SEE FURTHER
SEE FURTHER
SEE FURTHER

Microsoft Great Plains Dynamics

HUMAN RESOURCES PEOPLE MANAGEMENT

Copyright

Manual copyright © 2001 Great Plains Software, Inc. All rights reserved. Great Plains Software, Inc. is a wholly-owned subsidiary of Microsoft Corporation.

Your right to copy this documentation is limited by copyright law and the terms of the software license agreement. As the software licensee, you may make a reasonable number of copies or printouts for your own use. Making unauthorized copies, adaptations, compilations, or derivative works for commercial distribution is prohibited and constitutes a punishable violation of the law.

Trademarks

Great Plains, Dynamics, eEnterprise, and Dexterity are either registered trademarks or trademarks of Great Plains Software, Inc. in the United States and/or other countries. Great Plains Software, Inc. is a wholly-owned subsidiary of Microsoft Corporation. Microsoft, ActiveX, BackOffice, BizTalk, FrontPage, JScript, Outlook, SourceSafe, Verdana, Visual Basic, Visual C++, Visual C#, Visual InterDev, Visual SourceSafe, Visual Studio, Win32, Windows, and Windows NT are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

The names of actual companies and products mentioned herein may be trademarks or registered marks - in the United States and/or other countries - of their respective owners.

The names of companies, products, people, and/or data used in window illustrations and sample output are fictitious and are in no way intended to represent any real individual, company, product, or event, unless otherwise noted.

Warranty

Great Plains Software, Inc. and Microsoft Corporation disclaim any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose.

Limitation of liability

The content of this manual is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Great Plains Software, Inc. or Microsoft Corporation. Great Plains Software, Inc. and Microsoft Corporation assume no responsibility or liability for any errors or inaccuracies that may appear in this manual. Neither Great Plains Software, Inc., Microsoft Corporation nor anyone else who has been involved in the creation, production or delivery of this documentation shall be liable for any indirect, incidental, special, exemplary or consequential damages, including but not limited to any loss of anticipated profit or benefits, resulting from the use of this documentation or sample code.

License agreement

Use of this product is covered by a license agreement provided by Great Plains Software, Inc. with the software product. If you have any questions, please call the Great Plains Customer Assistance Department at 800-456-0025 or 701-281- 6500.

Publication date May 2001
Part number RDMN-HRP0-00P600

Contents

Introduction **2**

What's in this manual 2

Symbols and conventions 3

Additional resources 5

Part 1: Applicants **8**

Chapter 1: Requisitions and Applicant Costs **9**

Adding a requisition 9

Modifying or deleting a requisition 11

Viewing applicants for a requisition 11

Adding applicant cost information 12

Modifying or deleting applicant cost information 13

Viewing requisition total cost information 14

Chapter 2: Applicant Entry **17**

Adding an applicant record 18

Modifying or deleting applicant information 19

Adding multiple applications 19

Modifying or deleting an application 20

Adding an applicant extra field record 21

Modifying or deleting an applicant extra field record 22

Adding an applicant user-defined record 22

Modifying or deleting an applicant user-defined record 23

Printing an applicant user-defined report 24

Chapter 3: Applicant Background **25**

Adding an applicant education record 25

Modifying or deleting applicant education information 26

Adding an applicant work history record 26

Modifying or deleting applicant work history information 27

Adding an applicant reference record 28

Modifying or deleting an applicant reference 29

Chapter 4: Applicant Skills and Tests **31**
- Adding an applicant skill record 31
- Modifying or deleting an applicant skill record 33
- Querying applicant skills 33
- Creating an applicant skills sub-query 35
- Adding an applicant test record 36
- Modifying or deleting an applicant test record 37

Chapter 5: Interviews, Offers and Hiring **39**
- Adding an interview record 40
- Scoring interviews 41
- Modifying or deleting interview information 41
- Adding an offer 42
- Modifying or deleting an offer 43
- Hiring an applicant 43

Part 2: Employee Maintenance **48**

Chapter 6: Employee Records **49**
- Adding an employee record 49
- Inactivating an employee record 52
- Reactivating an employee record 53
- Modifying or deleting an employee record 54
- Changing an employee’s position 54
- Adding an employee additional information record 56
- Adding an employee address record 57
- Setting up employee Internet information 58
- Adding an employee human resources record 59
- Modifying an employee human resources record 60
- Adding an employee contact record 60
- Modifying or deleting an employee contact record 61
- Viewing or deleting an employee’s positions 62
- Creating an employee additional position record 63
- Viewing or deleting an employee position history record 64
- Adding an employee photo 65

Chapter 7: I-9 Form **67**

Printing the I-9 form and instructions 67

Adding an employee I-9 record 67

Modifying an employee I-9 record 69

Chapter 8: Dependent Records **71**

Adding an employee dependent record 71

Modifying or deleting an employee dependent record 72

Chapter 9: Property Records **73**

Assigning a property item to an employee 73

Returning a property item to inventory 74

Chapter 10: Union Records **75**

Adding an employee union record 75

Modifying or deleting an employee union record 76

Chapter 11: Employee Extra Fields and User-Defined Fields **77**

Adding an employee extra field record 77

Modifying or deleting an employee extra field record 78

Adding an employee user-defined record 79

Modifying or deleting an employee user-defined record 80

Printing an employee user-defined report 80

Chapter 12: Employee Pay Code Maintenance **83**

Viewing employee Human Resources pay code information 83

Adding an employee pay record 85

Part 3: Employee Attendance **90**

Chapter 13: Employee Maintenance and Summary **91**

Adding an attendance employee maintenance record 91

Inactivating an attendance employee maintenance record 93

Deleting an attendance employee maintenance record 93

Viewing employee time code balances 94

Chapter 14: Attendance Transactions **97**

Using attendance 97

Entering or adjusting available attendance hours 98

Creating an attendance transaction 99
Adjusting or deleting an attendance transaction 101
Accruing attendance transactions 101

Chapter 15: Vacation Planning 103
Creating an absence entry transaction 103
Adjusting or deleting an absence entry transaction 105
Creating an absence entry record 105
Modifying or deleting an absence entry record 106
Viewing employee vacation information 107

Chapter 16: Attendance Transaction Transfer and Log 111
Transferring attendance transactions to Payroll 111
Viewing the attendance transaction transfer log 112

Part 4: Employee Benefits 116

Chapter 17: Benefit Enrollment 117
Using the Payroll View for Human Resources 117
Verifying employee benefit enrollment information 118
Enrolling an employee in a health insurance plan 119
Enrolling an employee in a life insurance plan 121
Enrolling an employee in a retirement plan 122
Enrolling an employee in a cash account 124
Adding an employee beneficiary record 126
Completing a benefit or deduction enrollment 128

Chapter 18: Family and Medical Leave Act (FMLA) 131
FMLA limitations 131
Initiating an employee FMLA leave 132
Adjusting an employee’s FMLA leave 134
Viewing FMLA information 135
Entering an FMLA premium due 136
Entering an FMLA payment 137
Adjusting or deleting an FMLA premium or payment 138

Chapter 19: COBRA **141**
Generating a COBRA rights letter 141
Initiating COBRA benefits 142
Tracking a COBRA premium 144
Tracking a COBRA payment 146

Chapter 20: Benefit Summary and History **149**
Viewing employee benefits and deductions 149
Creating a benefit history record 151
Modifying or deleting a benefit history record 152
Viewing benefit history 152

Chapter 21: Total Compensation **155**
Defining a compensation and benefits summary report 155
Importing payroll data from a spreadsheet 157
Importing payroll data from a word processing document 158
Importing information into the Total Compensation / Benefits Summary window 159
Creating a total compensation/ benefits summary report 160
Clearing a total compensation/benefits summary definition 162

Part 5: Employee Assets **166**

Chapter 22: Employee Education **167**
Adding an employee education record 167
Modifying or deleting an employee education record 168

Chapter 23: Employee Skills and Tests **169**
Assigning skills to an employee record 169
Adjusting an employee’s skill record 170
Querying employee skills 171
Creating an employee skills sub-query 173
Creating an employee test record 175
Modifying or deleting an employee test record 176

Part 6: Employee Development **178**

Chapter 24: Employee Orientation **179**

Adding an employee orientation record 179
Modifying or deleting an employee orientation record 181
Completing an employee's orientation 181

Chapter 25: Employee Training **183**

Adding employee names to a training class list 183
Removing employee names from a training class list 184
Adding a group of employee names to a training class list 185
Removing a group of employee names from a training class list 187
Completing an employee training class 187
Viewing class enrollment 188

Part 7: Employee Performance **192**

Chapter 26: Employee Discipline **193**

Adding an employee discipline record 193
Modifying an employee discipline record 195
Closing or deleting an employee discipline record 196
Adjusting or deleting employee discipline points 196

Chapter 27: Employee Grievances **199**

Adding an employee grievance record 199
Modifying an employee grievance record 201
Deleting an employee grievance record 201

Chapter 28: Employee Reviews **203**

Adding an employee review record 203
Entering additional employee review information 205
Scoring employee reviews using numbers 206
Modifying or deleting an employee review record 207

Chapter 29: Employee Injury/Illness **209**

Adding an employee injury or illness record 209
Adding treatment information to an employee injury/illness record 211
Adding additional information to an employee injury/illness record 213

Entering injury cost information 214
Modifying or deleting an employee injury or illness record 215

Part 8: Employee History 218

Chapter 30: Employee Earnings and Position History 219
Viewing or changing or deleting an employee earnings history record 219
Adding an employee position history record 220
Modifying or deleting an employee position history record 222
Viewing an employee position history record 222

Chapter 31: Employee Transfers 225
Adding an employee transfer request record 225
Modifying or deleting an employee transfer request record 226

Chapter 32: Employee Termination 227
Adding an employee termination record 227
Adding an exit interview record 228
Modifying or deleting an employee termination record 229
Completing an employee’s termination record 230

Part 9: Organization Explorer and Salary Matrix 232

Chapter 33: Organization Explorer 233
Viewing organizational information 233
Creating or changing the number of vacancies for a position 234
Creating a new employee record for a position 235
Transferring an employee to a vacant position 236
Creating a new requisition for a position 238

Chapter 34: Salary Matrix 239
Adding a salary matrix 239
Modifying or deleting a salary matrix 241
Updating salary matrices 241

Part 10: Inquiries and Reports 244

Chapter 35: Inquiries 245
Viewing employee information 245
Viewing operating procedures 246
Viewing an employee combined history record 247
Viewing redlined status information 248
Viewing benefit and deduction information 249

Chapter 36: Reports 251
Using the online sample reports 251
Human Resources report summary 251
Report destinations and formats 256
Processing reports on a process server 257
Creating a report option 258
Printing a report with an option 259
Customizing a report 260

Part 11: Utilities 262

Chapter 37: Human Resources Table Maintenance 263
Shrinking a Human Resources table 263
Reconciling Human Resources information 265
Classifying benefit and deduction codes 267

Chapter 38: Human Resources Archive 269
Archiving an applicant record 269
Retrieving an archived applicant record 270
Archiving an employee record 271
Retrieving an archived employee record 272
Deleting an employee record 274

Chapter 39: Human Resources Mail Merge 275
Creating an applicant mail merge file 275
Creating an employee mail merge file 276

Chapter 40: Compensation Management **279**
Analyzing and updating employee compensation 279
Viewing compensation statistics 282

Chapter 41: Desk Accessories **285**
Creating a card catalog record 285
Viewing to do list entries 286
Creating a to do list entry 287
Changing or deleting a to do list entry 288
Viewing personal to do list entries 289
Creating a personal to do list entry 290
Changing or deleting a personal to do list entry 291
Creating or deleting a notepad entry 292

Glossary **295**

Index **299**

Documentation Comment Form **305**

Introduction

Welcome to Human Resources, an important component of Dynamics. You can use Human Resources to set up, enter and maintain most of your employee management needs and to track organizational details within your company.

Once you've set up Human Resources, you can manage the interviewing and hiring of applicants, track the termination, training, and evaluation of employees and track organizational details such as the supervisor, position and department assignment of employees. You also can track the distribution of company property, such as laptop computers and cell phones to employees, create company benefit plans—complete with employee and employer deduction provisions, enroll employees and their dependents in benefits and calculate the benefit value.

This introduction is divided into the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*

What's in this manual

This manual is designed to give you an in-depth understanding of how to use the features of Human Resources and how it integrates with the Dynamics system.

The manual is divided into the following parts:

- Part 1, **Applicants**, provides information needed to create and maintain applicant records.

- Part 2, **Employee Maintenance**, provides information needed to create and maintain employee records.

- Part 3, **Employee Attendance**, provides information needed to maintain employee attendance records.

- Part 4, **Employee Benefits**, provides information needed to maintain employee benefit records.

- Part 5, **Employee Assets**, provides information needed to maintain employee education, skills and test records.
- Part 6, **Employee Development**, provides information needed to maintain employee orientation and training records.
- Part 7, **Employee Performance**, provides information needed to maintain employee discipline, grievance, review and injury/illness records.
- Part 8, **Employee History**, provides information needed to maintain employee transfer, termination, earnings history and position history records.
- Part 9, **Organization Explorer and Salary Matrix**, provides information needed to manage your organization’s positions.
- Part 10, **Inquiries and Reports**, provides information needed to analyze and display the Human Resources information you’ve entered into the system.
- Part 11, **Utilities**, provides information needed to maintain your Human Resources data.

Symbols and conventions

This manual was written using U.S. English. For definitions of unfamiliar terms, see the glossary in this manual or refer to the glossary in online help.

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
💡	The light bulb symbol indicates helpful tips, shortcuts and suggestions.
⚠	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Dynamics may be affected.

Symbol	**Description**
⇄	The integration symbol points out features that are different between Human Resources and Human Resources with Integration to Payroll.

This manual uses the following conventions to refer to sections, navigation and other information.

Convention	**Description**
Creating a batch	Italicized type indicates the name of a section or procedure.
File >> Print	The (>>) symbol indicates a sequence of actions, such as choosing items from a menu, toolbar, or palette, or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
TAB or ENTER	Small capital letters indicate a key or a key sequence.

This manual refers to the following icon buttons.

Icon button	**Description**	**What it does**
📜▾	Benefits button.	Opens additional benefit windows.
✎	Clear icon button.	Clears information.
✕	Delete icon button.	Deletes information.
🔍	Find icon button.	Opens the Find window.
▭▾	Go To button.	Opens other, related windows.
⇦	Insert icon button.	Inserts selected information into a scrolling window.
⇉	Insert All icon button.	Inserts all information into a scrolling window.
◩	Page turn icon button.	Opens another window.
🖨	Print icon button.	Prints a report specific to the window.
⇨	Remove icon button.	Removes selected information from a scrolling window.
⇶	Remove All icon button.	Removes all information from a scrolling window.
💾	Save icon button.	Saves information.

Icon button	Description	What it does
	Select icon button.	Selects highlighted information.

Additional resources

Use the following tools to learn how to use Human Resources. Many of the documentation resources are provided in online format, either as an online help file or as an Adobe Acrobat .PDF file.

To learn about Human Resources reports:

Use the Sample Reports (Help >> Sample Reports) to view samples of Human Resources reports in Adobe Acrobat .PDF format.

To complete day-to-day tasks:

Use the online help (Help >> About This Item –or– press F1) to view context-sensitive assistance for windows, fields, alert messages and procedures.

For this release of Human Resources, only window-level help is provided. To access window-level help, choose F1 or Help >> Contents.

To find information about a window that's not currently displayed, choose Help >> Index, then type the name of the window and choose Display.

Use the online manuals (Help >> Online Manuals) to view the printed manuals online in Adobe Acrobat .PDF format.

To learn about product support services:

For information about the product support options available to you, refer to the Great Plains Services Guidebook (Help >> Great Plains Products and Services >> Guide to Services), available online in Adobe Acrobat .PDF format.

PART 1: APPLICANTS

Part 1: Applicants

This part of the documentation describes how to enter and store applicant information, including requisitions for open positions and transferring applicant information to an employee record.

The following information is discussed:

Chapter 1, "Requisitions and Applicant Costs," explains how to create requisitions for open positions and attach applications to those requisitions.

Chapter 2, "Applicant Entry," describes how to enter information about the candidates who apply for positions within your company and how to track applicant information in extra fields and user-defined windows.

Chapter 3, "Applicant Background," explains how to enter and store information such as an applicant's educational background, work history and references.

Chapter 4, "Applicant Skills and Tests," describes how to enter and access information about your applicants' skills and tests.

Chapter 5, "Interviews, Offers and Hiring," explains how to enter and store unlimited interview information and notes about applicant interviews, offers of employment to applicants and subsequent hirings.

Chapter 1: Requisitions and Applicant Costs

A requisition is a request to fill a position. Each requisition contains the position and department, opening date, costs for advertising and recruiting, the number of positions available and filled and the applicants that have applied for the position.

An applicant cost is any expense associated with an applicant's application for an open position. By tracking the expenses related to each applicant and combining them with requisition expenses, you can get information about the total costs resulting from any requisition in your company.

This information is divided into the following sections:

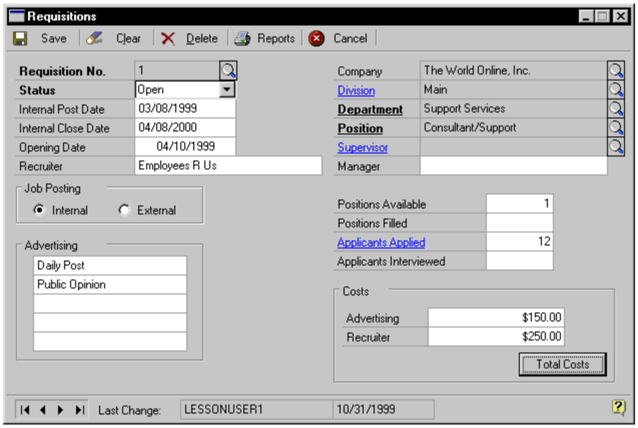
- *Adding a requisition*
- *Modifying or deleting a requisition*
- *Viewing applicants for a requisition*
- *Adding applicant cost information*
- *Modifying or deleting applicant cost information*
- *Viewing requisition total cost information*

Adding a requisition

Use the Requisitions window to add a requisition. A requisition can contain all the applicable information for an open position, such as the status, position and costs associated with the open position. You also can create a requisition using the Organization Explorer window. For more information, refer to *Creating a new requisition for a position* on page 238. To link a requisition to an applicant, refer to *Adding an applicant record* on page 18.

To add a requisition:

1. Open the Requisitions window.
   (Cards >> Human Resources >> Applicant >> Requisitions)



Requisition No.	1
Status	Open
Internal Post Date	03/08/1999
Internal Close Date	04/08/2000
Opening Date	04/10/1999
Recruiter	Employees R Us
Company	The World Online, Inc.
Division	Main
Department	Support Services
Position	Consultant/Support
Supervisor	
Manager	

Job Posting
● Internal ○ External

Advertising
Daily Post
Public Opinion

Positions Available	1
Positions Filled	
Applicants Applied	12
Applicants Interviewed	

Costs

Advertising	$150.00
Recruiter	$250.00

Last Change: LESSONUSER1 10/31/1999

2. Enter or select a requisition number, or accept the default requisition number and select a status.

3. Enter the dates that apply to the requisition, as well as the recruiter for the position(s).

4. Select whether this is an internal or external posting.

5. Select information about the requisition such as the division, department, position, supervisor and manager.

6. Enter information about the number of positions available and filled and the number of applicants interviewed. The number of applicants applied will be updated when you update requisitions. For more information, refer to Reconciling Human Resources information on page 265.

From the Applicants Applied field you can zoom to the Applicant/Requisition Inquiry window. When you select an applicant that has applied for the position, the Applicant window will open where you can view the applicant's record.

7. Enter information about advertising and costs related to the position.

You can view the total costs attached to the requisition by choosing the Total Costs button to open Total Costs window.

8. Choose Save.

Modifying or deleting a requisition

Use the Requisitions window to modify or delete a requisition. You can modify a requisition to reflect changes such as the number of applicants interviewed and the status of the requisition.

To modify or delete a requisition:

1. Open the Requisitions window.
   (Cards >> Human Resources >> Applicant >> Requisition)
2. Enter or select a requisition number.
3. Enter the new information and choose Save.
4. To delete a requisition, choose Delete.

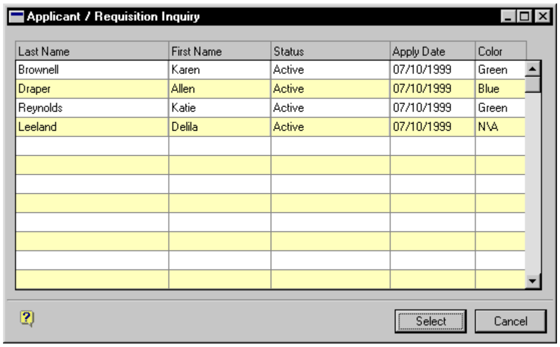
Viewing applicants for a requisition

Use the Applicant / Requisition Inquiry window to view applicants that have applied for an open position. To update the Applicants Applied field, use the Reconcile Human Resources window and update requisitions.

To view applicants for a requisition:

1. Open the Requisitions window.
   (Cards >> Human Resources >> Applicant >> Requisitions)
2. Enter or select a requisition number.

3. Choose the Applicants Applied field to open the Applicant / Requisition Inquiry window.



Applicant / Requisition Inquiry

Last Name	First Name	Status	Apply Date	Color
Brownell	Karen	Active	07/10/1999	Green
Draper	Allen	Active	07/10/1999	Blue
Reynolds	Katie	Active	07/10/1999	Green
Leeland	Delila	Active	07/10/1999	N\A

4. Close the window when you're finished.

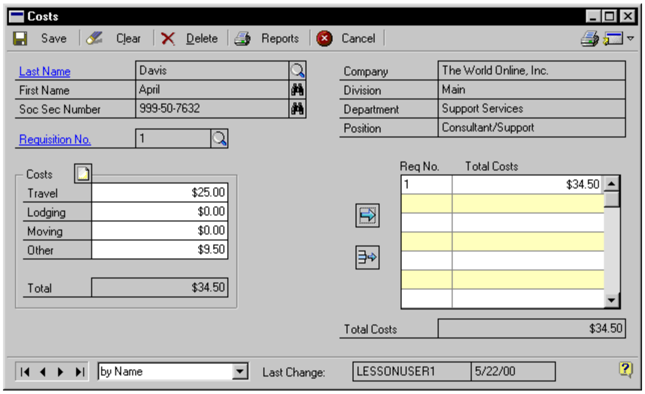
Adding applicant cost information

You can track general requisition expenses like advertising and recruiting costs or specific expenses like travel, lodging and moving costs.

Use the Costs window to add expenses related to an applicant and a position. For more information about applicant total costs, refer to *Viewing requisition total cost information* on page 14.

To add applicant cost information:

1. Open the Costs window.
   (Cards >> Human Resources >> Applicant >> Costs)



Last Name: Davis
First Name: April
Soc Sec Number: 999-50-7632
Requisition No.: 1
Company: The World Online, Inc.
Division: Main
Department: Support Services
Position: Consultant/Support

Costs	
Travel	$25.00
Lodging	$0.00
Moving	$0.00
Other	$9.50
Total	$34.50

Req No.	Total Costs
1	$34.50

Total Costs: $34.50

by Name
Last Change: LESSONUSER1 5/22/00

2. Enter or select an applicant and the requisition number the applicant was applying for when the costs were incurred.

If a position has not been tied to a requisition, you must create a requisition or the costs incurred will not be accrued.

3. Enter the costs in the appropriate fields. You also can use the note button to enter notes about the costs.

4. Choose the insert icon button.

   If an applicant has also applied for another position, you can enter that requisition number and enter the needed information.

5. Choose Save.

Cost information is stored on a per-applicant, per-requisition basis. Use the Total Costs window to view all the costs associated with a particular requisition.

Modifying or deleting applicant cost information

Use the Costs window to modify or delete applicant cost information.

To modify or delete applicant cost information:

1. Open the Costs window.
   (Cards >> Human Resources >> Applicant >> Costs)

2. Enter or select an applicant and a record to modify.

3. To modify cost information, select an item from the total costs scrolling window and choose the select icon button. Make your changes and choose the insert icon button to save your changes.

4. To delete applicant cost information, choose Delete. You will have the option to delete one item or all items.

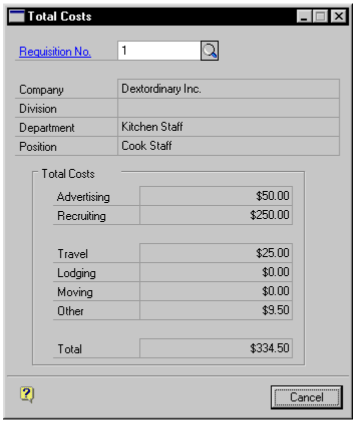
Viewing requisition total cost information

Use the Total Costs window to view total costs per requisition. You can view advertising, recruiting, travel, lodging, moving and other costs for each requisition. The information in the Advertising and Recruiting fields are updated from the Requisitions window. The figures in the Travel, Lodging, Moving and Other fields are the sum of the applicant costs that have been entered for the requisition.

To view requisition total cost information:

1. Open the Requisitions window.
   (Cards >> Human Resources >> Applicant >> Requisitions)

2. Choose Total Costs to open the Total Costs window.



Requisition No.	1
Company	Dextordinary Inc.
Division	
Department	Kitchen Staff
Position	Cook Staff

Total Costs

Advertising	$50.00
Recruiting	$250.00
Travel	$25.00
Lodging	$0.00
Moving	$0.00
Other	$9.50
Total	$334.50

3. Enter or select a requisition number.

Chapter 2: Applicant Entry

After you've opened positions or created requisitions—requests to fill positions—you'll need to enter information about the candidates who apply to fill those positions.

For tracking applicant information that doesn't "fit" into predefined windows, use the Applicant Extra Fields and Applicant User Defined windows.

- The Applicant Extra Fields window allows you to track information in 25 additional fields:
  - Five for storing dates
  - Five for storing numbers
  - Five for storing yes/no information
  - Five for storing dollar figures
  - Five for storing words or phrases
- The Applicant User Defined window allows you track employee information in 36 additional fields:
  - Five "string" fields, for storing characters and numbers
  - Five currency fields, for storing currency amounts
  - Five date fields, for storing dates
  - Five integer fields, for storing whole numbers
  - Ten check box fields, for storing yes/no information
  - Five time fields, for storing time information
  - A notes area, for storing longer text entries

This information is divided into the following sections:

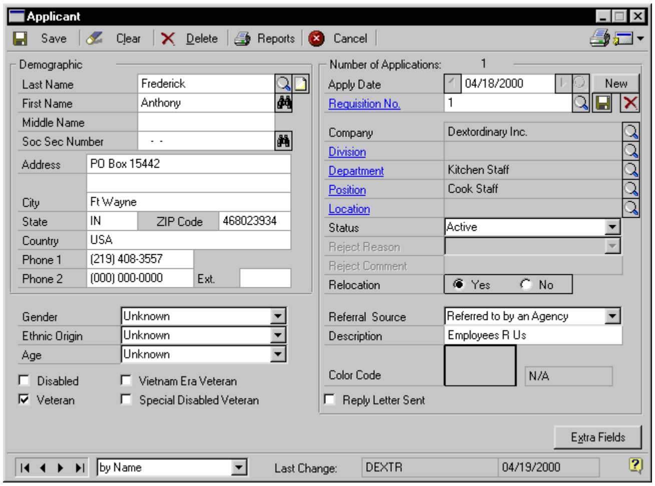
- *Adding an applicant record*
- *Modifying or deleting applicant information*
- *Adding multiple applications*
- *Modifying or deleting an application*
- *Adding an applicant extra field record*
- *Modifying or deleting an applicant extra field record*
- *Adding an applicant user-defined record*
- *Modifying or deleting an applicant user-defined record*
- *Printing an applicant user-defined report*

Adding an applicant record

Use the Applicant window to enter information about applicants. You can organize applicants by position applied for or a color code. This information can be used for reporting purposes.

To add an applicant record:

1. Open the Applicant window.
   (Cards >> Human Resources >> Applicant >> Applicant)



Demographic
Last Name: Frederick
First Name: Anthony
Middle Name:
Soc Sec Number: - -
Address: PO Box 15442
City: Ft Wayne
State: IN
ZIP Code: 468023934
Country: USA
Phone 1: (219) 408-3557
Phone 2: (000) 000-0000
Ext.:
Gender: Unknown
Ethnic Origin: Unknown
Age: Unknown
☐ Disabled
☑ Veteran
☐ Vietnam Era Veteran
☐ Special Disabled Veteran

Number of Applications: 1
Apply Date: 04/18/2000
Requisition No.: 1
Company: Dextordinary Inc.
Division:
Department: Kitchen Staff
Position: Cook Staff
Location:
Status: Active
Reject Reason:
Reject Comment:
Relocation: ● Yes ○ No
Referral Source: Referred to by an Agency
Description: Employees R Us
Color Code: N/A
☐ Reply Letter Sent

by Name
Last Change: DEXTR 04/19/2000

2. Enter the name and demographic information of the applicant.

3. Enter gender, ethnic origin, age, disability and veteran status.

4. Enter or select the number of applications information, including the apply date, the requisition number, and information about the position the applicant is applying for.

5. Select the applicant’s status.

6. Select a referral source and color code for this applicant.

You can enter additional information about an applicant by using the Applicant Extra Fields window. For more information, refer to Adding an applicant extra field record on page 21.

7. Choose Save.

Modifying or deleting applicant information

Use the Applicant window to modify or delete applicant information. You can modify the applicant record to reflect changes such as address and phone information. You also can delete an applicant record.

To modify or delete applicant information:

1. Open the Applicant window.
   (Cards >> Human Resources >> Applicant >> Applicant)

2. Enter or select the applicant record to modify.

3. Highlight the fields to change, enter the new information and choose Save.

   To save an applicant record to access at a later date, archive the applicant record rather than deleting it. For more information about archiving applicants, refer to Archiving an applicant record on page 269.

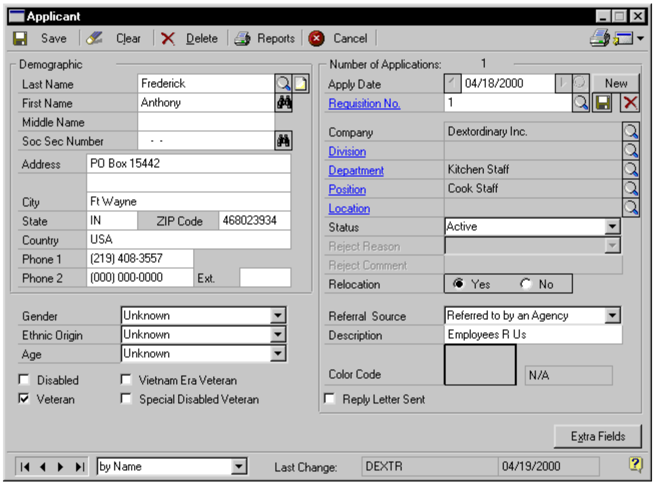
4. To delete an applicant record, choose Delete.

Adding multiple applications

Use the Applicant window to track each application separately if you have received several applications from a candidate. If you enter more than one application for a candidate, the application displayed when you open the Applicant window will be the application that has the most recent Apply Date.

To add multiple applications:

1. Open the Applicant window.
   (Cards >> Human Resources >> Applicant >> Applicant)



Last Name: Frederick
First Name: Anthony
Middle Name:
Soc Sec Number: - -
Address: PO Box 15442
City: Ft Wayne
State: IN ZIP Code: 468023934
Country: USA
Phone 1: (219) 408-3557
Phone 2: (000) 000-0000 Ext.
Gender: Unknown
Ethnic Origin: Unknown
Age: Unknown
☐ Disabled ☐ Vietnam Era Veteran
☑ Veteran ☐ Special Disabled Veteran
Number of Applications: 1
Apply Date: 04/18/2000
Requisition No.: 1
Company: Dextordinary Inc.
Division:
Department: Kitchen Staff
Position: Cook Staff
Location:
Status: Active
Reject Reason:
Reject Comment:
Relocation: ● Yes ○ No
Referral Source: Referred to by an Agency
Description: Employees R Us
Color Code: N/A
☐ Reply Letter Sent
by Name
Last Change: DEXTR 04/19/2000

2. Enter or select the application record.

3. Choose New to select the new position the applicant is applying for and enter the relative information.

4. Choose Save.

Modifying or deleting an application

Use the Applicant window to modify or delete an application. You can modify an application to reflect changes such as applicant status and address.

To modify or delete an application:

1. Open the Applicant window.
   (Cards >> Human Resources >> Applicant >> Applicant)

2. Enter or select the name of the applicant record to delete.

3. Find the correct application by using the Apply Date.

4. Highlight the fields to change, enter the new information and choose Save.

5. To delete the application, choose the delete icon button near the Apply Date field.

Do not choose Delete at the top of the window or the entire applicant record will be deleted.

Adding an applicant extra field record

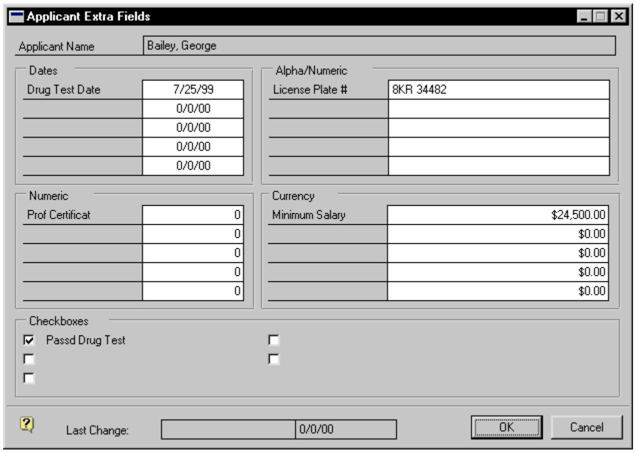
Use the Applicant Extra Fields window to add applicant extra field records. You can track any additional information, like an applicant's professional license number. For more information about setting up the applicant extra fields, refer to *Setting up applicant or employee extra fields* in Chapter 11, "Extra Fields and User Defined Fields Setup," of the Human Resources Installation and Setup manual.

