmerica (HRA and Flex)
My Learning Plan
Room Reservation
Safe Schools
Travel and Membership Request
Travel and Membership Request Form
Update Employee Information
Update Home Address, Phone, and Emergency Contacts
Wisconsin Retirement

QUESTIONS

C·E·S·A 10

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