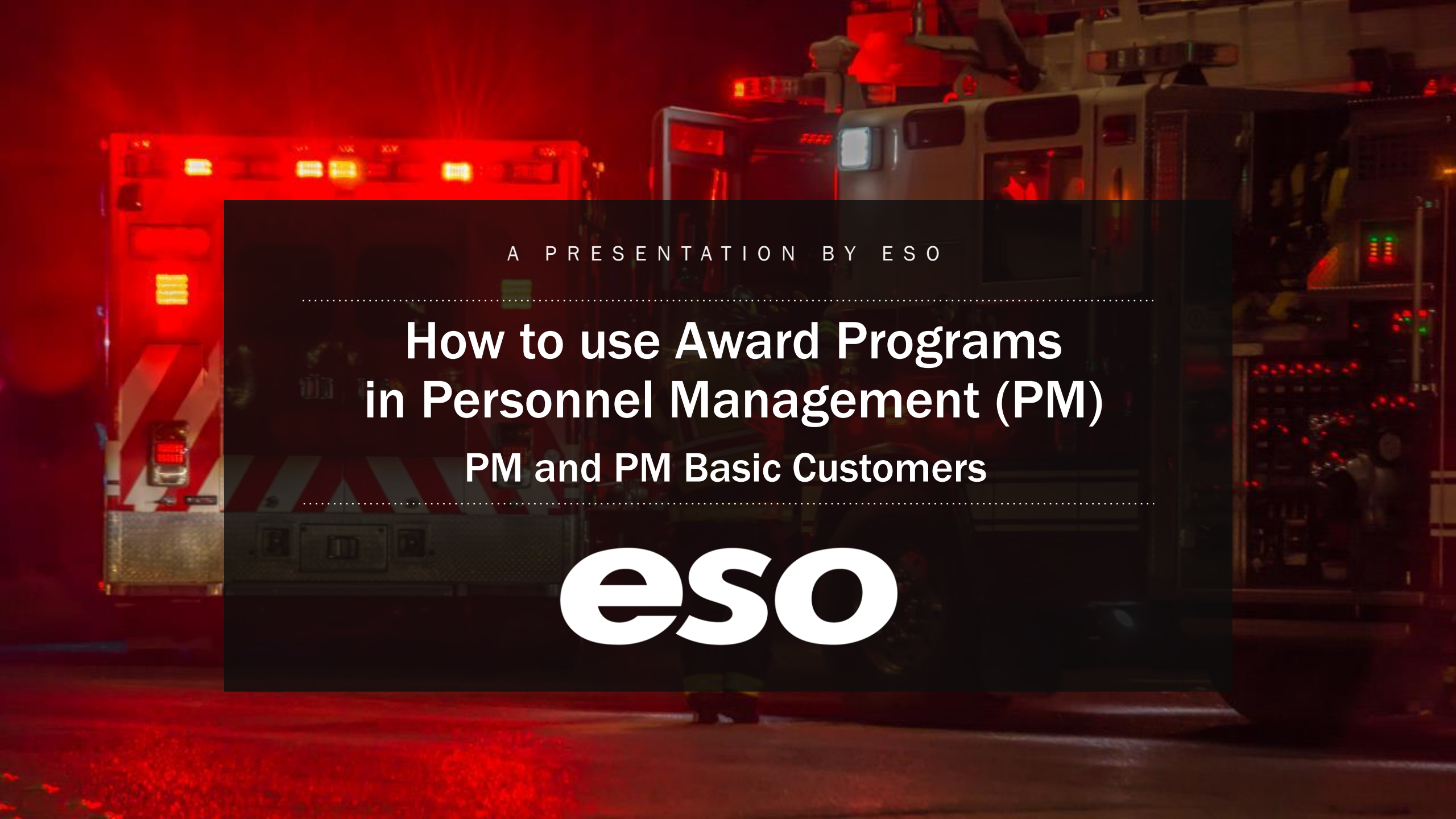

A PRESENTATION BY ESO

How to use Award Programs in Personnel Management (PM)

PM and PM Basic Customers

eso

THE ESO MISSION

Make a Difference

Improve Community Health and Safety
Through the Power of Data

Award Programs

Award Programs can be used for

- LOSAP (Length of Service Award Program)
- Tax abatement programs
- Best practices – calculate the number of credit hours that you want your personnel to achieve in each category every year.
- And more!

Enter data as part of your regular process, and Award Programs automatically picks it up.

Users can look at and print their own award program results – no more running reports*

You set up criteria once, and then only add the participants for each time period.

Information that can be included in calculations now (data is only available for modules purchased)

- Fire and EHR Incidents
- Operational Tasks and Community Events from Activities
- Rank, Title, and Class Credits from Personnel Management

*available for PM customers now, coming for PM Basic customers

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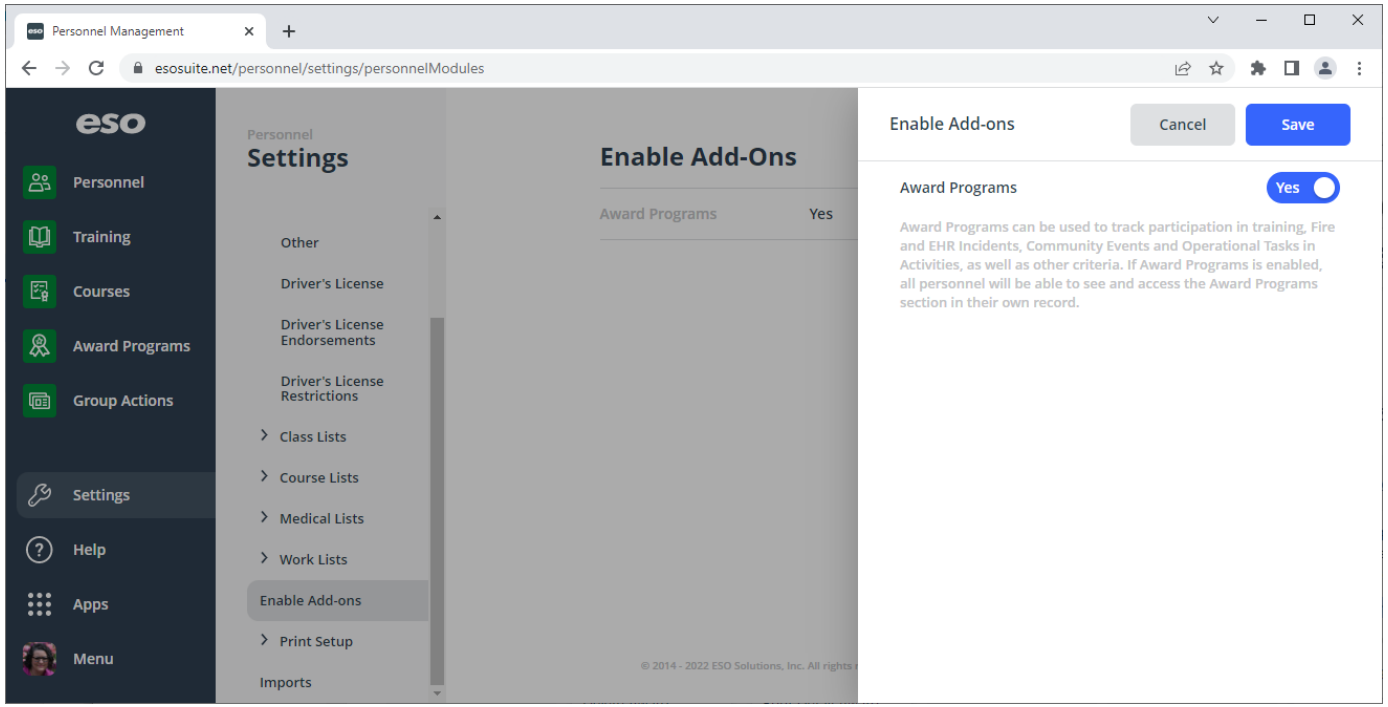
Enable Award Programs from Enable Add-ons

PM users must have the Personnel Admin security permission. That permission is part of the Personnel Management Admin security role.

PM Basic users will have access to Enable Add-ons with no additional security permissions.

1) Go to PM > Settings > Enable Add-ons.
2) Turn on Award Programs and click Save.
3) Refresh the browser window to make the Award Programs section appear.



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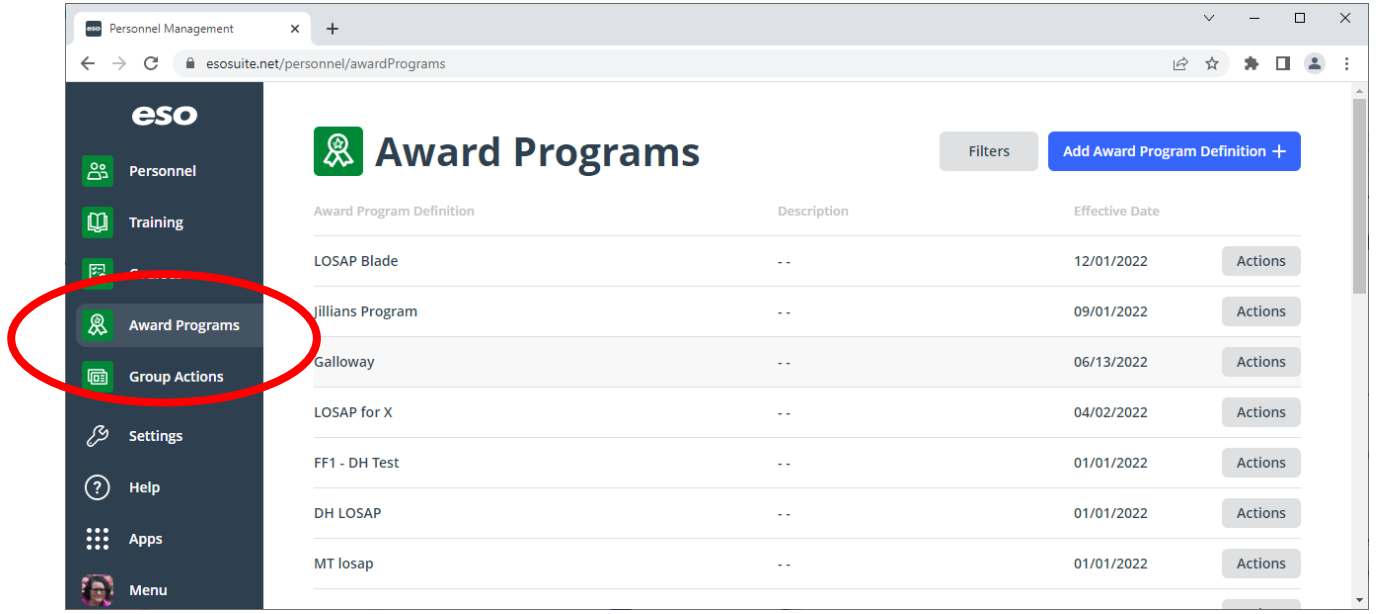
Once Award Programs is Enabled

PM Basic users will need no additional permissions to access Award Programs.

PM users who have the “Edit Award Programs” or “View Award Programs” security permission in one of their security roles are able to see the new Award Programs section.

- The Personnel Management Admin security role includes these permissions.
- You need to add it to any other security roles where the agency wants to grant permission to Award Programs.
- Users with Edit Award Programs can view and make changes.
- Users with View Award Programs can only view the Award Program information.
- A security role needs only one or the other permission.