To add an applicant extra field record:

1. Open the Applicant window.
   (Cards >> Human Resources >> Applicant >> Applicant)

2. Enter or select an applicant.

3. Choose Extra Fields to open the Applicant Extra Fields window.



Applicant Name: Bailey, George

Drug Test Date: 7/25/99
0/0/00
0/0/00
0/0/00
0/0/00

License Plate #: 8KR 34482

Prof Certificat: 0
0
0
0
0

Minimum Salary: $24,500.00
$0.00
$0.00
$0.00
$0.00

☑ Passd Drug Test
☐
☐
☐
☐

Last Change: 0/0/00

4. Enter the information in the fields.

5. Choose Save.

Modifying or deleting an applicant extra field record

Use the Applicant Extra Fields window to modify or delete an applicant extra field record.

To modify or delete an applicant extra field record:

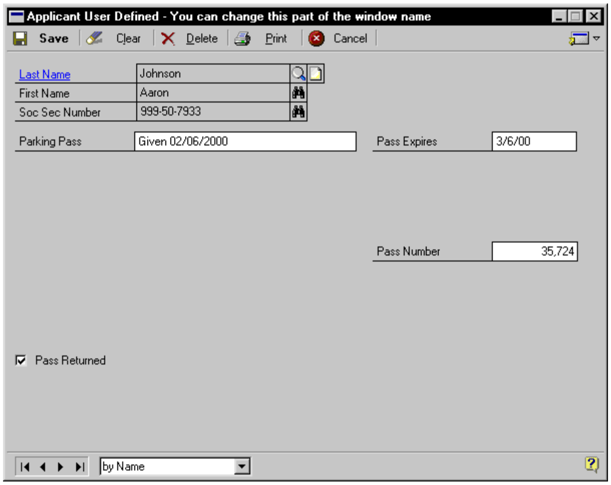
1. Open the Applicant window.
   (Cards >> Human Resources >> Applicant >> Applicant)
2. Enter or select an applicant record.
3. Choose Extra Fields to open the Applicant Extra Fields window.
4. Make your changes and choose Save.
5. To delete an applicant extra fields record, choose Delete.

Adding an applicant user-defined record

Use the Applicant User Defined window to add an employee user-defined record. You can track any additional information, like security checks or drug testing results. The window name created in the Applicant User Defined Setup window is the name that will be displayed. For more information, refer to *Adding an applicant user-defined record* in Chapter 11, "Extra Fields and User Defined Fields Setup," of the Human Resources Installation and Setup manual.

To add an applicant user-defined record:

1. Open the Applicant User Defined window.
   (Cards >> Human Resources >> Applicant >> User Defined)


Applicant User Defined - You can change this part of the window name
Save
Clear
Delete
Print
Cancel

Last Name: Johnson
First Name: Aaron
Soc Sec Number: 999-50-7933
Parking Pass: Given 02/06/2000
Pass Expires: 3/6/00
Pass Number: 35,724
☑ Pass Returned
by Name

2. Enter or select an applicant record. If you didn’t mark Multi Record in the Applicant User Defined Setup window, skip to Step 3.

   If you marked chose to allow Multi Record in the Applicant User Defined Setup window, the window will automatically open with the Record Number field set at 1.

   - To enter information for Record 1, proceed with step 3.

   - To create another record, use the browse buttons on the Record Number field until you reach the record number you need to create.

3. Enter information in the fields.

4. Choose Save.

Modifying or deleting an applicant user-defined record

Use the Applicant User Defined window to modify or delete applicant user-defined records.

To modify or delete an applicant user-defined record:

1. Open the Applicant User Defined window.
   (Cards >> Human Resources >> Applicant >> User Defined)

2. Enter or select an applicant record.

3. If you marked Multi Record in the Applicant User Defined Setup window, use the browse buttons on the Record Number field to select the record you want to change.

4. Make your changes and choose Save.

5. To delete an applicant user-defined record, choose Delete.

Printing an applicant user-defined report

Use the Applicant User Defined window to print reports for user-defined information.

To print an applicant user-defined report:

1. Open the Applicant User Defined window.
   (Cards >> Human Resources >> Applicant >> User Defined)

2. Choose Print. The report will be printed or the Report Destination window will open, depending on your report destination user preferences.

Chapter 3: Applicant Background

Compiling information about the applicant's background is an important part of the hiring process. You can enter and store information such as an applicant's educational background, work history and references.

This information is divided into the following sections:

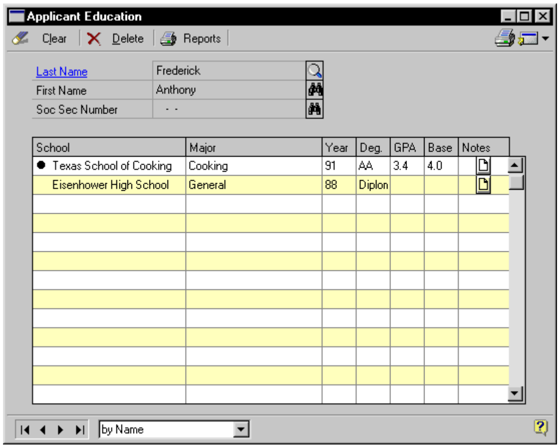
- *Adding an applicant education record*
- *Modifying or deleting applicant education information*
- *Adding an applicant work history record*
- *Modifying or deleting applicant work history information*
- *Adding an applicant reference record*
- *Modifying or deleting an applicant reference*

Adding an applicant education record

Use the Applicant Education window to enter and store information about an applicant's education background, such as schools attended, majors, degrees and grade point averages.

To add an applicant education record:

1. Open the Applicant Education window.
   (Cards >> Human Resources >> Applicant >> Education)



Last Name Frederick
First Name Anthony
Soc Sec Number - -

School	Major	Year	Deg.	GPA	Base	Notes
● Texas School of Cooking	Cooking	91	AA	3.4	4.0	
Eisenhower High School	General	88	Diplon			

2. Enter or select an applicant record.

3. Enter the information in each row and column. You can choose the note button in each row to add additional information.

Modifying or deleting applicant education information

Use the Applicant Education window to modify or delete applicant education information.

To modify or delete applicant education information:

1. Open the Applicant Education window.
   (Cards >> Human Resources >> Applicant >> Education)

2. Enter or select an applicant record.

3. Make the changes and choose Save.

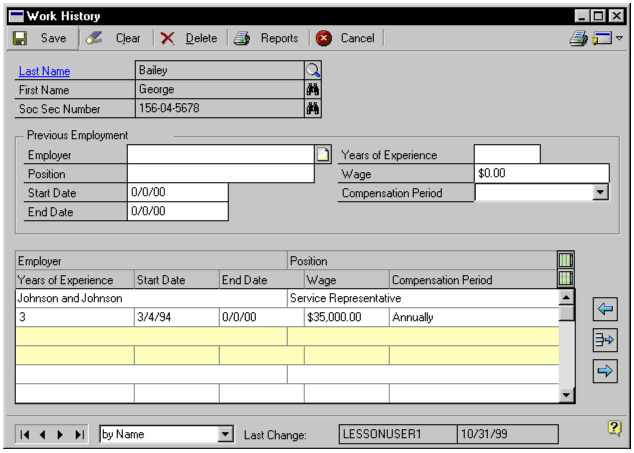
4. To delete, select the record to delete. You can delete one item or all items. A black dot will appear next to the records you've selected to delete. Choose Delete.

Adding an applicant work history record

Use the Work History window to enter and store unlimited information about an applicant's previous work history. You can store information about past employment, such as employers and positions.

To add an applicant work history record:

1. Open the Work History window.
   (Cards >> Human Resources >> Applicant >> Work History)



Last Name	Bailey
First Name	George
Soc Sec Number	156-04-5678
Employer	
Position	
Start Date	0/0/00
End Date	0/0/00
Years of Experience	
Wage	$0.00
Compensation Period	

Employer			Position	
Years of Experience	Start Date	End Date	Wage	Compensation Period
Johnson and Johnson			Service Representative	
3	3/4/94	0/0/00	$35,000.00	Annually

by Name
Last Change: LESSONUSER1 10/31/99

2. Enter or select an applicant record.

3. Enter the previous employment information for the applicant.

4. Choose the insert icon button to save. You can continue to add other work history records.

5. Close the window when you’re finished.

Modifying or deleting applicant work history information

Use the Work History window to modify or delete applicant work history information.

To modify or delete applicant work history information:

1. Open the Work History window.
   (Cards >> Human Resources >> Applicant >> Work History)

2. Select the applicant work history record to modify and choose the select icon button.

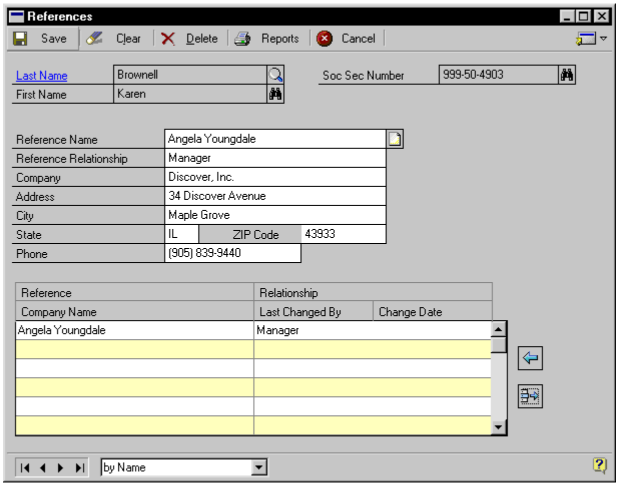
3. Make the changes and choose Save or the insert icon button.
4. To delete applicant work history information, select the applicant record and choose Delete. You will have the option to delete one item or all items.
5. Close the window when you're finished.

Adding an applicant reference record

Use the References window to enter and store references for an applicant. You can enter reference name, company and address information as well as additional notes for each reference.

To add an applicant reference record:

1. Open the References window.
(Cards >> Human Resources >> Applicant >> References)



Last Name	Brownell
First Name	Karen
Soc Sec Number	999-50-4903
Reference Name	Angela Youngdale
Reference Relationship	Manager
Company	Discover, Inc.
Address	34 Discover Avenue
City	Maple Grove
State	IL
ZIP Code	43933
Phone	(905) 839-9440

Reference	Relationship	
Company Name	Last Changed By	Change Date
Angela Youngdale	Manager	

by Name

2. Enter or select the applicant record.
3. Enter the name of the reference and relationship information.
4. Choose the insert icon button. You can continue to enter additional references.
5. Close the window when you're finished.

Modifying or deleting an applicant reference

Use the References window to modify or delete an applicant reference.

To modify or delete an applicant reference:

1. Open the References window.
   (Cards >> Human Resources >> Applicant >> References)

2. Enter or select the applicant record.

3. Highlight a record and choose the select icon button.

4. Make the changes in the appropriate fields and choose Save or choose the insert icon button.

5. To delete the record, choose Delete. You will have the option to delete one item or all items.

Chapter 4: Applicant Skills and Tests

Use the Applicant Skills window to enter and retrieve information about your applicants' skills, such as skill proficiences and comments. You can query applicants' skills and continue to narrow the list of eligible applicants for a position by completing a sub-query.

Because applicants have all types of training, education, skills and work experience, pre-employment testing can be a good way to make comparisons between applicants. The Applicant Tests window allows you to enter and store information about applicant tests, such as the date the tests were taken and the test scores received.

Skill and test records for any applicants that you hire using the Hire window will be transferred automatically to the employee skill and test records.

This information is divided into the following sections:

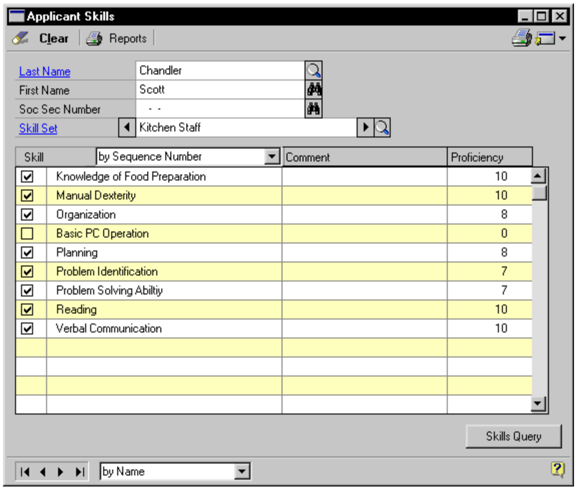
- *Adding an applicant skill record*
- *Modifying or deleting an applicant skill record*
- *Querying applicant skills*
- *Creating an applicant skills sub-query*
- *Adding an applicant test record*
- *Modifying or deleting an applicant test record*

Adding an applicant skill record

Use the Applicant Skills window to assign skills to applicants. Skills must be part of a skill set to be assigned to an applicant. For more information, refer to *Defining a skill* and *Creating a skill set* in Chapter 4, "Applicant Skills and Tests," of the Human Resources Installation and Setup manual.

To add an applicant skill record:

1. Open the Applicant Skills window.
   (Cards >> Human Resources >> Applicant >> Skills)



Last Name: Chandler
First Name: Scott
Soc Sec Number: - -
Skill Set: Kitchen Staff

	Skill (by Sequence Number)	Comment	Proficiency
☑	Knowledge of Food Preparation		10
☑	Manual Dexterity		10
☑	Organization		8
☐	Basic PC Operation		0
☑	Planning		8
☑	Problem Identification		7
☑	Problem Solving Abiltiy		7
☑	Reading		10
☑	Verbal Communication		10

2. Enter or select an applicant record.

3. Enter or select a skill set. The scrolling window will display the skills that are part of the skill set.

4. Mark the skills an applicant has.

Applicant skills carry from one skill set to the next. When you enter information about an applicant's proficiency for a skill, you will see that information in all skill sets that include that skill.

5. Enter comments about an applicant's skill, if necessary.

6. Enter a proficiency rating for a skill, if necessary. Usually, the higher the proficiency rating, the greater the skill.

7. Continue to enter the skills the employee has for the skill set.

8. Close the window when you're finished.

Modifying or deleting an applicant skill record

Use the Applicant Skills window to modify or delete applicant skill information. You can modify the applicant skill record if the applicant gains another skill.

To modify an applicant skill record:

1. Open the Applicant Skills window.
   (Cards >> Human Resources >> Applicant >> Skills)
2. Enter or select an applicant record.
3. Enter or select a skill set.
4. Make your changes and close the window.

To delete an applicant skill record:

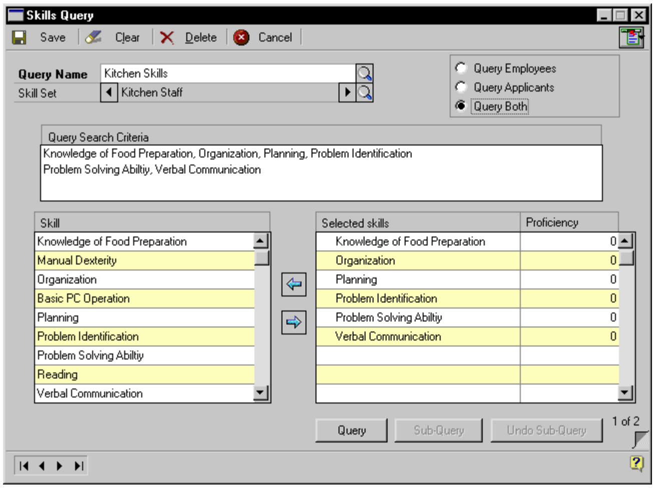
1. Open the Applicant Skills window.
   (Cards >> Human Resources >> Applicant >> Skills)
2. Enter or select an applicant record.
3. Unmark skills in that skill set.
4. Repeat steps 2 and 3 for each skill set that contains skills to delete.
5. Close the window.

Querying applicant skills

Use the Skills Query window to search for applicants that meet a certain skill criteria. Each query you build includes only the applicants that have all of the skills in the query.

To query applicant skills:

1. Open the Skills Query window.
   (Cards >> Human Resources >> Applicant >> Skills >> Skills Query)



Query Name Kitchen Skills
Skill Set Kitchen Staff

○ Query Employees
○ Query Applicants
● Query Both

Query Search Criteria
Knowledge of Food Preparation, Organization, Planning, Problem Identification
Problem Solving Abiltiy, Verbal Communication

Skill
Knowledge of Food Preparation
Manual Dexterity
Organization
Basic PC Operation
Planning
Problem Identification
Problem Solving Abiltiy
Reading
Verbal Communication

Selected skills	Proficiency
Knowledge of Food Preparation	0
Organization	0
Planning	0
Problem Identification	0
Problem Solving Abiltiy	0
Verbal Communication	0

2. Enter or select a query name.

3. Enter or select a skill set.

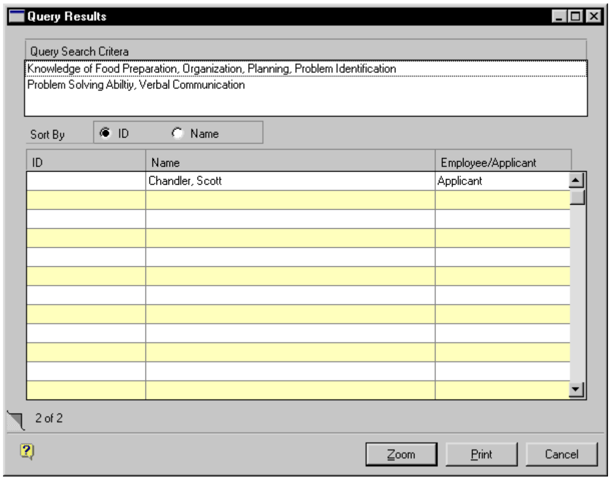
4. Mark Query Applicant to search the applicant records. You also can search within applicant, employee or both applicant and employee records.

5. Select a skill and choose the insert icon button to add it to the Selected skills. The skill also will be displayed in the Query Search Criteria window. You can insert multiple skills.

6. Enter a minimum proficiency level in the Proficiency column if the applicants need to have a minimum proficiency at this skill.

7. Choose Query.

   If the query does not find a match, a message will appear telling you this. If one or more matches are found, the Query Results window will open and the names of the applicants that match the query will appear. You can select one of the records and choose the Zoom button to open the Applicant window where you can view more applicant information.



Query Search Critera
Knowledge of Food Preparation, Organization, Planning, Problem Identification
Problem Solving Abiltiy, Verbal Communication

Sort By ● ID ○ Name

ID	Name	Employee/Applicant
	Chandler, Scott	Applicant

2 of 2

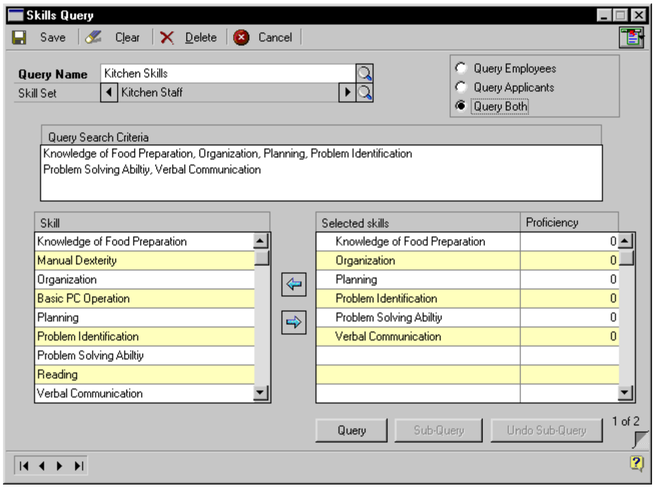
8. Choose Save.

Creating an applicant skills sub-query

Once you’ve completed a query, you can narrow the list of eligible applicants for a position by completing a sub-query. Use the Skills Query window to create a skills sub-query.

To create an applicant skills sub-query:

1. Complete a query as described in Querying applicant skills on page 33, and return to the Skills Query window once the report has been generated.



Query Name Kitchen Skills
Skill Set Kitchen Staff

○ Query Employees
○ Query Applicants
● Query Both

Query Search Criteria
Knowledge of Food Preparation, Organization, Planning, Problem Identification
Problem Solving Abiltiy, Verbal Communication

Skill
Knowledge of Food Preparation
Manual Dexterity
Organization
Basic PC Operation
Planning
Problem Identification
Problem Solving Abiltiy
Reading
Verbal Communication

Selected skills	Proficiency
Knowledge of Food Preparation	0
Organization	0
Planning	0
Problem Identification	0
Problem Solving Abiltiy	0
Verbal Communication	0

2. In the Skills Query window, choose the Sub-Query button. The skills from the first query will be removed from the selected skills list but will remain in the Query Search Criteria window.

3. Select a skill set that contains the skills you're looking for.

4. Highlight a skill to query and choose the insert icon button to add it to the selected skills list. You also can add minimum proficiencies.

5. Choose Query. The same windows will appear as they did with the first query.

6. Choose Save to save the query criteria.

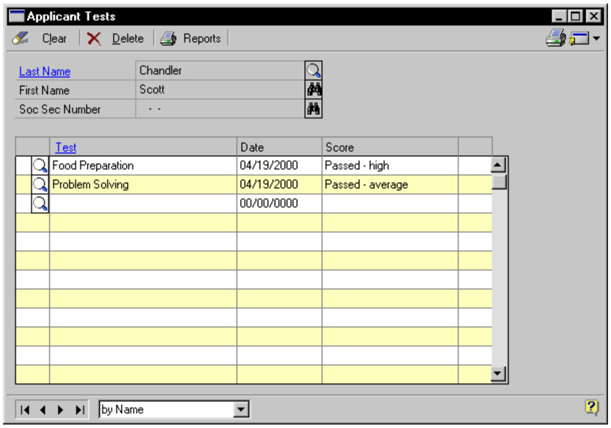
You can complete several layers of sub-queries, to narrow the list of eligible applicants. You can use the Undo Sub-Query button to undo a sub-query.

Adding an applicant test record

Use the Applicant Tests window to enter applicant test information. You can track test scores and comments.

To add an applicant test record:

1. Open the Applicant Tests window.
   (Cards >> Human Resources >> Applicant >> Tests)



Last Name	Chandler
First Name	Scott
Soc Sec Number	- -

Test	Date	Score
Food Preparation	04/19/2000	Passed - high
Problem Solving	04/19/2000	Passed - average
	00/00/0000	

2. Enter or select an applicant record.
3. In the test column, select a test the applicant has taken.
4. Enter the date the test was administered.
5. Enter the applicant’s score. You also can enter the total possible score, such as “95 of 100.”
6. Choose the notes button to add comments about a particular test.
7. Continue adding the applicant’s tests scores.
8. Close the window when you’re finished.

Modifying or deleting an applicant test record

Use the Applicant Tests window to delete or modify test information. You can modify an applicant test record to reflect changes such as new tests taken.

To modify or deleting an applicant test record:

1. Open the Applicant Tests window.
   (Cards >> Human Resources >> Applicant >> Tests)

2. Enter or select an applicant test and select a record.

3. Make your changes.

4. To delete an applicant test record, choose Delete. You will have the option to delete one item or all items.

To delete all items, choose Delete after selecting an applicant.

Chapter 5: Interviews, Offers and Hiring

You can tailor interviews to different types of applicants, requisitions or positions by creating different interview "forms" based on the type of position open. You also can arrange the sequence in which the interview questions will appear and apply weights to different interview topics to place more emphasis on critical aspects of the interview, and less emphasis on other issues.

Using the Applicant Interview Rating window, you can enter and store unlimited interview information—even multiple interviews with a single candidate—and unlimited notes about applicant interviews, including specific notes about each applicant's response to each question.

After completing interviews, you can organize and track your offers to applicants and subsequent hirings.

Hiring an applicant can often be a time-consuming process. However, once you enter and save information in the Hire window, several events will occur. Demographic and Equal Employment Opportunity (EEO) information about the applicant is transferred to the employee files, so the new employee's record can be opened in the Employee window.

Education and skill records are transferred and become part of the employee record. If the new employee's position has been tied to a review form, the date of the next review will be calculated and entered in the employee record.

All information tied to the position description (such as company, division, department, supervisor, etc.) also becomes part of the employee's record. The employee's first Date of Next Review will be set to the default date if the position the employee has been hired for is tied to a review schedule.

This information is divided into the following sections:

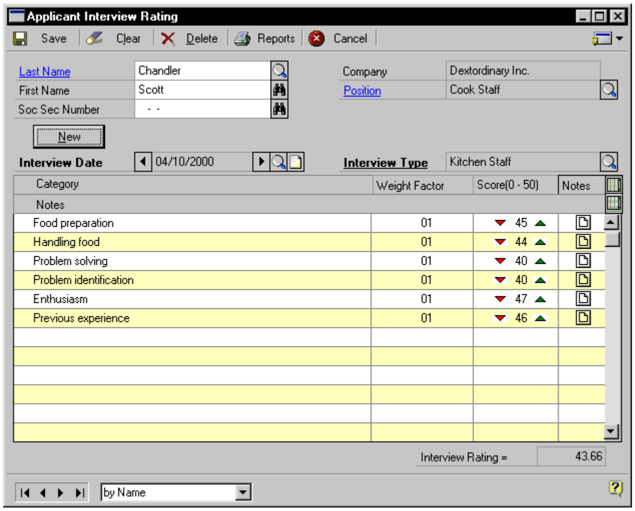
- *Adding an interview record*
- *Scoring interviews*
- *Modifying or deleting interview information*
- *Adding an offer*
- *Modifying or deleting an offer*
- *Hiring an applicant*

Adding an interview record

To enter interview information, use the Applicant Interview Rating window. You can record the interview date, score and additional interview notes.

To add an interview record:

1. Open the Applicant Interview Rating window.
   (Cards >> Human Resources >> Applicant >> Interviews)



Last Name: Chandler
First Name: Scott
Soc Sec Number: - -
Company: Dextordinary Inc.
Position: Cook Staff
Interview Date: 04/10/2000
Interview Type: Kitchen Staff

Category Notes	Weight Factor	Score(0 - 50)	Notes
Food preparation	01	45	
Handling food	01	44	
Problem solving	01	40	
Problem identification	01	40	
Enthusiasm	01	47	
Previous experience	01	46	

Interview Rating = 43.66

2. Select an applicant record.

3. Accept the position default or select a different position.

4. Choose New to create a new interview record.

5. Enter an interview date and select the interview type.

6. Enter the applicant's scores for each category. The applicant's total score will appear in the Interview Rating field at the bottom of the screen. For more information about applicant's scores, refer to *Scoring interviews* on page 41.

7. You can enter notes for each category in the scrolling window and by using the notes buttons.

To view the notes of each category use the hide and show buttons.

8. Choose Save.

Scoring interviews

An interview “score” is generated for each applicant interview. The score an applicant receives for an interview is the total of the scores the applicant receives in each category. Those scores are the applicant’s category scores multiplied by the weight given that particular category.

For example, assume the following categories and weights were entered in the Applicant Interview Rating window for an interview:

Category	**Weight**
Review of Resume	1
Why this company?	1
Why this position?	1
Strengths/weaknesses	2
Why should we hire you?	0

An applicant scored 8, 6, 7, 10 and 9 in each category, respectively. The interview score for each category and the final interview score are calculated below.

- Review of Resume 8 x 1 = 8
- Why this company? 6 x 1 = 6
- Why this position? 7 x 1 = 7
- Strengths/weaknesses 10 x 2 = 20
- Why should we hire you? 9 x 0 = 0

To calculate the final score, add each of the category scores: 8 + 6 + 7+ 20 + 0= 41. Then divide this number by the total number of categories: 41/5 = 8.2.

Modifying or deleting interview information

Use the Applicant Interview Rating window to modify or delete interview information. You can modify an applicant record to reflect changes such as additions to notes.

To modify or delete interview information:

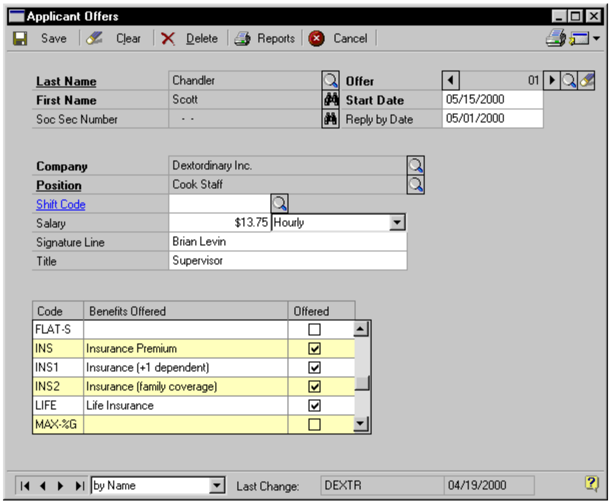
1. Open the Applicant Interview Rating window.
   (Cards >> Human Resources >> Applicant >> Interviews)
2. Select an applicant record.
3. Select an interview date for the record.
4. Highlight the field to change and enter the information. Choose Save.
5. To delete applicant interview information, choose Delete.

Adding an offer

Use the Applicant Offers window to create records of the offers you extend to successful candidates. Your offers can include other arrangements, like benefits. You also can extend multiple offers to a single candidate.

To add an offer:

1. Open the Applicant Offers window.
   (Cards >> Human Resources >> Applicant >> Offers)



Last Name Chandler
First Name Scott
Soc Sec Number - -
Offer 01
Start Date 05/15/2000
Reply by Date 05/01/2000

Company Dextordinary Inc.
Position Cook Staff
Shift Code
Salary $13.75 Hourly
Signature Line Brian Levin
Title Supervisor

Code	Benefits Offered	Offered
FLAT-S		☐
INS	Insurance Premium	☑
INS1	Insurance (+1 dependent)	☑
INS2	Insurance (family coverage)	☑
LIFE	Life Insurance	☑
MAX-%G		☐

by Name
Last Change: DEXTR 04/19/2000

2. Enter or select the applicant. An offer number automatically will be generated.

3. Enter the date the person will begin work in the Start Date field.

4. Enter the date the applicant should reply by.

5. Select the position you are offering and enter salary and shift code information.

   If you have tied the position to a company, that information automatically will be filled. Otherwise, use the lookup button on the Company field to select the company that would employ the applicant.

6. Enter the name and title of the person who will sign the applicant's offer letter in the Signature Line and Title fields.

7. Mark which benefits are offered as part of the package.

8. Choose Save.

   If you have entered a reply by date, the To Do Entry window will open where you can set up a reminder of when the applicant's response is due. If you mark the Post Early Reminder box, you can enter the number of days in advance you would like to receive a reminder.

Modifying or deleting an offer

Use the Applicant Offers window to modify or delete an offer.

To modify or delete an offer:

1. Open the Applicant Offers window.
   (Cards >> Human Resources >> Applicant >> Offers)

2. Enter or select an applicant offer record to delete or modify.

3. Select the number of the offer record to change.

4. Make the changes and choose Save.

5. To delete an offer, choose Delete.

Hiring an applicant

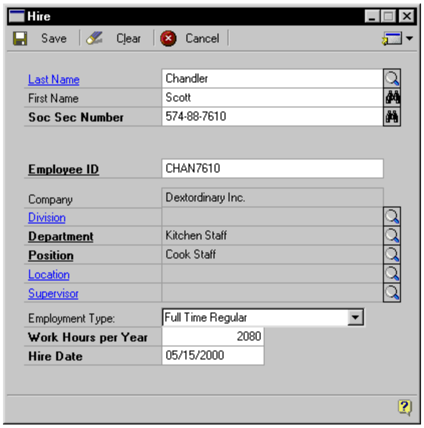
You can use the Hire window to enter hiring information for an applicant. The applicant's skills will be transferred and will be part of the new employee record that is created. Any skill entries you add to the employee's record, however, will not be viewable in that person's applicant record.

Use the Hire window to change an applicant's status to employee status once he or she has been hired.

Entering applicant information in the Hire window does not remove the new hire from the list of applicants.

To hire an applicant:

1. Open the Hire window.
   (Cards >> Human Resources >> Applicant >> Hire)



Last Name	Chandler
First Name	Scott
Soc Sec Number	574-88-7610
Employee ID	CHAN7610
Company	Dextordinary Inc.
Division	
Department	Kitchen Staff
Position	Cook Staff
Location	
Supervisor	
Employment Type:	Full Time Regular
Work Hours per Year	2080
Hire Date	05/15/2000

2. Enter or select the applicant to hire and enter a new employee ID number

3. Select the information about the new employee's position in the company.

You can retrieve information about only the company you are logged in to.

4. Select the type of position the employee is being hired for.

5. Enter the hours you expect the employee to work per year. For example, full time employees in many organizations work 2080 hours per year.

6. Enter the hire date.

7. Choose Save.

You can enter additional employee information once you have saved the hire record. For more information, refer to Modifying or deleting an employee record on page 54.

PART 2: EMPLOYEE MAINTENANCE

Part 2: Employee Maintenance

This part of the documentation describes how to enter and store employee information, including personal, I-9, dependent, property, union and pay code information. It also explains how to use employee extra fields and user-defined fields to store additional employee information.

The following information is discussed:

Chapter 6, "Employee Records," explains how to enter information about employees and their positions and how to link to additional information, such as pay codes, attendance, tax and contact information. You also can open most of the windows you'll need to manage employee records from the Employee Maintenance window.

Chapter 7, "I-9 Form," describes how to record I-9 information for each employee.

Chapter 8, "Dependent Records," explains how to enter information about employee dependents.

Chapter 9, "Property Records," describes how to enter information about property loaned to an employee.

Chapter 10, "Union Records," explains how to record employee union activity.

Chapter 11, "Employee Extra Fields and User-Defined Fields," explains how to enter additional information about employees.

Chapter 12, "Employee Pay Code Maintenance," describes how to create and change employee pay code records.

