

# Evolution Advanced HR User Guide

**End User Version** 

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#### **Document Revision History**

Doc Version	Software Version	Date	Description
1.0	1.3	6/10/2016	Created this document as a subset of the Advanced HR User Guide – Service Bureau. This End User version contains end user information only, it does not contain the configuration and setup information found in the Service Bureau version of the guide.
1.1	1.3	7/6/2016	Added new chapter: Reports & new appendix list of standard reports. Added new chapter: Navigating Advanced HR. Other edits.
1.2	1.3 SP5	7/21/2016	Updated this guide with changes in the v1.3 SP5 release. Additional information added to the Employee Maintenance chapter. Added sections on Setting Up a Short Term Disability Plan and a Long Term Disability Plan to the Benefits chapter.
1.3	1.3 SP5	8/11/2016	Added new chapter: Requisitions & Applicant Tracking.
1.4	1.4	9/6/2016	Updated this guide with changes in the v1.4 release.

# **Advanced HR - Overview**

Evolution Advanced HR is a full-featured HCM solution that offers a unique combination of employee collaboration and traditional workforce management enabling managers and employees to access and update their information with ease. With integrated applicant tracking, onboarding, benefits administration and online enrollment, and training, Evolution Advanced HR combined with Evolution Payroll is your "one-stop shop" for all of your human capital management needs.

# Chapter 1: Navigating Advanced HR & the Home page

The Horizontal menu – located across the top left of most of the screens in Advanced HR – is the main method of navigating within the application. The Horizontal menu, displayed on the Home page, is shown below.

Advanced HR	Company :	BDazzled Design LtdBDazz1	Ŧ		Kathleen Shea Role : SuperAdministrator
					Sign Out
mployees Payroll Communi	cations Expenses Administration Reporting U	ilities Setup			
Home	K		-Type to Sear	ch-	Advanced Search My_Saved Searches
uick List					Image
ast Name	First Name	Position	Status		
T	T	T	T		
	Mark		Active		
arlow	Harriet		Active		
nlow	Jane		Active		
en	Lisa		Active		
nte	Barbara		Active		
<u>IX</u>	Ron		Active		
azer	JoAnne		Active		
orman	Renee		Active		
rd	Kristen		Active		
nagi	Yasir		Active		Edit Ima
C C 1 2 3 F F Page size	10 -			22 Items in 3 pages	Calendar
erts And Notifications					(4) 4 July 2016 → →→
Subject	Description	Received On	Status	Delete	S M T W T F S
T	T	ΞŢ	T		27 26 27 28 29 30 1 2 28 3 4 5 6 7 8 9
Task:Service Alert					29 10 11 12 13 14 15 16
<ul> <li>Event:Service Alert</li> </ul>					30 17 18 19 20 21 22 23
Jatin Mali	Employee has reached 30 days of Service	7/04/2016	1	×	31 24 25 26 27 28 29 30
Yasir Izanagi	Employee has reached 30 days of Service	6/25/2016	1	×	32 31 1 2 3 4 5 6
< < 1 ► H Page size: 20	•			2 items in 1 pages	·
					Company News
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and the second s	A second and a second s				A REAL PROPERTY AND A REAL

**Note:** The specific Horizontal menu items that display for each user will depend on your service bureau's unique implementation of the application (which modules have been purchased, etc.), the user's role, and the security permissions that have been set for the user by the System Administrator.

# Horizontal menu items

The following is a list of the Horizontal menu items that may display for a user:

Employees Payro	II Communications Expenses Administration Reporting Utilities Setup
Menu	Description
Employees	Manage all of your employee data in a single location. Access Employee's personal info, benefits, employment information, discipline, certifications and licenses, employee folder, etc. Manage your employee's assets.
Communications	Broadcast company announcements and send messages to employees. Create alerts to remind employees about everything from open enrollment to an expiring driver's license.
Expenses	Access the Employee Expenses module.

#### Evolution<sup>®</sup> Advanced HR

Menu	Description
Administration	Access job requisitions, add new hires, benefits, job profiles, position management, recruiting, onboarding profiles, training, etc. For administrators & super administrators roles. Automate your onboarding process. Send automated notices to new hires and have them complete all of their information including electronically signed consent, I-9, and W-4 forms.
Reporting	Extensive reporting features including custom reports, audit reports, standard reports, and benefits reports.
Utilities	Advanced HR has an import utility, export utility, import benefits, export benefits, and a mass change capability. For example, the import utility allows you to upload multiple Job Titles in bulk.
Setup	Set up company, manage roles for security, set up recruiting, manage the default table setup, compensation management, etc.
Payroll	Access Evolution Payroll in embedded mode within Advanced HR. Payroll processing, Payroll Reports, and additional Payroll functionality is accessed by clicking on the Payroll Menu in Advanced HR. Only users with the rights to access the Payroll Menu will be able to see this option in the Menu Bar.
Analytics	Access Evolution Analytics in embedded mode within Advanced HR. Depending on the service bueau and the user role; a user may not have access to the Analytics menu tab.

# Home Page sections

The Home page in Advanced HR contains various sections:

- Image
- Calendar
- Quick List
- Company News
- Company Documents
- Links
- Reports
- Charts
- Alerts and Notifications

Selected sections are described below. The Quick List is described in the Employee Maintenance chapter.

Home			Type to fe	annA-	Advanced Bearsh My Saved Bearshee
uick Lief					Image
ast Name	First Name	Job Title	Status		
T	T	(T)	T		
orayth	Megan Jaka	NA NA	Active		
ukž zatesa	Defay	NA Hotes	Attve		
ard .	Johnny	Assistant to the Assistant Manager	Active		
141	8:0	Recepton	Active		
2.811	Liss	Weiness Coach NA	Active		
01 201000	Angata Karan	NA	Active		
<u>n</u>	William	NA	Active		
oter	Hannah	NA	Active		
( ( ) 2 3 4 5 6 7 8 p p) Pagesize 30				75 items in 8 pages	
erts And Notifications					Calendar
Subject	Description	Received On	Status	Delete	++ + August 2016 + ++
T	T.		<b>T</b>		S M T W T F S
Task: SOI Approvis					22 21 1 2 3 4 5 6
<ul> <li>Event: EOL Approval Pending</li> </ul>					33 7 8 9 10 11 12 13 34 14 15 16 17 18 19 20
Jeff Lebowski		\$252016			35 21 22 23 24 25 25 27
Johnny Picant		6272016			36 28 29 30 31 1 2 3
Task: Life Status Change					37 4 5 6 7 8 9 10
Event: Ure Status Change     Mit Laboweil	Dental	5252016	Approved		
Johnny Picard	Vision	5272015	Approved		Company News
Task: Service Aven					New Company Announcement
<ul> <li>Event: Service Alert</li> </ul>					New Announcement
Angela Lansbury Stella Dunat	Employee has reached 5 months of Service Employee has reached 5 months of Dervice	7012016 7012015		×	Another Company Announcement
todd leavitt	Employee has reached 5 months of Service	7/19/2016		×	
A T F M Page size: 20 -				7 items in 1 pages	
rkflows					
rkflow Initiated By		Employee Name No Data Avalable		Initiated On	
4 1 F H Pagesite 10 +		NO DALE AVERADIO		0 items in 1 pages	Company Documents
A I F H Pagence 10 *				o iens in r pages	Employee Handbook
rts					Employee Review Criteria 2015 Holday, Schedule
					New Form
Employee Status		Role Summary			2016 Review Ortheria for Payroli
Active		Administrator			Another Document
Terminated		Enginyee			2016 Employee Handbook
					Non Disclosure
		Supervisor Trainer			2019 Holiday Schedule
					Handbook
23		7			Sexual Harasement Policy
					Links
					Human Capital Management
					Cigna Healthcare Provider Directory
Applicants Status		Denafit Summary			Reports

#### Image

Users can upload a photo or other image that they want to have displayed on the Home page in the **Image** section.

To upload an image:

1. Click on the **Edit Image** link in the **Image** section of the Home page.



2. Click the **Choose File** button and browse to the photo or other image that you want to load.

**Note:** You can upload a JPEG, PNG, GIF, or JPG file. The file size limit is 2 MB. The ideal photo size in pixels is 269 x 338. Be careful not to load an image with a large file size; doing so can significantly impact system performance.



# Calendar

The **Calendar** section contains a standard calendar for the benefit of the user.

44	•	A	ugus	t 201	6	•	**
	s	м	т	w	т	F	s
32	31	1	2	3	4	5	6
33	7	8	9	10	11	12	13
34	14	15	16	17	18	19	20
35	21	22	23	24	25	26	27
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10

## **Company News**

The **Company News** section on the Home page is a place for all users to refer to any applicable company announcements. These company news announcements do not appear in the Portal.

Company News		1
New Company Announcement	A	•
New Announcement		
Another Company Announcement		
Onsite Flu Shots schedule forJune		
		h
		•

The user clicks on the title of the announcement (a link) in the **Company News** section of the Home page and can view a popup display of the details of the announcement such as the following sample:

Company News	X
Flu Shots - November 15	Publish Start Date : 2/8/2016 Publish End Date : 3/1/2016
Get ready for Winter at the Company Flu Shot Clinic on November 15 in the company bre	ak room.

Users with the appropriate security can create company news announcements on the **Communications** – **Announcements** screen. The user can have the announcement display in the **Company News** section on the Home page during a specified date range (**Publish Start Date** and **Publish End Date**). Announcements can be edited and/or deleted by the user (with appropriate security).

## **Company Documents**

There are a number of different HR company document types that can be tracked and posted in the system for easy access for all employees or for selected employees. For example, documents such as company handbooks, policies and procedures, and sample forms can be displayed for employee review; employees can save or print the documents as needed.

Company Documents
Employee Handbook
Employee Review Criteria 2015
Holiday Schedule
New Form
2016 Review Criteria for Payroll
Another Document
2016 Employee Handbook
Non Disclosure
2016 Holiday Schedule
Handbook
Sexual Harassment Policy

Company documents display on the **Company Documents** section of the Home page; they also appear in the Company Documents section of the Employee Portal. Users with proper access (if applicable) can then click on the document link in the **Company Documents** section of the Home page to display the document.

The company documents are created on the **Communications – Documents** screen. Administrators control who has access to the document at the lower left of the screen. They can select the following options:

- All Employees select this option to have the document be available to all employees.
- Select Roles select this option to limit access to the document by security role, such as Employee, Administrator, Manager, or you can make the document Read Only.
- Advanced Criteria select this option to further restrict access to the document by items such as Company, Job Title, Employee Status, or Employment Type.

### Links

The Links section lets administrators place a clickable link on the HR Home (Main) page. Links are shortcuts for URLs – the global address of websites, documents, and other resources on the World Wide Web that would be handy for users; for example – to benefit carrier's websites.



The users click on the link to go to that website address (URL).

Users with the proper security can configure any number of links that will all appear on the Home page, in the Links section.

**Note:** Currently, there is a limit on the Create a New Link screen of the number of characters you can enter in the URL field. This field will be made longer at a later date. Until then, a suggested workaround is to use Google's URL Shortener tool to shorten a long URL in order to fit this field. Here is a link to the Google Shortener tool: https://goo.gl/



## Reports

The **Reports** section of the Home page provides links to the user of any reports that they have recently accessed.

Reports		
Employee Count		
Employee Roster		
Applicant Location Choices	Rep	
Active Employees		

Users can click on a report link here for a shortcut link to reports to which they frequently refer.

## Alerts and Notifications

The Alerts and Notifications section of the Home page presents any automatic alerts that have been set up for this user. Possible items that may appear here vary depending on the company and the user's role and include Self Hire employee approvals, New Applicant notifications, Service Alerts, etc.

Alerts And Notifications				
Subject	Description	Received On	Status	Delete
T	T		T	
<ul> <li>Task::Approval Pending Employ</li> </ul>	rees			
<ul> <li>Event::Self Hire Process</li> </ul>				
Ernie Fulton	ErnieF	5/26/2016		
<ul> <li>Task::Approve request to change</li> </ul>	e Employee Information			
<ul> <li>Event::Employee Approval</li> </ul>				
Austin Smith		5/04/2016		
<ul> <li>Task::EOI Approval</li> </ul>				
<ul> <li>Event::EOI Approval Pending</li> </ul>	g			
Abigail Brown		11/18/2015		
Anna James		12/10/2015		
Megan Forsyth		11/18/2015		
<ul> <li>Task::Jobs and Positions</li> </ul>				
<ul> <li>Event::NewApplicant</li> </ul>				
Lnm Fnm	Applied for Dairy Packaging Technician	11/18/2015		
Mays Mary	Applied for Dairy Packaging Technician	12/21/2015		
Meyers Seth	Applied for Assistant General Manager	12/21/2015		
Task::Service Alert				
<ul> <li>Event::Service Alert</li> </ul>				
Rudy Scriptnoli	Employee has reached 5 months of Service	5/20/2016	1	×
14 4 4 kl Bogo size:				O itomo in 4 noo

Users clicking on an alert/notification are taken to the corresponding screen, such as Employee Benefit Election approval shown below.

Benefit Elections report Manually run service Employee Benefit Elections (Right click	Update to Payroll Show Closed E column headers to add/remove fields)	ections				
Name	Plan Name	Plan Type	Enrollment Date	Enroliment Status	Coverage Level	Action
Abigail Brown	Cigna - High Deductible	Medical	05/02/2016	Completed	EE + Children	Select 💌
Abigail Brown	Cigna - Dental	Dental	05/02/2016	Closed	Family	Select ×
Abigail Brown	Cigna - Vision	Vision	05/02/2016	Closed	EE	Select ×
Abigail Brown	Voluntary Life	Voluntary Life	05/02/2016	Closed	Employee	Select =
Abigail Brown	401K	401k	05/02/2016	Completed	Single	Select 💌
Abigail Brown				Started		Select 💌



## Charts

The Charts section on the Home page is a graphical dashboard look at few key metrics such as:

- Employee Status number of Active and Terminated employees
- Role Summary number of employees, managers, administrators
- Applicant Status number of new hires in progress, registered
- Benefit Summary number of benefit elections started, completed, and closed

Charts	
Employee Status Active	Role Summary Administrator Administrator - St Employee - LM Manager
Applicants Status New Hire InProcess Registered	Benefit Summary Complete Open Waived

# Moving between Advanced HR and the Port

Users with the proper security can easily switch between Advanced HR and the Employee Portal (The Port) by clicking the icons on the upper right of the screen, as shown below.

# Navigating from Advanced HR to the Employee Portal

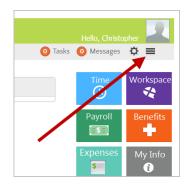
To move from Advanced HR to the Employee Portal, click on the multicolored icon at the upper right of the Advanced HR screen, as shown below.

Ch	nristoph	er Davies		
Rol	le :	Manager	•	<del>0</del> 0
	Sigi	<u>ı Out</u>		



# Navigating from the Employee Portal to Advanced HR

To move from the Employee Portal to Advanced HR, click on the so called "hamburger" icon at the upper right of the Employee Portal, as shown below.



# Save before navigating elsewhere

Make sure in your daily use of Advanced HR that if you add or edit any information on the screens, for example on any of the **Employment** tabs (Employment, Pay, Workers Comp. etc.) make sure that you click the **Save** button before navigating elsewhere in the system. If you add information on these screens and navigate away without saving, your changes will be lost. Some, but not all screens, are programmed to give you a warning that you have not yet saved.

# Logging out of Advanced HR

To log out of Advanced HR, click on the **Sign Out** link at the top right of the screen as shown below.



# Chapter 2: Employee Maintenance

RSONAL	EMPLOYMENT	TALENT MANAGEMENT	EMPLOYEE FOLDER	Recently Viewed Employees
nergency Contacts	Pay	Certifications & Licenses	EMPLOYEE SNAPSHOT	
pendents	Worker's Comp	Training Employee View	ASSETS	
Kes	Discipline			
ect Deposit	Points			
oto	FMLA/LEAVE			
tes	CUSTOM FORM			
NEFITS				

The Employee menu screens contain all employee data and information in Advanced HR. Screens are organized by category (the items in all caps and with the green font color, for example - PERSONAL), and can be accessed using the menu bar at the top of the Home screen (click the **Employees** menu item).

# Employee menu items

The table below briefly describes each of the sections of the Employee menu.

Menu	Description
Personal	The Personal menu contains personal information about each employee. This information includes Emergency Contact info, Dependents, Federal Tax data, Direct Deposit data, employee photos, and a place where notes about the employee can be entered.
Employment	The Employment menu contains information about the employees pay rates, workers comp cases, disciplinary information, points (if applicable), and information about FMLA and extended leave data.
Benefits	This menu contains information about the employee's current benefit elections as well as information on Open Enrollment, New Hire Enrollment, and Life Status Changes.
Employee Payroll	The Employee Payroll menu contains payroll-specific data. This includes State and Local Tax, Job Costing, Scheduled E/Ds, and multiple pay rates.
Custom Form	The Custom Form section allows the company to enter Custom Fields on the employee record to track any additional needed data.
Talent Management	The Talent Management section allows the company to track and manage employee certifications and licenses as well as show training classes and tracks that the employee is assigned.
Employee Folder	The Employee Folder allows the company and the employee to maintain documents and documentation on any number of needed items. Information contained here can be Consent Documents, Company Documents, Disciplinary Documents, etc.
Employee Snapshot	The Employee Snapshot is a screen that allows users to see employee information at a glance. This information includes data from the Personal and Employment menus such as the Employees name, address, and current job title as well as pay/salary information.
Assets	For companies tracking company assets, the Assets menu allows users to assign and track items such as laptops, key fobs, cars, or other assets belonging to the company.

# Finding employees

There are multiple ways to find and select an employee in Advanced HR:

- Employee List and the Quick List
- Global Search
- Advanced Search
- Next and Previous Employee
- Company Directory

# **Employee List**

Click on the **Employees** menu item to display the employee list. This will display the default Employee view. In the Advanced Search section you will learn how to change the default view. The system displays the employee's Username, SSN, Emp ID, Last Name, First Name, Job Title, and Status in column fields.

RobertAlsop     3       JessicaBlack     4       AnneBlake     3       Harriette Blaker     3       AbigailBrown     4	¥           30-55-3222           30-55-3214           43-27-6329           30-65-3223           30-65-3227	<b>T</b> 15 7 36 16 20	Allan Alsop Black	T Sophie Robert	N/A N/A	Active Active
RobertAlsop     3       JessicaBlack     4       AnneBlake     3       Harriette Blaker     3       AbigailBrown     4	30-55-3214 143-27-6329 130-55-3223 130-55-3227	7 36 16	Alsop Black	Robert		
JessicaBlack 4 AnneBlake 3 Harriette Blaker 3 AbigailBrown 4	43-27-6329 30-55-3223 30-55-3227	36 16	Black		N/A	Active
AnneBlake 3 Jarriette Blaker 3 AbigaliBrown 4	30-55-3223 30-55-3227	16				
AbigailBrown 4	30-55-3227			Jessica	N/A	Active
AbigailBrown 4		20	Blake	Anne	N/A	Active
		20	Blaker	Harriette	N/A	Active
athanBrown 3	43-27-6316	23	Brown	Abigail	N/A	Active
	30-55-3215	8	Brown	Nathan	N/A	Active
aithBuckland 4	43-27-6327	34	Buckland	Faith	N/A	Active
SueBuckland 4	43-27-6318	25	Buckland	Sue	N/A	Active
JnaCarr 4	43-27-6328	35	Carr	Una	N/A	Active
VilliamCarr 3	30-55-3220	13	Carr	William	N/A	Active
DianeChapman 4	43-27-6332	39	Chapman	Diane	N/A	Active
StephanieClark 4	43-27-6321	28	Clark	Stephanie	N/A	Active
LaurenClarkson 4	53-64-3579	47	Clarkson	Lauren	N/A	Active
PhilCornish 4	53-64-3577	45	Cornish	Phil	N/A	Active
ChristopherDavies 4	53-64-3575	43	Davies	Christopher	N/A	Active
BorisDver 3	30-55-3211	4	Dyer	Boris	N/A	Active
SebastianEdmunds 4	53-64-3576	44	Edmunds	Sebastian	N/A	Active
asonEllison 4	53-64-3591	59	Ellison	Jason	N/A	Active
leganForsyth 1	11-11-1111	1	Forsyth	Megan	N/A	Active

# **Employee Quick List**

When you access the **Home** Page, the Employee **Quick List** screen displays the employee's Last Name, First Name, Job Title, and Status in column fields. You can click on any column heading to sort the list by, for example – Last Name.

Quick List			
Last Name	First Name	Job Title	Status
T	T	T	T
Forsyth	Megan	N/A	Active
Welch	Jake	N/A	Active
Hostess	Betsy	Hostess	Active
Picard	Johnny	Assistant to the Assistant Manager	Active
Jones	Bob	Reception	Active
Cozart	Lisa	Wellness Coach	Active
Quinn	Angela	N/A	Active
Thomson	Karen	N/A	Active
Carr	William	N/A	Active
Hunter	Hannah	N/A	Active
I< < 1 2 3 4 5 6 7 8 ▶	▶ Page size: 10 ▼		75 items in 8 pages

# On the Quick List, you can use the filters above the employee Last Name, First

Advanced HR User Guide - End User

Name, Job Title, and Status to filter results and create a Quick List. Available options are "Contains", "Does Not Contain", "Starts With", "Ends With", "Equal To", "Not Equal To".

For example, in order to compile a list of employees whose name has the letters "co" in it, use the filter shown at right:

And the system then changes the Quick List screen to show any matches with what you entered in the filter (for example, 'co'):

Quick List			
Last Name	First Name	Job Title	Status
co	T	T	T
Cozart	Lisa	Wellness Coach	Active
Scott	Victor	N/A	Active
Cornish	Phil	N/A	Active
Cooper	Bradley	Computer Systems Analyst	Active
H			4 items in 1 pages

#### Sorting

The Employee list can also be sorted by any of the columns on the screen. To sort the list, click on a column heading, for example – the Last Name. This will re-order the list, either ascending or descending, based on the selected column. Number columns will be put into numerical order. Alphabetic columns will be put into Alphabetical order.

Employee List						
Username	SSN	Emp ID	Last Name	First Name	Job Title	Status
T	T	T	T	T	T	T
SophieAllan15146	330-55-3222	15	Allan	Sophie	Dairy Plant Manager	Active
allenA	549-66-4534	64	Allen	Andrew	CEO	Active
reports	330-55-3214	7	Alsop	Robert	N/A	Active
JessicaBlack36146	443-27-6329	36	Black	Jessica	Trainer First Class	Active
AnneBlake16146	330-55-3223	16	Blake	Anne	Reception	Active
harriette	330-55-3227	20	Blaker	Harriette	Training Manager	Active
abrown22	123-45-6666	23	Brown	Abigail	Trainer	Active

# **Global Search**

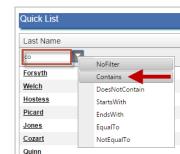
The Global Search box in the Navigation bar located below the Advanced HR Horizontal Menu tabs allows you to find employees, dependents, and/or emergency contacts that meet search criteria.

Evolution® Advanced HR	Company : UAT Testing Company-UAT	×	Sebastian Edmunds Role : Administrator 🔹 😚
Employees   Payroll   Communications   Expenses   Administration   Reporting	Utilities Setup		
👶 Home		-Type to Search-	Advanced Search My Saved Searches

Type to Search-

You can use this search to enter a portion of any name (last name or first name), and the results will produce any name matching the search. For example, you can start typing an employee's first name (Mi) and the system displays any matches (for example, Linda Mills, Michael Oster).

9/7/2016





<u>Home</u> > Employees > Employ	vyee List			$\rightarrow$	Mills,Linda-Last Name:Mills × • Mills,Linda-Last Name:Mills
Employee List					Oster,Michael- First Name:Michael
Username	SSN	Emp ID	Last Name	First Name	Titems 1-2 out of 2 Position
T	T	T	T	T	<b>T</b>
Mark4	354-78-5456	33385	В	Mark	r
hcarlow@evolutionpayroll.com	546-21-3879	8	Carlow	Harriet	r

## Advanced Search & My Saved Searches

You can utilize the Advanced Search and My Saved Searches feature to create and save specific searches.

-Type to Search-	•	Advanced Search	My Saved Searches

#### **Advanced Search**

The **Advanced Search** option in the navigation bar allows users to search for more detailed information based on a value and filtering by specific field information. Searches that are done often can be saved so that the filter information does not need to be entered in multiple times. Searches can also be assigned to show as the **Default View** for the user so that the default Employee list displays the employee list from that specific search information.

Advanced Search		
Search Name : * Dependent Names	Description : *	This search is used to find specific dependents by name
Filter Results By Field :* Dependent Last Name	Operator :*	Equal To Value :*
Search Result From Personal Emergency Contacts Dependents Talent Management Certifications Employee List Notes Attachments	Search	Save Cancel

To perform an Advanced Search:

- 1. Click on the Advanced Search link (for example, on the Employee List).
- 2. Enter a name for this search in the **Search Name** field (required field).
- 3. Add **Description** (required field) to label your search.



4. Select Filter Results By Field from the dropdown menu (required).

The following fields are available to filter results:

- Attachment Name
- Certification Issue Date
- Certification Type
- Dependent First Name
- Dependent Last name
- Emergency Contact Name
- Employee Department
- Employee Last Name

- Employee Location
- Employee Number
- Employee Job Title
- Last Paid Date
- Notes Name
- SSN
- Termination Date
- Type
- 5. Select **Operator** from the dropdown menu (required).
  - The following Operators are available:
    - Equal To
    - Not Equal to
    - Begins With

- Ends With
- Contains
- Does Not Contain

6. Type in the Value (required).

Search Result From will select the category automatically based on your Filter Results By Field criteria.

7. Click on **Search**.

Advance	Search				
Search Na	me:* Active Employees	Descri	ption : * List of Active I	Employees	
Filter Resu	Its By Field :* Employment Status	▼ Operat	tor :* Equal To	▼ Value	:* Active
Search F	Result From Personal Dependents Certifications Notes	Emergency Contacts Talent Management Employee List Attachments	earch Save Car	icel	Default View
Emplo	Job Title	Employee Number Location	n Employment Status	Username	
Select	Assistant to the Assistant Manager	92	Active	toddles78@comcast	
Select	Restaurant Manager	31	Active	AdamR	
Select	HR Assistant	94	Active	MeganMC	
Select	N/A	60	Active	LiamMackenzie60146	
Select	N/A	53	Active	GabrielleNewman53146	
Select	N/A	22	Active	AdrianMackay22146	
Select	N/A	13	Active	WilliamCarr13146	
Select	N/A	32	Active	GavinMcLean32146	

You can also click on Save to save the search and select it later in My Saved Searches.

#### **My Saved Searches**

The **My Saved Searches** link in the navigation bar allows users to use any advanced searches they have previously defined and saved. Click on the **My Saved Searches** link and the system displays any advanced searches you defined previously.

	nced HR		Advanced H	IR User Guide –	End User
-Type t	o Search-	•	Advanced Search	Ny Saved Sear	<u>ches</u>
My Saved Sea	rches				
🖨 Add	Collete				
	Name	Description	Record Filter	Record Type	Default View
<u>View</u>	SSN partial search	SSN partial search	SSN(Does Not Contain)443	Personal	False
<u>View</u>	First Name	first name of dependants	Dependent First Name(Begins With)D	Dependents	False
<u>View</u>	Current Employees	Current Active Employees	Employment Status(Equal To)Active	Employee List	False
View	Active Employees	This search is used to find only active employees	Employment Status(Equal To)Active	Employee List	True

#### Displaying a list of active employees only

To display a list of only my active employees on the Employee List:

1. Click on the Advanced Search link on the top right of the Home page. Result: The system displays the Advanced Search box.

Advanced Search	
Search Name : *	Description : *
Filter Results By Field :*Select	Operator :* Value :*
Search Result From Personal Emergency Contacts Dependents Talent Management Certifications Employee List Notes Attachments	Default View

- 2. Define a Default Employee View that will configure the view to list active employees only:
  - o Enter a name for the search in the Search Name field, for example: Default Employee View
  - Enter a **Description** of the view, for example: Default Employee View Active
  - o Filter Results by Field set to Employment Status
  - Set the **Operator field** to **Equal To**
  - Enter a Value of Active. Note: This is case sensitive: enter "Active".
  - Set the Search Result From to Employee List
  - Select the **Default View** check box option
- 3. Click Save.

Users can view inactive employees by defining a different Advanced Search, saving it with a different name and then using it by clicking the **My Saved Searches** text link at the top right of the Home page.

-Type to Search-	•	Advanced Search	My Saved Searches	
------------------	---	-----------------	-------------------	--

## Next and Previous Employee and the Employee dropdown

Once you are in an employee record, you can use the **Previous Employee** and **Next Employee** links to navigate backward and forward through the employee list. This is helpful when making updates to multiple employees.

C Home > Employees > Personal			-Type to Search-	•	<u>Advan</u>
Previous Employee 35 - Carr, Una	Employee: 36 - Black, Jessica 🔻 🅢	Show Concealed: Uiew All		Next Employee 37 -	Scott, Victor

Employees are also accessible via the **Employee** drop-down menu. You can start to enter an employee's first or last name or their employee number to be taken to that employee quickly.

Previous Employee 6 - Gorman, Renee D	Employee:	ja	•	0
Personal Info Emergency Contacts Dependents Taxes Concealed:	Direct Dep	1 - <b>Ja</b> nson, Jennifer L 4 - Carlow, <b>Ja</b> ne 33376 - Mali, <b>Ja</b> tin	tes	
Personal				Contact

#### Setting an Employee to not display on the list

You can set an employee to **Concealed** so that they will not display in the employee list. You could use this feature to hide inactive employees or other employees the user does not want to see in their lists.

Previous Employee 55 - Simpson, Anthony	Employee: 56 - Rampling, Audrey	0	Show Concealed:	View All
Personal Info Emergency Contacts Dependents Taxes	Direct Deposit Photo Notes			
Concealed: 🖉				
Personal		Co	ontact Information	
Common Name		Per	rsonal Email : * notindi	cated@unknown.com
Salutation :		Hon	me Phone : (802)	566-8537 Unlisted :
First Name :* Audrey		Cell	Il Phone : ()	<u>.                                    </u>
Middle Name :			Ilular Service	-
Last Name :* Rampling			IN/A	

If you set an employee to Concealed but want to have them display on the list, click on the **Show Concealed** option at the top of the screen.

		Previous Employee 55 - Simpson, Anthony	Employee:	56 - Rampling, Audrey	~	Ð	Show Concealed: 🗹	View All
--	--	---	-----------	-----------------------	---	---	-------------------	----------



# Company Directory & Organization Chart

If enabled for their role, a user can display a Company Directory from their Home page. To display the Company Directory:

1. On the Home page – if enabled for a user's role – a **Company Directory** link displays at the upper right of the screen, near the **Sign Out** link/button.

Christo	pher Davies
Role :	Employee 🔻
<u>a</u>	ompany Directory   Org Chart   Sign Out

2. The user clicks on the **Company Directory** link.

Result: The system displays the Company Directory screen listing all employees including: Last Name, First Name, Job Title, Work Phone and Work Email. This option is available for both Non-Position Enabled companies and Position Enabled companies.

Last Name	First Name	Job Title	Work Phone	Work Email	
Blaker	Harriette	Farm Hand	(802)555-5572	notindicated@unknown.com	
Allan	Sophie	N/A	(802)555-5567	notindicated@unknown.com	
Alsop	Robert	N/A	(802)555-5559	notindicated@unknown.com	
Black	Jessica	N/A	(802)566-8537	notindicated@unknown.com	
Blake	Anne	N/A	(802)555-5568	notindicated@unknown.com	
Brown	Abigail	Farm Hand	(802)566-8524	tleavitt@evolutionhcm.com	
Brown	Nathan	N/A	(802)555-5560	notindicated@unknown.com	
Buckland	Faith	N/A	(802)566-8535	notindicated@unknown.com	
Buckland	Sue	N/A	(802)566-8526	notindicated@unknown.com	
Carr	Una	N/A	(802)566-8536	notindicated@unknown.com	
Carr	William	N/A	(802)555-5565	notindicated@unknown.com	
Chapman	Diane	N/A	(802)566-8540	notindicated@unknown.com	
Clark	Stephanie	N/A	(802)566-8529	notindicated@unknown.com	
Clarkson	Lauren	N/A	(802)566-8528	notindicated@unknown.com	
Cornish	Phil	N/A	(802)566-8526	notindicated@unknown.com	

Administrators can enable a role to be able to display the Company Directory on the **Setup – Security – Manage Roles** screen (by clicking the **Show Company Directory** option).

#### **Organization Chart**

Note that for Position Enabled companies, users can also click on the **Org Chart** link on the Home page (if it has been enabled for the user's role) to display a graphical organization chart for the company.

Home > Organization Chart			Type to Search-	Advance	ad Search My Saved Searches
Charles Hill Megan Forsyth Abigail Brown Austin Smith Hannah Gibson	Megan Forsyth HR Administrator		R		
Janice White     Anne Blake     Nathan Brown     Nathan Brown     Anthony Simpson     Doug Underhill     Angela Quinn     Edward Martin     Boris Dyer	State: Location: Department: Work Phone: Cell Phone: Gender: Division:	Vermont 8024947444 6154787449 Female			
Sebastian Edmunds Luke Jackson Rudy Scriptnoli Una Paige Sue Buckland Harry Taylor Stephanie Clark Harry Randall Christonher Davies					

# Editing Employee information

Once an employee record is opened, you can use the **Employees** menu at the top of the screen to navigate to any employee screen. Employee screens are arranged by category, highlighted in green text.

Employees Payroll	Communications	Administration Re	porting Utilities Set	tup
PERSONAL Emergency Contacts Dependents Taxes Direct Deposit	EMPLOYMENT Pay Worker's Comp Discipline Points	TALENT MANAGEMENT Certifications & Licenses Training Employee View	EMPLOYEE FOLDER EMPLOYEE SNAPSHOT ASSETS	Recently Viewed Employees Brown, Abigail
Photo	FMLA/LEAVE			
Notes BENEFITS	CUSTOM FORM			
EMPLOYEE PAYROLL				

Once you navigate to an employee screen, other screens in that category will be arranged as tabs for the employee record.

<u>Home</u> > Employees > Employment	
Previous Employee 55 - Simpson, Anthony	Employee: 56 - Rampling, Audrey
Employment Pay Worker's Comp Discipline Points	FMLA/LEAVE

To edit an employee screen:

- 1. Click on a field on the screen you want to edit.
- 2. Type the new value into the field.
- 3. Click **Save** at the bottom of the screen.

**Important:** If you add or edit any information on any of the Employment screen tabs (**Employment**, **Pay**, **Workers Comp**. etc.) make sure that you click the **Save** button before navigating elsewhere in the system. If you add information on these screens and navigate away without saving, your changes will be lost.

Address Line 1 :	88 Chapel Street		
Address Line 2 :			
City :	Shelburne		
Country :*	USA	•	
State :*	Vermont	•	
Zip :*	05401		

**Note:** The system will automatically retain an audit trail of the date and time of the change, as well as the user that recorded the change.

For multi-record or list screens, such as Emergency Contacts or Dependents:

- 1. Click **Add** to create a new entry.
- 2. Create the new entry.
- 3. Click **Save** to save the record and return to the list.

Personal Info Emergency Contacts	Dependents Taxes Direct Deposit Photo Notes	
🕂 Add 😫 Delete		
Contact	Relation	Home Phone
T	T	T

To edit an existing data record:

- 1. Click on the link of the list item you want to edit.
- 2. Update the information.
- 3. Click Save.

Previous Emplo	ovee Anthony Simpson 55	Employee : Audrey Rampling-56	▼ 🕢	Show Concealed: 🔲 🛛 💆
Personal Info	Emergency Contacts	Dependents Taxes Direct Deposit Photo Notes		
🖨 Add	😂 Delete			
	Contact	Relation	Home Phone	
	<b>T</b>	T	T	
	Bob Rampling	Spouse	(802)887-8876	
K ( 1	▶ ▶ Page size: 5 ▼	]		1 items in 1 pages
				÷

To delete records on a list screen:

- 1. Click the box beside the list item to be deleted.
- 2. Click **Delete**.

Previous E	mployee Anthony Simpson 55		Employee : Audrey Rampling56	T Show C	oncealed: 🔲 🛛 🛛
Personal	Info Emergency Contacts	Dependents Taxes	Direct Deposit Photo Notes		
🛟 Add	😂 Delete				
	First Name	Relation	Gender	Age	
	T	T	T	T	
	<u>Kenny</u>	Child	Male	5 Year 1 months 24 days	
	Kelly	Child	Female	21 Year 8 months 21 days	
	1 ► ► Page size: 5 ▼			2	items in 1 pages
					Þ

Note: You may select multiple items for deletion.



## Viewing Change History of the Employee screens

The **View Change History** link on the upper right of the Employee screens lets you view an audit history of all changes made to the fields on the Employee screens for this specific employee.

-Type to Search-	•	Advar
	Next Employee	7 - Alsop, Robert
1	View Change History	1

The **View Change History** link displays on each of the tabs of the Employee screen (Personal Info, Emergency Contacts, Dependents, etc.).

Click on the **View Change History** link to display the Audit Change screen. Note that the Audit Change screen has tabs corresponding to each of the Employee screen tabs as the following partial screenshot shows.

Audit Change			
Personal Info Emergency C	ontacts Dependents Taxes	Direct Deposit DirectDepositElection Notes	
Personal			
Field Changed	New Value	Old Value	1
✓ Modified DateTime::5/3/20 constant	16 12:51:00 PM	a should we have a prover	لبرس

And here is a view of the entire Audit Change screen:

					<u> </u>
Pers	sonal Info 🔪 Emergency Contact	s Dependents Taxes	Direct Deposit DirectDepositElection Notes		
Pers	sonal				
	Field Changed	New Value	Old Value	ModifiedBy	
~	Modified DateTime::5/3/2016 12:	51:00 PM			
(	Driver's License Expiration	06/30/2017	05/20/2017	One BA	
[	Driver's License Number	877775599	87755888	One BA	
~	Modified DateTime::4/27/2016 9:	41:37 AM			
1	Driver's License State	California		Cooper Bradley	
[	Driver's License Expiration	05/20/2017	01/01/1900	Cooper Bradley	
1	Driver's License Number	87755888		Cooper Bradley	
I	Provider Type			Cooper Bradley	
~	Modified DateTime::4/27/2016 9:	41:37 AM			
1	Marital Status	Married		Cooper Bradley	
~	Modified DateTime::3/23/2016 4:	29:41 PM			
1	Driver's License Country	USA		One BA	
I	Provider Type	N/A		One BA	
~	Modified DateTime::12/16/2015 1	10:19:05 AM			
0	Country	USA		Chevrier Nicole	
I	Last Name	Cooper		Chevrier Nicole	
I	Ethnicity	White		Chevrier Nicole	

To see the changes made to an employee's record (audit history):

1. Click the View Change History link.

C Home > Employees > Personal		-Type to Search-
Previous Employee 64 - Allen, Andrew	Employee: 66 - Cooper, Bradley 🛛 🎸 Show Concealed: 🗎 <u>View All</u>	Next Employee 7 - Alsop, Robert
Personal Info Emergency Contacts	Dependents Taxes Direct Deposit Photo Notes	View Change History

2. The system displays the Audit Change screen showing a record of all changes that occurred on that specific screen corresponding to the tab (**Personal Info, Emergency Contacts, Dependents**, etc.).

Personal Info Emergency Conta	cts Dependents Taxes	Direct Deposit DirectDepositElection Notes	
ersonal			
Field Changed	New Value	Old Value	ModifiedBy
Modified DateTime::5/3/2016 1	2:51:00 PM		
Driver's License Expiration	06/30/2017	05/20/2017	One BA
Driver's License Number	877775599	87755888	One BA
Modified DateTime::4/27/2016	9:41:37 AM		
Driver's License State	California		Cooper Bradley
Driver's License Expiration	05/20/2017	01/01/1900	Cooper Bradley
Driver's License Number	87755888		Cooper Bradley
Provider Type			Cooper Bradley
Modified DateTime::4/27/2016	9:41:37 AM		
Marital Status	Married		Cooper Bradley
Modified DateTime::3/23/2016	4:29:41 PM		
Driver's License Country	USA		One BA
Provider Type	N/A		One BA
Modified DateTime::12/16/2015	5 10:19:05 AM		
Country	USA		Chevrier Nicole
Last Name	Cooper		Chevrier Nicole
Ethnicity	White		Chevrier Nicole

Click on any of the tabs on the Audit Change screen to view the related changes.

Note: You can print the Change History by clicking on the printer icon located in the upper right of the Audit Change screen

# Employee-Personal

The Employee – Personal menu category item has the Personal Info screen and the following additional tabs: Emergency Contacts, Dependents, Taxes, Direct Deposit, Photo, and Notes. Each is described below.

Personal Info	Emergency Contacts	Dependents	Taxes	Direct Deposit	Photo	Notes	
							_

## Personal Info

The Personal Info screen contains primary demographic information for an employee, including home address, phone, email information, contact information, Non-Resident Visa info, if applicable, EEO and I-9 Verification information is also stored on this tab.

Previous Employee 013 - sh	nah, helina k Employee: 15 - Oster,	Michael M 🔻 🎸	Show Co	ncealed: View All	Nex	tt Employee 20 - Hard, Kristen I
Personal Info Emerge	ncy Contacts Dependents Taxes Direct Deposit Photo	Notes			View C	hange History
Concealed:		`````				* indicates mandatory fields!
Personal		ľ	Contact Informatio	n		
Common Name			Personal Email : *	notindicated@unknown.com		
Salutation :	Select		Home Phone :	() Unlisted :		
First Name :*	Michael		Cell Phone :	( ) -		
Middle Name :	M		Cellular Service			
Last Name :*	Oster		Provider:	N/A 🔻		
Suffix :	Select					
Legal Name			Non-Resident Visa			
Alias :			Visa Number :			
	Michael		Visa Type:	None		
	M		Expiration Date:			
	Oster					
Suffix:	Select		Driver's License			
Social Security Number			Driver's License			
(SSN):*	198-46-5797		Number: Driver's License			
	2/10/1962		Country:	USA 💌		
	54 years		Driver's License State:	Select		
	Male 👻		Driver's License Expiration:			
	Single 💌				_	
Ethnicity :*	White			Documentation	Add Edit	$\mathbf{O}$
			Citizenship :			
Home Address			Alien Number :			
			Expiration Date -			

To add I-9 information:

- 1. Go to **Employees Personal**.
- 2. Click the Add link found in the IRCA Documentation section of this screen.
- 3. Populate the I-9 screen that displays with the employee information.
- 4. Click Save.

# **Emergency Contacts**

The Emergency Contacts screen allows you to add an unlimited list of contacts for the employee. You can designate a primary contact.

To add an Emergency Contact:

- 1. Go to Employees Personal Emergency Contacts.
- 2. Click Add.
- 3. Enter Emergency Contact information.
- 4. Click Save.

r, Bradley 🔻 🎸 Show Concealed: 🗆 <u>View All</u>
Notes
Same Residence as Employee
Address Line 1:
Address Line 2:
City:
Country:* USA 💌
State:*Select
Zip:*
Medical Condition:



# Dependents

Dependent information, including dependent relationship, birth date, and contact information is listed here.

Previous Employee 64 - A	Previous Employee 64 - Allen, Andrew Employee: 66 - Cooper, Bradley 🔻 🅢 Show Concealed: 🗉 <u>View All</u>							
Personal Info Emerg	ency Contacts Dependents Taxes Direct Deposit Photo Notes							
Dependent		Contact Information						
First Name:*	Baby	Personal Email:						
Middle Name:		Home Phone:						
Last Name:*	Bradley	Cell Phone:						
Suffix:	Select 💌	Regulatory						
Alias:		SSN:						
Salutation:	Select	Birth Date:*						
Home Address	Same Residence as Employee	Age: 3 years Gender:* Male						
Address Line 1:	12 Street of Dreams	Relationship.* Child						
		Imputed Income :						
Address Line 2:		Disabled : 🗹 Smoker : 🗆						
		Student : 🔲						
City:	LaB area d							
Country:*	Hollywood							
State:*	California							
Zip:*	Solutiona Solution So							
	392.10							
Save Cancel								

To add a Dependent:

- 1. Go to **Employees Personal Dependents**.
- 2. Click Add.
- 3. Enter Dependent information.
- 4. Click Save.

Note: Dependents listed on this screen can be used for Benefit Open Enrollment and Life Event changes.

Previous Em	nployee 64 - Allen, Andrew	Employee: 66 - Cooper, Bradley	🔻 🅢 Show Concealed:	View All	Next Employee 7 - Alsop, Rober
Personal li	info Emergency Contacts Depend	ents Taxes Direct Deposit Photo Notes			View Change History
	First Name	Relation	Gender	Age	
	Baby	Child	Male	3 Year 9 months 20 days	
H H	1 ▶ ₩ Page size: 10 ▼				1 items in 1 pages



## Taxes

Federal Tax information can be stored on the Taxes tab. The employee's W-4 form can also be reviewed on this tab by clicking the **View W4 Form** link in the **Federal Taxes** section of the page.

Personal Info Emergency Contac	ts Dependents Taxes	Direct Deposit Photo Notes			View Change History
					* indicates mandatory fields.
Federal Taxes			EE Tax Statuses		
Withholding Status :*	Single	•	Federal Tax Status :	Include - Federal Tax/Income Rej	
Exemptions :*	2		OA SDI Exempt:	No	
Tax Type :*	Regular Amount	•	Medicare Exempt:	No	
Additional Withholdings :			ER Tax Statuses		
FUI Rate Credit :			FUI Exempt:	No	
Override Fed Minimum Wage: :			OA SDI Exempt:	No	
	View W4 Form		Medicare Exempt:	No	
	Save Cancel				

To edit Federal Tax information:

- 1. Go to **Employees Personal Taxes**.
- 2. Update tax information.
- 3. Click Save.

### **Direct Deposit**

Using the **Direct Deposit** tab of the Employees screen, HR Admins, Payroll staff, or managers, acting on behalf of the employee, can create, change, and approve one or multiple direct deposit account requests for the employee, as well as track if the employee waived direct deposit.

When you first display the **Employee – Direct Deposit** tab for an employee, the system will display any already approved direct deposit requests from that employee (**Approved** displays in the **Status** column) or any Pending requests.

	Turner Direct Descrite Dilector Notes		View Change History				
Personal into the ender of the check.  Personal into the week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.  * Indicates many services week directly deposited to your bank account please complete the information requested below.							
Accounts							
STATUS	START DATE	END DATE	DEPOSIT TYPE				
T	Ţ	Ţ	т				
Approved	07/27/2018	08/01/2018	Full Net Deposit				
Approved	08/11/2016	08/11/2016	Full Net Deposit				
Approved	07/06/2016	07/07/2016	Full Net Deposit				
Approved	09/04/2001	05/20/2016	Partial Deposit				
◀ ◀ 1 ► ► Page size: 50 ▼			4 items in 1 pages				



To add a new direct deposit for an employee:

1. On the **Employees – Personal – Direct Deposit** tab for the employee, click the **Add** button.

Personal Info Emergency Contacts Dependents Taxes	Direct Deposit Photo Notes		View Change History
To have your pay check directly deposited to your bank account pleas	as complete the information requested below		* indicates mandatory fields!
Transit/ABA lumber A nine digit number located in the lower left corner of the check.	Account lumber Your bank account number rollows the transit number on the lower left corner of the check.		
Accounts			
Waive Direct Deposit Authorization			
C STATUS	START DATE	END DATE	DEPOSIT TYPE
<b>T</b>	T	T	T
		No Data Available	
Image: State         Image: State         State <td></td> <td></td> <td>0 items in 1 pages</td>			0 items in 1 pages

Result: The system displays the following screen.

Accounts	Accounts								
Status			Start Date	**	Enc	1 Date			
Pending									
2.After add	ling a new row existin	entering bank account numbers. g priority order will change. Anen approving an election.							
	Priority *	Account Type *	Account Name *	Routing Number *	Account Number *	Amount *	Deduction Code **		
	1	Checking	•			100%	Select	•	
	Approve and Submit Save Cancel								

- 2. Notice the system opens a row, with the following defaults:
  - Priority to 1.

When HR Admin, Payroll staff, or managers are creating/changing an employee's direct deposit elections, they can prioritize the order in which accounts the money will be deposited.

- Account Type of **Checking**
- Amount field defaults to 100%.
- The Status field (informational- read only) displays Pending.

You can change the default settings for the **Account Type** and **Amount** fields.

- 3. Select the Account Type, or accept the default of Checking.
- 4. Enter the **Account Name**, **Routing Number**, and **Account Number**. Include all leading zeros when entering bank account numbers.
- 5. When adding a direct deposit, the first line will default to **100%**. When adding a second Direct Deposit Account, in the **Amount** field, enter in either a Dollar Amount or a Percentage. The first Direct Deposit account row will change to **Remainder**.
- 6. Select the **Deduction Code** (the Scheduled E/D Code) that the company has established for direct deposit. The system displays all E/D Code types created and assigned by the employee's company for direct deposits in the **Deduction Code** dropdown list.





💠 Add	Delete									
	Priority *	Account Type *	Account Name *	Routing Number *	Account Number *	Amount *	Deduction Code **			
	1	Checking	000000000	00000000	123456789	100%	D31-Partial Direct Deposit * 🔻			
	Approve and Submit Save Cancel									

HR Admin Approvers/Managers have the ability – within Advanced HR – to associate (map) each employee direct deposit election to the corresponding Scheduled E/D code (**Deduction Code**) for that company within the Approval screen in Advanced HR; the approver/manager is no longer required to go into Evolution Payroll to create the Scheduled E/D Code.