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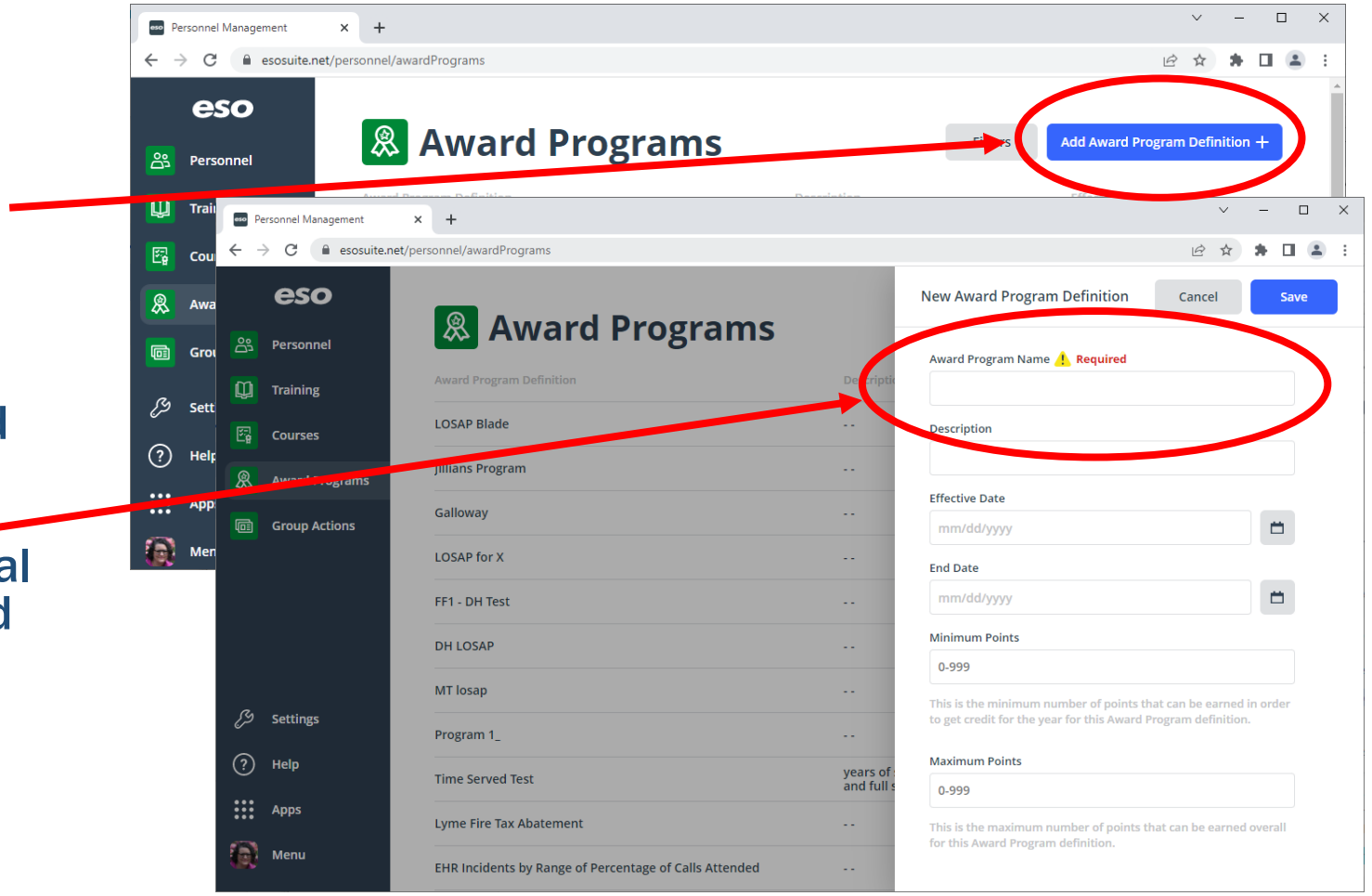
To Create an Award Program

The Award Programs list is blank when you start.

1. Click the Add Award Program Definition button in the top right corner.
2. Add the Award Program name – this is the name you will see in the Award Programs definition list on the first page and is the only required field. The rest of the fields here are optional and can be filled in later in the Award Program Details section.
3. Click Save when you have added all the detail you want.

The Description field contains details about the award program. If populated, the description also appears on the list.



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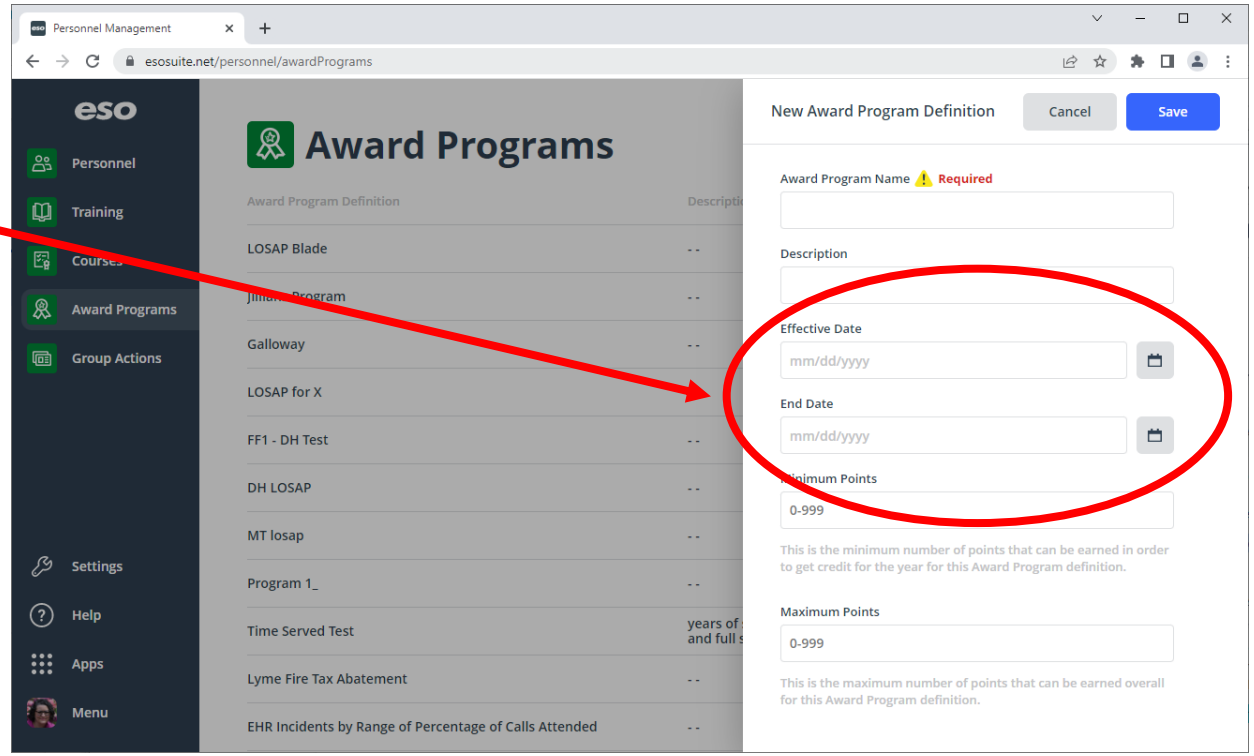
Award Program Effective Dates

The Effective Date indicates when the award program was adopted, such as when the legislation says the program started.

The End Date indicates that the award program is no longer in force.

If the award program criteria changed, add an end date for the current award program definition and add a new award program definition.



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Award Program Minimum and Maximum

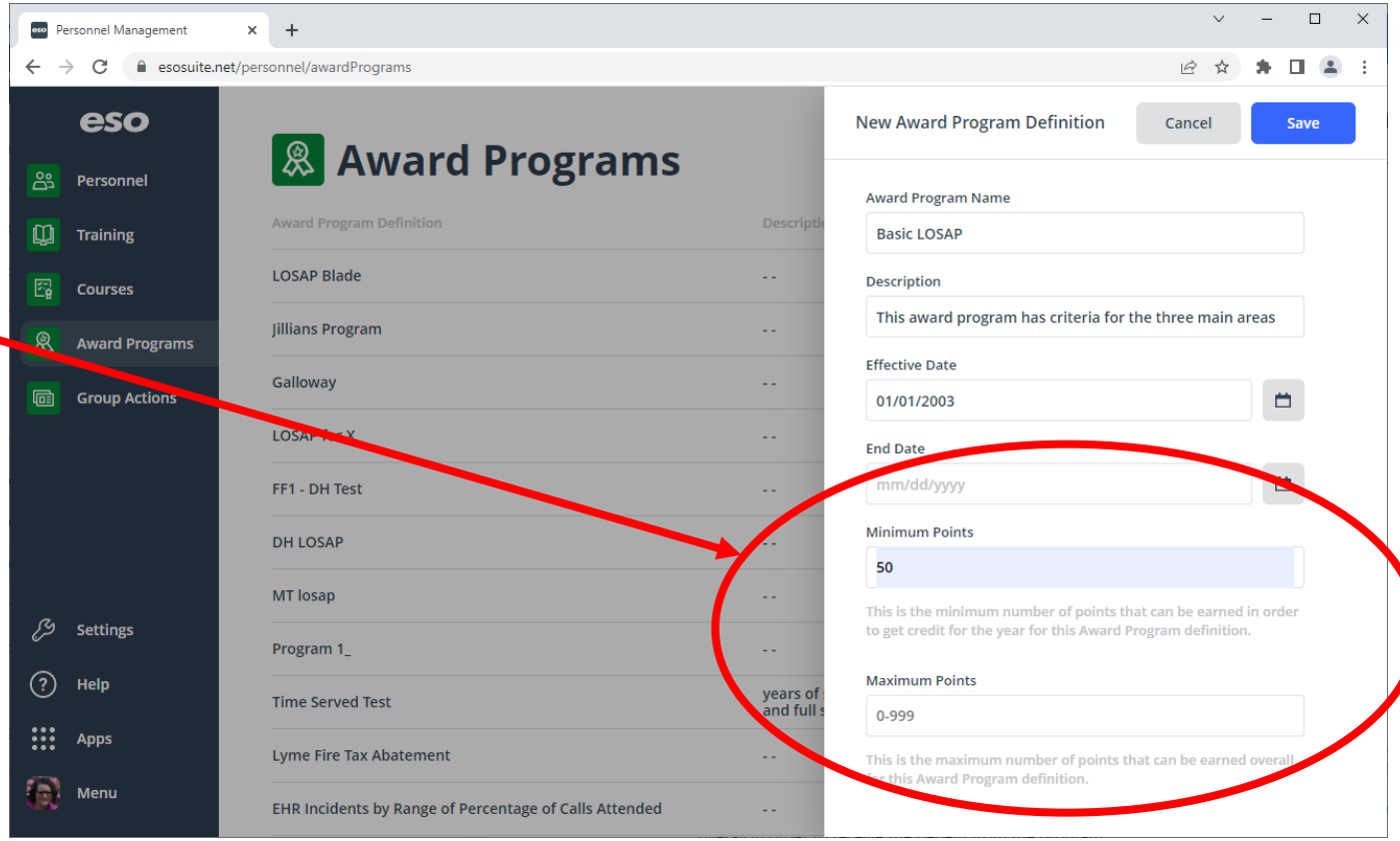
Minimum and Maximum are both optional fields.

If you enter a value for Minimum, then that is the lowest amount of points or hours that the person must earn to receive the benefit from the program.

- If this is populated, it will be used in the calculations to determine if the amount of points or hours earned is enough to get the benefit.

If you enter a value for Maximum, then that is the highest amount of points or hours that the person can earn from the award program.

- If this populated, it will be used in the calculations to determine the total amount earned.



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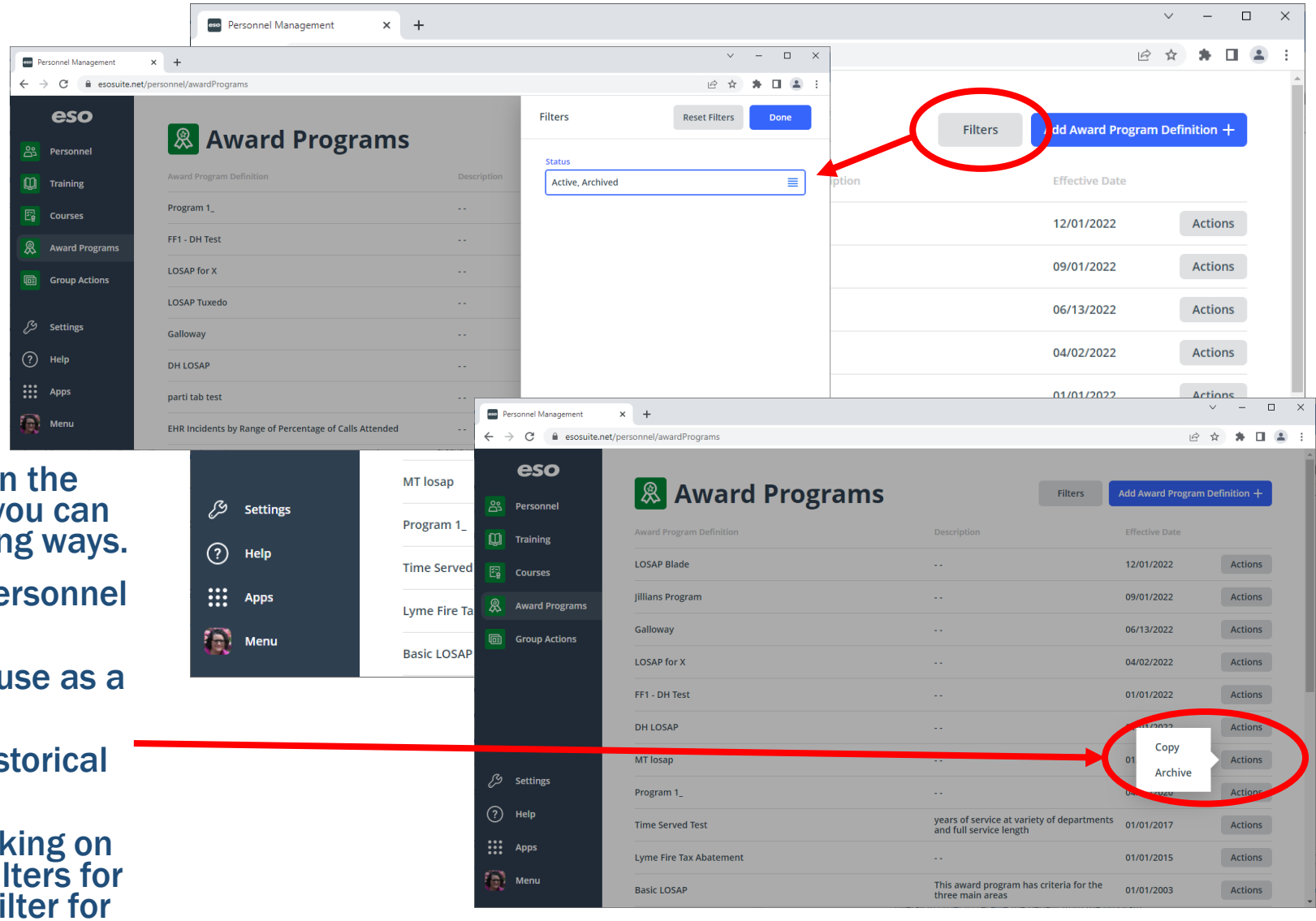
Award Programs list



Once saved, the award program appears in the Award Program definition list. From here you can manage the award program in the following ways.