Chapter 6: Employee Records

Employee records are the foundation of your Human Resources system. The information you enter can be used to track employees, personal information and to print reports. It's important to keep up-to-date information to reflect your company's current activity.

You can use employee classes when entering employee records to supply default values for many fields. For more information about creating employee classes, refer to Chapter 5, "Setting up Employee Classes, " in the Payroll manual.

This information is divided into the following sections:

- *Adding an employee record*
- *Inactivating an employee record*
- *Reactivating an employee record*
- *Modifying or deleting an employee record*
- *Changing an employee's position*
- *Adding an employee additional information record*
- *Adding an employee address record*
- *Setting up employee Internet information*
- *Adding an employee human resources record*
- *Modifying an employee human resources record*
- *Adding an employee contact record*
- *Modifying or deleting an employee contact record*
- *Viewing or deleting an employee's positions*
- *Creating an employee additional position record*
- *Viewing or deleting an employee position history record*
- *Adding an employee photo*

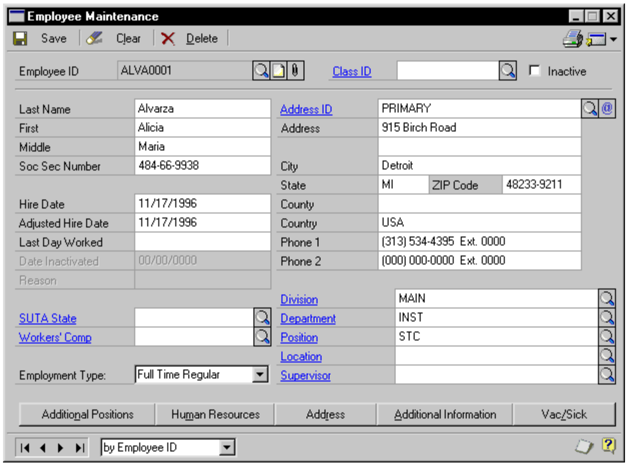
Adding an employee record

Use the Employee Maintenance window to create an employee record. When creating your first employee record, consider how you want to arrange your current and future employee records. You may want to assign specific groups of identification numbers or other types of IDs to different types of employees. Once you've determined the most appropriate numbering system for your employee records, use it consistently for the best results when printing reports and using other Human Resources windows.

You can use descriptions or codes to identify the division, department, position, location and supervisor fields by setting user preferences. For more information, refer to *Setting up Human Resources user preferences* in Chapter 3, "Human Resources Preferences," in the Human Resources Installation and Setup manual.

To create an employee record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)



Employee ID ALVA0001
Class ID
☐ Inactive
Last Name Alvarza
First Alicia
Middle Maria
Soc Sec Number 484-66-9938
Hire Date 11/17/1996
Adjusted Hire Date 11/17/1996
Last Day Worked
Date Inactivated 00/00/0000
Reason
SUTA State
Workers' Comp
Employment Type: Full Time Regular
Address ID PRIMARY
Address 915 Birch Road
City Detroit
State MI ZIP Code 48233-9211
County
Country USA
Phone 1 (313) 534-4395 Ext. 0000
Phone 2 (000) 000-0000 Ext. 0000
Division MAIN
Department INST
Position STC
Location
Supervisor
by Employee ID

2. Enter an employee ID.

   To ensure information on reports will be printed in the correct order, be sure that each employee ID has the same number of characters. The characters are sorted from left to right, and numbers take priority over letters.

   If you don't use the same number of characters for employees IDs, the numbering system won't be consistent and your employee IDs may not be listed in the order you intended.

3. Enter or select a class ID to assign this employee to a class and choose the note button to store additional information about the employee. For more information about setting up employee classes, refer to Creating an employee class in the Payroll manual.

Choose the paperclip icon button to open the OLE (Object Linking and Embedding) container and store a picture of the employee. Refer to Adding an employee photo on page 65 for more information about storing an employee's photograph.

4. Enter the employee's full name and Social Security number.

The system will validate the Social Security number. If it is an invalid number, an alert message will be displayed. If you're not sure of the number, you can enter all zeros and replace it later with the employee's Social Security number.

5. Enter the date the employee started working. If you use adjusted hire dates for attendance, length of service, benefit eligibility or reviews, enter the adjusted hire date for the employee. If you don't enter an adjusted hire date, the hire date will be displayed in the Adjusted Hire Date field.

6. Enter or select the primary state to which unemployment taxes are paid and enter or select the workers' compensation code for the employee.

7. Select the employee's employment type and enter the employee's address and phone number.

8. Enter or select the primary department the employee works in, as well as the employee's primary position. If you enter a department or position that doesn't already exist, the system will prompt you to add the department or position.

9. Choose Additional Positions to open the Employee Positions window where you can enter additional positions for this employee. Refer to *Creating an employee additional position record* on page 63 for more information.

10. Choose Human Resources to open the Employee Human Resources Maintenance window where you can enter employee information such as their human resources employment status and personal information. You also can open the Employee Contacts window and the Employee Extra Fields window from this window. Refer to *Adding an employee human resources record* on page 59, *Adding an employee contact record* on page 60 and *Adding an employee extra field record* on page 77 for more information.

11. Choose Address to open the Employee Address Maintenance window where you can store additional employee addresses. Refer to *Adding an employee address record* on page 57 for more information.

12. Choose Additional Information to open the Employee Additional Information Maintenance window where you can enter employee information such as birth date and work hours per year. Refer to *Adding an employee additional information record* on page 56 for more information.

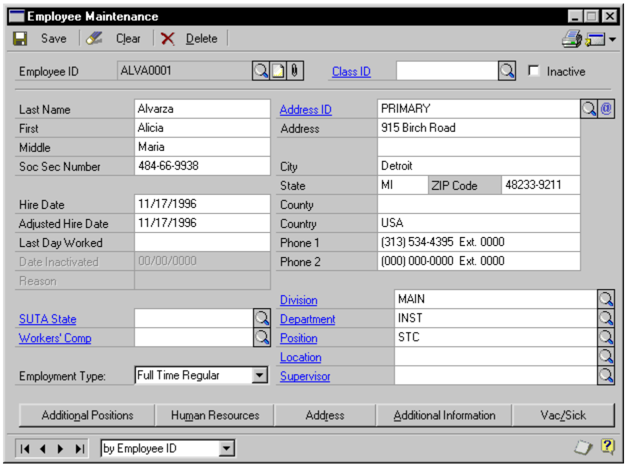
13. Choose Save in the Employee Maintenance window.

Inactivating an employee record

Use the Employee Maintenance window to inactivate an employee record. You can inactivate an employee record for a time and reactivate it at a later date.

To inactivate an employee record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)



Employee ID ALVA0001
Class ID
☐ Inactive
Last Name Alvarza
First Alicia
Middle Maria
Soc Sec Number 484-66-9938
Hire Date 11/17/1996
Adjusted Hire Date 11/17/1996
Last Day Worked
Date Inactivated 00/00/0000
Reason
SUTA State
Workers' Comp
Employment Type: Full Time Regular
Address ID PRIMARY
Address 915 Birch Road
City Detroit
State MI ZIP Code 48233-9211
County
Country USA
Phone 1 (313) 534-4395 Ext. 0000
Phone 2 (000) 000-0000 Ext. 0000
Division MAIN
Department INST
Position STC
Location
Supervisor

2. Enter or select an employee ID.

3. Mark Inactive to inactivate the employee record.

4. Enter the date the employee record was inactivated and the reason why.

Inactive employee records will continue to appear on payroll reports if they have current-year activity. When you print other reports in Human Resources, such as employee lists, you can choose whether to include inactive employee records. You can delete inactive employee records during the year-end closing process.

5. Choose Save.

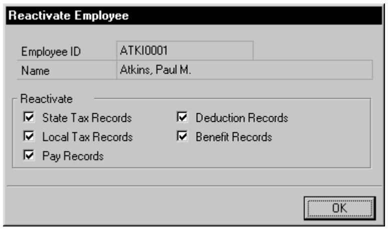
To reactivate an employee record, unmark Inactive and choose Save. The Reactivate Employee window will open, where you can reactivate the employee records. Choose OK when you've finished. For more information, refer to *Reactivating an employee record* on page 53.

Reactivating an employee record

Use the Employee Maintenance window to reactivate an employee record that has been inactivated.

To reactivate an employee record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)
2. Enter or select an employee ID.
3. Unmark Inactive to reactivate the employee record.
4. Choose Save. The Reactivate Employee window will open.



Employee ID ATKI0001
Name Atkins, Paul M.

Reactivate
☑ State Tax Records
☑ Local Tax Records
☑ Pay Records
☑ Deduction Records
☑ Benefit Records

5. Choose OK. All marked records will be reactivated.

Modifying or deleting an employee record

Use the Employee Maintenance window to modify or delete an employee record. You can modify an employee record to reflect changes such as a department or address. You also can delete an employee record if you're not planning to use it in the future.

If summary information exists for an employee, such as monthly, quarterly or yearly information, you can't delete the employee record. You can only delete the record after you've cleared financial information at the end of the year. For more information about removing history information, refer to Chapter 16, "Removing records," in the Payroll manual.

To modify or delete an employee record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID.

3. Make the changes by highlighting the fields you want to change, enter new information and choose Save.

4. To delete an employee record, choose Delete.

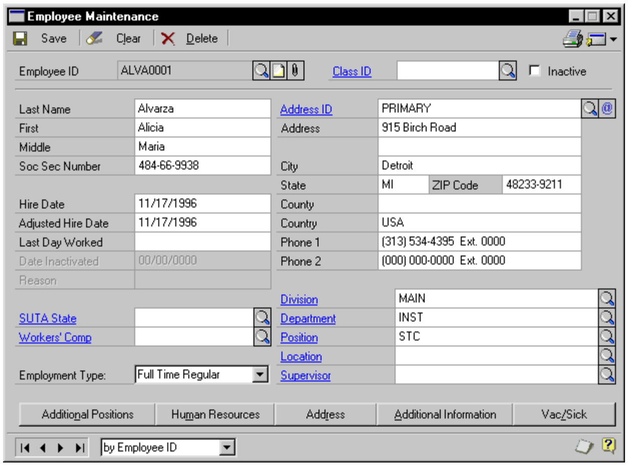
To save an employee record to access at a later date, archive the employee record rather than deleting it. For more information, refer to Archiving an employee record on page 271.

Changing an employee's position

Use the Employee Maintenance window to change an employee's position. After you save an employee's position changes to history, you can view the employee's position history in the Position History window.

To change an employee's position:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)



Employee Maintenance
Save
Clear
Delete
Additional Positions
Human Resources
Address
Additional Information
Vac/Sick
by Employee ID

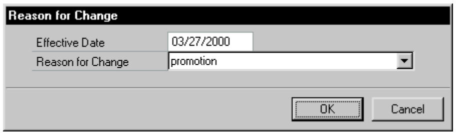
Employee ID: ALVA0001
Class ID:
☐ Inactive
Last Name: Alvarza
First: Alicia
Middle: Maria
Soc Sec Number: 484-66-9938
Hire Date: 11/17/1996
Adjusted Hire Date: 11/17/1996
Last Day Worked:
Date Inactivated: 00/00/0000
Reason:
SUTA State:
Workers' Comp:
Employment Type: Full Time Regular
Address ID: PRIMARY
Address: 915 Birch Road
City: Detroit
State: MI ZIP Code: 48233-9211
County:
Country: USA
Phone 1: (313) 534-4395 Ext. 0000
Phone 2: (000) 000-0000 Ext. 0000
Division: MAIN
Department: INST
Position: STC
Location:
Supervisor:

2. Enter or select an employee ID.

3. Enter or select a new position.

4. Choose Save.

5. You will be prompted to save the position changes to history. Choose Yes to save the position changes to history. The Reason for Change window will open.



Reason for Change
OK
Cancel

Effective Date: 03/27/2000
Reason for Change: promotion

6. Enter an effective date and enter or select a reason for change.

7. Choose OK. If the reason doesn't exist, you'll be prompted to add the reason.

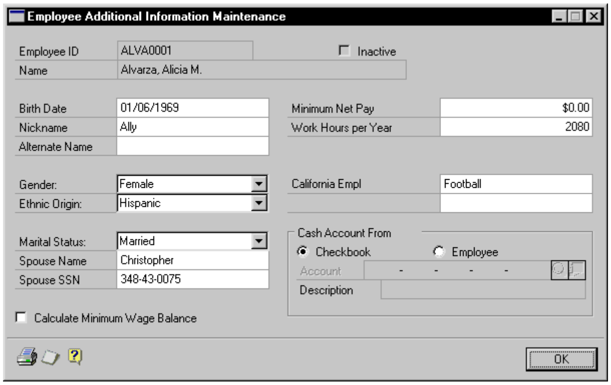
Adding an employee additional information record

Use the Employee Additional Information Maintenance window to add an employee additional information record. You can enter information such as birth date, work hours per year and posting account information.

To add an employee additional information record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID and choose Additional Information to open the Employee Additional Information Maintenance window.



Employee ID	ALVA0001	☐ Inactive	
Name	Alvarza, Alicia M.		
Birth Date	01/06/1969	Minimum Net Pay	$0.00
Nickname	Ally	Work Hours per Year	2080
Alternate Name			
Gender:	Female	California Empl	Football
Ethnic Origin:	Hispanic		
Marital Status:	Married	Cash Account From	● Checkbook ○ Employee
Spouse Name	Christopher	Account	- - - -
Spouse SSN	348-43-0075	Description	

☐ Calculate Minimum Wage Balance

3. Enter the employee’s birth date, nickname and alternate name, if applicable, and select Male or Female for the employee’s gender.

4. Select the employee’s ethnic origin. This information is used for Equal Employment Opportunity Commission reporting.

5. Select the employee’s marital status and enter the employee’s spouse’s name and Social Security number, if applicable.

6. Mark Calculate Minimum Wage Balance if this employee must be paid at least the minimum wage.

7. Enter an amount if there is a minimum amount that the employee must receive in each paycheck. Then enter the number of hours the employee will work in a year.

This information will be used to calculate accrued vacation and sick time amounts, if you accrue vacation and sick time by hours worked. It also will be used to calculate the hourly rate on salary pay records when you enter adjustments for salary pay.

If you entered information for the user-defined fields in the Payroll Setup window, these fields will be displayed in the Employee Additional Information Maintenance window.

If you're using Payroll, see the Payroll documentation for information about the cash account from field.

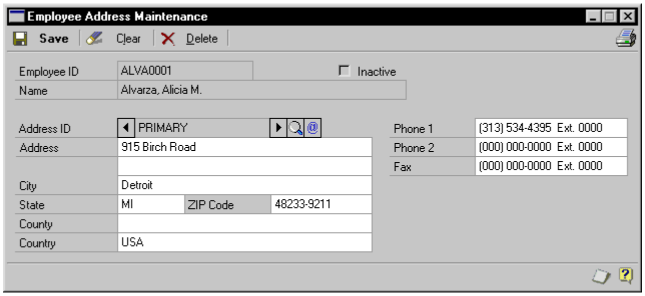
Adding an employee address record

Use the Employee Address Maintenance window to add an employee address record. You can enter address and phone information.

To add an employee address record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID and choose Address to open the Employee Address Maintenance window.



Employee ID ALVA0001
☐ Inactive
Name Alvarza, Alicia M.
Address ID PRIMARY
Address 915 Birch Road
City Detroit
State MI
ZIP Code 48233-9211
County
Country USA
Phone 1 (313) 534-4395 Ext. 0000
Phone 2 (000) 000-0000 Ext. 0000
Fax (000) 000-0000 Ext. 0000

3. Enter an identification to describe the address and the address information, including city, state and postal code.

4. Enter the county and country information and the phone and fax numbers.

5. Choose Save.

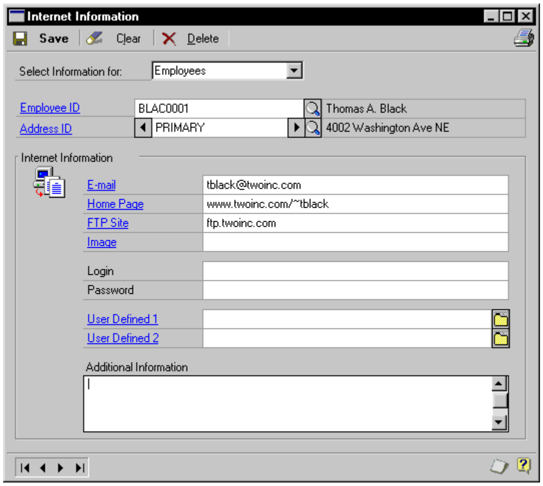
Setting up employee Internet information

Use the Internet Information window to track Internet-related information about an employee, such as e-mail addresses, web page URLs, and FTP sites.

To set up employee Internet information:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee)

2. Enter or select an employee ID and choose the Address ID Internet button to open the Internet Information window.


Internet Information
Save
Clear
Delete
Internet Information
Image
Login
Password
User Defined 1
User Defined 2
Additional Information

Select Information for: Employees

Employee ID: BLAC0001 Thomas A. Black

Address ID: PRIMARY 4002 Washington Ave NE

E-mail: tblack@twoinc.com

Home Page: www.twoinc.com/~tblack

FTP Site: ftp.twoinc.com

3. Select Employees in the Select Information for field.

4. Enter Internet information.

5. Choose Save to save your entries.

6. To print Internet information for the current employee, choose File >> Print. The Internet Information Report is printed, showing Internet information for the current employee. To print an Internet Information Report showing Internet information for all employees, use the Company General Report Options window. Refer to Help >> Index >> Company General Report Options window for more information.

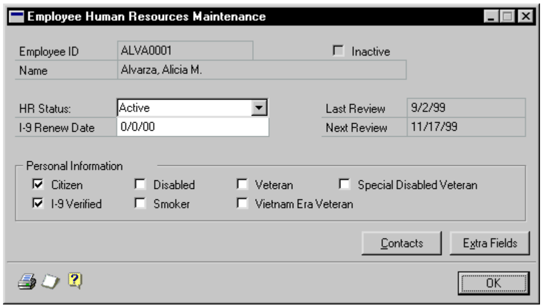
Adding an employee human resources record

Use the Employee Human Resources Maintenance window to enter human resources information. This information can be used for reporting and benefit purposes. You can also open the Employee Contacts window and Employee Extra Fields window from the Employee Human Resources Maintenance window.

To add an employee human resources record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID and choose Human Resources to open the Employee Human Resources Maintenance window.



Employee Human Resources Maintenance

Employee ID ALVA0001
☐ Inactive
Name Alvarza, Alicia M.

HR Status: Active
I-9 Renew Date 0/0/00
Last Review 9/2/99
Next Review 11/17/99

Personal Information
☑ Citizen
☑ I-9 Verified
☐ Disabled
☐ Smoker
☐ Veteran
☐ Vietnam Era Veteran
☐ Special Disabled Veteran

3. Select an HR status, enter an I-9 Renew Date, if necessary, and mark the personal information options that apply to this employee. For more information about I-9, refer to *Adding an employee I-9 record* on page 67.

4. Choose Extra Fields to open the Employee Extra Fields window where you can enter extra employee information. For more information about I-9, refer to *Adding an employee extra field record* on page 77.

5. Choose Contacts to open the Employee Contacts window where you can enter employee contact information. For more information about I-9, refer to *Adding an employee contact record* on page 60.

6. Choose OK in the Employee Human Resources window to display the Employee Maintenance window.

7. Choose Save.

Modifying an employee human resources record

Use the Employee Human Resources Maintenance window to enter human resources information. You can modify an employee human resources record to reflect changes such as the HR status or I-9 renew date.

To modify an employee human resources record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)
2. Enter or select an employee ID.
3. Choose Human Resources to open the Employee Human Resources Maintenance window.
4. Make your changes and choose OK to display the Employee Maintenance window.
5. Choose Save.

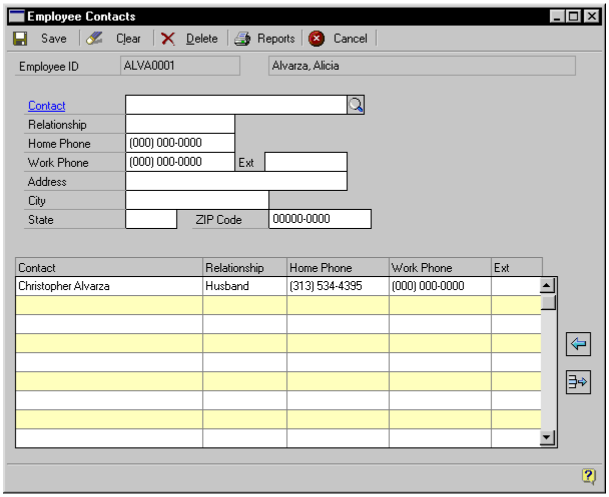
Adding an employee contact record

Use the Employee Contacts window to create employee contact records. You can use this information in case of an emergency.

To add an employee contact record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)
2. Enter or select an employee ID.
3. Choose Human Resources to open the Employee Human Resources Maintenance window.

4. Choose Contacts to open the Employee Contacts window.



Employee ID ALVA0001 Alvarza, Alicia

Contact
Relationship
Home Phone (000) 000-0000
Work Phone (000) 000-0000 Ext
Address
City
State ZIP Code 00000-0000

Contact	Relationship	Home Phone	Work Phone	Ext
Christopher Alvarza	Husband	(313) 534-4395	(000) 000-0000	

5. Enter a contact name, relationship to the employee, phone numbers and address information.

6. Choose Save or the insert icon button to add the record to the scrolling window.

7. Repeat Steps 5 and 6 until you've added all of the contact information this employee has provided for you.

8. Close the window.

Modifying or deleting an employee contact record

Use the Employee Contacts window to modify or delete employee contact records. You can modify the employee contact record to reflect changes such as address and phone information. You also can delete a contact record the employee doesn't want to use anymore.

To modify or delete an employee contact record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID.

3. Choose Human Resources to open the Employee Human Resources Maintenance window.

4. Choose Contacts to open the Employee Contacts window.

5. Select the contact record and choose the select icon button.

6. Make your changes as provided by the employee and choose Save or the insert icon button to add the record to the scrolling window.

7. To delete an employee contact record, choose Delete.

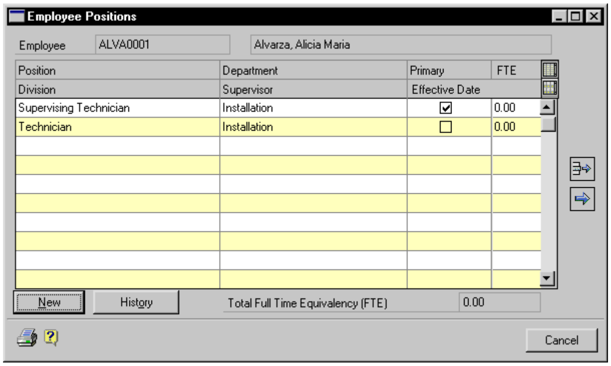
Viewing or deleting an employee's positions

Use the Employee Positions window to view or delete an employee's positions. You can view position, department, division and supervisor information. You also can view the effective date of the position and the full time equivalency for the position. You can delete an employee's position only if it is not the employee's primary position.

To view or delete an employee's positions:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID and choose Additional Positions to open the Employee Positions window.



Employee ALVA0001 Alvarza, Alicia Maria

Position Division	Department Supervisor	Primary Effective Date	FTE
Supervising Technician	Installation	☑	0.00
Technician	Installation	☐	0.00

Total Full Time Equivalency (FTE) 0.00

3. To delete an employee's position, highlight the position and choose the remove icon button.

4. When you've finished, close the window.

Creating an employee additional position record

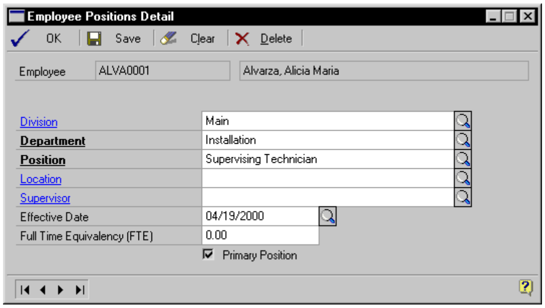
Use the Employee Positions Detail window to create an employee additional position record. You can enter a full-time equivalency (FTE) to each position and indicate which position is the employee's primary position. A full-time position equals 1.00.

To create an employee additional position record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID and choose Additional Positions to open the Employee Positions window.

3. Choose New to open the Employee Positions Detail window.



Employee ALVA0001 Alvarza, Alicia Maria

Division Main
Department Installation
Position Supervising Technician
Location
Supervisor
Effective Date 04/19/2000
Full Time Equivalency (FTE) 0.00
☑ Primary Position

4. Enter or select a division, department, position, location and supervisor for the employee.

5. Enter or select the effective date for the position and enter a full-time equivalency number.

6. If this position is the employee’s primary position, mark Primary Position.

7. Choose Save.

Viewing or deleting an employee position history record

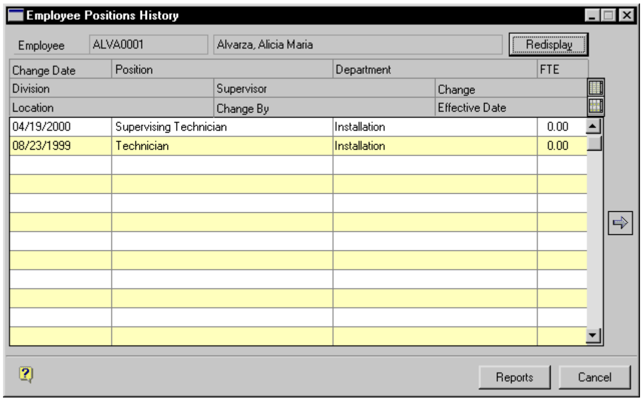
Use the Employee Positions History window to view or delete an employee position history record. You can view employee position information such as the position change date, effective date and full time equivalency. You also can remove a record.

To view or delete an employee position history record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID and choose Additional Positions to open the Employee Positions window.

3. Choose History to open the Employee Positions History window.


Employee Positions History
Redisplay
Division
Supervisor
Change
Location
Change By
Effective Date
Reports
Cancel

Employee ALVA0001 Alvarza, Alicia Maria

Change Date	Position	Department	FTE
04/19/2000	Supervising Technician	Installation	0.00
08/23/1999	Technician	Installation	0.00

4. To delete a position history record, highlight the record and choose the remove icon button.

5. When you've finished, close the window.

Adding an employee photo

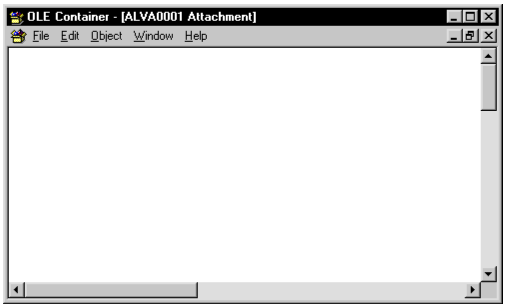
Use the paperclip icon button to open the OLE (Object Linking and Embedding) container attached to the Employee Maintenance window and store a file containing an employee photo. For more information about the OLE container, refer to the System User's guide.

To add an employee photo:

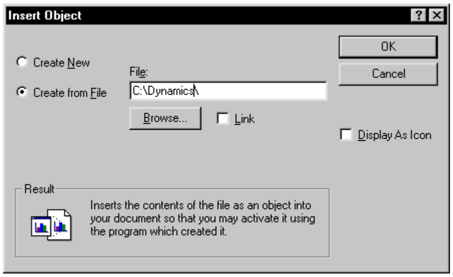
1. Open the Employee Maintenance window.
(Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID.

3. Choose the paperclip icon button on the Employee ID field to open the OLE container.


OLE Container - [ALVA0001 Attachment]
File
Edit
Object
Window
Help

4. Choose Edit >> Insert New Object to open the Insert Object window.


Insert Object
OK
Cancel
Browse...
Result

○ Create New
● Create from File
File: C:\Dynamics\
☐ Link
☐ Display As Icon

Inserts the contents of the file as an object into your document so that you may activate it using the program which created it.

5. Mark Create from File and select Browse to find the file containing the employee picture.

   If you mark Link, a link to the file will be inserted. Otherwise, the contents of the file will be inserted as an object.

6. Choose OK to return to the OLE container.

7. Choose File >> Save and close the OLE container.

Chapter 7: I-9 Form

The I-9 form is the U.S. Immigration and Naturalization Service Employment Eligibility Verification form. This form is required of all employers and must be kept on file for all employees. Its purpose is to verify that an employee is eligible for employment in the United States.

Using the I-9 form, you can track working credentials or proper citizenship information from employees. You can also create I-9 reports, as required by federal law.

This information is divided into the following sections:

- *Printing the I-9 form and instructions*
- *Adding an employee I-9 record*
- *Modifying an employee I-9 record*

Printing the I-9 form and instructions

Pages 1 and 2 of the I-9 form and the instructions are included in the I9.PDF file. You can print the blank I-9 form and keep it on file after your employees have entered their information.

To print the I-9 form and instructions:

1. Choose Shortcuts to open the Shortcut Bar.

2. Choose Add >> External Shortcut to open the Add External Shortcut window.

3. Enter a name for the shortcut and browse to find the I9.PDF.

4. Choose Add and then Done.

5. Choose the shortcut to print pages 1 and 2 of the I-9 form and the instructions.

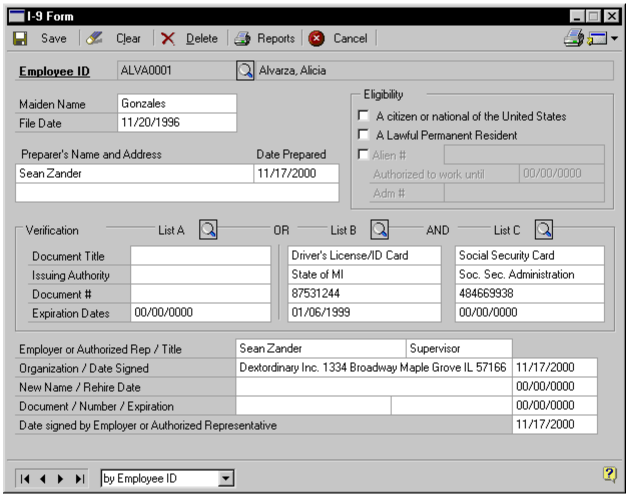
Adding an employee I-9 record

Use the I-9 Form window to add I-9 information. An I-9 form must be completed and kept on file for each employee. For I-9 verification, you must choose one item from List A or one item from both List B and List C.

List A includes documents that establishes both identify and employment eligibility, such as a U.S. Passport, certificate of U.S. Citizenship and unexpired foreign passports. List B includes documents such as a U..S driver's license or ID card, school ID card and voter registration card. List C's acceptable documents include a U.S. Social Security card, Certification of Birth Abroad document and Native American tribal documents.

To add an employee I-9 record:

1. Open the I-9 Form window.
   (Cards >> Human Resources >> Employee >> I-9)



Employee ID: ALVA0001 Alvarza, Alicia

Maiden Name: Gonzales

File Date: 11/20/1996

Preparer's Name and Address: Sean Zander

Date Prepared: 11/17/2000

Eligibility

☐ A citizen or national of the United States

☐ A Lawful Permanent Resident

☐ Alien #

Authorized to work until: 00/00/0000

Adm #

Verification	List A	List B	List C
Document Title		Driver's License/ID Card	Social Security Card
Issuing Authority		State of MI	Soc. Sec. Administration
Document #		87531244	484669938
Expiration Dates	00/00/0000	01/06/1999	00/00/0000

Employer or Authorized Rep / Title	Sean Zander	Supervisor	
Organization / Date Signed	Dextordinary Inc. 1334 Broadway Maple Grove IL 57166		11/17/2000
New Name / Rehire Date			00/00/0000
Document / Number / Expiration			00/00/0000
Date signed by Employer or Authorized Representative			11/17/2000

by Employee ID

2. Enter or select an employee ID.

3. Enter a maiden name, if appropriate and the file date.

4. Enter the name and address of the preparer, including the date prepared, if applicable. The preparer can be either the person preparing the paper form or the person entering the information in the window.

5. Mark the employee's employment eligibility.

6. Enter the employee's eligibility verification (proof) information.

7. Choose the lookup button for the list(s) you've selected to open an Acceptable Documents window. Information in the documents window will vary depending on the list you marked.

   Select one item from list A, or one item from list B and one item from list C.

8. Enter the issuing authority for the document(s), the document number, if applicable and the document expiration date.

9. Enter the employer or authorized representative name and title, the organization and date signed.

10. If applicable, enter the employee's new name or rehire date.

11. Enter the document name, document number and expiration date.

   ⚠ *You must enter a date in the Document Expiration field. This date will be used to set the I-9 renewal date.*

12. Enter the date signed by the employer or authorized representative and choose Save.

13. Choose File >> Print to print the I-9 Form.

Modifying an employee I-9 record

Use the I-9 Form window to modify I-9 information. You can change information such as expiration dates.

To modify an employee I-9 record:

1. Open the I-9 Form window.
   (Cards >> Human Resources >> Employee >> I-9)

2. Enter or select an employee ID.

3. Change the necessary information.

4. Choose Save.

Chapter 8: Dependent Records

To use the benefits feature, you must enter information about each employee’s dependents. This helps ensure that the benefits your company offers are administered properly.

This information is divided into the following sections:

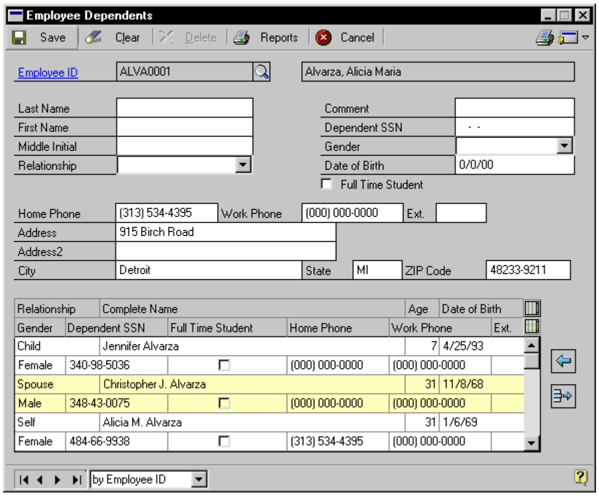
- *Adding an employee dependent record*
- *Modifying or deleting an employee dependent record*

Adding an employee dependent record

Use the Employee Dependents window to enter information about an employee’s dependents.

