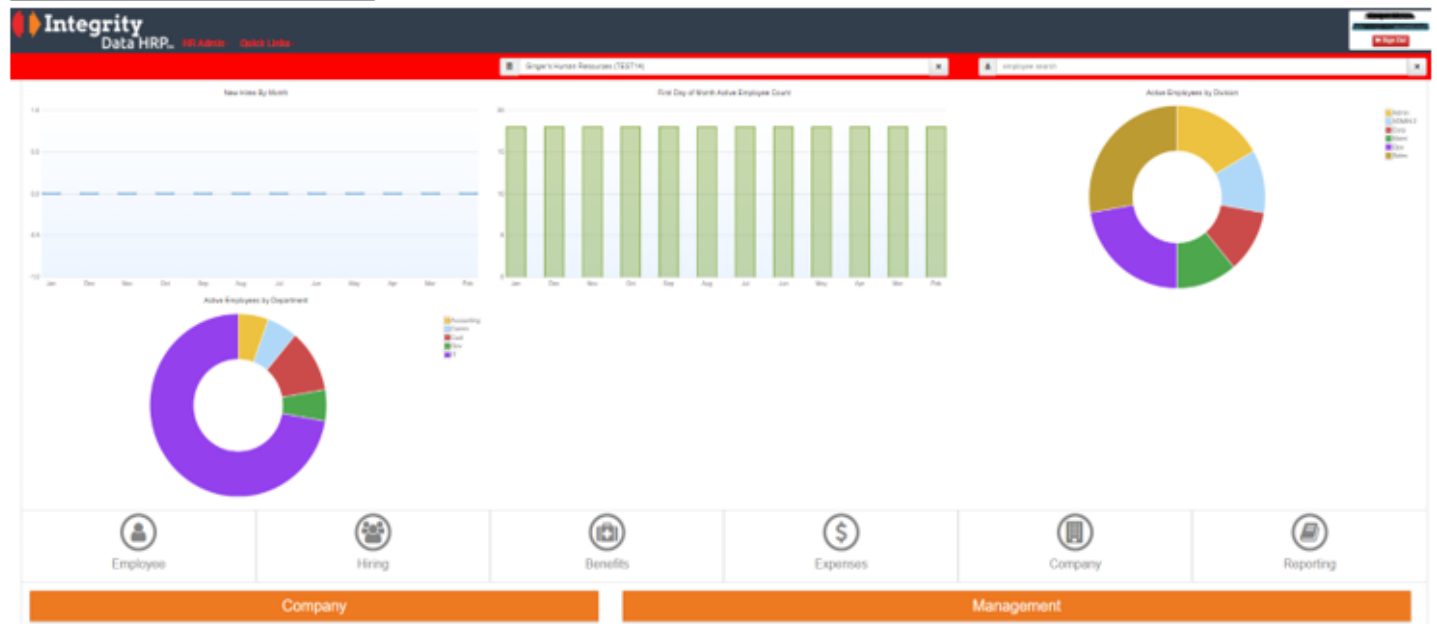


HR Dashboard Overview



Contains 6 tiles and assists with navigation

Employee

Hiring

Benefits

Expenses

Company

Reporting

Employee Tile

Employee Actions

Add New Hire – Add New Hire without using the Applicant Tracking/Onboarding process.

Self-Service Setup – Setup employees to use Self-Service.

Terminate Employee – Process Employee Termination.

Employee Maintenance

Achievement – Add employee achievements

Alternate Rate – Add Alternate rate w/type and with start and stop dates

Certificate – Add employee certifications with Issue and Expiration date (also attach document)

Class – Add education/class with completion and expiration date, (also attach document)

Class (rapid enroll) – can add all employees to a class at the same time/can also specify by department

Compensation – Adjust compensation with rate/type/date/reason

Custom Form – Assign custom form to employee for signature (will stay with employee electronic file)

Direct Deposit Alt – Setup up to 4 direct deposit accounts for employee

Document (employee) – location of electronic forms employee has completed (can add or download forms also)

Document (company) – Company documents can be found here and viewed and/or a report of documents downloaded

Education – Add employee education/degree

Emergency Contact – Add employee emergency contact information

Employment Screening – view employees that have been submitted for screening with client vendor / if vendor other than national crime search, need to check on ability to integrate with that provider (can only access if user has permission/user agreement)

I-9 – Review and approval of I-9 form

License - Add employee license with Issue and Expiration date (also attach document)

Note – Can be used for HR Note on employee or at client discretion (also attach document)

Pay History – Employee pay stubs/pay history

Position Organization – add compliance updates with effective dates/transfer employee to new supervisor and/or department. Reporting is tied to this area should be used for these changes as much as possible

Property – add/or review property issued to employee

Review – Schedule an employee for review

Skill – Add a skill to employee record (also attach document)

W-2 – Review employee W-2 and download

W-4 – Review employee W-4 and download

Hiring Tile

Applicant Tracking

? **Question Bank** - Add/Remove/Activate/Inactivate/update/set sequence of application questions