- Edit the program to add criteria and personnel as participants by clicking on the row.
- Copy the award program definition to use as a basis for other award programs.
- Archive an award program that has historical information but is no longer used.
- Change the list filter as needed by clicking on the Filters button. By default, the list filters for active award programs. You can also filter for archived programs, or for both.

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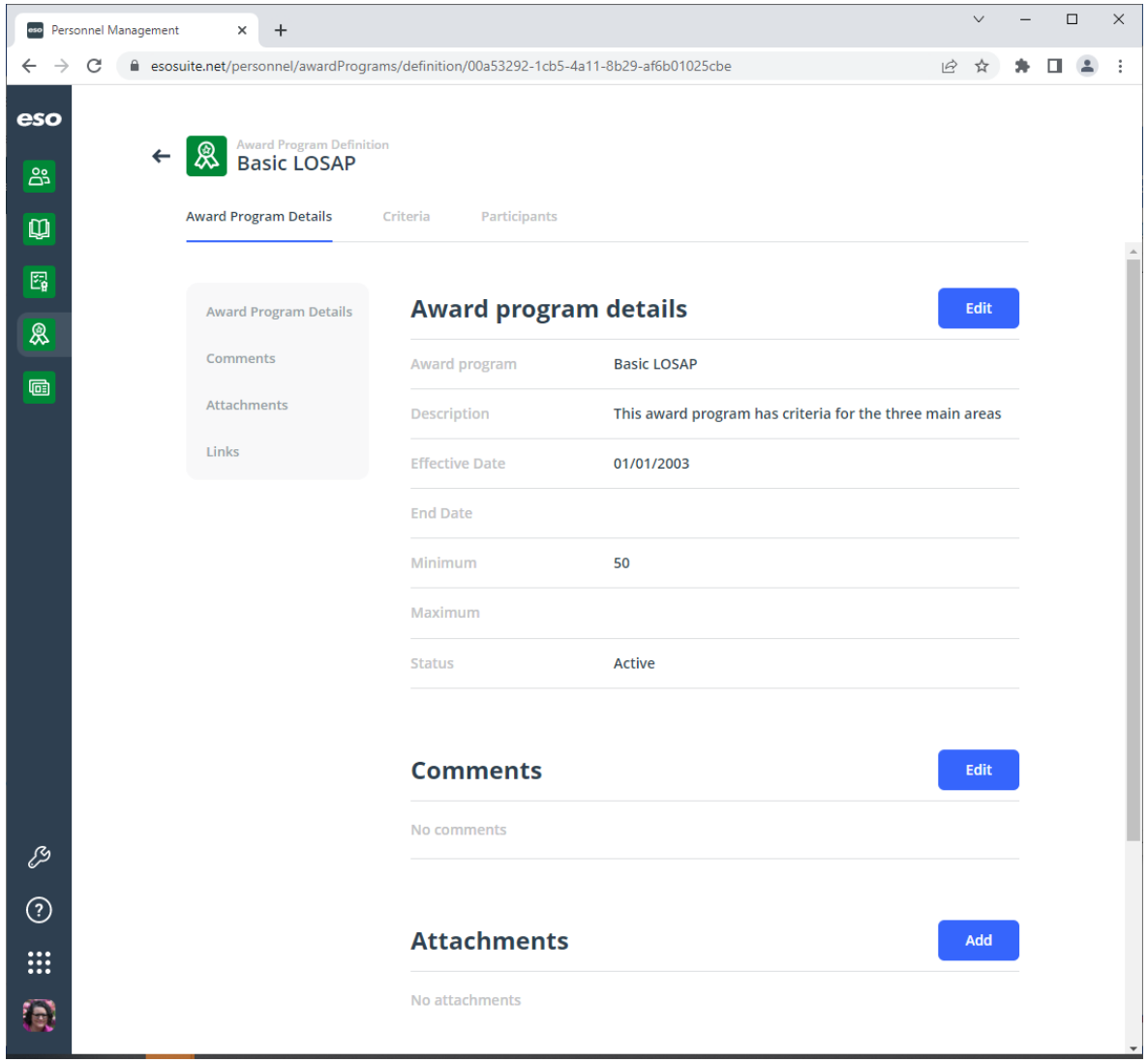
Award Program Details

The “Award program details” section contains information that could be added when creating the award program and the archive status setting.

Comments, Attachments, and Links

- These sections let you add additional documentation for the award program.
- The Comments section is a free-text notes field.
- The Attachments section lets you attach files such as a PDF of the requirements of the program.
- The Links section lets you include URLs for websites, such as a link to the legislation which established the award program.



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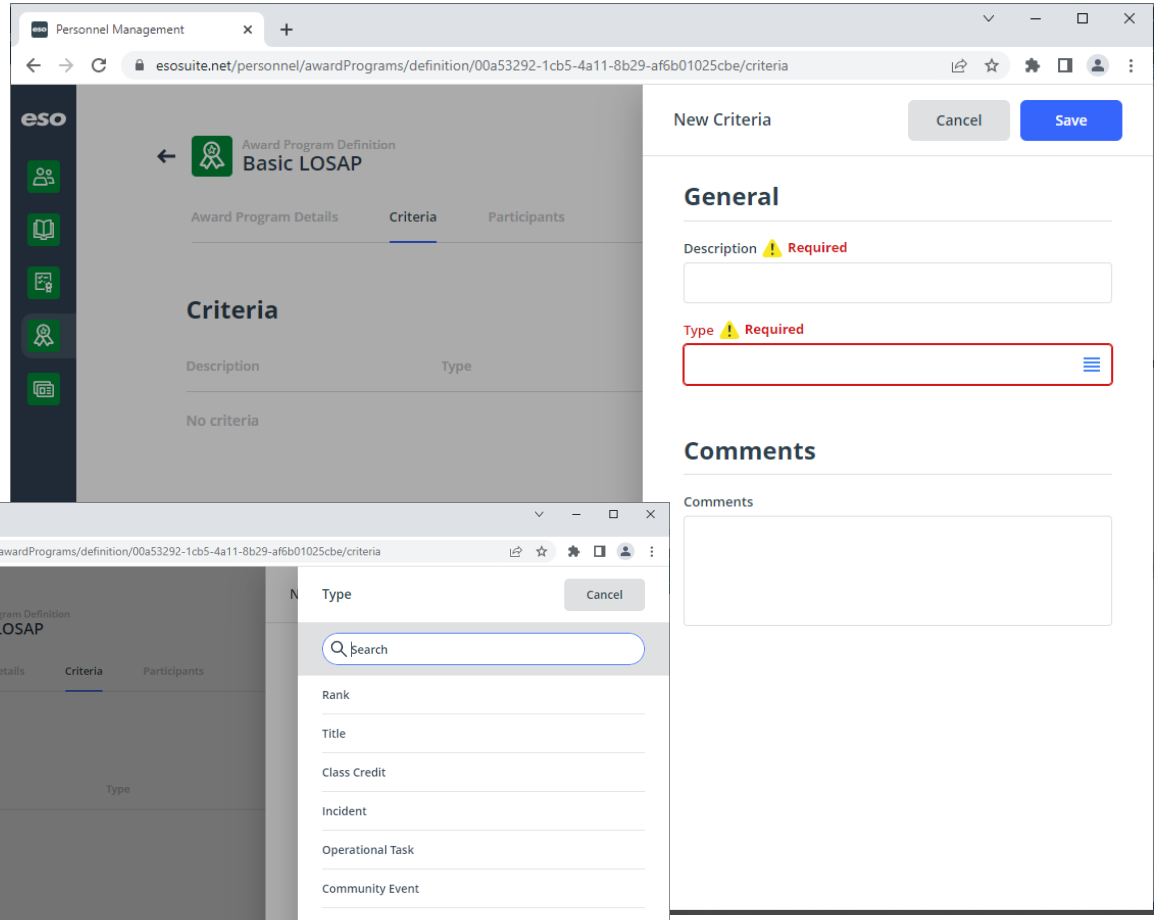
Criteria

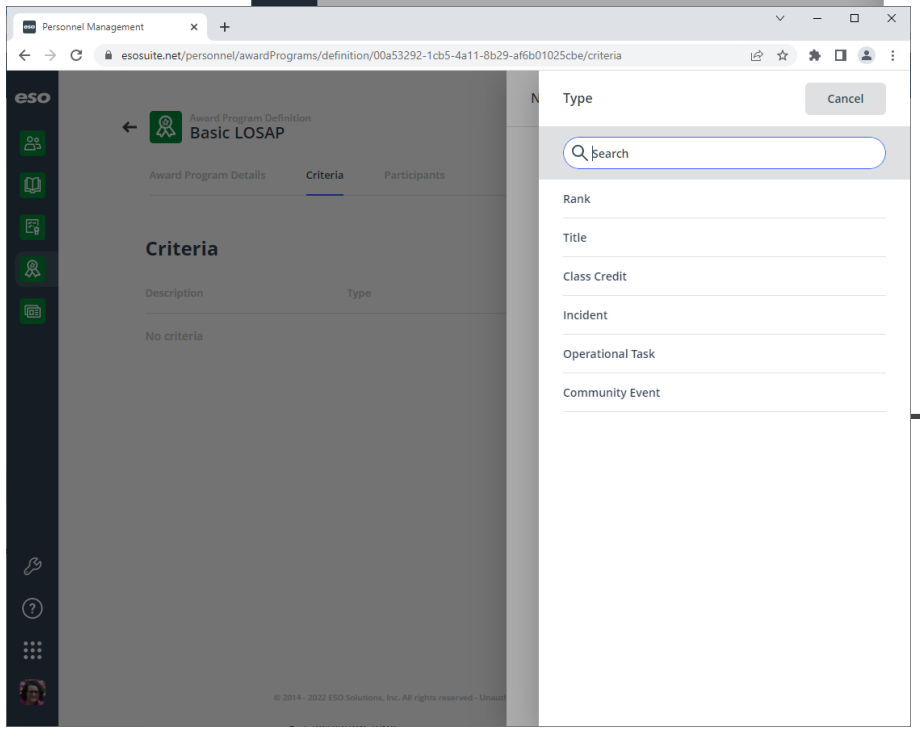
Criteria are the core of the award program. Criteria are the things that need to be satisfied to earn the benefit of the award program.

This is where you set up what it is that you want to calculate.

All criteria types include the following parts:

- Description - Appears in the list of Criteria, in the Calculation Detail, and the print. This corresponds to a category in the award program, such as Meetings, Training, Incident Responses, EMS Responses, Fire Responses, Drills, Position, etc.
- Type - Determines where the award program is getting the information from for the calculation.
  - Rank, Title, Class Credit are from PM, and are only going to work for PM customers.
  - Operational Task and Community Event are from Activities.
  - Incident is from EHR and/or Fire Incidents, depending on if you choose Fire Incident Types, EHR Run Types, or both. Only the options for the modules enabled for the agency appear. If you don't have EHR, then the EHR Run Types does not appear. If you don't have either Fire Incidents or EHR, then the Incident option does not appear.
- Comments – A place to make brief notes about why you set up the criteria a certain way. Any lengthy explanations or documentation of the award program requirements in general should be added as comments, attachments, or links to the Award Program Details section.