To add an employee dependent record:

1. Open the Employee Dependents window. (Cards >> Human Resources >> Employee >> Dependents)



Employee ID: ALVA0001 — Alvarza, Alicia Maria

Last Name:
First Name:
Middle Initial:
Relationship:
Comment:
Dependent SSN: - -
Gender:
Date of Birth: 0/0/00
☐ Full Time Student

Home Phone: (313) 534-4395 Work Phone: (000) 000-0000 Ext.:
Address: 915 Birch Road
Address2:
City: Detroit State: MI ZIP Code: 48233-9211

Relationship	Complete Name			Age	Date of Birth
Gender	Dependent SSN	Full Time Student	Home Phone	Work Phone	Ext.
Child	Jennifer Alvarza			7	4/25/93
Female	340-98-5036	☐	(000) 000-0000	(000) 000-0000	
Spouse	Christopher J. Alvarza			31	11/8/68
Male	348-43-0075	☐	(000) 000-0000	(000) 000-0000	
Self	Alicia M. Alvarza			31	1/6/69
Female	484-66-9938	☐	(313) 534-4395	(000) 000-0000	

by Employee ID

2. Enter or select an employee ID. Information about the employee will be displayed in the scrolling window.

3. Enter the first and last name of the employee’s dependent.

4. Select the relationship of the dependent to the employee and enter any comments.

The comments field for the "self" dependent will display the phrase "Used for benefits."

5. Enter the dependent's Social Security number, gender and date of birth.
6. Mark Full Time Student if the dependent is a full-time student.
7. Enter the dependent's phone numbers and address.
8. Choose Save or the insert icon button.
9. Repeat Steps 3 through 8 until you've defined each of this employee's dependents.

Modifying or deleting an employee dependent record

Use the Employee Dependents window to modify or delete an employee dependent record.

To modify or delete an employee dependent record:

1. Open the Employee Dependents window.
   (Cards >> Human Resources >> Employee >> Dependents)
2. Enter or select an employee ID.
3. Select the dependent record and choose the select icon button.
4. Make your changes as needed and choose Save or the insert icon button.
5. To delete an employee dependent record, choose Delete.

Chapter 9: Property Records

You can track the property your company has—and who has possession of property items. For instance, you can define the property items your organization lends to employees, and track which employees have those items. You also can assign due dates for the return of the loaned items.

To track an item on loan to an employee, you'll use the Property window. For more information, refer to *Creating a property item record* and *Creating multiple property item records* in Chapter 13, "Property," of the Human Resources Setup manual.

This information is divided into the following sections:

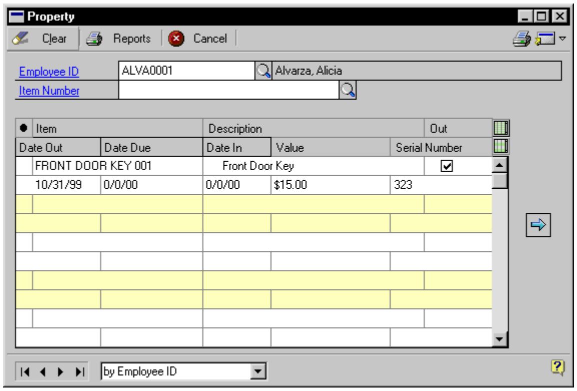
- *Assigning a property item to an employee*
- *Returning a property item to inventory*

Assigning a property item to an employee

Use the Property window to assign a property item to an employee. You can't assign a property item to an employee that is already assigned to another employee.

To assign a property item to an employee:

1. Open the Property window.
   (Cards >> Human Resources >> Employee >> Property)



Employee ID ALVA0001 Alvarza, Alicia
Item Number

● Item		Description		Out
Date Out	Date Due	Date In	Value	Serial Number
FRONT DOOR KEY 001		Front Door Key		☑
10/31/99	0/0/00	0/0/00	$15.00	323

by Employee ID

2. Enter or select an employee ID.

3. Enter or select the property item. The item automatically will be added to that employee’s property record with the current date.

4. To enter a due date for this item, expand the scrolling window with the hide and show buttons and enter the information.

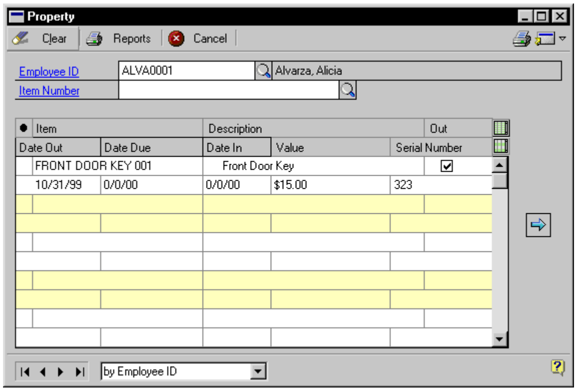
5. Close the window.

Returning a property item to inventory

Use the Property window to indicate that a property item has been returned by an employee.

To return a property item to inventory:

1. Open the Property window.
   (Cards >> Human Resources >> Employee >> Property)



Employee ID: ALVA0001 Alvarza, Alicia
Item Number:

Item	Description	Out
FRONT DOOR KEY 001	Front Door Key	☑

Date Out	Date Due	Date In	Value	Serial Number
10/31/99	0/0/00	0/0/00	$15.00	323

by Employee ID

2. Enter or select an employee ID.

3. Enter or select the property item.

4. To enter the date an item returned, expand the scrolling window with the hide and show buttons and enter the information.

Chapter 10: Union Records

A union is a labor organization that represents the interests of employees, usually in a particular industry. Many businesses and industries employ union members. With Human Resources, you can track basic information about employees' union membership.

This information is divided into the following sections:

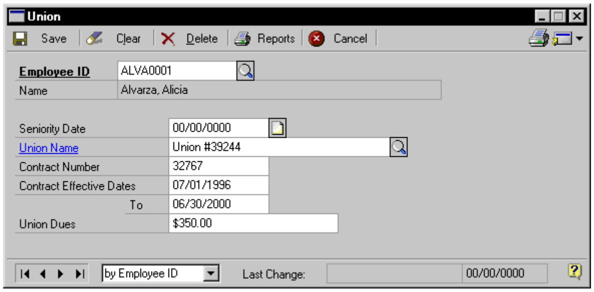
- *Adding an employee union record*
- *Modifying or deleting an employee union record*

Adding an employee union record

Use the Union window to create an employee union record. You can track information like the union senority date and the union contract number.

To add an employee union record:

1. Open the Union window.
   (Cards >> Human Resources >> Employee >> Union)



Employee ID: ALVA0001
Name: Alvarza, Alicia
Seniority Date: 00/00/0000
Union Name: Union #39244
Contract Number: 32767
Contract Effective Dates: 07/01/1996
To: 06/30/2000
Union Dues: $350.00
Last Change: 00/00/0000

2. Enter or select an employee ID.

3. Enter the seniority date with the union and enter or select a union.

4. Enter a contract number, contract effective dates and union dues.

5. Choose Save.

Modifying or deleting an employee union record

Use the Union window to modify or delete an employee union record. You can modify an employee union record to reflect changes such as the contract date or union dues. You can delete an employee union record if the employee no longer belongs to the union.

To modify or delete an employee union record:

1. Open the Union window.
   (Cards >> Human Resources >> Employee >> Union)

2. Enter or select an employee ID.

3. Make your changes and choose Save.

4. To delete an employee union record, choose Delete.

Chapter 11: Employee Extra Fields and User-Defined Fields

For tracking employee information that doesn't "fit" into predefined windows, use the Employee Extra Fields and Employee User Defined windows. For more information, refer to *Setting up applicant or employee extra fields* and *Defining the applicant user-defined window* in Chapter 11, "Extra Fields and User Defined Fields Setup," of the Human Resources Installation and Setup manual.

- The Employee Extra Fields window allows you to track information in 25 additional fields:
  - Five for storing dates
  - Five for storing numbers
  - Five for storing yes/no information
  - Five for storing currency figures
  - Five for storing words or phrases
- The Employee User Defined window allows you track employee information in 36 additional fields:
  - Five "string" fields, for storing characters and numbers
  - Five currency fields, for storing currency amounts
  - Five date fields, for storing dates
  - Five integer fields, for storing whole numbers
  - Ten check box fields, for storing yes/no information
  - Five time fields, for storing time information
  - A notes area, for storing longer text entries

This information is divided into the following sections:

- *Adding an employee extra field record*
- *Modifying or deleting an employee extra field record*
- *Adding an employee user-defined record*
- *Modifying or deleting an employee user-defined record*
- *Printing an employee user-defined report*

Adding an employee extra field record

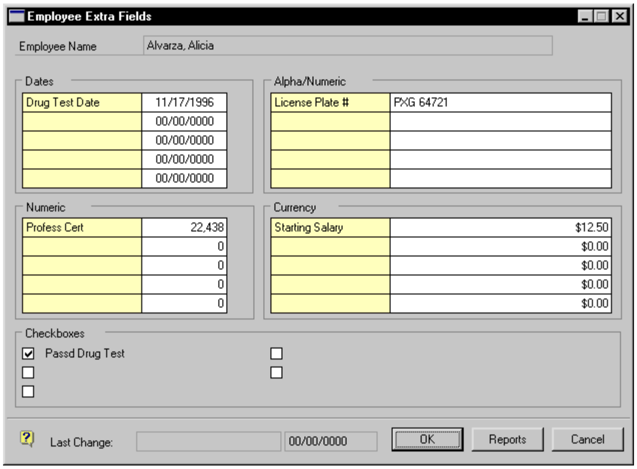
Use the Employee Extra Fields window to create an employee extra field record. You can track any additional information, like an employee's driver's license. For more information, refer to *Setting up applicant or employee extra fields* in Chapter 11, "Extra Fields and User Defined Fields Setup," of the Human Resources Installation and Setup manual.

To add an employee extra field record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)

2. Enter or select an employee ID.

3. Choose Human Resources >> Extra Fields to open the Employee Extra Fields window.



Employee Name: Alvarza, Alicia

Dates

Drug Test Date	11/17/1996
	00/00/0000
	00/00/0000
	00/00/0000
	00/00/0000

Alpha/Numeric

License Plate #	PXG 64721

Numeric

Profess Cert	22,438
	0
	0
	0
	0

Currency

Starting Salary	$12.50
	$0.00
	$0.00
	$0.00
	$0.00

Checkboxes

☑ Passd Drug Test
☐
☐
☐
☐

Last Change: 00/00/0000

4. Enter information in the fields.

5. Choose Save.

Modifying or deleting an employee extra field record

Use the Employee Extra Fields window to modify or delete an employee extra field record.

To modify or delete an employee extra field record:

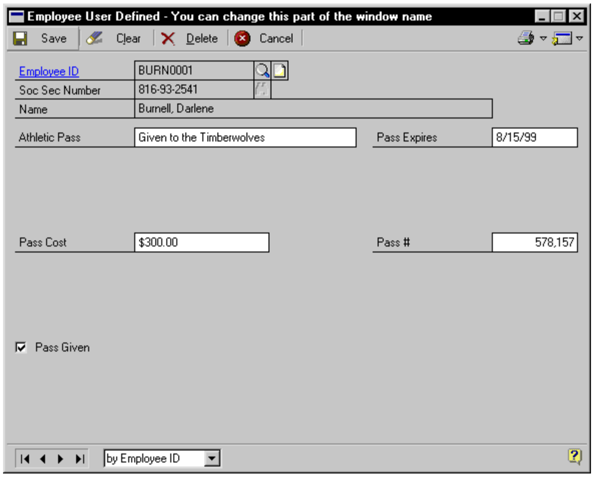
1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)
2. Select an employee ID.
3. Choose Human Resources >> Extra Fields to open the Employee Extra Fields window.
4. Make your changes and choose Save.
5. To delete an employee extra field record, choose Delete.

Adding an employee user-defined record

Use the Employee User Defined window to create an employee user-defined record. You can track any additional information, like security checks or drug testing results. The window name created in the Employee User Defined Setup window is the name that will be displayed. For more information, refer to *Defining the employee user-defined window* in Chapter 11, "Extra Fields and User Defined Fields Setup," of the Human Resources Installation and Setup manual.

To add an employee user-defined record:

1. Open the Employee User Defined window.
   (Cards >> Human Resources >> Employee >> User Defined)


Employee User Defined - You can change this part of the window name
Save
Clear
Delete
Cancel
by Employee ID

Employee ID: BURN0001
Soc Sec Number: 816-93-2541
Name: Burnell, Darlene
Athletic Pass: Given to the Timberwolves
Pass Expires: 8/15/99
Pass Cost: $300.00
Pass #: 578,157
☑ Pass Given

2. Select an employee ID. If you didn’t mark Multi Record in the Employee User Defined Setup window, proceed with Step 3.

   If you marked Multi Record in the Employee User Defined Setup window, the window will open with the Record Number field set at 1.

   - To enter information for Record 1, proceed with step 3.
   - To create another record, use the browse buttons on the Record Number field until you reach the record number you need to create.

3. Enter information in the fields and choose Save.

Modifying or deleting an employee user-defined record

Use the Employee User Defined window to modify or delete an employee user-defined record.

To modify or delete an employee user-defined record:

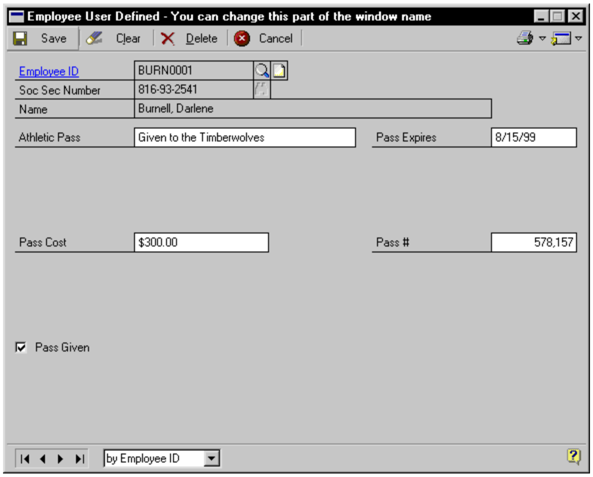
1. Open the Employee User Defined window.
   (Cards >> Human Resources >> Employee >> User Defined)
2. Select an employee ID.
3. If you marked Multi Record in the Employee User Defined Setup window, use the browse buttons on the Record Number field to select the record you want to change.
4. Make your changes and choose Save.
5. To delete an employee user-defined record, choose Delete.

Printing an employee user-defined report

Use the Employee User Defined window to print reports for your user-defined information.

To print an employee user-defined report:

1. Open the Employee User Defined window.
   (Cards >> Human Resources >> Employee >> User Defined)



Employee User Defined - You can change this part of the window name

Employee ID: BURN0001
Soc Sec Number: 816-93-2541
Name: Burnell, Darlene
Athletic Pass: Given to the Timberwolves
Pass Expires: 8/15/99
Pass Cost: $300.00
Pass #: 578,157
☑ Pass Given
by Employee ID

2. Choose the print icon button. The report will be printed or the Report Destination window will open, depending on your report destination user preferences.

Chapter 12: Employee Pay Code Maintenance

If you're using Human Resources with Integration to Payroll, use the Employee Pay Code HR Maintenance window to view the position, compa-ratio and annual pay information for an employee. If you're using Human Resources, but not Payroll, use the Employee Pay Code Maintenance window to view Human Resources information. To set up a pay code, refer to *Setting up a pay code* in Chapter 5, "Organizational Structure," of the Human Resources Installation and Setup manual for more information.

The Compa-Ratio field will display the employee's pay rate divided by the middle value of the salary matrix linked to the employee's position. The Annual Pay field will display the employee's annual pay for hourly and salary pay types.

This information is divided into the following sections:

- *Viewing employee Human Resources pay code information*
- *Adding an employee pay record*

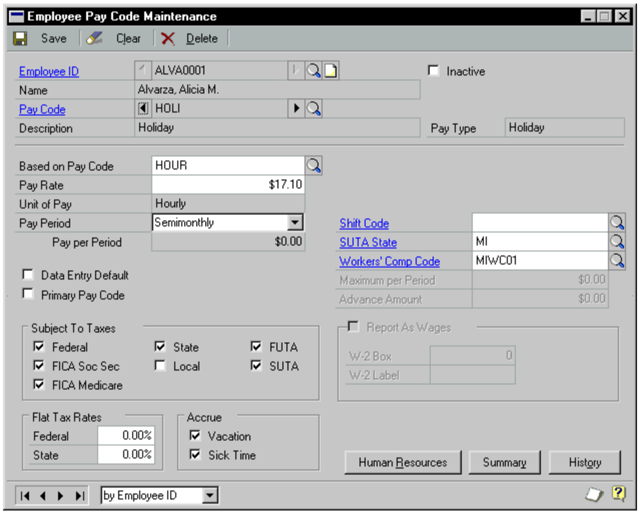
Viewing employee Human Resources pay code information

Use this procedure only if you're using Human Resources with Integration to Payroll.

Use the Employee Pay Code HR Maintenance window to view position, compa-ratio and annual pay information for an employee.

To view employee Human Resources pay code information:

1. Open the Employee Pay Code Maintenance window.
   (Cards >> Human Resources >> Employee >> Pay Code)


Employee Pay Code Maintenance
Save
Clear
Delete
Human Resources
Summary
History

Employee ID: ALVA0001
Inactive: ☐
Name: Alvarza, Alicia M.
Pay Code: HOLI
Description: Holiday
Pay Type: Holiday
Based on Pay Code: HOUR
Pay Rate: $17.10
Unit of Pay: Hourly
Pay Period: Semimonthly
Pay per Period: $0.00
Shift Code:
SUTA State: MI
Workers' Comp Code: MIWC01
Maximum per Period: $0.00
Advance Amount: $0.00
☐ Data Entry Default
☐ Primary Pay Code

Subject To Taxes
☑ Federal
☑ FICA Soc Sec
☑ FICA Medicare
☑ State
☐ Local
☑ FUTA
☑ SUTA

☐ Report As Wages
W-2 Box: 0
W-2 Label:

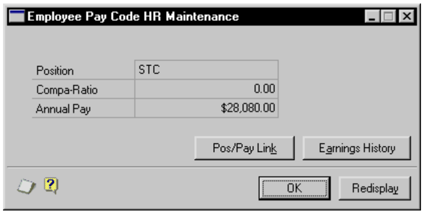
Flat Tax Rates
Federal: 0.00%
State: 0.00%

Accrue
☑ Vacation
☑ Sick Time

by Employee ID

2. Enter or select an employee ID and a pay code.

3. Choose Human Resources to open the Employee Pay Code HR Maintenance window.


Employee Pay Code HR Maintenance
Pos/Pay Link
Earnings History
OK
Redisplay

Position: STC
Compa-Ratio: 0.00
Annual Pay: $28,080.00

The Compa-Ratio field will display the employee's pay rate divided by the middle value of the salary matrix linked to the employee's position. The Annual Pay field will display the employee's annual pay for hourly and salary pay types.

4. In the Employee Pay Code HR Maintenance window, choose Pos/Pay Link to open the Position \ Pay Code Setup window. For more information, refer to *Linking pay codes to a position code* in Chapter 5, “Organizational Structure,” of the Human Resources Installation and Setup manual.

5. In the Employee Pay Code HR Maintenance window, choose Earnings History to open the Earnings History window. For more information, refer to *Viewing or changing or deleting an employee earnings history record* on page 219.

6. Close the Employee Pay Code HR Maintenance window and the Employee Pay Code Maintenance window.

Adding an employee pay record

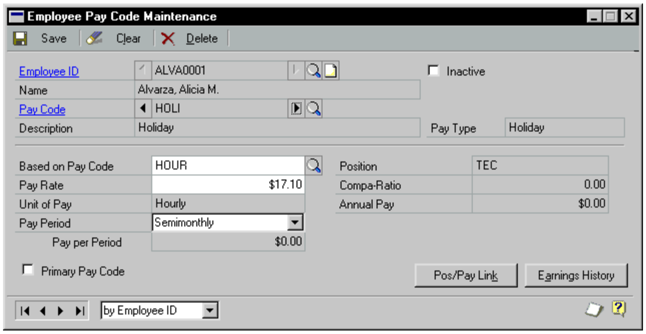
Use this procedure only if you’re not using Payroll. If you’re using Payroll, refer to Chapter 6, “Employee Cards,” in the Payroll manual.

Use the Employee Pay Codes Maintenance window to enter and maintain employee pay records. You can enter identifying pay codes and descriptions to describe each type of pay. You also can assign pay types to pay codes. For example, you might assign an hourly pay type to the pay code, HOUR.

For overtime, vacation, sick time and holiday pay types you need to enter another pay code to base these pay types upon. For example, if you’re setting up an overtime pay card for an employee with an hourly pay type, you need to base the overtime pay type upon the employee’s hourly pay.

To add an employee pay record:

1. Open the Employee Pay Code Maintenance window.
(Cards >> Human Resources >> Employee >> Pay Code)



Employee ID: ALVA0001
☐ Inactive
Name: Alvarza, Alicia M.
Pay Code: HOLI
Description: Holiday
Pay Type: Holiday
Based on Pay Code: HOUR
Pay Rate: $17.10
Unit of Pay: Hourly
Pay Period: Semimonthly
Pay per Period: $0.00
Position: TEC
Compa-Ratio: 0.00
Annual Pay: $0.00
☐ Primary Pay Code

2. Enter or select an employee ID and a pay code.

3. Enter the pay rate for the amount of pay. If Earned Income Credit is the pay type, leave the Pay Rate field blank to use the EIC tables supplied with Payroll to calculate the EIC payment. If you don't use the EIC tables, enter an amount.

   If the pay type is Piecework, enter the name of the unit of work. This unit name will be printed on Payroll reports.

   If the pay type is Salary or is based on a Salary pay type, select the unit of pay from the list of pay periods.

4. Select the pay period. After you select a pay period, the pay per period will be displayed. For example, if the pay type is Salary with a rate of $1,000 per month and it is paid semimonthly, the amount per pay period is $500.

5. Mark Primary Pay Code if this pay code is the employee's primary pay code. For example, an employee might have an hourly pay code and a vacation pay code. The hourly pay code would be the primary pay code. An employee only can have one primary pay code.

6. Enter or select a shift code for the pay code, if necessary. The Compa-Ratio field will display the employee’s pay rate divided by the middle value of the salary matrix linked to the employee’s position. The Annual Pay field will display the employee’s annual pay for hourly and salary pay types.

7. Choose Pos/Pay Link to open the Position \ Pay Code Setup window. For more information, refer to *Linking pay codes to a position code* in Chapter 5, “Organizational Structure,” of the Human Resources Installation and Setup manual.

8. Choose Earnings History to open the Earnings History window. For more information, refer to *Viewing or changing or deleting an employee earnings history record* on page 219.

9. Close the window when you’ve finished.

PART 3: EMPLOYEE ATTENDANCE

Part 3: Employee Attendance

This part of the documentation describes how to enter employee attendance information, including creating attendance transactions and tracking employees' planned absences.

The following information is discussed:

Chapter 13, "Employee Maintenance and Summary," explains how to assign different time codes to track your employees' time.

Chapter 14, "Attendance Transactions," describes how to use time codes to enter transactions that show how employees actually used their time.

Chapter 15, "Vacation Planning," explains how to help you track your employees' planned absences.

Chapter 16, "Attendance Transaction Transfer and Log," describes how to transfer attendance transactions to Payroll and view the transactions transferred.

Chapter 13: Employee Maintenance and Summary

After creating accrual schedules, you can apply them to each employee's maintenance record using the Attendance Employee Maintenance window. You also can use this window as an inquiry window to view an employee's time code balances. For more information about creating accrual schedules, refer to *Setting up an accrual schedule* in Chapter 6, "Attendance Setup," of the Human Resources Installation and Setup manual.

Use the Attendance Employee Summary window to display an employee's attendance information to date.

This information is divided into the following sections:

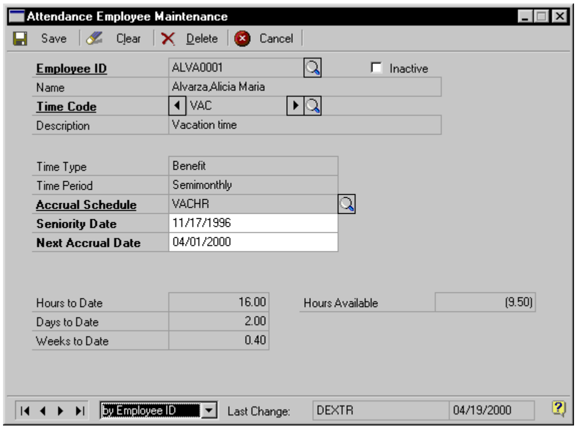
- *Adding an attendance employee maintenance record*
- *Inactivating an attendance employee maintenance record*
- *Deleting an attendance employee maintenance record*
- *Viewing employee time code balances*

Adding an attendance employee maintenance record

Use the Attendance Employee Maintenance window to create an attendance employee maintenance record and link attendance time codes to each employee record. It also displays summary information for time used and time earned.

To add an attendance employee maintenance record:

1. Open the Attendance Employee Maintenance window.
   (Cards >> Human Resources >> Employee-Attendance >> Employee Maintenance)



Employee ID: ALVA0001 ☐ Inactive
Name: Alvarza,Alicia Maria
Time Code: VAC
Description: Vacation time
Time Type: Benefit
Time Period: Semimonthly
Accrual Schedule: VACHR
Seniority Date: 11/17/1996
Next Accrual Date: 04/01/2000
Hours to Date: 16.00
Days to Date: 2.00
Weeks to Date: 0.40
Hours Available: (9.50)
by Employee ID
Last Change: DEXTR 04/19/2000

2. Enter or select an employee ID.

3. Enter or select a time code. If the time type for the time code is a benefit, such as vacation time, continue with step 4. Otherwise, proceed with step 7.

4. Choose the appropriate accrual schedule or accept the default schedule. For more information, refer to *Setting up a time code* in Chapter 13, "Employee Maintenance and Summary," of the Human Resources Installation and Setup manual.

5. Enter the seniority date or accept the default date, which is the employee's hire date or adjusted hire date, depending on your company's Human Resources Preferences. For more information, refer to *Setting up Human Resources preferences* in Chapter 3, "Human Resources Preferences," of the Human Resources Installation and Setup manual.

6. Verify the next accrual date is the next date the employee will earn benefit time.

7. Choose Save.

Inactivating an attendance employee maintenance record

Use the Attendance Employee Maintenance window to inactivate an attendance employee maintenance record. You can inactivate an attendance employee maintenance record if you change an employee’s time code. For instance, if the employee was paid an hourly wage and now receives an annual salary, you would inactivate the hourly record.

To inactivate an employee attendance maintenance record:

1. Open the Attendance Employee Maintenance window.
   (Cards >> Human Resources >> Employee-Attendance >> Employee Maintenance)
2. Enter or select an employee ID.
3. Select the time code to inactivate.
4. Mark Inactive and choose Save.

Deleting an attendance employee maintenance record

Use the Attendance Employee Maintenance window to delete an attendance employee maintenance record. You can delete an attendance employee maintenance record if a time code isn’t applicable. For instance, if the employee isn’t eligible for vacation pay, you would delete the vacation record.

If you want to save the attendance history, simply mark Inactive rather than deleting the attendance record. For more information about inactivating an attendance employee maintenance record, refer to Inactivating an attendance employee maintenance record on page 93.

To delete an attendance employee maintenance record:

1. Open the Attendance Employee Maintenance window.
   (Cards >> Human Resources >> Employee-Attendance >> Employee Maintenance)

2. Enter or select an employee ID.

3. Enter or select a time code to delete.

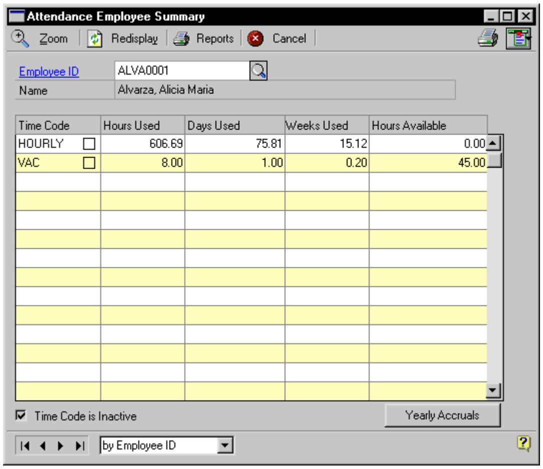
4. Choose Delete.

Viewing employee time code balances

Use the Attendance Employee Summary window to view employee time code balances without entering transactions or making changes. This window will display the hours used, days used, weeks used and the hours available for each time code for an employee.

To view employee time code balances:

1. Open the Attendance Employee Summary window.
   (Cards >> Human Resources >> Employee-Attendance >> Employee Summary)



Employee ID: ALVA0001
Name: Alvarza, Alicia Maria

Time Code	Hours Used	Days Used	Weeks Used	Hours Available
HOURLY ☐	606.69	75.81	15.12	0.00
VAC ☐	8.00	1.00	0.20	45.00

☑ Time Code is Inactive

2. Enter or select an employee ID and review the information.

3. For more information, highlight a record and choose Zoom. The Attendance Employee Maintenance window will display the specific time code information.

4. Choose Redisplay if you've recently made changes to a transaction.

5. Choose Yearly Accruals to open the Employee Yearly Accruals window and view time that has accrued for the year.

Chapter 14: Attendance Transactions

Use the Attendance Transaction Entry window to enter adjusting transactions and time and attendance transactions. Enter adjusting transactions to create beginning amounts of time or to change employees' existing time balances. Adjusting entries aren't posted to the general ledger. You can enter time and attendance transactions to record the way your employees have spent their time during the week.

This information is divided into the following sections:

- *Using attendance*
- *Entering or adjusting available attendance hours*
- *Creating an attendance transaction*
- *Adjusting or deleting an attendance transaction*
- *Accruing attendance transactions*

Using attendance

If you chose to accrue benefit time using attendance in the Attendance Setup window, you should enter all transactions that track employee time in the Attendance Transaction Entry window. Hourly, vacation and sick transactions track employee time. Use the Payroll Transaction Entry window to enter other transactions, such as commission, bonus and expense transactions.

If you accrue benefit time using attendance and accrue by post once, interval or pay period, you only need to enter benefit transactions for salaried employees. For example, suppose a salaried employee worked 32 hours and took 8 hours of vacation time. You would enter a transaction for only the 8 vacation hours—not the 32 hours.

If you chose to accrue using Payroll in the Attendance Setup window, you should enter all transactions in the Payroll Transaction Entry window. Use the following table to determine which windows to use when entering attendance transactions.

Product	Accrue benefit time	Windows to use
Human Resources only	Attendance feature	Use the Attendance Transaction Entry window to enter all employee attendance transactions.

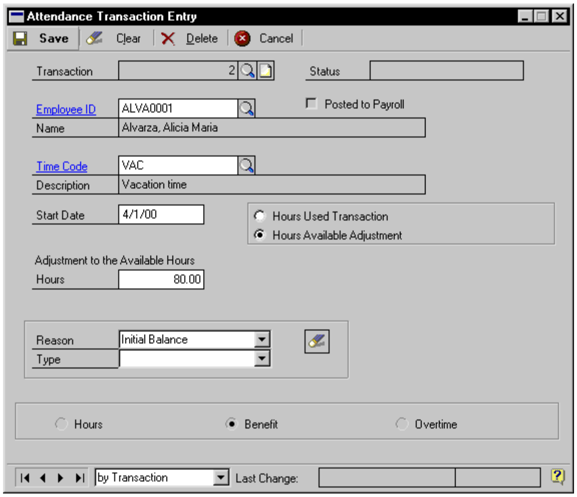
Product	**Accrue benefit time**	**Windows to use**
Human Resources with Integration to Payroll	Attendance feature	Use the Attendance Transaction Entry window to enter transactions that track employee time, such as hourly, vacation and sick transactions and use the Payroll Transaction Entry window to enter other transactions, such as commission, bonus and expense transactions.
Human Resources with Integration to Payroll	Payroll	Use the Payroll Transaction Entry window to enter all employee pay transactions.

Entering or adjusting available attendance hours

Use the Attendance Transaction Entry window to enter available attendance hours for new employees or to adjust the available attendance hours in existing employee records.

To enter or adjust available attendance hours:

1. Open the Attendance Transaction Entry window.
   (Cards >> Human Resources >> Employee-Attendance >> Transaction Entry)



Transaction 2
Status
☐ Posted to Payroll
Employee ID ALVA0001
Name Alvarza, Alicia Maria
Time Code VAC
Description Vacation time
Start Date 4/1/00
○ Hours Used Transaction
● Hours Available Adjustment
Adjustment to the Available Hours
Hours 80.00
Reason Initial Balance
Type
○ Hours ● Benefit ○ Overtime
by Transaction
Last Change:

The number in the Transaction field automatically will increase to the next transaction number each time a transaction is created.

2. Enter or select an employee ID.
3. Mark Hours Available Adjustment. The fields displayed in the window will change.

Any entries you make when you mark Hours Available Adjustment won't be posted to Payroll. However, the Available fields in the Employee Vacation-Sick Time Maintenance window will be updated.

4. Select a time code.
5. In the Adjustment to Available Hours field, enter the number of hours to add to or subtract from the employee's balance. Use a minus sign if you are subtracting hours.
6. Select a reason for adjusting the available hours.

If you select Initial Balance or Balance Adjustment, the entry won't be posted to Payroll.