7. Click **Add** to enter another direct deposit account selection for the employee.

🛟 Add	😂 Delete									
	Priority *	Account Type *	Account Name *	Routing Number *	Account Number *	Amount*	Deduction Code **			
	1	Checking	•				Select •			
	2	Checking	▼ 0000000000	00000000	123456789	Remainder	D31-Partial Direct Deposit 1			
Approve and Submit Save Cancel										

#### 8. The system opens a new row at the top.

💠 Add	Add 😂 Delete											
	Priority *	Account Type *	Account Nan	ne* Routing Number*	Account Number*	Amount*	Deduction Code **					
	1	Checking	•				Select V					
	2	Checking	• 0000000000	00000000	123456789	Remainder	D31-Partial Direct Deposit 1					
Approve and Submit Save Cancel												

- 9. Complete the remaining direct deposit account type selection(s) for the employee.
- 10. Select a **Start Date** (required), and an **End Date**, if applicable (optional).

Users with permission to approve Direct Deposit requests can set both the Start Date and the End Date fields to a date in the past, if required. An employee who submits a direct deposit request themselves cannot do this; only approvers. Note that once a Direct Deposit is approved, the Start Date cannot be updated.

11. To approve the direct deposit request, the manager clicks on the **Approve and Submit** button.

Clicking the **Approve and Submit** button changes the status of the direct deposit request from **Pending** to **Approved**. The system displays a "Please Wait" message while it performs a verification to make sure that:

- All **Deduction** (E/D) **Code** Types were selected.
- A **Start Date** was applied. If a Deduction Code (E/D Code) has not been selected for each row or a Start Date has not been entered, the manager receives an error message.

After clicking the **Approve and Submit** button, the system displays the message "Submitting Direct Deposit" and a waiting icon until it completes the process.



The system then changes the **Status** of the direct deposit request to **Approved**.

Or, the user can click the **Save** button to save the changes made to the screen and not submit the form; this does not change the status or the request from **Pending** to **Approved**. The user can come back later to complete the approval process.

Or, the user can click **Cancel** to cancel the approval, this does not save any of the information that was entered on the screen.

Once approved, the employee's direct deposit selections then show a **Status** of **Approved**. The system triggers the request submission form to Payroll. The approver can go to Evolution Payroll and the Employee – Scheduled E/Ds screen to view the Deduction (E/D) codes set up for this employee's direct deposit.

	Q	45 - Cornish, Pl	hil 🔹 🕨									45 -	Cornish,	, Phi
Labor Defaults ACA	A	Add Delete	Export to Excel											
Pay		Code * 🖌 🍸	Description *			Calculation Method *	Amount \$	T	Amount %		Starting *	T	Ending	
Federal		D20	401k			Fixed					08/18/2015			
State	4	D30	Net Pay Direct Deposit			None					08/10/2016			
Local		Basic Schedule	Limits Thresholds											
Child Support		Starting			Pa	ayrolls Affected			Block Based On					
Direct Deposit		g 08/10/2016		1	A to	di		•	Section Define	d			Ŧ	
Scheduled E/Ds		Ending		m		equency every Pay		τ.	Weeks blocked	3 4	5			
Delivery														
Time Off Accrual	+	D31	Partial Direct Deposit 1			% of Net			50		08/10/2016			
Notes		D32	Partial Direct Deposit 2			Fixed	12				08/10/2016			
		M30	401(k) Employer match			Fixed					08/18/2015			

After the approver clicks the **Approve and Submit** button, if the Employee then goes to the Port they can then see that their direct deposit request has now been approved. Note that in a future release, we will be adding a notification to the employee that their direct deposit request has been approved.

Payroll			
Pay History Tax Docur	ments Direct Deposit		
Direct Deposit			
🜵 Request a change 😫 Delete			
STATUS	START DATE	END DATE	DEPOSIT TYPE
Approved	08/10/2016		Partial Deposit
◀   ◀   1   ▶   ▶   Page size: 5	<b>v</b>		

#### **Direct Deposit rules**

There are some direct deposit rules that it is important to be aware of:

• When the user adds a new row into the Direct Deposit screen, by default, the system will set the Priority of the new row to **Priority 1**. The user can change the Priority.

Priority *	Account Type *	Account Name *	Routing Number *	ł	Deduction Code **	Ż
1	Checking	•			Select	
 2	Checking	▼ checking	123123123		Select	5
			Approve and Submit Save	Cancel		3
		the parameter	and made at	and the grants	and the second	

• The **Remainder** amount is always the **Last** priority in the direct deposit elections.



Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount
1	Savings	Savings	123123123	321321322	Dollar	\$1000
2	Checking	Checking2	123123123	321321323	Dollar	\$12
3	Checking	Checking	123123123	321321321	Percent	Remainder

The user cannot change the **Priority** of the **Remainder** election.

 The Company sets the limit on the amount of E/D Codes (Deduction Codes) that can be used for its employee's direct deposits. The employee cannot exceed the number of direct deposit elections than the number of E/D Codes that the company has set up and allowed for this purpose.

#### Advanced HR

Your employer only allows 3 direct deposit accounts and one paper check to be configured. You have reached the maximum allowed.

So, for example, if the Company has set up and allows 3 E/D Codes for direct deposit, than the employee cannot exceed that number

of their direct deposit elections. If the employee exceeds the number of account requests above the number that the company allows, they will receive a message informing them of that this is not allowed. Either, if Paper Checks are not allowed for this company: "Your employer only allows 'n' direct deposit accounts to be configured. You have reached the maximum allowed." Or, if Paper Checks are allowed for this company, then "Your employer only allows 'n' direct deposit accounts to be configured. You have reached the maximum allowed." Or, if Paper Checks are allowed reached the maximum allows a paper check."

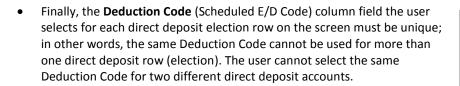
**Note:** The **Issue Paper Check** option (in the **Account Type** column field) does not require an E/D Code (Deduction Code), so it does not count toward the maximum number of direct deposit elections the employee can have.

So, if a company allows for 3 direct deposit E/D Codes, they can elect 3 different account types, plus an Issue Paper Check option for a total of 4 account types direct deposit elections (as long as Paper Checks are allowed).

• The **Issue Paper Check Account Type** option will always be the second to the last **Priority** item. The reason for this it the specific way that we submit payrolls in Evolution and create direct deposits and not by an associated E/D for the paper check (that is, the **Take Home Pay** field value in Evolution Classic).

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount	Issue Paper Check is always 2nd to last priority
1	Savings	Savings	123123123	321321322	Dollar	\$1000	2nd to last phoney
2	Checking	Checking2	123123123	321321323	Dollar	\$12	Remainder is always last
3	Issue Paper Check					\$150	priority
4	Checking	Checking	123123123	321321321	Percent	Remainder 🥌	

**Direct Deposit Priority Rules** 



Deduction Code **
D08-Direct Deposit
Select
Select
D08-Direct Deposit
D09-Direct Deposit Net

FVOlut

## Photo

The employee's photo is stored on the Photo tab.

Select Photo: *	Choose File		
8			
(Ideal Size:- Width: 269)	ox; height: 338 px;)		
(Maximum file size allo	wed: 100KB)		
(Recommended file for			

To select a photo to attach to an employee's record:

- 1. Go to **Employees Personal Photo**.
- 2. Click Choose File.
- 3. Select the file.
- 4. Click Save.
- 5. Click **Delete Image** to remove the photo.

**Note:** The ideal photo size is 269W x 338H (in pixels). The maximum file size allowed is 100KB, the recommended file format is JPEG.

### Notes

Employee notes can be stored on this screen. Examples include employee meetings, performance related notes, and manager comments. Attachments can be included in each note.

Personal Info Emergency Contacts	Dependents Taxes Direct Deposit P	Photo Notes			ViewC	hange History
🖨 Add 😫 Delete						
Name	Attachment	Notes	Date Created	Time	Created By	
T	T			7	T	
			No Data Available			
H + 1 > > Page size: 5 -						0 items in 1 pages

To add a note to an Employee Folder:

- 1. Go to **Employees Personal Notes**.
- 2. Click Add.
- 3. Enter the **Note Title** and Contents.
- 4. Click Save.



Personal Info Emergency Contacts I	Dependents Taxes Direct Deposit Pho	oto Notes
Notes Editor		
Note Title: * Performance		
'Times New R • B I U abc Size A	• & •   = = = = = := (= (s)	
Abigail is an exceptional worker.		
🥜 Design 🔇 HTML 🔍 Preview		
Documents		
Document Title:	Document ID:	Document File: Choose File
Save Cancel		

# **Employee-Benefits**

To view a list of benefits an employee is enrolled in, click on **Benefits** to display the **Employees – Election Summary** screen.

PERSONAL	EMPLOYMENT	TALENT MANAGEMENT	EMPLOYEE FOLDER	Recently Viewed Employees
Emergency Contacts	Pay	Certifications & Licenses	EMPLOYEE SNAPSHOT	-
Dependents	Worker's Comp	Training Employee View	ASSETS	Brown, Abigail
Taxes	Discipline			
Direct Deposit	Points			
Photo	FMLA/LEAVE			
Notes	CUSTOM FORM			
BENEFITS				

Enrollment in plans, either due to new hire enrollment, life event, or open enrollment period, can be accessed from this screen.

C Home > Employe	ees > Electio	n Summary					-Type to Sea	irch-	• Advanc	ed Search M	y Saved Searches
Previous Employee					Employee : Abigail Brown-23	* <del>0</del>	Show Concealed: View Al	!			Next Employee Adam Rees-31
Current and Pendin	ig Benefit B	Elections									
Employee	EE ID	Туре	Provider	Plan	Primary Care Provider	Coverage Level	Coverage Value	Effective Date	Monthly Rate	Enrollment Typ	e Enrollment Status
Brown Abigail	23	Medical	Cigna	Cigna - High Deductibl	9	EE + Children	\$0.00	2016.01.01	\$140.5	OE	Complete
Brown Abigail	23	Dental	Cigna	Cigna - Dental		EE + Children	\$0.00	2016.01.01	\$15.1	OE	Complete
Brown Abigail	23	Vision	Cigna	Cigna - Vision		EE	\$0.00	2015.01.01	\$4.01	OE	Complete
Brown Abigail	23	Voluntary Life	Aetna	Voluntary Life		Employee	\$10,000.00	2016.01.01	\$250.01	OE	Complete
Brown Abigail	23	401k	John Hancock	401K		Single	\$10,000.00	2016.01.01	\$0.01	OE	Complete
Employee	tions EE ID	Туре	Provider	Plan	Coverage Level	Coverage Value	Effective Date		Monthly Rate	Enrollment Type	Enrollment Status
Brown Abigail	23	Voluntary Life	Aetna	Voluntary Life	Employee	\$76,500.00	pending Approval of EO	N	\$1,912.50	OE	Complete
Helph	Page size	5 -									1 items in 1 pages
Elect Benefits											
Eligibility is closed unle	ess you hav	e a Life Status Change o	r during an Open Enrolli	nent period.							
New Hire Enrollmer				Not Available							
Life Status Change				<u>Make a Life S</u>	tatus Change						
Open Enrollment				Open Enrollm	ent 1/1/2015 to 12/31/2016						



Employees can enter/modify benefits by utilizing one of the following three options:

Option	Description
New Hire Enrollment	If the employee is a new hire, the employee or administrator can utilize "New Hire Enrollment" to add/edit benefits.
Open Enrollment	Administrators can configure open enrollment timeframes using benefit classes, and during this time employees and administrators can edit and update employee benefits.
Life Status Change	Life Events, such as marriage or birth of a child, can be configured for benefits. Enrollment rules and available benefits for each type of life event can also be configured. Employees and administrators can enroll employees into benefits utilizing the Life Status Change link on the benefit screen.

# **Employees - Employee Payroll**

The Employee Payroll screens are where you set up specific information needed for Payroll within Advanced HR.

To display the Employee Payroll screens for an employee, go to Employees – Employee Payroll.



The system displays the Employee – Labor Defaults screen for the employee you were on.

X	45 - Cornish, Phil 🔻	>					45 - Cornish, Ph
abor Defaults	Worker's Compensation			Division	Branch	Department	Team
ACA	- Select Worker's Compensation -	*		Shelburne Inn	Hotel	Front Desk	
	Job		19				
Pay 5	- Select Job -	*	Le				
Federal State	Union		nal				
		*	zatio				
Local			Organizational Level				
child Support	- Select Pay Group -	*	õ				
irect Deposit	General Ledger Tag						
heduled E/Ds							
Delivery	Tipped Directly *						
	No	*					
ne Off Accrual	Ignore FICA on Cleanup Payroll *						
Notes	No	•					
	Combine Returns On This EE *						
	Yes	*					
ti	Generate Second Check *						
us Next early and the second s	No	•					
	Deductions to Take First "						
	Child Support, Garnishment	•					
	Second Check Template						

Click on the navigation menu items on the left side of the screen to go to any of the Employee Payroll screens – ACA, Pay, Federal, etc., for that employee. You can use the Employee dropdown field at the top of the screen to go to the Employee screens for a different employee.

You can also click on the right and left arrows to navigate to the Employee Payroll screen for the next or previous employee.

Q	45 - Cornish, Phil	•	>
-	39 - Chapman, Diane		1
	- See 40 - Smith, Melanie		t
	41 - Hill, Tim		t
ы	Job - Sele 42 - King, Yvonne		Ŀ
nati	43 - Davies, Christopher		H
Salary Information	Union44 - Edmunds, Sebastian		Ŀ
y In	45 - Cornish, Phil		Ŀ
alar	Pay Bi 46 - Thomson, Gordon		L
Ň	- Se <mark>le</mark>	_	

## **Employees - Labor Defaults screen**

Worker's Compensation		Division	Branch	Department	Team
- Select Worker's Compensation -	Ŧ	Shelburne Inn	Hotel	Front Desk	
Job	e				
- Select Job -	rev *				
Union	nal				
- Select Union -	* zatio				
Pay Group	Cranta Contraction Contra				
- Select Pay Group -	* 50				
General Ledger Tag					
Tipped Directly *					
No	*				
Ignore FICA on Cleanup Payroll *					
No	*				
Combine Returns On This EE *					
Yes	Ŧ				
Generate Second Check *					
No	*				
Deductions To Take First *					
Child Support, Garnishment	*				
Second Check Template					

- 1. Complete the required and applicable fields.
- 2. In the Organization Level tree, use the arrows to drill down to the organization level. Select the appropriate level for this employee.
- 3. Press the **Tab** key or click the **Next** button when you complete entering information on this screen.
- 4. Result: The Employees Pay screen opens.

### **Employees - ACA screen**

The ACA screen in Employee Payroll is where the ACA Information is displayed. When adding new employees, Company Default information will be used.

Q	🖌 45 - Cornish, Phil 🔹 🖌		45 - Cornish, Phil
Ť	ACA Status * Full Time	ACA Standard Hours	
	ACA Coverage - Select ACA Coverage -	Applicable Section 4980H - Select Applicable Section -	
ACA	ACA Benefit - Select ACA Benefit - •	Lowest Cost Benefit - Select Lowest Cost -	
	ACA Policy Origin B. Employer-Sponsored Coverage	•	
	Benefits Eligible * No *		
	Form on File *		
bui	No   ACA Format*		
Reporting	Both *		
	1095B *		

## Employees - Pay screen

The Employees Pay Screen contains information about the rate of pay, Jobs, and D/B/D/T information for a particular rate of pay. If the employee has multiple pay rates, these can be assigned here. Hourly Employee wages are managed through this screen.

To update the rate of pay:

- 1. Select the rate amount.
- 2. Update the amount.
- 3. Select Jobs, Workers Comp, and D/B/D/T information as needed.
- 4. Click on **Add** to create additional rates.
- 5. Use the Diskette icon to save the changes.

	4	\dd	Delete	Export to E	Excel					Edit Effe	ective Period(s)
			Primary *		т		Rate Nu	mber * 🔺	T	Rate Amount *	т
			Yes					1		\$19.00	
		Jobs	Number				• de	Code			
		- Se	lect Jobs Numb	oer -		۳		- Select Code -		*	
			Grade Position					Description			
			lect Pay Grade	Position -		۳	Workers				
000			Grade				Vort	State			
		- Se	lect Pay Grade	-		*	>				
			Division		Branch			Department		Team	
		Organizational Level									
		organizati									



### Shifts Sub-menu

Shifts must be already created in Evolution by the Service Bureau, after which they can be applied to employees in Employee Payroll. Some employees may be assigned multiple shifts.

🖾 🖌 45 - Cornish, Phil	• >				45 - Cornish, P	hil
Add Delete						
Shift*		Shift Rate	7	Shift %	Default	7
						*

Complete the required and applicable fields.

#### Piecework Sub-menu

The Piecework screen is where piecework items are set up and applied to employees. Before these can be applied to employees, the piecework items must be set up in Evolution at the Client level.

🖸 🖌 45 - Cornish, Phil 🔹				45	- Cornish, Phil
Add Delete Piece *		Rate Amount	-	Rate Quantity	-
- Hitce -	1	Falle Amount	7	Rate Quantity	

Complete the required and applicable fields.

### Auto-Labor Distribution

Use the Auto-Labor distribution submenu to add or update any Auto-labor distribution needed for payroll.

Ø	45 - Cornish, Phil 🔹	>							45 - Cornish	ı, Phil
(0	Labor Distribution Options * Distribute Both	•		Add Delete						
Settings	Auto Labor Distribution E/D Group			Percentage *	Organ	nizational Level 🛛 🕈	Jot	b≜ T	Workers Comp	T
	- Select Auto Labor Distribution E/D Group -	•								<u>^</u>
			E							
		:	Allocation							
		:	Allo							
										-
				Total:						
									No items to	display

- 1. Select the Labor Distribution Options to distribute Taxes, Deductions, All, or None.
- 2. Select the Auto-labor Distribution E/D group.
- 3. Use the **Add** button to add Organizational Levels, Jobs, and Workers Comp codes to the Auto Distribution list.

4. Use the Diskette icon to save the changes.

Note: The Percentage must total 100% in order to save the updates.

## **Employees - Federal screen**

The Federal screen contains information for W-2 settings within the payroll functionality. Federal Taxes are maintained within the Advanced HR – Employee – Personal – Taxes section.

3	45 - Cornish, Phil		· >					
	Type * W-2		Residential State *			Distribution Code		
	First Name				1099R	Tax Amt Determined * No	<u>Total *</u> No	
W2 Form	Middle Name				10	Pension Plan * None		
W2	Last Name							
	Name Suffix							
	Deceased *		Statutory EE *					
sbi	No	٣	No Defensed Comm *	٣				
W2 Settings	Legal Rep * No	•	Deferred Comp * No	•				
W2	Pension * No	•						

- The W2 Form section allows you to override the address that will print on the W2.
- The **W2 settings** displays information that will show in specific fields of the W2.
- The **1099R** section allows for specific information for the 1099 R.

### **Employees - State screen**

State Taxes are currently managed within Employee Payroll. This allows for multiple states to be selected and setup for Payroll purposes.

Q <	45 - Cornish, Phil	· >								45 - Cornish, Phil
Add	Delete									Edit Effective Period(s)
	State * 🔹 🔻 🔻	SUI *	T	SDI	T	Home *	r	Marital Status *		Tax Exemptions T
	VT	VT		VT		Yes		Single		0
	County		Method			State Tax		SDI Exempt		Тах Туре
			Take None		•	Include		Include v		None 👻
	Salary Type		To State			SDI Exempt		SUI Exempt	es	Minimum Wage
	N/A	•	- Select To State -	Ŧ		S Include	Ŧ	S Include •	errides	
	Calc SUI Taxable 1099 Wag	es	Reci			SUI Exempt		ř X	0	
	Work At Home	Tax Code				Include	Ŧ	ш		
	No v									

Click the small arrow(s) at the far left of the line on the information bar to minimize or maximize the state information. Users may also double-click the small arrow(s) to expand the information.

Click the **Add** button to add another state as needed, or click the **Delete** button to delete a state from the employee's record.

## **Employees - Local screen**

0	45 - Cornish, Phil		· >								45 - Cornish	ı, Phil
Add	Delete										Edit Effection	ve Period(s)
	State * •	T	sui *	T	SDI	T	Home *	T	Marital Status *	T	Tax Exemptions	T
+	VT		VT		VT		Yes		Single		0	*

Click the **Add** button to add another local as needed, or click the **Delete** button to delete a local (if, for example, the employee moved) from the employee's record.

## **Employees - Child Support screen**

		45 - Cornis	sh, Phil			· >										45 - Cornish	ı, Phil
[	Add	Delete															
	Priority *	*	<b>T</b>	Case #	T	State Origin	T	Medical Eligible *	T	Agency	T	Arrears *	٣	FIPS	T	Custom Field	T
																	<u>^</u>

If the employee owes Child Support, the Child Support case information is displayed on this screen. Child Support cases should be added by first adding the Scheduled E/D and adding the case information there.

Child support cases can be added manually here by clicking on the **Add** button if needed.

## **Employees - Direct Deposit screen**

Users can add, delete, and view direct deposit information. Direct Deposit Account information can be added or edited in this menu. When an employee requests a change in Advanced HR, the manager or administrator can come here to update the account information as needed.

H X	<b>C</b> , <b>〈</b> 45	- Cornish, Phil	- >								4	15 - Cornish, Phi
Labor Defaults	Add	Delete										
ACA Pay	ABA #* ▼	Bank Account # *	▼ Account Type *	Ŧ	Branch Identifier	T	Addenda	T	In Prenote *	T	Form on File *	T Allow Hyphens * T
Federal	000000000	6500	Savings						Yes		No	No
State	000000000	6576	Checking						Yes		No	No
Local	000000000	6600	Checking						Yes		No	No
Child Support												
Direct Deposit												
Scheduled E/Ds												
Delivery												
Time Off Accrual												
Notes												

**Important:** Adding a Direct Deposit account here does not create the Scheduled E/D. To add a Scheduled E/D, use the Employee – Personal – Direct Deposit screen instead (which now allows the approver to select the Scheduled E/D Code (Deduction) code for each direct deposit election. Note that If you add a direct deposit using the **Employees – Direct Deposit** screen (in Advanced HR), the system will create the Scheduled E/D (Deduction) code.

## **Employees - Scheduled E/Ds screen**

Users can add, delete, and view Scheduled E/Ds on this screen. Click the small arrow(s) at the far left of the line on the information bar to minimize or maximize the information. Users may also double-click the small arrow(s) to expand the information.

Code * 🔺 🛛 🔻	Description *	T	Calculation Method *	T	Amount \$	T	Amount %	T	Starting *	T	Ending	T
D20	401k		Fixed						08/18/2015			
D30	Net Pay Direct Dep	osit	None						08/10/2016			
asic Schedule	Limits Thresholds											
Code		Description			Always Pay/Deduct				Deductions to Zero			
D30	•	Net Pay Direct Dep	osit		All Payrolls		*		Yes			
Priority		Calculation Link			Deduct Whole Check				Take Home Pay			
		- Select E/D Group -		•	Yes		Ŧ					
Calculate Using					Send To							
Method defined for this	E/D			*	Direct Deposit							Ŧ
Calculation Method		Amount \$			Direct Deposit Acc	count						
None	v				6600						•	
E/D Group		Amount %			Reference to Disp	lay on Chec	k					
- Select E/D Gro	- vip -											

•	45 - Cornish, Pl	hil 👻 🕨									45	- Cornish,	Phi
Add	d Delete	Export to Excel											
	Code * → 🛛 🝸	Description *	T	Calculation Method *	T	Amount \$	T	Amount %	T	Starting *	T	Ending	Т
	D20	401k		Fixed						08/18/2015			
	D30	Net Pay Direct Deposit		None						08/10/2016			
	D31	Partial Direct Deposit 1		% of Net				50		08/10/2016			
	D32	Partial Direct Deposit 2		Fixed		12				08/10/2016			
	M30	401(k) Employer match		Fixed						08/18/2015			

Scheduled E/Ds are earnings and deductions that are scheduled to be processed automatically with every payroll. E/D Codes are separated into three categories - Earning Codes, Deduction Codes, and Memo Codes.

The table below identifies some of the most common E/D Codes that are and those that are not considered Scheduled E/Ds.

E/D Code Type	E/D Code Type	Scheduled E/Ds?
Benefits/Deductions	Health Insurance; Dental Insurance; EE 401(k) contributions, EE 401(k) catch-up contributions, Flexible Spending Accounts, Dependent Care	Yes
Memo Codes (money that is set aside by the employer for the employee)	401(k) match, ER paid insurance contributions	Yes
Direct Deposits	Employee bank accounts	Yes
Agency-paid	Child support, garnishments, tax levies	Yes
Static Earnings	Auto allowance, severance pay	Yes
Loan Payments	401(k) loans, company loans	Yes
Salary		No



E/D Code Type	E/D Code Type	Scheduled E/Ds?
Hourly		No
Sick		No
Vacation		No
Paid Time Off		No
Bonuses		No

To set up employee-level Scheduled E/Ds:

1. Click the **Add** button to add a Scheduled E/D, or click the **Delete** button to delete a Scheduled E/D from the employee's record.

asic Schedule Limits	Thresholds							
Code		Description		Always Pay/Deduct		Deductions to Zero		
D1	*	Direct Deposit - Partial 1		No	*	No		
Priority		Calculation Link		Deduct Whole Check		Take Home Pay		
			*	No	*			
Calculate Using				Send To				
Method defined for this E/D			*	Direct Deposit				
Calculation Method		Amount \$		Direct Deposit Account				
Fixed	*	25.00		30287555			*	+
E/D Group		Amount %		Reference to Display on Check				
	*							

\* After a selection is made in the **Send to** field, an additional field opens below, depending upon the selection:

Always Pay/Deduct	•	Deductions to Zero No		Ŧ
Deduct Whole Check		Take Home Pay		
No	Ψ.			
Send To				
Agency				*
Agency Name				
Health Insurance Admin			•	
Reference to Display on Check				

• Agency - when Agency is selected in the Send To field, a dropdown field opens below, where the user selects the Agency.

Always Pay/Deduct		Deductions to Zero	
No	*	No	
Deduct Whole Check		Take Home Pay	
No	•		
Send To			
Client/Company			*
Reference to Display on Check			

• **Client / Company** – When Client / Company is selected.

Always Pay/Deduct		Deductions to Zero		
No	*	No		Ψ
Deduct Whole Check		Take Home Pay		
No				
Send To				
Direct Deposit				•
Direct Deposit Account				
- Select Direct Deposit -			•	+
Reference to Display on Check				

- Direct Deposit when Direct Deposit is selected in the **Send To** field, a dropdown field opens below, where the user selects an account number, or clicks the **plus** sign to add a new account number.
- 2. Click the **Schedule** tab when this screen is complete. Complete all of the applicable fields.

4	D1	Direct Deposit - Partial 1			Fixed	25		02/17/2015	
	Basic Schedule	Limits Thresholds							
	Starting				Payrolls Affected			Block Based On	
	<u>9</u> 02/17/2015		<b></b>	ts	All	*	Sk:	Custom Defined	
	Ending			ffec	Frequency		Bloc	Weeks blocked	
	Ending			A	Every Pay	*		0 1 0 2 0 3 0 4 0 5	

3. Click the Limits tab when this screen is complete. Complete all of the applicable fields.

Basi	s Schedule Limits Thresholds				
	ED Graup		ED Group	Amount ED Group	
	- Select E/D Group -	•	- Select E/D Group -	- Select ED Group -	
State	Pay Period %		Pay Period %	Hours ED Group	
Ę				- Select E/D Group -	
2	Pay Period 5	5	Pay Period 5	 Hourly Rate	
		avin			
		M	EE Amual S		
			Citert Annual 5		

4. Click the **Thresholds** tab when this screen is complete. Complete all of the applicable fields.

Basic	Schedule Limits Thresholds				
	Action			E/D Group	
	None	*	-sp	- Select E/D Group -	*
	Remaining		Thresholds	Amount \$	
Targets	Balance Taken		The	Use Pension Limit	
	Amount 5				

5. Click **Save** when you have completed entering information on this screen.

## **Time Off Accrual**

The Employee Payroll – Time Off Accrual screen allows you to add or modify Time Off Accrual Plans for an employee. This does require that Time Off Accrual is set up for the company in Evolution.

	3, <	45 - (	Cornish, Phil		· >											45 -	Cornish, I	Phil
Í	Add	D	lelete											Overrides				
	Active *	T	Type *	T	Balance *	T	Used *	T	Accrued *	ΥE	ffective Date 🛛 🔻	Accrual Max	۲	Rate	٣	Rollover Type	▼ Rollover Dat	e 🍸
	<ul> <li>Yes</li> </ul>		Vacation		5.00		0.00		5.00									*
	<ul> <li>Yes</li> </ul>		Sick		21.00		6.00		27.00									

- 1. Click the **Add** button to add a plan to an employee.
- 2. Select the plan **Type**.
- 3. Update the **Used** and **Accrued** amounts for the plan. The balance will calculate automatically.
- 4. To edit amounts on the plan, select the **Used** or **Accrued** amounts and edit. You will be prompted for an Edit Reason.
- 5. Use the Arrow next to each plan to see line item adjustments that have been made to plans, both automatically through payroll and manually.

### Notes

C,	45 - Cornish, Phil	• >	45 - Cornish, Phil
tes			
Payroll Notes			

## Delivery

Ø	45 - Cornish, Phil	· >		45 - Cornish, Phil
	Print Voucher Yes			
Payroll Override Address				
	Payroll Check Mail Box	EE Electronic Return Mail Box	Password for VMR Deliveries	
	Colort Moll Rev	• Select Mail Box - •		
VMR	EE Report Mail Box	2nd EE Report Mail Box		
-	- Select Mail Box -	• Select Mail Box - •		

## **Employee-Employment**

### **Employment**

The Employment screen contains employment profile information, such as employment dates, job title, and work contact information. Government regulatory information, such as Vets 100 and Worker's Compensation information, is also stored on this screen. The employee's manager can also be added on this screen, provided the organization doesn't have Position Management turned on.

ployment Pay	Worker's Comp Discipline Points FMLA/LEAVE	View Change
		* indicates mandato
Employment Profile		Employment Dates
Change Reason:	Select	Hire Date: 1/1/2011
Status:*	Active	Original Hire Date:
Position Status:*	Full Time	Seniority Date:
rpe:	W-2	Term Expiration Date:
nployee Number:*	01	Termination Reason:
me Clock Number:		Last Paid Date:
ob Title:*	Vice President - Engineering	Last Pay Raise:
ob Cost Number:	Select	Last Promotion:
aining Track:	Select	Last Review Date:
enefit Class:	Select	Next Review Date:
ob Class:	Select	New Hire Report Date:
SA Exempt :	No	New Hire Reported:
ork Phone:	(093)453-4544 Ext	
ork Email:*	notindicated@unknown.com	
wipeClock Pin/Login:	manageboth	HR Profile
K to Rehire:	8	Reports To:Select
		LOA (Years):
roup Term Policy		Other Experience
roup Term Policy mount:		(Years):
mount: TL Hours:	\$4,566.00	Previous Experience (Years):
	345	
TL Rate:	\$34.00	Veteran Profile
		Veteran: O Yes O No

**Note:** If Position Management is turned on, the Reports To field hierarchy is created in Administration – Positions. Fields that are dependent upon positions being enabled will be grayed out if Position Management is turned on.



Here is a closer look at each of the sections on the Employment screen.

### **Employment Profile**

Employment Profile		
Change Reason:	Select	•
Status:*	Active	•
Position Status:*	Full Time	•
Туре:	W-2	•
Employee Number:*	01	
Time Clock Number:		
Job Title:*	Vice President - Engineering	•
Job Cost Number:	Select	-
Training Track:	Select	•
Benefit Class:	Select	•
Job Class:	Select	•
FLSA Exempt :	No	•
Work Phone:	(093)453-4544 Ext	
Work Email:*	notindicated@unknown.com	
SwipeClock Pin/Login:	manageboth	
OK to Rehire:		

#### **Employment Dates**

Employment Dates		
Hire Date:	1/1/2011	
Original Hire Date:		
Seniority Date:		
Term Expiration Date:		
Termination Reason:	Select	<b>~</b>
Last Paid Date:		
Last Pay Raise:		
Last Promotion:		
Last Review Date:		
Next Review Date:		
New Hire Report Date:		
New Hire Reported:		

### **Group Term Policy**

Group Term Policy	
Group Term Policy Amount:	\$4,566.00
GTL Hours:	345
GTL Rate:	\$34.00

#### HR Profile and Veteran Profile

HR Profile	
Reports To:	Select
LOA (Years):	
Other Experience (Years):	
Previous Experience (Years):	
Veteran Profile	
Veteran: 🔍 Yes 🖲 No	
Disabled Veteran	Armed Forces Service Medal Veteran
Other Protected Vet	eran 🔲 Vietnam Era Veteran



## Pay

Pay information can be found on the Pay tab. This tab will display different fields for Salary and Hourly employees:

• When editing an **hourly wage employee**, Pay Rates must be updated through the Employee Payroll – Pay menu.

Change Reason :*		Change from hourly to salary
Pay Type :*		Hourly
Pay Frequency :*		Weekly
PRIMARY	RATE NUMBER	RATE AMOUNT
Yes	1	\$20.00
Standard Hours :		
Pay Per Check :		

• Salaried Employees wage amounts are entered here on the Employee – Employment – Pay menu.

Change Reason :*	Change from salary to hou	rly 🔻
Рау Туре :*	Salary	•
Pay Frequency :*	Weekly	•
Compensation :	\$1,500.00	
Annualized Pay :	\$78,000.00	
Standard Hours :	40.00	
Hourly Equivalent :	37.50	
Wage Limit :	\$0.00	
Wage Limit Frequency :*	Every Pay	•

## Workers Comp

In Advanced HR, you can keep track of your Worker's Comp Cases for each employee.

- 1. Go to Employees Employment Worker's Comp tab.
- 2. Click on Add.

Employment Pay Worker's Comp Discipline Points FMLA/LEAVE				
🕆 Add 😂 Delete				
Case No	Medical Costs	Advisor	Incident Date	
1	2300	N. Gilbert	01/01/2016	
Here     Page size:     5     1       1     1     1     1				

- 3. Complete all pertinent information.
- 4. Click **Save** when complete.

Utilities Setup					
			-Type to Search-	Advanced Search	My Saved S
Employee: Abigail Brown-23	▼ <b>€</b>	Show Concealed:	<u>View All</u>	Next Employee Ac	lam Rees31
LEAVE					ange History
			Incident Details	* indicates manda	tory fields!
Incident Date:*	1/1/2016	Not Reported	1. Name the Worksite location where the incident occurred. Burlington office		
Incident Time:	10:25:00 AM				
Case Closed On:			<ol><li>What was the employee doing just before the incident occurred tools ,equipment or material the employee was using prior to the indication of the ind</li></ol>	I? Describe the activity ,as incident .	well as the
Job Title:	Trainer-189		She was driving a forklift		
Filed On:			3. Tell us how the incident occurred.		
			She drove the forklift off the loading dock.		
ss 🔍 Other Illness					
			Injury / illness Details		
rdable asses			1. Describe the part of the body the was affected , be specific		
i dable cases			Right Arm and Shoulder were injured		4
			2. What object or substance directly harmed the employee.		
			Falling from the dock to the Ground/Forklift		
			3. Internal Notes(Not included on the Worker's comp report).		
					li.
·					
	Incident Date." Incident Time: Case Closed On: Job Title:	Employee: Abigail Brown-23	Employee: Abigall Brown-23   EAVE  LEAVE  LEAVE LEAV	-Type to Search	-Type to Search     Advanced Search     MaxLEmployee     Abigail Brown-23     Yew All     Not Reported     Incident Date:     /// 2016     // 2016

## Discipline

Advanced HR can help you track discipline for your employees. When adding a Disciplinary report:

- 1. Go to **Employees Employment Discipline** tab.
- 2. Click on Add.
- 3. Enter the following information:
  - Infraction Type
  - Discipline Communication method
  - Discussion Date
  - Action Taken
- 4. Click **Save** when complete.

Employment Pay Worker's Con	np Discipline Points	FMLA/LEAVE
Employee Discipline Report		
Infraction Type:*	Job Performance	•
Discipline Communication Method:*	Oral	•
Discussion Date:*	12/9/2015	
Action Taken:	Spoke to her.	
Save Cancel		

**Note:** The Infraction Type and Communication Method field values can be added in the Default Table Setup under the Employment Profile section – Discipline Plan.

## Points

If the organization uses a point system, such as points for tardiness or missed work time, points by infraction can be stored on this tab.

Points         Date:*       1/19/201€ Ⅲ         Reason:*       Late without calling ▼         Comments:       Did not show up for work until 11am.	
Date:*     1/19/201€ Ⅲ       Reason:*     Late without calling ▼       Comments:     Did not show up for work until	
Reason:* Late without calling  Comments: Did not show up for work until	
Comments: Did not show up for work until	
Did flot show up for work until	
Save Cancel	

**Note:** To utilize the Points, reasons must be added in the Default Tables Setup – Employment Profile – Points – Reason.

### FMLA/Leave

The Family and Medical Leave Act (FMLA) entitles eligible employees of covered employers to take unpaid, jobprotected leave for specified family and medical reasons. FMLA/Leave information is entered into Advanced HR on the **Employees – Employment – FMLA/Leave** tab.

To enter FMLA/Leave information:

- 1. Click the **Add** button to enter a New FMLA/Leave record.
- 2. On the **Request Information** tab, enter the **Date Received** and any other information that is available. This record can be updated as needed.
- 3. Use the Attachment section to upload any needed attachments.

Employment Pay	Worker's Comp Disci	oline Points	FMLA/LEAVE		View Change History
Add 😫 Delete					
Request Informa	ation Leaves				
Request Information					
Date Received:*	Ē			Date Designation Notice Sent:	
Date Approved:	<b></b>			Designation Notice Sent By:	
Certification Type:	Not Specified	~		Date Notice Of Eligibility Sent:	
Certification Sub Type:	Not Specified	~		Notice Of Eligibility Sent By:	
Certification Class:	Certified	$\nabla$		Date Certification Form Sent:	
Certification Notes:				Certification Form Sent By:	
Leave Type:	Continuous	$\nabla$		Certification Form to be Returned By:	
Days Used:	0			Date Certification Form Returned:	
Attachment:		Select		Certification Form Returned By:	
	Reset Current File:				
Save	Cancel				

4. On the Leaves tab, click Add new record to enter the leave start, and return to work dates.

Request Information	Leaves			
Leaves				
+ Add new record				🖒 Refresh
	LEAVE START DATE	ESTIMATED RETURN TO WORK DATE	ACTUAL RETURN TO WORK DATE	
✓ ×	(III)	(III)	(III)	
No records to display.				
	Page size: 20 V		0 iter	ems in 1 pages
Save Can	icel			

- 5. Use the  $\square$  button to save the Leave record.
- 6. Click on **Save** when complete.

**Note:** The Leave tab will not save a Leave unless the required information is entered on the Request Information tab.



# **Custom Form**

Custom Form displays custom fields created in Setup – Customization – Add User Fields.

🖶 Add 😂 Delete		Sort Fields
Name	Field Desc	Data Type
✓ Form::Assets		
✓ Panel::Assets		
Asset is remote	Employee works from home office	yes/ho(pick list)
V Form::Custom		
V Panel::Custom		
Anniversary Date	Anniversary date	Date
Available to travel	Available to travel	yes/ho(pick list)
Number	The number	Number(edit Field)
Early shift	who is coming in early	yes/ho(pick list)
another field	another	yes/no(pick list)
Additional Info		yes/ho(pick list)
<ul> <li>Form::Personal (Showing 3 of 4 items. Group continues on</li> </ul>	the next page.)	
Panel::EmergencyContacts		
Medical Condition		Text(edit field)
<ul> <li>Panel::Personal (Showing 2 of 3 items. Group continues)</li> </ul>	s on the next page.)	
Uniform Shirt Size	Uniform Shirt Size	Text(pick list)
Chair	Chair	Text(pick list)
H + 1 2 + H Page size: 10 -		11 items in 2 pag

## **Employees-Talent Management**

The Talent Management screens allow you to record significant information in regard to an employee's education, training and certifications, as well as view the status of company trainings in which the employee has enrolled and has completed.

Employees Payroll	Communications	Administration Re	porting Utilities Set	tup
PER SONAL Emergency Contacts Dependents Taxes Direct Deposit Photo Notes BENEFITS	EMPLOYMENT Pay Worker's Comp Discipline Points FMLA/LEAVE CUSTOM FORM	TALENT MANAGEMENT Certifications & Licenses Training Employee View	EMPLOYEE FOLDER EMPLOYEE SNAPSHOT ASSETS	Recently Viewed Employees Brown, Abigail
EMPLOYEE PAYROLL				

## Talent Management

Talent Management holds employee schooling information. You can track schooling, degrees, and field of study for each school entered.

Talent Management	Certifications & Licenses Training Employee View			View Change History
🖨 Add 😂 Delet	e			
Level	School Name	StartDate	Location Major	GPA
College	University of VT	01/19/1980	Burlington Business Management	3.87
	Page size: 5 🔻			1 items in 1 pages

revious Employee	Employee: Abigail Brown-23 🔻 🎸	3
Talent Management	Certifications & Licenses Training Employee View	
School		
School Name:	University of Hard Knocks	
Location:	Anytown, USA	
Degree		
Level:*	College	
Start Date:		
Graduated:	Yes	
Graduation Date:	12/1/2011	
GPA:	3.0	
Honorary Recognition	n: Yes 🔻	
Verification Date:		
Field of Study		
Major:	Accounting	
Second Major:		
Minor:		

## **Certifications & Licenses**

Employee certifications and licenses can be stored in this section. Documentation about each certification can be attached to a list item. Employee certifications and licenses can be stored in this section.

Talent Management Cer	tifications & Licenses Training Emple	oyee View				<u>View Ch</u>	ange His
💠 Add 😂 Delete							
TYPE TYPE	LICENSE NUMBER	ISSUING STATE	ISSUE DATE	RENEWAL DATE	EXPIRATION DATE	DOCUMENT	
Professional		Vermont	10/01/2014	09/01/2015	10/01/2015	View	
	Page size: 5 📼					1 items in 1	1 pages
					Boa	rd Certified Date:	Ē
					Mas	ter Teacher Date:	
ownload the Sample template	2						
Choose File No file chose	n Import						

## Training Employee View

This tab provides a list of classes the employee is eligible to enroll into. This screen also shows a historical training history for each employee. Training history can be added to this tab by clicking the **Add** button and entering the class's pertinent information.

Talent I	Management Certifications & Licenses	Training Employee View	\						View Change His
¢ •	dd 🙀 Delete								
	Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status Com	pletion Status
	T				T	T			
	Our Company Culture 101	01/31/2016	02/01/2016 12:00:00 AM	02/01/2016 12:00:00 AM	Inn- Gold Room	2	View	Enrolled	Edit
	Sexual Harrassment Prevention	01/31/2016	02/02/2016 12:00:00 AM	02/02/2016 12:00:00 AM	Blue Room	0	View	Enrolled	Edit
	Sexual Harrassment Prevention	01/31/2016	02/08/2016 12:00:00 AM	02/08/2016 12:00:00 AM	Blue Room	0	View	Not Enrolled	Enroll
	Customer Service Training	01/31/2016	02/02/2016 12:00:00 AM	02/02/2016 12:00:00 AM	Green Room	2	View	Not Enrolled	Enroll
	Customer Service Training	01/31/2016	02/08/2016 12:00:00 AM	02/08/2016 12:00:00 AM	Green Room	2	View	Not Enrolled	Enroll
•	1 2 🕨 🙌 Page size: 5 💌								6 items in 2 pages

**Note**: Administrators can enroll employees into classes by clicking the Enroll button.

# **Employee Folder**

PERSONAL	EMPLOYMENT	TALENT MANAGEMENT	EMPLOYEE FOLDER	Recently Viewed Employees
Emergency Contacts	Pay	Certifications & Licenses	EMPLOYEE SNAPSHOT	Brown, Abigail
Dependents	Worker's Comp	Training Employee View	ASSETS	Brown, Abrgun
Taxes	Discipline			
Direct Deposit	Points			
Photo	FMLA/LEAVE			
Notes	CUSTOM FORM			
BENEFITS	CUSTOM FORM			
DEMENTO				
EMPLOYEE PAYROLL				

The Employee folder is a repository for the HR administrator to be able to file documents and messages regarding a specific employee. When uploading documents, the user may choose to share the item with the Employee through the Employee Portal. This folder allows users to upload many different document types, listed below:

- .PDF (PDF)
- .doc, .docx (Word)
- .xls, .xlsx (Excel)
- .csv (Comma Delimited)

This area displays all document attachments specific to each employee. Consent forms from the onboarding process are displayed here as well.

To upload files to the employee folder:

- 1. Go to **Employees Employee Folder**.
- 2. Click Add.
- 3. Enter a Document Name.
- 4. Select a **Category** from the dropdown menu.

**Note:** Employment and Personal categories are listed by default. Additional categories can be entered in Setup – Default Table Setup – 19 Documents – Document Category menu.

- 5. Click on **Choose File**, and then select the file to upload.
- 6. Select the **Share Document with Employee** button if the employee should have access to this document in the Employee Portal.



		View Change History
Documents		* indicates mandatory fields!
Document Name: * Non Disclosure Agr	eement	
Select Category: Employment	•	
Choose File (.pdf.doc.docx.xls.xlsx.csv)		
Current File: Delete		
Share Document with Employee		
Save Cancel	Storage Used 0 MB of 500 MB Storage.	

The Employee Folder is also accessible from the **Quick Links** menu on the right side of the **Home** screen.

		Quick Links
Previous Employee Employee: Abigail Brow	n-23 🔻 🅢 Show Concealed: 🗌 <u>View All</u>	Next Employee Adam Rees-31 Employee Folder
Employment Pay Worker's Comp Discipline Points FMLA/LEAVE		View Change History Assets
		* indicates mandatory fields! Workflows
Employment Profile	Employment Dates	None
Change Reason:Select	Hire Date: 9/1/2014	
Status:" Active -	Original Hire Date:	
Position Status:* V/A	Seniority Date:	Initiated Workflows
Type: W-2	Term Expiration Date:	

Clicking the **Employee Folder** link displays the Employee Folder; example shown below.

Docum	nent Name	Consent By	Consent Date	Category	Attachment	Shared
		T		T	T	
Benefit	Summary	Abigail Brown	4/25/2016	Benefits	Benefit.pdf	Shared
Status	Update	Abigail Brown	12/17/2015	Employment	<u>23.pdf</u>	Shared
Depend	lents Import.csv	Abigail Brown	12/30/2015	CertificationAndLicense	Dependents Import.csv	Shared
)		Abigail Brown	1/6/2016	CertificationAndLicense		Shared
Messag	ge <u>23</u>	Abigail Brown	12/23/2015	Message Template	23.pdf	Unshared
	🕨 🕅 Page size: 5 🔻					7 items in 2 page

# Employee Snapshot

This screen provides a convenient snapshot of key employee data for an individual. Links to other data are included on the screen.

Employees Payroll	Communications	Administration Re	porting Utilities Set	up
PER SONAL Emergency Contacts Dependents Taxes Direct Deposit Photo	EMPLOYMENT Pay Worker's Comp Discipline Points FMLA/LEAVE	TALENT MANAGEMENT Certifications & Licenses Training Employee View	EMPLOYEE FOLDER EMPLOYEE SNAPSHOT ASSETS	Recently Viewed Employees Brown, Abigail
Notes BENEFITS EMPLOYEE PAYROLL	CUSTOM FORM			

The Employee Snapshot provides an at a glance view of the employee information:

Pending Alerts(6)	WorkFlows					
Personal 📮		Employment 📴				
First Name:	Anne	Job Title:	Reception			
Middle Name:	Hathaway	EEO Class:	Administrative Support Workers			
Last Name:	Blake	Position:				
Suffix:		Emergency Contacts	<b>D</b>			
Alias:						
Salutation:	Miss.	Name:	Michael Hathaway			
Tour		Home:	8026558347			
Tax 🗗		Work:	ext			
Marital Status:	Married	Cell:	8026558347	Anne Blake		
Exemptions:	1	Personal Email:	training@evolutionhcm.com			
Additional Withholding	18:	Business E-Mail :	training@evolutionhcm.com			
Federal Block:	Include - Federal Tax/Income Reporting	Relationship:	Parent			
Current Benefit Ele	Current Benefit Elections					
		No Data Availa	ble			

Use the Orange tabs next to each heading to be taken to a screen that will allow updates to this area.

Note: The Emergency Contact that is displayed must be marked as the Primary Contact.

#### Evolution<sup>®</sup> Advanced HR

# Assets

Assets are considered any property of the company that employees are responsible for in connection to their job. This may include laptops, cell phones, company cars, etc. Advanced HR contains a list of Assets by default:

- Cell Phone
- Company Vehicle
- Computer
- Fax Machine
- Laptop
- Printer

To create additional asset values for use by the company in the default setup tables:

- 1. Go to Setup Default Table Setup Personal Profile Assets.
- 2. Click on Add.
- 3. Add a Name and a Description.
- 4. Click on Save.

To assign an asset to an employee:

- 1. Go to **Employees Assets**.
- 2. Find the employee and click on **Add**.
- 3. Select the asset and enter a Date Purchased.
- 4. All other fields are "optional" update these as needed based on company policy.
- 5. Click on **Save** when complete.