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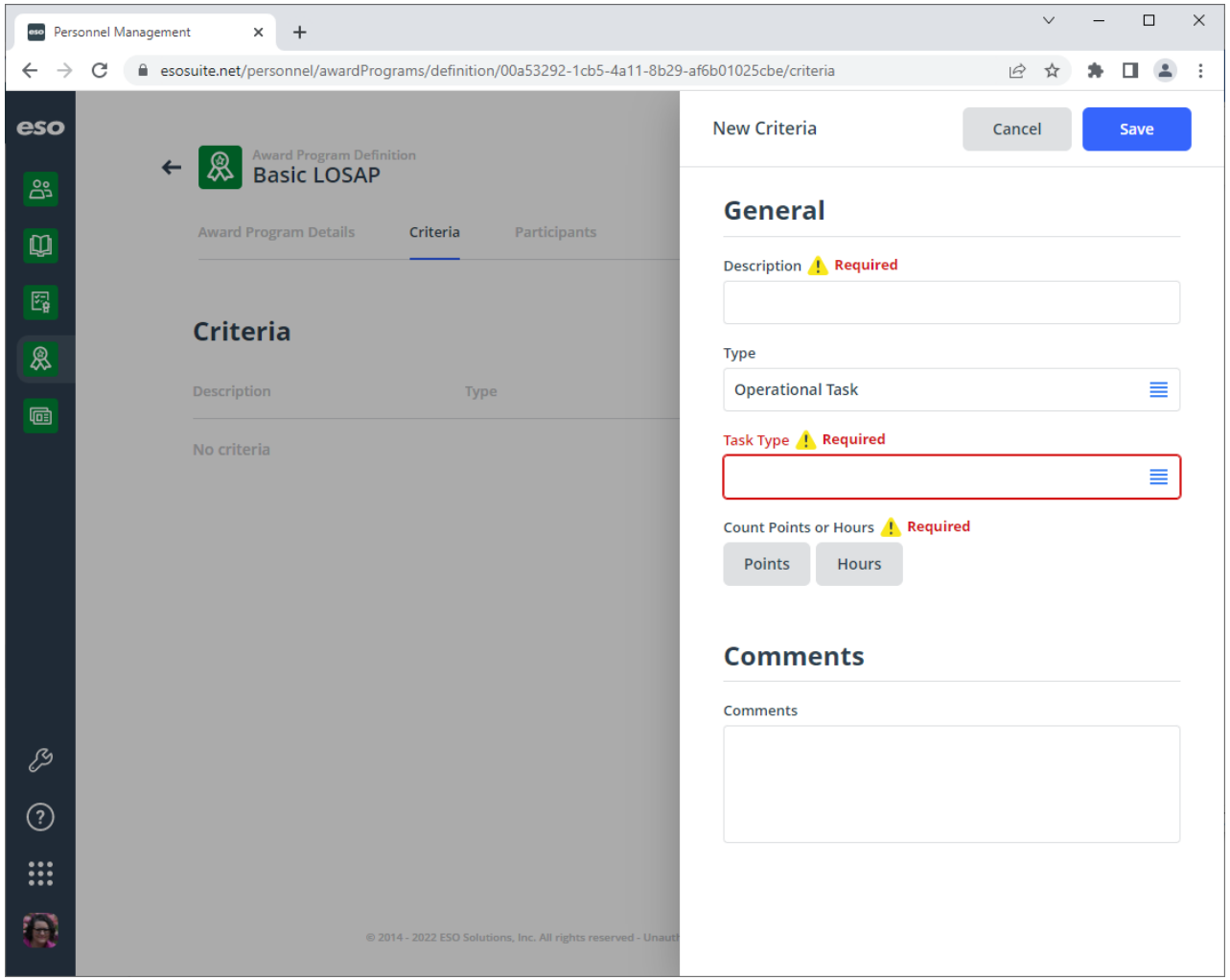
Types of Criteria

What fields appear depend on the type of criteria you select. All types allow multi-select of record types, such as the Task Type in the example to the right.

- Rank – Assign a number of points to each rank in the PM > Settings > Work Lists > Rank. If a person holds that rank during the time frame of the participation period, then the award program uses those points in the calculation.
- Title – Assign a number of points to each title in the PM > Settings > Work Lists > Title. If a person holds that title during the time frame of the participation period, then the award program uses those points in the calculation.
- Class Credit – The Training Credit list is the same Credit list that you set up for Classes or Training in PM > Class Lists > Credits.
  - You can select a single credit or multiple credits that can count toward the calculation.
  - You can select Points or Hours for the calculation.
- Operational Tasks – The Operational Task list is the same one you set up for Task Types in Activities > Settings.
- Community Events – The Community Events list is the same one you set up for Event Types in Activities > Settings.
- Incidents - Incidents do not have points or hours directly entered in the Fire Incidents application. All points and hours are derived through calculations and how the criteria is set.



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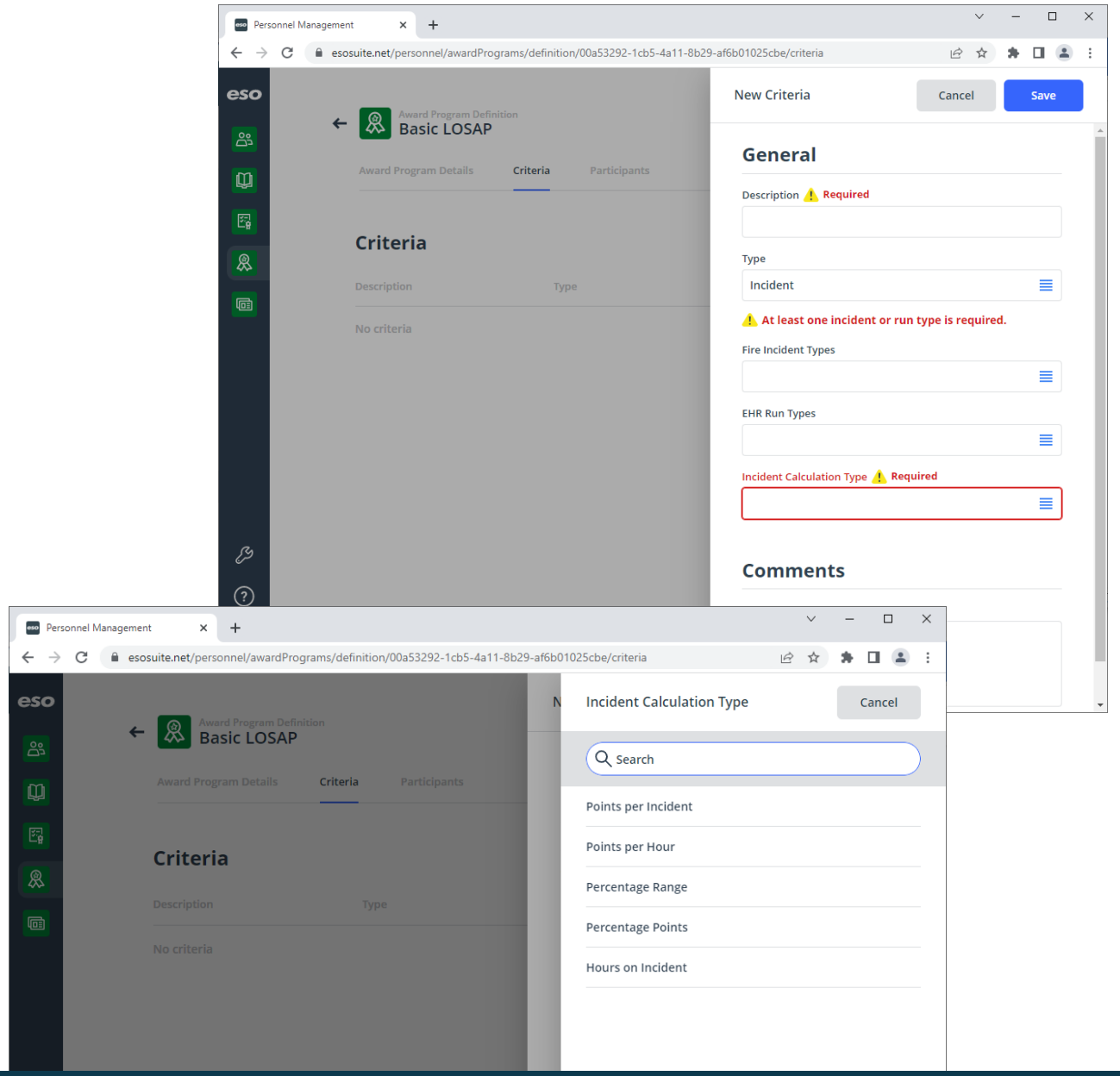
Incident Calculations

There are several types of incident calculations. Depending on how the locality making the rules wrote the award program requirements, one type will be more appropriate than others.

If you are a Fire customer, you may want to use only Fire Incident Types to differentiate between your Fire and EMS runs, if they need to be calculated separately.

- If you choose EHR Run Types, then double-counting may occur.
- In this scenario, you can add the 300 series Fire Incident Types for a Medical Incidents criteria, and all other Fire Incident Types for a Fire Incidents criteria.



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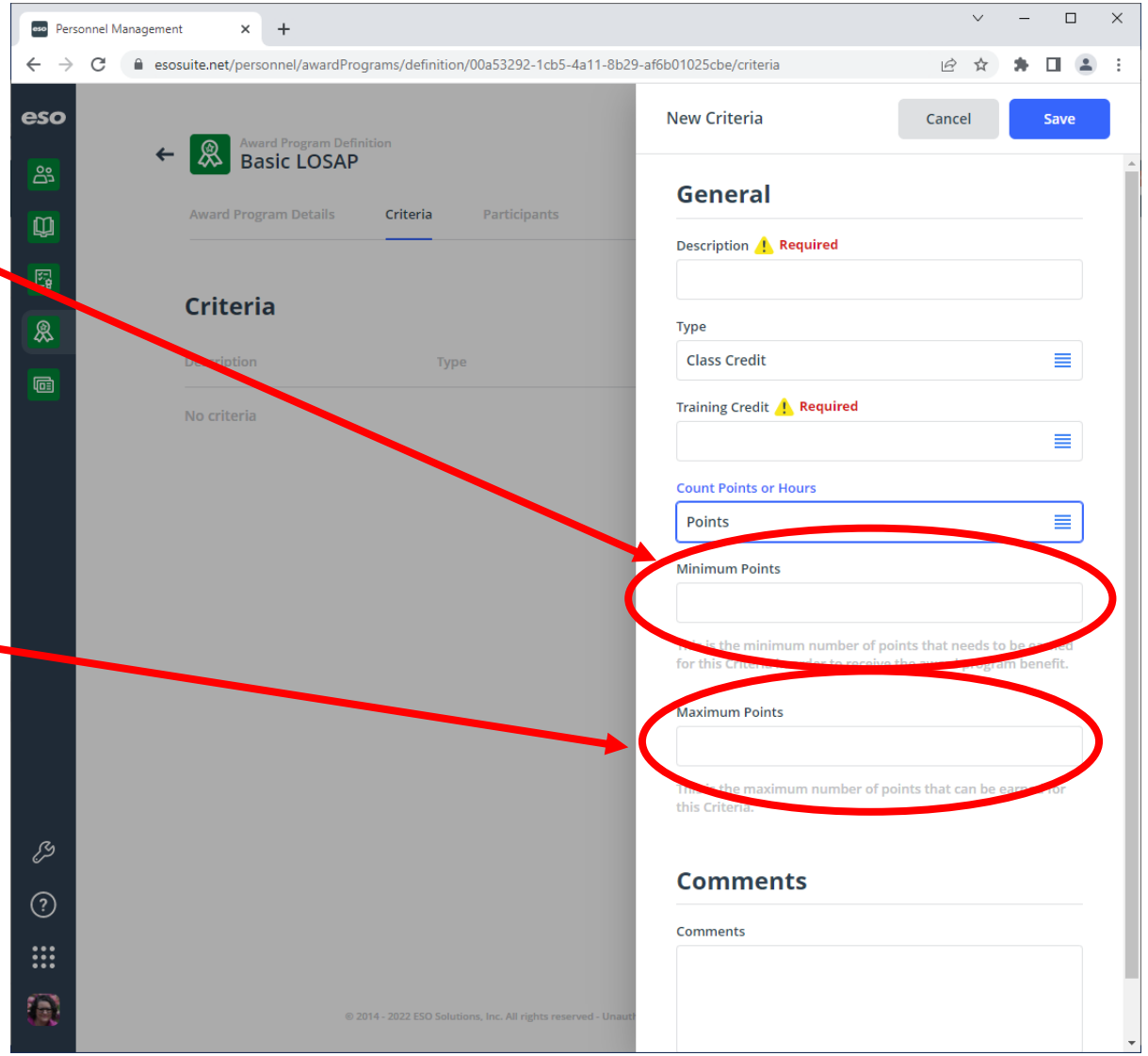
Criteria Minimum and Maximum

Most criteria let you set a minimum number of hours or points required for that criteria.

If you want to see when a criteria is satisfied (green checkmark), you must set a minimum.

Most criteria let you set a maximum number of hours or points allowed for that criteria.

If you set a maximum and it is reached, the award program stops counting additional hours or points.