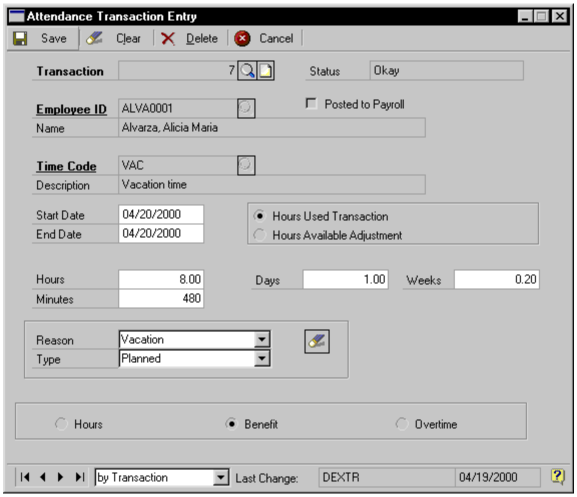
7. Mark Hours, Benefits or Overtime. The default selection is based on the type of time code you're entering.
8. Choose Save.

Creating an attendance transaction

Use the Attendance Transaction Entry window to create attendance transactions.

To create an attendance transaction:

1. Open the Attendance Transaction Entry window.
   (Cards >> Human Resources >> Employee-Attendance >> Transaction Entry)



Transaction 7
Status Okay
Employee ID ALVA0001
☐ Posted to Payroll
Name Alvarza, Alicia Maria
Time Code VAC
Description Vacation time
Start Date 04/20/2000
End Date 04/20/2000
● Hours Used Transaction
○ Hours Available Adjustment
Hours 8.00
Minutes 480
Days 1.00
Weeks 0.20
Reason Vacation
Type Planned
○ Hours ● Benefit ○ Overtime
by Transaction
Last Change: DEXTR 04/19/2000

The number in the Transaction field automatically will increase to the next transaction number.

2. Enter or select an employee ID and select a time code.

3. Mark Hours Used Transaction.

4. Enter the transaction start and end dates. The dates must be within the pay period range for that time code. For information about defining pay period ranges, refer to *Setting up pay periods* in Chapter 6, "Attendance Setup," of the Human Resources Installation and Setup manual.

5. Enter the number of hours, days or weeks worked or spent.

   If you have defined the Days per Week and Hours per Day in the Attendance Setup window, the system will generate the numbers automatically for the other fields not entered.

6. Select a reason for the transaction and a transaction type, if the time code type is salary, benefit, absence or other. For information about creating your own transaction reasons, refer to *Setting up attendance* in Chapter 6, “Attendance Setup,” of the Human Resources Installation and Setup manual.

Hours, Benefits, or Overtime will be marked automatically based on the type of time code you enter.

7. Choose Save.

Adjusting or deleting an attendance transaction

Use the Attendance Transaction Entry window to adjust or delete attendance transactions.

Transactions created by accruing benefit time cannot be adjusted or deleted. Rather, a new adjusting entry must be made.

To adjust or delete an attendance transaction:

1. Open the Attendance Transaction Entry window.
   (Cards >> Human Resources >> Employee-Attendance >> Transaction Entry)

2. Select a transaction, make your changes and choose Save.

3. To delete a transaction, choose Delete.

Accruing attendance transactions

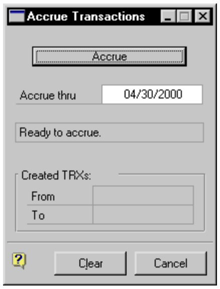
Use the Accrue Transactions window to create accrual transactions. An employee can accumulate—or accrue—benefit time, such as vacation hours or sick leave. Benefit times are usually based on a company’s policy that is applied to all employee records.

For example, most employees at Universal Industries earn vacation time based on a simple schedule—at the end of their first six months of work, they get 24 hours of vacation time; at the end of the first year, they earn another 40 hours. At the end of years two through five, they earn 80 hours of vacation time. From five to 10 years, they earn 120 hours of vacation time per year. Each of these allotments can be defined as an accrual.

If you use Human Resources with Integration to Payroll and accrue benefit time using Payroll, you cannot accrue attendance transactions using Human Resources. To accrue vacation and sick time in Payroll, refer to Chapter 5, “Employee Classes,” in the Payroll manual.

To accrue an attendance transaction:

1. Open the Accrue Transactions window.
   (Cards >> Human Resources >> Employee-Attendance >> Accrue Transactions)



Accrue thru 04/30/2000

Ready to accrue.

2. In the Accrue Thru field, enter the date that reflects the date on which you’re basing your benefit time accruals.

   For example, suppose that Mary Jones will earn 40 hours of vacation time on her anniversary date, June 20. Bob Smith will earn his next allotment of vacation time on June 24.

   The pay period ends June 21, so enter that date in the Accrue thru field. Vacation time up to and including June 21 will be calculated. Bob’s vacation time won’t be effective until an accrual batch with a date of June 24 or later is posted.

3. Choose Accrue.

Chapter 15: Vacation Planning

To help you track your employees' planned absences, use the Vacation Calendar window. You can enter basic information about employees' planned absences, view a graphical representation of planned absences within your organization for a particular month, or for a particular employee. You also can view information about the absences by division, department and position.

Use the Vacation Calendar window to connect the employees' vacation schedules to their attendance records. If you marked Enable Direct Link to Vacation Calendar in the Attendance Setup window, you can open the Attendance Transaction Entry window from the Vacation Planning window. After entering items in the Transaction Entry window, the vacation calendar will show benefit and absence transactions.

This information is divided into the following sections:

- *Creating an absence entry transaction*
- *Adjusting or deleting an absence entry transaction*
- *Creating an absence entry record*
- *Modifying or deleting an absence entry record*
- *Viewing employee vacation information*

Creating an absence entry transaction

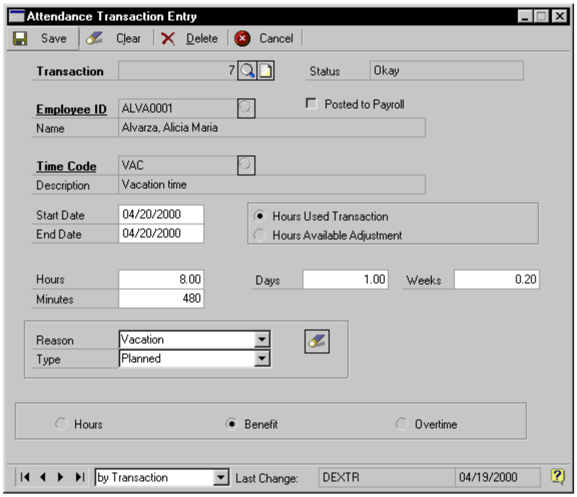
Use the Attendance Transaction Entry window to create absence entry transactions using benefit time codes.

This procedure assumes you marked Enable Direct Link to Vacation Calendar in the Attendance Setup window. If you didn't mark Enable Direct Link to Vacation Calendar, the Absence Entry window will open when you choose Absence Entry. For more information about the Enable Direct Link to Vacation Calendar option, refer to Setting up attendance in Chapter 6, "Attendance Setup," of the Human Resources Installation and Setup manual.

To create an absence entry transaction:

1. Open the Vacation Calendar window.
   (Cards >> Human Resources >> Employee-Attendance >> Vacation Planning)

2. Choose the Absence Entry button to open the Attendance Transaction Entry window.



Transaction: 7
Status: Okay
Employee ID: ALVA0001
☐ Posted to Payroll
Name: Alvarza, Alicia Maria
Time Code: VAC
Description: Vacation time
Start Date: 04/20/2000
End Date: 04/20/2000
● Hours Used Transaction
○ Hours Available Adjustment
Hours: 8.00
Minutes: 480
Days: 1.00
Weeks: 0.20
Reason: Vacation
Type: Planned
○ Hours ● Benefit ○ Overtime
by Transaction
Last Change: DEXTR 04/19/2000

The number in the Transaction field automatically will increase to the next transaction number.

3. Enter or select an employee ID.

4. Select a time code. Only time codes with a type of Benefit or Absent will post to the Vacation Calendar.

5. Mark Hours Used Transaction.

6. Enter the transaction start and end dates. The dates must be within the pay period range for that time code. For information about defining pay period ranges, refer to *Setting up pay periods* in Chapter 6, "Attendance Setup," of the Human Resources Installation and Setup manual.

7. Enter the number of hours, days or weeks worked or spent. If you have defined the Days per Week and Hours per Day in the Attendance Setup window, the system will generate the numbers automatically for the other fields entered.

8. Select a reason for the transaction and a transaction type. For information about creating your own transaction reasons, refer to *Setting up attendance* in Chapter 6, "Attendance Setup," of the Human Resources Installation and Setup manual.

Hours, Benefits, or Overtime will be marked automatically based on the type of time code you enter.

9. Choose Save.

Adjusting or deleting an absence entry transaction

Use the Attendance Transaction Entry window to adjust or delete absence entry transactions.

Transactions created by accruing benefit time cannot be deleted. Rather, an adjusting entry must be made.

To adjust or delete an absence entry transaction:

1. Open the Attendance Transaction Entry window.
   (Cards >> Human Resources >> Employee-Attendance >> Transaction Entry)

2. Select the transaction to edit and make changes as needed. Choose Save.

3. To delete a transaction, select the transaction and choose Delete.

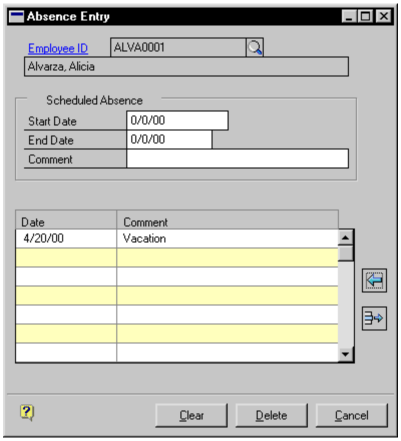
Creating an absence entry record

Use the Absence Entry window to create an absence entry record. You can create an absence entry record before the employee is absent for a planned absence, such as a vacation. Only Benefit and Absent time code entries will be posted entries to the Vacation Planning calendar.

This procedure assumes Enable Direct Link to Vacation Calendar in the Attendance Setup window is ***not*** *marked. If you marked Enable Direct Link to Vacation Calendar box, the Attendance Transaction Entry window will open when you choose Absence Entry. For more information, refer to Setting up attendance in Chapter 6, "Attendance Setup," of the Human Resources Installation and Setup manual.*

To create an absence entry record:

1. Open the Absence Entry window.
   (Cards >> Human Resources >> Employee - Attendance >> Vacation Planning >> Absence Entry)



Employee ID: ALVA0001
Alvarza, Alicia

Start Date: 0/0/00
End Date: 0/0/00
Comment:

Date	Comment
4/20/00	Vacation

2. Enter or select an employee ID.

3. Enter a start date, end date and any comments for the absence.

4. Choose the insert icon button to save the entries created.

Modifying or deleting an absence entry record

Use the Absence Entry window to modify or delete an absence entry record.

If you need to change a series of planned absence records, it might be more convenient to delete the entries you want to change, and reenter them.

To modify an absence entry record:

1. Open the Absence Entry window.
   (Cards >> Human Resources >> Employee-Attendance >> Vacation Planning >> Absence Entry)

2. Enter or select an employee ID and select the entry to modify.

3. Choose the select icon button to make the entry available to edit and make your changes in the Scheduled Absence fields.

4. Choose the insert icon button. The information will be displayed in the scrolling window.

To delete an absence entry record:

1. Open the Absence Entry window.
   (Cards >> Human Resources >> Employee-Attendance >> Vacation Planning >> Absence Entry)

2. Enter or select an employee ID and select the entry to delete.

3. Choose the delete icon button. You can delete one item or all items.

Viewing employee vacation information

You can use the Vacation Calendar window to enter basic information about employees' planned absences, view a graphical representation of planned absences within your organization for a particular month, or for a particular employee. You also can view employee's absence information by division, department, position, month, and year from 1994 to 2015.

If you view the vacation calendar by date, the absence information is represented on the calendar with blue X's. A date with a blue X has at least one scheduled absence.

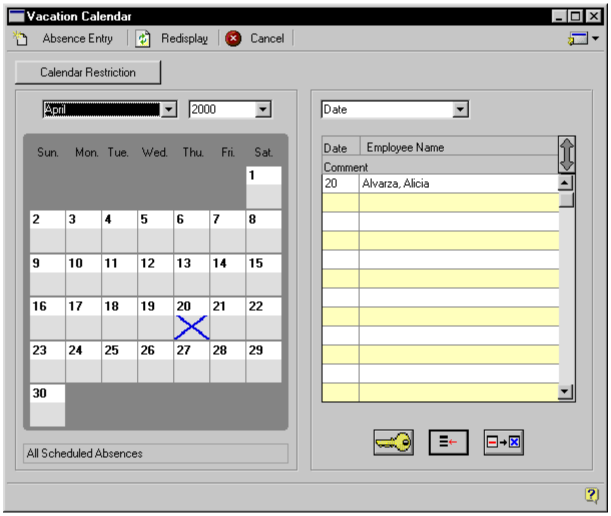
If you view the vacation calendar by employee, the absence information is represented on the calendar with red arrows. A box with a red line indicates an employee will be gone on that date. A left-pointing arrow means the employee's absence is continued from the previous month and a right-pointing arrow indicates the employee's absence continues into the next month. A wavy line indicates more than one employee is absent on that day.

Use the hide and show buttons to view additional information in the scrolling window.

Choose the key icon button to see a list of all the absence symbols included in the Vacation Calendar Key window.

To view employee vacation information:

1. Open the Vacation Calendar window.
   (Cards >> Human Resources >> Employee-Attendance >> Vacation Planning)


Vacation Calendar
Absence Entry
Redisplay
Cancel
Calendar Restriction
Sun.
Mon.
Tue.
Wed.
Thu.
Fri.
Sat.
All Scheduled Absences
Date
Employee Name
Comment

April 2000

Date

Date	Employee Name
20	Alvarza, Alicia

2. Select a month and year to view information.

3. Select to view information by date or employee ID.

   If you select Date, all scheduled employee absence records for the month will be sorted by date. If you select Employee ID, absence records will be sorted by the employees’ ID numbers.

4. To view information by division, department or position, choose Calendar Restriction to open the Calendar Restriction window.

5. Select a restriction and choose the specific division, department, position or employee ID to view.

6. Choose OK to apply these specifications to the Vacation Calendar window.

Chapter 16: Attendance Transaction Transfer and Log

Use the Attendance Transaction Transfer window to transfer attendance transactions to Payroll batches and then view the transactions that were transferred to Payroll in the Attendance Transaction Transfer Log.

This information is divided into the following sections:

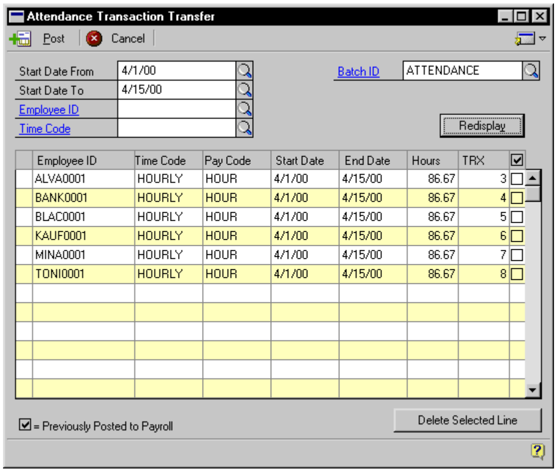
- *Transferring attendance transactions to Payroll*
- *Viewing the attendance transaction transfer log*

Transferring attendance transactions to Payroll

Use the Attendance Transaction Transfer window to transfer the attendance transactions to a Payroll batch. You can create a Payroll batch using the Payroll Batch Entry window. For more information about creating Payroll batches, refer to the Payroll documentation.

To transfer attendance transactions to payroll:

1. Open the Attendance Transaction Transfer window.
   (Cards >> Human Resources >> Employee-Attendance >> Attnd TRX)



Start Date From 4/1/00
Start Date To 4/15/00
Employee ID
Time Code
Batch ID ATTENDANCE

Employee ID	Time Code	Pay Code	Start Date	End Date	Hours	TRX	☑
ALVA0001	HOURLY	HOUR	4/1/00	4/15/00	86.67	3	☐
BANK0001	HOURLY	HOUR	4/1/00	4/15/00	86.67	4	☐
BLAC0001	HOURLY	HOUR	4/1/00	4/15/00	86.67	5	☐
KAUF0001	HOURLY	HOUR	4/1/00	4/15/00	86.67	6	☐
MINA0001	HOURLY	HOUR	4/1/00	4/15/00	86.67	7	☐
TONI0001	HOURLY	HOUR	4/1/00	4/15/00	86.67	8	☐

☑ = Previously Posted to Payroll

2. Enter the beginning and ending dates that include records for the transaction.

3. Enter or select an employee ID. If you leave this field blank, all employee transactions will be included.

4. Choose a time code. If you leave this field blank, all time codes will be included.

5. Enter or select a Payroll batch ID. If you enter a new batch ID, you must create the Payroll batch before creating transactions in this window. Choose Batch ID to open the Payroll Batch Entry window and create a Payroll batch. For more information, refer to the Payroll documentation.

6. Choose Save. The transactions from this window will be transferred to Payroll. If the employee doesn't have enough vacation or sick hours available to cover the transaction, an alert message will be displayed but the transaction will continue. You'll have the option to print the Payroll Transaction Audit List report.

   If TRX (Transaction number) is marked, the transaction has been previously posted to accounting. Do not repost the transaction.

   - If the message, "Posting Aborted. Check report for errors and fix before attempting again" appears, no transactions were posted to Payroll. Keep the window open, correct the errors listed on the Payroll Setup Errors for Post to Payroll report and try posting again.

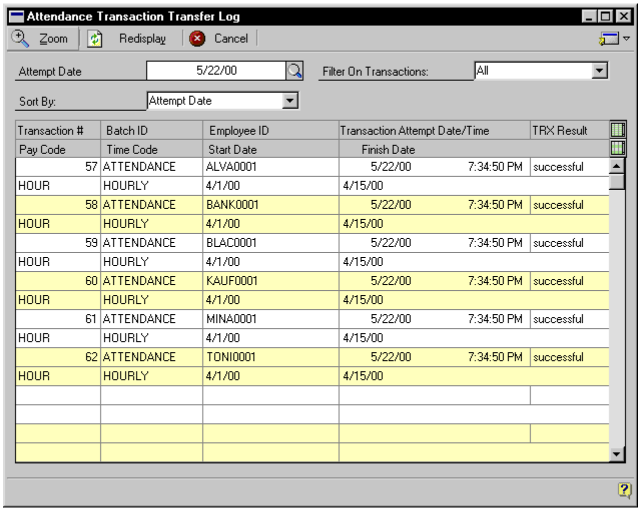
   - If the message, "Emp. <Emp ID> pay rec. <pay code> doesn't exist" appears, the pay code hasn't been assigned to the employee record in Payroll. Use the Employee Pay Code Maintenance window to assign the pay code to the employee.

Viewing the attendance transaction transfer log

Use the Attendance Transaction Transfer Log window to view the transactions that were transferred to Payroll using Payroll batches. Transactions created in the Attendance Transaction Entry window will be displayed in the scrolling window. You can view transaction numbers, batch IDs, transaction attempt dates, and the transaction results.

To view the attendance transaction transfer log:

1. Open the Attendance Transaction Transfer Log window.
   (Cards >> Human Resources >> Employee-Attendance >> Attnd TRX Log)



Attempt Date: 5/22/00

Filter On Transactions: All

Sort By: Attempt Date

Transaction #	Batch ID	Employee ID	Transaction Attempt Date/Time		TRX Result
Pay Code	Time Code	Start Date	Finish Date		
57	ATTENDANCE	ALVA0001	5/22/00	7:34:50 PM	successful
HOUR	HOURLY	4/1/00	4/15/00		
58	ATTENDANCE	BANK0001	5/22/00	7:34:50 PM	successful
HOUR	HOURLY	4/1/00	4/15/00		
59	ATTENDANCE	BLAC0001	5/22/00	7:34:50 PM	successful
HOUR	HOURLY	4/1/00	4/15/00		
60	ATTENDANCE	KAUF0001	5/22/00	7:34:50 PM	successful
HOUR	HOURLY	4/1/00	4/15/00		
61	ATTENDANCE	MINA0001	5/22/00	7:34:50 PM	successful
HOUR	HOURLY	4/1/00	4/15/00		
62	ATTENDANCE	TONI0001	5/22/00	7:34:50 PM	successful
HOUR	HOURLY	4/1/00	4/15/00		

2. Enter or select a date in the Attempt Date field to view attendance transactions that attempted to transfer to Payroll.

3. Select a filter to display the transactions.

4. Choose the hide and show buttons to view additional information such as the pay codes and time codes assigned to the transactions and the start and finish dates of the transactions.

5. To view a transaction in greater detail, select it and then choose Zoom to open the Attendance Transaction Transfer Log View window.

6. Close the window.

PART 4: EMPLOYEE BENEFITS

Part 4: Employee Benefits

This part of the documentation describes how to enter employee benefit information, including enrolling employees in benefits and tracking Family and Medical Leave Act (FMLA) and Consolidated Omnibus Reconciliation Act (COBRA) information.

The following information is discussed:

Chapter 17, "Benefit Enrollment," explains how to enroll employees in your organization's benefits plans, view an overview of each employee's benefits enrollment and access other benefit windows for changing employee benefit information.

Chapter 18, "Family and Medical Leave Act (FMLA)," describes how to track an employee FMLA leave and an employee's payments of premiums due during the FMLA period

Chapter 19, "COBRA," explains how to inform employees of their rights under the COBRA legislation, initiate COBRA coverage for those employees who take advantage of this provision and track the monthly payments employees will make to continue their coverage.

Chapter 20, "Benefit Summary and History," describes how to view the benefits that are offered to employees, sign them up for benefits, and maintain historical records of employee changes to benefits plans and enrollments.

Chapter 21, "Total Compensation," explains how to provide your employees with a summary of their entire compensation packages, including pay, insurance and other benefits, so they are aware of the value of their total compensation.

Chapter 17: Benefit Enrollment

Benefits are programs administered by the company for the employees. Benefits can include different kinds of health insurance—medical, dental, and vision plans—life insurance and retirement plans. A benefit is considered an expense for the employer.

This information is divided into the following sections:

- *Using the Payroll View for Human Resources*
- *Verifying employee benefit enrollment information*
- *Enrolling an employee in a health insurance plan*
- *Enrolling an employee in a life insurance plan*
- *Enrolling an employee in a retirement plan*
- *Enrolling an employee in a cash account*
- *Adding an employee beneficiary record*
- *Completing a benefit or deduction enrollment*

Using the Payroll View for Human Resources

If you marked Payroll View for Human Resources in the User Setup window, a message will appear to indicate that you must set up the corresponding codes in Payroll to complete the integration.

If you didn't mark Payroll View for Human Resources in the User Setup window, the benefit enrollment will be incomplete. Use the Reconcile Human Resources window to update the benefit definitions.

Use the following table to determine which windows to use when enrolling employees in benefits.

Product	**Payroll View for Human Resources is marked**	**Windows to use**
Human Resources only	N/A	Use the benefit enrollment windows only to enroll employees in benefits.
Human Resources with Integration to Payroll	yes	After you enroll an employee in a benefit and choose save, a message will appear to indicate that you must set up the corresponding codes in Payroll to complete the integration.

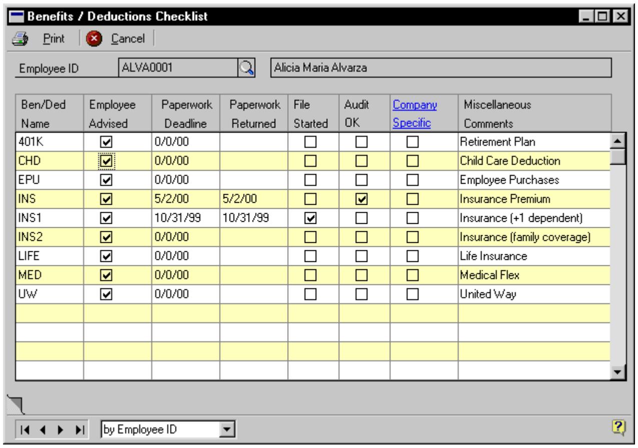
Product	**Payroll View for Human Resources is marked**	**Windows to use**
Human Resources with Integration to Payroll	no	After you enroll an employee in a benefit and choose save, the benefit enrollment will be incomplete. Use the Reconcile Human Resources window to update the benefit enrollments.

Verifying employee benefit enrollment information

You can use the Benefits/Deductions Checklist to verify that employees are meeting deadlines for enrollment and paperwork. You can also use this window to visually check statuses as well as maintain “To-Do” items.

To verify employee benefit enrollment information:

1. Open the Benefits/Deductions Summary window.
   (Cards >> Human Resources >> Employee - Benefits >> Ben/ Deduction Sum)
2. Enter or select an employee ID.
3. Using the page turn icon button, open the Benefits/Deductions Checklist.



Employee ID ALVA0001 Alicia Maria Alvarza

Ben/Ded Name	Employee Advised	Paperwork Deadline	Paperwork Returned	File Started	Audit OK	Company Specific	Miscellaneous Comments
401K	☑	0/0/00		☐	☐	☐	Retirement Plan
CHD	☑	0/0/00		☐	☐	☐	Child Care Deduction
EPU	☑	0/0/00		☐	☐	☐	Employee Purchases
INS	☑	5/2/00	5/2/00	☐	☑	☐	Insurance Premium
INS1	☑	10/31/99	10/31/99	☑	☐	☐	Insurance (+1 dependent)
INS2	☑	0/0/00		☐	☐	☐	Insurance (family coverage)
LIFE	☑	0/0/00		☐	☐	☐	Life Insurance
MED	☑	0/0/00		☐	☐	☐	Medical Flex
UW	☑	0/0/00		☐	☐	☐	United Way

4. Mark the benefit when the employee has been told of the benefit.

5. Enter paperwork deadline dates. The paperwork returned date and the File Started field will display information when the plan status for this benefit is active in the benefit enrollment window.

6. Mark the check boxes when the audit is OK.

7. Use the company specific column to store any additional information, such as attending a meeting to discuss this employee's benefit.

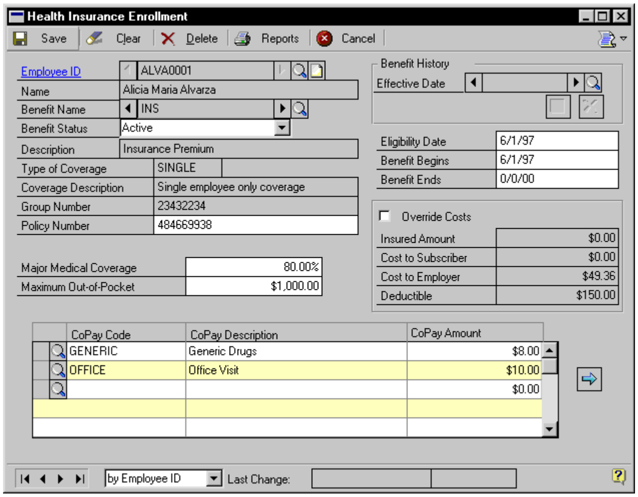
8. View the information and close the window when you've finished. The information is saved when you close the window.

Enrolling an employee in a health insurance plan

Use the Health Insurance Enrollment window to enroll an employee in a health insurance plan. A health insurance plan can be medical insurance, dental insurance or vision insurance. To define a health insurance plan, refer to *Setting up a health insurance benefit* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

To enroll an employee in a health insurance plan:

1. Open the Health Insurance Enrollment window. (Cards >> Human Resources >> Employee-Benefits >> Health Insurance)



Employee ID	ALVA0001
Name	Alicia Maria Alvarza
Benefit Name	INS
Benefit Status	Active
Description	Insurance Premium
Type of Coverage	SINGLE
Coverage Description	Single employee only coverage
Group Number	23432234
Policy Number	484669938
Major Medical Coverage	80.00%
Maximum Out-of-Pocket	$1,000.00
Effective Date	
Eligibility Date	6/1/97
Benefit Begins	6/1/97
Benefit Ends	0/0/00
☐ Override Costs	
Insured Amount	$0.00
Cost to Subscriber	$0.00
Cost to Employer	$49.36
Deductible	$150.00

CoPay Code	CoPay Description	CoPay Amount
GENERIC	Generic Drugs	$8.00
OFFICE	Office Visit	$10.00
		$0.00

2. Enter or select an employee ID.

3. Enter or select a benefit name and select a benefit status.

4. Enter the policy number of this employee's plan, or accept the default policy number—the employee's Social Security number.

5. Major Medical Coverage and Maximum Out-of-Pocket fields will be the default entries from the Health Insurance Definition window. You can enter additional information or make changes to the existing records.

   The Eligibility Date will be calculated automatically. Eligibility date is calculated from the employee's hire date in the Employee Maintenance window and adding the number of days you entered in the Waiting Period field in the Health Insurance Definition window.

6. Enter the beginning date and the ending date for the health insurance plan. If it's a continuous plan, leave the ending field blank.

7. Mark Override Costs if you don't want this record to be affected by cost changes—such as premium increases.

8. Assign a copayment code and enter or change the copayment code amount, if necessary. If you assigned copayment codes in the Health Insurance Setup window, these codes will be displayed.

9. Choose Save. Depending on the Benefit Preferences you selected, a message might appear, giving you the option to post the benefit eligibility date to the To-Do List. For more information, refer to *Setting up benefit preferences* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

   - If you marked Payroll View for Human Resources in the User Setup window, a message will appear to indicate that you must set up the corresponding codes in Payroll to complete the integration.

   - If you didn't mark Payroll View for Human Resources in the User Setup window, the benefit enrollment will be incomplete. Use the Reconcile Human Resources window to update the benefit definitions.

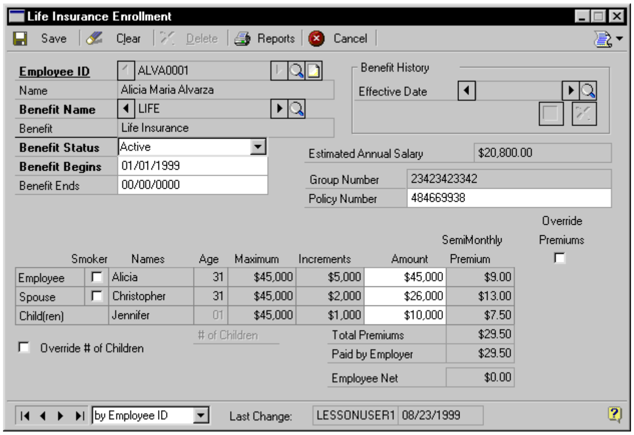
Enrolling an employee in a life insurance plan

Use the Life Insurance Enrollment window to enroll an employee in a life insurance plan. You can set up an age-based insurance table or a fixed amount benefit. Premiums for an aged-based benefit change with the employee’s age. To define a life insurance plan, refer to *Setting up an age-based life insurance benefit* and *Setting up a fixed amount life insurance benefit* in Chapter 7, “Benefit Setup,” of the Human Resources Installation and Setup manual.

If you’re using an age-based insurance table, you must have entered the employee’s date of birth in the Employee Maintenance window before the system can calculate the appropriate premiums.

To enroll an employee in a life insurance plan:

1. Open the Life Insurance Enrollment window.
   (Cards >> Human Resources >> Employee-Benefits >> Life Insurance)



Employee ID ALVA0001
Name Alicia Maria Alvarza
Benefit Name LIFE
Benefit Life Insurance
Benefit Status Active
Benefit Begins 01/01/1999
Benefit Ends 00/00/0000
Estimated Annual Salary $20,800.00
Group Number 23423423342
Policy Number 484669938
Override Premiums ☐

	Smoker	Names	Age	Maximum	Increments	Amount	SemiMonthly Premium
Employee	☐	Alicia	31	$45,000	$5,000	$45,000	$9.00
Spouse	☐	Christopher	31	$45,000	$2,000	$26,000	$13.00
Child(ren)		Jennifer	01	$45,000	$1,000	$10,000	$7.50

☐ Override # of Children
# of Children
Total Premiums $29.50
Paid by Employer $29.50
Employee Net $0.00
by Employee ID
Last Change: LESSONUSER1 08/23/1999

2. Enter or select an employee ID and a life insurance plan for this employee.

3. Select a benefit status.

4. Enter the beginning date and the ending date for the health insurance plan. If it’s a continuous plan, leave the ending field blank. If you entered a plan term date in the Life Insurance Setup window, that date will be displayed in the beginning date field.

5. Enter the policy number of this employee's plan, or accept the default policy number—the employee's Social Security number.
6. If applicable to this policy, mark Smoker if the employee or the employee's spouse is a smoker.
7. The number of children that have been entered for this employee in the Employee Beneficiaries window will be displayed in the # of Children (Number of Children) field. To change that number, mark Override and make your changes.
8. Enter insurance amounts for the employee, spouse and children. The premium amount for the children will be calculated by the number of children multiplied by the amount.
9. Mark Override Costs if you don't want this record to be affected by cost changes—such as premium increases.
10. Choose Save.
    - If you marked Payroll View for Human Resources in the User Setup window, a message will appear to indicate that you must set up the corresponding codes in Payroll to complete the integration.
    - If you didn't mark Payroll View for Human Resources in the User Setup window, the benefit enrollment will be incomplete. Use the Reconcile Human Resources window to update the benefit definitions.