			View Change History
Assign a new Ass	et		
			* indicates mandatory fields!
Assets:*	Cell Phone	Description:	Cell Phone
Manufacturer:	Samsung	Asset Cost:	599
Model:	Galaxy S7 Active	Date Purchased:*	7/11/2016
Serial Number:	985654784256	Account Number:	1234596789
Out On:	7/11/2016 Due Back:	Retu	irned:
Comment:	Upgrade in July 2018		
Save Cance	4		

# Common Tasks

The following section walks through some common tasks related to Employees and Employee Maintenance:

- Adding a new hire manually
- Self Service Onboarding
- Terminating an Employee

## **New Hire Workflow**

There are two methods to onboard a new employee in Advanced HR:

- **Manually**: Administrators of the system (or those with the authority to add hires based on their security role) can add a new hire. This option allows HR and Payroll teams to input the data directly into the system.
- Self Service Onboarding: You can also initiate the new hire action as an Administrator and then allow the new hire to finish their new hire paperwork. This form of self-service onboarding allows HR and Payroll teams to input employment data while empowering new hires with the ability to enter a portion of their own information. You can also provide documents to new hires, and require them to electronically sign consent forms like handbooks and policies.

Please note that additional setup of a new employee is required within the Employees – Employee Payroll screen. This includes adding any State and local taxes that are applicable to the new hire.

## Adding a new hire manually

In this section, we will discuss adding a new hire using the Add New Hire option from the Administration tab.

1. Go to Administration and click on Add New Hire.



2. Fill in the required information.

### Evolution<sup>®</sup> Advanced HR

Add New Hire			
			* indicates mandatory fields!
Action :	Hire 🔻	First Name : *	Stella
Reason for Add :	Existing Position	Middle Name :	
Date of Hire/Rehire :	7/1/2016	Last Name : *	Maguire
Original Hire Date :		Personal Email : *	smaguire@gmail.net
Start Date : *	7/1/2016	Emp No : *	85
Job Title: *	Vice President - Marketing	Username : *	smaguire@gmail.net
Candidate:	Select Candidate		
	1	Save Cancel	

Note: Field Names in the application followed by a red asterisk (\*) indicate mandatory fields in Advanced HR.

#### Add New Hire

Field / Button	Description
Action	Determine if this is a new hire or rehire. The Action drop down menu values can be edited in Setup – Default Tables Setup – New Hire – Action.
Reason for Add	Enter the reason for adding the new hire. The Reason for Add drop down menu values can be edited in Setup – Default Tables Setup – New Hire – Reason for Add.
Date of Hire/Rehire	Enter the hire date.
Original Hire Date	Enter the original hire date. If it is the same as date of hire, use date of hire. If the original hire date is different (due to a rehire), enter the original hire date here. <b>Note:</b> This field is only enabled when <b>Rehire</b> is selected for <b>Action</b> .
Start Date	Enter the starting date of employment, which is typically the date of hire.
Job Title	Enter the Job Title you are hiring the new hire into. Job Titles are created in Administration – Job Profiles.
Candidate	If you are using the Recruiting module, a dynamic list of candidates that have applied for the specific Position will appear in the drop-down menu. If the new hire is one of the candidates in the list, select the candidate. This will decrease data entry needed, as candidate information will copy from Recruiting.
Name	Enter First, Middle, and Last Name.
User Name	Enter an Evolution Advanced HR username for the new hire.
Emp No	The system will create a unique employee number that will correlate with Payroll.
Home Email	Enter an email address. Advanced HR will use this address to send the new hire an email inviting them to log into the system. Note: There is a separate field in Advanced HR for Work Email.

Field / Button	Description
Offer Letter	If you would like to attach an offer letter to the invite email, use the dropdown menu to select the letter template. The system will send the new hire an email (using the home email above) with the Offer Letter and details on how to log into Advanced HR.

- 3. Click **Save**. The system directs you to the next step of the new hire process.
- 4. The **New Employee Employment Detail** screen displays. Fill in all required information and click **Next** to move to the **Personal** tab.

Employment Persor	nal Consent Taxes Dire	ct Deposit Form 19	Review & Submit	Summary		
Username : conversions@payda	ata.com		Bob Bruin	Emp No : 64		* indicates mandatory fields!
Employment Profile				Pay Profile		
Emp No:*	64			Change Reason:*	New Hire 🔻	
Status:*	Active			Pay Type:*	Salary	
Job Title:*	N/A 💌			Pay Frequency:*	Bi-Weekly 💌	
EEO Class:	Select			Compensation:	\$2,750.00	
FLSA Status:	No			Annualized Pay:	\$71,500.00	
Benefit Class:	Select •			Standard Hours:		
Organization				Hourly Equivalent:	0.00	
Work Phone:				Wage Limit:	\$0.00	
Work Email:*	conversions@paydata.com			Wage Limit Frequency:*	Annual	
Badge Number:						
Admin Number:						
HR Profile						
Reports To:	•					
Select						
Veteran Profile			]			
Veteran:	⊖Yes ®No					
VETS-100-						
Disabled Veteran	Armed Forces Service Medal Veteran					
Other Protected Veteran	Vietnam Era Veteran					
						Next
						Next

### **Employment Profile**

Field / Button	Description
Emp. No	Defaults to the next available number. This can be overridden.
Status	Defaults to <b>Active</b> . The Status dropdown menu values can be edited in Setup – Default Tables Setup – Employment Profile – Employment Status.
Job Title	[Position Enabled Company] Defaults to Job Title selected in the previous step.
EEO Class	Select the EEO Class (EEO class is set up in Setup – Default Table Setup – EEO Class).
FLSA Status	Select <b>Yes</b> , <b>No</b> or <b>N/A</b> . Defaults to <b>No</b> for a non-position management enabled company; for a Position Management Enabled company, the FLSA Status field defaults to whatever value is defined for that position. The FLSA Status dropdown

### Evolution<sup>®</sup> Advanced HR

Field / Button	Description
	menu can be edited in Setup – Default Tables Setup – Employment Profile – FLSA Status.
Benefit Class	Select the benefit class to which this employee belongs.

### Organization

Field / Button	Description
Work Phone	The employee's work phone number.
Work Email	The employee's work email.
Badge Number	The employee's badge number for timekeeping or other systems, if that number differs from Employee Number.

### **HR Profile**

Field / Button	Description
Reports To	Designates the employee's direct manager/supervisor. The manager/supervisor must be assigned the corresponding roles and permissions in Setup –Security – Assign Roles.
	<b>Note:</b> If you have Position Management enabled, defaults from the new hire's position will be auto-populated and not editable.

### **Veterans Profile**

Field / Button	Description
Veteran	Yes or No option button indicates whether the new hire is a Veteran.
Disabled Veteran	Check box indicates new hire is a Disabled Veteran.
Other Protected Veteran	Check box indicates new hire is Other Protected Veteran.
Armed Forces Service Medal Veteran	Check box indicates new hire is Armed Forces Service Medal Veteran.
Vietnam Era Veteran	Check box indicates new hire is Vietnam Era Veteran.

### **Pay Profile**

Pay Profile – Hourly – When hourly pay type is selected, fill in these fields.

Field / Button	Description			
Change Reason	Reason for making a change to this employee record (typically "New Hire"). The Change Reason drop-down menu can be edited in Setup – Default Tables Setup – Employment Profile – Change Reason.			
Рау Туре	Employee Pay Type. Selecting Hourly or Salary will expose different fields for data entry.			
Pay Frequency	The frequency of the compensation. Entries include Bi-Weekly, Daily, Monthly, Quarterly, Semi-Monthly and Weekly.			
Compensation (Salary driven field)	Enter the compensation for the Pay Frequency selected. If the employee's salaried compensation is \$2,000 dollars every two weeks, enter \$2,000 and select Bi-Weekly as the Pay Frequency.			
Annualized Pay (Salary driven field)	Annualized pay is auto-calculated to represent the Pay Frequency and Compensation for one year.			
Standard Hours	Per Pay Period, the number of hours the employee works per frequency			
Hourly Equivalent (Salary driven field)	Hourly equivalent to the salary given the standard hours defined within the pay frequency.			
Primary Rate (Hourly driven field)	Displays when <b>Hourly</b> is selected. Enter the primary hourly rate for this employee.			
Standard Hours	Per Pay Period, the number of hours the employee works per frequency.			
Pay per Check (Hourly driven field)	Calculated based on Primary Rate X Standard Hours.			
Estimated Annualized Pay (Hourly driven field)	Calculated Based on <b>Pay Per Check</b> X <b>Pay Frequency</b> . Estimated pay annually if standard hours remained consistent.			
Wage Limit	The limit above which Evolution should no longer calculate Workers' Compensation for this employee. This limit applies to Adjusted Wages and is used by Evolution to calculate Workers' Comp ACH Impounds, Billing and Agency Check creation.			
Wage Limit Frequency	<ul> <li>The frequency to be applied to the Workers' Comp Wage Limit, above which Evolution should no longer calculate Workers' Compensation for this employee. Options are: <ul> <li>Every Pay</li> <li>Monthly</li> <li>Quarterly</li> <li>Semi-Annually</li> <li>Annually (default) based on a calendar year unless an override particulate is defined on the Compensation for this canera.</li> </ul> </li> </ul>			
	period begin date is defined on the Company - General - Company Info - WComp & Benefits tab in Evolution Classic.			



5. On the **Personal** tab, Populate fields that were not initially entered during the first step of the new hire process and click on **Next**.

Employment Persona	Consent Taxes	Direct Deposit	Form 19	Review & Submit	Summary			
Username : conversions@paydata	1.com			Bob Bruin		Emp No : 64		* indicates mandatory fields!
Personal						Home Address		
Salutation:	Select	•				Address Line 1:*	123 Test Stret	
First Name:*	Bob					Apartment:		
Middle Name:						Address Line 2:		
Last Name:*	Bruin					City:*	Burlington	
Suffix:	Select	•				Country:*	USA	
Alias:						State:*	Vermont	
Birth Date :*	1/2/1981					Zip:*	05401	
Age :	35 years					Contact Information		
Gender:*	Male	•						
Social Security Number (SSN):*	000-00-0064					Personal Email:*	conversions@paydata.com	
Marital Status:	Married	•				Home Phone:		
Ethnicity:*	White	•				Cell:		
						Provider Type:	Select	
						Yes, I want all SMS alerts		
						Emergency Contact		
						Name:	Bruno Mars	
						Home Phone:	(802)555-1234	
						Relationship:	Friend	
Previous								Next

### Personal

Field / Button	Description
Salutation	Salutation used for employee correspondence. The Salutation dropdown menu can be edited in Setup – Default Tables Setup – Personal Profile – Salutation.
Name	Employee's First, Middle, and Last name.
Suffix	Suffix for the employee, if applicable.
Alias	Employee's nickname or alias.
Birth Date	Employee's birth date. Age will automatically calculate based on Birth Date.
Gender	Employee's gender.
SSN/SIN	Employee's government identification number (Social Security Number for U.S. employees).
Marital Status	Employee's actual marital status (which can differ from Federal, State, or Local tax filing status).
Ethnicity	Employee's Ethnicity for EEO reporting purposes.



#### **Home Address**

Field / Button	Description
Address Line 1	Employee's home street address.
Address Line 2	Employee's home additional address information.
City	Employee's home city.
Country	Country the address is located in. The country drop-down menu is universal for the employee's address, live-in country, and work-in country.
State	State the address is located in. This drop-down menu is dynamically generated based on the country selected for the employee. The State drop-down menu is universal for the employee's address, live-in state, and work-in state.
Zip	Zip code for the home address.

#### **Contact Information**

Field / Button	Description
Personal Email	Employee's home email address.
Home Phone	Employee's home phone number.
Cell	Employee's cell/mobile phone number.
Provider Type	Mobile phone provider.
Yes, I want all SMS alerts	If selected, the employee will receive SMS text messages as well as email alerts generated within Advanced HR.

### **Emergency Contact**

Field / Button	Description
Name	Name of Employee's Emergency Contact.
Home Phone	Home Phone Number of Employee's Emergency Contact.
Relationship	Relationship of the Emergency Contact to the Employee.

- 6. **Consent Forms:** Consent forms are forms you want the employee to review and electronically sign during their onboarding/new hire process. Consent forms are tied to each onboarding profile, and can be tied directly to specific positions, or assigned when creating the new hire. See the *Self Service Onboarding* section of this document for more information. Click **Next**.
- 7. On the **Taxes** tab, enter the employee's Federal Tax Withholding information.





Employment Personal	Consent Taxes	Direct Deposit	Form 19	Review & Submit	Summary			
Username : conversions@paydata.com	1			Bob Bruin		Emp No : 64		* indicates mandatory fields!
Federal Tax						EE Tax Statuses		
Withholding Status:*	Married	•				Federal Tax Status:	Include - Federal Tax/Income Reg	
Exemptions:*	2					OA SDI Exempt:	No	
Tax Type:*	None	•				Medicare Exempt:	No	
FUI Rate Credit:						ER Tax Statuses		
Override Fed Minimum Wage:						FUI Exempt:	No	
	View W-4 Form					OA SDI Exempt:	No	
						Medicare Exempt:	No	
Previous								Next

### **Federal Tax**

Field / Button	Description
Withholding Status	Employee's withholding status for federal tax. The Withholding Status drop-down menu is universal for federal, state, and local taxes.
Exemptions	Number of claimed exemptions for federal tax.
Тах Туре	Federal Tax Type.
Additional Witholdings	Additional dollars or percentage the employee chooses to withhold for federal tax.
FUI Rate Credit	Federal Unemployment Insurance Rate Credit.
Override Fed Minimum Wage	Override Federal Minimum Wage Amount.
View W-4 Form	Allows you to view the completed W-4 form based on information populated in this section.

### **EE Tax Statuses**

Field / Button	Description
Federal Tax Status	Federal Tax Status
OASDI Exempt	OASDI/EE Exempt or not
Medicare Exempt	Medicare Exempt or not

### **ER Tax Statuses**

Field / Button	Description
FUI Exempt	Federal Unemployment Insurance Exempt or not
OASDI Exempt	OASDI/ER Exempt or not
Medicare Exempt	Medicare Exempt or not

- 8. Once all information is entered, click on **View W-4 Form**. This can be electronically signed by the employee at this time. Once information is completed in this section, an electronic W-4 form is available for review and approval once completed, click **Next**.
- 9. On the **Direct Deposit** tab, enter the Direct Deposit Information or Waive the Direct Deposit. When completed click **Next**.

Emplo	yment	Personal	Со	nsent Taxe	Direct Depo	sit	Form 19	Review &	Submit	Summary					
Username :	conversion	s@paydata.con						Bo	ob Bruin		Emp No : 64			* indicates mandatory fie	elds!
Direct De	posit Acco	ounts													
To have you	ır pay chec	k directly depos	ited to	your bank accou	nt please complete t	he info	ormation request	ed below.							
A nine o located left corr	Transit/ABA Number     100       An end oft ranser     100       Content in the ranset     100       Content in the ranset     100       Content in the ranset     100														
Accounts															
Waive Dire	ct Deposit /	uthorization 🗆													
				nk account numbe	rs.										
2.After add	ling a new r	ow existing prio	rity or	der will change.											
🖨 Add	😂 Delet	e													
	Priority *			Account Type *		A	Account Name *		Rou	uting Number *		Account Number *	Amount *	Deduction Code	
	1		٠	Savings		x	masClub		00	0000000		123123123	\$100	-Select	•
	2		٠	Checking		N	ewHireTest		00	0000000		123123123	Remainder	-Select-	•
	Save Cancel														
Previous															Next

10. On the **Form I9** tab, enter the employee's I-9 information. Upload copies of the Identification Documents by clicking **Select** next to the **Attachment** field.

Employment	Personal	Consent	Taxes	Direct Deposit	Form 19	Review &	Submit	Summary					
Jsername : conversio	ons@paydata.com	1				В	ob Bruin	Emp	No:64			•	indicates mandatory fields!
Federal Form I-9													
Section 1.	Employee Inf	ormation											
Citizen or national	of United States												
Section 2.	Employee Inf	ormation and	Verificatio	on.									
To be completed and signed by employer. Examine one document from LIst A DR examine one document from LIst B and one from list C. Record the tile, number and explained deal, if any, of the document(b).													
		List A - Vie	w Acceptable	e Documents	OF	R Li	st B - <u>View</u>	Acceptable Document	5	AND	List C - View Acceptable Documents		
Oocument Title:*		Select		•		Ē	-Select	•			Select		
ssuing Authority :													
Oocument #:													
Expiration Date (if an	ıy):												
CERTIFICATION													
attest, under penalty	y or perjury, that I	have examined	the documen	t(s) presented by the	above-named e	mployee, that	the above	listed					
ocument(s) appear	to be genuine and	to relate to the e	employee nar	med, that the employ	ee begin employ	ment on					8/2	2/2016 🔳 *	
ind that to the best o	f my knowledge th	ie employee is e	ligible to wor	k in the United States	s.								
							1	VIEW AND E-SIGN	-9 FORM				

- 11. Click **Next** when complete.
- 12. On the **Review and Submit** tab, users can review any information entered by clicking on the name of the step. Review the status of each section to confirm completion of the new hire data entry. If a status is incomplete, click the hyperlink of the incomplete step and finish entering the required information.



Employment	Personal (	Consent Taxes	Direct Deposit	Form I9 Review & Subr	mit Summary		
ername : conversio	ns@paydata.com			Bob E	3ruin	Emp No : 64	
eview & Submit							
S.No	Status		Step		Completion Date	Approval Date	Approval By
1	Ø		Employment		8/18/2016	8/18/2016	Sue Buckland
2	ŏ		Personal		8/18/2016	8/18/2016	Sue Buckland
3	ŏ		Consents		8/18/2016	8/18/2016	Sue Buckland
4	Ĭ,		Taxes		8/18/2016	8/18/2016	Sue Buckland
5	ŏ		DirectDeposit		8/18/2016	8/18/2016	Sue Buckland
6	Ä		19eVerify		8/18/2016		

13. Once all sections are complete, click the **Submit** button to move the new hire to employee status.

14. The new hire will receive a notification email inviting them to log into Advanced HR. If an offer letter template was selected at the beginning of the Add New Hire process, the employee will also receive that letter.

Dear Vince Vaughn :								
Welcome to Shelburne Inn & Shoppes-SHEL100 !								
Your account has been created successfully.								
Your account credentials are as follows:								
username: vvaughn password: qzWXoLMr38!								
To complete your new hire forms, log into your new account - <u>click here</u> .								
After you have completed your forms click the submit button at the end of the new hire wizard.								
You will be contacted by human resources once your forms are approved.								
To Reset your password <u>click here</u>								
With regards Shelburne Inn & Shoppes-SHEL100								

15. **Summary**: Once you click the **Submit** button in the **Review and Submit** section, the system will provide details of the successful new hire.

	_	
Username : vvaughn	Emp No	0:63
Summary & Next Steps		
Congratulations! The Information has been successfully submitted Confirmation Date : 12/14/2015		
Exit		

Note: You cannot move to the Summary section until all sections are complete and the "Submit" button is clicked.

Now that the information has been submitted, go to the **Employee – Employee Payroll** menu and find the New Employee.

- 1. On the Labor Defaults tab, select the Organizational level to which this employee belongs as well as any Workers compensation codes, jobs, unions and pay groups. For companies using GL export, you can assign a General Ledger tag to the employee at this time. Click Next when complete.
- 2. On the ACA tab, ensure that all default values are correct. Update any fields needed. Click Next when complete.
- 3. If this employee is an Hourly employee, the hourly rate from earlier should already be entered here. If there are additional rates or organizational levels needed for this rate, update at this time. Click **Next** when complete.
- 4. Update the W-2 or 1099 information as needed on the **Federal** tab. Click **Next** when complete.
- 5. Add the Employee's State, SUI State, SDI State, Home State, State Marital Status, and Tax Exemptions on the **State** tab. Click **Next** when complete.
  - If the state is not in the list, the state will need to be added to the company in Evolution Classic
     Company Taxes States tab.
  - Use this tab to also update the Reciprocation method as well as any State Tax exemption statuses and overrides such as Minimum Wage.
- 6. On the **Locals** tab, add any locals that this employee will need to be taxed in. Click **Next** when complete.
- 7. On the **Child Support** tab, enter any child support cases that will be used to create a Child Support Scheduled E/D. Click **Next** when complete.
- 8. On the **Direct Deposit** tab, enter the Direct Deposit accounts that will be used to create a Direct Deposit Scheduled E/D. Click **Next** when complete.
- 9. On the **Scheduled E/Ds** tab, enter any scheduled E/Ds needed for this employee such as Child Support. Click **Next** when completed.
- 10. On the **Time Off Accrual** tab, add any Time Off Accrual plans that this employee will be eligible to use. Existing balances can be added or adjusted here.
- 11. On the **Notes** tab, add any Payroll notes for this employee.
- 12. Click the Save icon to save this employee.

Once completed, if the employee will be logging into the Employee Portal, you can now go to **Setup – Manage Passwords** and update the employees Username and Password as needed.

## Self-Service Onboarding

Self Service Onboarding will allow the company to have the new employee enter a portion of their own information through a Self Service Portal. You can also provide documents to new hires, and require them to electronically sign consent forms like handbooks and policies. The company new hire documents (Consent Documents) to be read and signed by the new hire during onboarding are initially loaded into AHR via the Administration - Onboarding Profile. During Self-Service Onboarding in AHR, the new hire electronically signs these documents. Once the employee has entered the information, the hiring manager or administrator can approve the information, saving time for the company.

Note: Self Service Onboarding requires that at least one Onboarding Profile be created for the company.

#### The HR Administrator performs the following tasks:

To add a new employee using Self Service Onboarding – the Administrator performs the following:

Send to New Hire			
			* indicates mandatory fields!
Action :	Select Action 💌	First Name : *	
Reason for Add :	Select Reason 💌	Middle Name :	
Date of Hire/Rehire :		Last Name : *	
Original Hire Date :		Personal Email : *	
Start Date : *		Emp No : *	86
Job Title: *	Select JobTitle 💌	Username : *	
Onboarding Profile: *	Select OnBoardingProfile	Offer Letter :	Select
Candidate:	Select Candidate		
	Send New	Hire Notice Cancel	

1. Go to Administration – Self Service Onboarding (under the New Hires category).

2. On the **Send to New Hire** screen, enter the basic new hire information – required fields are those fields marked with a red asterisk (\*).

Field	Description
Action	Select Hire or Rehire. The Action dropdown menu values can be edited in Setup – Default Tables Setup – New Hire – Action.
Reason for Add	Select Existing Position to fill an existing open position or New Position to fill a new position in the company. The Reason for Add dropdown menu values can be edited in Setup – Default Tables Setup – New Hire – Reason for Add.
Date of Hire/Rehire	Select the Hire or Rehire date.
Original Hire Date	Enter the original hire date. If it is the same as date of hire, use date of hire. If the original hire date is different (due to a rehire), enter the original hire date here. Note: This field is only enabled when Rehire is chosen for Action.
Start Date	Enter the starting date of employment, which is typically the date of hire.



Field	Description
Job Title	Enter the job title you are hiring the new hire into. This will help to fill in Job duties and other information in later steps.
Onboarding Profile	Selecting the Onboarding Profile to be used for this new hire and the system will attach the appropriate new hire packet to this new hire Candidate. <b>Note:</b> You set up the Onboarding Profile new hire packets using the Administration – Onboarding Profiles and Consent Documents menu items. These must be already set up to be able to select them here in the Onboarding Profile dropdown.
Candidate	If you are using the Recruiting module, a dynamic list of candidates that have applied for the specific Position will appear in the drop-down menu. If the new hire is one of the candidates in the list, select the candidate. This will decrease data entry needed, as candidate information will copy from Recruiting.
First/Middle/Last Name	Enter the employee names.
Personal Email	Enter an email address. Advanced HR will use this address to send the new hire an email inviting them to log into the system and fill out the rest of their onboarding paperwork. <b>Note:</b> There is a separate field in Advanced HR for Work Email.
Emp. No	Defaults to the next available number. This can be overridden.
Username	This will default to the Personal Email. This can be overridden.
Offer Letter	If you would like to attach an offer letter to the invite email, use the dropdown menu to select the letter template. The system will send the new hire an email (using the home Personal email above) with the Offer Letter and details on how to log into Advanced HR

3. Once you have completed entering all of the new hire's personal information, click on the **Send New Hire Notice**.

#### Send New Hire Notice

#### The new hire then completes these tasks:

The system will generate an email addressed to the new hire asking them to complete their new hire paperwork, similar to the sample email shown below. The email provides the candidate with their username and password temporary credentials to use to access the new hire forms in the Portal.

Dear Meg Ryan :
Welcome to Shelburne Inn & Shoppes-SHEL100 !
Your account has been created successfully.
Your account credentials are as follows:
username: megryan password: FrYeKyZr65!
To complete your new hire forms, log into your new account - click here.
After you have completed your forms click the submit button at the end of the new hire wizard.
You will be contacted by human resources once your forms are approved.
To Reset your password <u>click here</u>
With regards Shelburne Inn & Shoppes-SHEL100

1. The candidate receives the email and clicks on the "**click here**" link to complete their new hire forms on the Self Service Onboarding Portal. They receive the Welcome message, shown below.

Welcome	Personal	Form I-9	Consent Forms	Tax Election	Direct Deposit	Review & Submit	Summary
	Congratulation	s on your new positi	on, and welcome to <u>Shelburn</u>	e Inn & Shoppes New Hi	re Setup!		
		esentative has set yo bout ten minutes.	ou up as a new hire in our sys	stem. To complete the pro	ocess, we need some inform	ation from you. This	
	You can stop a	t any point and com	e back later to finish.				
			Come back later	Let's get started	l		

Note that the Welcome message can be customized.

Result: The system takes the new hire to a series of tabbed screens (Personal throught Summary) to complete all of their new hire information. For each section, the new hire can click the Save and Continue button to move to the next section of the onboarding process, or can click the Come Back Later button to leave the onboarding process:



Welcome	Personal	Form I-9	Consent Forms	Tax Elec	tion	Direct Deposit	Review & Submit	Summary	
First Name:*	Meg			Address Line 2:					
Middle Name:				City:*					
Last Name:*	Ryan			Country:*	USA		•		
Suffix:	Select		•	State:*	Sele	ct	•		
Alias:				Zip:*					
Birth Date:*		Age:		Contact Informa	ation				
Gender:*	Select		•						
Social Security Number (SSN):*				Personal Email:*	nchev	rier@evolutionhcm.com			
Marital Status:*	Select		•	Home Phone:					
Ethnicity:*	Select		•	Cell:					
	D			Provider Type:	Sele	ct	•		
				Yes, I want al	I SMS ale	rts			
				Emergency Cor	ntact				
				Name:*					
				Home Phone:*					
				Relationship:*	Sele	ct	•		
			Come back lat	ter Save & Co	ontinue				

#### Personal

Field	Description
Salutation	Salutation used for employee correspondence. The Salutation dropdown menu can be edited in Setup – Default Tables Setup – Personal Profile –Salutation.
Name	Employees First, Middle, and Last name.
Suffix	Suffix for the employee, if applicable.
Alias	Employee's nickname or alias.
Birth Date	Employee's birth date. Age will automatically calculate based on Birth Date.
Gender	Employee's gender.
SSN/SIN	Employee's government identification number (Social Security Number for U.S. employees).
Marital Status	Employee's actual marital status (which can differ from Federal, State, or Local tax filing status).
Ethnicity	Employee's Ethnicity for EEO reporting purposes.

### **Home Address**

Field	Description
Address Line 1	Employee's home street address.
Address Line 2	Employee's home additional address information.
City	Employee's home city.
Country	Country the address is located in. The country drop-down menu is universal for the employee's address, live-in country, and work-in country.
State	State the address is located in. This drop-down menu is dynamically generated based on the country selected for the employee. The State drop-down menu is universal for the employee's address, live-in state, and work-in state.
Zip	Zip code for the home address.

### **Contact Information**

Field	Description
Personal Email	Employee's home email address.
Home Phone	Employee's home phone number.
Cell	Employee's cell/mobile phone number.
Provider Type	Mobile phone provider.
Yes, I want all SMS alerts	If selected, the employee will receive SMS text messages as well as email alerts generated within Advanced HR.

### **Emergency Contact**

Field	Description
Name	Name of Employee's Emergency Contact.
Home Phone	Home Phone Number of Employee's Emergency Contact.
Relationship	Relationship of the Emergency Contact to the Employee.

#### Form I-9

Employees can view and sign their I-9 using the hyperlink provided. In order to stay compliant with Federal I-9 Form regulations, users have the ability to complete their I-9 Form details on the I-9 screen. This feature of the I-9 screen takes all of the related Employee - Personal tab I-9 screen information and places it into pre-populated text boxes on the I-9 screen so that the employee can review the information, make corrections if needed, and approve that it is correct. If the user changes the information on the I-9 screen, this will also change the information on the Personal tab.

The following three screenshots show a sample of the I-9 screen – scrolling downward to show the entire screen:

Velcome	Personal	Form I-9	Consent Forms	Tax Election	Direct Deposit	Review & Submit	Summary
Form I-9 Employ	ment Flighility - T	his information is re-	guired by the U.S Governm	ant			* indicates mandatory field
I attest under pe		hat I am (Select one					
OA lawful perm	anent resident						
⊖An Alien autho	orized to work until						
For aliens autho	rized to work, prov	ide your Alion Regis	tration Number/USCIS Num	ber OR Form 1-94 Admissio	on Number:		
I. Alien Registra	tion Number/USCI	5 Number:					
	OR						
2. Form I-94 Adr	mission Number:						
If you obtain	ed your admission	number from CBP in	connection with your arriv	al in the United			
Foreign	Passport Number:						
Country	y of Issuance: s	efect	•				
5ome aliens may	write "N/A" on the	e Foreign Passport N	lumber and Country of Issu	ance fields. ( <i>See instructio</i>	ns)		
Please verify you	ir personal details l	below and make adj	ustments if necessary.				
Last Name (Far	nily Name)	First Name (G	iven Name) 🔹 🖡	tiddle Initial	Other Names Use	d (if any)	
Inm 22		fnm 22	1	N/A.	N/A		

OR					
Form I-94 Admission Number:					
If you obtained your admission	number from CBP in connection with yo	ur arrival in the United			
Foreign Passport Number	:				
Country of Issuance:	Select +				
ne aliens may write "N/A" on th	e Foreign Passport Number and Country	of Issuance fields. (See instructions)			
me aliens may write "N/A" on th	e Foreign Passport Number and Country	of Issuance fields. (See instructions)			
	e Foreign Passport Number and Country below and make adjustments if necessar				
			Other Names Used (if any)		
ase verify your personal details est Name (Family Name)	below and make adjustments if necessar	ıy,	Other Names Used (if any)		
ase verify your personal details ist Name (Family Name) im 22	below and make adjustments if necessar First Name (Given Name) firm 22	ry. Niddle Initial N/A	N/A		
ase verify your personal details est Name (Family Name) im 22	below and make adjustments if necessar First Name (Given Name) finm 22 Apt #	ry. Niddle Initial	N/A State	Zip Code	
ase verify your personal details ist Name (Family Name) im 22	below and make adjustments if necessar First Name (Given Name) firm 22	ry. Niddle Initial N/A	N/A	Zip Code	
ase verify your personal details set Name (Family Name) m 22 Idress (St. Name and #) I	below and make adjustments if necessar First Name (Given Name) fnm 22 Apt # N/A	y. Niddle Initial N/A City or Town	N/A Statu Select		
ase verify your personal details ust Name (Family Name) <b>m 22</b> Iddress (St. Name and #) I ate of Birth (mm/dd/yyyy)	below and make adjustments if necessar First Name (Given Name) finm 22 Apt #	y. Niddle Initial NIA City or Town Email Address	N/A State		
ase verify your personal details set Name (Family Name) m 22 Idress (St. Name and #) I	below and make adjustments if necessar First Name (Given Name) fnm 22 Apt # N/A	y. Niddle Initial N/A City or Town	N/A Statu Select		
ase verify your personal details set Name (Family Name) m 22 Idress (St. Name and #) I ate of Birth (mm/dd/yyyy)	below and make adjustments if necessar First Name (Given Name) finm 22 Apt # N/A U. S. Social Security Number	y. Niddle Initial NIA City or Town Email Address	N/A Statu Select		



Please verify your personal details b	elow and make adjustments if necessar	y. 🔓		
Last Name (Family Name)	First Name (Given Name)	Middle Initial	Other Names Used (if any)	
Inm 22	fnm 22	m	N/A	
Address (St. Name and #)	Apt #	City or Town	State	Zip Code
a1	apt	cty	California 🔻	45343
Date of Birth (mm/dd/yyyy)	U. S. Social Security Number	Email Address	Telephone Number	
2/2/1990	232-32-3232	foram-gandhi@priyanet.com		
I approve that all of the details I am aware the Federal Law pro Do not display my Social Securit Mew or Sign 19	wides for imprisonment and/or fines for	false statements or use of false documen	ts in connection with the completion of th	is form.*
	Come ba	ack later Save & Continue		

The user must click the "I approve that all of the details above are correct" check box. If the user has not, they receive the following message box.

Advanced HR	
Please verify that al details are correct a checkbox.	
	ок

The user must click the "I am aware of the Federal law ... " check box. If not, they receive the following message box.



After clicking both check boxes, the user clicks the **View or Sign I9** link and the system changes the bottom of the screen and presents the user with the Sign or Reject options for the I-9 as shown below.

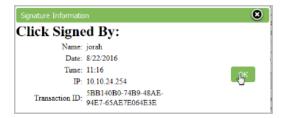
Clicking the **View or Sign I9** hyperlink provides the employee with access to the I-9 form, where they can sign or reject the form using the buttons provided. The system will create a transaction ID for auditing purposes:



The user clicks the **Sign** button indicating they approve all of their I-9 Form details. The system then presents the following Attestation message box, confirming they have read the attestation information on the screen.

Attestation	
	ge that I have read the attestation that we my signature in the form I-9.
oppears and	

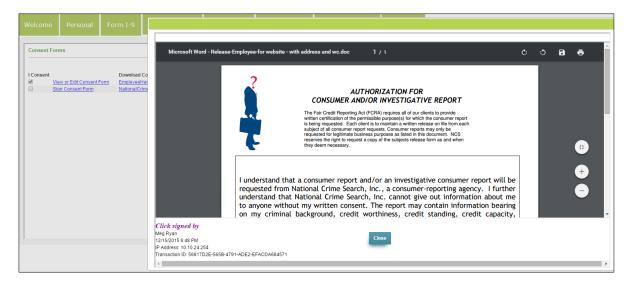
The user clicks the **Confirm** button and receives the following Signature Information message box:



#### **Consent Forms**

Takes the new hire through the new hire documents that have been previously loaded into the system as part of the new hire packet for the position. New hires can read consent forms, download, sign, and date them. Consent forms are tied directly to specific positions or assigned when creating the new hire.

- 1. To download a consent form to review or print, click the document hyperlink in the **Download Consent Forms** column. The application will launch the applicable product for the form.
- 2. To sign a consent form, click the **Sign Consent Form** hyperlink to the left of the form name. The system will provide the user with a "**Sign**" button.
- 3. After each form is signed, the "I Consent" check box will be checked, signifying the form is signed. All required consent forms must be signed.



4. There is an option to allow the employee to download a form, sign it manually, and then upload the form. For more information on allowing consent form uploads, see the *Onboarding Profiles* section of this guide.

The new hire views and signs off on all the applicable consent documents. Once a new hire completes and signs all consent forms, they are automatically added to the Employee Folder.



C⊕m	Pass	
	Employee Acknowledgement Form	
	andbook describes important information about the Company, and I understand that I the Human Resource Department regarding any questions not answered in the	
	nation, policies and benefits described here are necessarily subject to change, I at revision to the handbook may occur. All such changes will be communicated through	

#### **Tax Election**

The employee can fill out pertinent information regarding federal, state, and local taxes. The employee can also view and sign their W-4 after filling out their tax election information.

Welcome	Personal	Form I-9	Consent Forms	Tax Election	Direct Deposit	Review & Submit	Summary
Federal Taxe	s						* indicates mandatory fields.
Withholding St	tatus :*	Select	T				
Exemptions :*							
Additional With	nholdings :						
Federal Tax St	tatus :	Include - F	ederal Tax/Income Re; 💌				
Important Inf		thhold Federal Incon	ne Tax based on W-4 Form o	ompleted by the employe	e		
If an employee	does not complete	this form all the time	of hire, taxes will be withhele t be made without a new W-4	d based on a status of Si	ngle, with no allowances.		
	s must be maintaine	ed at the employer's		Tom completed by the	employee.		
view and old			Come back later	Save & Continue	1		

**Important:** The State Taxes feature of the self-service onboarding is not yet active. Until it is working, the HR Administrator will have to input the new hire's state tax information.

**Federal Tax** 

Field	Description
Withholding Status	Employee's withholding status for federal tax. The Withholding Status drop- down menu is universal for federal, state, and local taxes.
Exemptions	Number of claimed exemptions for federal tax.
Additional Withholdings	Additional dollars or percentage the employee chooses to withhold for federal tax.
Federal Tax Status	Federal Tax Status
View W-4 Form	Allows you to view the completed W-4 form based on information populated in this section.

Once the information is filled out, the employee can click on the **View and Sign W-4** link on the screen to review and electronically sign off on their W-4 information.



Federal Taxe			Prot				
Withholding St		Single	1 Your arst name and middle inidal Meg	Last Name Ryan		2 Your social security	number 340-87-5542
Exemptions :*		2	Home address (number and street or rural route) One Hollywood Ave		3 Single Married Ma Note. If married, but legally separated	mied, but withhold at h , or spouse is a nonresid	igher Single rate. ent allen, check the "Single" box.
Additional With		\$0.00	City or town , state Province:, and ZIP/Postal code: Beverly Hills, California, 90210		4 If your last name differs from the check here. You must call 1-800-7		
If an employee Subsequent ch	red employers to wi a does not complete hanges to employe s must be maintain	thiold Federal Income T this form all the time of withholdings cannot be ed at the employer's wor	Insi year i expecta retund or all tederal income tax withheid be if you meet both conditions, write "Exempt" here m	I acknowledge that I hav appears above my signat Confirm ne certificate and, to the best	Cancel	s true, correct, and	5 2 6 50 00 7 7 50 00 7 7 7 7
			8 Employer's name and address (Employer: Complete lines 8 and 10	) only if sending to the IRS.)	9 Office code (o	ptional) 10 Em	ployer identification number EIN)
			Sign! Reject!				

#### **Direct Deposit**

The employee can enter full and partial amounts for direct deposit. This must be processed internally by a payroll administrator and approved prior to being automatically deducted.

Step 1: Determine If you would like to have your paycheck deposited into one account (Full Net), multiple accounts (Partial) or Waive Direct Deposit to receive a manual paycheck. Waive Direct Deposit Authorization	Pay History Tax Documents Dir	rect Deposit			
Image: Waite Direct Deposit Authorization         Image: Status         Stat	Direct Deposit				
	Step 1: Determine if you would like to have your	paycheck deposited into one account (Full Net), m	ultiple accounts (Partial) or Waive Direc	t Deposit to receive a manual paycheck.	
STATUS         STATURE         DO DATE Available           NO DATE Available         0 Rems in 1 page           If a properties of a page state is an off off off off off off off off off of	Waive Direct Deposit Authorization				
No Data Available         No Data Available         O Rems in 1 pages         Step 2: Please enter your Direct Deposit Account information:         1.1INCLUDE ALL LEADING ZEROS WHEN ENTERING BANK ACCOUNT NUMBERS,         2.AFER ADDING A NEW ROW ExitsTing PRIORITY ORDER WILL CHANGE.         * INDICATES MANCATORY FREDS.	🜵 Request a change 😫 Delete				
Image: Step 2: Please enter your Direct Deposit Account Information:         1.INCLUDE ALL LEADING ZEROS WHEN ENTERING BANK ACCOUNT NUMBERS.         2.AFTER ADDING A NEW ROW EXISTING PRIORITY ORDER WILL CHANGE.         *INDICATES MANDATORY FREDS.         Priority*       Account Yame*       Transit/Routing Number*       Account *         1       Checking       Pacent       100       add         Step 3: Required upload of voided check:       Step 3: Required upload of voided check:       Step 3: Required upload of voided check:	STATUS START DA	ITE	ND DATE	DEPOSIT TYPE	
Step 2: Please enter your Direct Deposit Account information: LINCLUDE ALL LEADING ZEROS WHEN ENTERING BANK ACCOUNT NUMBERS. 2.AFTER ADDING A NEW ROW EXISTING PRIORITY ORDER WILL CHANGE. Priority * Account Type * Account Name * Transit/Routing Number * Account Number * Type * Amount * 1 • Checking • Percent • 100 add Step 3: Required upload of voided check:		No	Data Available		
	4 4 1 ► ►  Page size: 5 ▼				0 items in 1 pages
2.AFTER ADDING A NEW ROW EXISTING PRIORITY ORDER WILL CHANGE.  Priority * Account Type * Account Name * Transit/Routing Number * Account Number * Type * Amount *  1 • Checking • 200 add Step 3: Required upload of voided check:	Step 2: Please enter your Direct Deposit Account	information:			
* INDICATES MANDATORY FIELDS.  Priority* Account Type* Account Name* Transit/Routing Number* Account Number* Type* Amount*  1  Checking  Checking	1.INCLUDE ALL LEADING ZEROS WHEN ENTERING BANK	K ACCOUNT NUMBERS.			
Priority*         Account Type*         Account Name*         Transit/Routing Number*         Type*         Annount*           1          Checking         •          Percent •         100         add           Step 3: Required upload of voided check:             add	2.AFTER ADDING A NEW ROW EXISTING PRIORITY ORD	DER WILL CHANGE.			
1     Checking     •     Percent     100     add       Step 3: Required upload of voided check:				* INDICATES N	ANDATORY FIELDS.
Step 3: Required upload of wolded check:	Priority * Account Type * Account Name	Transit/Routing Number      Account Number	* Type * Amount *		
	1 • Checking •		Percent • 100		add
Upload Hies: Upload hie					
	upidau mies: upidad nie				

#### **Review and Submit**

The employee can review the status of all edits made, as well as sections completed. When the new hire is ready to submit their onboarding paperwork for approval, they click the **Submit** button.

Welcome	Personal	Form I-9	Consent Forms	Tax Election	Direct Deposit	Review & Submit	Summary
	ns!	ssfully submited Tran	saction ID:58887730				ĺ
				Exit	Attentio		
					You con will creden	I have completed the ne npany has reviewed the receive a communicati Itials.	w hire process. Once the information you provided, you on with your system log in
1							ОК

After the new hire submits their electronic onboarding, administrators will receive an email.

Note: To receive completed onboarding notifications, administrators must have the correct security role.

Once the new hire has successfully entered and submitted their information, and the administrator approves the information, the new hire is now an employee.

The administrator approves the Self Registration information in Administration – New Hire.

C Home >	Administration > New Hire		-Type to Search-	•	Advanced Search	My Saved Searches	
😂 Delete						<b>∀</b> appro	ived 🔀 not approved
	New Hire Type	New Hire				Start Date	Step
	Self Registration	mearyan 🏧				12/27/2015	Employment     Personal     Consents     Taxes     Direct Deposit     Eorn 19     Review & Submit

Once a new hire's information is approved and submitted by the administrator, the employee will no longer appear in the **New Hires** section of the system.

The new hire will receive a confirmation email that they have completed the Self Serve Onboarding process.

#### The HR Administrator then performs the review and approval task:

Once the new hire completes entering their information, the HR Administrator will receive a task notification and can then review, approve, and finalize the new hire. Administrators use the New Hire area to review any in progress or outstanding new hires. They can review progress, add/edit information, and approve and submit new hires.

1. From the main Advanced HR screen, the HR Administrator goes to Administration – New Hires.

Result: The system displays the **Onboarding Dashboard**, where the administrator can view all in process onboarding employees; both those added manually and those who have been processed through Self Service Onboarding.

Home > Administration > New Hire		-Type to Search-	Advanced Search	My Saved Sa	arches
🙀 Delata				🛩 appr	oved 🔀 not approved
New Hire Type	New Hire			Start Date	Step
T.	<b>x</b>				
and Respective	160111 🥌			10/02/2015	Environment     Environment     Environment     Conneents     Taxem     Environment     Form 19     Review & Submit     Review & Submit
G Addiexilla	Salarenalditä 🍩			08/17/2015	Engloameni     Engloani     Engloani     Eorect Deposit
Add New Hes	A8seler 2021			08/01/2015	Consents     Consents
					Employment

Note any red check marks to the right which indicate items that are still outstanding that need to be processed.

- 2. For each new hire, click on their name (or on the step you want to complete) and then review all of the information tabs (including the **Consent** tab if this is a Self Service Onboarding). Click the **Approve** button at the lower-right of each screen.
- 3. Move to the **Review and Submit** screen.

Employment Personal	Consent Taxes	Direct Deposit Form IB	Pay Period	Review & Submit	Summary	
Name : A5later2021				Emp No : 2900		
new & Submit						
8.No	Status		Btap			CompletionDate
1	2		Employmen	1		8/31/2015 8/31/2015
2	X		Consents			8/31/2015
4	X		Taxes			9/30/2015
5	3		DirectDepos	at .		8/31/2015
6	Ø.		(BeVierify			9/30/2015
7	<i>⊗</i> <sub>L₂</sub>		PayPeriod			10/15/2015
lubmit						

4. Click the **Submit** button at the lower-left of the screen and as the administrator you will receive a confirmation that everything has been submitted.

The new hire will receive an email saying Welcome to the Company – Everything has Been Completed and also receive their temporary credentials to be able to access the Employee Portal. On the Employee Portal the new hire can view all of their consent documents. If they were using the Self Service Onboarding – then all applicable documents will be already located in their Employee Folder.

The new employee has now been officially onboarded and the Administrator is now able to view that employee on the regular Employee dashboard – main screen.

#### The HR Administrator adds Payroll Information to the new hire:

Now that the information has been submitted, the HR Administrator goes to the **Employee – Employee Payroll** menu and finds the New Employee.

- 1. On the Labor Defaults tab, select the Organizational level to which this employee belongs as well as any Workers compensation codes, jobs, unions and pay groups. For companies using GL export, you can assign a General Ledger tag to the employee at this time. Click Next when complete.
- 2. On the ACA tab, ensure that all default values are correct. Update any fields needed. Click Next when complete.
- 3. If this employee is an Hourly employee, the hourly rate from earlier should already be entered here. If there are additional rates or organizational levels needed for this rate, update at this time. Click **Next** when complete.
- 4. Update the W-2 or 1099 information as needed on the **Federal** tab. Click **Next** when complete.
- 5. Add the Employee's State, SUI State, SDI State, Home State, State Marital Status and Tax Exemptions on the **State** tab. Click **Next** when complete.
- 6. If the state is not in the list, the state will need to be added to the company in Evolution Classic **Company Taxes States** tab.
- 7. Use this tab to also update the Reciprocation method as well as any State Tax exemption statuses and overrides such as Minimum Wage.
- 8. On the Locals tab, add any locals that this employee will need to be taxed in. Click Next when complete.

- 9. On the **Child Support** tab, enter any child support cases that will be used to create a Child Support Scheduled E/D. Click **Next** when complete.
- 10. On the **Direct Deposit** tab, enter the Direct Deposit accounts that will be used to create a Direct Deposit Scheduled E/D. Click **Next** when complete.
- 11. On the **Scheduled E/D** tab, enter any scheduled E/Ds needed for this employee such as Direct Deposit or Child Support. Click **Next** when completed.
- 12. On the **Time Off Accrual** tab, add any Time Off Accrual plans that this employee will be eligible to use. Existing balances can be added or adjusted here.
- 13. On the **Notes** tab, add any Payroll notes for this employee.
- 14. Click the Save icon to save this employee.

Once completed, if the employee will be logging into the Employee Portal, you can now go to **Setup – Manage Passwords** and update the employees Username and Password as needed.



### Terminating an employee

Terminating an employee in Advanced HR is completed from the **Employee – Employment** screen.

- 1. Locate the employee and go to the **Employee Employment** screen.
- 2. Select the change reason, if applicable.
- 3. Update the **Status** to the appropriate termination status.
- 4. Select or deselect the **OK to Rehire** field as needed.
- 5. In the **Employment Dates** section, select the **Term Expiration** date as the date of termination.
- 6. Select the termination reason.
- 7. Click on **Save** when complete.

**Note:** Termination Reason values can be added to Advanced HR in the Setup – Default Tables Setup – Employment Profile – Termination Reason menu.

Employment Profile	;		Employment Dates	
Change Reason:	Select	_	Hire Date:	9/1/2014
Status:*	Voluntary Resignation		Original Hire Date:	
Position Status:*	N/A 👻	_	Seniority Date:	
Туре:	W-2		Term Expiration Date:*	6/30/2016
Employee Number:*	23		Termination Reason:	Resignation with eligibility for rel
Time Clock Number:			ų	
Job Title:*	Trainer 💌		Last Paid Date:	
Job Cost Number:	Select		Last Pay Raise:	
Training Track:	Evolution HCM Training		Last Promotion:	
Benefit Class:	Full Time Employee		Last Review Date:	
Job Class:	Select		Next Review Date:	
FLSA Exempt :	No		New Hire Report Date:	
Work Phone:	(802)566-8524 Ext		New Hire Reported:	
Work Email:*	tleavitt@evolutionhcm.com			
Badge Number:				
OK to Rehire:				

# Chapter 3: Job Titles

The system comes with a default Job Title of **N/A**. Job titles are part of Job Profiles which will be discussed more in depth in the training that concerns Enabling Position Management. A *Job Profile* allows you to build each job title with a job description. In addition, you can add job duties, qualifications, compliance codes, compensation plans, and physical, mental, and environmental conditions to each job profile.

For now, we will only be adding Job Titles to the system. There are two ways to add Job Titles to Advanced HR:

- Via the Import Utility
- Using manual entry

The Import Utility allows you to upload multiple Job Titles in bulk. Manual entry requires one entry for each Job Title. Multiple employees may then be assigned to a single Job Title.

