Integrity Data

Your people. Our priority.

HRP Order of Operation Setup

Essentials & Full Life Cycle Subscriptions

Company

1.) Set security Roles – You need to make decisions on security roles. Be sure to review what each role can see and keep in mind that the BaseAdmin roll has access to everything in HR, including some company setup fields.

2.) Upload company documents, (ex. Employee Handbook, health insurance forms and/or guides, noncompete agreement) and any company document that you want sent for signature during Onboarding or after. Please be sure that any document that you want to send requesting a PDF Signature, must be uploaded as a PDF, (a word document can't be used for a signature). **If a custom document is needed, additional charges may apply. Please send your document to me so I can get a quote for you.**

IMPOTANT Notations are also listed below, please review

Applicant Tracking

3.) Select/Change/Create application questions, (can start with questions for currently open positions and finish setup at another time).

4.) Select/Change/Create Application Versions for each position, (can start with currently open positions and finish setup at another time).

5.) Applicant Tracking Status Setup contains 15 prebuilt statuses with workflows. Client can change sequence, (order of appearance) and client can add a new status if prebuilt tracking statuses does not meet their needs.

6.) There are 58 prebuilt notification workflows. If more are needed, client can clone a notification that is like what is needed and customize the workflow to fit their requirements.

7.) Create Job Posting

Onboarding

8.) Activate/inactivate or Change/Create Onboarding Questions in the Onboarding Question Bank.

9.) Setup Onboarding Task List for each position, (can use same list for multiple positions).

10.) Review an Approve

11.) Prepare Employee for Onboarding

Termination and Rehire

12.) Add/Change/Remove Termination reason.

13.) Terminate or an Employee

14.) Re-Hire a former Employee

Communication

15.) Review Notifications – Notifications are set to defaults. ***Please Note, some of the defaults may need to be changed from the employee's supervisor/manager to an HR staff member.***

Full Life Cycle Subscription Only
Benefits

***GP Clients only - Please note, if/when benefits are changed, they will update payroll deductions immediately regardless of effective date. Do not approve the elections/changes until the payroll that you want the deductions to change on.**

16.) Copy/Change/Create Benefit Classes.
17.) Copy/Change/Create Carriers.
18.) Copy/Change/Create Plan Policy's. ***Please note, age banded plans do not update automatically, this is a manual process. ***
19.) Review Life Event Reason, Change/Create any others needed.
20.) Review Waiting Rules, Change/Create any others needed.

Compensation Change Reasons

21.) Review/Add/Change Compensation Change Reasons. ***GP Clients only - Please note, compensation changes made in HRP do not flow to payroll at this time. Changes must also be completed in payroll. * There will be a release coming soon to change this process to make the compensation change in HR flow to GP.**

Review Types

22.) Add/Change/Remove review types, (if using).

Review Question Bank

23.) Add/Change/Remove questions from the review question bank, (if using).

*Please Note Full Life Cycle Subscriptions – At a minimum, Benefit Plans should be completed and tested prior to Go Live.

Benefit plans will impact payroll.*