Enrolling an employee in a retirement plan

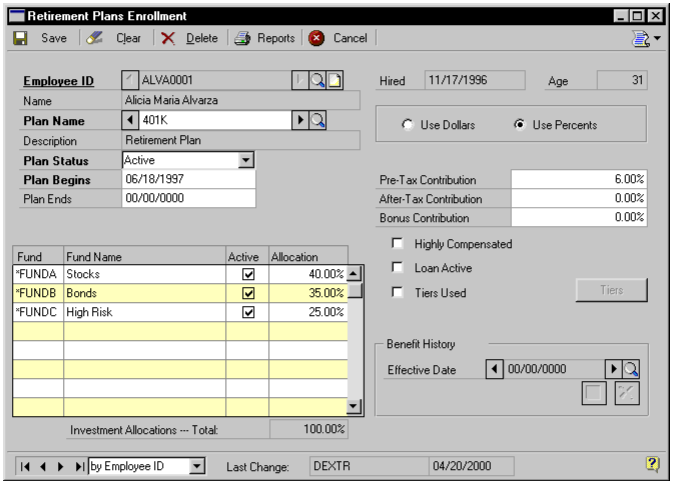
Use the Retirement Plans Enrollment window to enroll an employee in a retirement plan. To define retirement plans, refer to *Setting up a retirement plan* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

If you have several active retirement funds, you can show how each employee is splitting his or her investment among the funds by selecting the fund and entering the amount or percentage of the employee's retirement plan amount that will go to that fund.

For example, suppose that Universal Industries' retirement fund offers four funds: A, B, C and D. Jane Smith, a Universal employee, participates in the retirement plans program. She puts 40 percent of her contribution into Fund A, and 20 percent into each of the other three funds for a total of 100 percent.

To enroll an employee in a retirement plan:

1. Open the Retirement Plans Enrollment window.
   (Cards >> Human Resources >> Employee-Benefits >> Retirement Plans)



Employee ID ALVA0001
Name Alicia Maria Alvarza
Plan Name 401K
Description Retirement Plan
Plan Status Active
Plan Begins 06/18/1997
Plan Ends 00/00/0000

Hired 11/17/1996 Age 31

○ Use Dollars ● Use Percents

Pre-Tax Contribution 6.00%
After-Tax Contribution 0.00%
Bonus Contribution 0.00%

☐ Highly Compensated
☐ Loan Active
☐ Tiers Used

Fund	Fund Name	Active	Allocation
*FUNDA	Stocks	☑	40.00%
*FUNDB	Bonds	☑	35.00%
*FUNDC	High Risk	☑	25.00%

Investment Allocations --- Total: 100.00%

Benefit History
Effective Date 00/00/0000

by Employee ID Last Change: DEXTR 04/20/2000

2. Enter or select an employee ID and a retirement plan.

3. Select a benefit status.

4. Enter the beginning date and the ending date for the retirement plan. If it's a continuous plan, leave the ending field blank.

5. Enter the employee's contributions to the retirement plan by marking Use Dollars or Use Percents and entering the applicable amounts in the Pre-Tax field, the After-Tax field, and the Bonus field.

   If the employee meets certain IRS guidelines and is a "highly compensated" employee, mark Highly Compensated. For more information about "highly compensated" employees, refer to the Internal Revenue Code guidelines.

6. Mark Loan Active if the employee is eligible for loans from the retirement plan and record loan information using the note button by the Employee ID.

   If a tiered formula for determining plan contributions is used, mark Tiers Used and choose Tiers to open the Benefit Tiers window. For more information, refer to *Setting up a benefit tier* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

7. Be sure the investment Allocations Total field equals the total amount of the deduction. For instance, if the retirement plan uses dollars, the Allocations Total should be 100.00%. If the retirement plan uses percents, the Allocations Total should be equal to the sum of the amounts in the Pre-Tax Dollar and After-Tax Dollar fields. To create funds, refer to *Setting up a retirement plan* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

8. Choose Save.

   - If you marked Payroll View for Human Resources in the User Setup window, a message will appear to indicate that you must set up the corresponding codes in Payroll to complete the integration. When you save the retirement plan information in the Employee Benefit Maintenance window, the selected deduction which the benefit is based on, will be the deduction that corresponds to the benefit.

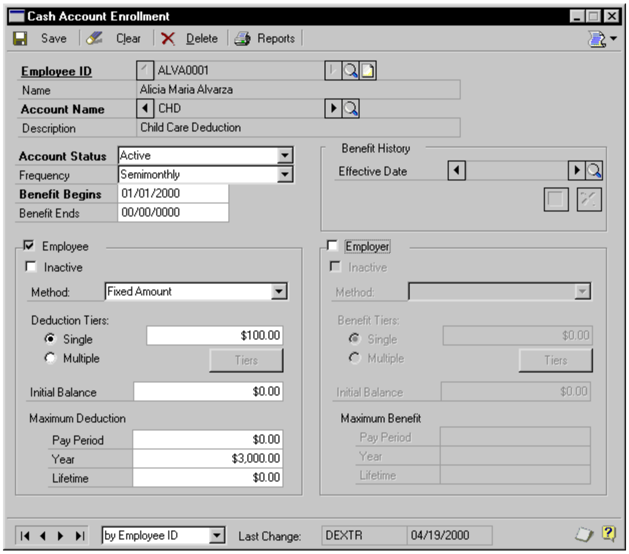
   - If you didn't mark Payroll View for Human Resources in the User Setup window, the benefit enrollment will be incomplete. Use the Reconcile Human Resources window to update the benefit definitions.

Enrolling an employee in a cash account

Use the Cash Accounts Enrollment window to enroll an employee in a cash account. Cash accounts might be garnishments, charity contributions, flexible spending accounts or union dues—expenses to the employee. To define a cash account, refer to *Setting up a cash account* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

To enroll an employee in a cash account:

1. Open the Cash Accounts Enrollment window.
   (Cards >> Human Resources >> Employee-Benefits >> Cash Account)



Employee ID: ALVA0001
Name: Alicia Maria Alvarza
Account Name: CHD
Description: Child Care Deduction
Account Status: Active
Frequency: Semimonthly
Benefit Begins: 01/01/2000
Benefit Ends: 00/00/0000

☑ Employee
☐ Inactive
Method: Fixed Amount
Deduction Tiers:
● Single $100.00
○ Multiple
Initial Balance: $0.00
Maximum Deduction
Pay Period: $0.00
Year: $3,000.00
Lifetime: $0.00

☐ Employer
☐ Inactive
Method:
Benefit Tiers:
● Single $0.00
○ Multiple
Initial Balance: $0.00

by Employee ID
Last Change: DEXTR 04/19/2000

2. Enter or select an employee ID and cash account name.

3. Select an account status and a frequency for the cash account.

4. Enter the beginning date and the ending date for the cash account. If it's a continuous plan, leave the ending field blank.

5. Mark Employee if the employee will contribute to the cash account. Select a method and select a single deduction tier or multiple tiers. If you select a single amount or percent, enter an amount or percent. If you select multiple tiers, choose Tiers and the Tiered Deduction Setup window will open, allowing you to enter tiered deductions.

6. Enter deduction maximums. You can enter the maximum amount an employee can have deducted each pay period, each year and for the entire time the employee works for your company.

7. Mark Employer if the employer will contribute to the cash account. Select a method and select a single deduction tier or multiple tiers. If you select a single amount or percent, enter an amount or percent. If you select multiple tiers, choose Tiers and the Tiered Deduction Setup window will open, allowing you to enter tiered deductions.

8. Enter deduction maximums. You can enter the maximum amount an employee can have deducted each pay period, each year and for the entire time the employee works for your company.

9. Enter an initial balance amount, if necessary.

10. Choose Save.

    - If you marked Payroll View for Human Resources in the User Setup window, a message will appear to indicate that you must set up the corresponding codes in Payroll to complete the integration.

    - If you didn’t mark Payroll View for Human Resources in the User Setup window, the benefit enrollment will be incomplete. Use the Reconcile Human Resources window to update the benefit definitions.

Adding an employee beneficiary record

Use the Employee Beneficiaries window to add beneficiary information for an employee. You can create primary and secondary beneficiary records and assign multiple beneficiaries to a benefit from any benefit enrollment window.

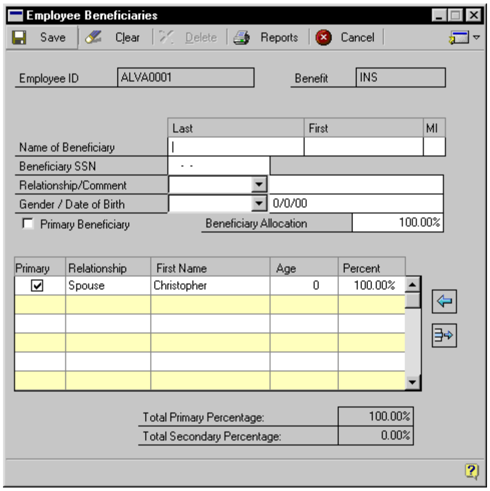
Each benefit record has a separate beneficiary. You will need to add beneficiary information for each benefit.

To add an employee beneficiary record:

1. Open any benefits enrollment window.
   (Cards >> Human Resources >> Employee - Benefits >> Cash Accounts)
   (Cards >> Human Resources >> Employee - Benefits >> Health Insurance)
   (Cards >> Human Resources >> Employee - Benefits >> Life Insurance)
   (Cards >> Human Resources >> Employee - Benefits >> Retirement Plans)

2. Enter or select an employee ID and a benefit.

3. From the benefits icon button, choose Beneficiary Definition to open the Employee Beneficiaries window.



Employee ID: ALVA0001
Benefit: INS
Name of Beneficiary:
Beneficiary SSN: - -
Relationship/Comment:
Gender / Date of Birth: 0/0/00
☐ Primary Beneficiary
Beneficiary Allocation: 100.00%

Primary	Relationship	First Name	Age	Percent
☑	Spouse	Christopher	0	100.00%

Total Primary Percentage: 100.00%
Total Secondary Percentage: 0.00%

4. Enter the first name, last name and Social Security number of the beneficiary.

5. Select the beneficiary's relationship and enter a comment.

6. Select the beneficiary's gender and enter the beneficiary's date of birth.

7. Mark Primary Beneficiary if this beneficiary is the primary beneficiary and enter the percentage of the benefit this beneficiary will receive.

8. To continue entering additional beneficiaries, repeat steps 4 through 7.

9. Choose Save or the insert icon button.

Completing a benefit or deduction enrollment

Use any benefits enrollment window to complete a benefit or deduction enrollment. A benefit or deduction enrollment is incomplete when a user enrolls an employee in a benefit or deduction and Payroll View for Human Resources is not marked in the User Setup window.

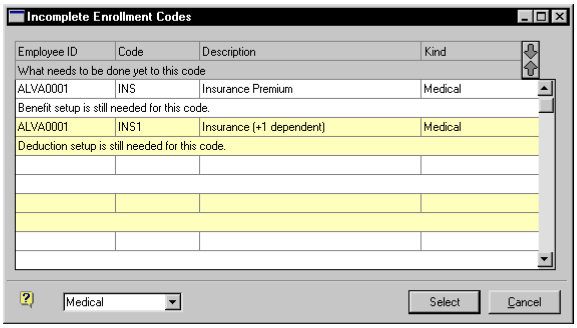
If a employee is enrolled in a benefit or deduction in Payroll but not Human Resources, you must complete the enrollment for the information to be available in Human Resources. For more information about completing a benefit or deduction enrollment, refer to *Reconciling Human Resources information* on page 265.

To complete a benefit or deduction enrollment:

1. Open any benefits enrollment window.
   (Cards >> Human Resources >> Employee - Benefits >> Cash Accounts OR Health Insurance OR Life Insurance OR Retirement Plans)

2. Enter or select an employee ID and a benefit.

3. From the benefit icon button, choose Incompletes to open the Incomplete Enrollment Codes window.



Incomplete Enrollment Codes

Employee ID	Code	Description	Kind
What needs to be done yet to this code			
ALVA0001	INS	Insurance Premium	Medical
Benefit setup is still needed for this code.			
ALVA0001	INS1	Insurance (+1 dependent)	Medical
Deduction setup is still needed for this code.			

4. Highlight the benefit or deduction to complete and choose Select.

   The Employee Benefit Maintenance window will open for a benefit. The Employee Deduction Maintenance window will open for a deduction.

If a benefit is also a deduction, the Employee Deduction Maintenance window will open. After you enter the information and save your changes, the Employee Benefit Maintenance window will open.

5. Enter the information.
6. Choose Save.

Chapter 18: Family and Medical Leave Act (FMLA)

One of the laws that affects many businesses is the Family and Medical Leave Act of 1993 (FMLA). Under this law, businesses that have 50 or more employees—with some exceptions—are required to allow employees to take up to 12 weeks leave for certain family or medical-related events. The law also guarantees that when the employee returns, he or she will be given the same or an equivalent job. Under the law, companies are given the discretion to determine if they or the employee using the FMLA leave will pay the costs of the employee's benefits during the FMLA leave period.

The FMLA system in Human Resources includes the FMLA Initiation window and the FMLA Premiums and Payments window. You can use the FMLA Initiation window to track an employee's FMLA leave and to record starting and ending dates for the leave period and the reason for the leave.

If the employee is responsible for paying benefit premiums while on FMLA leave, you also can note due dates for payment of benefit premiums. Use the FMLA Premiums and Payments window to track an employee's payments of premiums due during the FMLA period.

This information is divided into the following sections:

- *FMLA limitations*
- *Initiating an employee FMLA leave*
- *Adjusting an employee's FMLA leave*
- *Viewing FMLA information*
- *Entering an FMLA premium due*
- *Entering an FMLA payment*
- *Adjusting or deleting an FMLA premium or payment*

FMLA limitations

There are some limitations to using the FMLA system. For example, you can't track part-time employee records automatically, and varying work weeks and advanced leave must be handled on an individual basis. These items can still be included in the FMLA calculations by using the following solutions:

Part-time employees The FMLA system counts all employees as full-time workers. To correctly calculate the FMLA leave time used by a part-time employee, you'll need to mark the employee as working partial days during the leave. Mark Partial next to the What type of days will be taken during this leave? field in the FMLA Initiation window. The How many hours each day will be worked during partial days? field will be activated. Enter the number of hours the employee does not work in a normal workday. The system will correctly calculate the hours of FMLA leave actually used by that employee.

Varying work weeks The work week schedule, plus holidays, is set up in FMLA Calendar, which is a benefit preference. Although specific starting and ending dates for an FMLA year can be entered for an employee, the FMLA Calendar settings can't be changed. All employees in your company must work the same number of days in the week for FMLA to be calculated correctly.

Advance scheduling Human Resources's FMLA system cannot calculate more than one FMLA year in advance, regardless of the type of FMLA year set up in Benefit Preferences.

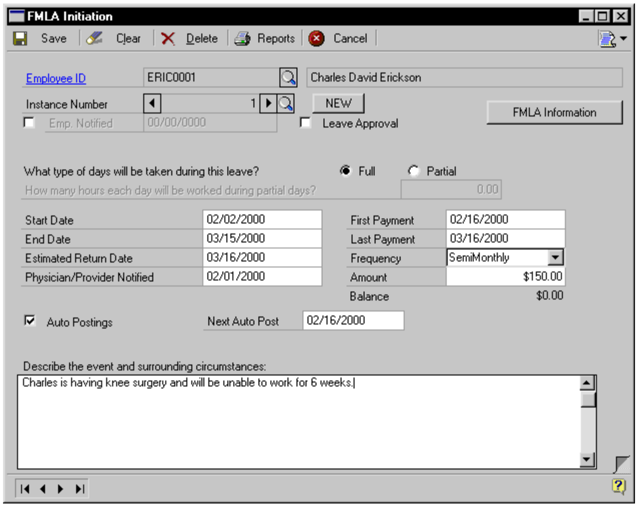
Initiating an employee FMLA leave

Use the FMLA Initiation window to initiate an employee FMLA leave. For example, an employee can use FMLA leave to care for a newborn child or an ill family member.

Before you use the FMLA Initiation window, you must set up your FMLA preferences in the Benefit Preferences window. For more information about setting up FMLA preferences, refer to *Setting up benefit preferences* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

To initiate an employee FMLA leave:

1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)



Employee ID ERIC0001 Charles David Erickson
Instance Number 1
☐ Emp. Notified 00/00/0000
☐ Leave Approval
What type of days will be taken during this leave? ● Full ○ Partial
How many hours each day will be worked during partial days? 0.00
Start Date 02/02/2000
End Date 03/15/2000
Estimated Return Date 03/16/2000
Physician/Provider Notified 02/01/2000
First Payment 02/16/2000
Last Payment 03/16/2000
Frequency SemiMonthly
Amount $150.00
Balance $0.00
☑ Auto Postings
Next Auto Post 02/16/2000
Describe the event and surrounding circumstances:
Charles is having knee surgery and will be unable to work for 6 weeks.

2. Enter or select an Employee ID.

3. Choose New to create a new instance number.

4. Mark the type of leave days—full or partial—that will be taken during this employee's FMLA leave.

5. Accept the default dates or enter the starting date and ending date for the FMLA leave. The default start date will be the system date. The end date displayed will be the date on which the employee's FMLA leave will be exhausted. If this is the employee's first instance of FMLA leave, the ending date will be 12 weeks from the starting date.

6. Accept the default date or enter a date in The Estimated Return Date field. The Estimated Return Date field is calculated automatically based on the End Date.

7. If a physician or insurance provider was notified of the employee's absence, enter that date in the Physician/Provider Notified field, if necessary.

8. If the employee is required to pay the costs of benefits received while on FMLA leave, enter the dates the first and last benefit payments will be due.

9. Select the frequency that payments will be made and enter the amount of each payment in the Amount field. The amount due will be displayed in the Balance field and will be updated when payments are recorded using the FMLA Premiums and Payments window.

   Mark Auto Postings to track the payment schedule. The default date in the Next Auto Post date field will be calculated from the First Payment date. For more information about automatically tracking FMLA premiums and payments, refer to *Entering an FMLA premium due* on page 136 and *Entering an FMLA payment* on page 137.

10. Enter the event and surrounding circumstances for the employee's FMLA leave.

11. Choose Save.

Adjusting an employee's FMLA leave

Use the FMLA Initiation window to adjust an employee's existing FMLA leave. You can change information such as the starting date or ending date, descriptive information about the FMLA event and payment amounts.

Before you use the FMLA Initiation window, you must set up your FMLA preferences in the Benefit Preferences window. For more information about setting up FMLA preferences, refer to *Setting up benefit preferences* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

To adjust an employee's FMLA leave:

1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)

2. Enter or select an Employee ID.

3. Select an Instance Number and make the necessary changes.

4. Choose Save.

Viewing FMLA information

Use the FMLA Information window to see how much FMLA time an employee has used in the current FMLA year, and how much benefit time that employee has remaining for the current FMLA year.

To view FMLA information:

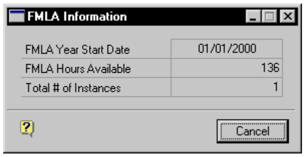
1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)

2. Enter or select an employee ID.

3. Use the Instance Number lookup to select an FMLA leave instance and view the information about the employee's most recent use of FMLA leave.

4. Choose FMLA Information. This button will be dimmed if there has been no FMLA information entered for the employee.

   The FMLA Information window will open, where you can view how many hours of FMLA leave the employee has remaining, the total number of instances in which FMLA was used and the employee's FMLA year start date.



FMLA Year Start Date	01/01/2000
FMLA Hours Available	136
Total # of Instances	1

5. To review FMLA use by all of your company's employees, choose Print in the FMLA Initiation window to open the Benefit Report Options window.

6. Enter or select an option and select the Employee FMLA Balances statement. Enter range restrictions.

You can create only one restriction for each type of information. For example, if you enter a restriction to print records for the first five of 25 employees, you can't enter another restriction to print records for the last 10 employees.

7. Choose Destination to select a report destination.

8. Save and print the report option. The report will list the number of FMLA leaves used by each employee, as well as each employee's remaining hours in the FMLA year.

9. Close the Benefit Report Options window.

Entering an FMLA premium due

You only need to enter an FMLA premium due if you didn't mark auto postings when initiating an employee FMLA leave.

Use the FMLA Premiums and Payments window to track FMLA costs, such as benefit premiums to be paid by the employee during the employee's FMLA leave. You must first initiate FMLA for an employee before entering a premium due.

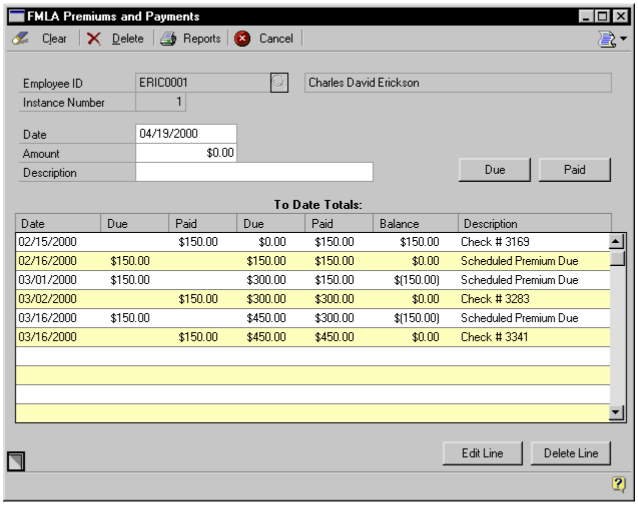
If you marked Auto Postings in the FMLA Initiation window, the information about employee premiums you enter in that window will be displayed in the FMLA Premiums and Payments window.

To enter an FMLA premium due:

1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)

2. Select an employee ID.

3. Choose the page turn icon button to open the FMLA Premiums and Payments window.



Employee ID: ERIC0001 — Charles David Erickson
Instance Number: 1
Date: 04/19/2000
Amount: $0.00
Description:

To Date Totals:

Date	Due	Paid	Due	Paid	Balance	Description
02/15/2000		$150.00	$0.00	$150.00	$150.00	Check # 3169
02/16/2000	$150.00		$150.00	$150.00	$0.00	Scheduled Premium Due
03/01/2000	$150.00		$300.00	$150.00	$(150.00)	Scheduled Premium Due
03/02/2000		$150.00	$300.00	$300.00	$0.00	Check # 3283
03/16/2000	$150.00		$450.00	$300.00	$(150.00)	Scheduled Premium Due
03/16/2000		$150.00	$450.00	$450.00	$0.00	Check # 3341

4. Enter the date the employee began paying the benefit premium.

5. Enter the amount of the premium.

6. In the Description field, enter a brief note that explains that this is a premium due for continuation of benefits during the employee's FMLA leave.

7. Choose Due to save the record.

Entering an FMLA payment

Use the FMLA Premiums and Payments window to track FMLA costs, such as benefit premiums paid by the employee during the employee's FMLA leave. You must first initiate FMLA for an employee before entering a payment.

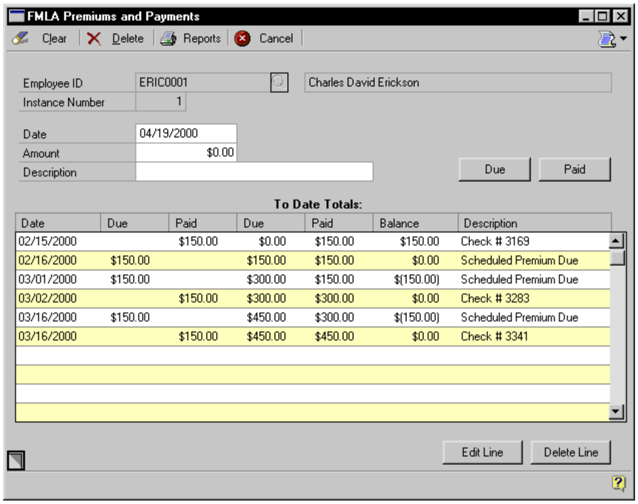
If you marked Auto Postings in the FMLA Initiation window, the information about employee payments you enter in that window will be displayed in the FMLA Premiums and Payments window.

To enter an FMLA payment:

1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)

2. Select an employee ID.

3. Choose the page turn icon button to open the FMLA Premiums and Payments window.



Employee ID ERIC0001 Charles David Erickson
Instance Number 1

Date 04/19/2000
Amount $0.00
Description

			To Date Totals:			
Date	Due	Paid	Due	Paid	Balance	Description
02/15/2000		$150.00	$0.00	$150.00	$150.00	Check # 3169
02/16/2000	$150.00		$150.00	$150.00	$0.00	Scheduled Premium Due
03/01/2000	$150.00		$300.00	$150.00	$(150.00)	Scheduled Premium Due
03/02/2000		$150.00	$300.00	$300.00	$0.00	Check # 3283
03/16/2000	$150.00		$450.00	$300.00	$(150.00)	Scheduled Premium Due
03/16/2000		$150.00	$450.00	$450.00	$0.00	Check # 3341

4. Enter the date of the employee’s payment.

5. Enter the amount of the payment.

6. In the Description field, enter a brief note that explains this payment. For example, you might want to enter the employee’s check number.

7. Choose Paid to save the record.

Adjusting or deleting an FMLA premium or payment

Use the FMLA Premiums and Payments window to adjust or delete an FMLA premium or payment. You can adjust an FMLA premium to reflect changes such as increases in the benefit’s premium amount.

To adjust an FMLA premium or payment:

1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)

2. Select an employee ID.

3. Choose the page turn icon button to open the FMLA Premiums and Payments window.

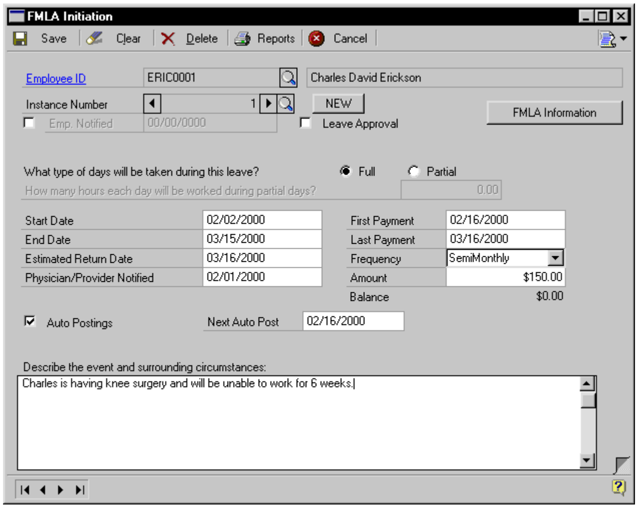
4. Select an entry and choose Edit Line to make the information available to edit.

5. Make changes in the Date and Amount fields as needed.

6. Choose Due or Paid to save the record.

To delete an FMLA premium or payment:

1. Open the FMLA Initiation window.
   (Cards >> Human Resources >> Employee-Benefits >> FMLA/Leaves)



Employee ID: ERIC0001 Charles David Erickson
Instance Number: 1
☐ Emp. Notified: 00/00/0000
☐ Leave Approval

What type of days will be taken during this leave? ● Full ○ Partial
How many hours each day will be worked during partial days? 0.00

Start Date	02/02/2000	First Payment	02/16/2000
End Date	03/15/2000	Last Payment	03/16/2000
Estimated Return Date	03/16/2000	Frequency	SemiMonthly
Physician/Provider Notified	02/01/2000	Amount	$150.00
		Balance	$0.00

☑ Auto Postings
Next Auto Post: 02/16/2000

Describe the event and surrounding circumstances:
Charles is having knee surgery and will be unable to work for 6 weeks.

2. Select an employee ID.

3. Choose the page turn icon button to open the FMLA Premiums and Payments window.

4. Select an entry and choose Delete Line to delete the information.
5. To delete all entries, choose Delete.

Chapter 19: COBRA

COBRA—the Consolidated Omnibus Reconciliation Act of 1985—allows employees to continue their participation in insurance programs offered by the company during unpaid leaves of absence or after separation from the company.

As a result, human resources professionals have three tasks to manage:

- They must inform employees of their rights under the COBRA legislation.
- They must be able to initiate COBRA coverage for those employees who take advantage of this provision.
- They need to track the monthly payments employees will make to continue their continuing coverage.

This information is divided into the following sections:

- *Generating a COBRA rights letter*
- *Initiating COBRA benefits*
- *Tracking a COBRA premium*
- *Tracking a COBRA payment*

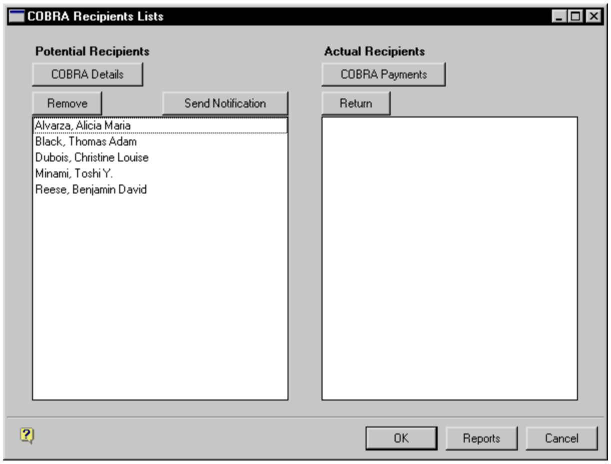
Generating a COBRA rights letter

Use the COBRA Recipients Lists window to generate the letters you need to notify employees of their COBRA rights. Any employee enrolled in a medical benefit is eligible for COBRA benefits.

You'll need to generate COBRA notices for employees who have enrolled in medical benefits or who have made changes to their medical benefits enrollment, such as moving from Single to Family coverage. For more information about COBRA preferences, refer to *Setting up benefit preferences* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

To generate a COBRA rights letter:

1. Open the COBRA Recipients Lists window.
   (Cards >> Human Resources >> Employee-Benefits >> COBRA)


COBRA Recipients Lists
Potential Recipients
COBRA Details
Remove
Send Notification
Actual Recipients
COBRA Payments
Return
OK
Reports
Cancel

Alvarza, Alicia Maria
Black, Thomas Adam
Dubois, Christine Louise
Minami, Toshi Y.
Reese, Benjamin David

2. Select an employee name from the Potential Recipients list.

3. Choose Send Notification to print the notice informing the employee of his or her COBRA rights.

4. Choose Remove to remove employee names from the Potential Recipients list. Choose Return to move employee names from the Actual Recipients list to the Potential Recipients list.

5. Choose OK to save your changes.

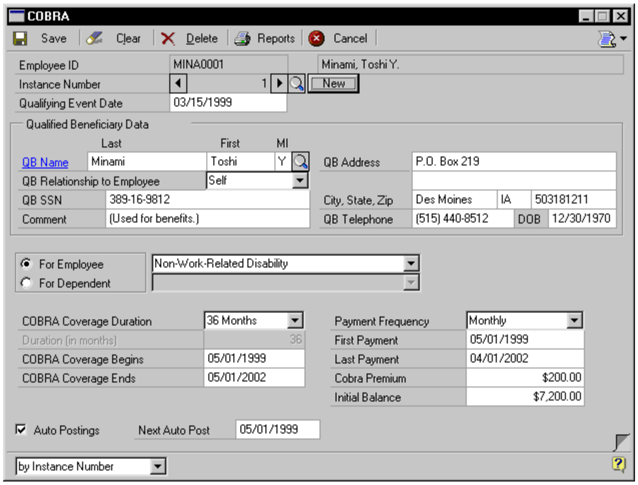
Initiating COBRA benefits

Use the COBRA window to initiate COBRA benefits for an employee or an employee’s dependents. You’ll also enter information about the qualifying event, such as the employee’s termination with your organization in this window.

To initiate COBRA benefits:

1. Open the COBRA Recipients Lists window.
   (Cards >> Human Resources >> Employee-Benefits >> COBRA)

2. Select an employee name and choose COBRA Details to open the COBRA window. The employee will be listed by Employee ID in the COBRA window.



Employee ID: MINA0001 — Minami, Toshi Y.
Instance Number: 1
Qualifying Event Date: 03/15/1999

Qualified Beneficiary Data

QB Name: Last Minami; First Toshi; MI Y
QB Relationship to Employee: Self
QB SSN: 389-16-9812
Comment: (Used for benefits.)
QB Address: P.O. Box 219
City, State, Zip: Des Moines, IA 503181211
QB Telephone: (515) 440-8512
DOB: 12/30/1970

● For Employee: Non-Work-Related Disability
○ For Dependent

COBRA Coverage Duration: 36 Months
Duration (in months): 36
COBRA Coverage Begins: 05/01/1999
COBRA Coverage Ends: 05/01/2002
Payment Frequency: Monthly
First Payment: 05/01/1999
Last Payment: 04/01/2002
Cobra Premium: $200.00
Initial Balance: $7,200.00

☑ Auto Postings
Next Auto Post: 05/01/1999

by Instance Number

3. Choose New to initiate a new instance of COBRA use, or select an existing benefit. You'll be prompted to enter or accept the amount in the COBRA Premium field if the COBRA Premium field in the Health Insurance Setup window has an amount. If the employee is enrolled in multiple health insurance plans, the COBRA Premiums will be added together.

4. Enter the Qualifying Event Date that the employee and his or her dependents are eligible for COBRA coverage.

5. Enter or select a Qualified Beneficiary and enter additional information, if necessary.

6. Mark For Employee if the COBRA benefit is for the employee and select a reason for COBRA coverage. Or, mark For Dependent if the COBRA benefit is for a dependent and select a reason for COBRA coverage.

7. Select the Coverage Duration for the COBRA benefit. If you selected a duration, the system will automatically calculate the end date. If you selected Other for the duration, you must enter an end date. If you select Other, enter the number of months the coverage will last in the Duration field and enter the COBRA start date in the COBRA Coverage Begins field.

8. Select the Payment Frequency and enter the date the first payment is due. The system will use the duration and payment frequency information you entered to calculate the last payment date.

9. Enter the COBRA Premium or accept the default premium amount.

10. Mark Auto Postings to automatically create the payment due schedule.

11. Choose Save. Depending on the Benefit Preferences you selected, a message might appear, giving you the option to post the payment schedule and COBRA ending date to the To-Do List. For more information, refer to *Setting up benefit preferences* in Chapter 7, "Benefit Setup," of the Human Resources Installation and Setup manual.

Tracking a COBRA premium

Use the COBRA Payments and Premiums window to keep accurate records of how much an employee has paid and how much that employee has left to pay for COBRA benefits.