## Adding Job Titles via the Import Utility

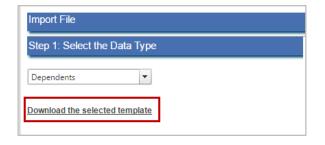
- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Utilities Import Utility.



3. Select **Job Titles** as the Data Type.

Step 1: Select the Dat	a Type		
nep 1. Select the Da	атуре		
Dependents	-		
Job Titles			
Dependents			
Training Classes			
Training Attended			

4. Click on the **Download the selected template** hyperlink to provide you with the template for formatting your Job Title import as a downloaded .csv file.



You will see the download appear as a .csv file.

Jobs Import (1).csv
---------------------

- 5. Open the Jobs Import.csv file and delete all but the first row that contains the **Job Title** and **Description** in two columns.
  - В С D A Е Job Title Description 2 Job100 Job from Import functioanlity 3 job100 Job from Import functioanlity 4 job102 Job from Import functioanlity 5 job103 Job from Import functioanlity 1 6 1= Jobs Import (1) ( + )
- 6. Populate your Job Title along with Description, one per row under the appropriate headings.

	А	В
1	Job Title	Description
2	Hostess	Hostess
3	Server	Server
4	IT Manager	The IT Manager will supervise the implementation and maintenance of our company's computing needs.

- 7. Save your Jobs Import.csv. You may change the file name. Leave the file type as .CSV.
- 8. Navigate to **Step 4: Import the File** and click **Choose File**. *Do not* put a check in the **"Is the Company Position Enabled**" box if your company does not have Position Management Enabled.

Step 4: Import the File	J
Is the Company Position Enabled.	
Select File :	
Choose File No file chosen	
✓ Has header	
Upload file Reset	

9. Navigate to your Jobs Import file, select **Open**. The file name will then appear next to the **Choose File** button.

					Step 4: Import the File
€	is PC → Desktop → Shelburne Inn				Is the Company Position Enabled.
Organize 👻 New folde	r				Select File :
☆ Favorites	Name	Date modified	Туре	Size	Choose File No file chosen
1 This PC	Jobs Import_shelburne inn_20151201	12/1/2015 4:21 PM	Microsoft Excel C	1 KE	Choose File No file chosen
隆 Desktop					Has header
Advanced HR					Upload file Reset
Employee Photos					opioad nice incost
🎍 Shelburne Inn					

Evolution<sup>®</sup> Advanced HR

10. Click **Upload file**. Review and Accept your data. If the data is correct, click **Import the Data**.

Home > Utilities	s > Import Employees
Upload File	Map Fields Review Data Import Summary
Review & Accept	
	ata below and match up the field with data from your file. Jed you verify a few rows to confirm that your data corresponds to the correct column
Column	Your data
lob Title	Trainer
Description	Trainer
Complete the Imp	port
the data is correct, o	complete the Import now.
Import the Data	Cancel

- 11. Review the Data.
- 12. Place a check mark in the box next to the **Is Valid** field to verify the accuracy of the data to be imported.

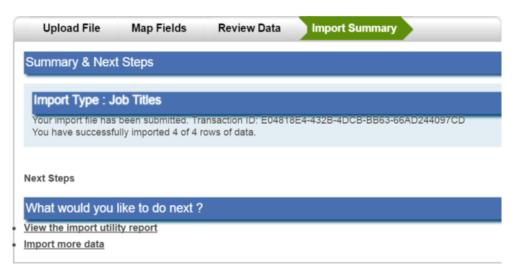
Upload Fi	ile	Map Fields	Review Data Import Su	mmary			
Review & Im	nport						
			h up the field with data from your file ows to confirm that your data corresp	onds to the correct column.			
✓ Valid record	i	XInvalid record	Job Title already exists				
Following Fields are required: Job Title , Description.							
Note: To check	the ur	nmapped field ple	ase click the IsValid image button	below in.			
lsValid		Edit		Job Title	Description		
1		$\oslash$		Trainer	Trainer		
1		0		Hostess	Hostess		
1		2		Server	Server		
1		2		IT Manager	The IT Manager will supervise the implementation and maintenance of our company's computing needs		

13. Click Import the Data under Complete the Import once the data has been verified and is correct.





14. An **Import Summary** screen will display to confirm the file was successfully imported and will list how many rows of data were imported.



15. The Job Titles now reside in Advanced HR and will be listed in **Administration – Job Profiles**. Please reference how to associate an employee with a Job Title in the *Assigning an Employee a Job Title* section of this document.

C Home > Administration > Job Profiles				-Type to Search-	•	Advanced Search	My Saved Searches
Job Profile Library							
Add							
S.No	Title	Created Date	Modified Date				Action
1	Hostess	12/01/2015	12/01/2015				Active 🔽
2	IT Manager	12/01/2015	12/01/2015				Active
3	N/A	10/29/2015					Active 👻
4	Server	12/01/2015	12/01/2015				Active
II I ► ► Page size: 5 ▼							4 items in 1 pages



# Manually adding a Job Title

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Job Profiles.



3. Click Add and select the Create a New Job Profile option button.

Add New Job Profile			
<ul> <li>Select from Job Profile Library:</li> <li>Create New Job Profile:</li> </ul>	Select	•	Copy Profile
	Return to Main Page		

4. Enter **Job Title** (required) and **Job Description** (required).

Please save the Job titl	before proceeding further.	
Job Profile :		
Job Code :		
Job Title :*	Vice President, Engineering	
	Vice President, Engineering	
Job Description :*		

5. Click Save.

The Job Titles now reside in Advanced HR and will be listed in **Administration – Job Profiles**. Please reference how to associate an employee with a Job Title in the *Assigning Employee Job Titles* section of this document.

🙆 <u>Home</u> > Adminis	tration > Job Profiles		-Type to Search-	•	Advanced Search	My Saved Searches	
Job Profile Library							
🛟 Add							
S.No	Title	Created Date		Modified Date			Action
1	<u>N/A</u>	12/11/2015					Active -
2	Vice President - Engineering	12/14/2015					Active
3	Vice President - Marketing	02/03/2016		02/03/2016			Active -
	Page size: 5 💌						3 items in 1 pages

## **Editing Job Titles**

Job Titles and Job Descriptions often change within an organization. Advanced HR allows you to easily make updates within the Job Profile Library interface that will automatically be applied to all current employees that are assigned a particular Job Title.

In the example below, the Director of Human Resources has made the decision to change the Job title of Vice President, Engineering to Vice President of Engineering. The Director of Human Resources has also come up with a brief description to highlight the responsibilities that accompany the Job Title.

To edit a Job Title:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Job Profiles.

<u>Home</u> > Admir ob Profile Librar	nistration > Job Profiles Y	JOB REQUISITION S Candidate Database NEW HIRES Add New Hire Self Service On Boarding Add New Agent	JOB PROFILES Job Duties Job Qualifications PME
Add S.No	Title <u>N/A</u>	BENEFITS Employee Benefit Electio Benefit Classes Eligibility Group	ns
2	Vice President - Engineering	Waiting Periods Life Events	
3	Vice President - Marketing	Dependent Types Primary Care Physician COBRA Approve Life Events	
		Update Life Events Employee Plan Terminati	on

3. Click on the hyperlink of the Job Title you want to edit.



C Home > Administr	ration > Job Profiles		-Type to Search   Advanced Search  My Saved Sear	<u>ches</u>
Job Profile Library				
🛟 Add				
S.No	Title	Created Date	Modified Date	Action
1	<u>N/A</u>	12/11/2015		Active 🔽
2	Vice President - Engineering	12/14/2015		Active 👻
3	Vice President - Marketing	02/03/2016	02/03/2016	Active 👻
	Page size: 5 💌			3 items in 1 pages

4. Make edits to the **Job Title** and/or **Job Description**.

Job Profile : Vice Pres	ident - Engineering
Job Code :	
Job Title :*	Vice President - Engineering
Job Description :*	The Vice President - Engineering manages and directs corporate engineering for the company. The priorities for this position include strategic planning, product design, quality assurance and problem resolution.
Preview Job Profile	

5. Click **Save & Close** or **Save**. You will receive a message to indicate that the update to the Job Profile was successful.



# Inactivating Job Titles

Some jobs may be seasonal and thus only be applicable during specific months for example or due to budget constraints, a job may be cut indefinitely. Users can inactivate a Job Title in Advanced HR to accommodate these circumstances. Inactivating a Job Title retains the associated Job Title and description information in the system, unlike deleting a Job Title, and the Job Title may be activated again at any time. Employees assigned a Job Title that is inactivated will not be impacted, the inactivated Job Title remains assigned to that employee.

To inactivate a Job Title:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Job Profiles.

mployees Payroll Communic	ations Expenses	Administration Re	porting Utilities Se
Home > Administration > Job Profile Job Profile Library	S	JOB REQUISITION S Candidate Database NEW HIRE S Add New Hire Self Service On Boarding Add New Agent	JOB PROFILES Job Duties Job Qualifications PME
Add S.No Title		BENEFITS Employee Benefit Electio Benefit Classes	ns
	dent - Engineering	Eligibility Group Waiting Periods Life Events	
3 Vice Presi	dent - Marketing	Dependent Types Primary Care Physician COBRA Approve Life Events	
		Update Life Events Employee Plan Terminati	on

3. Locate the Job Title you would like to inactivate and select **Inactive** under the column with the **Action** heading.

Job Profile Lit	srary			
💠 Add				
S.No	Title	Created Date	Modified Date	Action
	T			
6	Front Desk	12/10/2015	12/10/2015	Inactive 💌
7	Garden Center Worker	03/31/2016	03/31/2016	Active
8	Hostess	12/10/2015	12/10/2015	Active
9	HR Assistant	12/09/2015	12/09/2015	Delete
10	instructor	02/03/2016	02/03/2016	inactive 👻
H 4 1 2	3 4 5 F H Page size: 5 -			22 items in 5 pages

4. The Job will now be listed as **Inactive** within the Job Profile Library.

Job Profile L	Library			
💠 Add				
S.No	Title	Created Date	Modified Date	Action
	T			
10	Fry Cook	05/26/2016	05/26/2016	Active
11	Garden Center Worker	03/31/2016	03/31/2016	Active 🔽
12	Hostess	08/12/2016	08/12/2016	Inactive 👻
13	HR Assistant	12/09/2015	12/09/2015	Active 🔽

Employment Profile		
Change Reason:	Select	•
Status:*	Active	•
Position Status:*	N/A	•
Туре:	W 2	•
Employee Number:*	1	
Time Clock Number:		
Job Title:*	N/A	•
Job Cost Number:	Select Administrative Assistant	
Training Track:	Assistant to the Assistant Manager	
Benefit Class:	Asst. Sales Manager CEO	
Job Class:	Computer Systems Analyst Dairy Plant Manager	
FLSA Exempt :	Dog Catcher Front Desk Operator	
Work Phone:	Fry Cook	
Work Email:*	Garden Center Worker HR Assistant	
Badge Number:	HR Manager IT Manager	
	Manager of Managers	

The Job Title will no longer be available to assign to employees going forward, as it is removed from the **Job Title** drop-down list available in the **Employees** – **Employment** screen. Employees already assigned the Job Title will retain the Job Title in Advanced HR.

# **Deleting Job Titles**

As responsibilities transform and jobs change, sometimes job titles need to be eliminated. Advanced HR allows you to delete Job Titles when they are no longer required.

To delete a Job Title:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Job Profiles.

Employees   Payroll   Communications   Expenses	Administration   Reporting   Utilities   Set
Home > Administration > Job Profiles Job Profile Library	JOB REQUISITIONS Candidate Database Job Duties Job Qualifications NEW HIRES Add New Hire Self Service On Boarding Add New Agent
Add S.No Title	BENEFITS Employee Benefit Elections Benefit Classes
N/A       2     Vice President - Engineering	Eligibility Group Waiting Periods Life Events
3     Vice President - Marketing       If I F FI Page size: 5 •	Dependent Types Primary Care Physician COBRA
	Approve Life Events Update Life Events Employee Plan Termination

3. The Job Title will no longer be visible in the Job Profile Library or available to assign to employees.

lob Profile I	_ibrary			
🔶 Add				
S.No	Title	Created Date	Modified Date	Action
	T			
10	Fry Cook	05/26/2016	05/26/2016	Active
11	Garden Center Worker	03/31/2016	03/31/2016	Active
12	<u>Hostess</u>	08/12/2016	08/12/2016	Inactive
13	HR Assistant	12/09/2015	12/09/2015	Active

**Note**: If you delete a Job Title that is currently assigned to employees, it will remove that Job Title from the employee. The employee will not have an assigned Job Title. When deleting Job Titles in use by current employees, be sure to assign them a new Job Title.

#### Example - Employee in the Employee List **before** a Job Title is deleted:

Employee List						
Username	SSN	Emp ID	Last Name	First Name	Job Title	Status
T	T	T	T	T	T	T
SophieAllan15146	330-55-3222	15	Allan	Sophie	Dairy Plant Manager	Active
allenA	549-66-4534	64	Allen	Andrew	CEO	Active
reports	330-55-3214	7	Alsop	Robert	N/A	Active
JessicaBlack36146	443-27-6329	36	Black	Jessica	Trainer First Class	Active
AnneBlake16146	330-55-3223	16	Blake	Anne	Reception	Active

#### Example - Employee in the Employee List **after** Job Title is deleted:

Employee List						
Username	SSN	Emp ID	Last Name	First Name	Job Title	Status
T	T	T	T	T	T	T
SophieAllan15146	330-55-3222	15	Allan	Sophie	Dairy Plant Manager	Active
<u>allenA</u>	549-66-4534	64	Allen	Andrew	CEO	Active
reports	330-55-3214	7	Alsop	Robert	N/A	Active
JessicaBlack36146	443-27-6329	36	Black	Jessica		Active
AnneBlake16146	330-55-3223	16	Blake	Anne		Active

#### Employee record within the Employees – Employment screen is reverted to the Select a Job Title option:

Employment Profile		
Change Reason:	Select	-
Status:*	Active	•
Position Status:*	N/A	•
Туре:	W-2	•
Employee Number:*	36	
Time Clock Number:		
Job Title:*	Select	-
Job Cost Number:	Select	•
Training Track:	Select	•

# Assigning Employee Job Titles

Once you have populated the Job Library with Job Titles either manually or utilizing the Import utility, you are now able to assign a Job Title to an employee.

To assign a Job Title to an employee:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to the **Employees Employment** tab and search for the employee to whom the Job Title will be assigned.

rious Employee Audrey Rampling-56 Employee: Au							
nployment Pay Worker's Comp Discipline Points FMLA/LEAVE							
Employment Profile	•						
Change Reason:	Select	•					
Status:*	Active	•					
Position Status:*	N/A	-					
Туре:	W-2	•					
Employee Number:*	33						
Time Clock Number:							
Job Title:*	Select	•					
Job Cost Number:	Select	•					
Training Track:	Front End Staff	•					
Benefit Class:	Select	-					
Job Class:	Select	•					
FLSA Exempt :	No	•					
Work Phone:	(802)566-8534 E	Ext					
Work Email:*	tleavitt@evolutionhcm.	com					
Badge Number:							

3. From the drop-down list, select the **Job Title** to assign to the employee in context.

Employment Profile	2	
Change Reason:	Select	•
Status:*	Active	•
Position Status:*	N/A	•
Туре:	W-2	•
Employee Number:*	33	
Time Clock Number:		
Job Title:*	Hostess	-
Job Cost Number:	Select	<b>_</b>
	select	· ·
Training Track:	Front End Staff	•
Training Track: Benefit Class:		

4. Click **Save**. You will receive a message to indicate that the update to the Job Title was successful.

Employment Pay	Worker's Comp	Discipline Points	FMLA,
📀 Successfully upda	ated !		
Employment Profile	)		
Change Reason:	Select	•	
Status:*	Active	•	
Position Status:*	N/A	•	
Туре:	W-2	•	
Employee Number:*	36		

# Adding reasons for points

If the organization uses a point system, such as points for tardiness or missed work time, points by infraction can be stored on this tab.

To add a Reason for Points:

1. Go to Setup – Default Tables Setup – Employment Profile – Points-Reason.

Home > Setup > Default Tables Setup		
DEFAULT TABLES SETUP		
NEW HIRE	EMPLOYMENT PROFILE > Points-Reason	
I9 DOCUMENTS	🖶 Add 😂 Delete	
COMMUNICATION	Reason	Value
EEO-JOB		
PERSONAL PROFILE	T	
EMPLOYMENT PROFILE	Late Without Calling	5.00
Bonus Type	I I Page size: 10 -	
Change Reason	raye size. 10 +	
Communication Method		
Compensation Per		
Discipline Plan		
Employment Status		
Employment Types		
FLSA Exempt		
Infraction Type		
Issuing Authority		
Pay Frequency		
Pay Types		
Points-Reason		
Shift Premium		

- 2. Click Add.
- 3. Enter information.

EMPLOYMENT PROFILE > Points-Reason	
	* indicates mandatory fields!
Code :*	LWC
Reason :*	Late Without Calling
Value :*	5
Save Cancel	

• **Code**: Code for Points-Reason (required).



- **Reason**: Reason for infraction (required).
- Value: Points assigned for the infraction (required).

#### 4. Click Save.

EMPLOYMENT PROFILE > Points-Reason		
Confirmation : SuccessFully Saved!		
Add 😫 Delete		
Reason	Value	
T		
Late Without Calling	5.00	
H I H Page size: 10 -		1 items in 1 pages

You will receive confirmation that the Points-Reason was saved successfully.

Points are now available to be assigned in the **Employees – Employment Points** screen.

Employment I	Pay Worker's Comp Discipline	Points FMLA/LEAVE	View Change History
			* indicates mandatory fields!
Points			
Date:*	5/12/201€		
Reason:*	Late Without Calling		
Comments:	Arrived 47 minutes after shift started.		
Save Cano	zel		

Information is now displayed in the **Employees – Employment Points** screen view, including any comments that were added to the employee record.

Previous Employee	Employee: Alice Goode01	Show Concealed: View All	Next Employee Bill Lizard-09
Employment Pay Worker's Comp Disci	pline Points FMLA/LEAVE		View Change History
💠 Add 😂 Delete			
Reason	Comments	Date	Amount Balance
Ţ	Ţ		T
Late Without Calling	Arrived 47 minutes after shift started.	05/12/2016	5.00 5
H I FH Page size: 5 V			1 items in 1 pages

# Chapter 4: Certifications & Licenses

The term *certification* is often used as a catch-all term for several different activities that apply to the credentialing of individuals and institutions. Employee certifications and licenses are required for compliance in certain industries; they can also serve as important designations that impact salary decisions.

**Professional certification uses a formal process** to identify and acknowledge individuals who have met a recognized standard. Usually this standard includes education, experience, and an exam of knowledge, skills, and abilities needed to perform the job. When an individual meets the standard, he or she receives certification from a certifying agency.

**Licensure** is a *non-voluntary* process by which an agency of *government* regulates a profession. It grants permission to an *individual* to engage in an occupation if it finds that the applicant has attained the degree of competency required to ensure the public health, safety, and welfare will be reasonably protected.

Advanced HR provides the ability to record and document employee certifications and licenses in the employee record.

**Note:** Default Table Setup is required to populate fields utilized in the Certifications and Licenses Employee Employment Record. The field information is detailed below.

### Certifications & Licenses Type

The Certifications & Licenses Type table is populated with 5 default values:

- Medical
- Permanent
- Professional
- Provisional
- Technical

It displays on the Employee - Talent Management - Certifications & Licenses - Certification screen.

					View Change Hist
alent Management	Certifications & Licenses Training Employee	View			<u>The change may</u>
Certifications & I	Licenses				
		* indicates	mandatory fields!		
		mulcaces	manuacory netus:		
Certification Numb	er:				
Type:*					•
type.	Select				
Name:	5 Year Senior Professional Educator License				
Driver's License	Medical				
Number:	Permanent				
Driver's License Country:	Professional				
Jound	Provisional				
License State:	Technical				
ssued by:	-Select V			h	
Certification:	-Select- 🔻				



### **C&L** Certifications

The C&L Certifications table has no default values. It displays on the **Employee - Talent Management -Certifications & Licenses - Certification screen.** 

ent Management	Certifications & Lic	enses	Training Employee View
ertifications & L	icenses		
Certification Numbe	r:		
Type:*	Select		
lame:			
river's License lumber:			
)river's License Country:	USA	$\overline{\mathbf{v}}$	
icense State:	Select	~	
ssued by:	-Select-	$\nabla$	
ertification:		•	
ocument:	Select		
Choose File No fi	e Certificate of training.	set	
	Citrix Certified		
EACHING FIELD	Associate – Networking		
+ Add new record	Citrix Certified		
	Associate - Virtualization		
REA	Citrix Certified	AREA	NUMBER
T	Expert -		T
	Virtualization		
	Citrix Certified		
	Professional – Mobility	~	
	Citrix Certified		
NDORSEMENTS	Professional –		
	Networking		
+ Add new record	Citrix Certified Professional -		
	Virtualization		
			1001 E DATE

### **C&L Endorsements**

The C&L Endorsements table has no default values. It displays on the **Employee - Talent Management -Certifications & Licenses - Endorsement - Add Endorsement** drop-down.

License State:	Select	$\nabla$			Notes:		
Issued by:		V		Add Endorsem	ent	×	
Certification:	-Select	T		ENDORSEMENT	rs	- î	
Document: Choose File No file	chosen	Reset		Endorsement :*	-Select-		
		Reset		Issue Date :	Select American Sign Language		
TEACHING FIELD				Expiration Date :	Haz Mat Endorsement		100
+ Add new record					Key to the city Save Cancel	1 11	
AREA		AREA NUMBER				- 11	PIRATION DATE
Ţ			T				
						-	
	▶  Page size: g						



#### C&L Areas

The C&L Areas table has no default values. It displays on the **Employee - Talent Management - Certifications & Licenses - Teaching Fields - Add Area** drop-down.

Select 🔻			Notes:		
-Select-	🚍 Add	Area		×	
-Select ▼ īile chosen Res	Area : Issue	Date :Select Advanced level for	-		
Af Page size: 5		Coverages Elementary Level			

## Adding Talent Management default values

To add Talent Management, Certifications & Licenses default values in the setup tables:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Setup Default Tables Setup Talent Management.
- 3. Click on the Category of the **Talent Management** or C&L Default Value to which you would like to add values.
- 4. Click Add.

DEFAULT TABLES SETUP NEW HIRE 19 DOCUMENTS	IRE TALENT MANAGEMENT > C&L Certifications				
COMMUNICATION		Name	Description	Codes	
EEO-JOB		T		T	
PERSONAL PROFILE					
EMPLOYMENT PROFILE		Citrix Certified Associate – Networking	Citrix Certified Associate – Networking	CCA - N	
TALENT MANAGEMENT		Citrix Certified Associate - Virtualization	Citrix Certified Associate - Virtualization	CCA - V	
Level Graduated		Citrix Certified Professional - Virtualization	Citrix Certified Expert – Virtualization	CCE - V	
Honorary Recognition		<u>Citrix Certified Professional – Mobility</u>	Citrix Certified Professional – Mobility	CCP - M	
Certifications & Licenses Type C&L Job Assignments		Citrix Certified Professional – Networking	Citrix Certified Professional – Networking	CCP - N	
C&L Certifications		Citrix Certified Professional - Virtualization	Citrix Certified Professional - Virtualization	CCP-V	
C&L Endorsements C&L Areas		Microsoft Certified Professional	Microsoft Certified Professional	MCP	
JOBS AND POSITIONS		< 1 ► ► Page size: 15 ▼			

5. Enter the C&L Default values into the required fields for the Category you selected.



TALENT MANAGEMENT > C&L Certifications					
	* indicates mandatory fields!				
Name*					
Description/Label :*					
Code :					
Save Cancel					

6. Click Save.

The Default Values will now appear as values in the **Employees - Talent Management - Talent Management** and **Employees - Talent Management - Certifications and Licenses** tab.

## Adding Certifications & Licenses to an employee record

- 1. Go to Employees Talent Management Certifications and Licenses tab.
- 2. Once your employee is in context, select Add.

Previous Employee		Employee : Abigail Brown-23	▼ 🕢	Show Concealed: View All		Next Employee Adam Rees
Talent Management	ertifications & Licenses Training Employee Vie	ew				View Change Histor
🛱 Add 😂 Delete						
П ТУРЕ	LICENSE NUMBER	ISSUING STATE	ISSUE DATE	RENEWAL DATE	EXPIRATION DATE	DOCUMENT
			No Data Available			
	Page size: 5 T					0 items in 1 pages

- 3. Enter relevant data in the fields.
- 4. Click Save.

## Adding Teaching Fields to an employee record

- 1. Go to Employees Talent Management Certifications and Licenses tab.
- 2. Once your employee is in context, click Add.
- 3. Under the Teaching Field, click on Add new record.

TEACHING FIELD					
+ Add new record				🖒 Refresh	
AREA	AREA NUMBER	ISSUE DATE	EXPIRATION DATE		
T	T				
	No Data Available				
Image: size:     5					

- 4. Select **Area** from the drop-down menu and enter relevant data in the fields.
- 5. Click Save.

# Adding Endorsements to an employee record

- 1. Go to Employees Talent Management Certifications and Licenses tab.
- 2. Once your employee is in context, click **Add**.
- 3. Under Endorsements, click the Add new record button.

ENDORSEMENTS			
+ Add new record			🖒 Refresh
AREA	ISSUE DATE	EXPIRATION DATE	
T		T T	
		No Data Available	
Page size: 5 V			0 items in 1 pages

- 4. Select **Area** from the drop-down menu and enter relevant data in the fields.
- 5. Click Save.

# Chapter 5: Training Administration

Advanced HR provides training class administration. You can add classes, assign schedules to classes, and set training tracks for employees individually or by position. Employees can enroll in eligible classes, and the training administrator can view employees and classes in a dashboard.

### Training class terminology

It is important to understand class terminology and concepts in Advanced HR.

Term	Definition		
Class Management	Classes are the courses you create in Advanced HR. Class Management is a training activity covering specific content, and provides entry for costs and hours.		
Class Schedules	Dates and times can be assigned to each course. This creates schedules for each class. <b>Note:</b> Employees enroll in a class with a schedule. Classes plus schedules are a subset of a Class. Each class can have multiple class schedules.		
Training Track	Training tracks are collections of classes that an employee is eligible to enroll in and complete. Classes can be added to a training track and then assigned to individual employees or positions.		

# Training Class setup

### Adding a new class

Classes are the courses you create in Advanced HR. Class schedules are listed for each class.

Note: You cannot manage classes from the scheduler area.

To add a new class:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Training Classes.

Administration Rep	orting Utilities	Setup	
JOB REQUISITIONS	JOB PROFILES	POSITIONS	COMPENSATION
Candidate Database	Job Duties	RECRUITING PROFILES	MANAGEMENT
NEW HIRES Add New Hire	Job Qualifications PME	Recruiting Questions Recruiting Documents	TRAINING Tracks
Self Service On Boarding		ONBOARDING PROFILES	Classes
Add New Agent		Consent Documents	TRAINING MANAGER

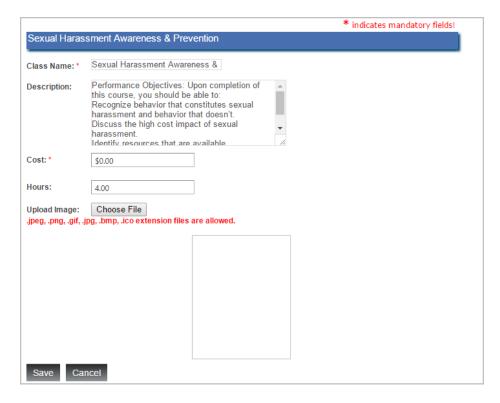
3. Click on **Manage Classes** to navigate to the class management section of the setup.



Classes					
					Manage Classe
Class Name	Start Date	Start time	Attendees	Status	
T				T	
Sexual Harassment Awareness & Prevention	01/01/2016	2:00:00 PM	<u>0</u>	Completed	/ X
Company Culture 101	01/04/2016	12:00:00 AM	<u>0</u>	Completed	/ X
Will's Class	01/01/2016	12:00:00 AM	1	Completed	/ X
Sexual Harassment Awareness & Prevention	01/01/2016	12:00:00 AM	<u>0</u>	Completed	/ X
Competitve Positioning within our Market	02/01/2016	12:00:00 AM	1	Completed	/ X
I∢ ◀ 1 2 3 4 ► ► Page size: 5 ▼					18 items in 4 pages

#### 4. Click Add.

5. Enter Class information:



Field	Definition		
Class Name	Abbreviated name for the class. This will appear in the Employee Portal.		
Description	Extended description of the class.		
Cost	Cost of the class.		
Hours	The number of hours for the class.		
Image	<ul> <li>You can also add an image for the class.</li> <li>Click the Select button.</li> <li>Use the File Upload dialog to navigate and select an image.</li> <li>Click Open to attach the image to the class.</li> </ul>		



6. Click **Save**. You will receive confirmation that your class was successfully saved.

Mar	Manage Classes						
¢	Add 🗱 Delete		<u>Back</u>				
	Name	Description	Cost		Action		
	T	T		T			
	<u>Sexual</u> <u>Harassment</u> <u>Awareness &amp;</u> <u>Prevention</u>	Performance Objectives: Upon completion of this course, you should be able to: Recognize behavior that constitutes sexual harassment and behavior that doesn't. Discuss the high cost impact of sexual harassment. Identify resources that are available. Demonstrate techniques that can be used to prevent sexual harassment.	\$0.00		Edit Schedules Add Resources		

Your Class will now be visible in the Manage Classes screen found in Administration – Training Classes – Manage Classes.

Note: You cannot manage classes from the scheduler area.

#### Editing existing classes

To edit an existing class, click on the name of the class. This hyperlink will direct you to a class editor.

#### **Deleting classes**

To delete a class, select the check box to the left of the class name, and click the **Delete** button.

Note: You cannot delete a class if it is assigned to a training track. See Training Tracks for more information.

### Managing class schedules

Once a class is created, you can use the Add Schedules hyperlink to add dates and times for each class.

It is important to understand how Class Enrollment Periods are utilized in Advanced HR. Enrollment periods determine class schedules. You can group class schedules into defined class enrollment periods for each type of class you offer. Grouping class schedules by enrollment date provide a way to add classes with schedules in bulk.

You may use enrollment periods to add multiple schedules, or use enrollment periods to add one schedule, or use a combination of each based on specific class schedule need.

To manage class schedules:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Training Classes.

Administration Reporting Utilities Setup				
JOB REQUISITIONS	JOB PROFILES	POSITIONS	COMPENSATION	
Candidate Database	Job Duties	RECRUITING PROFILES	MANAGEMENT	
NEW HIRES Add New Hire	Job Qualifications PME	Recruiting Questions Recruiting Documents	TRAINING Tracks	
Self Service On Boarding		ONBOARDING PROFILES	Classes	
Add New Agent		Consent Documents	TRAINING MANAGER	



#### 3. Click on Manage Classes to navigate to the class management section of the setup.

Classes					
					Manage Classes
Class Name	Start Date	Start time	Attendees	Status	
T				T	
Sexual Harassment Awareness & Prevention	01/01/2016	2:00:00 PM	<u>0</u>	Completed	/ X
Company Culture 101	01/04/2016	12:00:00 AM	<u>0</u>	Completed	/ X
Will's Class	01/01/2016	12:00:00 AM	1	Completed	/ X
Sexual Harassment Awareness & Prevention	01/01/2016	12:00:00 AM	<u>0</u>	Completed	/ X
Competitve Positioning within our Market	02/01/2016	12:00:00 AM	1	Completed	/ ×
II 4 1 2 3 4 ▶ ▶ Page size: 5 ▼					18 items in 4 pages

#### 4. Click on the Add Schedules hyperlink next to the class that you are scheduling.

N	Manage Classes						
	¢	Add 😂 Delete		<u>Back</u>			
		Name	Description	Cost		Action	
		T	Y		T		
		<u>Sexual</u> <u>Harassment</u> <u>Awareness &amp;</u> Prevention	Performance Objectives: Upon completion of this course, you should be able to: Recognize behavior that constitutes sexual harassment and behavior that doesn't. Discuss the high cost impact of sexual harassment. Identify resources that are available. Demonstrate techniques that can be used to prevent sexual harassment.	\$0.00		Edit Schedules Add Resources	
		<u>Company Culture</u> 101		\$0.00		Edit Schedules Add Resources	
		<u>Competitve</u> <u>Positioning within</u> our Market		\$0.00		Edit Schedules Add Resources	
		<u>CPR-Heimlich</u> <u>Maneuver-AED</u> <u>Certification</u>	Cardiopulmonary resuscitation that includes a test demonstration on a mannequin Removing a foreign body causing an obstruction in an airway, and the Heimlich Maneuver	\$0.00	Ľ	Add Schedules Edit Resources	

#### 5. Click Add.

6. Enter the following information for the schedule:

Enroll Schedule			* indicates mandatory fields!
Enroll Start Date: * 5/1/2016			
Enroll End Date: *			
Schedule Date			
Schedule Start Date*	Schedule End Date*	Location	Maximum Class Size*
6/10/2016 12:00 A IIII 🛱	6/10/2016 12:00 A 🔠 🛱	Training Room D	15
Save Cancel			

Field	Definition
Enroll Start Date and Enroll End Date	The starting and ending date for the enrollment period for this class schedule (required).
Schedule Start Date and End Date	The starting and ending date for the enrollment period for this class schedule (required). You can add both a date and time to the Scheduled dates.



Field	Definition
	You can use the calendar icon $^{\fbox}$ and the time icon $^{\circlearrowright}$ to enter the date and time from a pick list rather than manually key it.
Location	Title and or description of the location (for example: "Training Room A").
Maximum Class Size	The maximum trainee capacity for the class (required).

Employees will only be able to enroll for the class during this timeframe.

7. Click **Save** when you are finished entering the schedule for this enrollment period.

You will receive confirmation that your schedule was saved successfully.

Confirmation : SuccessFully Saved!			
Training Class Name Sexual Harassment Awareness & Prevention			
Schedules			
Add 😫 Delete			
ClassName	Enrollment Start Date	Enrollment End Date	
T	<b>T</b>		
Sexual Harassment Awareness & Prevention	01/15/2016	01/29/2016	
H I I I Page size: 5 V			1 items in 1 pages
Back			

The class can now be viewed by navigating to **Administration – Classes** and will display the Start Date, Start Time, Attendees enrolled, and the status of enrollment.

Classes					
					Manage Classe
Class Name	Start Date	Start time	Attendees	Status	
T				T	
Sexual Harassment Awareness & Prevention	01/01/2016	2:00:00 PM	<u>0</u>	Completed	17
Company Culture 101	01/04/2016	12:00:00 AM	<u>0</u>	Completed	17
Will's Class	01/01/2016	12:00:00 AM	<u>1</u>	Completed	17
Sexual Harassment Awareness & Prevention	01/01/2016	12:00:00 AM	<u>0</u>	Completed	17
Competitve Positioning within our Market	02/01/2016	12:00:00 AM	1	Completed	17
I					18 items in 4 pages

#### Adding additional schedules using the same enrollment period

You can add additional schedules using the same enrollment period by going back to the class hyperlink within

**Manage Classes**. Click the button to add this schedule and enter another within the same dialogue box. Click the **Save** button when all schedules for this enrollment period have been entered.



			* indicates mand	atory fields!
Enroll Schedule				
Enroll Start Date: *				
Enroll End Date: *				
Schedule Date				
Schedule Start Date*	Schedule End Date*	Location	Maximum Class Size*	
1/1/2016 2:00:00 PM	4/1/2016 3:00:00 PM		10	۲
1/1/2016 12:00:00 AM	4/1/2016 12:00:00 AM		20	۲
			0	•
Save Cancel				

To edit schedules for a class, click the Edit Schedules hyperlink  $\checkmark$  .

To delete a class schedule, select the check box to the left of the class name, and click the **Delete** button.

#### Adding class resources

Once a class is created, you can use the **Add Resources** hyperlink to add web links and documents for the class. Documents may include a syllabus for the class, testing materials for self-study and/or a link to the Go To Training where the class will be hosted.

To add a Class Resource:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Training Classes.

Administration	orting Utilities	Setup	
JOB REQUISITIONS	JOB PROFILES	POSITION S	COMPENSATION
Candidate Database	Job Duties	RECRUITING PROFILES	MANAGEMENT
NEW HIRES Add New Hire	Job Qualifications PME	Recruiting Questions Recruiting Documents	TRAINING Tracks
Self Service On Boarding		ONBOARDING PROFILES	Classes
Add New Agent		Consent Documents	TRAINING MANAGER

3. Click on Manage Classes to navigate to the class management section of the setup.

Classes					
					Manage Classes
Class Name	Start Date	Start time	Attendees	Status	
T				T	
Sexual Harassment Awareness & Prevention	01/01/2016	2:00:00 PM	<u>0</u>	Completed	/ X
Company Culture 101	01/04/2016	12:00:00 AM	<u>0</u>	Completed	/ X
Will's Class	01/01/2016	12:00:00 AM	1	Completed	/ X
Sexual Harassment Awareness & Prevention	01/01/2016	12:00:00 AM	<u>0</u>	Completed	/ X
Competitve Positioning within our Market	02/01/2016	12:00:00 AM	1	Completed	/ X
H I 2 3 4 H Page size: 5 -					18 items in 4 pages

4. Click on Add Resources hyperlink next to the class for which you are scheduling resources.



Man	age Classes			
¢	Add 😂 Delete		Back	
	Name	Description	Cost	Action
	T	T		T
	<u>Sexual</u> <u>Harassment</u> <u>Awareness &amp;</u> Prevention	Performance Objectives: Upon completion of this course, you should be able to: Recognize behavior that constitutes sexual harassment and behavior that doesn't. Discuss the high cost impact of sexual harassment. Identify resources that are available. Demonstrate techniques that can be used to prevent sexual harassment.	\$0.00	<u>Edit</u> <u>Schedules</u> <u>Add</u> <u>Resources</u>
	<u>Company Culture</u> 101		\$0.00	<u>Edit</u> <u>Schedules</u> <u>Add</u> <u>Resources</u>

#### 5. Enter the Resource information:

Training Class Name : Sexual Harassment Awareness & Prevention			
Attachment List		URL List	
Select Save Cancel	٠		Ð

• To attach documents to the class:

Click the **Select** button to browse and attach a file.

Use the File Upload dialogue box to locate and select a file.

Click **Open** to attach the file to the class.

To add additional Attachments, click the 💷 button.

• To attach URL, or website links, to the class:

Type in the website link in the "URL" field.

**Note:** Enter the full website link, including http://, in the field provided.

To add additional web links, click the 🛨 button to the right of the URL field.

6. Click Save.

#### **Creating Employee Training Tracks**

To allow employees to register for classes, training tracks must be completed and assigned to either employees or positions.

To create a Training Track:

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to Administration Training Tracks.

Administration Rep	orting Utilities	Setup	
JOB REQUISITIONS	JOB PROFILES	POSITION S	<b>COMPENSATION</b>
Candidate Database	Job Duties	RECRUITING PROFILES	MANAGEMENT
NEWHIRES	Job Qualifications PME	Recruiting Questions Recruiting Documents	TRAINING
Add New Hire		-	Tracks
Self Service On Boarding		ONBOARDING PROFILES	Classes
Add New Agent		Consent Documents	TRAINING MANAGER

- 3. Click on Add.
- 4. Enter the following information:

		*indicates mandatory fields!
Training Trac	ks	
Track Name:*	2016 Restaurant Employee Trainin	
Description:	Training track for all employees at the Inn and Shoppes	
Select Classe	es	
	Class Name	
	T	
	Sexual Harassment Awareness & Prevention	
	Company Culture 101	
	Competitve Positioning within our Market	
	CPR-Heimlich Maneuver-AED Certification	
	Will's Class	
	Will's other class	
	Training Class	
	Test2 Class2	
	Field Harmonics	
	Training Class 2	
	Evolution	
	Payroll 101	
	Training Class 3	
	Creating A Class	

- Track Name: The name of the training track (required).
- **Description**: A more descriptive name for the training track.
- 5. Select **Classes** to add to the training track. Include all training classes for which employees assigned to the track are eligible to register. Select as many classes as you want by selecting the check box beside each class.
- 6. Click **Save**. The newly created Training Track will appear and is accessible by navigating to **Administration Training Tracks**.

To review Training Tracks, click the 😢 button beside the track on the Training Tracks summary screen. This will provide a detail of all classes assigned to the track:

Fraini	ng <sup>-</sup>	Fracks
🛟 А	dd	😂 Delete
		Track Name
		T
	D	Next Gen
	D	Evolution
	D	New track
	D	Front End Staff
	Ð	Payroll Track
	D	New Track 3
	D	Today's track
	D	Evolution HCM Training
	$\bigcirc$	2016 Restaurant Employee Training
		Class Name
		Sexual Harassment Awareness & Prevention
		Company Culture 101
		CPR-Heimlich Maneuver-AED Certification

To edit a Training Track, click the track name hyperlink.

To delete a Training Track, select the check box to the left of the track name, and click the **Delete** button.

#### Important Notes about Training Tracks:

-volution

- Training Tracks can be assigned to employees individually if Position Management is disabled. Visit the Employment screen for each employee to select a Training Track.
- If Position Management is enabled, Training Tracks must be assigned by position. All employees in that position are assigned the track by default.
- Add additional classes for employees to existing Training Tracks assigned to Employees or Positions. If an
  employee is assigned to a new Training Track, the classes of the new track become available and the
  employee progress is mapped on the newly assigned track, progress on the previous track is no longer
  recorded in the system.

# Associating a Training Track to an employee

Once classes have been created and you have created the Training Track, you now are able to associate an employee with a training track to enable enrollment in all of the classes within the Training Track.

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to the **Employees Employment** screen and click on the **Employment Profile** tab.
- 3. Once your employee is in context, select the Training Track to which your employee will be associated from the **Training Track** drop-down field.
- 4. Click on **Save**. You will be notified that the update was sucessful.

gress on the previous track is no longer					
Employment Profile					
Change Reason:	Select				
Status:*	Active				
Position Status:*	N/A 🔻				
Туре:	W-2				
Employee Number:	23				
Time Clock Number:					
Job Title:*	Trainer				
Job Cost Number:	Select				
Training Track:	2016 Restaurant Employee Traini				
Benefit Class:	FT Employee				
Job Class:	Select				
FLSA Exempt :	No				
Work Phone:	(802)566-8524 Ext				
Work Email:*	tleavitt@evolutionhcm.com				
Badge Number:					
OK to Rehire:					

#### Enrolling an employee in a training class

You can enroll an employee in a training class, provided you have associated a training track to the employee.

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to the Employees Talent Management screen and click on the Training Employee View tab.
- 3. Once you have your employee in context, identify the training class in which you want to enroll; click on the **Enroll** hyperlink.

Talent	Management Certifications & Licenses Ti	raining Employee View							View C	Change Histo
<b>\$</b>	Add 🗱 Delete									
	Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
	T				T	T				
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Not Enrolled		Enroll
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
	Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
	Budget Management	01/22/2016	01/25/2016 12:00:00 AM	01/25/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	1 2 P Page size: 5 -								6 items	in 2 pages

#### 4. Click **Save**. The employee will now appear as enrolled in the class.

Talent	Management Certifications & Licenses Tr	aining Employee View							<u>View Ch</u>	hange Hist
<b>\$</b>	Add 😂 Delete									
	Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
	T				T	T				
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Enrolled		Edit
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
	Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
	Budget Management	01/22/2016	01/25/2016 12:00:00 AM	01/25/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	1 2 P Page size: 5 -								6 items ir	n 2 pages

#### Updating employee completion of a training class

- 1. Navigate to your Advanced HR site and log in as the Administrator.
- 2. Go to the Employees Talent Management screen and click on the Training Employee View tab.
- 3. Once you have your employee in context, identify the training class which you want to update; click on the **Edit** hyperlink.

Talent	Management Certifications & Licenses T	raining Employee View							View C	Change Hist
¢,	Add 😂 Delete									
	Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
	T				T	T				
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Enrolled		Edit
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
	Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
	Budget Management	01/22/2016	01/25/2016 12:00:00 AM	01/25/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
H 4	1 2 F H Page size: 5 -								6 items	in 2 pages

- 4. Update fields to appropriately document completion of the class in which the employee enrolled.
- 5. Click Save.

#### View employee training

Training Classes that each employee is eligible for are listed in the employee screen entitled **Training Employee View**. All eligible classes are listed, with additional information that includes enrollment dates, class schedule dates, location, hour, and enrollment status. You can also click **View** to review the documents and website links for the class.



Previous	Employee	Emplo	yee : Abigail Brown23	▼ <b>€</b> }	Show Concealed: Uiev	v All			Next Employee	Adam Rees3
Talent	Management Certifications & Licenses Trai	ining Employee View							View	Change History
<b>\$</b> /	Add 😂 Delete									
	Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
	T				T	T				
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Enrolled		Edit
	Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
	Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
	Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	Leadership Training For Managers	01/29/2016	02/17/2016 12:00:00 AM	02/17/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
	1 F H Page size: 20 -								5 item	ns in 1 pages

Employees can be enrolled into a class by any user that has access to this screen.

**Note:** You can bypass the enrollment period by enrolling an employee into a class from the Training Employee View screen.

### Training View in the Portal

Once an employee is assigned to a Training Track, he/she may enroll in classes, as well as view enrollment status in the Employee Portal by clicking on the **Talent** navigation tile.



Training					
Training					
Available					
Class Name	Class Description	Enrollment Period	Schedule	Status	
Sexual Harassment Awareness & Prevention	This hands on seminar thoroughly addresses the elements of how to prevent unacceptable behavior. The seminar includes a detailed overview of what sexual harassmett is explains legal definitions, discusses sexual harassment prevention, and shows how to handle sexual harassment complaints and maintain a positive work environment.	1/15/2016 - 1/29/2016	02/03/2016 12:00:00 AM - 02/03/2016 12:00:00 AM	Enrolled	Cancel
Sexual Harassment Awareness & Prevention	This hands on seminar thoroughly addresses the elements of how to prevent unacceptable behavior. The seminar includes a detailed overview of what sexual harassment is, explains legal definitions, discusses sexual harassment prevention, and shows how to handle sexual harassment complaints and maintain a positive work environment.	1/15/2016 - 1/29/2016	02/03/2016 12:00:00 AM - 02/03/2016 12:00:00 AM	Available	Enroll
Workstation Ergonomics	It is important for those who spend long periods of time working with computers to know about workstation ergonomics, also known as DSE. This free online course demonstrates the recommended way to use computer equipment in a safe and healthy way. Given the widespread use of computers at work and beyond, this course is increasingly vital in today's world.	1/1/2016 - 1/31/2016	02/01/2016 12:00:00 AM - 02/29/2016 12:00:00 AM	Available	Enroll
Leadership Training For Managers	Lear how to: Build effective coaching techniques, Master problem analysis and decision-making, Effectively communicate change,	1/1/2016 - 1/29/2016	03/10/2016 12:00:00 AM -	Available	Enroll

## Chapter 6: Company Documents

You can add company documents that all, or selected employees, can review in the Employee Portal as well as on the Advanced HR Home screen. Documents like company handbooks, policies and procedures, and sample forms can be displayed for employee review, and employees can save or print the documents as needed.

Documents are different than Consent Forms in a variety of ways:

- With Onboarding Consent Forms, you can provide documents to new hires during the onboarding process, and require them to electronically sign each document. Documents do not have electronic signature or consent capabilities.
- Documents do not appear in the employee's **Employee Folder** screen. Only Consent Forms appear in this area.
- Documents will appear in the **Company Documents** section of the Employee Portal, while Consent Forms will appear in the **My Documents** section.

The following document categories are supplied by default in Advanced HR:

- Company
- Employment
- Personal

### Adding a Company Document Category

Prior to adding documents, you can create document categories that determine document types.

- 1. Navigate to Setup Default Table Setup I9 Documents List Document Category to create categories for company documents.
- 2. Click Add.

<b>Home</b> > Setup > Default Tables Setu	tup		-Type to Search-
DEFAULT TABLES SETUP NEW HIRE 19 DOCUMENTS	I9 DOCUMENTS > List Document Category		
List A	Name	Description	Codes
List B List C	T		T
DocumentCategory	2015 Annual Reviews	2015 Annual Reviews	Rev2015
COMMUNICATION EEO-JOB	Company	Company	
PERSONAL PROFILE	Employment	Employment	
EMPLOYMENT PROFILE	Personal	Personal	
TALENT MANAGEMENT	H A 1 P Page size: 15 -		

3. Enter the Document Category information.

	* indicates mandatory fields
Name*	
Description/Label :*	
Code :	

- **Name**: Enter document category name (required).
- **Description/Label:** Enter text describing the Document Category (required).



- **Code:** Assign a code to the document category.
- 4. Click Save.

### **Adding Company Documents**

Communications Administra
ALERTS
ANNOUNCEMENTS
LINKS
DOCUMENTS
TEMPLATES
MESSAGES
ACKNOWLEDGEMENTS REPORT

- 1. Navigate to your Advanced HR Admin site. From the Advanced HR Home page, click the **Communications** menu item, click on **Communication Documents**.
- 2. Click **Add** to add a new document. Enter the following information:
  - **Title:** Name or title of the document. This will appear as a hyperlink in the Employee Portal.
  - Document Text: Description of the company document.
  - **Category:** Type of document from the available list of document categories.
  - Show this Document on Home Page: Select this check box to display this document on the Home page in the Company Documents section.
- 3. Click the **Select** button to insert the document.
  - Navigate to the document using the File Upload dialog box.
  - Click on the document and select Open.
  - You can review the document by clicking on the document hyperlink.
- 4. Select the employees that have access to the document by using one of the following option buttons:
  - Select All Employees for everyone to see.
  - Select Select Roles to identify criteria by security role. When Select Roles is selected, a new dialog box, outlining all security roles, will appear. Provide access to as many roles as you want by selecting the check box beside the role(s).
- 5. Click Save.