Status Setup - 12 Applicant Tracking Status workflows – set sequence for the workflow to the Applicant Tracking Dashboard

Form Setup – Applicant Tracking Certification Statements – Can create your own statements or use the sample statement provided

Application Version – Add/Clone/update application questions for specific positions

Job Posting – Add/Clone/update job postings for specific positions w/Req# and set to open/closed and yes/no to job board posting

App Tracking Dashboard – Review applications with status/stage of application and change status/stage of application

Onboarding

? **Question Bank** - Add/Remove/Activate/Inactivate/update/set sequence of application questions

Task List – List of jobs/positions – Complete setup of what to ask for during onboarding, including form signatures, (including custom forms), W4, link custom questions and add a welcome and completion note
I-9, Direct deposit

Onboard Prep – Choose the task list for the position, choose type of employee, (W-2, 1099 contractor) choose position title, hire date, and assign employee ID, compensation, benefits eligibility/position status, department,

Onboarding Dashboard – View employees that are being onboarded and what stage/status they are at in the process.

Can send email if not completing the onboarding to get them to move along. When prep has been completed, will need to be reviewed and approved

Benefits Tile

Plan/Policy – Setup benefit plans/clone benefit plans,

Employee Benefit – Add benefit for employees without a workflow for Life Event/OE/Status Change

Carrier – Add carrier information including contact information

Classes – Employee Benefit class

General Agent – Brooker information

Life Event Reason – Add or change life event reasons

Waiting Rule – Set waiting period rules for benefit plans

Dependents – Add dependent information for employees

Beneficiaries – Add beneficiaries for employees

Open Enrollment Setup – OE title, start, and stop dates, introduction/acknowledgment with e-sign, plans to be included and employees to be included in enrollment

Monitor Open Enrollment – Open Enrollment Dashboard – Review and approve enrollments, can also download enrollments

Copy Benefits – copy benefits from one company to another

Benefit Reports – view benefit reports

Expenses Tile

Expense Management

Custom Expense Type – add expense types for employees to submit for reimbursement

Expense Detail – view submitted expense details

Expense Report – change status of submitted expense report,

(Approved/Cancelled/Pending/Reimbursed/Rejected/Submitted for approval) and download report of submitted expenses

Company Tile

Company

Home – takes you to your HR Dashboard home page

Home Dashboard setup – setup of what you want to see on your Admin dashboard and what you want employees to see in self-service

Announcements – create company announcements that will be displayed on each employee's home dashboard

Company Directory – directory of all Employees with contact information

Company Documents – company information and integration options. New Hire/Onboarding preferences/benefits settings/reason for posting/default applicant security role/Employee self-service role/company logo

Company List – shows all the companies you have and how they are set up, can make, and save changes from here also

IP Restriction – add IP address to whitelist

Organization Chart – view company organizational chart

Security Role View – view employees with their security roles

User List – view user list, add user, activate/inactivate user, assign to company if more than one

Version History – shows release notes from version upgrades

Company Setup

Achievement – add achievement types and active/inactivate them

Certificate – add certification types and active/inactivate them—

Citizenship - add citizenship types and active/inactivate them

Class – add class with title/instructor/duration/time/location/credits to enroll employee into a class

Compensation Change Reason – add compensation change reasons, activate/inactive reason

EEO – view list of EEO types, activate/inactive type

Employment – view, add, activate/inactive employment type

Ethnicity - view, add, activate/inactive ethnicity type

Frequency - view, add, activate/inactive pay frequency

License - view, add, activate/inactive license types

Note Type - view, add, activate/inactive note types

Pay Grade - view, add, activate/inactive pay grade types including pay range/minimum/midpoint/maximum

Pay Group - view, add, activate/inactive pay group

Pay Type - view, add, activate/inactive pay types

Position - view, add, activate/inactive positions

Position/Org Change Reason - view, add, activate/inactive position change reasons

Rate - view, add, activate/inactive rate types

Review - view, add, activate/inactive employee reviews, including scheduling/review instructions, attach company documents, add review questions from question bank

Review question – add review questions, activate/inactivate

Shift – view/add shift type with rate/add to rate/rate multiple, activate/inactivate

Skill – view/add skill type, activate/inactivate

Status – a view/add status type, (active/terminated etc.) activate/inactivate

Termination Reason – view/add termination reason, activate/inactivate

Time Off – if you want to use this function, it DOES NOT FEED to PAYROLL, but you can download in excel and upload to Payroll

Union – view/add union type, activate/inactivate

Work Comp – view/add work comp types, activate/inactivate

Reporting Tile

Standard Reports

Custom Reports

Quick Report Writer

Standard Reports – Prebuilt standard reports with active/inactive status, who can see the report/ run the report (future addition of and/or schedule the report to run on specific date)

Custom Reports – List of custom reports that you have requested be built

Quick Report Writer (QRW) – create reports from prebuilt reports by adding fields to the report that you need, save/run/view report you created