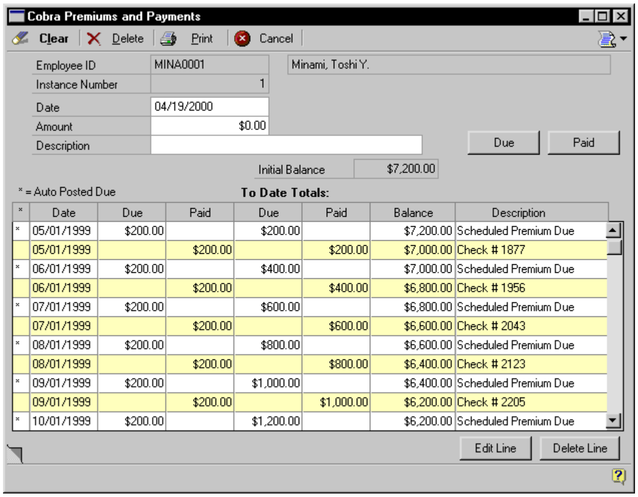
You must first initiate COBRA benefits for an employee before tracking a COBRA premium. For more information, refer to *Initiating COBRA benefits* on page 142.

To track a COBRA premium:

1. Open the COBRA Recipients Lists window.
   (Cards >> Human Resources >> Employee-Benefits >> COBRA)

2. Select an employee name and choose COBRA Details to open the COBRA window. The employee will be listed by Employee ID in the COBRA window.

3. Enter or select an Instance number and choose the page turn icon to open the COBRA Premiums and Payments window.



Employee ID	MINA0001
	Minami, Toshi Y.
Instance Number	1
Date	04/19/2000
Amount	$0.00
Description	
Initial Balance	$7,200.00

* = Auto Posted Due

To Date Totals:

*	Date	Due	Paid	Due	Paid	Balance	Description
*	05/01/1999	$200.00		$200.00		$7,200.00	Scheduled Premium Due
	05/01/1999		$200.00		$200.00	$7,000.00	Check # 1877
*	06/01/1999	$200.00		$400.00		$7,000.00	Scheduled Premium Due
	06/01/1999		$200.00		$400.00	$6,800.00	Check # 1956
*	07/01/1999	$200.00		$600.00		$6,800.00	Scheduled Premium Due
	07/01/1999		$200.00		$600.00	$6,600.00	Check # 2043
*	08/01/1999	$200.00		$800.00		$6,600.00	Scheduled Premium Due
	08/01/1999		$200.00		$800.00	$6,400.00	Check # 2123
*	09/01/1999	$200.00		$1,000.00		$6,400.00	Scheduled Premium Due
	09/01/1999		$200.00		$1,000.00	$6,200.00	Check # 2205
*	10/01/1999	$200.00		$1,200.00		$6,200.00	Scheduled Premium Due

- If you marked Auto Postings in the COBRA window, the posting schedule will be displayed.
- If you didn’t mark Auto Postings, enter the date of the payment.

4. Enter the dollar amount of the premium and enter a description, such as premium due.

5. Choose Due to enter the information in the scrolling window below. You can adjust any information in the scrolling window.

6. When you’ve completed the entries in the COBRA Premium and Payments window, choose the page turn icon to open the COBRA window. The remaining balance will be displayed and will decrease as payments are recorded.

7. Choose Save. Depending on the Benefit Preferences you selected, a message might appear, giving you the option to post the payment schedule and COBRA ending date to the To-Do List. For more information, refer to *Setting up benefit preferences* in Chapter 7, “Benefit Setup,” of the Human Resources manual.

Tracking a COBRA payment

Use the COBRA Payments and Premiums window to keep accurate records of how much an employee has paid and how much that employee has left to pay for COBRA benefits.

You must first initiate COBRA benefits for an employee before tracking a COBRA payment.

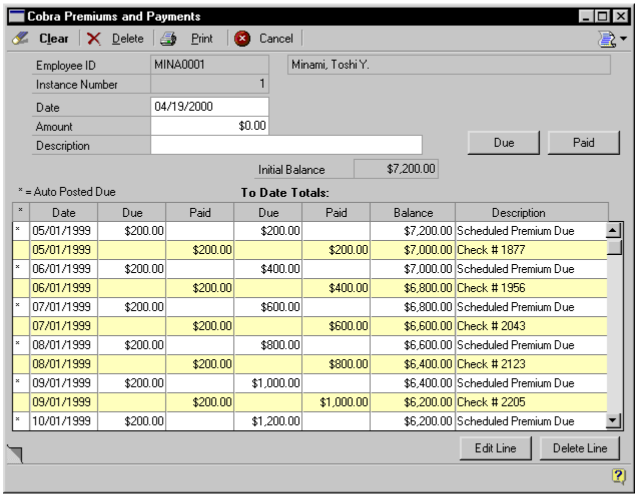
You can post the COBRA payments due to the To Do list. For more information, refer to *Creating a to do list entry* on page 287.

To track a COBRA payment:

1. Open the COBRA Recipients Lists window.
   (Cards >> Human Resources >> Employee-Benefits >> COBRA)

2. Select an employee name and choose COBRA Details to open the COBRA window. The employee will be listed by Employee ID in the COBRA window.

3. Choose the page turn icon to open the COBRA Premiums and Payments window.



Employee ID: MINA0001 — Minami, Toshi Y.
Instance Number: 1
Date: 04/19/2000
Amount: $0.00
Description:
Initial Balance: $7,200.00

* = Auto Posted Due

				To Date Totals:			
*	Date	Due	Paid	Due	Paid	Balance	Description
*	05/01/1999	$200.00		$200.00		$7,200.00	Scheduled Premium Due
	05/01/1999		$200.00		$200.00	$7,000.00	Check # 1877
*	06/01/1999	$200.00		$400.00		$7,000.00	Scheduled Premium Due
	06/01/1999		$200.00		$400.00	$6,800.00	Check # 1956
*	07/01/1999	$200.00		$600.00		$6,800.00	Scheduled Premium Due
	07/01/1999		$200.00		$600.00	$6,600.00	Check # 2043
*	08/01/1999	$200.00		$800.00		$6,600.00	Scheduled Premium Due
	08/01/1999		$200.00		$800.00	$6,400.00	Check # 2123
*	09/01/1999	$200.00		$1,000.00		$6,400.00	Scheduled Premium Due
	09/01/1999		$200.00		$1,000.00	$6,200.00	Check # 2205
*	10/01/1999	$200.00		$1,200.00		$6,200.00	Scheduled Premium Due

4. Enter the date of the payment.

5. Enter the dollar amount of the payment and enter a check number or payment method in the Description field.

6. Choose Paid to enter the information in the scrolling window. The remaining balance will be displayed in the balance column and will decrease as payments are recorded. To adjust information in the scrolling window, select the payment information and choose Edit Line.

7. When you’ve completed the entries in the COBRA Premium and Payments window, choose the page turn icon to open the COBRA window.

8. Choose Save. Depending on the Benefit Preferences you selected, a message might appear, giving you the option to post the payment schedule and COBRA ending date to the To-Do List.

Chapter 20: Benefit Summary and History

Use the Benefits Summary window to view the benefits that are offered to employees and sign them up for benefits. You can also access the Health Insurance Enrollment window, the Life Insurance Enrollment window, the Retirement Plans Enrollment window and the Cash Accounts Enrollment window from the Benefits Summary window.

The Benefit History Lookup window allows you to maintain historical records of changes to benefit plans and enrollments.

This information is divided into the following sections:

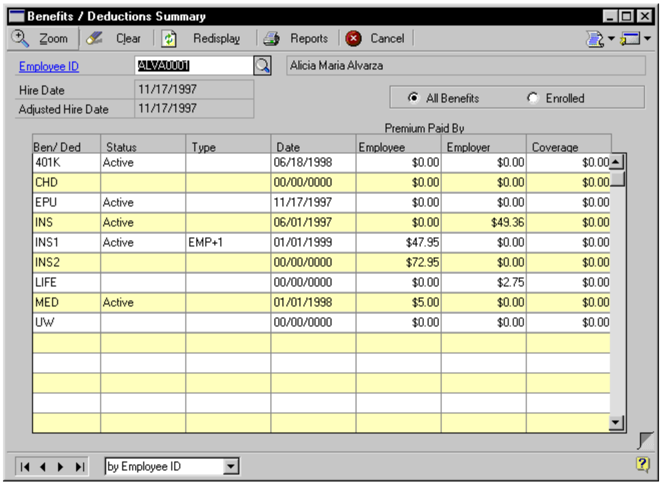
- *Viewing employee benefits and deductions*
- *Creating a benefit history record*
- *Modifying or deleting a benefit history record*
- *Viewing benefit history*

Viewing employee benefits and deductions

Use the Benefits/Deductions Summary window to view employee benefits and deductions. You also can open the benefit enrollment windows and enroll employees from this window.

To view employee benefits and deductions:

1. Open the Benefits/Deductions Summary window. (Cards >> Human Resources >> Employee-Benefits >> Ben/Deduction Summary)



Employee ID: ALVA0001 — Alicia Maria Alvarza

Hire Date: 11/17/1997

Adjusted Hire Date: 11/17/1997

● All Benefits ○ Enrolled

				Premium Paid By		
Ben/ Ded	Status	Type	Date	Employee	Employer	Coverage
401K	Active		06/18/1998	$0.00	$0.00	$0.00
CHD			00/00/0000	$0.00	$0.00	$0.00
EPU	Active		11/17/1997	$0.00	$0.00	$0.00
INS	Active		06/01/1997	$0.00	$49.36	$0.00
INS1	Active	EMP+1	01/01/1999	$47.95	$0.00	$0.00
INS2			00/00/0000	$72.95	$0.00	$0.00
LIFE			00/00/0000	$0.00	$2.75	$0.00
MED	Active		01/01/1998	$5.00	$0.00	$0.00
UW			00/00/0000	$0.00	$0.00	$0.00

by Employee ID

2. Enter or select an employee ID.

3. Mark All Benefits to see the benefits currently defined and available to employees.

4. To make changes, highlight a benefit and choose Zoom. The window that opens will depend on the benefit you selected.

   - If you selected a medical insurance plan, the Health Insurance Enrollment window will open.

   - If you selected a life insurance benefit, the Life Insurance Enrollment window will open.

   - If you selected a retirement plan, the Retirement Plans Enrollment window will open.

   - If you selected a cash account plan, the Cash Accounts Enrollment window will open.

5. To enroll an employee in the benefit, refer to *Enrolling an employee in a health insurance plan* on page 119, *Enrolling an employee in a life insurance plan* on page 121, *Enrolling an employee in a retirement plan* on page 122 or *Enrolling an employee in a cash account* on page 124.

6. Close the Benefits/Deductions Summary window.

Creating a benefit history record

Each time you adjust a benefit record for an employee, a history entry is recorded automatically. However, you can manually re-create history records to show previous benefit activity using the Benefits/Deductions Summary window.

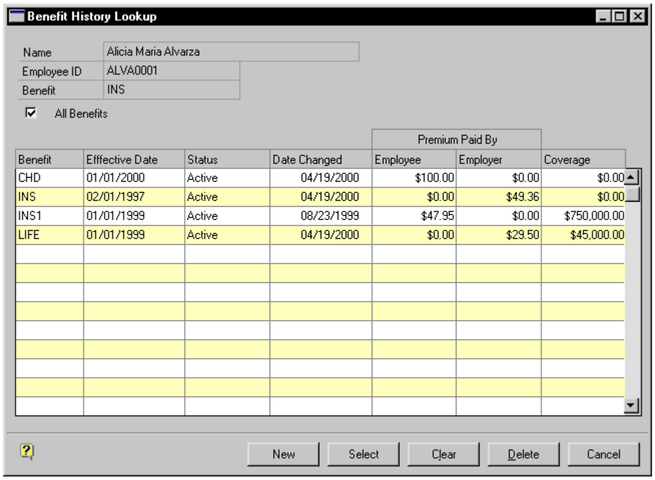
To create a benefit history record:

1. Open the Benefits/Deductions Summary window. (Cards >> Human Resources >> Employee-Benefits >> Ben/Deduction Sum)

2. Enter or select an Employee ID and highlight a benefit or deduction record.

3. Choose Select to open the corresponding enrollment window.

4. Choose the Benefit History Effective Date lookup button to open the Benefit History Lookup window.



Name Alicia Maria Alvarza
Employee ID ALVA0001
Benefit INS
☑ All Benefits

				Premium Paid By		
Benefit	Efffective Date	Status	Date Changed	Employee	Employer	Coverage
CHD	01/01/2000	Active	04/19/2000	$100.00	$0.00	$0.00
INS	02/01/1997	Active	04/19/2000	$0.00	$49.36	$0.00
INS1	01/01/1999	Active	08/23/1999	$47.95	$0.00	$750,000.00
LIFE	01/01/1999	Active	04/19/2000	$0.00	$29.50	$45,000.00

5. To see summaries for all benefit plans, mark All Benefits.

6. Choose New to open the appropriate benefit enrollment window.

7. Enter the information to include in the history record. The Benefit Begins date will be the date used to sort the records in the Benefit History Lookup window.

8. Choose the save icon button.

9. Close the window.

Modifying or deleting a benefit history record

Use the Benefits/Deductions Summary window to modify or delete a benefit history record. You can modify a benefit history record when you need to make changes to an existing record. Delete a benefit history record when you no longer need to track that information.

To modify or delete a benefit history record:

1. Open the Benefits/Deductions Summary window.
   (Cards >> Human Resources >> Employee-Benefits >> Ben/Deduction Sum)

2. Enter or select an Employee ID and select a benefit or deduction record.

3. Choose Select to open the appropriate benefit enrollment window.

4. Choose the Benefit History Effective Date lookup button to open the Benefit History Lookup window.

5. To delete a benefit history record, select the record and choose Delete.

6. To change a benefit history record, select the record and choose Select. The appropriate benefit enrollment window will open. Make your changes and choose the Benefit History save icon button

Viewing benefit history

Use the Benefit History Lookup window to view an employee's enrollment history for a particular benefit.

To view benefit history:

1. Open the Benefits/Deductions Summary window.
   (Cards >> Human Resources >> Employee-Benefits >> Ben/Deduction Sum)

2. Enter or select an Employee ID and select a benefit or deduction record to view.

3. Choose Select to open the appropriate benefit enrollment window.

4. Choose the Benefit History Effective Date lookup button to open the Benefit History Lookup window.

5. To see summaries for all benefit plans, mark All Benefits.

Chapter 21: Total Compensation

To provide a summary of benefits for your employees so they are aware of the value of their benefits, you can use the Total Compensation/Benefits Summary window to generate reports that summarize their entire compensation packages, including pay, insurance and other benefits.

This information is divided into the following sections:

- *Defining a compensation and benefits summary report*
- *Importing payroll data from a spreadsheet*
- *Importing payroll data from a word processing document*
- *Importing information into the Total Compensation / Benefits Summary window*
- *Creating a total compensation/ benefits summary report*
- *Clearing a total compensation/benefits summary definition*

Defining a compensation and benefits summary report

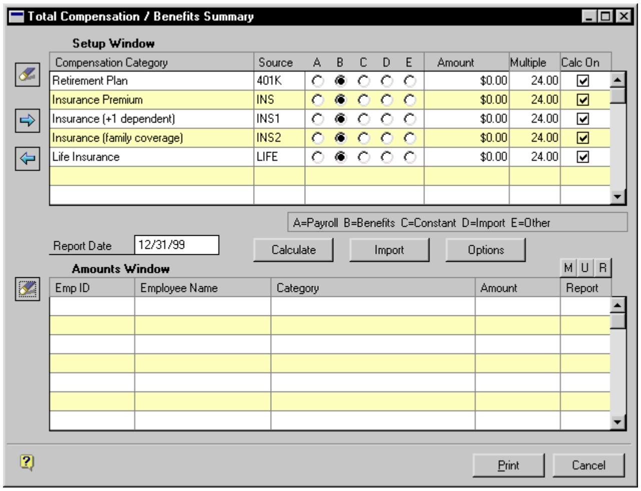
Use the Total Compensation / Benefits Summary window to enter information to include in a total compensation report. A total compensation report can include payroll, benefit and other compensation information.

To define a compensation and benefits summary report:

1. Open the Benefits/Deductions Summary window.
   (Cards >> Human Resources >> Employee - Benefits >> Ben/ Deduction Sum)

2. Enter or select an Employee ID.

3. From the benefits button, choose Total Compensation to open the Total Compensation/Benefits Summary window.


Total Compensation / Benefits Summary
Setup Window
Calculate
Import
Options
Amounts Window
M
U
R
Emp ID
Employee Name
Category
Amount
Report
Print
Cancel

Compensation Category	Source	A	B	C	D	E	Amount	Multiple	Calc On
Retirement Plan	401K	○	●	○	○	○	$0.00	24.00	☑
Insurance Premium	INS	○	●	○	○	○	$0.00	24.00	☑
Insurance (+1 dependent)	INS1	○	●	○	○	○	$0.00	24.00	☑
Insurance (family coverage)	INS2	○	●	○	○	○	$0.00	24.00	☑
Life Insurance	LIFE	○	●	○	○	○	$0.00	24.00	☑

A=Payroll B=Benefits C=Constant D=Import E=Other

Report Date 12/31/99

4. Choose the insert button.

5. Mark a compensation record to include in the benefits summary report.

   - Mark A to import information from Payroll.
   - Mark B to open the Human Resources Benefits window and select a benefit. Benefit information that was entered in the benefit enrollment windows will be displayed.
   - Mark C to enter constant information, such as a bonus or uniform allowance and enter an amount.
   - Mark D to import data from a spreadsheet or word document. For more information, refer to *Importing payroll data from a spreadsheet* on page 157 and *Importing payroll data from a word processing document* on page 158.
   - E is the default entry when you add a line to the scrolling window. Any record marked E will not appear on the total compensation/benefits summary report.

6. Mark Calc On for each compensation category you want to include in your calculations.

7. Repeat Steps 4, 5 and 6 until you've added entries for all the compensation categories you want to include in the compensation summary.

8. To remove a compensation category, select the line and choose the remove button.

9. If you marked D, proceed with *Importing payroll data from a spreadsheet* on page 157 or *Importing payroll data from a word processing document* on page 158.

   Otherwise, proceed with *Creating a total compensation/ benefits summary report* on page 160.

Importing payroll data from a spreadsheet

Payroll information can be imported if the import files are comma-delimited and formatted as described in the following procedure.

To import payroll data from a spreadsheet:

1. Enter the following information in your spreadsheet:

   Line 1 TITLELINE, (with no punctuation) in the first column; then a header with the name of each type of compensation, such as Bonus 1Q, Bonus 2Q, in the next columns.

   Lines 2 and continuing for as many as you need Employee ID number, followed by the corresponding dollar amounts. Dollar amounts must be in the 0.00 format, with no dollar signs or commas, as in 1200.00.

   EXAMPLE:

TITLELINE	Header1	Header2	Header3
CS1100	200.00	500.00	500.00
EN1001	200.00	1100.00	500.00
PROD1600	100.00	1500.00	500.00

2. Save the file with a .csv extension.

3. Import the file. For more information about importing files, see *Importing information into the Total Compensation / Benefits Summary window* on page 159.

Importing payroll data from a word processing document

Payroll information can be imported if the import files are comma-delimited and formatted as described in the following procedure.

To import payroll data from a word processing document:

1. Enter the following information in your word processing document:

   Line 1 TITLELINE, followed by a comma, then the names of each column heading.

   Lines 2 and continuing for as many as you need Employee ID number, followed by a comma, then the respective dollar amounts, separated by commas. Dollar amounts must be in the 0.00 format, with no dollar signs or commas, as in 1200.00. There should be commas between each item, but no spaces.

   EXAMPLE:

   TITLELINE,Header1,Header2,Header3

   CS1100,200,500,500

   EN1001,200,1100,500

   PROD1600,100,1500,500

2. Save the file with a .txt extension.

3. Import the file. For more information about importing the file, see *Importing information into the Total Compensation / Benefits Summary window* on page 159.

Importing information into the Total Compensation / Benefits Summary window

Use the Total Compensation / Benefits Summary window to import information to use in a total compensation/benefits summary report for employees.

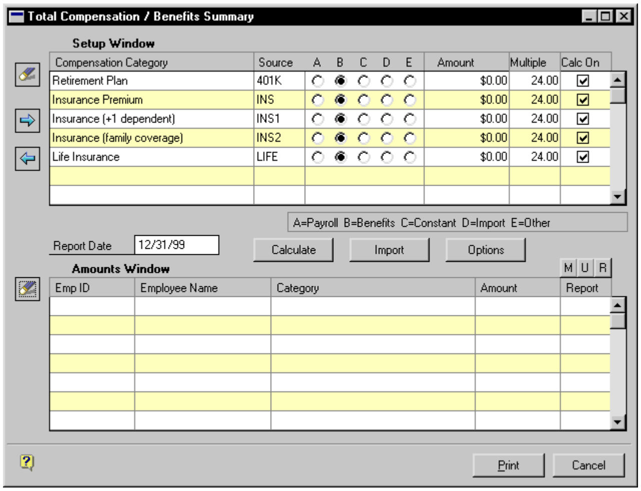
Before you can import information, you must complete *Defining a compensation and benefits summary report* on page 155. If you're going to import payroll data from another program you must also complete *Importing payroll data from a spreadsheet* on page 157 or *Importing payroll data from a word processing document* on page 158.

To import information into the Total Compensation / Benefits Summary window:

1. Open the Benefits/Deductions Summary window.
(Cards >> Human Resources >> Employee - Benefits >> Ben/ Deduction Sum)

2. Enter or select an Employee ID.

3. From the benefit icon button, choose Total Compensation to open the Total Compensation/Benefits Summary window.



Compensation Category	Source	A	B	C	D	E	Amount	Multiple	Calc On
Retirement Plan	401K	○	●	○	○	○	$0.00	24.00	☑
Insurance Premium	INS	○	●	○	○	○	$0.00	24.00	☑
Insurance (+1 dependent)	INS1	○	●	○	○	○	$0.00	24.00	☑
Insurance (family coverage)	INS2	○	●	○	○	○	$0.00	24.00	☑
Life Insurance	LIFE	○	●	○	○	○	$0.00	24.00	☑

A=Payroll B=Benefits C=Constant D=Import E=Other

Report Date 12/31/99

Emp ID	Employee Name	Category	Amount	Report

4. Choose Import to open the Select Import Text File window. Select the file to import and choose OK.

You can import more than one file, however, you can only import one file at a time. All of the information from previous imported files and calculations will remain in the Total Compensation / Benefits Summary window until you clear the report information following Clearing a total compensation/benefits summary definition on page 162.

Creating a total compensation/ benefits summary report

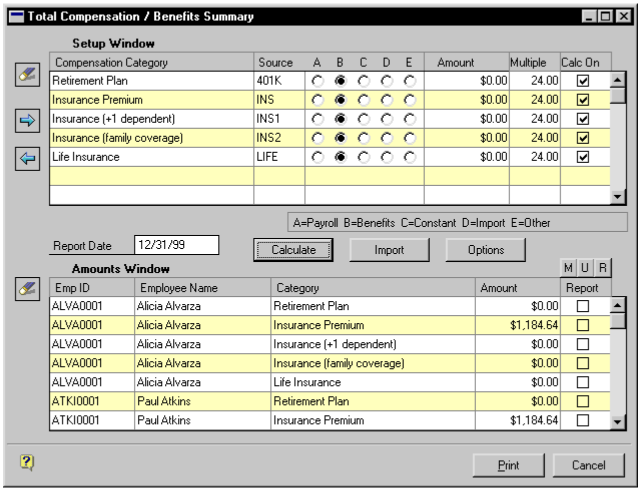
You can use the Total Compensation/Benefits Summary window to define the total compensation/benefits summary report and restrict the employee information included on the report.

To create a total compensation/benefits summary report:

1. Open the Benefits/Deductions Summary window.
   (Cards >> Human Resources >> Employee - Benefits >> Ben/ Deduction Sum)

2. From the benefit icon button, choose Total Compensation to open the Total Compensation/Benefits Summary window.

3. Choose Calculate to display employee records in the scrolling window.


Total Compensation / Benefits Summary
Setup Window
A=Payroll B=Benefits C=Constant D=Import E=Other
Calculate
Import
Options
Amounts Window
M U R
Print
Cancel

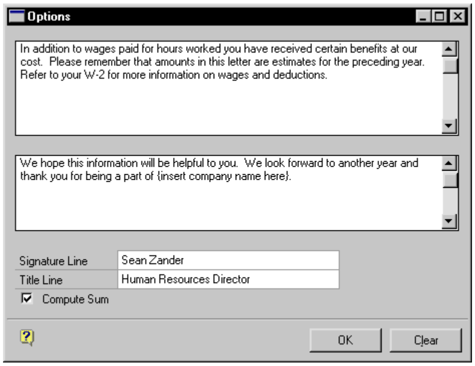
Compensation Category	Source	A	B	C	D	E	Amount	Multiple	Calc On
Retirement Plan	401K	○	●	○	○	○	$0.00	24.00	☑
Insurance Premium	INS	○	●	○	○	○	$0.00	24.00	☑
Insurance (+1 dependent)	INS1	○	●	○	○	○	$0.00	24.00	☑
Insurance (family coverage)	INS2	○	●	○	○	○	$0.00	24.00	☑
Life Insurance	LIFE	○	●	○	○	○	$0.00	24.00	☑

Report Date 12/31/99

Emp ID	Employee Name	Category	Amount	Report
ALVA0001	Alicia Alvarza	Retirement Plan	$0.00	☐
ALVA0001	Alicia Alvarza	Insurance Premium	$1,184.64	☐
ALVA0001	Alicia Alvarza	Insurance (+1 dependent)	$0.00	☐
ALVA0001	Alicia Alvarza	Insurance (family coverage)	$0.00	☐
ALVA0001	Alicia Alvarza	Life Insurance	$0.00	☐
ATKI0001	Paul Atkins	Retirement Plan	$0.00	☐
ATKI0001	Paul Atkins	Insurance Premium	$1,184.64	☐

4. You can change the amounts in the amounts window scrolling window, if necessary, by selecting the information and entering new information.

5. Choose Options to open the Options window.



In addition to wages paid for hours worked you have received certain benefits at our cost. Please remember that amounts in this letter are estimates for the preceding year. Refer to your W-2 for more information on wages and deductions.

We hope this information will be helpful to you. We look forward to another year and thank you for being a part of {insert company name here}.

Signature Line: Sean Zander
Title Line: Human Resources Director
☑ Compute Sum

6. Enter information in the scrolling windows that you want to include in the total compensation/benefits summary report. The text in the top scrolling window will be the paragraph that precedes the benefit summary information; the text in the bottom scrolling window will be in the paragraph that follows the benefit summary information.

7. In the Signature Line and Title Line fields, enter the name and title of the person who will sign the total compensation/benefits summary report.

8. Mark Compute Sum to generate the total value of the employee's benefits.

9. Choose OK to close the Options window.

10. In the Total Compensation/Benefits Summary window, enter the Report Date to be printed on the total compensation/benefits summary report.

11. Mark the records in the Report column to include in the report. Only the marked entries will be included in the reports.

    - Choose the mark all icon button (M) to mark all the records in the Report column.

    - Choose the unmark all icon button (U) to unmark all the records in the Report column.

    - To mark the unmarked records and to unmark those that are already marked, choose the reverse icon button (R).

12. Choose Print to print the BEN_Total_Compensation_Summary report.

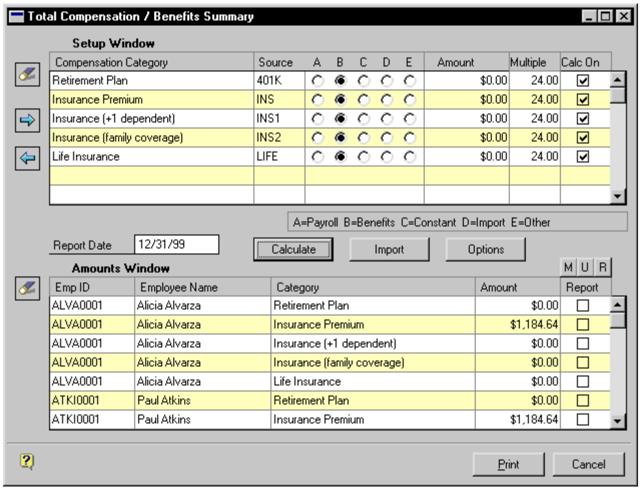
Clearing a total compensation/benefits summary definition

Use the Total Compensation/Benefits Summary window to clera a compensation/benefits summary definition. When you insert total compensation/benefits summary records into the Setup Window scrolling window, they are automatically saved. To define a new report you'll need to clear the existing definition.

To clear a total compensation/benefits summary definition:

1. Open the Benefits/Deductions Summary window. (Cards >> Human Resources >> Employee - Benefits >> Ben/ Deduction Sum)

2. From the benefit icon button, choose Total Compensation to open the Total Compensation/Benefits Summary window.



Setup Window

Compensation Category	Source	A	B	C	D	E	Amount	Multiple	Calc On
Retirement Plan	401K	○	●	○	○	○	$0.00	24.00	☑
Insurance Premium	INS	○	●	○	○	○	$0.00	24.00	☑
Insurance (+1 dependent)	INS1	○	●	○	○	○	$0.00	24.00	☑
Insurance (family coverage)	INS2	○	●	○	○	○	$0.00	24.00	☑
Life Insurance	LIFE	○	●	○	○	○	$0.00	24.00	☑

A=Payroll B=Benefits C=Constant D=Import E=Other

Report Date 12/31/99

Amounts Window

Emp ID	Employee Name	Category	Amount	Report
ALVA0001	Alicia Alvarza	Retirement Plan	$0.00	☐
ALVA0001	Alicia Alvarza	Insurance Premium	$1,184.64	☐
ALVA0001	Alicia Alvarza	Insurance (+1 dependent)	$0.00	☐
ALVA0001	Alicia Alvarza	Insurance (family coverage)	$0.00	☐
ALVA0001	Alicia Alvarza	Life Insurance	$0.00	☐
ATKI0001	Paul Atkins	Retirement Plan	$0.00	☐
ATKI0001	Paul Atkins	Insurance Premium	$1,184.64	☐

3. Choose the clear icon button near the Setup Window scrolling window.

4. A message will appear to ensure you want to clear the Setup window. Choose Clear.

5. Another message will appear to ensure you want to clear the information in the Amounts Window. Choose Clear.

PART 5: EMPLOYEE ASSETS

Part 5: Employee Assets

This part of the documentation describes how to enter employee education, skill and test information, including employees' educational backgrounds, skill proficiencies and test scores.

The following information is discussed:

Chapter 22, "Employee Education," describes how to track information about employees' educational backgrounds, such as schools attended, majors, degrees and grade point averages.

Chapter 23, "Employee Skills and Tests," explains how to enter and view information about an employee's skills and tests.

Chapter 22: Employee Education

Keeping records of an employee’s educational background is important, but it is also very useful when an employee transfers from one position to another. You can enter and store information such as an employee’s school history, work history and references.

If you enter education information about an applicant and use the Hire window to enter hiring information for that applicant, the educational records will be transferred to the Education window.

This information is divided into the following sections:

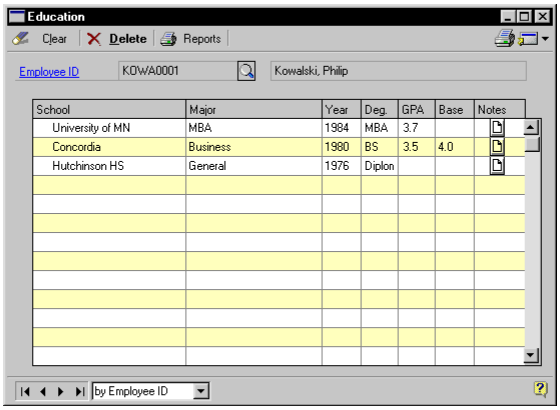
- *Adding an employee education record*
- *Modifying or deleting an employee education record*

Adding an employee education record

Use the Education window to enter and store information about an employee’s educational background, such as schools attended, majors, degrees and grade point averages. When an employee completes additional training courses or attends workshops, you can add that information to this window, also.

To add an employee education record:

1. Open the Education window.
   (Cards >> Human Resources >> Employee >> Education)



Employee ID KOWA0001 Kowalski, Philip

School	Major	Year	Deg.	GPA	Base	Notes
University of MN	MBA	1984	MBA	3.7		🗋
Concordia	Business	1980	BS	3.5	4.0	🗋
Hutchinson HS	General	1976	Diplon			🗋

2. Enter or select an employee ID.

3. Enter the school and major information, including the year graduated, degree obtained, grade point average (GPA) and the GPA base. Use the note button to enter additional information for each entry.

4. Close the window to save your changes.

Modifying or deleting an employee education record

Use the Education window to modify or delete employee education information. You can modify an employee education record to reflect changes such as the completion of a licensure or special certification.

To modify or delete an employee education record:

1. Open the Education window.
   (Cards >> Human Resources >> Employee >> Education)

2. Enter or select an employee ID.

3. Make the changes and close the window to save your changes.

4. To delete an employee education record, select a record. A black dot will appear next to the record you've selected. Choose Delete. You can select and delete any of the information in the window.

Chapter 23: Employee Skills and Tests

Use the Employee Skills window to enter and view information about the skills your employees have. You can query employees' skills and then narrow your search by completing a sub-query. By doing this, you can quickly see which employees are qualified for positions within your company. For more information, refer to *Defining a skill* and *Creating a skill set* in Chapter 9, "Skills, Skill Sets and Tests," of the Human Resources Installation and Setup manual.

Use the Employee Tests window to enter and store information about employee tests, such as the date the tests were taken and test scores. For more information, refer to *Defining a skill* in Chapter 9, "Skills, Skill Sets and Tests," of the Human Resources Installation and Setup manual.

Skill and test records that you enter for applicant windows will be transferred to the corresponding employee windows when you enter employee information using the Hire window.