Company Documen	t	* indicates mandatory field
Title :*	2016 Holiday Schedule	
Document Text :	2016 Holiday Schedule	
Category :*	Company	
Show this Docum	nent on HomePage	
File Upload :*	2016 Holiday Schedule.docx X Remove	
All Employees		
Select Roles		
Save Cancel		

The following is an example of how company documents appear to the employee on the Employee Portal – **Documents – Company Documents** tab.

Evolution® Advanced HR				
<b>1</b>				
				0 Tasks
Documents		_		
My Documents	Company Documents			
Company Documents				
Active				
Document Name	Description	Categor	Date Uploaded	t
2016 Holiday Schedule	List of holidays for 2016.	Company	02/05/2016	
Manager Handbook	Policy handbook for managers.	Company	02/05/2016	

### **Editing Company Documents**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication - Documents**.
- 2. To edit a document, click the document hyperlink on the Company Documents administration screen.

<b>6</b> Home > Communication > Company Docume	Type to Search   Advanced Search My Sav	ed Searches
Add 😫 Delete		
Title	Category	
T	T	
Manager Handbook	Company	
2016 Holiday Calendar	Company	
A A D M Page size: 5 -		2 items in 1 pages

Fitle .*	2016 Holiday Schedule
Document Text :	2016 Holiday Schedule
Category :*	Company
Show this Docum	ent on HomePage
File Upload .*	Select
2016 Holiday Schedu	le.docx X
All Employees	

To remove an exisiting document and upload a new one, click on the **X** next to the hyperlink to remove. Click the **Select** button to insert the document.

- Navigate to the document using the File Upload dialog box.
- Click on the document and select **Open**.

You can review the document by clicking on the document hyperlink.

3. Make edits and click **Save**.



## **Deleting Company Documents**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication – Documents**.
- 2. To delete a document, select the check box next to the document(s) you want to delete.

Home > Communication > Company Documents	-Type to Search-
Add Selete	
Title	Category T
Employee Review Criteria 2015	2015 Annual Reviews
Employee Handbook	Company
A A 1 ► ► Page size: 5 -	

- 3. Click **Delete**. A dialog box will appear to confirm you want to delete the document(s).
- 4. Click Yes.

## **Chapter 7: Communication and Alerts**

Advanced HR can send information to Managers, Administrators, Employees, and other interested parties outside of the company. To do this, Advanced HR uses Alerts, Messages, Templates, and Announcements. In this chapter, you will learn about how to set up these items. In the first section we describe how to set up Templates. This is because other Alerts and Messages may use information from the templates that are set up first.

## Templates

*Templates* are used to create the Word merge-like documents for use in email communications. Templates take information (fields) from the system and combine it with HTML formatted email text. An example of a template could be an offer letter for a job candidate or it could be an alert for a driver's license expiration notice.

### Creating a Template Category

Prior to adding templates, Administrators may want to first define a new template category other than the default template categories of *Candidate Template* or *Letter Template*.

To create categories for company templates:

- 1. Navigate to Setup Default Table Setup Communication Template Category.
- 2. Add Name and Description (required fields) and Code of the new template category.
- 3. Click Save.

DEFAULT TABLES SETUP NEW HIRE	COMMUNICATION > Templ	ate Category	
I9 DOCUMENTS			* indicates mandatory fields!
COMMUNICATION			1
Alert Type	Name*	Driver's License Alert	
Template Category		Driver's License Alert	
EEO-JOB	Description/Label :*		
PERSONAL PROFILE			
EMPLOYMENT PROFILE	Code :		
TALENT MANAGEMENT			1
JOBS AND POSITIONS	Save	Cancel	
MEDICAL			

#### Using templates

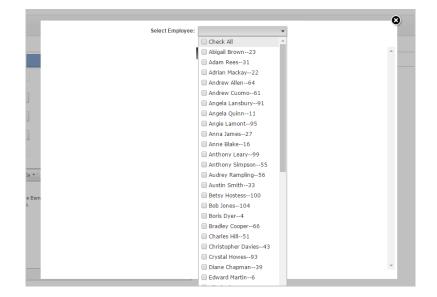
- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication -Templates**.
- 2. Click Add. The following Template categories are supplied by default:
  - Candidate Template (used for onboarding).
  - Letter Template (used for communications).
- 3. Enter **Template Name** (required).
- 4. Select **Category** from the drop-down menu (required).
- 5. Select the different sections available from the category template such as *Personal Information* from the **Select Form** dropdown. The following forms are available to select:
  - Certifications and Licenses
  - Citizenship
  - Dependents



- Emergency Contact
- Employee Certification
- Employee Position
- Employment
- Pay
- Personal Info
- Taxes
- 6. Use the **Fields in Form** drop-down menu to identify the fields to use for this particular template. In our example, we are going to use the **First Name** field in the **Personal Info Form** and the **Original Hire Date** in the **Employment Form**. When you select a field, the system then embeds that field in the **Message** section of the template below, for example [First Name] and [Original Hire Date].

Create a new Tem	plate
Template Name : *	Company Celebration Memo
Category : *	Letter Template 🔻
Select Form :	Employment, PersonalInfo
Fields In Form :	First Name, Original Hire Date
IncludedFields :	[First Name][Original Hire Date]
Message:*	Arial, Verdana ▼     B     I     U     A     *     ●     I </th
	Dear [First Name], Next week marks our Tenth Anniversary! Please meet in the Barn on June 1 for a celebratory reception. You have been working for the Shoppes since [Original Hire Date], when you first joined us. Looking forward to seeing you there. Boris Design    HTML    Preview
Preview Send Save Cancel	

- Add any additional text needed in the **Message** section surrounding the fields you have selected where appropriate for this message.
- You can preview your template by clicking on **Preview.**
- You have the option to send the newly created Template to employees on the fly by clicking on **Send.** This will display a menu with the ability to select individual employees or to **Check All**. Once you have made your selection of recipients, click **Send Mail**. You will receive a confirmation indicating "Mail Sent Successfully!!"



7. Click **Save** to preserve the template.

The Template will now become an option when creating a new Message (**Communication – Messages**). The template message can be edited prior to selecting **Send**.

Create new Messa	je		indicates mandatory fields!
Select Employee : *	<b>v</b>	Select Template :	Company Celebration Memo 🔻
Message : *	Times New R       B       I       I also       Size       A       Or       Image: Size       Image: Siz	,	orking for the
Preview Send Cancel			

8. New templates will be available as a Template Name in **Communication – Alerts** and **Select Template** in **Communication – Messages**.

#### Evolution<sup>®</sup> Advanced HR

## Alerts

You can create email and/or text message alerts or reminders in Advanced HR that are sent out to either a global audience or to a specifically targeted audience using criteria options. Some examples of alerts you could create include the following:

- New Benefits Enrollment
- Open Enrollment End Reminder
- 1<sup>st</sup> year Work Anniversary Reminder
- Employee Termination
- Driver's License Expiration

There are two types of alerts that you can create:

- Event-based alerts these alerts are triggered when a particular field or value you select changes in an employee's record such as a change to an employee's name. Event Based Alerts are delivered as part of the Default Tables setup.
- **Date-based alerts** for example, a work anniversary reminder sent to all managers, triggered based on the calendar date.

### Creating a new alert

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication Alerts**.
- 2. Click Add.
- 3. Enter **Alert Type** (required). See above descriptions of the Alert Types.
- 4. For each type of alert, drop-down menus give the user the ability to refine the alert. Please see the appendix to see an example of an Event Based Alert.
- Check the Acknowledgement Required box, to make employees acknowledge receipt of the alert.
   You may add acknowledgement text to state expectations or add additional information. This will require the employees to acknowledge receipt of the alert when logging into Advanced HR.
- 6. When the required fields are populated, including the alert message to be sent, click **Save**.

#### Advanced HR User Guide – End User



Create a new Alert	lin and a second se	dicates mandatory fields!
Alert Type*	Date Based Alerts	
Title : *		
Template Name :	Select	
Report :	Select	
Message :	Times New R B I U abs Size A - 💩 - 📰 🗮 🗮 🗮 🗮 😫	
	Cesign 🚯 HTML 🤇 Preview	
Acknowledgement Required	d: Acknowledgement Text :	
Document File :	Choose File Save As Draft	
bocument r ne .		
Send To :		
All Employees		
All Managers     Let me Select the Email Alert	t criteria. An employee must have all the selected criteria in order to receive the Email Alert.	
<ul> <li>Select Individuals</li> <li>Email external recipients</li> </ul>		
Include Manager		
Begin Sending Alerts *	By Criteria By Range    Select     Before    Select	t •
Schedule: *	Select	×
How many time should this alert be sent :*		
Send This Alert To :*	Select an Item 👻	
Save Cancel		

If you select an **Event Based Alert Type**, then the following fields become available on the screen:

Create a new Alert		ind
Alert Type*	Event Based Alerts	
Title : *		Field Change Alert :
Template Name :	Select	Status Change Alert :Select All
Report :	Select	New Hire Alert :

• If you want the event based alert to be based on a change in the value of a field, for example, a change to an employee's name, then select the fields the alert is to be based on in the **Field Change Alert** dropdown. The fields are grouped under categories such as *Personal, Taxes, Employment*, etc.



- If you want the event based alert to be based on a change in an employee's status, for example, an employee is going on Military Leave, then select a status in the **Status Change Alert** field.
- Select the **New Hire Alert** check box if this alert should go out to all managers, or all employees for example.
- Select a **Template** if you prefer to use a template to create the message. For example, a date based reminder where the message section is based on a previously created reminder template.
- Use the **Message** section to compose the message of the alert. Use the Word-like formatting button bar at the top of the Message section to help you craft the message.

2			-	-	-	_					 -	-	-	-	-	-
11	'Times New					-				0	-	-	-			0
41	Times New	15	1	<u>u</u>	abe	13	•	A	•	()) = (	-		_	:=	1=	
Ш		_													-	~

You can compose the message or select a mail merge like template to use which combines with an HTML formatted email to produce the notification.

- You can include a document file in the alert by clicking the **Choose File** button and browsing to select a document.
- In the **Send To** section of the screen, you can choose among the following options for sending the alert:
  - All Employees
  - All Managers
  - Let me Select the Email Alert Criteria If you select this option, the screen changes to let you choose criteria for recipients by Job Title or Employment Status.
  - Select Individuals
  - Email external recipients
- When Sending to **All Employees**, select the **Include Manager** check box to also send the alert to that employee's manager.
- Select how to Send this Alert to this will trigger an email alert that can also be configured for text messaging. Select Email, Email and SMS (Short Message Service – Text Only), or SMS (Text Message) only.

#### For Date Based Alerts

If you want to select a Date Based Alert in the **Alert Type** field, you need to specify the date information fields at the lower section of the screen as follows:

Begin Sending Alerts *	By Criteria By Range					
		Select	▼ Before	•	Select	-
Schedule: *	Select 🔹	1				
How many time should this alert be sent :*						
Send This Alert To :*	Select an Item 👻	1				

- You can **Begin Sending Alerts** by **Criteria** or by a date **Range**. If you select **By Range**, the screen changes to display a **From Date** & **To Date** calendar fields.
- You select the Schedule such as a One Time, Daily, Weekly, Monthly, etc.
- Enter how many times to send the alert.
- For example, the following shows a date-based 1<sup>st</sup> Work anniversary alert to be sent 7 days before an employee's anniversary date comes up so that they will get a notification reminder.

#### Advanced HR User Guide – End User



Begin Sending Alerts *	🖲 By Criteria 🔍 By Ra	ange		
	7	Days	▼ Before	▼ Hire Date
Schedule: *	Daily	•		
How many time should this alert be sent :*	7			
Send This Alert To :*	Email+SMS	•		

The alerts will be automatically sent when the Date based item or Event based item occurs, or alerts can be run manually, see the following section.

#### Example of an Alert

The following is an example of an event based alert (employee reaching 30 days of service) showing how it appears to the Send To receipient on their Home page, in the **Alerts and Notifications** section.

Alerts And Notifications				
Subject	Description	Received On	Status	Delete
T	T		T	
V Task::Service Alert				
<ul> <li>Event::Service Alert</li> </ul>				
Jatin Mali	Employee has reached 30 days of Service	7/04/2016	1	×
Yasir Izanagi	Employee has reached 30 days of Service	6/25/2016	1	×
H I I H Page size: 20 V				2 items in 1 pages

**Note:** Currently, you cannot select the 'Birthdate' value for a birthday alert – that is the actual full date of birth including the year, which of course is in the past. Also traditional 'Anniversary' alerts are not currently supported (unless you create one such as 1 year after the hire date, 2 years after the hire date, etc.). A new Anniversary of Birthday option will be added in a future release.

### Manually running Alerts

Administrators can manually run alerts at any time by going to **Communication – Alerts**, checking the box of the alert(s) you would like to run, and clicking the **Manually Run Alert Service** link.

bba 🛟	🗱 Delete				
	Title	Alert Type	Schedule	Draft	Resend
	T	T	T		
	New Hire Alert	Event Based Alerts		No	
	BIRTH DATE TEST WITH MANUAL RUN	Date Based Alerts	Yearly	No	2
	On Hire Date	Date Based Alerts	One Time	No	۵
	On Driver License Expire	Date Based Alerts	One Time	No	۵
	On Day Before Driver Expire	Date Based Alerts	One Time	No	٩

**Note:** Date Based Alerts only can also be resent from this screen by clicking on the envelope icon next to the alert in the **Resend** column. Event Based Alerts cannot be resent.

The system will run the alert as per the selected criteria, for example – an email alert to all employees that a new employee has joined the company.



### **Editing Alerts**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication -Alerts**.
- 2. To Edit an existing alert, click on the desired alert, make any changes, and click Save.

### **Deleting Alerts**

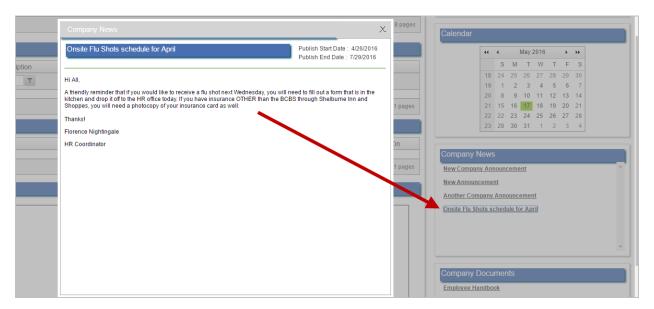
To remove an existing alert, check the box of the alert(s) you want to remove and click the **Delete** button.

Manually Run Alert Service								
n 🖗 🕼	add 😫 Delete							
	Title	Alert Type	Schedule	IsDraft	Resend			
	T	T	T					
	New Hire Alert	Event Based Alerts		No	<i></i>			
	Employee Termination Alert	Event Based Alerts		No	<b>\$</b>			
	Certification Expiration Alert	Date Based Alert	Weekly	No	æ			
	New Policy Alert	Event Based Alerts		No	<i></i>			
	Birthday Alert	Date Based Alert	One Time	No	æ			
	Open Enrollment Alert	Date Based Alert	Daily	No	<i></i>			
	▶ Page size: 15 ▼				6 items in 1 pa	ges		

### Announcements

Announcements in Advanced HR are configured to appear on the Advanced HR Home page (in the **Company News** section) during a specified time range.

Users click on the announcement link and can view a popup display of the details of the announcement.



#### **Creating Announcements**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication Announcements**.
- 2. Click Add.

Create a New Company Announcement						
Title: *						
Message: Times New R B Z U dat Size A · Or F F F F H E H ®.						
Design ♦ HTML ♀ Preview						
Publish Start Date : *   Publish End Date : *   Save As Draft  Save Cancel						

Enter a Title for the announcement (required).
 The title of the announcement will appear in the Company News section of the Home page.

Compose the text of the announcement in the **Message** section of the screen. Use the **Design** tab of the **Message** section of the screen to craft your announcement. It provides a Word-like interface collection of tools to make creation of the announcement easier; use the Bold, Italic, Underline, Fonts, and Layout buttons to create your announcement.

Click the **HTML** button to make the announcement text HTML ready.

Click the **Preview** button to see how the announcement will appear before you save it.

- 4. Enter the message.
- 5. Enter the **Publish Start Date** and **Publish End Date** (required). This is the date range that you want the announcement to appear on the **Company News** section on the Home page. You can click the Calendar icon to select a date or enter the date in the field.
- 6. Click Save.

Select the **Save as Draft** option if you need to close the window but want to keep working on it without it being published.

The System returns you to the **Company Announcements** screen; the announcement you just created appears on the screen, along with any other announcements that have been created, in advance of their publish date.

💠 Add 😂 Delete			
Title	Author	Publish StartDate	Publish EndDate
T	T		
Elu Shots - November 15	mikeblake	10/23/2015	11/15/2015
H I H Page size: 10 V			

#### Announcements appear on the Home Page

Starting on the date that you entered in the **Publish Start Date** field, the title of the announcement that you created will display in the **Company News** section of the Home page (until the Publish End Date). An example is shown to the right.

All users can then simply click on the title of the announcement in the **Company News** section of the Home page to view a popup screen of the detail text of the announcement, an example is shown below.

Company News	X				
Flu Shots - November 15	Publish Start Date : 2/8/2016 Publish End Date : 3/1/2016				
Get ready for Winter at the Company Flu Shot Clinic on November 15 in the company break room.					



Note that Announcements (& Links) do not get pushed out to the Portal as Alerts do.

### **Editing Announcements**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication – Announcements**.
- 2. Click on the hyperlink of the announcement that you want to edit.
- 3. Enter edits.
- 4. Click Save.

#### **Deleting Announcements**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication Announcements**.
- 2. To delete a document, select the check box next to the announcements(s) you want to delete.

🖒 <u>Home</u> > C	ommunication > Company Announcement	ts		-Type to Search-	•	Advanced Search	My Saved Searches
🗘 Add	Selete						
	Title	Author		Publish StartDate		Publish EndDate	
	T		T				
	Onsite Flu Shots - November 30th	Nicole		11/01/2015		11/30/2015	
I4 4 1	▶ ▶ Page size: 10 ▼						

- 3. Click **Delete**. A dialog box will appear to confirm you would like to delete the announcement(s).
- 4. Click Yes.

## Links

Another feature available from the **Communications** menu in Advanced HR is the **Links** item, which lets you place a clickable link on the Advanced HR Home page – links are shortcuts for URLs – the global address of websites, documents, and other resources on the World Wide Web that would be handy for users.

Employees Payroll Communications Expenses Administration Reporting Utilities	s   emp					
C Here				-Type to Search-	Advenued Easth By Errord East-bea	
Quick List					Image	
Name	Job Tibe		Position			
T	T		T			
Ariget Brown	Total A		L18			
Adam Box	Holanet Meaper					
Advian Washay	NA					
Andrew Alter Andrew Guoree	020					
Angele Landsony	Server					
Angels Colors	NA					
Angie Lamont	Support					
Anna James	010					Edit Image
Anna Blate	Pangitan					
H E 1 2 3 4 5 6 7 8 3 K Papeline 10 *				74 farm in 8 pages	Calendar	_
Aleris And Noblezbons					H 4 May 2015 > 16	
					9 K May 2019 9 He	
Subject	Description	Received On	Status	Delete	1 × 2 × 2 × 2 × 3	
Y.	¥.		T		10 1 2 3 4 5 6 7	
H 6 7 9 H Page site 20 V		No Data Available		O darro in 1 pages	20 8 9 10 11 12 13 14 21 15 18 18 18 19 20 21	
					2 2 5 6 6 7 5 F	
Workflows					20 20 30 31 1 2 3 4	
Weikflow Initiated By		Employee Name		Initiated On		
		No Data Analiabite			Company News	
H 6 1 B B Parise to V				0 farts in 1 pagas	New Company Announcement	-
Charls					New Announcement Another Company Announcement	
					Onaite File Shote echadule for April	
Employee Status		Role Summary				
Active Terranuted		Administrati	or and a second s			
bernhuted		- vanaper				-
		Supervisor Trainer	ages.			
				•	Company Documents	
74					Engineers the first	
					Engingen Renner Others 2015	
					Holiday Schedular New York	
					2019 Review Ontenta for Payroll	
					Another Document 2015 Engineers Handbook	
					201 Crucium Hendbook	
Applicants Status		Denefit Summary			2015 Holiday Schebula	
New Hirr Infraction			-		Hardbook	
Foglobared		Ches Com Spart	n Sette Ad		Securi Intropret Policy	
				2	Units	
					Norman Capital Management	
					Cigns Hothors Provide Deutory	
		,			la ser de	
					Reports	
					Inde	
					Bithday	
					II Washing Line	
		ú 2016 d	lystern LLC. All rights reserved. Western 1.120010			Evolutio

Users can click on a link in the Links section of the Home page,

Links	
Human Capital Management	
Cigna Healthcare Provider Directory	]
	-

and can view the destination URL.

C https://ifphcpdir.cigna.com/web/public/ifpproviders	5							
P	ersonal   Ba	siness (	Health Care Pro	ofessionals (	International	About Cigna	Careers	Contact Us 🔤 •
4	Cign	۵.				Legin la myCigna Piral a Declor/Dentist	Search	٩
	orne = Choo	ne a Direc	tory + Find a Do	octor, Dentist o	r Pacility for individuals & Parnilles			
	FIND & DOCTOR, DENTIST OR FACILITY FOR INDIVIDUALS & FAMILIES The antere electron and envices listed in the Cipes density and real repeated induces and distances for part data. Find a							
	â ooc	TORS	💏 DENTIST	<b>П</b> ноям	ITAL, PHARMACY OR FACILITY			
	Dates, Use my c	тх		Pick	T A PLAN: Plan selection required	LOOKING FOR: (Name, keyword, etc.)	SEARCH	



### **Adding Links**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication Links**.
- 2. Click Add.
- 3. Enter **Name** (required).
- 4. Enter **URL** (required). Example: http://www.abcd.com
- 5. Click Save.

Create a New Link	(	
Name : *		
URL : *		(http://www.abod.com)
Save Cancel	·	

### Editing Links

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication Links**.
- 2. Click on the hyperlink of the link that you want to edit.

Ċ	Home > Communication >	Links		-Type to Search-	•	Advanced Search	My Saved Searches
	Add 😫 Delete	Name	URL				
		Cigna Healthcare Provider Directory	https://fphcpdir.cigna.com/web/public/ifpprovider				
		je size: 15 💌					

3. Click Save.

### **Deleting Links**

- 1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication Links**.
- 2. To delete a link, select check box next to the announcements(s) you want to delete.

Communic	cation > Links		-Type to Search-	•	Advanced Search	My Saved Searches
🕂 Add 🗱 D	Delete	URL				
	Clana Healthcare Provider Directory     https://fiphicpdir.clana.com/web/public/fipprovider       H     1     H       Page size: 15     -					

- 3. Click **Delete**. A dialog box will appear to confirm you want to delete the links(s).
- 4. Click Yes.

### Messages

You can use messages to create and send information within the company. Administrators and managers can send a message to a single individual of the company, or to multiple employees or groups of employees. You have the same set of templates available to help compose the message as with alerts and announcements. Messages will be received at the work email address in the employee record. The message will also appear as a PDF file labeled with the employee number in the employee folder and date stamped.

### **Creating Messages**

1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication** – **Messages**.

Create new Messa	ge			1	indicates mandatory fields!
Select Employee : *		•	Select Template :	Select	•
Message : *	Times New R B I	U abs Size A • 💩 •			
	🥕 Design 🚯 HTML	🔍 Preview	±.		
Preview Send Cancel					

- 2. Select the recipient(s) of your message from the **Select Employee** drop-down menu (required). You can select as many employees as you want by clicking the check box to the left of their name.
- 3. If you choose to use one, **Select Template**.
- 4. Enter the content of your Message. You can enter the message text in the **Design** tab or, select an existing template from the **Select Template** dropdown to automatically populate the text and format it.
- 5. You have the options to **Preview**, **Send**, and **Cancel** your message. When you have finished composing your message, click on the **Save** hyperlink.
- 6. You will receive a confirmation that your "Mail has been successfully sent."

The designated recipient(s) then receives the message. Here is an example of a message as received by the recipient.

	🕰 Reply 👰	Reply All 😋 Forward 🦙 IM
Q Reply Q Reply All Q Forward C M Thu 1029/2015 328 PM Mike's Company DO NOT MODIFY <advancedhr@evolutio blake<="" message="" mike="" template="" th="" to=""><th>Thu 10/29/2015 3:28 PM</th></advancedhr@evolutio>	Thu 10/29/2015 3:28 PM	
		Mike's Company DO NOT MODIFY <advancedhr@evolutionhcm.com></advancedhr@evolutionhcm.com>
		Message Template
	To 📕 Mike Blake	2
	Mike can ye	ou please run the payroll register report.

Any message created in this area, will be automatically filed in the Employee Folder in the HR Dashboard. For example, an Administrator that wants to be sure that her email correspondence is part of the permanent folder, could send the email from here, rather than from Outlook.

Note: The employee recipient or a Super Administrator can delete messages from the Employee Folder.



### **Deleting Messages**

The employee recipient or a Super Administrator can delete messages from the Employee Folder.

- 1. Navigate to Employees Employee Folder.
- 2. Place a check in the box to select the message(s) you want to remove.
- 3. Click Delete.

🛟 Add	Delete					
	Document Name	Consent By	Consent Date	Category	Attachment	Shared
		Ţ		T	T	
	voided check	Abigail Brown	1/27/2016	Direct Deposit	voided check.png	Unshared
	citrix cert.png	Abigail Brown	1/25/2016	CertificationAndLicense	citrix cert.png	Shared
	Message23	Abigail Brown	2/3/2016	Message Template	23.pdf	Unshared
H A	1 ▶ ▶ Page size: 5 ▼					3 items in 1 pages

4. You will be prompted with a message "Are you sure you want to delet the selected item(s)?. Click on **Yes**.

## Chapter 8: Requisitions & Applicant Tracking

Evolution Advanced HR contains an Applicant Tracking System (ATS) that enables companies to perform recruitment needs in-house, from handling job postings, applicants and resumes to scheduling interviews. The ATS serves as the hub for a company's recruitment efforts and helps to facilitate the overall management of human capital.

There are certain profile setups that are required prior to creating your first job requisition. This document will outline the steps to enable ATS functionality for your company.

**Note:** If you plan to use Recruiting and Applicant Tracking in Evolution Advanced HR, you must enable Position Management. Job Requisitions and Recruiting Profiles directly tie into Positions in Evolution Advanced HR. Please refer to the chapter on **Position Setup** for more information on enabling positions.

### Position Management

To create a Position in Evolution Advanced HR, there are some mandatory fields that are contingent upon the setup of specific profiles. These prerequisites actually help satisfy some of the setup for requisitions.

All **Positions** require the following:

- Position Title
- Job Profile
- Recruiting Profile ID
- Security Role

#### Job Profile

Job Profiles consist of a Job Title and Job Description (required), along with Job Duties, Qualifications and Physical, Mental and Environmental Conditions associated with a job. Job Profiles may be set up in Administration – Job Profiles – List Job Profiles.

#### **Recruiting Profile**

The Recruiting Profile ID is created as a result of entering the **Recruiting Title** (required) when creating a Recruiting Profile. The other mandatory field is the **Description** of the Recruiting Title. It is here that you can add all of your recruiting questions and documents associated with recruitment for a particular position. Recruiting Profiles may be set up in **Administration – Positions – Recruiting Profiles**. Recruiting Profile has one default table value set-up.

Name	System Setup Location	Existing Values	Ability to add values	Display Location
Question Type	Setup – Default Tables Setup – Jobs and Positions – Question Types	None	Yes	Administration – Position – Recruiting Questions Question Type dropdown.

Please refer to the Position Setup chapter for more information on setting up these above mentioned profiles.

### Requisitions

Another benefit of using Evolution Advanced HR's ATS is that it aims to make requisition management a paperless process, as well as a templated one. Predefined qualifications, job responsibilities, requisitions and recruiting profiles turn into an online repository that can easily be modified to create new positions and requisitions.

#### Default Table values and dependency set up

Prior to using the requisition and applicant tracking functionality, Administrators must perform some default table setup. This setup is explained in the *Advanced HR User Guide – Service Bureau* version.

### **Requisition Check List**

ADMIN

Discussion

Category N

Participant

Discussion

Invitation L

Condition

Action

Chat

ties Setup

COMPANY SETUP

Manage Passwords

Assign Org Chart Fields

Recruiting Configuration

Requisition Check List Item Generate External WebSite

Requisition Check List Name

Add User Fields

Pick List

Link

RECRUITING

SECURITY

Manage Roles

Assian Roles

Advanced HR provides the opportunity to create checklists to help facilitate and satisfy internal processes and protocols. To create a requisition checklist:

- 1. Go to Setup Requisition Check List Name.
- 2. Enter the Requisition Check List Name.
- HIPAA 834 EMPLOYE 3. Click Save.

4.

- Go to Setup Requisition Check List Item.
- 5. Click **Add** to add an item to the checklist.
- 6. Select Check List Name from the dropdown menu (required).
- 7. Enter the **Check List Item** Required).
- 8. Select the **Status** of the Check List Item from the dropdown menu (required).
- 9. Enter **Comments** into the text box.
- 10. Add additional Check List items as needed.
- 11. Click Save.

Check Li	Check List Item						
🛟 Add							
	Check List Items	Check List Name	Status	Action			
	Background Check Verified	Standard Req Checklist	InComplete	-			
	Request candidate references	Standard Req Checklist	InComplete	•			
	Remove Job Posting	Standard Req Checklist	InComplete	-			
	Candidate References Verified	Standard Req Checklist	InComplete	-			
<b>I</b>	Page size: 5 -			4 items in 1 pages			

Check list items will now be associated with the Requisition Checklist Name and can be assigned in the Job Requisition Info screen found in **Administration – Job Requisitions – Job Requisition Dashboard** by clicking on the hyperlink to the Job Requisition Name.

C Home > Administration > Job Requisitions > Job	Requisition Dashboard		-Type to Search-	•	Advanced Search	My Saved Searche
Network Administrator I						
Requisition Info						
Position .*	Information Systems	Requisition :*	Network Administrator I	Category :	IT	×
Employment Type :	Full Time	Hiring Manager :*	Nyota Uhura			
City:*	Milky	State :*	WA	Budget:	Network Administrator I	-
Budgeted Positions :		Relocation Budget(if any):	\$0	Valid From :*	2/10/2016	
Number of Openings :	1	Positions Filled :	0	Valid To :*	3/11/2016	
Budget FTE :*	1	Status .*	Open 💌	Date Opened :	2/10/2016	
Name of Employee Replaced(if any) :	Select 🔻	Salary Range :	\$65,000 To \$80,000	Date Closed :		
Reason Closed :		Requisition Check List Name :	<b>•</b>	Interviewers :*	Harry Mudd, Jim Kirk	*
Recruiting Cost:	\$1,200	Recruiter :*	Select Exec Req Checklist Standard Req Checklist			

## Creating a Requisition

Once you have the positions for your company created, including the ones for which you will be hiring, you are ready to create a requisition.

1. Log in with the Administrator role and navigate to Administration – Job Requisitions.

Employees Payroll Communication	Administration Reporting			
	JOB REQUISITIONS	JOB		
C Home	Candidate Database	Job D		
		lob C		

- 2. The system navigates you to the Job Requisition Dashboard. Click Add.
- 3. Enter the **Requisition Information**:

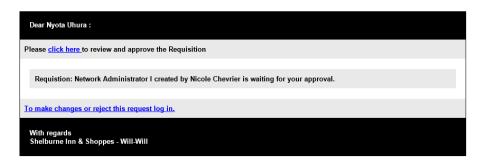
Note: Consult above the setup table if you encounter any missing values while creating your requisition.

- Position: Position for which the requisition is being created (required).
- **Employment Type**: Employment Type of the requisition being created.
- **City**: City in which the position for the requisition is located (required).
- **Budgeted Positions**: Available positions budgeted for the requisition.
- Number of Openings: Available openings for the position.
- **Budget FTE**: Budgeted Full Time Equivalent (required).
- Name of Employee Replaced (if any): Select from dropdown of all available employees (if applicable).
- **Reason Closed**: Record the reason for closing the requisition.
- **Recruiting Cost**: Record the recruiting cost associated with the requisition.
- **Requisition**: Name of the requisition.
- **Hiring Manager**: This field will be auto-populated via Position Management. The Hiring Manager is the Manager of the position for which the requisition is being created (required).
- **State**: State in which the position for the requisition is located (required).
- Relocation Budget (if any): Allotted relocation budget.
- **Positions Filled**: Number of positions filled.
- Status: Select from dropdown the status of the requisition (required).
- Salary Range: Low dollar amount followed by highest amount that constitutes the salary range for the position.
- **Requisition Checklist Name**: Select from the dropdown of any Requisition Check Lists that have been created (refer to the *Requisition Checklist* section of this document).
- **Recruiter**: Select an employee from the dropdown to enter the recruiter for the position (required).
- **Category**: Select the Category in the dropdown from the Requisition Category values that you may have created.
- **Budget**: Select the Budget in the dropdown that you may have created in the Budget Profile.
- Valid From: Select the start date of the period for which the requisition will be valid (required).
- Valid To: Select the end date of the period for which the requisition will be valid.
- **Date Opened**: Select the Date that the requisition opened.

- Date Closed: Select the Date that the requisition closed.
- Interviewers: Select an employee(s) from the dropdown to enter the interviewer(s) for the position (required).
- Text Box: This box is auto populated with the Name of the Position and the associated Job Profile.
- Attachment: Choose File to upload supporting documentation that will accompany the requisition.
- **Post Date**: Select the day that the requisition will be posted.
- 4. Click Save.

Requisition Info							
Position .*	Information Systems	Requisition :*	Network Administrator I	Category :	TI	٣	
Employment Type :	Full Time	Hiring Manager :*	Nyota Uhura				
City :*	Milky	State :*	WA	Budget :	Network Administrator I	*	
Budgeted Positions :	1	Relocation Budget(if any) :	\$0	Valid From :*	2/10/2016		
Number of Openings :	1	Positions Filled :	0	Valid To :*	3/11/2016		
Budget FTE :*	1	Status .*	Open 💌	Date Opened :	2/10/2016		
Name of Employee Replaced(if any) :	Select	Salary Range :	\$65,000 To \$80,000	Date Closed :			
Reason Closed :		Requisition Check List Name :	Select	Interviewers :*	Harry Mudd, Jim Kirk		
Recruiting Cost:	\$1,200	Recruiter :*	Montgomery Scott				
Times New							
Documents							
Attachment: Choose File			Post Date:* 2/10/2016				
			Requisition status:				
		Save	Approval to post pending Post Cancel				

Upon clicking Save, an email is sent to the Hiring Manager to approve the requisition.



The Requisition Status now appears as: Approval to post pending.

## **Recruiting Configuration**

Evolution Advanced HR provides HR Administrators and Recruiters the opportunity to customize messaging to applicants as well as the ability to manage notifications sent involving recruiting team members. To configure recruiting:

- 1. Go to Setup Recruiting Configuration.
- 2. Enter Recruiting Configuration information:

	Recruiting Configuration	
	Below are the options available for configuring the communications.Edit the options you would like and press the "Save" button.	
Title:*	Standard Recruiting Package	atus
Description:*	Standard Recruiting Package	
	✓ Notify recruiter when new candidate apply.	
	Notify hiring manager when a candidate is associated with thier open position.	

- **Title**: Title of the Recruiting Configuration setup.
- **Description**: Description of the Recruiting Configuration setup.
- Notify recruiter when new candidates apply: Check the box to enable email notifications to the recruiter when new candidates apply.
- Notify hiring manager when a candidate is associated with their open position: Check the box to enable email notifications to the hiring manager when a candidate is associated with their open position.
- Active Status: Check this box, when you have completed your Recruiting Configuration, to make it active in Advanced HR.
- 3. Enter Introduction (first page) content:

Introduction (first page) content	
Enter the instructions that you wish to see displayed on the job requisition screen.	
If you enter no instructions in this box, then the default instructions will be displayed on the job requisition screen.	
Arial, Verdana • B I U abs 1 • A • 💩 • 🗐 🚝 🚍 🚍 🚍 🖂	
Thank you for your interest in in joining our team! We look forward to reviewing your application.	
Sincerely,	
The Team at Will's Farm	•
Contraction Contra	

- Enter the instructions that you wish to see displayed on the job requisition screen.
- 4. Enter Review & Submit (last page) content:

Arial, Verdana	BI	U abe 1	• A • 🗞 •	EEE	🛛 🗄 🗮 😣	
ank you for taking	g the time t	o submit your a	application.			
ncerely,						
e Talent Acquisiti	on Team					

- Enter the message that you wish to see displayed on the last screen of the application process.
- 5. Enter **Resume receipt email content**:

Resume receipt email content
Subject Thank you for submitting your appl
Arial, Verdana • B I U abe 1 • A • ③ • ] ☶ ☶ ☶ ☷ ☷ ☷ ☷ ☷
We appreciate your interest in becoming a member of our team. If your qualifications are a good match, we will contact you within the next two weeks to discuss next steps.
Enjoy your day!
The Talent Acquisition Team
🖌 Design 🚯 HTML 🔍 Preview

- Enter the Subject line and email notification message that you would like the applicant to receive upon submission of their application.
- 6. Enter **Resume rejection email content**:

Resume rejection email content
Subject:Thank you for your interest in Wills
Arial, Verdana ▼ B I 및 abs 1 ▼ A ▼ ③ ▼ ] 王 王 王 王 王 王 王
We appreciate your interest in becoming a member of our team. At this time, your qualifications are not a perfect match with the position for which you applied. Please keep us in mind for future opportunities at our organization.
Enjoy your day!
The Talent Acquisition Team
Contraction Design Contraction Preview

- Enter the Subject line and email notification message that you would like the applicant to receive upon rejection of their application.
- 7. Enter the Introductory Content for Self Hire:

Introductory Co	ontent	for Se	elfHire											
'Times New 🔻	BI	<u>U</u> ab	e Size	A - ₹	» •  ]	EE	38	:= 1	8					
Congratulations on be in a seamless manner		part of th	e team! F	Please take	e the tin	ne to com	plete the f	ollowing	locumentation onlin	e. This pr	ocess serve	es to onboa	rd you as an	employee
We look for ward to s	eeing you	i on your	first day.											
Sincerely,														
Human Resources.														
🧨 Design 🔇 🛠	HTML	Q Pr	eview											
Save&Close	Save	Ca	ancel											

- Enter the message that you would like the candidate to see on the self hire screen.
- 8. If you have completed entering your information, click the **Active Status** in the Recruiting Configuration section.
- 9. Click Save & Close.

Click **Save** often during the setup to prevent losing any content while completing the recruiting configuration.



## Approving and posting a requisition

1. The Hiring Manager receives the email notification, and clicks on the "click here" hyperlink to review the details of the requisition.

Network Administrator I							
Position :	Information Systems	Requisition :	Network Administrator I	Category:	π		
Employment Type :	Full Time	Hiring Manager :	Nyota Uhura	Budget :	Network Administrator I		
City :	Milky	State :	WA	Valid From :	02/10/2016		
Budgeted Positions	1	Relocation Budget(if any):	\$0.00	Valid To :	03/11/2016		
Number of Openings:	1	Positions Filled :	0	Date Opened :	02/10/2016		
BudgetFTE :	1	Status :	Open	Date Closed :			
Name of Employee Replaced(if any) :		Salary Range:	\$65,000.00-\$80,000.00	Interviewers :	Harry Mudd ,Jim Kirk		
Reason Closed :		Requisition Check List Name :	1		_		
Recruiting Cost:	\$1,200.00	Recruiter :	Montgomery Scott				
Position Information Systems							
Job Profile : Network Administrator I Responsible for designing, organizing, modifying, installing, and supporting a company's computer systems. Designs and installs LANs, WANs, Internet and intranet systems, and network segments.							
Job Duties : Install and support LANs, WANs, network segments, Internet, and intranet systems. Administer servers, desktop computers, printers, routers, switches, firewalls, phones, personal digital assistants, smartphones, software deployment, security updates and patches. Assign configuration of authentication and authorization of directory services. Facilitates communication between staff, management, vendors, and other technology resources within the organization. Provides strategic and tactical planning, development, evaluation, and coordination of the information and technology systems for the health care network. Responsible for the management of multiple information and communications systems and projects, including voice, data, imaging, and office automation.							
Qualifications : Network Performance Tuning, LAN Knowledge, Network Design and Implementation, Problem Solving, Strategic Planning, Multi-tasking, Quality Focus, Coordination, Technical Understanding, Quick Study, Technical Zeal							
Documents							
Attachment : none							
C	comments						
-		Approve Reject					

2. The Hiring Manager clicks **Approve** to approve the Requisition or **Reject** to reject the requisition and can add a message in the **Comments** text box.

comments	Want to get some candidates on a fast track for this.	
	A	** This requisition has been approved **

After clicking **Approve**, a message indicates **"\*\*This requisition has been approved\*\*"**. An email notification is sent to the Administrator that the requisition has been approved. An email notification is also sent to the Recruiter that the requisition has been approved.

3. The Recruiter opens the requisition in the Job Requisition Dashboard (Administration – Job Requisitions – Job Requisition Dashboard) and clicks Post to post the requisition.

: Post Date:* 2/10/2016	
Hiring Manager comments:	
Want to get some candidates on a fast track for this.	
Requisition status:	
Approved by hiring manager on 2/11/2016	
Save Post Cancel	

After clicking **Post**, an email notification is sent to the Hiring Manager that the requisition has been posted. An email notification is also sent to the Recruiter that the requisition has been approved.

4. The Recruiter navigates to **Setup – Generate External Website Link** to generate the External Web Link to the online applicant portal.

COMPANY SETUP	HIPAA 834 STANDARD	DEFAULT TABLES SETUP
SECURITY	EMPLOYEE PORTAL	COMPENSATION
Manage Roles	ADMIN	MANAGEMENT
Assign Roles	Discussion Category	Action Type
Manage Passwords	Category Master	Pool Basis
CUSTOMIZATION	Participant Rights	Mailing Template
Add User Fields	DiscussionType	Exception Log
Assign Org Chart Fields	Invitation Level	WorkflowNotifications Log
Pick List	Action	Certification Master
RECRUITING	Condition	Configure Onboarding
Recruiting Configuration	Chat	Configure Taxes
Requisition Check List		
Name		
Requisition Check List Item		
Generate External WebSite		
Link		

This URL may then be posted on external job boards or an internal careers site to provide interested parties the ability to apply and submit their resumes online.

	External WebSite Link
Copy the UR	L below and paste it in the address bar of your browser.
	ass.demoevolutionportal.com/hr/ExternalWebSite/ExternalHome.aspx? :CMQzm7IOP38=
	Close

**Important:** Once posted, a requisition cannot be edited.

## Online application process

1. The applicant selects the Requisition Title of the Job/Position title Open Position to view the job description and related attachments via the online applicant portal.



- The applicant can close out of the requisition by clicking on the X and to print the requisition by clicking on the printer icon.
- 2. The applicant closes out of the requisition review to the applicant portal, registers (as a first time user) or as a registered user, logs in by clicking on the appropriate button.



	Find a job y	ou like? Register or L	.og in to apply too
the Requisition Title to read the job descrip	tion, then click the Register or Log In link (a	above) to apply.	
Requisition Title	Job/Position Title	Location	Post Date
Network Administrator I	Information Systems	Milky,WA	02/10/2016
I			1 items in 1 pages

3. The Applicant completes the registration/logs in.

Already registered? Log in here.				Back to home page
Email Address		Password		
Log In Forgot Password	<u>1</u> 🔏		Your password length should be betw	veen 6 to 10 characters.
New applicant? Register here.				
All fields marked with a * are required Name	l.			
*First Name	Middle Name		*Last Name	]
Address				-
*Street	*City		* Country Select	*State Select
Additional Information *Email Address	*Confirm Email Address		*Phone Number	*Zip Code
Create Password *Password	*Confirm Password			
Your password length should be bet Register Cancel	ween 6 to 10 characters.			

- 4. The Applicant selects the Requisition Title to apply for the indicated Job/Position Title and clicks **Apply**. The applicant will be taken through the Recruiting Configuration screens, completes the application questions and uploads resume and any additional documents such as a cover letter.
- 5. The applicant clicks the **Sign button** to attest the application.
- 6. The applicant clicks the **Submit** button receives a "Thank you for applying" screen in the applicant portal.

Welcome:
Nicole Chevrier
Thank You!
Thank you for your interest. Your resume has been received and will be reviewed. Should we determine a match between your background and our staffing requirements, we will contact you.
What would you like to do next?
Apply for another job
View jobs that you have applied for

The applicant receives an email acknowledging receipt of their application to the requisition.

De	ear Nicole Chevrier :
	Requisition Title : Network Administrator I
	We appreciate your interest in becoming a member of our team. If your qualifications are a good match, we will contact you within the next two weeks to discuss next steps.
	Enjoy your day!
	The Talent Acquisition Team

An email notification is sent to the recruiter that an applicant has applied for the position. An email notification is also sent to the hiring manager that an applicant has applied for the position.

Dear	Nyota Uhura :
	new Applicant named Nicole Chevrier has applied for the following job requisition Network Administrator I on /12/2016 3:22:13 PM

#### Administration of applicants to posted requisitions

1. The recruiter navigates to the Administration – Job Requisitions – Job Requisition Dashboard. This view allows the recruiter to see all of their requisitions and a total of the applicants for each. The recruiter will also receive notification of a new applicant(s) via a task in the Employee Portal.

S.No Title	Hiring Manager	Applicants	Candidates	Status	Action	
1 Network Administrator I	Nyota Uhura	2	<u>0</u>	Open 👻	-	
I4 4 1 ▶ ▶ Page size: 5 ▼						1 items in 1 pages
Groups Discussions	5				Hollo	Montgomony
Groups Discussions	5					Montgomery
Groups Discussions	5					Montgomery
Groups Discussions	5			Tas		
Groups Discussions		riend Activities			2 Tasks	

2. The recruiter clicks on the hyperlink of the Requisition title to review the applicants. Applicants that have satisfied any knock-out value criteria are listed in red.

iring Manager : 🛛 🖥				Check List Items				Offer Letter	Details		Note		
alid From : 2	4yota Uhura Dpen 910/2016 911/2016			None		Candidate Nan	ne	Status No Data Ava	Candidate Offer Status illable				
				Applicants/Candida	tes					Interviews			
ime <u>Chevrier, Nicole</u> <u>Covington, Blair</u>		Click to Hire × ×	Type Applicant Applicant	Job Qualifications Quick view Quick view	CreatedOn 02/12/2016 02/12/2016	Job Score	Status New Applicant New Applicant	Action	Interviewer Name	Candidate Name No Data Available	Interview Int Date Tir	erview Stat ne	tus Feedba

• Click on the **Quick View** button to view a side-by-side comparison of the job qualifications and the experience and skill set the applicant supplied in the application.



Subject Area         Description         Mandatory         Proticiency         Years         Subject Area         Description           Network         Performance         Tuning, LAN         Director of Business Services, Vermont Design Works         Employment         Director of Arts, University of Oregon 09/20/2006 to         5/20/2012 to 20/2015           Multi-tasking, Object Area         Description         Bachelor of Arts, University of Oregon 09/20/2006 to         5/20/2010         Skills :           Calibit Focus, Technical         Technical         Understanding, Ouck Study, Technical 2eal         0.00         Skills :		Job Qu	alifications		Applicant/Candidate Qualifications
	Subject Area	Network Performance Tuning, LAN Knowledge, Network Design and Implementation, Problem Solving, Strategic Planning, Multi-tasking, Courdination, Technical Understanding, Quick Study,		Proficiency	Employment Director of Business Services, Vermont Design Works 10/30/2012 to 03/30/2015 Education - Bischelor of Arts, University of Oregon 09/20/2006 to 05/20/2010

**Note:** The employee in the role of recruiter is the only person who is able to convert an applicant to a candidate or reject an applicant.

3. The recruiter clicks on the hyperlink of the applicant's name, to further review the applicant's submission.

Alert	s And Notifications				
	Subject	Description	Received On	Status	Delete
	T	T		T	
~	Task::Jobs and Positions				
~	Event:NewApplicant				
	Chevrier Nicole	Applied for Network Administrator I	2/12/2016		
	Covington Blair	Applied for Network Administrator I	2/12/2016		
M	< 1 ► ► Page size: 20 ▼				2 items in 1 pages

4. The recruiter clicks to **Convert to Candidate** or to **Reject** the applicant, and to add any notes concerning the applicant.

Rack Consults Constitute Constant		
Dack Convert to Candidate Reject Notes		
	1	
L		

- If the hiring manager clicks **Convert To Candidate**, the applicant **Status** changes to "Under Review" and the **Type** updates to "Candidate".
- If the hiring manager clicks **Reject**, the candidate is notified via email that they are no longer in contention as a potential candidate for the position and the **Status** in the dashboard for the applicant is updated to "Rejected", the **Type** remains.