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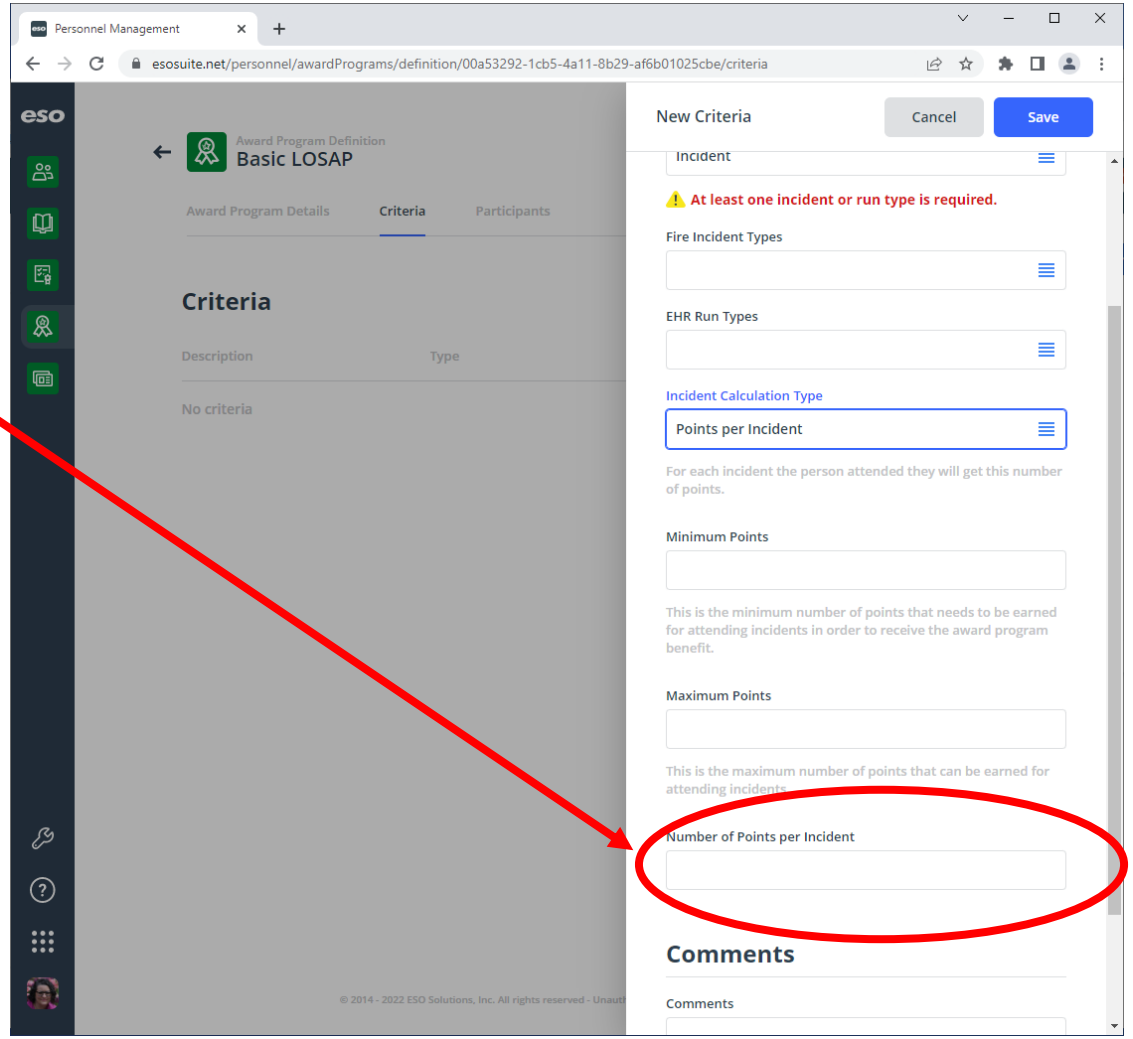
Incident Calculations - Points per Incident

For each incident the person attended, the award program counts the number of points entered in the criteria in the total.

This is good if your agency has a straight-forward point-per-incident calculation, or one where participants get a certain number of points for certain types of incidents, and a different number of points for other types of incidents.

- In this case, there would be one criteria for the incident types that are 2-points-per-incident, and another one for the incident types that are 1-point-per-incident.



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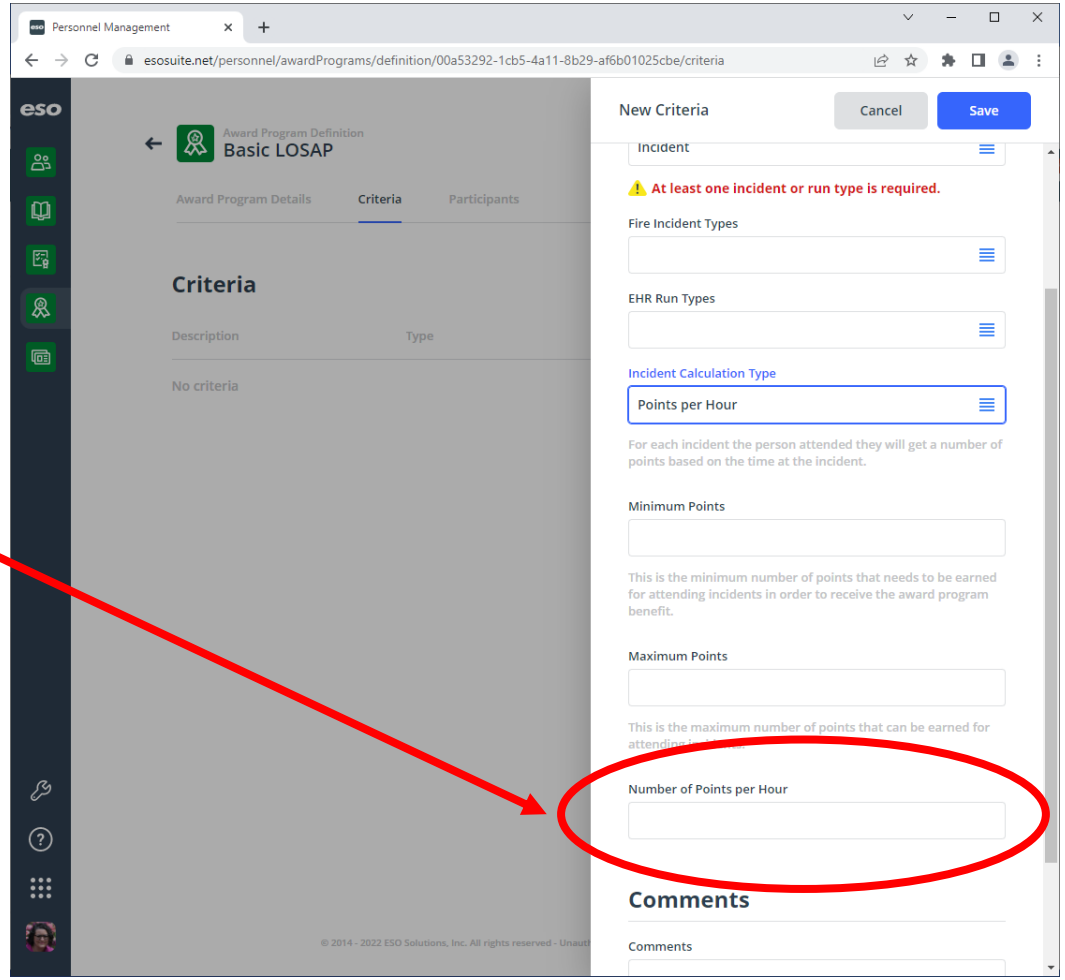
Incident Calculations - Points per Hour

For each hour or fraction of an hour the person attends an incident, the award program multiplies the number of points entered in the criteria by the hours and counts them in the total.

This is good for programs where there is a rule about a certain number of points granted per hour on an incident. You can also use it if you have a straight-forward payment system to calculate payment amounts.



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Incident Calculations – Percentage Range

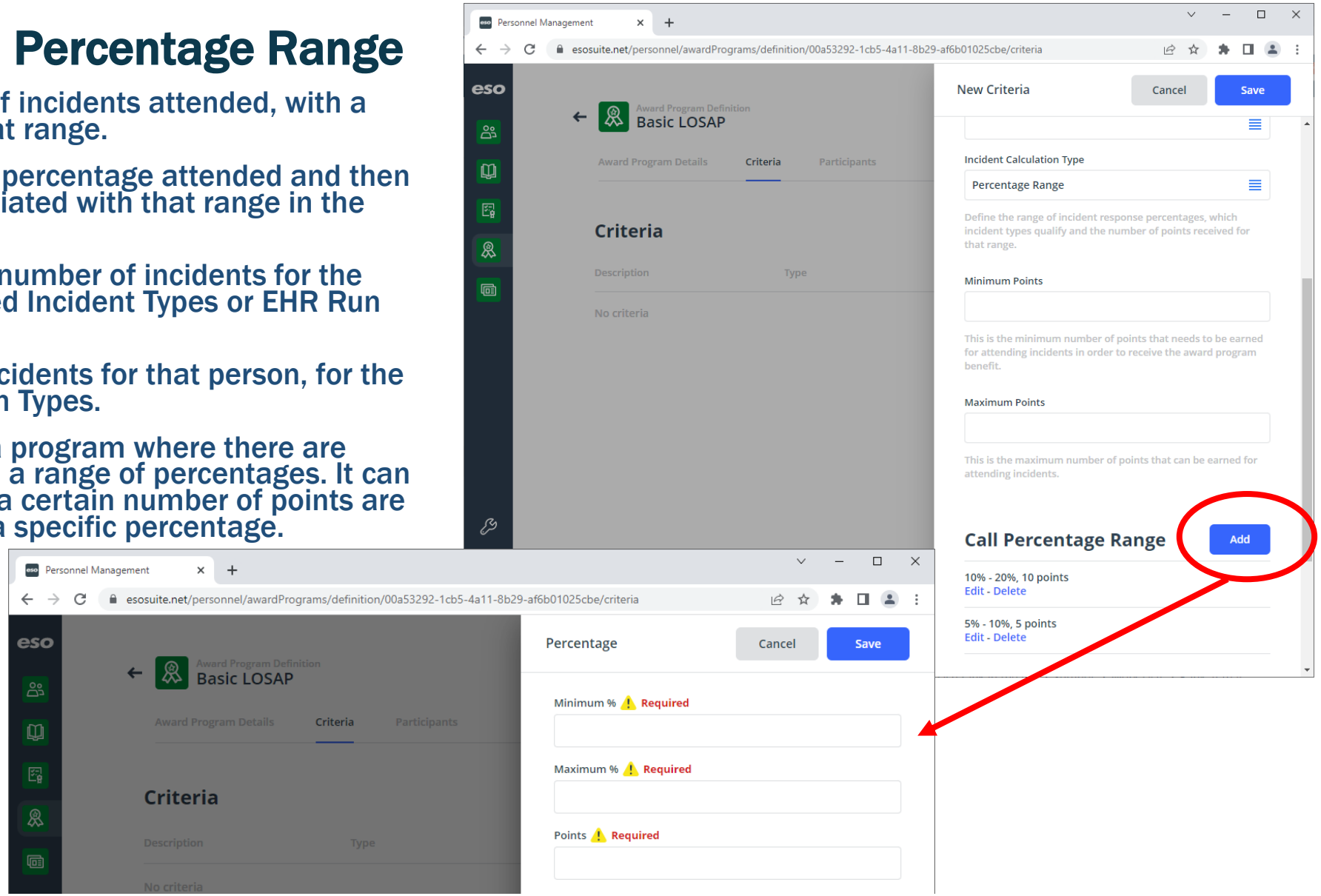
You can set up ranges of percent of incidents attended, with a number of points associated to that range.

The award program calculates the percentage attended and then counts the number of points associated with that range in the total for the award program.

The award program uses the total number of incidents for the denominator, based on the selected Incident Types or EHR Run Types.

The numerator is the number of incidents for that person, for the selected Incident Types or EHR Run Types.

You use this calculation to set up a program where there are different points assigned based on a range of percentages. It can also be used for a program where a certain number of points are assigned if the participant is over a specific percentage.



