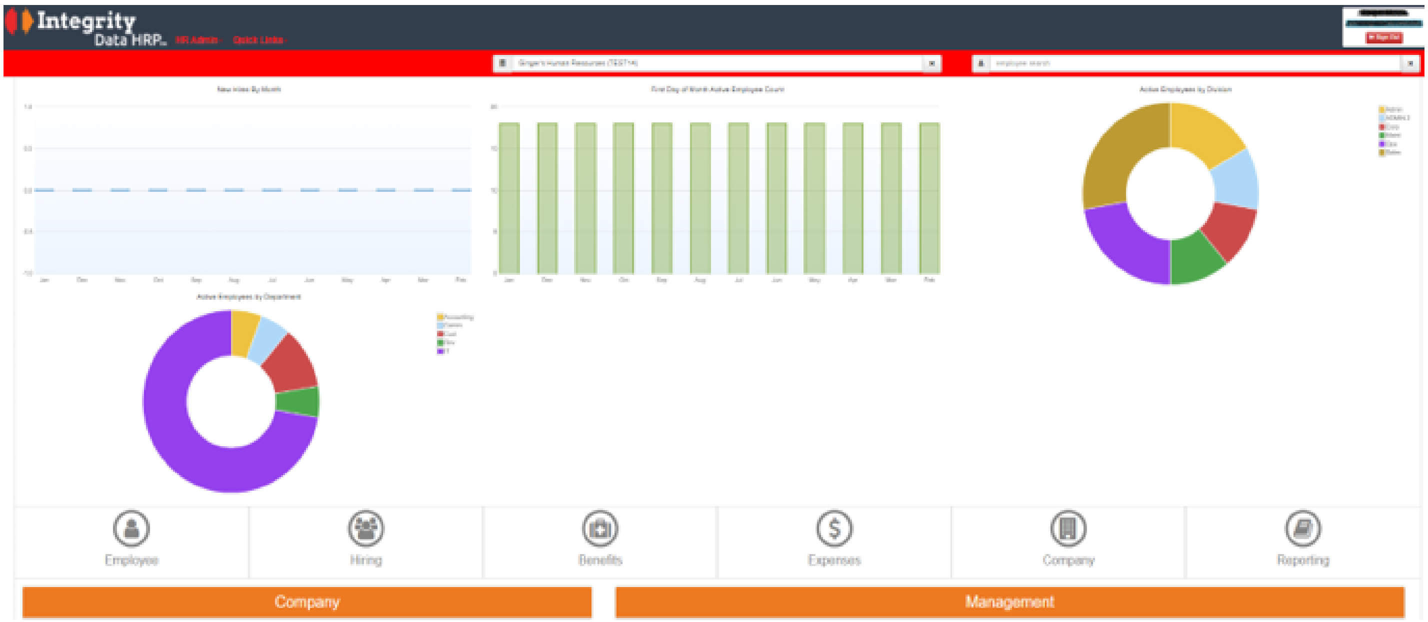
Your people. Our priority.

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/dd 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