			Applicants/Candidate	es			
Name	Click to Hire	Туре	Job Qualifications	CreatedOn	Job Score	Status	Action
Covington, Blair	×	Applicant	Quick view	02/12/2016		Rejected	-
Chevrier, Nicole	×	Candidate	Quick view	02/12/2016		Under Review	•

5. The recruiter clicks the Action dropdown menu and selects Schedule Interview.

			Applicants/Candidate	s			
Name	Click to Hire	Туре	Job Qualifications	CreatedOn	Job Score	Status	Action
O Covington, Blair	×	Applicant	Quick view	02/12/2016		Rejected	-
Chevrier, Nicole	×	Candidate	Quick view	02/12/2016		Under Review	-
							Change Status
Requisition Info							Schedule Interview
							Create Of
							Commen

- 6. The recruiter enters the following information to schedule the interview:
  - **Type**: Interview Type (requires Default Table Setup. Jobs and Postions Interview Type).
  - Interview Room: Interview Room (requires Default Table Setup. Jobs and Positions Interview Room).
  - Status: Interview Status (requires Default Table Setup Jobs and Positions Interview Status).
  - Date: Interview date (required).
  - Time: Interview time (required).
  - **Comment/Instructions for Candidate**: Enter text that will be received in the Interview Schedule Notification email to the candidate.
  - **Comment/Instructions for Interviewer**: Enter text that will be received in the Interview Schedule Notification email to the interviewer(s).
  - **Interviewers**: Select the interviewer(s) by checking the box next to the employee name.
  - Send interview schedule and candidate resume to interviewers: Checking this box sends the interview schedule and candidate resume via email to the interviewer(s).
  - Send interview schedule email to candidate: Checking this box sends the interview schedule via email to the candidate.

Schedule Intervi	ew	
Interview Def	tails :	
Requisition :		
Network Admi	nistrator I	
Type :	First Interview	Date :* 2/24/2016
Interview Room :	Zoom Meeting 💌	Time: * 3:00 PM
Status :	Scheduling in process	
Con	nments/ Instructions for Candidate	Comments/ Instructions for Interviewer
Join from PC, M	to a Zoom meeting Mac, Linux, iOS or Android: n.zoom.us/l/9677482924	<ul> <li>Please review resume and compose list of questions by 2/23.</li> <li>You are invited to a Zoom meeting</li> </ul>
	tap: 16465687788,9677482924# or	
Interviewers :*		
	Name	
	Kirk Jim	
	Uhura Nyota	
	Scott Montgomery	
	Mudd Harry	
	▶ Page size: 5 ▼	4 items in 1 pages
* 🗷 Send interv	iew schedule and candidate resume	e to interviewers
* 🗹 Send interv	iew schedule Email to candidate.	
Save Ca	incel	

• Scheduled Interviews appear in the Interviews pane within the requisition on the Job Requisition dashboard.



7. Interviewer(s) access the Interview Schedule pane within the requisition from the Job Requisition Dashboard and click on the hyperlink of their name.

Network Administrat	tor I													
Requisi	tion Details			Check List Items				Offer Letter De	tails			Notes		
Hiring Manager : Status : Valid From : Valid To :	Nyota Uhura Open 2/10/2016 3/11/2016			None		Candidate Name		Status Ca No Data Availat	andidate Offer Status		Need to hire this p	osition AS	AP	
				Applicants/Candidate	2S						Interviews			ĺ
© Covington, Blair		Click to Hire	Type Applicant	Job Qualifications Quick view	CreatedOn 02/12/2016	Job Score	Status Rejected	Action	Interviewer Name	Candidate Nar	ne Interview Date	Interview Time	Status	Feedb
Chevrier, Nicole		×	Candidate	Quick view	02/12/2016		Under Review		Uhura, Nyota	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	
									Scott. Montgomery	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	
									Mudd, Harry	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	

8. Interviewer(s) add Interview feedback and click Save.

Requisition	Network Administrator I
Recommendation	In favor of hiring candidate
Comments	
Comments:*	Strong candidate with technical aptitude and a great attitude. Familiar with the companies for whom she has worked and appreciate and understand their methodologies.
	1

- **Recommendation**: Interviewer hiring recommendation (requires Default Table Setup. Jobs and Positions Recommendation).
- **Comments**: Text concerning the candidate following their interview. Once the Interview Feedback is saved,, this text will become visible in the Interviews pane within the requisition.

	Int	erviews			
Interviewer Name	Candidate Name	Interview Date	Interview Time	Status	Feedback
<u>Uhura, Nyota</u>	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	No need for second interview, am satisfied that this is the candidate for the job.
<u>Scott. Montaomerv</u>	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	Strong candidate with technical aptitude and a great attitude. Familiar with the companies for whom she has worked and appreciate and understand their methodologies
Mudd. Harry	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	Not sure about core competencies, but on board overall.

9. Once interview feedback has been entered, the hiring manager accesses the Requisition and clicks the X in the **Click to Hire** column next to the candidate that has been selected to hire.

			Applicants/Candidate	es			
Name	Click to Hire	Туре	Job Qualifications	CreatedOn	Job Score	Status	Action
Covington, Blair	×	Applicant	Quick view	02/12/2016		Rejected	-
Chevrier, Nicole		Candidate	Quick view	02/12/2016		Under Review	-

10. A dialog box will appear with a confirmation message "Do you want to hire this candidate?" Click OK.

	Applicants/Candidates							
Name	Click to Hire	Туре	Job Qualifications	CreatedOn	Job Score	Status	Action	
Covington, Blair	×	Applicant	Quick view	02/12/2016		Rejected	-	
Chevrier, Nicole	<b>~</b>	Candidate	Quick view	02/12/2016		Draft Offer	•	

- The **Click to Hire** will now contain a green checkmark and the Status will update from "Under Review" to "Draft Offer".
- The recruiter receives an email notification that the candidate was approved to hire for the requisition.
- 11. Upon receiving approval for hiring the candidate for the requisition, the recruiter accesses the requisition and selects "Create Offer" from the **Action** drop down menu.

Requis	ition Details			Check List Items				Offer Letter	Detail
Hiring Manager :	Nyota Uhura	-		None		Candidate Name		Status	Cand
Status :	Open							No Data Ava	ailable
Valid From :	2/10/2016								
Valid To :	3/11/2016								
				Applicants/Candidat	es				
Name		Click to Hire	Туре	Job Qualifications	CreatedOn	Job Score	Status	Action	
Covington, Blair		×	Applicant	Quick view	02/12/2016		Rejected	-	
Chevrier, Nicole		*	Candidate	Quick view	02/12/2016		Draft Offer	-	
								Change Status	
								Schedule	

12. The recruiter completes the Offer Letter:



Offer Letter		
Name of the Candidate:	Nicole Chevrier	Send Offer Letter to Hiring Manager
Candidate Offer Letter Status:	None	
Offer Letter Template:*	Executive Candidate New Hire	
JobTitle :	Network Administrator I	
Salary Recommendation :*	\$67,000	
Bonus/Commission Recommendation :	\$0	
Relocation :		
Relocation Amount :		
Source :		
Agency Fee :	\$1,000	
Target hire Date :*	2/25/2016	
Equipment :		
Cell/Blackberry :		
Insert contents of offer letter below.		
Times New • B I U abs Size		
Dear [First Name],		A
[Company Name] is happy to extend an offe	r to you for the position reporting to [Reports To].	
We would like to offer you a salary of [Salary	Recommendation]with a start date of [Start Date].	
We are looking to fill the position by [Target	Hire Date].	•
Design      HTML      Preview     Preview		th.
Save Cancel		

- Name of the Candidate: Auto populated with the candidate name.
- Candidate Offer Letter Status: Select from dropdown menu.
- Offer Letter Template: Templates are set up in Communication Templates (required).
- **Relocation**: Check box if relocation is part of the offer.
- **Relocation Amount**: Dollar amount for relocation as part of the offer.
- **Source**: Source for the requisition.
- Agency Fee: Agency fee for the requisition.
- **Target Hire Date**: Target hire date for the requisition (required).
- **Equipment**: Equipment provisioned for the position.
- **Cell/Blackberry**: Check box to indicate phone is provisioned for the position.
- **Contents of the Offer Letter**: Auto populated with the contents of the Offer Letter Template. *Adjust content to personalize as necessary.*
- Send Offer Letter to Hiring Manager: Check box to send email notification to the hiring manager to review the draft offer letter.
- 13. Click Save.
  - The Hiring Manager receives email notification containing the details of the draft offer letter to the candidate for approval.

Please review the draft offer letter for Nicole Chevrier	Please click here to approve the offer letter
JobTitle	Network Administrator I
Salary Recommendation	\$67,000.00
Bonus	\$0.00
Relocation	No
Relocation Amount	\$0.00
Source	
AgencyFee	\$1,000.00
Target HireDate	2/25/2016
Equipment	
Cell	No
Additional Instructions :	Dear Nicole,
	Shelburne Inn & Shoppes - Will is happy to extend an offer to you for the position reporting to Nyota Uhura.
	We would like to offer you a salary of \$67,000.00with a start date of [Start Dat
	We are looking to fill the position by 2/25/2016.
	Please let us know your decision within 5 business days from receipt.
	Please feel free to reach out to your recruiter with any questions.
	Congratulations and we look forward to hearing from you!
	Sincerely,

14. The Hiring Manager clicks on the "Please click here to approve the offer letter" hyperlink contained in the email.

**Note:** At the end of the requisition process, you must still perform the Add New Hire process to officially add a new hire to the system; the Applicant Tracking and Requisition feature does not automatically add a new hire. Refer to the *New Hire Workflow* section in this document.

# **Chapter 9: Reports**

The Advanced HR Reporting menu provides access to the following reporting related features:

- **Custom Reports** •
- Audit Reports
- Standard Reports
- **Benefits Reports**

### **Using Standard Reports**

Standard Reports in Advanced HR are a combination of custom reports that have been saved for editing and an extensive library of reports that ship with the product and are not editable by users. All of the custom defined reports you have created will show in addition to the built-in reports and are combined into a single list for review.

You can use the Export button to export a standard report to Excel, PDF, Word, and other file types.

To use a standard Advanced HR report:

- 1. On the Advanced HR Home page, click the **Reporting** menu item.
- 2. On the **Reporting** menu, click the **Standard Reports** menu item.

Result: The system displays the Human Resources Management Reports screen.

Hun	han Resources Management Reports
¢	Add 😫 Delete
	Report Name
	Approved Expenses Report
	Birthdavs
	Bi-Weekly EEs
	Current Benefit Elections
	Direct Deposit Waive
	EEO Non-Fileable Info
	EEO Utilization Analysis Report
	EEO1 Report
	Email Address
	Emergency Contact
	Emergency Contacts
	Employee C&L
	Employee Directory
	Employee OEHealth Benefit Cost
	Employee Roster
	Employees Assets
	Employees BirthDate
	Employees Class Code Eligibility
	Employees Compensation
	Employees Demographics
	the set of a second

3. Click on the link for the report that you want to run, for example, Employee Roster. Result: The system displays the report results on a separate tab on the screen.

Reporting Utilities	Setu			
Custom Reports				
Audit Reports				
Standard Reports				
Benefits Reports				



Company Nam	e Roster	& Shoppes	Run D	ate: 06/13/201	6
Employee Name	Job Title	Department	Hire Date	Rate Type	Compensation
todd,leavitt	Assistant to the Assistant Manager	_	02/19/2016	Weekly	
Adam,Rees	Restaurant Manager		09/08/2013	Weekly	102,000.00
Megan,McCarthey	HR Assistant		02/14/2016	Weekly	
Liam,Mackenzie	N/A		09/17/2013	Weekly	
Gabrielle,Newman	N/A		09/10/2013	Weekly	
Adrian,Mackay	N/A		08/15/2013	Weekly	
William,Carr	N/A		09/10/2013	Weekly	
Gavin,McLean	N/A		09/09/2013	Weekly	
Harry,Randall	N/A		09/01/2013	Weekly	
Jason,Ellison	N/A		09/16/2013	Weekly	
Stephanie,Clark	N/A		09/05/2013	Weekly	
Christopher, Davies	N/A		09/01/2014	Weekly	
Victor,Scott	N/A		09/14/2013	Weekly	
Anne,Blake	Reception		09/13/2013	Weekly	
Wendy,Rees	N/A		09/14/2013	Weekly	
Elizabeth, Ince	N/A		09/06/2013	Weekly	
Abigail,Brown	Trainer		09/01/2014	Weekly	1500
Andrew,Allen	CEO		12/14/2015	Weekly	
Isaac,Mackay	N/A		08/15/2013	Weekly	
Anthony,Leary	Assistant to the Assistant Manager		04/12/2016	Weekly	1300

You can use the Export button to export the report to one of the following types:

Ц,	
	XML file with report data
	CSV (comma delimited)
	PDF
	MHTML (web archive)
	Excel
	TIFF file
	Word

### Using Custom Reports

Use the **Custom Reports** Reporting menu option as an ad-hoc reporting tool. You can also create and define reports that you want to run in the future.

The Custom Reports feature lets you:

- Have the report results appear on the Home page or on a separate tab from the Reports screen
- Create an InfoBlock (summarized totals)
- Share the report with other people in the organization or run it for you only

Use the custom reports for any additional reporting needs beyond what the standard (built-in) Advanced HR reports provide.

To create a custom report:

- 1. On the Home page, click the **Reporting** menu item.
- On the Reporting menu, click Custom Reports.
   Result: The system displays the Custom Reports screen.



C Home > Reporting >	Custom Reports				-Type to Search-
Report Name :*				Display on home page	Share with others
				Create InfoBlock	
Select Form:*	Select	<b>•</b>	 4	Analysis	
Fields in Form:					
			1	Filter	
Sort Order:	Select 🔻	•			
			Save Cancel	Preview report	

- 3. Enter a name for the report in the **Report Name** field.
- 4. **Select** the **Form** (similar to the screen that you want information from), for example, select **Personal Information**. You can select multiple Form options as shown below.

Select Form:*	Employment, PersonalInfo	•
Select Form:*	Employment, PersonalInfo	•

5. In the **Fields in Form** section, click on the Form(s) to list the fields to select from that you want to have on the report. Double-click on the field (or drag it) to move it from the left to the right side of the screen.

Report Name :*	est Report			
Select Form:*	Personalinfo		•	
Fields in Form:	Personalinfo	^	Birth Date	
	Address Line 1	- 11	Last Name	
	- Address Line 2		First Name	
	- Alias		City	
	Country	- 11		
	Driver's License C	Count		
	Driver's License E	ispira		
	- Driver's License M	iumt		
	- Driver's License S	tate		
	Ethnicity			
	Gender	-		
	4	+		

- 6. Use the **Sort Order** field to sort the data the way you want.
- 7. Select the **Display on Home page** option to have the report results appear on the Home page.
- 8. Select the **Share with others** option and a dropdown field appears to the right for you to choose roles to share the report with.



- 9. Select the **Create InfoBlock** option if you want the report to have summarized information. If so, click the **Analysis** link to set the totaling criteria.
- 10. Click **Save** to save the report. The system displays a list of the reports including any existing ones already created.

Test Report

11. To execute the report, click on the report name in the list. The system then runs the report and displays the results. See the sample Test Report below.

Test Re	anorf		
	sport		
Last Name	First Name	Birth Date	City
Kirk	Jim	09/08/1966	Ann Arbor
Kirk	Jimmy	11/24/1966	Montpelier
McCoy	Lenny	12/22/1964	Enterprise
Mudd	Harry	01/10/1973	
O'reilly	Kevin	01/06/1984	Montpelier
Scott	Montgomery	09/08/1966	Enterprise
Spock	Mister	09/08/1966	Starbase
Spock	Mister	01/13/1972	Enterprise
Sulu	Hikaru	09/06/1966	San Francisco
Uhura	Nyota	12/04/1961	Enterprise

You can use the Export button to export the report to various types such as Excel, PDF, or Word.

## Using Audit Reports

Use the Audit Reports Reporting menu option to run audit reports:

- By Location
- By Status
- Specify a Starting Date and Ending Date
- Audit a specific individual employee or all employees

To create an audit report:

- 1. On the Home page, click the **Reporting** menu item.
- 2. On the Reporting menu, click **Audit Reports**.

Result: The system displays the Employee Audit Report screen.

Employer Audit Rep	port				
Company Name :	187 Shelburne Inn & Shoppes - Will				
Select Location :	All	•	Employee :	All	•
Status :	All	•			
From Date* :			To date* :		
В	ack				Show Report

- 3. Select a location from the **Select Location** dropdown.
- 4. Select a status from the **Status** dropdown.
- 5. Enter or select a **From Date** (starting date) using the Calendar icon.
- 6. Enter or select a **To Date** (ending date) using the Calendar icon.
- 7. Select an employee or all employees to audit from the **Employee** dropdown.
- 8. Click the **Show Report** button. The system displays the results of the report on a separate tab.

#### **Employee Audit Report**

Name	Form Name	Section Name	Field Name	Old Value	New Value	Changed Date	Changed By
Goode Alice	Employment	Employment	Badge Number	EEO1330	manageboth	05/20/2016	Goode Alice
Goode Alice	Employment	Employment	Туре		W-2	05/19/2016	Goode Alice
Goode Alice	Employment	Employment	Badge Number	EE01330	agoode	05/19/2016	Goode Alice
Goode Alice	Employment	Employment	Badge Number	agoode	EE330	05/19/2016	Goode Alice
Goode Alice	Employment	Employment	Badge Number	EE330	EE01330	05/19/2016	Goode Alice
Goode Alice	Employment	Points	Date		05/12/2016	05/12/2016	Blake Mike
Goode Alice	Employment	Points	Comments		Arrived 47 minutes after shift started.	05/12/2016	Blake Mike
Goode Alice	Employment	Points	Reason		Late Without Calling	05/12/2016	Blake Mike

The Employee Audit Report has the following column fields:

- Name
- Form Name
- Section Name
- Field Name
- Old Value
- New Value
- Changed Date
- Changed By

You can use the Export button to export the report to various types such as Excel, PDF, or Word.

#### Using InfoBlocks

InfoBlocks are a method of creating a particular report (such as a custom report) that has summarized information such as the number of active employees in an organization, then embedding that information into the Manager Portal and into the Landing page of the product. Use an InfoBlock report to produce some sort of summary data. InfoBlocks are a useful option when you are creating a custom report.

For example, to create an infoblock of Active Employees:

- 1. On the Home page, click the **Reporting** menu item.
- On the Reporting menu, click Custom Reports.
   Result: The system displays the Custom Reports screen.
- 3. Enter a **Name** for the report (for example Active Employees).
- 4. Select the **Form** (similar to the screen that you want information from), for example, select **Employment** & **Personal Info**. You can select multiple form options.
- 5. In the **Fields in Form** section, choose **Status** from the **Employment** form. Also select the **Name** field from the **Personal Info** form.
- 6. Select the **Create InfoBlock** check box.
- 7. Select the **Analysis** option.

Result: The screen displays an Analysis section.



Operator	Field	Display SubTotal	Summary	Edit	Delete
		No data	to display		
d New Analy					

Select these options:

- In the **Operator** field, select **Count**.
- In the Field column, select the Last Name, First Name fields.
- Select Display Subtotal.
- Select Summary.
- 8. Click the **Save** button to save the report.
- 9. You can preview the report by clicking the **Preview Report** button.

For our sample report, here is how we set the Analysis:

	_				
Operator*		Field	Display SubTotal	Summary	
Count		Last Name , First Name ·	2	2	-

And here is a partial preview Sample InfoBlock showing the end section of the report.

Alyssa's Sample Client			
Company Name	LastName		
	Grand Total		45
	Total		45
	10/22/2014	401K Fixed	Employee
	12/03/1982	1099-W2	Employee
	01/31/1982	Multi Garnishment	Employee
	06/10/1980	Notes	Employee
	04/04/1975	Garnishment	Employee
yssa's Sample Client	02/25/1975	NY SDI	Emp

The Totals (end section) of the report will also appear on the Home page of Advanced HR.

### Selected Reports details

The following sections provide some detail about selected reports available in Advanced Hr:

- EEO-1 Report (S455)
- EEO-1 Section D Employment Data Report (S1537)
- VETS 100A Report

#### EEO-1 Report

The EEO-1 Report (S455) is a current 'snapshot' of the number of employees by EEO Class and Descriptions of Ethnicity. This report is required for compliance purposes. The report lists only active employees, not terminated employees.

• The Employee's EEO Code is taken from the Employment screen: Job Class field:

Job Class: 6 Craft Workers

The Employee's ethnicity is taken from the Employees – Personal screen: Ethnicity field:
 Ethnicity:\* Hispanic Or Latino

A sample EEO-1 Report is shown below.

EO Class	Description	Count	
0	No EEO Class Assigned	216	
1.1	Exec/Sr Level Officials & Managers	0	
1.2	First/Mid-Level Officials & Managers	0	
2	Professionals	0	
3	Technicians	0	
4	Sales Workers	0	
5	Administrative Support Workers	0	
6	Craft Workers	1	
7	Operatives	0	
8	Laborers & Helpers	0	
9	Service Workers	0	
	Total	217	
Ethnic Code	Description	Head Co	unt
0	Not Applicable/Declined to State	130	
1	Black Or African American	6	
2	Hispanic Or Latino	5	
3	Asian	17	
4	American Indian Or Alaska Native	21	
5	White	11	
6	Other	12	
7	Native Hawaiian Or Other Pacific Islander	6	
8	Two Or More Races	9	
	Total	217	

#### EEO-1 Section D Employment Data Report

The EEO-1 Section D Employment Data Report (S1537) describes how many employees by gender and race are working in each job category in the company. Unlike the regular EEO-1 Report that does not take into account gender (at all) and ethnicity/EEO Class relation, the EEO-1 Section D Employment Report does take gender into account.

A sample EEO-1 Section D Employment Data Report is shown below.

EEO-1 Section D	Employment Da	ata Rej	port															
Company NE	W_2		i															
Generation Date 08-	23-2016																	
									F	RACE/ETH	IICITY							
	Hisp	panic C	Or Latino						-	Non-Hispar	ic Or Latino							
	Ma	le	Female				Male							Female				
JOB CATEGORIE	s			American Indian Or Alaska Native	Asian	Black Or African American	Native Hawaiian Or Other Pacific Islander	Other	Two Or More Races	White	American Indian Or Alaska Native	Asian	Black Or African American	Native Hawaiian Or Other Pacific Islander	Other	Two Or More Races	White	Total
Exec/Sr Level Officials & Ma	anagers 0		1	0	1	1	0	0	0	0	0	0	0	0	0	0	0	3
First/Mid-Level Officials & N	fanagers 0		0	1	0	0	0	0	0	0	0	0	0	0	0	1	0	2
Professionals	0		1	0	2	0	0	0	0	0	0	0	0	0	0	0	1	4
Technicians	0		1	1	0	1	0	0	0	2	0	0	0	0	0	0	0	5
Sales Workers	1		0	0	0	1	1	0	0	0	1	0	0	0	0	0	0	4
Administrative Support Wor	rkers 1		1	0	0	0	0	0	1	0	0	1	1	2	0	1	0	8
Craft Workers	0		0	0	0	0	0	0	1	0	1	0	0	1	0	0	0	3
Operatives	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Laborers & Helpers	0		0	0	0	1	0	0	0	0	0	0	1	0	0	0	0	2
Service Workers	0		0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
Total	2		4	2	3	4	1	0	2	3	2	1	2	3	0	2	2	33

#### VETS - 100A Report

The HR VETS – 100A report helpd service bureaus meet their compliance requirements. A sample of the report is shown below.

JOB CATEGORIES		NUM	BER OF EMPLOY	YEES			NEW HIRE	S (PREVIOUS 12	2 MONTHS)	
	DISABLED VETERANS (L)	OTHER PROTECTED VETERANS (M)	ARMED FORCES SERVICE MEDAL VETERANS (N)	RECENTLY SEPARATED VETERANS (O)	TOTAL EMPLOYEES,BOTH VETERANS AND NON-VETERANS (P)	DI SABLED VETERAN S (Q)	OTHER PROTECTED VETERANS (R)	ARMED FORCES SERVICE MEDAL VETERANS (S)	RECENTLY SEPARATED VETERANS (T)	TOTAL EMPLOYEES.BO H VETERANS AND NON- VETERANS (U)
No EEO Class Assigned	15	11	12	2	827	14	11	11	2	405
Exec/Sr Level Officials & Managers	0	0	0	0	1	0	0	0	0	0
First/Mid-Level Officials & Managers	0	0	0	0	0	0	0	0	0	0
Professionals	0	0	0	0	0	0	0	0	0	0
Technicians	0	0	0	0	0	0	0	0	0	0
Sales Workers	0	0	0	0	0	0	0	0	0	0
Administrative Support Workers	0	0	0	0	0	0	0	0	0	0
Craft Workers	0	0	0	0	0	0	0	0	0	0
Operatives	0	0	0	0	0	0	0	0	0	0
Laborers & Helpers	0	0	0	0	0	0	0	0	0	0
Service Workers	0	0	0	0	0	0	0	0	0	0
Total	15	11	12	2	828	14	11	11	2	405

Unlike in Evolution Classic, this report in Advanced HR will show the last 12 months and the current number of employees.

# Chapter 10: Benefits Enrollment

## Initial benefit settings & setup

Administrators must perform some initial benefit setup tasks before end users can access and use the Benefits feature. Refer to the Advanced HR User Guide – Service Bureau version.

### Available Benefits in Advanced HR

In Advanced HR, users can create the following Benefit Plans and, upon employee enrollment, the appropriate Scheduled E/D will automatically be created.

- Medical
- Vision
- Dental
- Custom plans with configurations similar to the three plans listed above. For example, a gym membership benefit plan structured in a similar manner to one of the plans above.

In Advanced HR, users can also create the plans listed below for employee enrollment, however these will require that the administrator create a scheduled E/D manually for the employee upon enrollment.

- FSA
- HSA
- Life, and AD&D
- Dependent FSA
- 401k
- Short & Long Term Disability

Note: Direct Payroll scheduled E/D integration for these benefit plan types will be available in upcoming releases.

#### Medical, Dental, and Vision Benefit Plans

In Advanced HR, many types of benefits have very similar setup. For instance, Medical, Dental, and Vision Benefits utilize much of the same logic, and therefore, are set up very similarly. In this section, you will learn how to set up a Medical, Dental, and Vision plans for use with Advanced HR. You may also use this type of plan to set up non-standard "benefits" such as a Gym Membership.

To create a Benefit Plan for Medical, Dental, or Vision:

1. Go to Administration – Benefits.

JOB REQUISITION S	JOB PROFILES	POSITION S	COMPENSATION
Candidate Database	Job Duties	RECRUITING PROFILES	MANAGEMENT
NEW HIRES Add New Hire Self Service On Boarding	Job Qualifications PME	Recruiting Questions Recruiting Documents ONBOARDING PROFILES	TRAINING Tracks Classes
Add New Agent		Consent Documents	TRAINING MANAGER
BENEFITS		COMPEN SATION	VIEW
Employee Benefit Elections		PROFILES	Workflow Dashboard
Benefit Classes Eligibility Group		WORK PROFILES	Workflows
Waiting Periods Life Events		BUDGET PROFILES	
Dependent Types			
Primary Care Physician			
COBRA			
Approve Life Events			
Update Life Events			
Employee Plan Termination			

2. On the Plan Dashboard, click on the **Add** button.

Plan Dasht	board					
🛟 Add	🗱 Delete					
	Plan Name	Plan Type	Plan Description	Plan Start Date	Plan End Date	
	T	T	T	T		
	Cigna - Medical	Medical	Cigna - Medical	01/01/2016	12/31/2016	Copy
	Cigna - Medical Plus	Medical	Cigna - Medical Plus	01/01/2016	12/31/2016	Copy
14 4 1	► ► Page size: 15 -					2 items in 1 pages

- 3. Select the **Plan Type** from the drop-down menu.
  - Select Medical, Dental, or Vision, to match the plan you are setting up.

Туре	Info	Enrollment	Admin	Matrix	Rates	Allocation	Display		
Plan Type									
What type of p	lan would	you like to Create	?						
Plan Type:*	Medic	al	•						
Save	Exit	Next							

4. Click Next.

5. Enter the plan information in the **General Info** section. The table below describes the required information.

Field Name	Definition
Plan Type	Defaults to the type chosen from step 3.
Plan Code	Enter the code for this plan. Example – PPO, PPO High, etc
Plan Name	Enter a name for this plan.
Plan Description	Enter a description for this plan.
Plan Year Start Date	Enter the first date that this plan will be effective.
Plan Year End Date	Enter the last date that this plan will be effective.
Plan Effective Date	Select from the drop-down list the plan effective date description.
Election Type	Select if this is an Employee or spouse type of election.
Deduction Frequency	Select how often the Benefit will show on the employees stub, and be deducted, if a deduction is to occur.

Info Enrollment	Admin Matrix Rates	Allocation Display	
General Info			
Plan Type :*	Medical	Plan Code :*	HMO - High
Plan Name :*	HMO - High	Plan Description :*	HMO - High
Plan Year Start Date :*	6/1/2016	Plan Year End Date :*	5/31/2017
ERISA Plan Number :		ERISA Plan Year Ending :	
Policy Number :		Group Number :	
Certificate Number :		Funding Type :	Fully Insured
Plan Effective Date :*	Open Enrollment 🔻	Recalculate Age:	Select
Election Type :*	Employee 🔻	Related Plan:	Select
Deduction Frequency :*	Every Scheduled Pay		

6. Select the information in the **Benefit Information** field. The table below describes these fields:

Field Name	Definition
Benefit Structure	Select the Benefit Structure from the drop-down list. On a Medical, Dental, or Vision plan, the Benefit Structure will always be a Tier Structure.
Rate Structure	Defined by the Benefit Structure selected. On a Medical, Dental, or Vision plan, this will always be a Tiered Rate Matrix.
Dependent Types	Select <b>Dependent</b> or <b>Beneficiary</b> types. On a Medical, Dental, or Vision plan, only Dependents will be available.
Termination Coverage	In the event of employee termination, should the plan end on the termination date, or the end of the month after termination.
Used for ACA	Select <b>Yes</b> if this a Medical Plan that will be used to define ACA Affordability and Coverage.
Auto – Enroll	Select <b>Yes</b> if employees will be automatically enrolled in this plan.
Primary Care Provider	Select Yes to enter the Primary Care Physician for this plan.
Plan Association	If this plan is to be associated or linked to another plan, click on the <b>Click</b> Here link to see additional questions.
Are there additional plans automatically offered when this plan is elected?	Select <b>Yes</b> if there are other plans that will be offered in conjunction with this plan. This is often used on Medical Plans when an HSA plan will be offered once the Medical plan has been elected.
Are there other plans that the employee must elect prior to electing this plan?	Select <b>Yes</b> if the employee must elect a different plan before they can elect this one. This is often used on an HSA plan that requires a specific Medical plan be selected before the employee can elect the HSA plan.

Benefit Structure :*	Tier Matrix	Dependent Types	Dependents	▼ Used for ACA :	Yes	○ No	Primary Care Provider Required:	O Yes	No
Rate Structure	Tiered Rate Matrix	Termination Coverage:	End of the Month	▼ Auto Enroll:	O Yes	No			
Plan Associat	lion								
			alasta 12 October October						
		offered when this plan is	elected? 🔘 Yes 🖲 No						
Are there addition	onal plans automatically	offered when this plan is must elect prior to electi							

7. Click Next.



- 8. On the **Enrollment** tab, select if the benefit will require:
  - Beneficiaries.
  - Date of Birth for Dependents, Beneficiaries, both or none.
  - Social Security Number for Dependents, Beneficiaries, both or none.
- 9. Click Add/Remove states to list the states for which this benefit will be available. Employees who reside within the selected states will be able to enroll in this benefit, provided they are eligible for benefits enrollment.
- 10. Click the Plus sign to add additional enrollment questions. Each benefit has the ability to have three (3) additional enrollment questions.

Attributes							
Required Seneficiaries:	No	Yes				tions: 🕂 Add 🙁 Remove	
Required Date of birth:	None	O Dependents	O Beneficiaries	All	Question No	Question Do you smoke? Do you exercise regularly?	
Required SSN:	None	<ul> <li>Dependents</li> </ul>	<ul> <li>Beneficiaries</li> </ul>	All	2	Do you exercise regularly? Do you have a gym membership?	
Alabama Alaska Arizona							
Arizona Arkansas							
California Colorado							
Confusion Connecticut							
Delaware Florida							
<b>                   </b>	56 🕨 🕅	52 it	ems in 6 pages				
evious Save	Exit	Next					

11. Click **Next** when complete.

12. On the **Admin** page, select the information for the following fields:

Field Name	Definition
Internal Plan Administrator	Select the role of the individual who will be responsible for Benefits Administration.
Plan Carrier	The Benefit or Insurance Provider entered in the Default Table.
Plan Contributions remitted to	Will the Plan contributions be sent to the Carrier or a Third Party Administrator (TPA)?
Is there a Plan Wide Billing fee paid to the Carrier for this plan?	Select <b>Yes</b> if such a fee exists.
Do you have a Third Party Administrator for this plan?	Select <b>Yes</b> if this plan is being administered by a Third Party.
Do you have a PPO for this plan?	Select <b>Yes</b> if this is a PPO plan.

Info Enrollment Admin Matrix Rates Allocation Display
Client Plan Administrator
Who has the Client appointed as the Plan Administrator for this Benefit?
Internal Plan Administrator :* Administrator
Plan Carrier
Please select the Carrier for this Plan. If the Plan is Self-Insured, select the "Self-Insured" as the Carrier
Plan Carrier :* Aetna
Plan Contributions remitted to : Carrier
Is there a Plan-Wide billing fee paid to the carrier for this plan ? O Yes 🖲 No
Third Party Administrator (TPA)
Do you have Third Party Administrator(TPA) for this Plan?
Preferred Provider Organization (PPO)
Do you have Preferred Provider Organization (PPO) for this Plan ? 🛛 🔍 Yes 💿 No
Previous Save Exit Next
Do you have Third Party Administrator(TPA) for this Plan ? Preferred Provider Organization (PPO) Do you have Preferred Provider Organization (PPO) for this Plan ? Yes No

13. Click **Next** when complete.

- 14. On the **Matrix** tab, create the benefit Tiers for which rates will be defined.
  - First, define how the tiers will be based. In our example for Medical, we will choose **Any**.
    - i. Age Used for Age Banded Tiers.
    - ii. **Employee Type** Used for tiers that will be based on the type of employee.
    - iii. **Employee Status** Used when tiers will be based on the Status of the employee.
    - iv. Any Used when any employee may be considered.
  - Next, define the tiers. Commonly, for Medical, Dental, or Vision plans, this would be considered the Level of the plan. For example, Employee Only, Employee and Dependent, or Employee and Family.
  - The screen will display one plan column or tier by default, to add additional columns, click on the downward facing arrow next to the plan tier and select Add Column to the Right or Add Column to the Left.
  - Under the tier that will be used for ACA Affordability and Reporting, select the Lowest Cost Plan.

Info	Enrollment	Admin	Matrix	Rates	Allocation	Display	
Tiered Bene	efit Matrix						
Based On: Any	•		EE		- Delet	e Column	
Lowest Cost F	Plan:					Column Column to	•
Previous	Save Exi	Next			Add C Right	olumn to	

- 15. Click **Next** when complete.
- 16. On the **Rates** tab, enter the actual Monthly cost of each of the tiers. As well as the maximum number of dependents that will be allowed for each benefit.

Dependents can only be assigned to tiers during enrollment if they are allowed on this screen. For EE only, enter **0** or leave blank. For a tier that is the Employee and one other dependent or spouse, enter **1**.

Info	Enrollment	Admin	Matrix	Rates	Allocation	Display			
	ld be configured fo	or the monthly	plan cost						
Tiered Rate Based On:	Matrix								
Any	•	EE			·	EE + Dependent	-	EE + Family	<b></b>
Max Depender	nts :	100				200		500	
		U				1		10	
Previous	Save Exit	Next							

- 17. Click **Next** when complete.
- 18. On the **Allocation** tab, enter the allocation details.
  - Contribution Basis If the cost of the benefit will be applied per paycheck, select this option. If
    it must be applied in a different frequency, select other, and then select the frequency.
  - Tax Contribution: Select if this is a Pre or Post tax benefit.
  - **Deduction Codes**: Select the Deduction Codes to be used for the Employee (EE) cost and the codes to be used for the Employer (ER) cost of the benefit.

- **Cost Structure**: If this benefit will be cost shared by the Employee and Employer, select **Cost Sharing**. If it is not, then select the option of whom should pay for the benefit.
  - i. This is necessary to determine the Scheduled E/D that will be created when the employee enrolls in this benefit.
- To automatically determine the amount of cost sharing, enter the Percentage or Dollar amount into the Employer Cost OR the Employee Cost and click on **Calculate Contribution**. Advanced HR will automatically fill in the Employee and Employer shares based on this amount.
- To manually enter this information, click on the **Manual Adjustment** box and enter the amounts for each of the tiers.
- Adjustment Schedule: If an adjustment schedule exists for this benefit, select the Text Description only option and enter the Adjustment Text.

Info Enro	ollment Adı	nin Matrix	Rates Allocatio	on Display			
Contribution Basis :	Per Pay Cl	neck 🔍 Other					*
2. Is the plan con	tribution pre-tax	or post-tax?					_
		or post-tax i					
Tax Contribution :	Pre-Tax	O Post-Tax	t				- 1
Deduction Codes :	EE Codes *			I	ER Codes		- 1
	Select		-		Select	•	
3. What is the cos	st structure of th	iis plan?					
Cost structure :	Cost Sharing	ng 0100 % E	mployer Paid 🛛 100% E	mployee Paid			
Employer Cost	F*						
Employer Cost :	Co	st: 35	۰ % 🔍 ډ	Calculate Cor		Manual Adjustment :	
Unbound C	Contribution	EE 35.00	EE + Dependent	EE + Fam	ily		
	Employee Employer	35.00	70.00	175.00 325.00	]		
	2	05.00	130.00	323.00			_
	4						_
4. Does an adjust	tment schedule	apply to this plan	/				
Adjustment schedul	le :	T 🔘	ext description only				- 1
					~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
Previous Save	e Exit Ne	xt					

- 19. Click **Next** when complete.
- 20. The **Display** tab will allow you to configure how the Benefit option is displayed to the employee when they are going through open enrollment. You may add the following information.
  - Provider Plan Logo and Verbiage about the provider and plan.
  - Icons for Plan features if the plan has additional features such as discounted Gym Memberships or chiropractic and massage therapy services.
  - The ability to add content and display it during the enrollment process such as Video, URL, or Documents about the plan.

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Info	Enrollment	Admin	Matrix	Rates	Allocation	Display					
Display S	ettings										
This scree You can ad	n will allow you to ( Id documents such	customize the P h as Plan Detail	lan informatio s, links to find	n that is dis a doctor, mu	played to the enr Iltimedia such as	ollee. video and plan rat	tings.				
Display Te	emplate										
Click on the	e buttons below to	create and eac	h section. You	r changes w	vill be displayed i	n the preview secti	ion below.				
Plan Info	ormation										
Provide	r Plan Logo		Ac	ld Verbiage							
lcons fo	r plan features		<u>Ac</u>	ld Verbiage							
Add Cor	<u>ntent</u>	Add Content	Ac	ld Verbiage							
Add Cor	<u>ntent</u>	Add Content									
review											
The Previe	w section displays	your sections.	Use the temp	late above to	o make changes						
Plan Info	ormation				Contri	bution					
HMO - I	High						Unbound	Contribution	CC.	EE + Dependen	t EE + Family
Ŷ	Cigna.				Instructions : Ple and click on Sul		onbound	Employee Employer	\$35.00 \$65.00	\$70.00	\$175.00 \$325.00
<u>Benefit</u>	Cost Summary										
Previous	s Save	Exit									

- 21. Click **Save** once completed.
- 22. Repeat these steps to configure all necessary Medical, Dental, or Vision plans.

# 401(k), HSA, FSA, and FSA Dependent Care Benefit Creation

In Advanced HR, a 401(k), HSA, and FSA plans can be created for enrollment, however, a scheduled E/D would need to be manually created by the Administrator upon employee enrollment in these plans.

**Note:** Upcoming releases to Advanced HR will include functionality to automatically create a scheduled E/D when employees enroll in these plans.

**Setup Information:** Prior to creating a 401(k), HSA, FSA, or FSA Dependent care plans, the Plan years must be set up in the Default Table Setup (**Setup – Default Tables Setup – Benefits – Savings Plans**). The Plan Years are used to define the Date that the savings plans can begin as well as that year's maximum contribution value. Since contribution limits may change from year to year, it is recommended that these are set up in advance when the plan year limits are learned. You may need to create the Single Plan or Family Plans as well as a Catchup Plan Year. Once the plan year is created, you can create the benefit for open enrollment.

To create the Plan Year information:

- 1. Go to Setup Default Tables Setup Benefits Savings Plans.
- 2. Click Add.
- 3. In the **Category** drop-down list, select the type of plan to create. Example 401K.
- 4. In the year, select the start date of this plan year.
- 5. In the **Tier** drop-down list:
  - Select **Single** for the Single HSA or FSA plan or the standard 401(k) plan contribution.
  - Select Family for the Family HSA or FSA plans.
  - Select **Catchup** for the Catchup Plan contribution.
- 6. In the **Value** field, enter the maximum contribution for that plan year for that type of plan.
- 7. Select **Active**, to make this the active Contribution cap.
- 8. Click **Save** when completed.

BENEFITS > Savings Plans					
Savings Plans Se	tup				
Catananat	401K <b>•</b>				
Category : * Year : *					
Tier:*	<u>6/30/201€</u>				
Value : *	Single				
	\$18,000.00				
Active :	8				
5	Save Cancel				

Now that the plan year is present, we can create the benefit for open enrollment. In our example, we will use 401K, however the HSA and FSA plans are created in the same manner.

To create a 401(k) plan:

- 1. Go to Administration Benefits.
- 2. Click on Add.
- 3. Select **401(k)** from the plan **Type** drop-down menu.
- 4. Enter the information on the Info, Enrollment, and Admin tabs.

**Note:** For additional information on these tabs, please review the *Creating Medical, Dental, and Vision Benefit Plans* section of this guide.

Field Name	Definition		
Contribution Basis	Defaults to <b>Per Pay Check</b> . Select <b>Other</b> to change to a different frequency.		
Tax Contribution	Defaults to Pre-Tax.		
Variable Election	Selected. This field is Read Only for 401(k), HAS, and FSA plans.		
Deduction Codes	Not present for 401(k) plans. Select EE and ER codes for HSA and FSA plans.		
Election Units	Select if the employee can enter a percentage, a dollar amount, or either.		
Saving Category	Select <b>401K</b> when creating a 401K Benefit plan.		
Contribution Limits	<ul> <li>Enter in the maximum annual amount or the maximum percentage.</li> <li>When percentage is selected in the Election Units field, only a Min and Max Percent must be entered here.</li> <li>When Dollar is selected in the Election Units field, only Min (annually) and Max (Annually) dollar amounts must be entered here.</li> <li>When BOTH is selected in the Election Units field, both sets of Minimum and Maximum amounts must be entered.</li> </ul>		
Employer Contribution	Enter in the Employer Match, if any exists.		
Cost Structure	100% Employee Paid is selected. This field is read only for 401(k), HSA, and FSA plans.		
Adjustment Schedule	Enter text if there is an adjustment schedule.		

5. On the Allocation tab, select the following information

Advanced HR User Guide – End User	Evolutio Advanced
Info Enrollment Admin Allocation Display	
Contribution Structure	•
1. What is the contribution schedule for this plan?	
Contribution Basis :	
2. Is the plan contribution pre-tax or post-tax?	
Tax Contribution :	
VariableElection : 🖉 VariableElection	
Election Units: O % O \$ ® BOTH	
Saving Category: 401K 💌	
Contribution Limits: * Min (annually): \$ 18,000.00 \$ 18,000.00	
Min Percent: 0.00 % Max Percent: 15.00 %	
$\bigcirc  0.00\%  \ddagger \text{ of annual salary up to max of } \$ 0.00$	
(a) $100.00\%$ of employee contribution up to max of $6.00\%$ of	fannual salary.
S 0.00     If at amount per month up to max of \$ 0.00     S 0.00	
3. What is the cost structure of this plan?	
Cost structure : 0100 % Employer Paid 0100% Employee Paid	
4. Does an adjustment schedule apply to this plan?	
Adjustment schedule :   Text description only	
Previous Save Exit Next	

- 6. Click **Next** to continue.
- 7. On the **Display** tab, enter the information to display to the user during benefit enrollment.
- 8. Click on **Save and Exit** when completed.

#### Setting up a short term Disability Plan in Advanced HR

In Advanced HR, many types of benefits have very similar setup. For instance, Medical, Dental, and Vision Benefits utilize much of the same logic, and therefore, are set up very similarly. Short Term Disability plans also share some of the same setup steps. Refer back to the Medical/Dental section for more information on some of the following steps. This section concentrates on the differences in setting up a Short Term Disability plan.

To create a Short Term Disability plan:

- 1. Go to Administration Benefits.
- 2. On the **Plan Dashboard**, click on the **Add** button.

Plan Dashboard								
🛟 Add	🗱 Delete							
	Plan Name	Plan Type	Plan Description	Plan Start Date	Plan End Date			
	T	T	T	- T	- T			
	Cigna - Medical	Medical	Cigna - Medical	01/01/2016	12/31/2016	Copy		
	Cigna - Medical Plus	Medical	Cigna - Medical Plus	01/01/2016	12/31/2016	Copy		
II 4 1	▶ ▶ Page size: 15 ▼					2 items in 1 pages		

3. Select the Plan Type of Short Term Disability (STD).

Plan Type				
What type of pl	an would you like to Create ?			
Plan Type:* Save	Medical	•	1	
Gard	Short Term Disability(STD)			
	Spouse Voluntary Life Vision	Т		
	Voluntary Life	-		

#### 4. Click Next.

Result: The system displays the Benefits setup menu Info tab, with the General Info section displaying.

Info Enro	ollment Admin Matrix	Rates Allocation Display	
General Info			
Plan Type :*	Short Term Disability(STD)	Plan Code :*	STD-1
Plan Name :*	STD-1	Plan Description :*	STD Plan 1
Plan Year Start Date :*	7/1/2016	Plan Year End Date :*	7/17/2021
ERISA Plan Number :		ERISA Plan Year Ending :	
Policy Number :		Group Number :	
Certificate Number :		Funding Type :	Fully Insured
Plan Effective Date :*	Date of Election 👻	Recalculate Age:	Select 👻
Election Type :*	Employee 🔻	Related Plan:	Select 🔻
Deduction Frequency :*	Every Scheduled Pay		

- 5. The General Info section information you enter is similar across all types of Benefit Plans.
- In the Benefit Information section of the Info tab, for Benefit Structure, select Calculated Value, as STD plans generally pay out based on the employee's weekly salary.
   The Cash Out Waiver may be a rebate from the company if the STD is an employer funded benefit and if the

employee opts out of the benefit.

For Rate Structure, select Covered Benefit.



Benefit Information						
Benefit Structure :*	Calculated Value	Dependent Types :	Select	Used for ACA :	©Yes ⊛No	
Rate Structure :*	Covered Benefit 🔹	Termination Coverage:	Select 🔻	Auto Enroll:	◯ Yes ● No	

- 7. Click **Next** to move to the **Enrollment** tab.
- 8. The Enrollment and the Admin tabs are completed similarly as you do for all other Benefit Plans.
  - On the **Enrollment** tab, select if the benefit will require beneficiaries and the date of birth for the Dependents, Beneficiaries, both or none.
  - On the **Admin** page, complete the information about the internal plan administrator, plan carrier and other related plan info.
- 9. Click **Next** to move to the **Matrix** tab. Refer to your policy document to complete the information on the **Matrix** tab.

Info Enrollment Admin Matrix Rates	Allocation Display		
Calculated Coverage Structure			
Standard Coverage formula :			
Coverage : • Weekly 💌	Factor:*	60.00 % Plus:*	\$ 0.00
This Plan has ( Check all that apply ) :			
Min / Max Rules Rounding Rules Fixed Benefit	Cannot Be Waived		
Min / Max Coverage Rules :			
Max based on Employee election amount			
Max Coverage :* \$ 2,500.00	Min Coverage applicable to a	all eligible	
Min Coverage : * \$ 15.00			
Coverage Increment: * \$ 100.00			
Benefit Adjustment Schedule			
Adjustment Factor :Select	•		
Previous Save Exit Next			

- 10. If the policy document specifies the benefit payout in weekly terms, then select **Weekly** from the **Coverage** dropdown field.
- 11. Enter the **Factor**. This is the benefit percentage given in your policy document. It is the percentage of the first stipulated amount of the employee's weekly insured pre-disability earnings, reduced by the deductible income.
- 12. Currently, the **Plus** field is required even though with STD, there might not be a value for this. Enter **0.01** to continue. Note this will be changed to become a non-required field in a future release.
- 13. Select the Min/Max Rules (and possibly Rounding Rules) options and/or Cannot be Waived.
- 14. In the Min/Max Coverage Rules, select the Max based on the Employee Election amount
- 15. Enter the plan maximum benefit (refer to policy document) into the Max Coverage field.
- 16. Enter the plan minimum benefit (refer to policy document) into the Min Coverage field.
- 17. Generally, there shouldn't be a **Coverage Increment** value for an STD plan, but enter a value as this is currently a required field. Note this will be changed to become a non-required field in a future release.
- 18. Click Next to go to the Rates tab.



Info	Enrollment	Admin	Matrix	Rates	Allocation	Display			
Rate Increm	ent:* \$10.00						Frequency:* Monthly •	Factor:* 60.00	5
Covered B	enefit Tiers								
Tier Basis					Min	1	Max	Rate	Smoker Rate
Age	• •				15		99	0.35	0.35
Previou	is Save E	odt Next							

- 19. For **Rate Increment**, the LTD is generally expressed as per \$10 of covered benefit so enter **10** into this text box. If the policy document stated otherwise, enter the value given in the document.
- 20. Generally a monthly cost is the common requirement to display to employees, so select **Monthly** from the **Frequency** drop-down field.
- 21. Enter the factor, which should be normally be **100%** unless the policy document states that this policy should only pay a percentage of the stated Rate.
- 22. Some STD rates are based on age range. If your STD is such, select age from the **Tier Basis** and enter the **Min** and **Max** age, along with the rate for this age range. The rate for Smoker might be different. If it is, enter the **Smoker Rate** (refer to your policy document). If it is not mentioned, it should probably be the same. If you have additional age range, click on the drop-down next to the **Age** drop-down and select **Add Row Below**. Enter the Min, Max, Rate and Smoker Rate for this age range.
- 23. Click **Next** to go to the **Allocation** tab.