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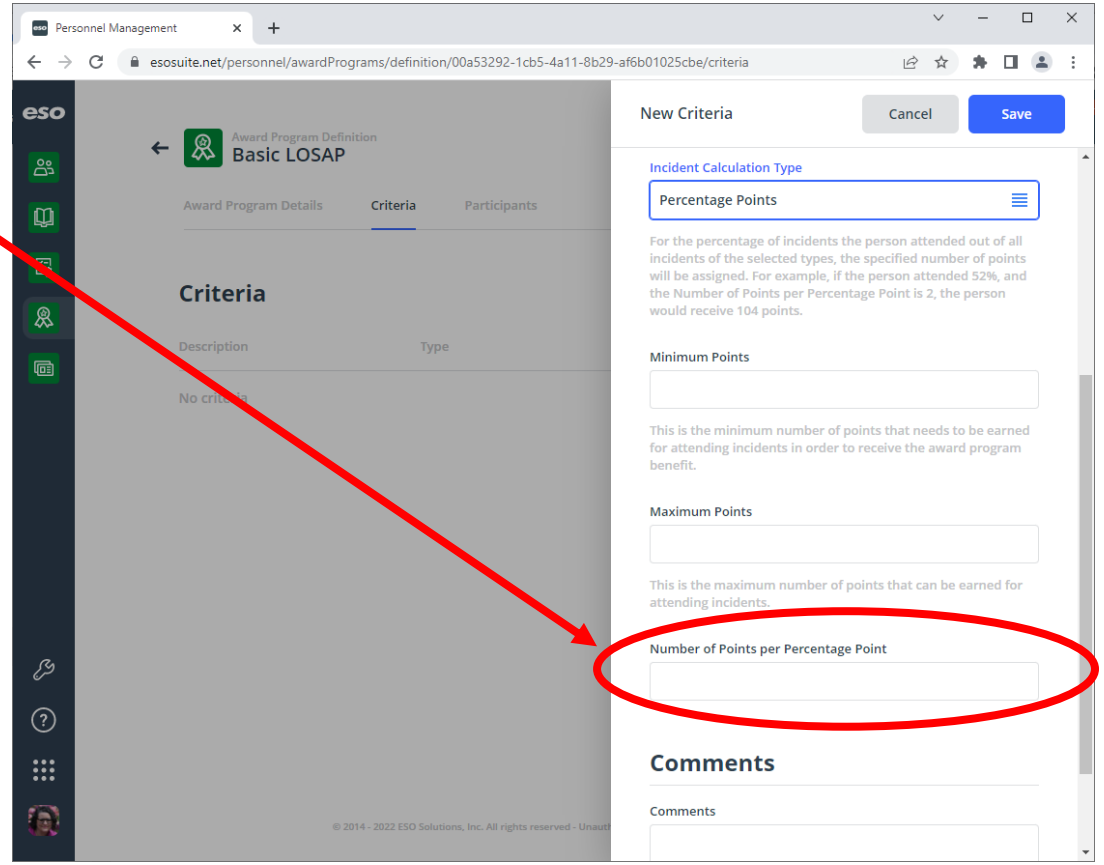
Incident Calculations – Percentage Points

You can set a specific number of points for a percentage.

You use this if the program requirement grants a certain number of points based on the percentage of incidents that the participant attended.

If you assign one point for a percentage, then this calculation can be used as a flat percentage calculation.



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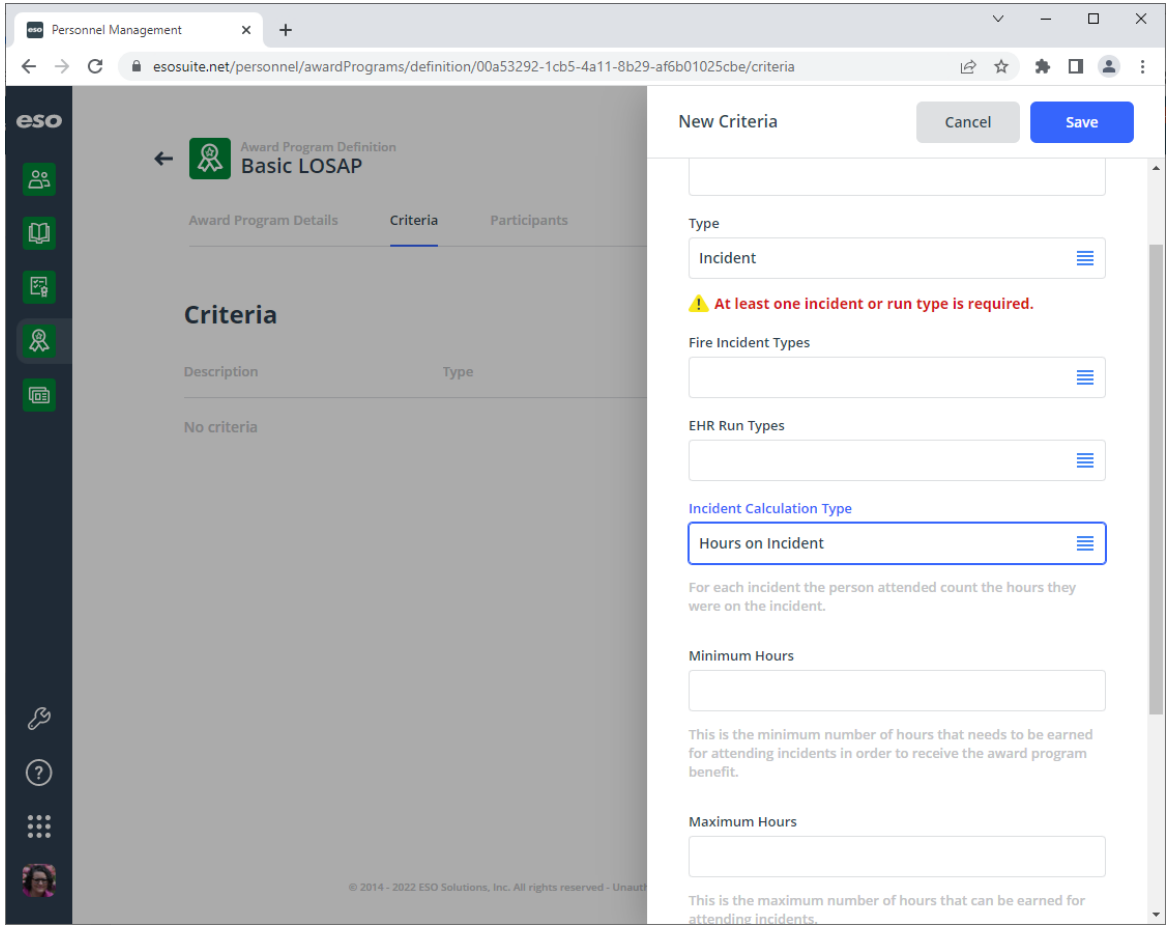
Incident Calculations – Hours on Incident

The number of hours, or fraction of an hour, that the person attends an incident is counted toward the total.

Use this for award programs where the calculations are all based on hours, not points.



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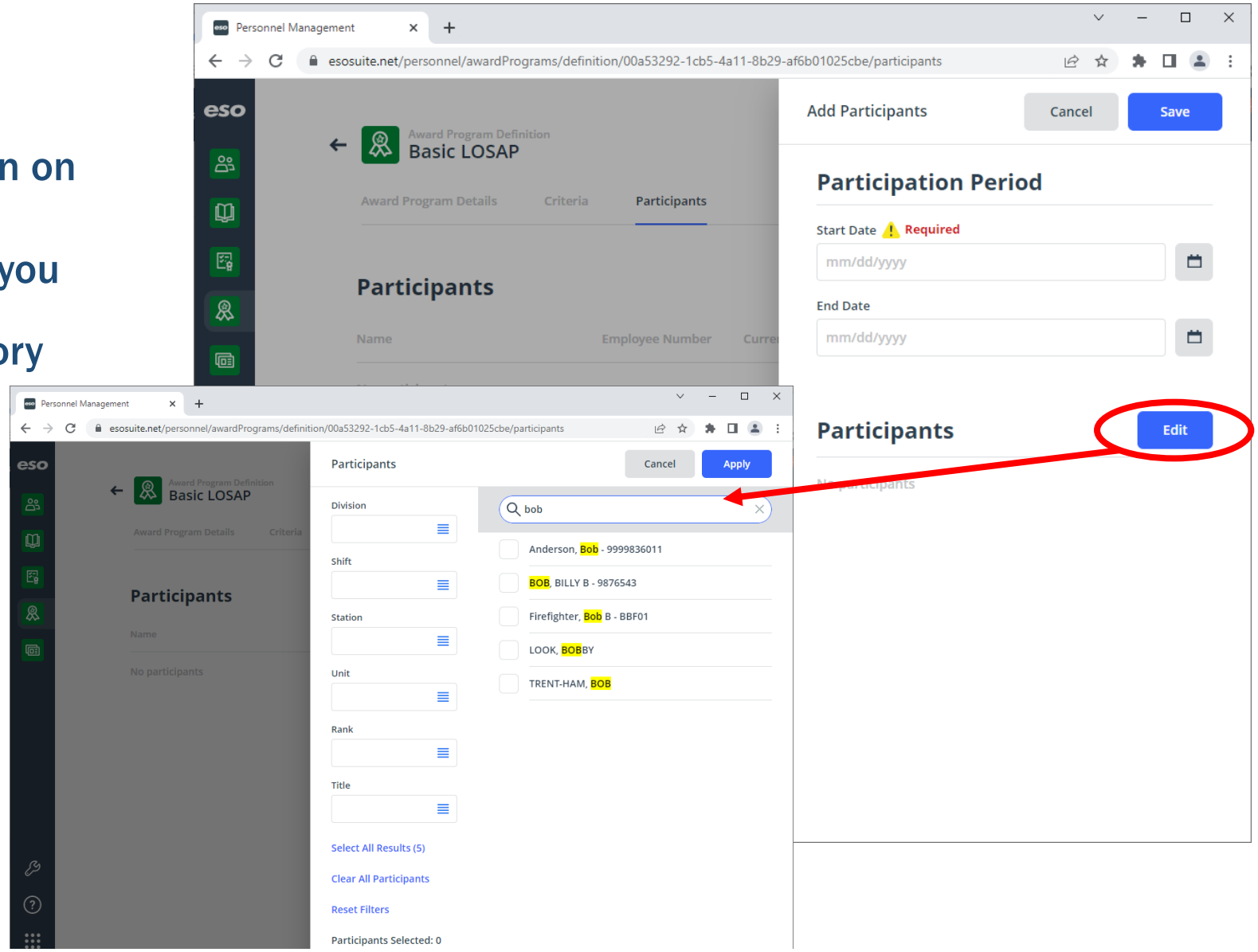
Adding Participants

You can add participants singly or in groups from the Add Participant button on the Participants tab.

You set the participation period when you add the person, but you can update it using the Edit functionality in the History window.



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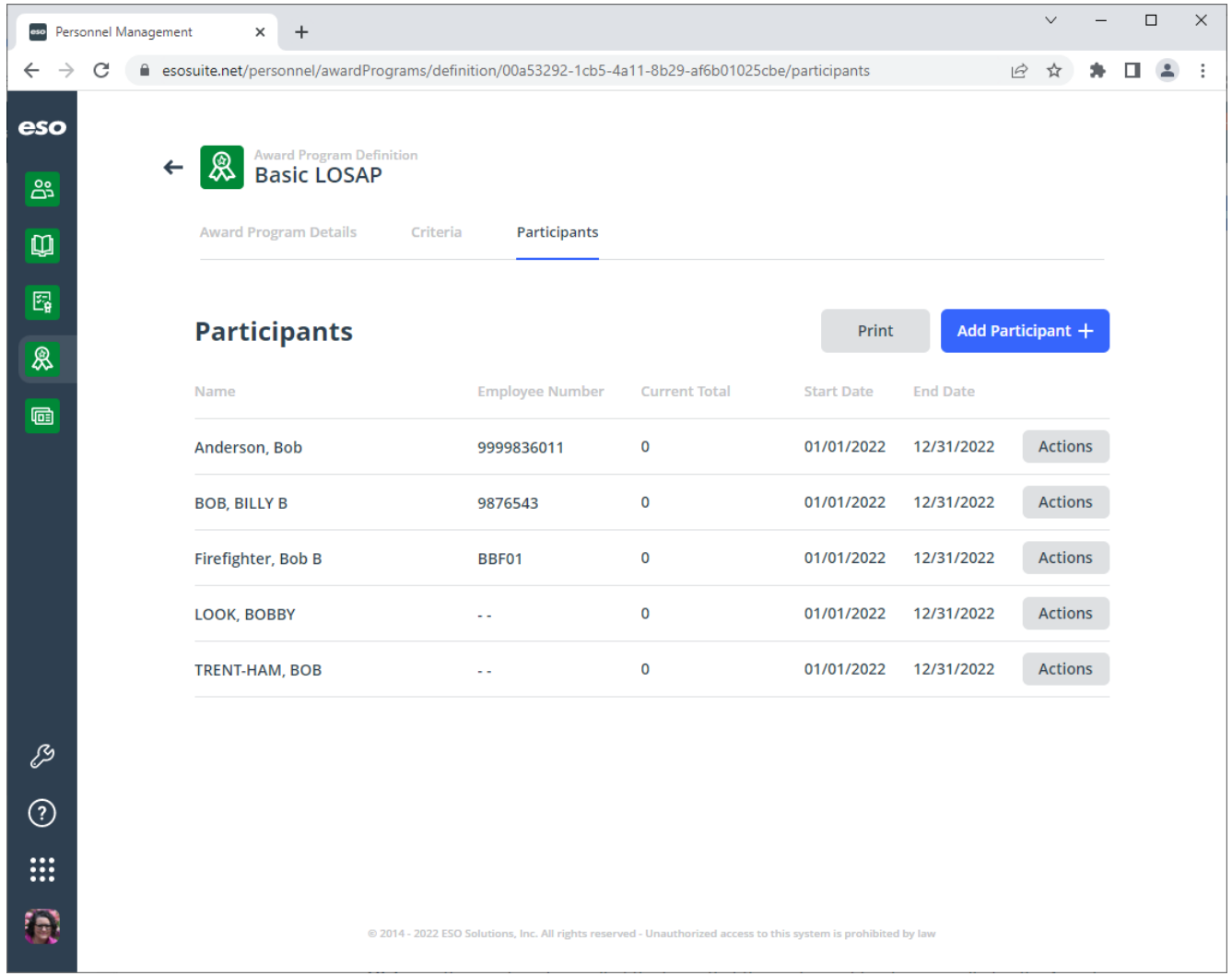
Participants List

This is an **unduplicated** list of every participant you have ever assigned to the award program.

The most recent award program information for that participant appears, including the current total for the criteria set.

The Print button lets you choose a time frame of participation periods and print the list of all personnel who are participants within that timeframe, with their award program level totals. (An option will be available in 2023 to also get the criteria totals for each person).

The Start Date and End Date define the participation period start and end dates.



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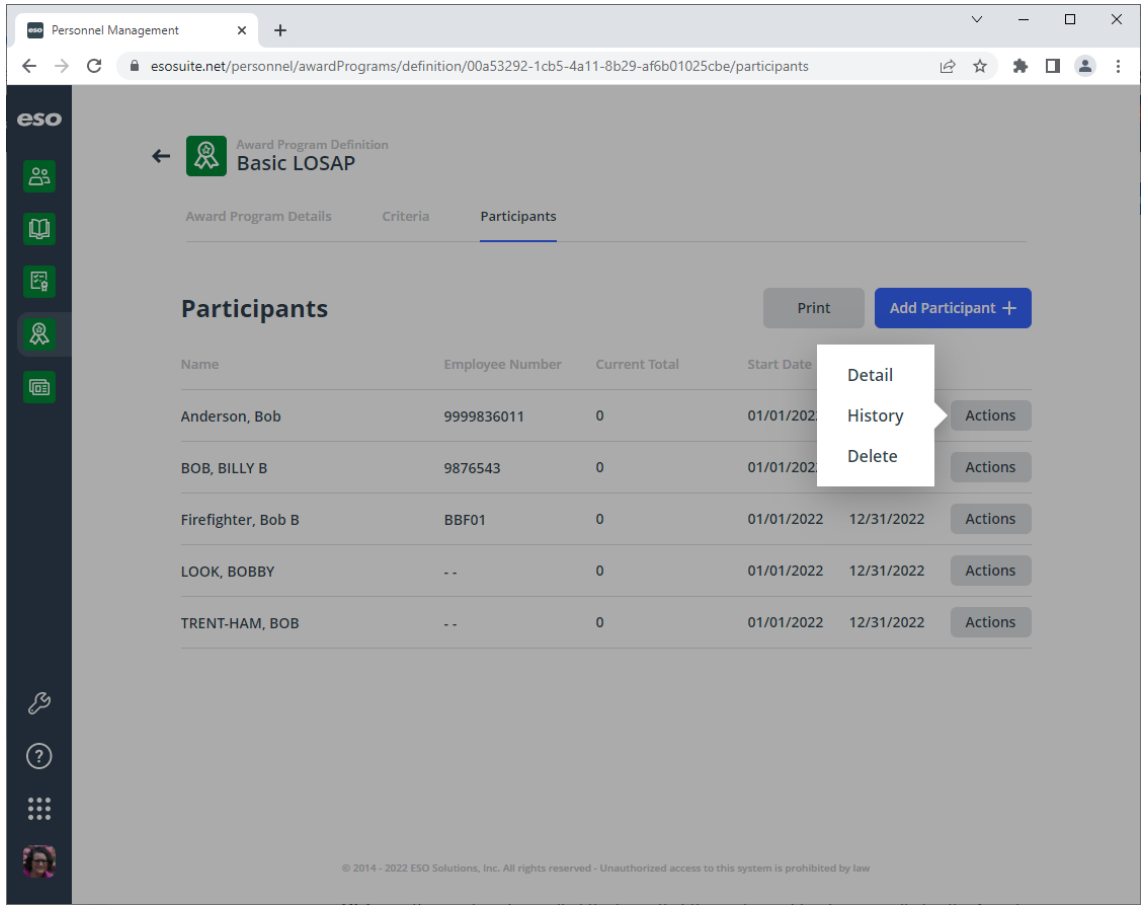
Participants List

The following three options appear in the Actions menu.

- Detail - This is the Calculation Detail which displays the running totals and all the substantiating data.
- History - This window displays all the times that this participant has been enrolled in the award program and lets you navigate to any of them. You can delete a specific participation period from this window.
- Delete - This removes the person from the award program entirely, for all participation periods.



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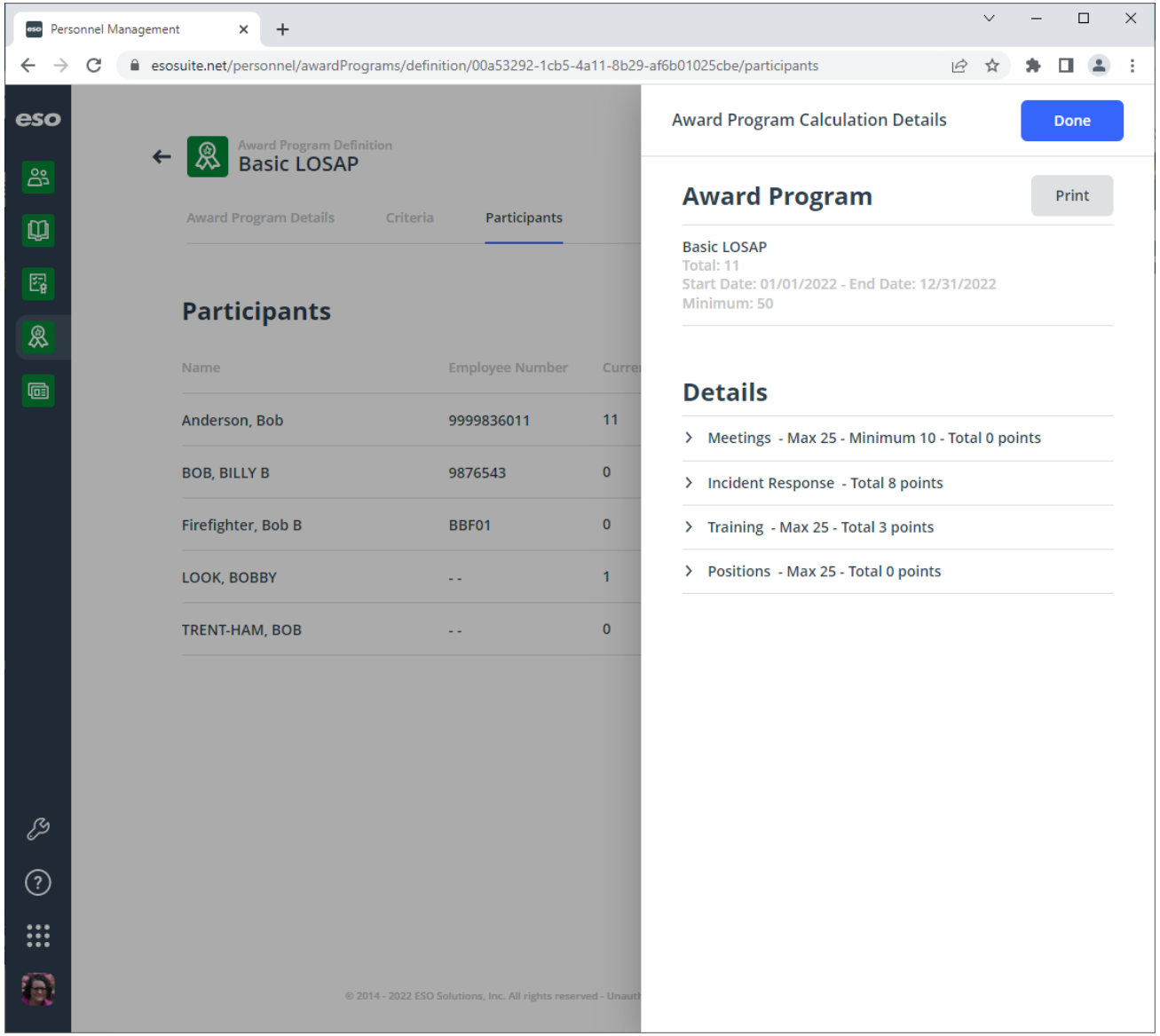
Calculation Detail

You can access this window from:

- The Award Program section > Participants list > Action menu > Details option.
- The Action menu > History option > Participants list > History window > Details option.
- The Person record > Award Programs list > clicking the row.



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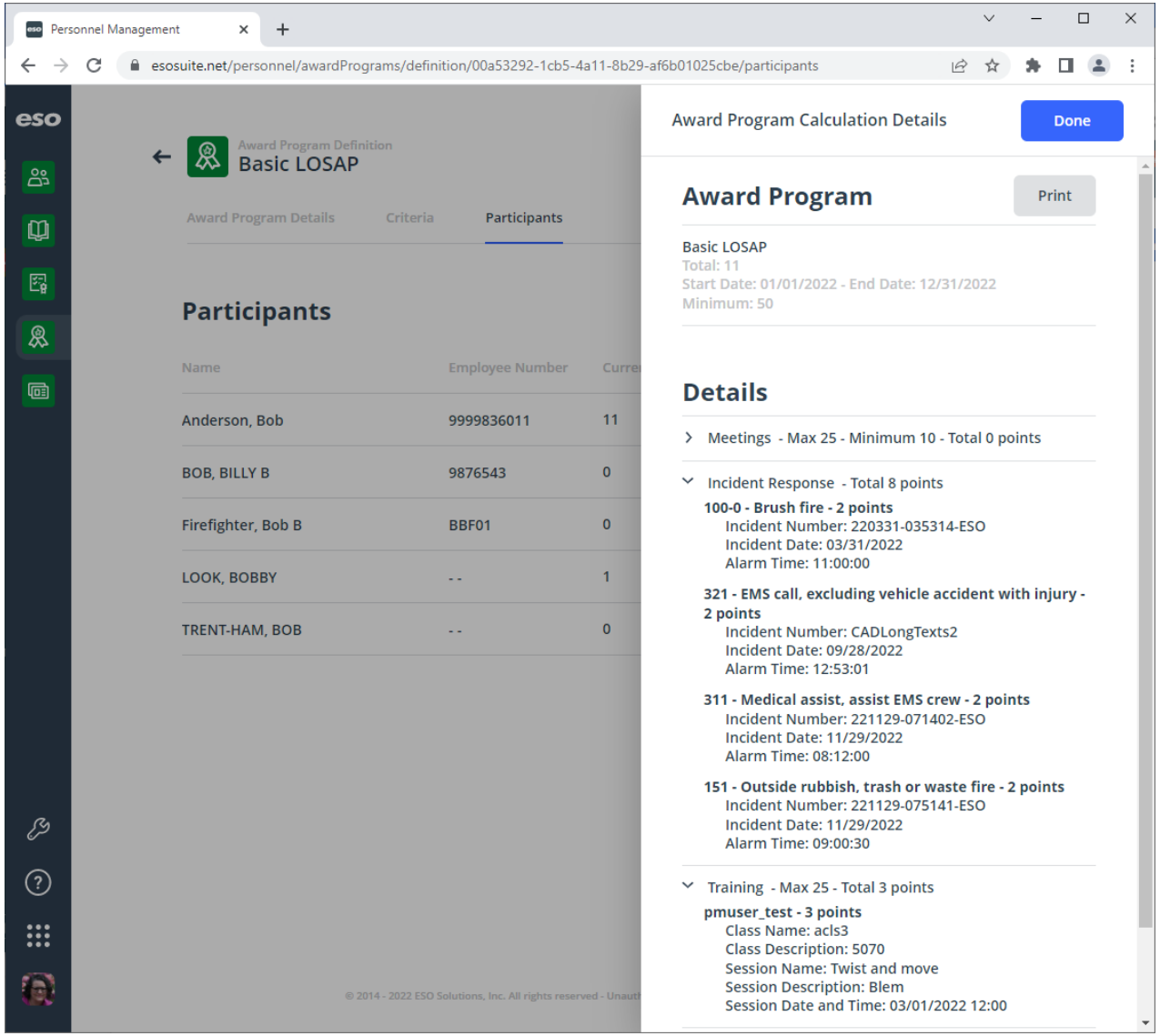
Calculation Detail

The Calculation Detail shows information about the award program at the top, then has a list of all of the criteria for the program. It includes the totals, as well as a minimum and/or maximum if they were entered, for each criteria.

You can expand each criteria to display all of the supporting information the award program uses for the calculation, so that the person can see exactly what is counted in the calculation.

The criteria is collapsed by default on entering the window, so that if there is a lot of data, all of the criteria are still available.