Info Enrollment	Admin Matrix	Rates	Allocation	Display			
Contribution Structure							
1. What is the contribution sch	nedule for this plan?						
Contribution Basis :	y Check 🔍 Other						
2. Is the plan contribution pre-	tax or post-tax?						
Tax Contribution :	Pre-Tax		O Post-Tax				
Deduction Codes :	EE Codes					ER Codes	
	Select			•		Select	•
3. What is the cost structure of	of this plan?						
Cost structure :			100 % Employ	yer Paid	100% Employee Paid		
4. Does an adjustment sched	ule apply to this plan?						
Adjustment schedule :			U Te	ext description only			
Previous Save Exit	Next						

24. On the Allocation tab, enter the following allocation details.

- **Contribution Basis** If the cost of the benefit will be applied per paycheck, select this option. If it must be applied in a different frequency, select **Other**, and then select the frequency.
- Tax Contribution: Select if this is a Pre or Post tax benefit.
- **Deduction Codes**: Select the Deduction Codes to be used for the **Employee** (EE) cost and the codes to be used for the **Employer** (ER) cost of the benefit.
- **Cost Structure**: If this benefit will be cost shared by the Employee and Employer, select **Cost Sharing**. If it is not, then select the option of whom should pay for the benefit.
  - This is necessary to determine the Scheduled E/D that will be created when the employee enrolls in this benefit.

- To automatically determine the amount of cost sharing, enter the **Percentage** or **Dollar amount** into the **Employer Cost** OR the **Employee Cost** and click on **Calculate Contribution**. Advanced HR will automatically fill in the Employee and Employer shares based on this amount.
- To manually enter this information, click on the **Manual Adjustment** box and enter the amounts for each of the tiers.
- Adjustment Schedule: If an adjustment schedule exists for this benefit, select the Text Description only option and enter the Adjustment Text.

25. Click **Next** to move to the **Display** tab.

Info	Enrollment	Admin	Matrix	Rates	Allocation	Display	
Display S	ettings						
	n will allow you to c d documents such					ollee. s video and plan ratings.	
Display Te	emplate						
Click on the	e buttons below to	create and each	section. You	ır changes w	ill be displayed i	n the preview section below.	
Plan Info	ormation						
Provide	r Plan Logo		Ad	dd Verbiage			
lcons fo	<u>r plan features</u>		<u>A</u> 0	dd Verbiage			
Add Cor	<u>ntent</u>	Add Content	<u>A</u> (	dd Verbiage			
Add Cor	<u>ntent</u>	Add Content					
Preview							
The Previe	w section displays	your sections. l	Jse the temp	late above to	make changes		
Plan Info	ormation						
STD Pla	an 1						

The **Display** tab will allow you to configure how the Benefit option is displayed to the employee when they are going through open enrollment. You may add the following information:

- Provider Plan Logo and Verbiage about the provider and plan.
- Icons for Plan features if the plan has additional features such as discounted Gym Memberships or chiropractic and massage therapy services.
- The ability to add content and display it during the enrollment process such as Video, URL, or Documents about the plan.

26. Click **Save** once you have finished entering all the Short Term Disability Plan information.

### Setting up a long term Disability Plan in Advanced HR

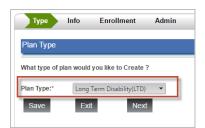
In Advanced HR, many types of benefits have very similar setup. For instance, Medical, Dental, and Vision Benefits utilize much of the same logic, and therefore, are set up very similarly. Long Term Disability plans also share some of the same setup steps. Refer back to the Medical/Dental section for more information on some of the following steps. This section concentrates on the differences in setting up a long Term Disability plan.

To set up a Long Term Disability plan:

- 1. Go to Administration Benefits.
- 2. On the **Plan Dashboard**, click on the **Add** button.

Plan Dasht	Plan Dashboard								
🛟 Add	😂 Delete								
	Plan Name	Plan Type	Plan Description	Plan Start Date	Plan End Date				
	T	T	T						
	Cigna - Medical	Medical	Cigna - Medical	01/01/2016	12/31/2016	Copy			
	Cigna - Medical Plus	Medical	Cigna - Medical Plus	01/01/2016	12/31/2016	Copy			
I 1	► EI Page size: 15 -					2 items in 1 pages			

3. Select the Plan Type of Long Term Disability (LTD).



#### 4. Click Next.

Result: The system displays the Benefits setup menu Info tab, with the General Info section displaying.

Info En	rollment Admin	Matrix	Rates	Allocation	Display	
General Info						
Plan Type :*	Long Term Disability(LTD)				Plan Code :*	StandardLTD
Plan Name :*	Standard LTD				Plan Description :*	Standard LTD
Plan Year Start Date :*	1/1/2016				Plan Year End Date :*	12/31/2016
ERISA Plan Number :					ERISA Plan Year Ending :	
Policy Number :					Group Number :	
Certificate Number :					Funding Type :	Fully Insured 💌
Plan Effective Date :*	Date of Election	•			Recalculate Age:	Select 💌
Election Type :*	Employee	•			Related Plan:	Select 💌
Deduction Frequency :*	Every Scheduled Pay	•				

- 5. In the **General Info** section, enter the relevant information into the fields.
- 6. In the **Benefit Information** section of the **Info** tab, for **Benefit Structure**, select **Calculated Value**, as LTD plans generally pay out based on the employee's monthly salary. Note that the **Cash Out Waiver** option may be a rebate from the company if the LTD is an employer funded benefit and if the employee opts out of the benefit. In the **Rate Structure** field, select the **Covered Payroll** option.



Benefit Information						
Benefit Structure :*	Calculated Value	Dependent Types :	Select 👻	Used for ACA :	⊖ Yes ⑧ No	
Rate Structure :*	Covered Payroll 👻	Termination Coverage:	Select 🔻	Auto Enroll:	⊖ Yes ⊛ No	
NOTE:To Enable plan Assoc	ciation for this plan Please click here					

- 7. Click Next to move to the Enrollment tab. Click Next to move to the Enrollment tab.
- 8. On the **Enrollment** tab, select if the benefit will require beneficiaries and the date of birth for the Dependents, Beneficiaries, both or none.
- 9. On the **Admin** page, complete the information about the internal plan administrator, plan carrier and other related plan information.
- 10. Click **Next** to move to the **Matrix** tab.

Info	Enrollment	Admin	Matrix	Rates	Allocation	Display				
Calculated C	Coverage Struc	ture								<b>^</b>
Standard Cov	verage formula	:								
Coverage : *	Month	y •		Coverage	amount is:*	60.00 %	of earnings	Plus:	\$ 0.00	

11. The above screen shows the portion of the Matrix tab that sets the coverage amount of the LTD. In general, LTD coverage amount is based on a percentage of the employee's monthly salary (please refer to your policy document to ensure that such is the case). Select Monthly from the Coverage dropdown and enter the percentage into the Coverage amount is \_\_\_\_\_ of earnings field.

This Plan has ( Check all t	that apply ) :							
Min / Max Rules	Rounding Rules	Fixed Benefit	Cannot Be Waived					
Min / Max Coverage Rules :								
Max based on Employed election amount	byee							
Max Coverage : *	\$ 5,000.00	Min Coverage ap	plicable to all eligible					
Min Coverage : *	\$ 1,000.00							
Coverage Increment:	\$ 0.00							
Benefit Adjustment Schedule								
Adjustment Factor :	Select	•						
Aujustinent Factor :	>elect	•						
Previous Save	Exit Next							

- 12. The above screen shows the portion of the **Matrix** tab that sets limits. As an LTD policy would generally set a maximum coverage amount (and sometimes a minimum), select the **Min/Max Rules** check box.
- 13. With an LTD policy, the coverage amount is generally fixed (that is, a percentage of their monthly salary, not exceeding the maximum coverage amount), which means that employee will not be able to select a different coverage amount. Select the **Fixed Benefit** check box.
- 14. Select the Min Coverage applicable to all eligible check box, if there is a minimum coverage amount.
- 15. Enter the plan maximum benefit (refer to policy document) into the Max Coverage field.
- 16. Enter the plan minimum benefit (refer to policy document) into the **Min Coverage** field, if applicable.
- 17. Click **Next** to go to the **Rates** tab.



The Rates tab allows you to set up how the rates of the LTD are calculated.

Info Enrollment Admin	Matrix Rates Allocation	n Display		
Per:* \$100.00	Frequency:*	Monthly •	Factor:* 100.00 %	
Covered Payroll Tiers				
Tier Basis	Min *	Max * Rat	e * Smoker Rate *	
Age 💌 💌	0	99 0.3	5 0.35	
Previous Save Exit N	ext			

- 18. The rate for the LTD is generally calculated based on a given rate per \$100 (refer to the policy, if not stated, then \$100 should be used). Enter **100** into the **Per** field.
- 19. In general, AHR calculates rates in monthly term. Select Monthly from the Frequency drop-down field.
- 20. Enter the **Factor**, which should normally be 100% unless the policy document states that this policy should only pay a percentage of the stated rate.

Some LTD rates are based on age range. If your LTD is such, select age from the **Tier Basis** and enter the Min and Max age, along with the rate for this age range. The rate for a Smoker might be different. If it is, enter the **Smoker Rate** (refer to your policy document). If it is not mentioned, it should probably be the same. If you have additional age ranges, click on the **Age** dropdown and select **Add Row Below**. Enter the **Min, Max, Rate** and **Smoker Rate** for this age range.

21. Click **Next** to go to the **Allocation** tab.

Info	Enrollment	Admin	Matrix	Rates	Allocation	Display						
Contribution	Structure											(
1. What is	the contribution	schedule for	this plan?									
Contribution	Basis :	Pay Check 🤇	Other									_
2. Is the pl	an contribution p	ore-tax or pos	st-tax?									
Tax Contribu	Ition :	Pre-	Tax		Post-Tax							
Deduction C	odes :	EE Code	s						ER Codes			
		Select				•			Select		-	1
												5
3. What is	the cost structu	re of this plar	ז?									
Cost structu	ire :				100 % Emplo	yer Paid	100% Employee Paid					
4. Does ar	4. Does an adjustment schedule apply to this plan?											
Adjustment	schedule :				О т	ext description on	ıly					
Previous	Save Exit	Next										
Trevious	Save LAIL	NEX										

22. On the **Allocation** tab, enter the following allocation details.

- **Contribution Basis** If the cost of the benefit will be applied per paycheck, select this option. If it must be applied in a different frequency, select **Other**, and then select the frequency.
- Tax Contribution: Select if this is a Pre or Post tax benefit; in general, LTD is Post-Tax.
- **Deduction Codes**: Select the Deduction Codes to be used for the **Employee (EE)** cost and the codes to be used for the **Employer (ER)** cost of the benefit.
- **Cost Structure**: select an appropriate Cost Structure.

23. Click **Next** to move to the **Display** tab.



The **Display** tab will allow you to configure how the Benefit option is displayed to the employee when they are going through open enrollment. You may add the following information:

- Provider Plan Logo and Verbiage about the provider and plan.
- Icons for Plan features if the plan has additional features.
- The ability to add content and display it during the enrollment process such as Video, URL, or Documents about the plan.

play Settings         as acreen will allow you to customize the Plan information that is displayed to the enrollee.         can add documents such as Plan Details, links to find a doctor, multimedia such as video and plan ratings.         play Template         ext on the buttons below to create and each section. Your changes will be displayed in the preview section below.         Plan Information         Provider Plan Logo       Add Verbiage         cons for plan features       Add Verbiage         Add Content       Add Content         Add Content       Add Content         view	Info	Enrollment	Admin	Matrix	Rates	Allocation	Display	
a can add documents such as Plan Details, links to find a doctor, multimedia such as video and plan ratings.    play Template   play Template   cik on the buttons below to create and each section. Your changes will be displayed in the preview section below.   Plan Information   Provider Plan Logo   Add Verbiage   cons for plan features   Add Content   Add Content   Add Content   Add Content   Add Content   Add Content   View	splay Set	tings						
ck on the buttons below to create and each section. Your changes will be displayed in the preview section below.   Plan Information   Provider Plan Logo   Add Verbiage   cons for plan features   Add Content   Add Content   Add Content   Add Content   Add Content   Add Content   View	is screen u can add	will allow you to documents suc	customize the F h as Plan Detail	Plan informations, links to find	on that is dis a doctor, mu	played to the en Itimedia such a	rollee. s video and plan ratin	gs.
Plan Information Provider Plan Logo Cons for plan features Add Content Add Content Add Content Add Content Add Content Add Content Preview section displays your sections. Use the template above to make changes. Plan Information Plan Informatio								
Provider Plan Logo       Add Verbiage         cons for plan features       Add Verbiage         Add Content       Add Content         Add Content       Add Content         Add Content       Add Content         View       Verbiage			create and eac	h section. You	ur changes w	ill be displayed	in the preview section	n below.
cons for plan features       Add Verbiage         Add Content       Add Content         Add Content       Add Content         Add Content       Add Content         View	Plan Infor	mation						
Add Content     Add Content       Add Content     Add Content         Add Content     Add Content         view         Preview section displays vour sections. Use the template above to make changes.	<u>Provider F</u>	Plan Logo		A	dd Verbiage			
Add Content Add Content  View  Preview section displays your sections. Use the template above to make changes.  Plan Information	lcons for p	<u>plan features</u>		A	dd Verbiage			
view Preview section displays your sections. Use the template above to make changes. Plan Information	Add Conte	<u>ent</u>	Add Content	A	dd Verbiage			
Preview section displays your sections. Use the template above to make changes.	Add Conte	<u>ent</u>	Add Content					
Plan Information	eview							
	e Preview	section display	s your sections	Use the temp	plate above t	o make changes		
Standard LTD	Plan Infor	mation						
	Standard	LTD						

24. Click **Save** once you have finished entering all the Long Term Disability Plan information.

#### 25. Click Exit.

The system returns you to the Plan Dashboard screen showing the plan you just created.

Plan Dash	board					
💠 Add	Selete					
	Plan Name	Plan Type	Plan Description	Plan Start Date	Plan End Date	
	T	T	T			
	Cigna - Medical	Medical	Cigna - Medical	01/01/2016	12/31/2016	Copy
	Cigna - Medical Plus	Medical	Cigna - Medical Plus	01/01/2016	12/31/2016	Copy
	Standard LTD	Long Term Disability(LTD)	Standard LTD	01/01/2016	12/31/2016	Copy
	<u>STD-1</u>	Short Term Disability(STD)	STD Plan 1	07/01/2016	07/17/2021	Copy
[	▶ ▶ Page size: 15 ▼					4 items in 1 pages

# Copying a benefit

Advanced HR allows users to copy a benefit to save time when entering multiple benefits that are similar.

To copy a benefit:

1. On the **Administration – Benefits** screen, click on **Copy** next to the benefit you want to copy.

🏳 A	dd 😂 Delete					
	Plan Name	Plan Type	Plan Description	Plan Start Date	Plan End Date	
	T	T	T			
	<u>Dental</u>	Dental	Dental	06/01/2016	05/31/2017	Copy
	HMO - High	Medical	HMO - High	06/01/2016	05/31/2017	Copy
	HMO - Low	Medical	HMO - High	06/01/2016	05/31/2017	Copy
	Vision	Vision	Vision	06/01/2016	05/31/2017	Copy

2. Enter in the name and the plan type.

Сору		×
PlanName*	PlanType*	
HMO - Low	Medical	•
Save Cancel		

- 3. Click on Save.
- 4. Click on the Copied Plan Name to edit any specific information about the plan.

**Note:** iSystems recommends reviewing each screen to ensure that the benefit plan is accurate.

# Setting enrollment

There are three (3) types of enrollment that may occur in Advanced HR. These are:

- Open Enrollment
- New Hire Enrollment
- Life Status Change Enrollment

In this section, you will learn how to configure Advanced HR for these types of Enrollment.

The first step in using Advanced HR for benefit enrollment is to set up Waiting Periods, Eligibility Groups, and Benefit Classes.

Waiting Periods are typically used for New Hire enrollment, to allow for the company to offer a benefit to begin after a certain period of time from the employees Date of Hire, however these can be assigned to different periods as well.

The Eligibility Group, and the Benefit Class work together to allow only employees who meet the criteria of the Eligibility Group, and are assigned to a Benefit Class, the ability to enroll in their specific available benefits.

### Waiting Period

To create the Waiting Period:

- 1. Go to Administration Waiting Periods.
- 2. Click on Add.
- 3. Enter the following information:
  - Name Enter a name for this Waiting Period.
  - **Start** Enter the number of days after the Time Frame to begin Enrollment.
  - End Enter the number of days after the Time Frame to end Enrollment.
  - **Time Frame** Select **Date of Hire**. This is the time frame from which the Start and End days will be counted.

Add New Waiting Period						
Name:*	New Hire Period					
Start :*	30 Days					
End :*	60 Days					
Time Frame:*	Date of Hire(DOH)					
Save	Cancel					

**Setup Information:** Additional Time frames can be added in Setup – Default Table Setup – Benefits – TimeFrame.

4. Click **Save** when complete.



### **Eligibility Group**

To set up an Eligibility Group:

- 1. Go to Administration Eligibility Groups.
- 2. Click on Add.
- 3. Enter the **Name** of the Eligibility Group.
- 4. In **Eligibility Criteria**, you can define specific information about what qualifies an employee assigned to this group.
  - You may define a Hire Date range.
  - Age Range.
  - Hours Worked.
  - If smokers will be included.

	Eligibility Criteria:		
	Date Hired Between:		
C	Age:	(low to )	(high to ) (example : 18 to 65)
	Hours worked:	(low to )	(high to ) (example : 20 to 40)
	Smoker:		

- 5. In the next section, select additional criteria for eligible employees.
  - Employment Status
  - Employment Type
  - And the Country or Region

Include the following :		
Employment Status	Employment Type	Country/RegionSelect
Active	1099	Jerect
FMLA	W-2	
Involuntary Layoff		
Involuntary Termination Due To Misconduct		
Jury Duty		
Leave Of Absence		
Save Cancel		

6. Click **Save** when complete.

### **Benefit Class**

Next, the Benefit Class must be created. To create the Benefit Class(es):

- 1. Go to Administration Benefit Classes.
- 2. Click the **Add** button.
- 3. Enter the **Class Name**.
  - a. Example Full Time Employees, Executive, Part Time, etc....

Add a New Benefit Class					
Class Code:	D				
Class Name:*					
Save Cancel					

4. Click **Save** when complete.

Note: Separate Benefit Classes should be set up for General Open Enrollment and for New Hire Enrollment.

#### **Employee assignment**

Now that the Waiting Periods, Eligibility Groups, and Benefit Classes are set up, the Benefit Class must be assigned to the Employees to prepare for Open Enrollment and/or New Hire Enrollment.

In Advanced HR, if the company is NOT Position Enabled, then to assign the Benefit Class:

- 1. Go to the **Employees Employment** tab.
- 2. Select the **Benefit Class** from the drop-down list in the Employment Profile Form.
- 3. Click **Save** to continue.

Ċ	Home > Employees > Er	mployment	
Prev	vious Employee	Employee : Abigail Brown–23	9
E	mployment Pay	Worker's Comp Discipline Points FMLA/LEAVE	
	Employment Profile		
	Change Reason:	Select	
	Status:*	Active	
	Туре:	Select	
	Employee Number:	23	
	Job Title:*	Trainer	
	Job Cost Number:	Select	
	Training Track:	Track One	
	Benefit Class:	Full Time Employee	
	Job Class:	Select 🔻	
	FLSA Exempt :	No	
	Work Phone:	(802)566-8524 Ext	
	Work Email:*	notindicated@unknown.com	
	Badge Number:		
	OK to Rehire:	8	

If the Company IS Position Enabled, the Benefit Class is assigned to the Compensation Profile. To assign the Benefit Class to the Compensation Profile:

#### 1. Go to Administration – Compensation Profiles.

2. In the **Action** column for the profile, click on **Edit**.

Positions: Compensation Profile												
S.No	Title	Wage Type	Wage Unit	Wage Amount	Commissions	Bonus	Benefit Group	Stock	Other Cash Comp	PTO Plan	Other Benefits	Action
1	Administrative Assistant		Year	\$45,000.00	\$0.00	\$0.00	Full Time Employee		1200.00	Full Time Employee		•
2	Farm Hand		Hour	\$25.00	\$0.00	\$0.00	Full Time Employee		0.00			•

- 3. In the Variable Plan section, assign the Benefit Group (Benefit Class).
- 4. Click **Save** to continue.

# Open Enrollment and New Hire Enrollment

Open Enrollment typically happens in companies 1 - 2 times per year, depending on the Benefit Structure. When Open Enrollment occurs, Employees who are eligible to receive benefits can log into the Employee Portal and select and/or waive benefits while enrollment is occurring. This eligibility is based on the Eligibility Groups and Benefit Classes that were set up and assigned to the employees in the previous section of this chapter.

New Hire Enrollment can happen at any point when new employees are hired into the company. Waiting Periods are set up and defined to allow Companies to have Enrollment happen after a certain period of time has passed from when the employee was hired.

Open Enrollment and New Hire Enrollment can be set up for one or multiple Benefit Classes to run at the same time. Prior to Open Enrollment being set up, the following requirements must be met:

- 1. Benefit Plans must be created.
- 2. Waiting Periods must be defined.
- 3. Eligibility Groups must be created.
- 4. Benefit Classes must be created and assigned to Employees or, if Position Enabled, the Compensation Profiles.

**Note:** Separate Benefit Classes can be created for separate Employee Types. For example, if the Executive level employees are offered a different set of benefits, create a Benefit Class specific to those employees.

Once all of the requirements have been completed, you are ready to begin setting up an Open Enrollment Period.

To set up the Open Enrollment period:

- 1. Go to Administration Benefits Benefit Classes.
- 2. Click on the name of the **Benefit Class** for which Open Enrollment will be set.
- 3. Click on the Orange Plus sign to Add a new Open Enrollment Period.
- 4. Enter a **Name** for this Open Enrollment Period.
- Enter the Start and End date of the Open Enrollment Period.
   Note: These are the dates that Enrollment will be open and employees will be able to Enroll.
   For New Hire enrollment, this could be the entire Plan Year.
- 6. Select the **New Hire** option if this Enrollment Period is being set up for New Hire Enrollment.

**Note:** Do not select the New Hire option for General Open Enrollment. Separate Enrollment Periods should be set up for New Hire Enrollment.

7. Click **Save** when complete.

Result: Open Enrollment Period is saved. The User can now add Benefit Plans to the Open Enrollment Period.

- 8. Click on the Blue Plus sign to Add a New Plan.
- 9. Select the Plan Name, Eligibility Group, and Waiting Period for this plan.
- 10. Click on Save.
- 11. Repeat steps 7-9 until all plans that should be available during this enrollment are listed.
- 12. Repeat steps for All Benefit Classes that require Enrollment Periods.

## Enrolling employees using the Employee Portal

Employees have the ability to enroll in Benefit Plans directly from their Employee Portal site. It is important, however, to verify that the **Employee Role** within the company allows for this. From the **Setup – Security – Manage Roles** screen, define the buttons that appear on the **Employee Portal** from the **Portal View** tab.

Role Name :*	Employee							
Description (Optional) :	Employee role to manage self - serv	ice access.						
	-		11					
This role has access to the following Sec	ction :							
Copy access from an existing role :	Administrator	•	Сору					
	Enable Advanced HR Iton     Enable SAN testesting							
Show Org Chart     Human Resources	Payroll	Communication	Administration	Reporting	Utilities	Setup	Portal View	

Human Resources	Payroll Communication Administration	Reporting Utilities Setup	Portal View	
Section	User Actio	ns		Field Level Access
🗹 Payroll				
Benefits				
Expenses				
My Info				
Documents				
Talent Management				
🗹 Chat				
🗹 sso				
InfoBlock				
This security role applies to				
<ul> <li>All Active and InActive En</li> <li>Only direct reports</li> </ul>	nployees			
Employees from the follow	ving:			
Employee Only				
Save Cancel				

Once the desired buttons are activated for the role, click Save.

Evolution<sup>®</sup> Advanced HR

Logging into the Employee Portal, the user should notice that the tiles along the right side of the screen correspond with the buttons that were selected in the **Setup – Security – Manage Roles** screen.

for Groups Discussions		gail 🐌
	🔕 Tasks 👩 Messages	≎ ≡
Community Announcement	Friend Activities Vorkspace	Payroll
There are currently no announcements. Community Activities	Benefits	Expenses S
Convince Expension     updated profile     Zors report	My Info	Documents
Ad Connet	Talent	
A Algod Isone 88	Activit	

Clicking on the **Benefits** tile, the employee will be taken to the **Current Benefits** screen. Current Benefits, Enrolling in Benefits, and People (Dependents/Beneficiaries) are all accessible from this screen.

Groups Discussions							Hello, Al	bigail	
							3 Tasks	0 Messages	⇔ ≡
Current	Enroll	People						Workspace	Payroll
Current Benefits						Total Per Mo	onth: \$422.87	Benefits	Expenses
							check \$195.17	•	5
Cigna - High Deductible det		details Cigna - Vision	details	Voluntary Life	details	401K	details	My Info	Documents
564	.87	\$13.07	\$1.85	aetna Coverage 1/1/2016 to 12/31/2016	\$115.38	John Hancock	Employer	Talent	
Cigna.	Cigna.	Cigna		Employee \$10,000.00		Junioning			
EE \$25.56	EE \$5.00	EE \$4.00							vities
EE + Children \$140.55 EE + Spouse \$166.06 EE + Family \$281.10	EE + Children \$15.15 EE + Spouse \$12.80 Family \$23.32	EE + 1 \$6.00 Family \$10.00							∾ vities
Print									

Selecting the **Enroll** tab, the user is taken to the **Enroll in Benefits** screen. The employee can select **New Hire Enrollment, Life Status Change**, or **Open Enrollment**. Clicking on the **Open Enrollment** link, the user is taken to the Benefits Enrollment Wizard. This wizard is very similar to what was seen in previous steps.

f Groups Di	scussions	Hello, Abigail
		3 Tasks 🧿 Messages 🔅 🗮
Current	Enroll People	Workspace Payroll
Enroll in Benefits		Benefits Expenses
Eligibility is closed unless y	ou have a Life Status Change or during an Open Enrollment period.	÷ 5
New Hire Enrollment	Not Available	My Info
Life Status Change	Make a Life Status Change	Talent
Open Enrollment	Open Enrollment 1/1/2015 to 12/31/2016	
		Activities



The Benefits Enrollment Wizard will walk the employee through the enrollment process. Clicking **Let's Get Started** will start the enrollment process. In this example, we will use a Cigna High Deductible Medical Plan:

đ	Groups Discussions		Hello, At	oigail
		3 Tasks	6 O Messages	⇔ ≡
	Current Enroll People	Ì	Workspace	Payroll
E	Enroll in Benefits		Benefits	Expenses
	Welcome to the online benefits enrollment system.		•	5
	You will go through three easy steps to select your benefits. Step 1. Verify your information. Here you will review your information and that of your dependents. You can make changes to any existing records or add a new dependent.		My Info	
	Step 2. Make your elections. In the second step you will be presented with a set of plan categories. Click on a plan to see the details and select coverages. A summary of the plans you enroll in will be displayed so that you can track your progress. You muse week here they of plan category before you can proceed to the final step.	ist elect or	Talent	
	Step 3. Review you elections.			
	If you want to make changes you can go back, but if you are satisfied with your selections, then click submit. That's all. You are done!		Activ	
	Let's Get Started		U U	~

1. Verify and or edit information:

f Groups Dis	cussions						Hello, Abigail
						3 Task	is 🧿 Messages 🔅 🗮
Current	Enroll	People					Workspace Payroll
Enroll in Benefits						My Elections	Benefits Expenses
Step 1: Let's review your i	nformation.						My Info
Name Abigail May Brown			SSN	443-27-6316			Talent
Address 44 Mechanic Street			Gender Birth Date	Female 8/16/1957			
Shelburne Vermont 05401			Marital Status	Single			Activities
Edit Personal							

2. Verify and/or edit dependents and beneficiaries:

Step 2: Veri	ify your dependents and benef	îiciaries.			
	Name	Relationship	Date of Birth	Dependent	Beneficiary
246	Brown, Mary	Step-Child	3/4/1993		
Add Dep	pendent				
					Select My Plans

3. Click **Select My Plans.** The **Enroll in Plans** screen opens to show the different benefit options for the employee:



f Groups Disc	cussions									Hello, Abigail
Current	Enroll	People							3 Tas	ks O Messages 🌣 ≡ Workspace Payroll
Enroll in Plans My Info Medical Den	tal Vision Voluntary Life	401k					Cost per p	aycheck \$195.17	Finish	Benefits Expenses
Medical Cigna - High Deductible Cigna.	details (64.87) Gigna - Low Deductible Cigna.	Waive	Dental Gigna - Dental Cigna.	Waive details \$13.07	Vision Ggna - Vision Cigna.	Waive details \$1.85	Voluntary Life Voluntary Life <b>Bettna</b> Coverage 1/1/2016 to 12/31/20 Employee 510,000.00	Waive details \$115.38	1	My Info Talent Activities
EE \$25.56 EE + Children \$10.55 EE + Spouse \$106.06 EE + Family \$281.10	EE \$12.28 EE + Children \$122.53 EE + Spous \$147.32 Family \$257.80 Deductible: \$1,500 / \$3,000 Contenzance: 80% Office Copay:: \$30 / \$60		EE \$5.00 EE + Children \$15.15 EE + Spouse \$12.80 Family \$27352	o	EE \$4.00 EE + 1 \$6.00 Femily \$10.00	0		0		A

4. Selecting a desired plan and coverage level will give a summary of the election:

1: Select the desired Cover ts shown are per month, a p		e shown on the summary	after election.	
	EE	EE + Children	EE + Spouse	EE + Family
	\$25.56	\$140.55	\$166.06	\$281.10
2: Select your dependents:				
Name	R	elationship	Include	Qualification
Brown, Mary	Step-Child			Select Qualification 🔻

- 5. The employee has the option to **Enroll in the Plan** or to review another plan. After enrolling in a benefit plan, the user's selection will appear on the screen.
- 6. When all elections are complete, click the **Finish** button:

Cu	urrent	Enroll	People
Enroll in	n Plans		
My Info	Medical De	ntal Vision Voluntar	y Life 401k

7. The user can Review and Submit their Elections. Scroll to the bottom of the screen and check I have read and agree with the TERMS listed above and click Submit:



Groups	<ul> <li>Discuss</li> </ul>											
Group	5 Discuss										Hello, A	
									•	Tasks	Messages	Q
Current		Enroll	People								Workspace	1
iew and Sul	bmit your Ele	ections									Benefits	Б
info My El	lections										•	
se review your benef	ur Benefit Election fit elections for accura		isted below and represent your benefit	t elections for the Upcoming plan y	year . If you find a disc	repancy, you cannot make a	ny changes unless you experience a	qualifying event such as birth of a child	or marriage .Consult	Т	My Info	Do
an Resources for fur aployer sponsor	red pre-tax Bene	fit Elections									Talent	
loyer sponsored pre	e-tax Benefit Elections	s are deducted from you	ur payroll prior to deduction of withhole	ding tax.							<u>ب</u> ت	
/pe	Provider		Plan		Coverage Level		Effective Date	Monthly Rate				
edical sion	Cigna		Cigna - High Deductible		EE + Children		01/01/16 01/01/15		\$140.55 \$4.00		Acti	vitie
ion ntal	Cigna Cigna		Cigna - Vision Cigna - Dental		Family		01/01/15		\$4.00			$\wedge$
11k	John Hancock	C.	401K		Single		01/01/16		\$0.00			
									Total : \$172.87			
	x Benefit Electior afit elections are dedu	ction from your payroll Provider	after deduction of withholding tax.	Coverage Level		Effective Date		Monthly Rate				
		Aetna	Voluntary Life	Employee		pending Approval of EOI			\$1,912.50			
oluntary Life	vour Depender	Aetna	Voluntary Life	Employee Employee		pending Approval of EOI 01/01/2016			\$1,912.50 \$250.00 Total : \$250.00	v		
iuntary Life		Aetna nt & Beneficiary	Voluntary Life	Employee	. If you need to go b	01/01/2016	use the navigation above to up	idate the selected benefit .	\$250.00			
oluntary Life		Aetna nt & Beneficiary	Voluntary Life / Information Make sure that all dependents yo	Employee	. If you need to go b	01/01/2016	use the navigation above to up Beneficiary	date the selected benefit .	\$250.00	v		
p 2: Review y se review your De me		Aetna nt & Beneficiary ficiary Information .	Voluntary Life / Information Make sure that all dependents yo PI	Employee		01/01/2016		date the selected benefit .	\$250.00			
p 2: Review y se review your De me ary p 3 : Submit : ccepting this infor	your Elections mation, I authorize the changed until	Aetna Int & Beneficiary Information . Relationship Step-Child I the next open enrol	Voluntary Life ( Information Make sure that all dependents yo	Employee ou have are correctly covered, an tedical, Vision	Deper Ø	01/01/2016	Beneficiary	idate the selected benefit .	5250.00 Total : \$250.00			
ame lary ep 3 : Submit accepting this infor see elections canno I have read and	your Elections mation, I authorize the changed until agree with the TEI	Aetna It & Beneficiary Information . Relationship Step-Child It e the elections above RMS listed above .	Voluntary Life / Information Make sure that all dependents yo P P e along with any payroll deduction liment period unless a change in 1	Employee but have are correctly covered. an fredical, Vision ins required for these elections status occurs .	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
Juntary Life	your Elections rmation, I authorize the changed until agree with the TEI BOX AND ENTERIN NFORMATION I HA	Aetna nt & Beneficiary ficiary Information . Relationship Step-Child : t the elections above the next open enrol RMS listed above . IG MY NAME BELOW	Voluntary Life  V Information  Make sure that all dependents y  P  B  e along with any payroll deduction	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
p 2: Review y p 2: Review y se review your De me my p 3 : Submit p 3 : Submit p 3 : Submit i have read and CHECKING THE IA CHECKING THE IS Signature Inform	pendent and Bene your Elections mation, I authoriz to be changed until agree with the TEI BOX AND ENTERIN NFORMATION I HA mation	Aetna nt & Beneficiary ficiary Information . Relationship Step-Child : t the elections above the next open enrol RMS listed above . IG MY NAME BELOW	Voluntary Life Voluntary Life VInformation Make sure that all dependents yc PI P R e along with any payroll deduction timent period unless a change in 1 I AM INDICATING MY INTENT T	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
p 2: Review y p 2: Review y se review your De me ry p 3 : Submit ccepting this info se elections canno il have read and CHECKING THE II Signature Inform Lick Signed 97-k1	your Elections mation, I authoriz agree with the TEI BOX AND ENTERIN NFORMATION I HA <b>mation</b> Digall Brown	Aetna nt & Beneficiary ficiary Information . Relationship Step-Child : t the elections above the next open enrol RMS listed above . IG MY NAME BELOW	Voluntary Life Voluntary Life VInformation Make sure that all dependents yc PI P R e along with any payroll deduction timent period unless a change in 1 I AM INDICATING MY INTENT T	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
p 2: Review y p 2: Review y se review your De me my p 3 : Submit cocepting this infor cocepting this infor electrons cannot f 1 have read and f 1 have read and f 1 deverse Infor Signature Infor Click Signed By:Ak	your Elections rmation, I authorize the changed until agree with the TEI BOX AND ENTERIN NFORMATION I HA <b>mation</b> bigail Brown n	Aetna nt & Beneficiary ficiary Information . Relationship Step-Child : t the elections above the next open enrol RMS listed above . IG MY NAME BELOW	Voluntary Life Voluntary Life VInformation Make sure that all dependents yc PI P R e along with any payroll deduction timent period unless a change in 1 I AM INDICATING MY INTENT T	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
p 2: Review y p 2: Review y se review your De me ry p 3 : Submit i Lave read and CHECKING THE II AT ALL OF THE II Signature Afrom Click Signed By:Ak Signature Afrom	your Elections rmation, I authorize the changed until agree with the TEI BOX AND ENTERIN NFORMATION I HA <b>mation</b> bigail Brown n	Aetna nt & Beneficiary ficiary Information . Relationship Step-Child : t the elections above the next open enrol RMS listed above . IG MY NAME BELOW	Voluntary Life Voluntary Life VInformation Make sure that all dependents yc PI P R e along with any payroli deduction timent period unless a change in 1 I AM INDICATING MY INTENT T	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
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Induntary Life In the set of th	your Elections mation, I authorize to be changed until agree with the TEI BOX AND ENTERIN NFORMATION I HA <b>mation</b> 5	Antra nt & Beneficiary Information . Relationship Step-Child it the elections above the next open error RMS listed above . RMS listed above . RMS listed above . New PROVIDED IS TH	Voluntary Life V Information Make sure that all dependents yy P P e along with any payroll deduction liment period unless a change in t J I AM INDICATING MY INTENT T SUE, COMPLETE, AND ACCURATE	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		5250.00 Total : \$250.00			
p 2: Review y p 2: Review y se review your De me any p 3 : Submit c 3: Submit c 4: Submit c 4: CHCKING THE I Signature Infor CircleCKING THE I Signature Infor CircleCKING THE I Signature Infor CircleCKING THE I Signature Infor	your Elections mation, I authorize to be changed until agree with the TEI BOX AND ENTERIN NFORMATION I HA <b>mation</b> 5	Antra nt & Beneficiary Information . Relationship Step-Child it the elections above the next open error RMS listed above . RMS listed above . RMS listed above . New PROVIDED IS TH	Voluntary Life V Information Make sure that all dependents yy P P e along with any payroll deduction liment period unless a change in t J I AM INDICATING MY INTENT T SUE, COMPLETE, AND ACCURATE	Employee Du have are correctly covered. an tedical, Vision ns required for these elections status occurs . O ELECTRONICALLYSION ANI	s. Under HIPAA, faik	bill01/2016 back and make a change ident	Beneficiary		pblity.			

8. The newly enrolled benefits will appear on the **Current Benefits** screen in the Employee Portal once the Administrator has approved and enrolled the Employees benefits.

## Employee Benefits Election screen - Hide/Show Closed Elections option

The **Employee Benefits Elections** screen has a **Hide / Show Closed Elections** option. The default is to have the Closed Elections not display on the screen – the **Show Closed Elections** option displays instead. This both improves the performance of the loading of the screen and makes it more usable by not displaying the Closed Elections by default, but also provides the user with the option to display the Closed Elections, if required.

#### Show Closed Elections option unselected (this is the default)

Evolution <sup>®</sup> Advanced HR		Company : ESSTest-ESSTest		×
Employees   Payroll   Communication	ns   Expenses   Administration   Reportin	ng Utilities Setup		
C Home > Administration > Denefits > Emp	ployee Benefit Elections			-Type to Search-
Benefit Elections report Manually run service	pdate to Payroll	ns		
Employee Benefit Elections (Right click	k column headers to add/remove fields)			
Name	Plan Name	Plan Type	Enrolment Date	Enroiment Status
T	Y	T	ΞY	T
EmpBenefit1316 Benefit321	Dependent Voluntary Life1	Dependent Voluntary Life	07/04/2016	Completed
riti ws	401K	401k	07/12/2016	Completed
riti ws	Pension enrol	Pension	07/12/2016	Completed
Benefit123 Benefit123				Started
terry A	1			Started
EmpBenefit1316 Benefit321				Started
kayur verma				Started
Marya M				Started
riti wa				Started
Emila J				Started
IK K 1 ► H Page size: 50 ▼				

#### Show Closed Elections option selected

Home > Administration > Benefits	> Employee Benefit Elections			-Type to Search-	Advanced Search	My Saved Searches
Benefit Elections report Manually run service	Update to Payroll Show Close	d Elections				
Employee Benefit Elections (Right	click column headers to add/remove fields)					
Name	Plan Name	Plan Type	Enrollment Date	Enrollment Status	Coverage Level	Action
Putin Test	Dental1	Dental	08/19/2016	Completed	EE	Select 🔻
Kochi S	Dental1	Dental	08/30/2016	Completed	EE	Select 💌
Simpson 2 Won	Dental1	Dental	08/10/2016	Closed	EE	Select
Stephen Zenlea	Dental1	Dental	08/10/2016	Closed	EE	Select
Tushar1 Patel1	401k	401k	08/10/2016	Closed	Single	Select ~
noriA	Dental1	Dental	08/10/2016	Closed	EE	Select
Putin Test				Started		Select 🔻
Kochi S				Started		Select 💌
Simpson 2 Won				Started		Select 💌
Stephen Zenlea				Started		Select 💌
If f 1 P H Page size: 50	•					14 items ir

# Benefit Enrollment Status Report

A Benefits Enrollment Status report is available from the Employee Benefits Election dashboard to display to the user the results of a batch enrollment; which enrollments failed and why. This will provide the user with improved information concerning what to do next. Previously, if an enrollment failed, the process came to a stop and the system did not continue with the subsequent enrollments.

After the user clicks on the **Update to Payroll** button on the **Administration** – **Employee Benefits Election** screen, the system runs the batch enrollment. When completed, the system displays a dialog box with the results, such as shown to the right.

5 elections su	cceeded, 2	? failed	
See a	report	Close	
See a	report	Close	

The user can click the **See a report** button to display the Benefit Enrollment Status Report to get more details about the batch enrollment. An example is shown below.

Employee	Benefit	Enrollment Status	Run Date
Aliya Martell #ID: 001	#7008 Vision	Failed	8/12/2016 1:46:45 AM
	#7009 401k	Closed. Plan doesn't require any Payroll Deductions to be created	8/12/2016 1:46:45 AM
Lo Alex #ID: 986745122	#6997 Dental	Closed And Updated To Payroll	8/12/2016 1:46:21 AM
	#6998 Vision	Closed And Updated To Payroll	8/12/2016 1:46:32 AM
	#6999 401k	Closed. Plan doesn't require any Payroll Deductions to be created	8/12/2016 1:46:32 AM
	#7000 Roth IRA	Closed And Updated To Payroll	8/12/2016 1:46:43 AM
	#7001 Long Term Disability(LTD)	These plans have no E/D's assigned to them	8/12/2016 1:46:43 AM

The Benefit Enrollment Status Report includes the following: Employee Name, Plan Name, Employee Code, the Enrollment Status and the Run Date. The following Enrollment Status will display:

- **Closed and Updated to Payroll** Displays when the system receives a Scheduled E/D successfully filed message from Payroll. This counts as Succeeded.
- **Closed**. **Plan doesn't require any Payroll Deductions to be created** Displays for plan types that are not currently integrated. This counts as Succeeded.
- Failed Displays when the system received an exception from Payroll; it was unable to create the Scheduled E/D code. This counts as Failed.

# Chapter 11: The Employee Portal

Companies seeking to provide a seamless integration of human resources administration will appreciate the ease and convenience of communicating via a web accessible portal. Employees are enabled to make their changes to "paperwork" via an interface that then is automatically sent to the appropriate staff for approval.

# Using the Employee Portal

The employee portal is divided into a number of sections, and may include: Community Announcements, Activity Feeds, and icons for Employee screens. There are also social areas for Groups and Discussions, and a section to review a company directory.

The Employee Portal can be configured to allow sections of content for the employees. Content such as Employee Profile, Benefits, and Talent information can be configured for employee review. The following sections are outlined in this section of the user guide:

- My Info
- Payroll
- Documents
- Benefits
- Training
- Payroll

Subsections of certain sections can be enabled or disabled. For example, you may want to enable the "My Info" page, but disable direct deposit information. The portal can also be customized to include company specific items, company announcements, widgets, etc.

### Logging into the Advanced HR Employee Portal

1. To log into Advanced HR, open a web browser and navigate to the Advanced HR login site. Users will need to be provided with the Advanced HR URL.

Username: Password:		Forgot Your Password2
	Sign In	
	By signing in, you agree to our Privacy & Security Policy. © 2015 ISystems LLC. All rights reserved. Version 1.0.1347.0	

- 2. Enter your Evolution **Username** and **Password** in the fields provided. Credentials are the same that were used to access Evolution.
- 3. If you forget your password, click on the **Forgot your password?** link and supply the system with your **Username**. The system will email you a link to create a new password.



		×
Pleas Username:	Forgot your password? ee click submit and a new password will be sent to your email.	
	Submit	
A new p	assword has been sent to your email.	
	Close	
Note : our emails	are being sent from advancedhr@evolutionhcm.com and you may want to add thi address to your list of safe senders to prevent it being marked as Spar	

4. Once you've signed in, the system takes you to the Employee Portal.

Groups Discussions	Helio, Nicole
	🧿 Tasks 🔞 Messages 🔅 🗮
Community Announcement	Friend Activities
There are currently no announcements.	Benefits Expenses
Community Activities	
Add Comment.	My Info
Add Comment.	Talent
Nicole Learner     Service     Vicole Theorem     Vicole Cheerie     Vicole Cheerie     Vicole How's things in the new office?     Hey Nicole. How's things in the new office?	Activities
Add Comment.	
Add Comment	
Page 1 of 3 Tool Items 11	

The employee portal is divided into a number of sections, and may include: Community Announcements, Activity Feeds, and icons for Employee Screens. There are also social areas for Groups and Discussions, and a section to review a company directory.

To navigate through your employee information, click on a tile icon on the right side of the screen.





**Note:** There may be fewer icons based on the number of modules your company chooses to utilize in Advanced HR.

## My Info

Click **My Info** to get an account of your primary employee information. Information, such as job and pay, personal, license, citizenship, taxes, and direct deposit, will appear in the **My Info** section.

fa Grou	ips Discussions					Hello, Abigail
					3 Task	s 🧿 Messages 🔅 🚍
About Me		Abigail May Brown HR Assistant at JS Shelburne Inn &a Employee ID: 23 Username: ABrown Manager: Mgan Forsyth Email: jscoble@evolutionhcm.com Phone: 802566524 Address: S47 Shelburne Road Shelburne, Vermont, 05444 USA	mp; Shoppes since 09/01/201 Pay Type: Salay Pay Frequency: BI-Weekly Compensation: \$25,500.00/Year Last Pay Raise: 10/02/2015 Next Review: 10/02/2015	4	Edit	Workspace     Payroll       Benefits     Expenses       My Info     Documents       Talent     Talent
					Euit	
Personal Date Of Birth: SSN: Ethnicity:	8/16/1957 XXX-XX-6316 Black Or African American	Taxes Federal Withholding Status: Single Exemptions: 0		Driver's License Number: 467899980 State: Vermont Expires: 6/3/2015		Activities
Marital Status: Email: Home Phone: Cell Phone: Provider Type: Address: Emergency Contact	Single jscoble@evolutionhcm.com 8025668524 6154787449 Verizon 44 Mechanic Street Shelburne, Vermont, 05401 ts. Anthony Brown	Addt'l withholdings:		Citizenship A Citizen or national of United States	Ţ	

If editing capabilities are enabled, you can click the **Edit** button to modify data on your record. Click **Edit** to modify data such as name, address, and emergency contact information. All fields marked with a red asterisk (\*) are required and must be completed.

Once you are finished with editing the record, click **Save** at the bottom of the screen to accept the changes. If employee edits require workflow approval (configured in **Setup – Manage Roles**), the system administrator(s) will receive an email with the update request.



To edit your employee photo, click the **Edit Photo** hyperlink under the photo area in the **My Info** section.

Click the **Choose File** button to upload the photo file. Use the File Upload window to navigate and select the photo. Click **Save** to save the photo to your profile. Your photo will now appear on the **My Info** screen, as well as in the **Groups and Discussions** areas of the system.

You can also modify your password by clicking the Change Password hyperlink in the My Info

section as well.

## Payroll

Allows employees access to view Payroll Information such as Pay History, Tax Documents, and Direct Deposit information can be displayed in the Payroll section of the portal.

The **Pay History** tab allows employees to view and download a copy of paystubs and displays checks in PDF format by Check Date.

Payroll					
Pay History	Tax Documents	Direct Deposit			
Pay History					
Years available : 2016	۲				
04/29/2016	C	heck Date	Download PDF	Download PDF	
04/29/2016			Download PDF		

Similarly, the Tax Documents tab is sorted by year and displays W-2 and other tax documentation.

Payroll		
Pay History	Tax Documents	Direct Deposit
Tax Documents		
Years available : 2016	۲	

The **Direct Deposit** tab allows employees to view Direct Deposit account information and offers employees the ability to update how paychecks are deposited into accounts.



Pay Hist	ory Tax Doci	uments Direct	Deposit					
rect Dep	osit							
tep 1: Det de Request a		like to have your paych	eck deposited into one ac	count (Full Net), mult	tiple accounts (	Partial) or Waive	e Direct Deposit to receive a manual payche	ck.
STATUS		ST	ART DATE	END DAT	Έ		DEPOSIT TYPE	
Pendir	10						Partial Deposit	
4   1	▶ ▶ Page size:	5 🔻						1 items in 1 page
			will be deposited in each	account:				
		HEN ENTERING BANK ACC						
								* INDICATES MANDATORY FIELD
Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount		
1	Savings	Savings	00000000	123456	Percent	50.0000%		edit delete
2	Checking	Checking	00000000	123456789	Percent	Remainder		edi
Priority *	Account Type *	Account Name *	Transit/Routing Number	Account Number *	Type *	Amount *		

Via the **Direct Deposit** tab, an employee may:

- Opt to waive Direct Deposit Authorization to receive a manual paycheck.
- Add a Full Net Direct Deposit account.
- Add Partial Direct Deposit accounts.
- Request a change to existing Direct Deposit account information.