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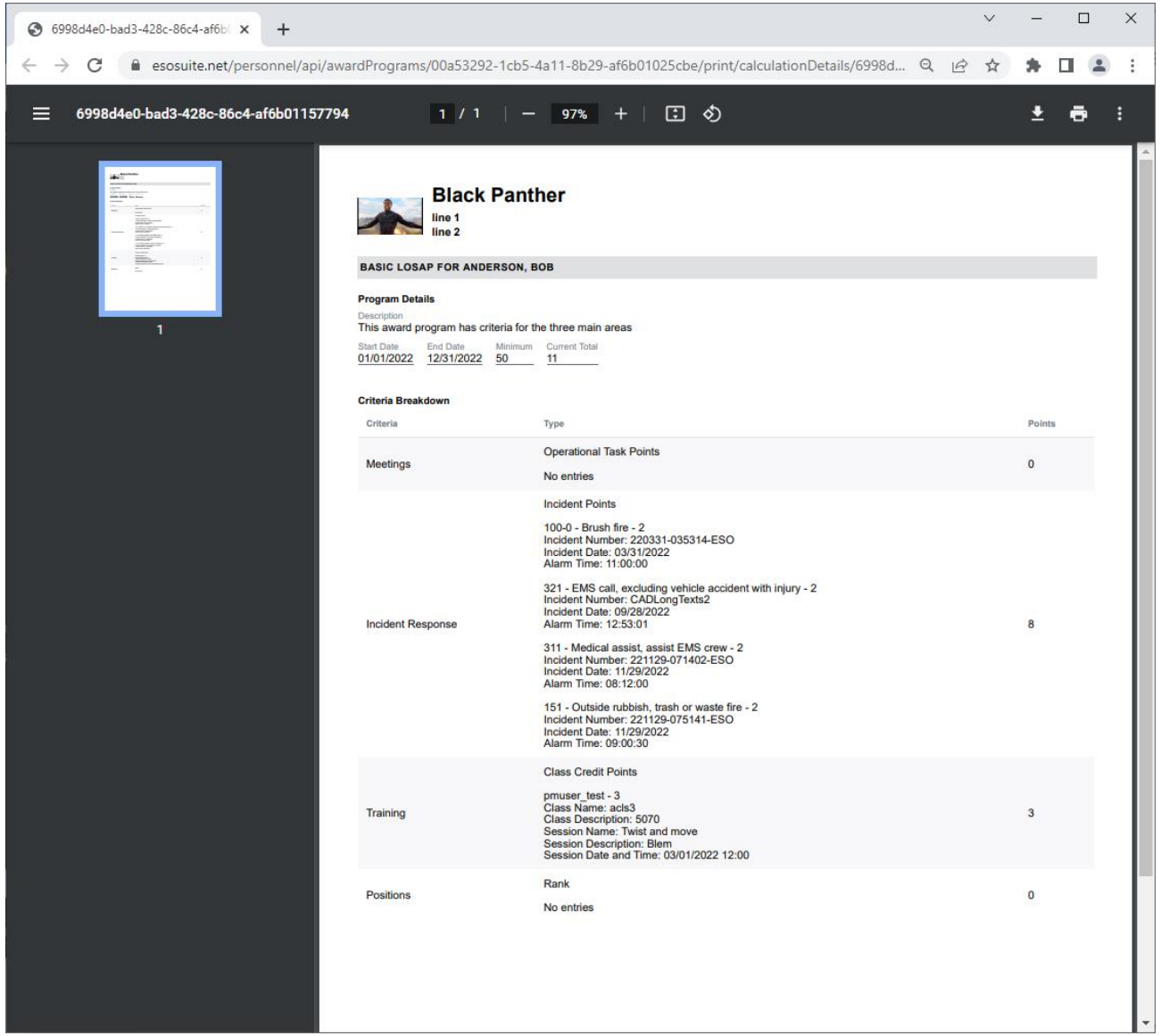
Calculation Detail Print

You can print or save this report from the Calculation Detail window.

It prints all of the same information available on the Calculation Detail window.

You can create and configure the header in the Print Setup section of PM > Settings.



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Agency Print

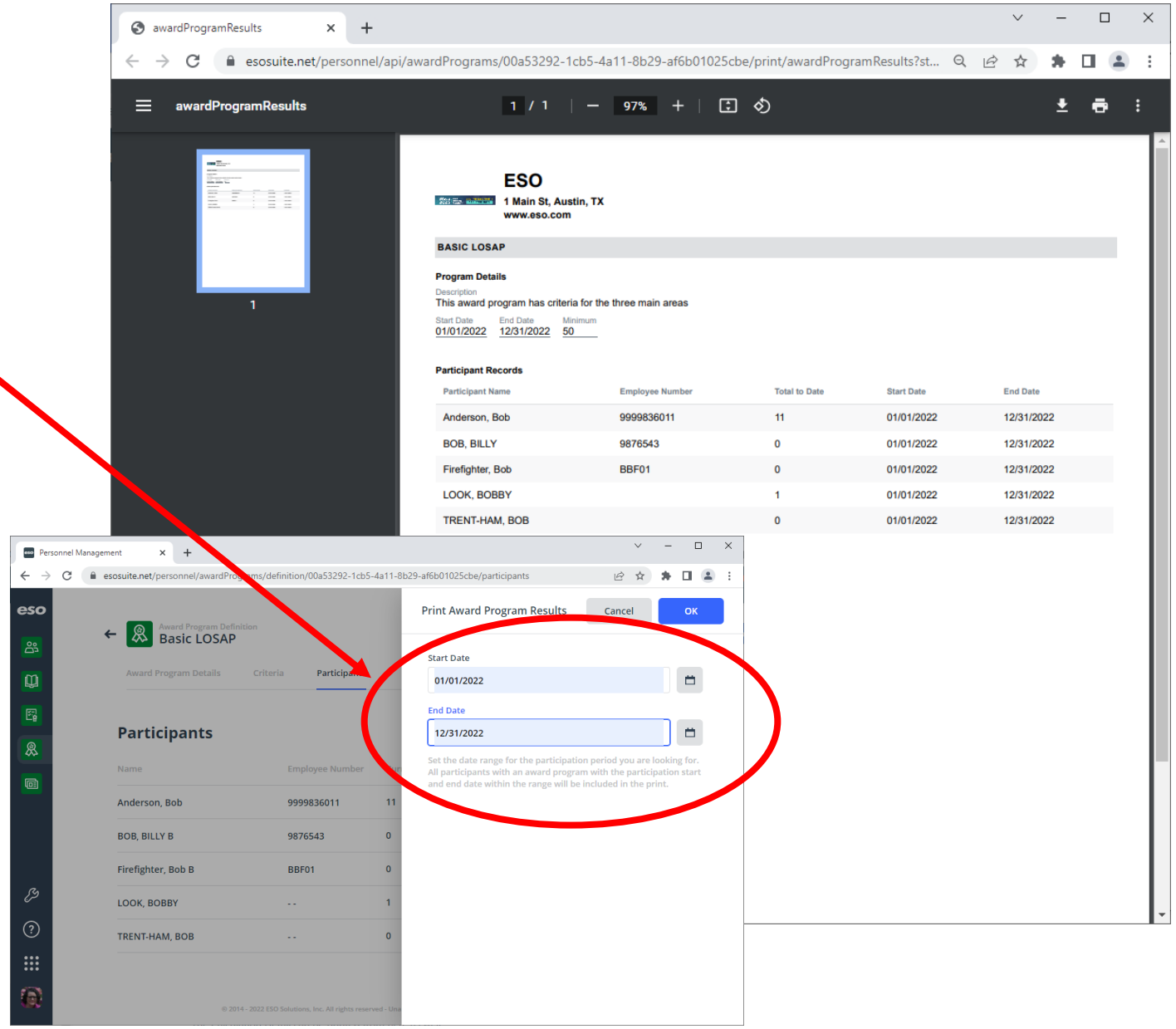
You can print or save this report from the Participant tab.

You must select the timeframe for the participation period.

It prints the list of all personnel who are participants within that timeframe, with their award program level totals.

An option will be available in 2023 to also display the criteria totals for each person.

You can create and configure the header in the Print Setup section of PM > Settings.



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Viewing Award Programs from within the Person record

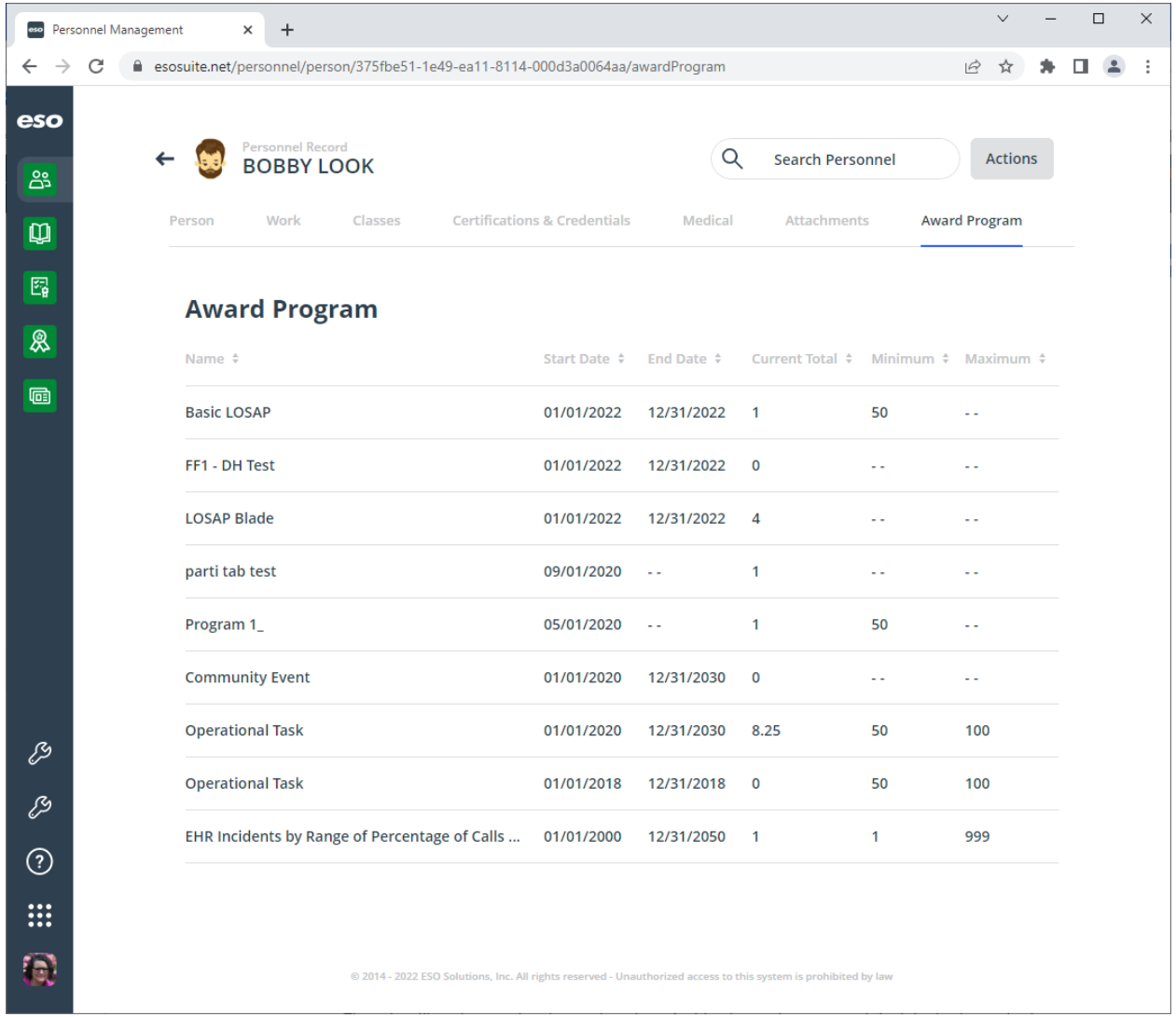
The person can see their own information for the award programs in which they have participated.

The Award Programs tab displays a list of all of the participation periods, for all award programs for that person, along with the current total and the program's minimum and maximum, if there is one.

Selecting the row opens the Calculation Detail.

This is currently available to all users of an agency that has purchased PM from the "View my Personnel Profile" link on the ESO Dashboard.

We will be adding a way for users in PM Basic agencies to access only their award program tab in 2023.



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FAQ

Q Do I have to have my Award Program set up on January 1 to get the calculations for the year? **A** No, as long as you have the underlying data captured in ESO, you can set up the calculations any time.

Q I had Fire Incident data imported from another system. Can I use that for calculations? **A** No, imported Fire Incident data is only imported into the ESO reporting systems. The calculations in Award Programs rely on data in the live ESO system.

Q I want to give one person extra credit toward the award program for something that they have done. How do I do that?

A Right now, you could add an Operational Task in Activities for that person, with the appropriate number of hours or points. In 2023, we will be adding an Awards and Recognition section in PM that will also allow you to add points or hours. It will be added as a criteria type.

Q How do I separate my fire incidents by station or unit? **A** In early 2023, we will add a selection by Unit that you can use instead of Fire Incident Types for Fire Incident calculations. Separate stations should have their own award program set up, so that you can select the appropriate units for that station. Once you set up one station, you can copy the award program and modify it for the other stations.

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