#### Adding a Direct Deposit account (full net deposit in 1 account).

The Employee can request a direct deposit request by logging on to the Port. Perform this task below to submit a full net deposit in one account. Perform this task even if you will be adding multiple accounts.

- 1. Login to the Employee Portal.
- 2. Click on the **Payroll** menu item at the right.
- 3. On the **Payroll** screen, click the **Direct Deposit** tab.
- 4. Click on the **Request a Change** button.

Pay History	Tax Documents	Direct Deposit			
Direct Deposit					
Step 1: Determine	if you would like to have	your paycheck deposited into on	e account (Full Net), multiple accounts (Parti	al) or Waive Direct Deposit to receive a manual paycheck.	
STATUS	-	START DATE	END DATE	DEPOSIT TYPE	

5. Enter account information in the **Step 2** section of the screen:

Pay History Tax Documents Direct	Deposit	
Direct Deposit		
Step 1: Determine if you would like to have your paye	heck deposited into one account (Full Net), multiple accounts (Par	tial) or Waive Direct Deposit to receive a manual paycheck.
Waive Direct Deposit Authorization		
🜵 Request a change 😫 Delete		
STATUS STATU DATE	END DATE	DEPOSIT TYPE
	No Data Available	
[◀ ◀ 1 ▶ ▶] Page size: 5 ▼		0 items in 1 pages
Step 2: Please enter your Direct Deposit Account info	mation:	
1.INCLUDE ALL LEADING ZEROS WHEN ENTERING BANK AC	COUNT NUMBERS.	
2.AFTER ADDING A NEW ROW EXISTING PRIORITY ORDER 1	VILL CHANGE.	
		* INDICATES MANDATORY FIELDS.
Priority * Account Type * Account Name *	Transit/Routing Number * Account Number * Type *	Amount *
1 v Checking v	Percent •	100 add
Step 3: Required upload of voided check: Upload Files: Upload file		

- Select the Account Type (Checking, Savings, Issue Paper Check, etc.).
- Enter the **Account Name**.
- Enter the **Transit/Routing Number**.
- Enter the Account Number.
- The **Type** defaults to **Percent** when you add the first direct deposit account.
- The **Amount** defaults to **100%** when you add the first direct deposit account.

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount
1	Checking	Checking	00000000	123456789	Percent	100%

- 6. Click the **Add** button at the right side of the row.
- 7. In the **Required upload of voided check** section, click on the **Upload file** button to upload a voided check. Click the **Submit** button to upload the check.
- 8. Review the Direct Deposit Authorization Statement section.
- 9. If you want your entire paycheck direct deposited into the single account you entered above then click on the **Save** button you are done the status is Pending until approved by your HR Admin, Payroll staff, or the manager (whoever has the authority to approve direct deposits in your company.

### Adding additional direct deposit accounts (partial deposits)

Once you have added the first direct deposit account, you can add additional accounts, and prioritize the order in which you want them to occur.

1. If you want to have your paycheck deposited in additional accounts, click the **Add** button at the right side of the row. The system creates a new blank row at the bottom of the screen to enter information for the new account. The system defaults the **Priority** field to **1** and the **Account Type** field to **Checking** (you can change these).

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount	
1	Checking	Checking	00000000	123456789	Percent	100%	<u>edit</u>
Priority *	Account Type *	Account Name *	Transit/Routing Number	* Account Number *	Type *	Amount *	
1 -	Checking •						add

- Select the Account Type (Checking, Savings, etc.).
- Enter the **Account Name**.
- Enter the **Transit/Routing Number**.
- Enter the Account Number.
- Select the **Type** of deduction from the dropdown (**Percent** or **Dollar**).
- Enter the **Amount** (either the percentage number or the dollar amount). The percent choosed across multiple accounts must total 100%.
- 2. Click the **Add** button.
- 3. Adjust the **Priority** of the accounts, if required. To change the priority of an account, click on the **Edit** button on the row for the account.
- 4. The system moves that account row to the bottom of the screen. Click on the **Priority** dropdown and select a different priority number for this account. You can't change the **Priority** of a **Remainder**; it is always the last priority.
- 5. In the **Required upload of voided check** section, click on the **Upload file** button to upload a voided check. Click the **Submit** button to upload the check.
- 6. Review the Direct Deposit Authorization Statement section.
- 7. Click Save.

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount	
1	Checking	Checking2	00000000	6576	Dollar	\$20	edit delete
2	Savings	Savings	00000000	6500	Percent	50%	edit delete
3	Checking	Checking	00000000	123456789	Percent	Remainder	<u>edit</u>
Priority *	Account Type *	Account Name *	Transit/Routing Number	Account Number *	Type *	Amount *	1
1 🔻	Savings 🔻	Savings	00000000	6500	Percent	50	save cancel

The status is Pending until approved by your HR Admin, Payroll staff, or the manager (whoever has the authority to approve direct deposits in your company).

Once the approver approves the employee's direct deposit request, the **Status** on the direct deposits request screen changes to **Approved**.



Payroll					
Pay History Tax	Documents	Direct Deposit			
)irect Deposit					
🜵 Request a change 🛛 😂 Delet	te				
STATUS		START DATE	END DATE	DEPOSIT TYPE	
Approved		08/10/2016		Partial Deposit	
I Page	e size: 5 🔻				1 items in 1

#### Direct Deposit Notes

- When the user adds a new row into the Direct Deposit screen, by default, the system will set the Priority of the new row to Priority 1. The user can change the Priority.
- The Issue Paper Check Account Type option will always be the second to the last Priority item. The reason for this it the specific way that we submit payrolls in Evolution Classic and create direct deposits and not by an associated E/D for the paper check (the Take Home Pay field value in Evolution Classic).

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Туре	Amount	Issue Paper Check is always 2nd to last priority
1	Savings	Savings	123123123	321321322	Dollar	\$1000	2nd to last priority
2	Checking	Checking2	123123123	321321323	Dollar	\$12	Remainder is always last
3	Issue Paper Check				Dollar	\$150	priority
4	Checking	Checking	123123123	321321321	Percent	Remainder -	

• The Remainder amount is always the Last priority in the direct deposit elections. You can't change the Priority.

**Note**: Account information is only editable in a status of Pending.



### Documents

The documents area allows you to view all company-wide documents added to the system, as well as individual documents assigned to your record. **My Documents** include:

- Items that were entered into the employee folder in HR Administration, or,
- Consent documents created during time of new hire and onboarding.

When **Documents** is selected, you are presented with two tabs: **My Documents** and **Company Documents**. Select either tab to obtain a list of documents available.

My Documents represent attachments specific to the employee.

Documents				
My Documents	Company	Documents		
My Documents				
Active				
Document Name Descr	iption	Category	Date Uploaded	Consent Date
Benefit Summary Benefit	ts	Benefits	05/26/2016	05/26/2016

**Company Documents** are global documents shared to the entire organization. Click on the document name to be directed to the document via hyperlink.

Evolution <sup>®</sup> Advanced HR				
<b>1</b>				
				O Tasks
Documents		_		
My Documents	Company Documents			
Company Documents	Ļ	-		
Active				
Document Name	Description	Category	Date Uploaded	
2016 Holiday Schedule	List of holidays for 2016.	Company	02/05/2016	
Manager Handbook	Policy handbook for managers.	Company	02/05/2016	

### Benefits

Employees can review benefit information using the **Benefits** icon. The Benefits section of the portal contains three (3) sections: **Current**, **Enroll**, and **People**.

The **Current** tab provides information on benefit plans the employee is currently enrolled in. Plans, details, coverage amounts, and costs are displayed on this page. Employees can also obtain a printout of this information by clicking **Print** at the bottom of the screen.

Current	Enroll	People	
Current And Pending	Benefits		Total Per Month: \$30.00
			Cost per paycheck \$6.92
2016 401(k)	details 2016 Dental	details 2016 FSA	details
Capterra	\$0.38	\$0.23 Cigna.	\$0.19
Coverage 6/1/2016 to 5/31/2017 Single \$20.00	EE \$1. EE + 1 \$2. EE + Family \$5.0	0 Single	31/2017

The Enroll tab allows employees to enroll into benefit plans.

Current	Enroll	People
Enroll in Benefits		
Benefit election may only be	accessible for new hires or d	uring an open enrollment period.
New Hire Enrollment	Not Available	
Open Enrollment	Open Enrollment 3/1/2016	to 8/31/2016

The **People** tab allows employees to review dependents and beneficiaries.

Current	Enroll	People		
People				
Name	Relationship	Date of Birth	Dependent	Beneficiary
Marco,Yvette	Other Relative	8/12/1982		



## Training

The training section of the portal, accessible via the **Talent** navigation tile, displays available and completed classes. Employees can enroll in available classes by clicking the **Enroll** button on the class. Employees can also review details of the class (document attachments, web links) by clicking on the hyperlink for the class.

Training				
Training				
Available				
Chase Marris	Enrofment Period	techodule	STATUS	
ests word	12/1/2013 - 12/31/2013	1/3/2014 - 1/3/2014	Closed	
Intro to Sales	12/1/2019 - 12/20/2019	12/22/2013 - 13/22/2013	sunrolled	Oancot
New Employee Orientation	10/10/2013 - 10/31/2013	1/6/2014 - 1/6/2014	Chand	
115 Excel - Beginner	18/1/2010 - 18/01/2010	1/16/2014 - 1716/2014	Enrolled	Gancal
Intro to Jakes	2/1/2014 - 2/28/2014	3/3/2014 - 3/3/2014	Closed	
Effective. Communication	4/4/2014 - 4/30/2014	R/R/2014 . R/R/2014	Cinvert	
Effective Communication	3/1/2014 - 3/30/2014	6/0/2014 - 6/0/2014	Available	Elevent
Completed				
Chave Barrow	Completion Date	Contillication	Cortificato I	Deter
PER Word	1/3/2014			1/3/2013

## Expenses

Allows employees to enter and review expense reports using the Expenses section of the portal. An expense report can contain multiple expense entries. Examples of expense reports could include an itemized list of expenses for a trip, a monthly report of all expenses, or a purchase that needs approval. A list of all active expenses reports, as well as recently approved reports, are displayed. Pending requests can be cancelled by clicking the **Cancel** button beside the report. Expenses can be used at any time after the company has been on boarded into Advanced HR by users with access to the Expenses tab.

Advanced HR has six (6) default Expense types, listed below.

- Gas
- Hotel
- Meals
- Mileage
- Travel
- Vehicle

To add additional Expense types, go to the Expenses tab and click on Add Expense Types.

Add Expense	Types	
Employee Exp		

Once the expense is entered, click **Save** to save that expense entry.

To submit the entire expense report, click the **Submit** button at the top of the expense report screen. The expense report will be submitted to the manager.

То			Add New \$500.00	
То			\$500.00	
Те				
	Amour	nt Status		
/2016 08/01/20:	16 \$500.00	0 Pending	Cancel	Activities

# Chapter 12: Time Management in the Portal

Advanced HR utilizes the company's current Time Off Accrual setup in Evolution to allow employees and managers to see Time Off Balances, Request time off, and Approve time off in the Advanced HR Portal. In the sections below, users will learn key information in the setup of Time Off Management for Advanced HR.

# Using Time Off in the Portal

Employees and Managers can access Time off Requests in the Portal by clicking on the **Time** tile. Depending on their role, they will have up to four (4) tabs from which to work:

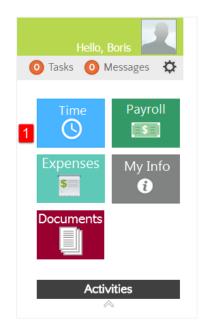


- **Employee Requests** For manager/time off approver use. This tab displays pending employee requests to be reviewed.
- **My Requests** Displays the employee's current time off requests and balance information.
- My History Displays the employee's Time Off history including past approved and denied requests.
- **Time Off Analysis** For manager/time off approver use. This tab displays pending and approved time off requests for employees in the Time Off approver's team. This tab allows the time off approver to analyze the requests and see any potential conflicts.

### Checking your current Time Off balance

To check your current Time Off balance:

1. On the Portal, click on the **Time** tile.



2. On the **My Requests** tab, click on the type of Time Off for which to check the balance.



My Request	s My	History				
+Add Request						
All	Va	acation 2	Sick			
Гуре	Balance	Pendi	ng Approval	A	vailable Baland	се
Vacation	13.00	16.0	0		13.00	
Request Date	Status	Туре	Start Date	End Date	Time	Employee Note
05/05/2016	Pending	Vacation	05/05/2016	05/06/2016	16.00	Vacation Days

3. The balance of that Time Off plan will be displayed beneath the buttons.

Note: If only one type of PTO is available, the Balance will be displayed automatically.

### **Requesting time off**

To request time off:

1. From the My Requests tab, click on Add Request.

My Reques	ts My	/ History				
+Add Request	1					
All		Vacation	Sick			
Request Date	Status	Туре	Start Date	End Date	Time	Employee Note
05/05/2016	Pending	Vacation	05/05/2016	05/06/2016	16.00	Vacation Days

- 2. Select the Plan Type by clicking one of the buttons on the left side of the screen (Vacation, Sick, etc.).
  - If selected on a particular Time Off plan when clicking on Add Request, the request will default to that plan type.
  - Enter in the **Start** and **End** date for which this Time Off is being requested for.

Time Off Request - Boris Dyer - Pending Note: When entering the start and end dates, Available Balance 13.00 Type Vacation Accrued 15.00 Balance 13.00 Pending Approval 16.00 additional days will appear in the request grid, one for each workday within the request dates. 5/10/2016 3 5/10/2016 08 00 Sick Гуре 3. Enter the number of hours per day that you are requesting. Note: Entering the number of hours here will default the number of hours per day. 🗆 Include Weekends 🧕 6 Total Time:8.00 Employee Response 7 Manager Resp 4. If one or more days should have a 8 Save Cancel different number of hours requested, use the drop-down list on that particular day

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to change the number of hours.

- 5. If weekends should be included as part of the request, select the **Include Weekends** option.
- 6. Enter a note in the **Employee Response** as needed.
- 7. Click on **Save** when complete.

This time off request will now be displayed as **Pending** on the **My Requests** tab. While this request is in Pending status, it can be edited by the employee.

#### To edit a Pending time off request:

1. From the **My Requests** tab, click on the date of the pending request.

My Request	s My	History				
+Add Request						
All		/acation	Sick			
Request Date	Status	Туре	Start Date	End Date	Time	Employee Note
	Pending	Vacation	05/05/2016	05/06/2016	16.00	Vacation Days

- 2. Update the necessary information.
- 3. Click **Save** when complete.

Additional Time Off requests can also be entered. If an employee has a Time Off request that is currently in **Pending** status, and they enter another Time off Request for the same Time Off type on adjoining days, Advanced HR will combine those requests into a single request.

Example: Boris Dyer has entered a Time Off request for Vacation time on 5/5/2016. This request is currently in Pending status. He has also decided that he would like to take off the next day, 5/6/2016. Boris can click on Add Request, and enter in a request for 5/6/2016. When he saves it, since his original request is still pending, Advanced HR will combine these requests.

### Time Off approval

When an employee submits or updates a Time Off request, the manager(s) receives an email with the information. The email is sent to the manager's Work Email address from Advanced HR.

	Time Off Type:	Vacation
Date	Hours	Minutes
/5/2016	8.00	0.00
Regards.		
Regards, Boris Dyer,		

The email contains the Dates and Hours of the employee's Time Off request as well as a link to log into the portal.



#### To Approve/Deny time off:

- 1. Log into the portal and click on the **Time** tile.
- 2. On the **Employee Requests** tab, select the **Time Off Request** and click on the **Approval** button.

Employee	e Requests	My Requests My History		Time Off Analysis		
Employee Boris Dyer	Start Date 05/05/2016	End Date 05/06/2016	Time 16.00	Boris Dyer	Vacation 16 hours 05/05/2016 - 05/06/2016 Vacation Days	
		2 Appr	oval			

3. Review the Time Off request information.

Managers may update the dates or the number of hours on any of the time off dates.

Time Off App	roval - Boris Dyer	- Pending	1		
Type Vacation	Accrued 15.00	Balance 13.00	Pending Approva 16.00	al Available Balance 13.00	
5/5/2016	3 5/6/2016		08	<b>3</b> 00 <b>•</b>	
Туре	Date		Hours	Minutes	
Vacation	5/5/2016		08 7 2	00 -	
Vacation	5/6/2016		08 7 3	00 -	
			Total Time:16.00		
Vacation Days				Manager Response 4	
				5 Approve Deny Delete Cance	

- 4. Enter in the **Manager Response** as needed.
- 5. Click on Approve, Deny, or Delete to take action on this Time Off request.
- 6. An email is sent to the employee with the response regarding this Time Off request.

	oo maa i nare approrea me rene	wing Time Off Request:
	Time Off Type:	Vacation
Date	Hours	Minutes
5/2/2016	1.00	0.00
5/3/2016	1.00	0.00
5/4/2016	1.00	0.00
Note: Manager Note: Regards, <b>Megan Forsyth</b>		
negan rorsyn		
UAT Testing Company		

#### Time Off Analysis

The **Time Off Analysis** tab can be used to review multiple employees' time off requests and give managers easier access to see if there are any conflicts. This tab will display both Pending and Approved Time Off requests. Pending Time off can also be approved and Approved Time off may be edited by the manager from this tab.

To approve pending or edit approved time off:

- 1. Click on the **Request Date**.
- 2. Update the information as needed.
- 3. Click on Approve, Deny, or Delete
- 4. Enter in the **Manager** Response.
- 5. An automated email will be sent to the employee.

**Note:** Time off analysis can be exported to Excel by clicking on the Export to Excel button.

Employee	Requests	My Re	equests	My His	tory	Tim	e Off Analysis	
ime Off Analy	me Off Analysis							
Export to Ex	cel							
Request Date	Status	Employee	Start Date	End Date	Time	Туре	Employee Note	Manager Note
05/05/2016	Pending	Boris Dyer	05/05/2016	05/06/2016	16.00	Vacation	Vacation Days	
05/02/2016	Approved	Janice White	05/02/2016	05/04/2016	3.00	Vacation		

# SwipeClock Portal view

Once completed, employees will be able to access their SwipeClock information by clicking on the **Time** tile in the Portal. There are two tabs that will be available depending on the employee's role in the time keeping system.

All employees will see a **Time Management** tab where they will have whichever options are available to them in the time keeping system. This can include the dashboard, web clock, time sheet, Time Off requests, and Personal information.

Time Managemer	nt	Time	Payroll
Time Management	Hello Anna James   Log Out	Benefits	My Info
Dashboard	Employee Self Service Portal - JS Shelburne Inn & Shoppes Welcome Dashboard	InfoBlock	Documents
Web Clock	Anna James, welcome to your employee portal. Announcements:	Talent	
Time Off Requests Personal Information	Statistics: • Total hours worked this pay period: 4.00 • Total missing punches: 0 • Edits made to your time card this period: 0 • Pending Time Off Requests: 0 • Total time card notes for this period: 0		ivities ⊗
evoPro Solutions			

Supervisors/Managers will also have an **Approvals** tab for approving Time Off, Time Cards and completing their time keeping duties.

Time Management	Approvals	
Approvals	[Find] JS Shelburne Inn & Shoppes	
Find employees Online Timekeeping	Dashboard	Hello Anna James   Home   Help   Log Out
MAIN MENU JS Shelburne Inn & Shoppes Dashboard (Try Dashboard Bota) Time Off Requests (1) Employee Setup	Introducing ou? new Dashboard beta!         TRY DASHBOARD BETA           Quick Stats - JS Shelburne Inn & Shoppes         Total Employees Cicked in 0           • Total Employees Cicked in 0         0	
Add New Employee Time Cards Multi-Time Card Editor	Time Of Requests: 0     Trad Mission Funches: 0     Total Unmatched Punches: 0     Total Employees with Web Clock Enabled: 60     Last Finalized Pay Pendol 3292/016     New Release. Release N cloces     New Release. Release N cloces	
<ul> <li>Yesterday's Entries</li> <li>Today's Entries</li> </ul>	Quick Links	
Current Period - Start: 5/10  Previous Period - End: 5/9	Getting Started • Add a new employee Employee Setup • Update Personal Information	
<ul> <li>Select Other Periods</li> <li>Multi Time Card Approval</li> </ul>	Daily • Correct Missing Punches • Assign Unmatched Punches • Review Yesterday's Punches	
& Maintenance Menu	Fach Day Davied	

# Appendix 1: To create a user in Evolution Classic

To create a user in Evolution Classic, follow the steps below:

- 1. Log into Evolution Classic.
- 2. Go to Admin Security Users Details tab.
- 3. Click the **Plus** sign in the toolbar to create a new record.
- 4. Enter a User ID.
- 5. Enter the User's First and Last Name.
- 6. Click **Yes** in the **Active User** box.
- 7. Create/confirm a password (This password can be changed at a later time.).
- 8. Select the Security Level.
  - Administrator: can change security settings for all users
  - Manager: can change security settings for managers, supervisors and users
  - Supervisor: can change security settings for supervisors and users
  - User: can change their own security settings, but cannot view or change settings for which they don't
- 9. Select a **Department** currently have access.
- 10. Select the appropriate Analytics Personnel.
- 11. Select the User's Stereotype:
  - **S/B Internal**: Employee of the service bureau
  - Remote: Client who accesses Evolution Classic. Select the client name in the field to the right.
  - Web: Client who access Evolution Classic through the Internet and uses an ancillary iSystems product to create payrolls
- 12. Go to the Groups tab.
- 13. Select and add the User's Security Group.
- 14. Click the **Checkmark** sign in the toolbar to save the record.

# Appendix 2: Employee Payroll fields

The following tables are a list of the field descriptions for the Evolution Payroll Employee screens running within Advanced HR.

## **Employees - Labor Defaults screen**

Field / Button	Description
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim.
Job	Job set up by the company.
Pay Group	Select the pay group.
General Ledger Tag	Enter if the company is using General Ledger.

## Employees - ACA Screen

Field / Button	Description
ACA section	
ACA Status	Previously located on the Employee – Personal screen this field has been moved to the new ACA screen. May be automatically filled for new employees with the default ACA Status set up on the Company - General - Company Info - ACA tab, used to determine whether the employees are to be considered new employees or continuing employees, full-time eligibility, etc.
ACA Coverage	Select the applicable option for this employee from the 1095-C Instructions – Line 14.
ACA Benefit	Select the name of the benefit that will be used to determine the Lowest Cost Benefit for this employee.
ACA Policy Origin	Select the appropriate option for this employee for use on the 1095-B – Line 8.
Benefits Eligible	This field defaults to whatever was set as the default on the Company - General - Company Info – WComp & Benefits tab.
Reporting section	
Form on File	Is there a consent form on file for the employee to allow electronic publishing of the 1095 form(s)?
ACA Format	Select the form format that will be created for the employee. None, Both, or Paper.
Form Type	<ul> <li>New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field.</li> <li>Right-click and select Copy to to copy to other employees.</li> </ul>



Field / Button	Description
ACA section	
ACA Standard Hours	Enter the standard number of hours for salaried employees, which will be used when calculating ACA hours.
Applicable Section 4980H	Select the appropriate option for this employee from the 1095-C Instructions – Line 16.
Lowest Cost Benefit	Select the Lowest Cost Benefit to be used on the 1095-C.

## Employees - Pay Screen

Field / Button	Description
Salary Information section	
Pay Frequency	How often the employee's paycheck is processed.
Salary Amount	Salary earned per pay period (salaried employees only).
Standard Hours	Number of hours the employee is expected to work (this may be left blank for salaried employees working a 40-hour week.)

Average HoursAverage hours the employee works - this field is system-calculated and is not editable.Rate NumberThe rate number if not the primary rate - this is read only.Rate AmountThe rate for the rate number above.Wage LimitWage limit used for Workers' Comp billing and impounds.Limit FrequencyIf there is a wage limit, to what period is the limit applied?AnnualizedIf there is a wage limit for a period other than annual, what is the annualized total amount of the limit?Calc AnnualThe system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.Planned Updates sectionThe following fields are informational only, and do not affect pay amounts now or in the future raise.Raise DateThe potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.Raise %The potential percentage of the future raise. Use this for salaried or hourly employees.Raise RateThe hourly rate of the potential raise.Pay FrequencyThe frequency the employee will be paid after the future raise. Position sectionPosition sectionThe fields in this section used to be on the Positions screen.		
Rate AmountThe rate for the rate number above.Wage LimitWage limit used for Workers' Comp billing and impounds.Limit FrequencyIf there is a wage limit, to what period is the limit applied?AnnualizedIf there is a wage limit for a period other than annual, what is the annualized total amount of the limit?Calc AnnualThe system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.Planned Updates sectionThe following fields are informational only, and do not affect pay amounts now or in the future.Raise DateThe potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.Raise &The potential percentage of the future raise. Use this for salaried or hourly employees. If there is a value in this field, neave the Raise Rate field empty.Raise RateThe hourly rate of the potential raise.Pay FrequencyThe frequency the employee will be paid after the future raise. Use this for salaried or hourly employees.Raise RateThe hourly rate of the potential raise.Pay FrequencyThe frequency the employee will be paid after the future raise.Pay FrequencyThe field in this neation model to hourly employees.	Average Hours	• • • •
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Image: Calc Annualannualized total amount of the limit?Calc AnnualThe system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.Planned Updates sectionThe following fields are informational only, and do not affect pay amounts now or in the future.Raise DateThe date a future raise takes effect.Raise AmountThe potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.Raise %The potential percentage of the future raise. Use this for salaried or hourly employees.Raise RateThe hourly rate of the potential raise.Pay FrequencyThe frequency the employee will be paid after the future raise.	Limit Frequency	If there is a wage limit, to what period is the limit applied?
IntervalueIn Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.Planned Updates sectionThe following fields are informational only, and do not affect pay amounts now or in the future.Raise DateThe date a future raise takes effect.Raise AmountThe potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.Raise %The potential percentage of the future raise. Use this for salaried or hourly employees.Raise RateThe hourly rate of the potential raise.Pay FrequencyThe frequency the employee will be paid after the future raise.	Annualized	
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Pay Frequency The frequency the employee will be paid after the future raise.	Raise %	
These fields in this section used to be an the Desitions server	Raise Rate	The hourly rate of the potential raise.
Position section These fields in this section used to be on the Positions screen.	Pay Frequency	The frequency the employee will be paid after the future raise.
	Position section	These fields in this section used to be on the Positions screen.



Field / Button	Description
New Hire Report	<ul> <li>Required field.</li> <li>Pending - select this option any time prior to the employee's first payroll, after which time it is automatically updated to Complete.</li> <li>Completed - if the service bureau is using new hire reporting services, the employee has been reported as a new hire</li> <li>Completed by Predecessor - the employee was reported as a new hire by another service bureau</li> <li>If an employee's status has changed from another code back to active, when the changes are saved, a message asks if this is a rehire.</li> <li>No - system saves the employee record and doesn't ask any more questions</li> <li>Yes - system changes the New Hire flag to Pending and opens the Rehire Wizard. The Wizard includes a series of employee screens for the user to verify the employee's set-up for pay rate, states, locals, TOA, Scheduled E/D's, and direct deposits. The Wizard only displays screens applicable to the employee.</li> </ul>
FLSA Exempt	Is the employee exempt from minimum wage and overtime pay under the Fair Labor Standards Act?
Position	Employee's work position at the company, set up on the Company – Benefits – HR Positions screen.
Effective Date	Date the employee's position became effective.
High Comp	Is the employee highly compensated?
I-9 on File	The employee's form I-9 is on file.
Corporate Officer	Is the employee a corporate officer?
Overrides section	
Add / Delete buttons	Click to add a pay rate or delete a pay rate that is no longer applicable.
Primary column heading	Select <b>NO</b> , if this is not the employee's primary wage at the company.
Rate Number column heading	If a standard wage, the new line should have a Rate Number of 2 or more.
Rate Amount column heading	Enter the amount of the new rate.
Overrides – Job section	
Jobs Number	Number identifying the job that the employee has at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade Position	Position the employee holds in the pay grade at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade	Pay Grade in which the employee's position falls. Overrides what was set up on the Employee – Pay Rates screen.

## Piecework Sub-menu

Field / Button	Description
Add	Click to add a new item to the piecework.
Delete	Click to delete a piecework item.
Piece column heading	Click in the blank line created by clicking the <b>Add</b> button. The piece is listed in the dropdown list.
Rate Amt	Rate for the piece. The rate is listed in the dropdown list
Rate Qty	The rate quantity is pulled from Evolution, where it was originally set up at the Client level.

## Auto Labor Distribution Sub-menu

Field / Button	Description
Labor Distribution Options	Defaults to <b>Distribute Both</b> - method used to distribute employee's labor for unions. They may be distributed for earnings, taxes, deductions, all, or none, and must be used in conjunction with the <b>Auto Labor</b> <b>Distribution E/D Group</b> field.
Auto Labor Distribution E/D Group	E/D Group used to distribute the employees' labor.
Allocation section	
Add	Click to create a new record.
Delete	Click to delete an entry.
Percentage	Percentage of the employee's pay attributed to that organizational level.
Organizational Level	Name of the organizational level for which the employee works
Job	Title of the job worked in the level.
WC Code	Workers' Comp code associated with that job.



## Employees - Federal screen

Field / Button	Description
Marital Status	Marital status for federal tax purposes.
Exemptions	Number of exemptions for the employee.
Тах Туре	Additional or override tax amount.
Value	Based on the tax type, the corresponding value.
FUI Rate Credit	The amount by which to override a FUI Rate Credit, if applicable.
Override Fed Minimum Wage	Value used to override the Federal Minimum Wage rate used in payroll for minimum wage makeup calculations.
	<ul> <li>If a value is entered, the amount is used as the rate for minimum wage makeup calculations.</li> </ul>
	• The value may be overridden if a State Minimum Wage override is entered on the Employee - States - Overrides tab. In that case, Evolution uses that rate in the calculation.
	• If both fields are populated, the Federal Override is used in the calculations for all states attached to the employee that do not have overrides set up. Otherwise, the state override rate is used.
	<ul> <li>If no overrides are entered, standard system logic is applied in the calculation (taking the higher of the Federal or State Minimum Wage rate at the system level). Right-click on the field and select 'Copy To' to copy the information.</li> </ul>
EE Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
Federal Tax Status	This is the employees' tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
OASDI Exempt	Whether or not the employee is exempt from paying OASDI.
Medicare Exempt	Whether or not the employee is exempt from paying Medicare.
ER Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
FUI Exempt	Whether or not the employer is exempt from paying FUI for this employee.
OASDI Exempt	Whether or not the employer is exempt from paying OASDI for this employee.
Medicare Exempt	Whether or not the employer is exempt from paying Medicare for this employee.

Field / Button	Description
W-2 Form section	
Туре	Type of tax form being filed if not W-2; select from the dropdown list.
Residential State	State for which tax forms are being filed as the employees' residence.
First Name	Legal name for whom all tax forms will be prepared – complete only if different from the information on the Basics tab.
Middle Name	
Last Name	
Name Suffix	
W-2 Settings section	
Deceased	Status is designated on the Form W-2 as deceased.
Statutory Employee	Status is designated on the Form W-2 as statutory.
Legal Rep	Is there a Legal Rep designated on the Form W-2?
Deferred Comp	Are these earnings designated as deferred compensation on the Form W-2?
Pension	Are these earnings from a Pension plan?
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R.



# Employees - State screen

Field / Button	Description
County	County within the state selected.
Salary Type	Select the salary type for the employee, if applicable.
Calc SUI Taxable 1099 Wages checkbox	If selected, the SUI taxable wages for this employee are calculated for the state.
Work at Home	For PA only.
Tax Code	This is a generic code and can be used to add details needed for returns.
Reciprocation section	
Method	Reciprocal method – select from the dropdown list.
State	Select the state with whom the residential state has the reciprocal agreement – the states listed are those the company sets up to do business with.
Amount / Percentage	Amount required to reciprocate; used based on Reciprocation Method.
EE Tax Status section	
Employees – State screen	Employees – State screen
State Tax	Employees' state tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
SDI Exempt	Whether or not the employee is exempt from SDI.
SUI Exempt	Whether or not the employee is exempt from SUI.
ER Tax Status section	
SDI Exempt	Whether or not the employer is exempt from paying SDI for this employee.
SUI Exempt	Whether or not the employer is exempt from paying SUI for this employee.
Overrides section	
Тах Туре	Tax type to be overridden.
Amount / Percentage	Amount of the override.
Minimum Wage	Does the override revert to minimum wage?

# Employees - Local screen

Field / Button	Description
Column Headings	
Local	Local tax added at the Company level.
State	State in which the local agency resides.
County	County in which the local agency resides.
Local Type	Employee or employer tax.
Tax Rate	Tax rate entered at the system level for the local tax.
Misc Amount	The amount used to adjust the percentage of state taxes when that calculation method is used.
Tax Code	Used only if an additional tax code is necessary.
Active	Whether or not the local tax is currently active.
Tax Status	Should the local be included, blocked, or is it exempt?
Deduct Behavior	Should the tax be always deducted, never deducted, or are there no overrides?
Work Address Location	PA only.
Overrides section	
Pre-tax Deductions	Does the taxable wage base used to calculate local taxes include pre-tax deductions?
Тах Туре	Tax type of the overridden tax, if any.
% of Taxable Wages	The percentage of taxable wages used to calculate local taxes.
Tax Value	If an Override Tax Type is entered, this field is required.

# Employees - Child Support screen

Field / Button	Description
Priority	Priority in order of all Scheduled E/Ds – Child Support usually has number 1 priority over all other E/Ds.
Case #	Case number assigned by the Child Support agency.
State Origin	The state in which the Child Support Order originated.
Medical Eligible	This field is pre-filled from the <b>Healthcare Coverage</b> field value on the Employees – Basics screen.

Field / Button	Description
Agency	Child Support Agency responsible for collecting the money for payment.
Arrears	Change to <b>Yes</b> if Child Support payments are in arrears on this case.
FIPS	Five-digit Federal Information Processing Standard (FIPS) code (FIPS 6-4) that identifies counties and county equivalents in the United States.
Custom Field	If the company has established a custom field to help with tracking.

# **Employees - Direct Deposit screen**

Field / Button	Description
ABA#	Routing number identifying the financial institution.
Bank Account#	Number of the account to which deposits are made.
Account Type	Type of account to which deposits are made.
Branch Identifier	Bank Identifier used when transferring money and wiring money.
Addenda	Additional information (if any) to be added to the direct deposit instructions.
In Pre-Note	Is the direct deposit within the period of validating the account credentials?
Form on File	Tracks whether or not there is a Direct Deposit Authorization form on file.
Allow Hyphens	Yes means hyphens are allowable characters in the bank account number.

# **Employees - Scheduled E/Ds screen**

Field / Button	Description
Basic tab	
Code	E/D Codes assigned at the system level – select from the dropdown list.
Description	Entered automatically when the E/D Code is selected.
Priority	Priority to process the Scheduled E/D (Child Support E/Ds are always Priority 1).
Calculation Link	Select an E/D Group that the Scheduled E/D belongs to (if applicable).
Calculate Using	Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options: 1. Use the calculation method that has been defined for the E/D
	<ol> <li>Use the calculation method defined at the Company Benefit level.</li> <li>Use the calculation method defined at the Employee Benefit level.</li> </ol>
Calculation Method	Method used to calculate deductions from payrolls. Select the method from the dropdown list. Amount \$ - If the Calculation Method selected is a fixed dollar
	amount enter that amount. <b>Amount %</b> - If the Calculation Method selected is based on a percentage enter the percentage amount.
E/D Group	Select an E/D Group if the Scheduled E/D is included in an E/D Group.
Note: Earnings must be set up as a n as 401(k)s.	nember of an E/D Group, which simplifies the calculation of earnings such
Always Pay / Deduct	<ul> <li>Offers flexibility to override E/D, similar to Blocking Week 1 - 5</li> <li>All payrolls - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll.</li> <li>Current Payrolls - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later.</li> <li>If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the Deductions to Zero field.</li> <li>No - if the employee has no wages in a payroll cycle, the system does not pay/deduct the E/D, nor is it tracked it to be made up later</li> </ul>

Field / Button	Description
Deductions to Zero	Defaults to the Deductions to Zero Default field on the Client - E/Ds - Scheduled Defaults tab. It can be overridden here by E/D, by employee, and instructs how much of a deduction should be taken if there is not enough to take the entire amount. This does not turn Shortfall / Deduction not Taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions.
	<ul> <li>Yes - the entire amount is deducted, until the check is zero. If there is shortfall it may be either a portion of or the total amount of the Scheduled E/D.</li> <li>No - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount. When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall, but not all of the deduction, Evolution takes the shortfall, but not the deduction.</li> </ul>
Deduct Whole Check	<ul> <li>Value selected defaults based on the setting applied on the Client - E/Ds</li> <li>Scheduled Defaults tab</li> <li>Yes - deducts the net check (use for direct deposits).</li> <li>No - deducts a portion of the check.</li> </ul>
Send To*	Select Agency or Client, Company, or Direct Deposit.
Reference to Display on Check	If being sent to Agency or Client/Company on behalf of the employee
Schedule tab	All payment schedule-related information is on this screen.
Starting	Starting date for the scheduled deduction.
Ending	Ending date for the scheduled deduction.
Affects section	
Payrolls affected	Identify which payrolls are affected by the deduction.
Frequency	How often the deduction of the Scheduled E/D occurs.
Blocks section	
Block Based On	If there are blocks on any of the payroll weeks identify whether it is custom defined or being blocked to keep the deduction at four weeks per month.
Weeks Blocked	Identify which, if any, week(s) is blocked from having the deduction taken

Field / Button	Description
Limits tab	
E/D Group	E/D Group to which the minimum Scheduled E/D belongs (same as <b>Minimum E/D Group</b> field on the Employee – Scheduled E/Ds – Advanced tab).
Pay Period %	Minimum percentage (if the deduction is quoted as a percentage) to be taken per pay period.
Pay Period \$	Minimum dollar amount (if the deduction is quoted as an amount) to be taken per pay period.
EE Annual \$	Maximum dollar amount the employee is allowed to contribute per year.
Client Annual \$	Maximum dollar amount the client can contribute per year for the employee
Maximum Averages section	
Amount E/D Group	This information is used for special Union dues calculations.
Hours E/D Group	
Hourly Rate	
Thresholds tab	
Action	These fields refer to the goal amounts at which deductions stop – the
Remaining	same information entered on the Employee – Scheduled E/Ds Advanced tab in Evolution.
Balance Taken	
Amount \$	
Thresholds section	
E/D Group	

# Appendix 3: Templates and Alerts

## Create a Template for use in an Alert

Follow these steps to create a template for use in an Alert in Advanced HR.

Step	Description
1.	From the Advanced HR Home page, click the Communications menu item, navigate to <b>Communication</b> – <b>Templates</b> .
2.	Click Add.
3.	Enter "Happy Birthday!" as the <b>Template Name</b> .
4.	Select "Letter Template" as the <b>Category</b> .
5.	Chose "Personal Info" as <b>Select Form</b> .
6.	Under <b>Fields in Form</b> , check the following [First Name]
7.	In the Message, enter the following text around your form field: Dear [First Name], Wishing you a very Happy Birthday! We all hope that you enjoy your day. Stop by Bob's office to pick up your bag of money. Sincerely, Human Resources and the whole team
8.	Click <b>Save</b> .

## Create a "New Hire!" alert

Create a New Hire Alert in Advanced HR to be sent to IT, Finance, and managers in the company to ensure that the new hire has all of their equipment, workstation, and training times setup for their hire date.

Step	Description
1.	Navigate to Communication – Alerts.
2.	Click Add.
3.	Select Event Based Alert as the Alert Type.
4.	Add "New Hire" as the <b>Title</b> .
5.	If a New Hire Letter template exists, select this in the <b>Template</b> drop-down menu.
6.	Leave Field Change Alert blank.
7.	Leave Status Change Alert blank.
8.	Select New Hire Alert.
9.	This Alert Applies to: Select the positions this alert will apply to only in a Position Enabled Company.
10.	Send To : Select Select Individuals.
11.	Select By Criteria to Begin Sending Alerts.
12.	Select Email as the Send This Alert To: from the drop-down menu.
13.	Click Save.

## Create an Email/Letter template

Follow these steps to create an email/letter template in Advanced HR.

Step	Description
1.	From the Advanced HR Home page, click the Communications menu item, navigate to <b>Communication</b> – <b>Templates</b> .
2.	Click Add.
3.	Enter "Driver's License Information Update Request" as the Template Name.
4.	Select "Letter Template" as the <b>Category</b> .
5.	Chose "Personal Info" as <b>Select Form</b> .
6.	Under <b>Fields in Form</b> , check the following: [First Name] [Driver's License State] [Driver's License Number] [Driver's License Expiration]
7.	In the Message, enter the following text around your form fields: Dear [First Name], We have the following driver's license on record for you: [Driver's License State] [Driver's License Number] [Driver's License Expiration] Please take the time to make sure this information is accurate. If it is not, please update your license data that we have on record by March 31st, 2016. Thanks! Human Resources
8.	Click Save.

# Your new template will be available as a **Template Name** in **Communication – Alerts** and **Select Template** in **Communication – Messages**.

Additional settings specify whether individual users have full access, read-only access, or no access.

- 1. Go to the Admin Security Users (or Groups) screen, and select the user.
- 2. Click the **Details** tab **User Rights** button.
  - Modify settings by right-clicking the green plus sign / red minus sign, and selecting Enabled or Disabled.
  - Click the small **plus signs** (far left) to open a menu 'tree'. Everything can be selected individually to give or remove permissions to users.
- 3. Click the black plus sign next to Employee to open related topics.
- 4. Right-click the item to be changed from standard group rights.



# Appendix 4: Advanced HR standard reports

The following is a list of the Advanced HR standard reports.

- Approved Expenses Report
- Current Benefit Elections
- EEO Non-Fileable Info
- EEO Utilization Analysis Report
- EEO1 Report
- Emergency Contacts
- Employee Directory
- Employee OE Health Benefit Cost
- Employee Roster
- Employees Assets
- Employees Class Code Eligibility
- Employees Demographics
- Employees Hired/Term
- Employees OE Census
- Employees Roles
- Employees Years of Service
- Future Benefit Elections
- Open Enrollment Employee Election
- OSHA300 Report
- VETS-100 Report
- Withholding

# Appendix 5: Using the Mass Change utility

You can use the Mass Change Utility to make changes in bulk to multiple employees individually one at a time or to an employee group all at once.

## Using Mass Change - by employee

Follow these steps to use the Mass Change utility by employee method. For example, to update the Home and Work email address for selected employees individually.

Step	Description
1.	From the Advanced HR Home page, click the <b>Utilities</b> menu item.
	Employees Payroll Communications Expenses Administration Reporting Utilities Setup
2.	On the Utilities menu, click the Mass Change menu item.
	Select Employees       Select Fields       Update Values       Review & Submit       Summary & Next Steps         Select the Employees       Select the employees that will be impact by the update.         Available Employee       Select CE Employees         Adian Mees31       Select CE Employees         Adian Mexsy22       Andrew Allen64         Andrew Allen64       Select GE Update Value         Angels Landoury91       Select Select Value         Angels Landoury93       Select Value         Angels Landoury91       Select Value         Angels Landoury93       Select Value         Annes Amers27       Select Value         Annes Ames27       Select Value         Anthony Leary99       Select Value         Landours Comments       Select Value
3.	Select the employees to be updated. Select each employee on the left side of the screen and click the right arrow button to move them to the right side.

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# Step Description TIP: You can quickly select & move all the employees on the left side of the screen to the the right side of the screen by clicking the double left arrow button . 4. Click the Save and Continue button. Result: The system displays the Select the Fields screen. 5. Select the field(s) to be updated for the selected employees and click the right arrow to move the field(s) to the right side of the screen. For example – Home & Work Email. Select the Fields Select the Fields

Available Fields		Selected Fields	
Compensation Date of Birth First Name Hire Date Home Phone Last Name Middle Name SSN Street Street1 Street2 Work Phone Zip Code	****	Home Email Work Email	
Update Option			
By Employee Update the Selected fields for e	each selected employe		

6. In the **Update Option** section at the bottom, select **By Employee** and then click the **Save & Continue** button.

Select Empl	oyees Selec	t Fields	Update Values	Review & Submi	t Sumi	mary & Next	t Steps
ndividual Upda	ite						
or each employe	e, enter the update a						
				Update Action	Work Email Value		Date
. Anne Blake	Replace with		7/5/2016	Replace with 🔻		7/5/2016	
Abigail Brown	Replace with 💌		7/5/2016	Replace with 🔻		7/5/2016	
. Anna James	Replace with 💌		7/5/2016	Replace with 💌		7/5/2016	
Austin Smith	Replace with		7/5/2016	Replace with		7/5/2016	

7. You can now update the field values (Home Email & Work Email address for example) for each employee individually. Below is a close up view of the Home Email update field section of the screen:

Employee	Update Action	Home Email Value	Effective	Date
1. Anne Blake	Replace with 🔻		7/5/2016	
2. Abigail Brown	Replace with 💌		7/5/2016	
3. Anna James	Replace with 🔻		7/5/2016	
4. Austin Smith	Replace with 🔻		7/5/2016	

8. Click the **Save & Continue** button.

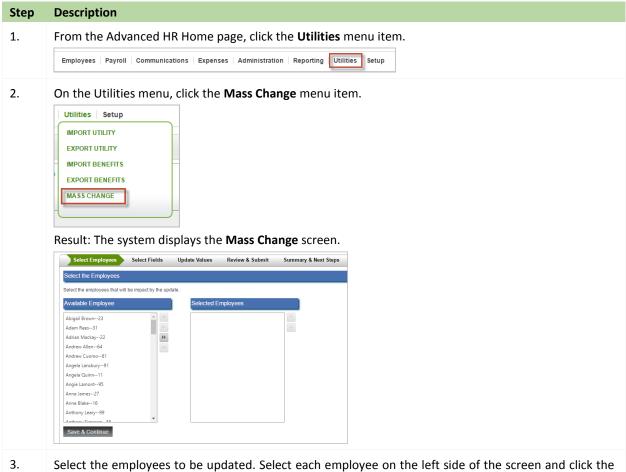


Step	Description
9.	You can then Review the information one last time before you <b>Submit</b> the changes.

## Using Mass Change - by group

The Mass Change utility By Group method allows the user to select whichever employees they choose and update a field or fields for all of the employees at one time. For example, let's assume that multiple employees were originally entered with a city name of Shelburne but they were actually located in Bennington. You could use the Group method to select the employees and enter the value for the correct city, updating all of those employees at one time.

Follow these steps to use the Mass Change utility by group:



right arrow button to move them to the right side.

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#### Step Description

elect the employees that will be	impact by the updat	θ.	
Vailable Employee		Selected Employees	
Adam Rees31	^ <b>P</b>	Abigail Brown23	
Adrian Mackay22	-	Anna James27	
Andrew Allen64	•••	Anne Blake16	
Andrew Cuomo61	44	Austin Smith33	
Angela Lansbury91	_		
Angela Quinn11	_	<b></b>	
Angie Lamont95			
Anthony Leary99			
Anthony Simpson55			
Audrey Rampling56			
Betsy Hostess100			

**TIP:** You can quickly select & move all the employees on the left side of the screen to the the right side of the screen by clicking the double left arrow button.

4. Click the **Save and Continue** button.

Result: The system displays the Select the Fields screen.

5. Select the field(s) to be updated for the selected employees and click the right arrow to move the field(s) to the right side of the screen. For example – Home & Work Email.

Available Fields		Selected Fields	
Compensation Date of Birth First Name Hire Date Home Phone Last Name Middle Name SSN SSN Street1 Street2	• • •	Home Email Work Email	
Work Phone			
Zip Code	-		
Jpdate Option By Employee Update the Selected fields for eac	h selected employ	98.	

6. In the **Update Option** section at the bottom, select **By Group** and then click the **Save & Continue** button.

Result: The system displays the **Update Values** screen.

Group Update For all employees sele			and the state			(
	cted ,enter the upd	ate action, the and the	effective date.			
Fields Selected.	Home Email Value	Effective Date	Update Action	Work Email Value	Effective Date	
Replace with ·		7/5/2016	Replace with		7/5/2016	
<ul> <li>Blake Anne</li> <li>Brown Abigail</li> <li>Lamont Angle</li> </ul>						
					Save & Continue	

#### Step Description

7. In the Value field, enter the updated value and then select which employees to update with this value by clicking the check box next to each employee name, or click the Employees Selected option to select all the employees.

Select Employees	Select Fields	Update Values	Review & Submit	Summary & Next Steps
roup Update				
all employees selected ,enter	er the update actio	n, the and the effective da	ate.	
elds Selected.		City		
		Value	-	Effective Date
Replace with 💌		Benningtor		7/5/2016
Employees Selected		Ļ		
Quinn Angela				
<ul> <li>Blake Anne</li> <li>Brown Abigail</li> </ul>				
<ul> <li>Brown Abigali</li> <li>James Anna</li> </ul>				
				Save & Continue

In our example, we entered the City value (Bennington) that we want to update the group of employees with all at once.

8. Click the **Save & Continue** button.

	Select Employees		Update Values	Review & Submit	Summary & Next Step
Revi	iew & Submit				
Plea	se review the updated v	alues below to ensure	accuracy.		
	Employee	Current	Value	City Updated Value	Effective Date
1.	Angela Quinn	Shelburne		Bennington	07/05/2016
2.	Abigail Brown	Shelb	ıme	Bennington	07/05/2016
3.	Anna James	Shelb	ıme	Bennington	07/05/2016

9. You can then Review the information one last time before you **Submit** the changes.