This information is divided into the following sections:

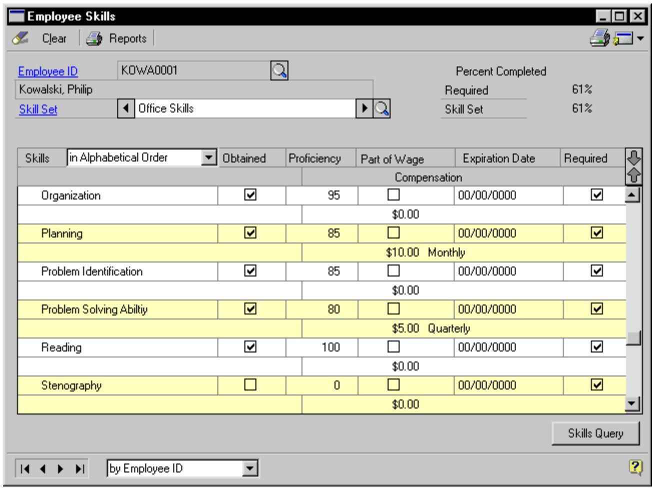
- *Assigning skills to an employee record*
- *Adjusting an employee's skill record*
- *Querying employee skills*
- *Creating an employee skills sub-query*
- *Creating an employee test record*
- *Modifying or deleting an employee test record*

Assigning skills to an employee record

Use the Employee Skills window to record skills and talents that each employee has. Before skills can be assigned to an employee record, they must be part of a skill set.

To assign skills to an employee record:

1. Open the Employee Skills window.
   (Cards >> Human Resources>> Employee >> Skills)



Employee ID: KOWA0001
Kowalski, Philip
Skill Set: Office Skills

Percent Completed
Required: 61%
Skill Set: 61%

Skills in Alphabetical Order	Obtained	Proficiency	Part of Wage	Expiration Date	Required	Compensation
Organization	☑	95	☐	00/00/0000	☑	$0.00
Planning	☑	85	☐	00/00/0000	☑	$10.00 Monthly
Problem Identification	☑	85	☐	00/00/0000	☑	$0.00
Problem Solving Abiltiy	☑	80	☐	00/00/0000	☑	$5.00 Quarterly
Reading	☑	100	☐	00/00/0000	☑	$0.00
Stenography	☐	0	☐	00/00/0000	☑	$0.00

2. Enter or select an employee ID.

3. Enter or select a skill set. Skills that are included in the skill set are displayed in the scrolling window.

4. Mark Obtained for each skill or competency the employee has. Choose the hide and show buttons to enter details in the scrolling window about each skill.

Information entered in the Part of Wage field is for reference only and doesn't affect an employee's salary.

5. Close the window to save your changes.

Adjusting an employee's skill record

Use the Employee Skills window to adjust employee skill information. For example, you can adjust skill information when an employee renews a certification.

To adjust an employee's skill record:

1. Open the Employee Skills window.
   (Cards >> Human Resources>> Employee >> Skills)

2. Enter or select an employee ID.

3. Select a skill set. Skills that are included in the skill set are displayed in the scrolling window.

4. Make changes to the employee skills.

5. Unmark Obtained for each skill the employee hasn't obtained. The skill will remain in the skills list.

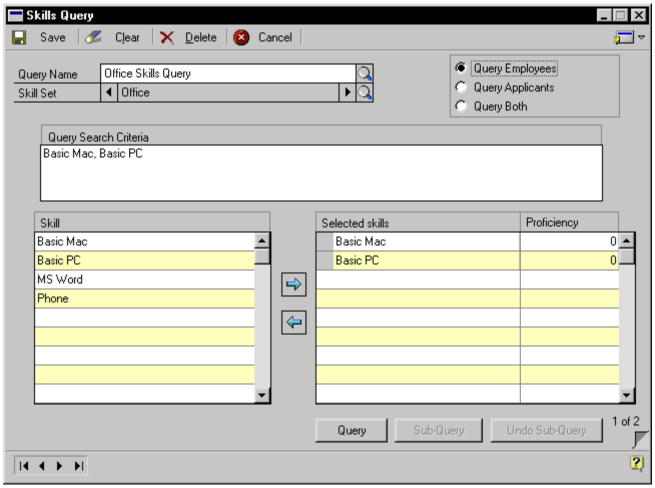
6. Close the window to save your changes.

Querying employee skills

Use the Skills Query window to search for employees that meet certain skills criteria. Each query should include only the employees that have all of the skills in the query.

To query employee skills:

1. Open the Skills Query window.
   (Cards >> Human Resources >> Employee >> Skills >> Skills Query button)
   (Inquiry >> Human Resources >> Skills Query)



Query Name: Office Skills Query
Skill Set: Office

● Query Employees
○ Query Applicants
○ Query Both

Query Search Criteria: Basic Mac, Basic PC

Skill
Basic Mac
Basic PC
MS Word
Phone

Selected skills	Proficiency
Basic Mac	0
Basic PC	0

2. Enter or select a query name.

3. Enter or select a skill set.

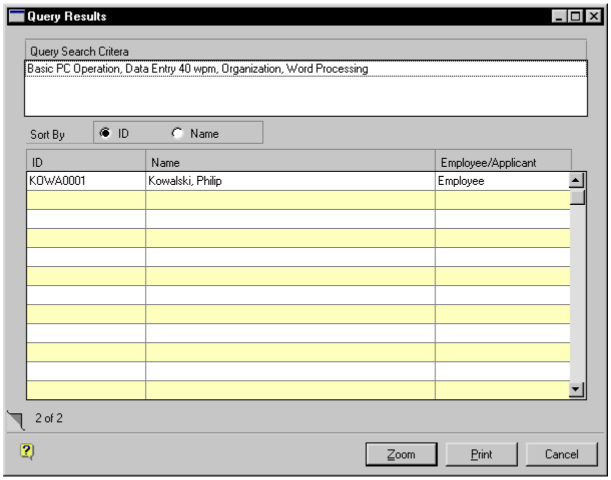
4. Mark Query Employees to search the employee records. To include applicants or both applicants and employees in the query, mark Query Applicants or Query Both.

5. Select a skill and choose the insert icon button to add it to the Selected skills. The skill also will be displayed in the Query Search Criteria window.

6. Enter a minimum proficiency level in the Proficiency column if the applicants are required to have a minimum proficiency at this skill.

7. Choose Query. If the query doesn’t find a match, a message will appear telling you this.

   If one or more matches are found, the Query Results window will open and the names and IDs of the employees, applicants or applicants and employees that match the query will be displayed. You can select one of the records and choose Zoom to open the Employee Maintenance window or Applicant window where you can view more employee or applicant information.



Query Search Critera
Basic PC Operation, Data Entry 40 wpm, Organization, Word Processing

Sort By ● ID ○ Name

ID	Name	Employee/Applicant
KOWA0001	Kowalski, Philip	Employee

2 of 2

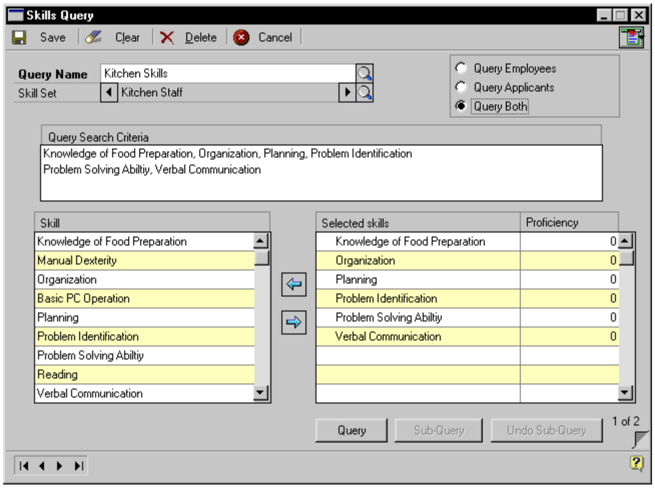
8. Choose Save.

Creating an employee skills sub-query

Once you've completed a query, you can narrow the list of applicants and employees who have a specific skill by completing a sub-query. Use the Skills Query window to create a skills sub-query.

To create an employee skills sub-query:

1. Open the Skills Query window.
   (Cards >> Human Resources >> Employee >> Skills >> Skills Query)



Query Name Kitchen Skills
Skill Set Kitchen Staff

○ Query Employees
○ Query Applicants
● Query Both

Query Search Criteria
Knowledge of Food Preparation, Organization, Planning, Problem Identification
Problem Solving Abiltiy, Verbal Communication

Skill
Knowledge of Food Preparation
Manual Dexterity
Organization
Basic PC Operation
Planning
Problem Identification
Problem Solving Abiltiy
Reading
Verbal Communication

Selected skills	Proficiency
Knowledge of Food Preparation	0
Organization	0
Planning	0
Problem Identification	0
Problem Solving Abiltiy	0
Verbal Communication	0

2. Complete a query as described in *Querying employee skills*.

3. In the Skills Query window, choose Sub-Query. The skills from the first query will be displayed in the Query Search Criteria window.

4. Select a skill set that contains the skills you want to query.

5. Highlight a skill and choose the insert icon button to add it to the selected skills list. You also can add minimum proficiencies.

6. Choose Query. If the query doesn’t find a match, a message will appear telling you this.

   If one or more matches are found, the Query Results window will open and the names and IDs of the employees, applicants or applicants and employees that match the query will be displayed. You can select one of the records and choose Zoom to open the Employee Maintenance window or Applicant window to view more employee or applicant information.

7. Choose Save.

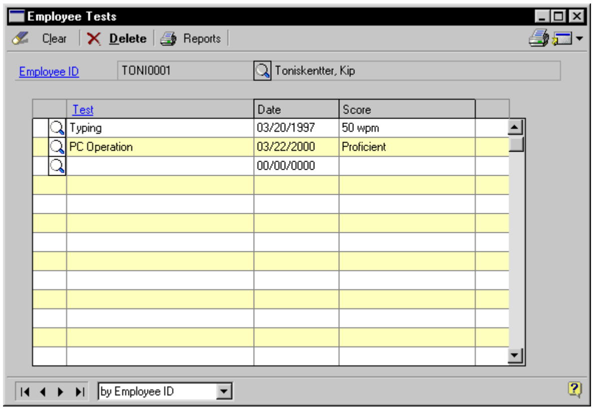
You can complete several sub-queries to narrow the list of employees and applicants. Choose Undo Sub-Query to remove a sub-query's results.

Creating an employee test record

Use the Employee Tests window to enter employee test information. Test records that you enter for applicants will be transferred to the corresponding employee windows when you enter employee information using the Hire window.

To create an employee test record:

1. Open the Employee Tests window.
   (Cards >> Human Resources >> Employee >> Tests)



Employee ID TONI0001 Toniskentter, Kip

Test	Date	Score
Typing	03/20/1997	50 wpm
PC Operation	03/22/2000	Proficient
	00/00/0000	

2. Enter or select an employee ID.

3. Choose the lookup button in the first column to select a test the employee has taken.

4. Enter the date the test was administered.

5. Enter the employee's score. You also can enter the total possible score, such as "95 of 100."

6. Choose the note button to add comments about the test.

7. Close the window.

Modifying or deleting an employee test record

Use the Employee Tests window to modify or delete test information, such as when an employee retakes a test.

To modify or delete an employee test record:

1. Open the Employee Tests window.
   (Cards >> Human Resources >> Employee >> Tests)

2. Enter or select an employee ID.

3. Make your changes to the record in the scrolling window.

4. To delete an employee test record, choose Delete. You'll have the option to delete one item or all items.

PART 6: EMPLOYEE DEVELOPMENT

Part 6: Employee Development

This part of the documentation describes how to enter employee orientation and training information.

The following information is discussed:

Chapter 24, “Employee Orientation,” explains how to use orientation checklists to be sure new employees are introduced to your organization’s policies and procedures.

Chapter 25, “Employee Training,” describes how to track employee training information, such as which employees have completed classes, or which employees are currently enrolled in classes.

Chapter 24: Employee Orientation

An orientation program gives a new employee an opportunity to learn about your organization and makes the transition into a new position smoother for the employee.

Use the Orientation Checklist window to help you be sure new employees are introduced to your organization's policies and procedures. You can use the default orientation checklists included with your Human Resources program, or you can modify the checklists to suit your company's specific needs. For more information about creating an orientation checklist, refer to *Setting up an orientation checklist using default options* and *Setting up an orientation checklist* in Chapter 10, "Orientation and Termination Checklists," of the Human Resources Installation and Setup manual.

This information is divided into the following sections:

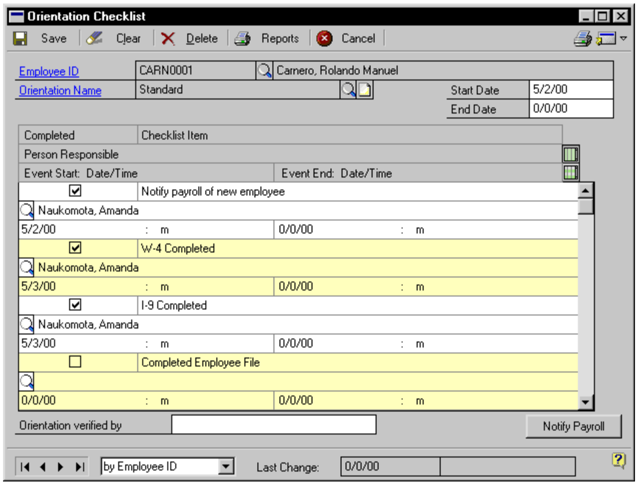
- *Adding an employee orientation record*
- *Modifying or deleting an employee orientation record*
- *Completing an employee's orientation*

Adding an employee orientation record

Use the Orientation Checklist window to add an employee orientation record when you begin the orientation process for an employee. Print the Orientation Payroll Notification report for a list of the employee's pay codes and pay rates.

To add an employee orientation record:

1. Open the Orientation Checklist window.
   (Cards >> Human Resources >> Employee >> Orientation)



Employee ID: CARN0001 — Carnero, Rolando Manuel
Orientation Name: Standard
Start Date: 5/2/00
End Date: 0/0/00

Completed	Checklist Item	Person Responsible	Event Start: Date/Time	Event End: Date/Time
☑	Notify payroll of new employee	Naukomota, Amanda	5/2/00 : m	0/0/00 : m
☑	W-4 Completed	Naukomota, Amanda	5/3/00 : m	0/0/00 : m
☑	I-9 Completed	Naukomota, Amanda	5/3/00 : m	0/0/00 : m
☐	Completed Employee File		0/0/00 : m	0/0/00 : m

Orientation verified by:
by Employee ID
Last Change: 0/0/00

2. Enter or select an employee ID.

3. Select an orientation name and enter a start date or accept the default date.

4. Expand the scrolling window using the hide and show buttons. Enter or select the person responsible and the start date and time for each checklist item.

5. When you complete an item, mark Completed for the item.

6. Choose Notify Payroll to print the Orientation Notify Payroll report for this employee.

7. Choose Save.

Modifying or deleting an employee orientation record

Use the Orientation Checklist window to modify or delete an employee orientation record. You can modify the employee's orientation checklist to reflect changes such as when orientation items are completed.

To modify or delete an employee orientation record:

1. Open the Orientation Checklist window.
   (Cards >> Human Resources >> Employee >> Orientation)
2. Enter or select an employee ID and select an orientation name.
3. Make your changes to the orientation checklist items and choose Save.
4. To delete an employee orientation record, choose Delete.

Completing an employee's orientation

Use the Orientation Checklist window to complete the orientation process for an employee. The orientation checklist is complete when all of the checklist items are marked.

To complete an employee's orientation:

1. Open the Orientation Checklist window.
   (Cards >> Human Resources >> Employee >> Orientation)
2. Enter or select an employee ID.
3. Select an orientation name and enter the date the employee's orientation was completed in the End Date field.
4. Expand the scrolling window and enter the date and time for each checklist item.
5. Enter the name of the person verifying the completion of the orientation process.
6. Choose Save.

Chapter 25: Employee Training

To help your employees improve their skills and acquire new skills, your company will probably offer a variety of classes. Classes can be one-time classes or part of a more comprehensive course. For instance, your company might offer a cardiopulmonary resuscitation (CPR) class and an injury class as parts of a first aid course. Or, your company might offer a course on the telephone system with different times for each class. For more information about creating courses and classes, refer to *Setting up a training course* and *Setting up a training class* in Chapter 10, "Training Classes and Courses," of the Human Resources Installation and Setup manual.

After defining training courses and classes and adding employee names to class lists, you can track training information, such as which employees have completed classes, or which employees are currently enrolled in classes. You can link skills to class definitions to update employee skill records when an employee completes a class. For more information about linking skills to classes, refer to *Linking skills to a training class* in Chapter 10, "Training Classes and Courses," of the Human Resources Installation and Setup manual.

You also can track which employees have completed required classes and you can link classes or courses to positions by marking those required for each position within your organization. For more information about linking classes or courses to positions, refer to *Linking courses to a position code* and *Linking classes to a position code* in Chapter 5, "Organizational Structure," of the Human Resources Installation and Setup manual.

This information is divided into the following sections:

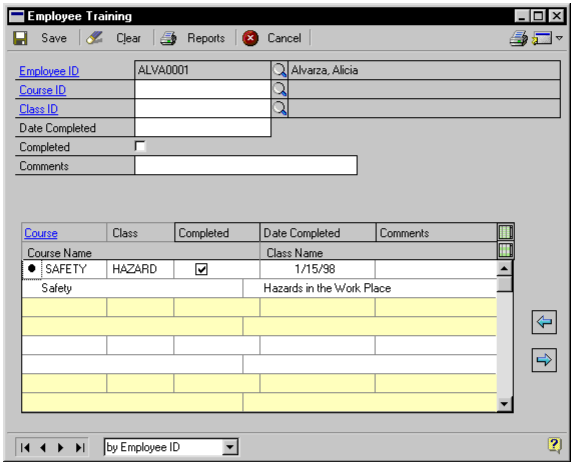
- *Adding employee names to a training class list*
- *Removing employee names from a training class list*
- *Adding a group of employee names to a training class list*
- *Removing a group of employee names from a training class list*
- *Completing an employee training class*
- *Viewing class enrollment*

Adding employee names to a training class list

Use the Employee Training window to add employee names individually to training class lists. To add a group of employee names to a training class list, refer to *Adding a group of employee names to a training class list* on page 185.

To add employee names to a training class list:

1. Open the Employee Training window.
(Cards >> Human Resources >> Employee >> Training)



Employee ID	ALVA0001	Alvarza, Alicia
Course ID		
Class ID		
Date Completed		
Completed	☐	
Comments		

Course	Class	Completed	Date Completed	Comments
Course Name			Class Name	
SAFETY	HAZARD	☑	1/15/98	
Safety			Hazards in the Work Place	

by Employee ID

2. Enter or select an employee ID.

3. Enter or select a course and class ID and enter comments.

4. Choose the insert icon button to save your changes.

5. Close the window.

Removing employee names from a training class list

Use the Employee Training window to remove employee names individually from training class lists. To remove a group of employee names to a training class list, refer to *Removing a group of employee names from a training class list* on page 187.

To remove employee names from a training class list:

1. Open the Employee Training window.
   (Cards >> Human Resources >> Employee >> Training)

2. Enter or select an employee ID.

3. Enter or select a course and class ID.

4. To remove an employee name from the training class list, highlight the course or class record from the scrolling window and choose the remove icon button.

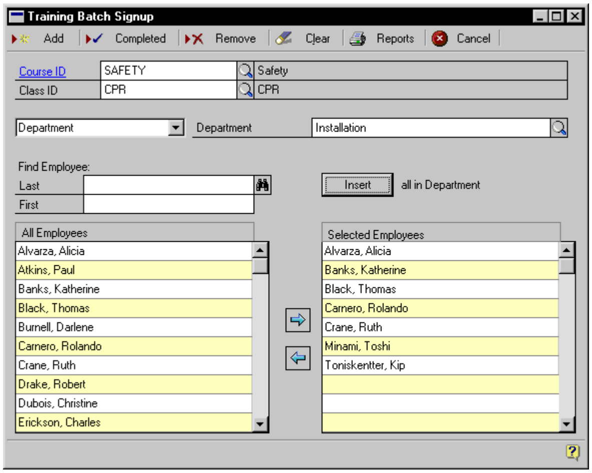
5. Close the window.

Adding a group of employee names to a training class list

Use the Training Batch Signup window to add groups of employee names to a training class list. For example, you could enroll all the names of clerical employees in a class on a new company mailing policy. Enrolling employee names in batches will save you time by allowing you to enroll them by division, department or position.

To add a group of employee names to a training class list:

1. Open the Training Batch Signup window.
   (Setup >> Human Resources >> Training >> Training Batch Signup button)



Course ID: SAFETY — Safety
Class ID: CPR — CPR

Department — Department: Installation

All Employees	Selected Employees
Alvarza, Alicia	Alvarza, Alicia
Atkins, Paul	Banks, Katherine
Banks, Katherine	Black, Thomas
Black, Thomas	Carnero, Rolando
Burnell, Darlene	Crane, Ruth
Carnero, Rolando	Minami, Toshi
Crane, Ruth	Toniskentter, Kip
Drake, Robert	
Dubois, Christine	
Erickson, Charles	

2. Enter or select a course ID and class ID.

3. Select a group of employee names to add to the class.

   If you selected Division, Department or Position, an additional field will appear. Select the Division, Department or Position that includes the employee names you want to add or remove.

4. Choose Insert to select all employee names from that organizational group.

5. Choose Add to add employees to the training class list.

6. Choose Completed to mark the class as completed in the Employee Training window for the selected employees and enter the completion date.

7. Close the window.

Removing a group of employee names from a training class list

Use the Training Batch Signup window to remove groups of employee names to a training class list. Remove employee names in batches will save you time by allowing you to unenroll them by division, department or position.

To remove a group of employee names to a training class list:

1. Open the Training Batch Signup window.
   (Setup >> Human Resources >> Training >> Training Batch Signup button)

2. Enter or select a course ID and class ID.

3. Select a group of employee names to remove from the class.

   If you selected Division, Department or Position, an additional field will appear. Select the Division, Department or Position that includes the employee names you want to add or remove.

4. To remove an employee name from the training class list, highlight the employee name and choose the remove icon button.

5. Choose Remove to remove employees from the training class list.

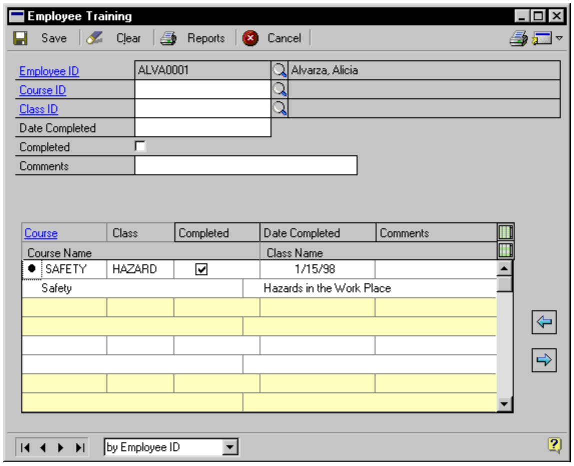
6. Close the window.

Completing an employee training class

Use the Employee Training window to update records for an employee training class. If the employee name was added to a training class list, the course and class ID will be displayed in the scrolling window.

To complete an employee training class:

1. Open the Employee Training window.
   (Cards >> Human Resources >> Employee >> Training)



Employee ID: ALVA0001 Alvarza, Alicia
Course ID:
Class ID:
Date Completed:
Completed: ☐
Comments:

Course	Class	Completed	Date Completed	Comments
Course Name			Class Name	
SAFETY	HAZARD	☑	1/15/98	
Safety			Hazards in the Work Place	

by Employee ID

2. Enter or select an employee ID.

3. If the employee name wasn’t added to a training class list, enter or select a course and class ID and choose the insert icon button. Mark Completed, enter the date completed and enter any comments.

4. Choose the insert icon button to save your changes or choose Save.

5. If the employee name was added to a training class list, enter the date completed, mark Completed and enter any comments.

6. Close the window.

Viewing class enrollment

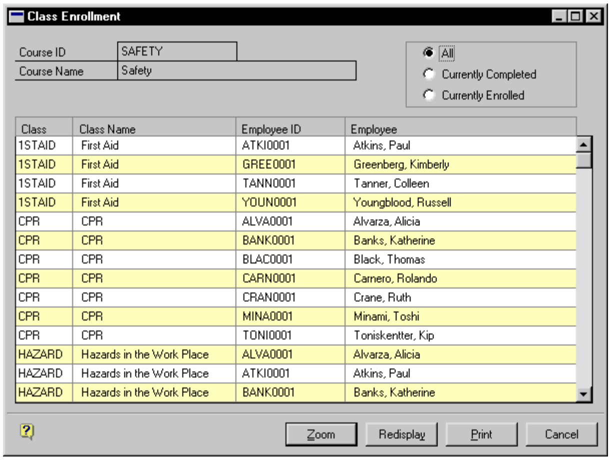
Use the Class Enrollment window to view the employees enrolled for all classes in a course. You also can see which employees have completed classes in that course.

To view class enrollment:

1. Open the Training Course and Class Definition window. (Setup >> Human Resources >> Training)

2. Enter or select a course ID.

3. Choose Class Enrollment to open the Class Enrollment window.



Course ID SAFETY
Course Name Safety

● All
○ Currently Completed
○ Currently Enrolled

Class	Class Name	Employee ID	Employee
1STAID	First Aid	ATKI0001	Atkins, Paul
1STAID	First Aid	GREE0001	Greenberg, Kimberly
1STAID	First Aid	TANN0001	Tanner, Colleen
1STAID	First Aid	YOUN0001	Youngblood, Russell
CPR	CPR	ALVA0001	Alvarza, Alicia
CPR	CPR	BANK0001	Banks, Katherine
CPR	CPR	BLAC0001	Black, Thomas
CPR	CPR	CARN0001	Carnero, Rolando
CPR	CPR	CRAN0001	Crane, Ruth
CPR	CPR	MINA0001	Minami, Toshi
CPR	CPR	TONI0001	Toniskentter, Kip
HAZARD	Hazards in the Work Place	ALVA0001	Alvarza, Alicia
HAZARD	Hazards in the Work Place	ATKI0001	Atkins, Paul
HAZARD	Hazards in the Work Place	BANK0001	Banks, Katherine

4. Mark All to view all classes for this course. To view classes that employees have completed, mark Currently Completed. To view employee enrollment in classes for this course, mark Currently Enrolled.

PART 7: EMPLOYEE PERFORMANCE

Part 7: Employee Performance

This part of the documentation describes how to enter employee discipline, grievance, review and injury information.

The following information is discussed:

Chapter 26, "Employee Discipline," explains how to record and track disciplinary actions within your company, such as employee problems and follow-up information about problems—even if the resolution requires several steps or stages.

Chapter 27, "Employee Grievances," describes how to track employee grievances and follow them through many stages, if necessary.

Chapter 28, "Employee Reviews," describes how to enter and store review information for your organization's employees, including review categories such as quality of work, attendance and communication skills, as well as scores for those categories.

Chapter 29, "Employee Injury/Illness," explains how to enter detailed information about job-related injuries and illnesses and to generate standard Occupational Safety and Health Administration (OSHA) reports and logs.

Chapter 26: Employee Discipline

You can record and track disciplinary actions within your company using the Discipline Entry window. You can record employee problems and follow-up information about problems—even if the resolution requires several steps or stages. You also will use the Discipline Entry window to document incidents, record and track significant dates and include comments about the incidents.

Because disciplinary actions for a single incident can involve more than one stage, you can enter many stages for each disciplinary action. You can use the default disciplinary stages included with your Human Resources program, or you can create stages to suit your company's specific needs.

Human Resources includes a points system that you can use to monitor discipline and performance. You can use the points system to track increases or decreases in an employee's points. Points can be positive or negative, depending on your company's points system. For example, some organizations use points as a reward system, increasing points for good attendance and quality work, and decreasing points for excessive absences and other problems.

This information is divided into the following sections:

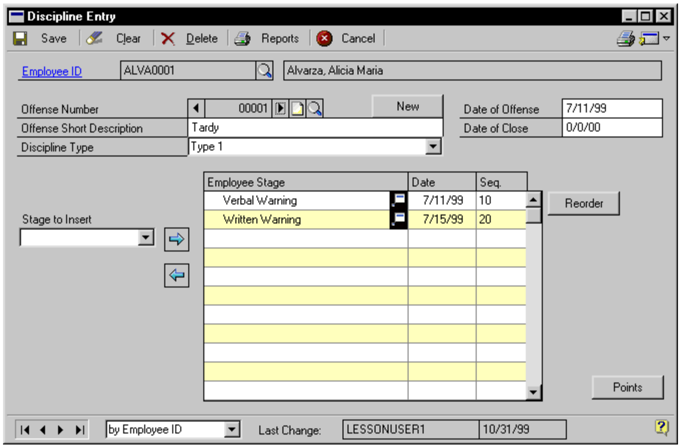
- *Adding an employee discipline record*
- *Modifying an employee discipline record*
- *Closing or deleting an employee discipline record*
- *Adjusting or deleting employee discipline points*

Adding an employee discipline record

Use the Discipline Entry window to manage your employee discipline records. You can add an employee discipline record, track the type of disciplinary action taken, modify the record, and add notes or comments to the record. If you use a points system, you can award or decrease points for each employee. When a discipline record no longer needs to be active, you can close it. You can also delete discipline records.

To add an employee discipline record:

1. Open the Discipline Entry window.
   (Cards >> Human Resources >> Employee >> Discipline)



Employee ID: ALVA0001 Alvarza, Alicia Maria

Offense Number: 00001

Offense Short Description: Tardy

Discipline Type: Type 1

Date of Offense: 7/11/99

Date of Close: 0/0/00

Employee Stage	Date	Seq.
Verbal Warning	7/11/99	10
Written Warning	7/15/99	20

by Employee ID

Last Change: LESSONUSER1 10/31/99

2. Enter or select an employee ID and choose New to create a new offense number.

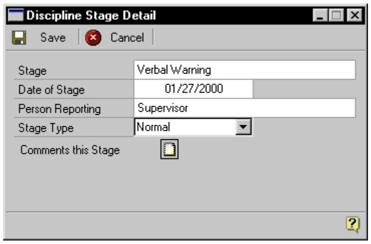
3. Choose the Offense Number note button to enter information about the offense.

4. Enter the date of the offense, a short description of the offense and enter or select a discipline type.

5. Enter or select a stage of disciplinary action and choose the insert icon button.

6. Enter the date in the scrolling window that the disciplinary action was administered.

7. Choose the expansion button in the scrolling window to open the Discipline Stage Detail window. Use this window to enter additional information about the disciplinary action, such as the person reporting the offense and the type of disciplinary stage. Choose the notes button to add additional comments.



Stage: Verbal Warning
Date of Stage: 01/27/2000
Person Reporting: Supervisor
Stage Type: Normal
Comments this Stage

If you select Suspension or Termination in the Discipline Stage Detail window, additional date fields will appear.

8. Choose Save. The Discipline Entry window will be displayed.

9. Choose Save.

Modifying an employee discipline record

Use the Discipline Entry window to modify an employee discipline record. You can change the order of the discipline stages, add stages and modify or add notes.

To modify an employee discipline record:

1. Open the Discipline Entry window.
   (Cards >> Human Resources >> Employee >> Discipline)

2. Enter or select an employee ID and offense number.

3. Make your changes.

4. To reorder discipline stages, adjust the sequence number. To move a stage up, change the sequence number to a smaller unique number. To move a stage down, change the sequence number to a larger unique number. Choose Reorder.

5. Choose Save.

Closing or deleting an employee discipline record

Use the Discipline Entry window to close or delete a discipline record. You can delete an action from a discipline record or an entire incident.

To close or delete an employee discipline record:

1. Open the Discipline Entry window.
   (Cards >> Human Resources >> Employee >> Discipline)

2. Enter or select an employee ID and offense number.

3. To close an offense, enter a date in the Date of Close field.

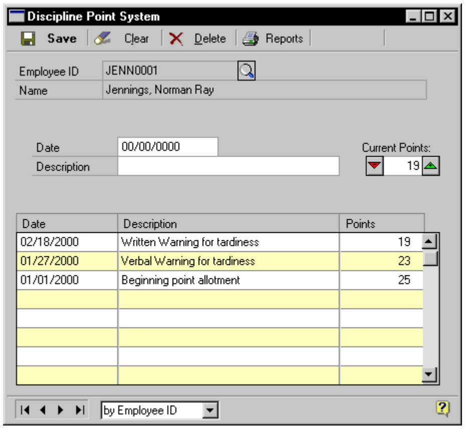
4. To delete an offense, choose Delete.

Adjusting or deleting employee discipline points

Use the Discipline Point System window to award discipline points and track each employee's point total. You also can use this window to adjust discipline points or delete the discipline points record.

To adjust or delete employee discipline points:

1. Open the Discipline Point System window.
   (Cards >> Human Resources >> Employee >> Discipline >> Points button)



Employee ID JENN0001
Name Jennings, Norman Ray
Date 00/00/0000
Description
Current Points: 19

Date	Description	Points
02/18/2000	Written Warning for tardiness	19
01/27/2000	Verbal Warning for tardiness	23
01/01/2000	Beginning point allotment	25

2. Enter or select an employee ID.

3. Enter the date the points were increased or decreased and a description.

4. Adjust the number of points for the employee and choose Save.

5. To remove points for one incident, decrease the points to zero. To delete all of an employee’s discipline points records, choose Delete.

Chapter 27: Employee Grievances

Many companies have an employee grievance—or problem resolution—process. You can track grievances by stages to be sure the proper steps are taken to address an employee's grievance.

Use the Grievances window to track employee grievances and follow them through many stages, if necessary. For instance, the first stage in the grievance process might be to discuss the problem with the employee's supervisor. The second stage might be to discuss the problem with the supervisor's manager.

This information is divided into the following sections:

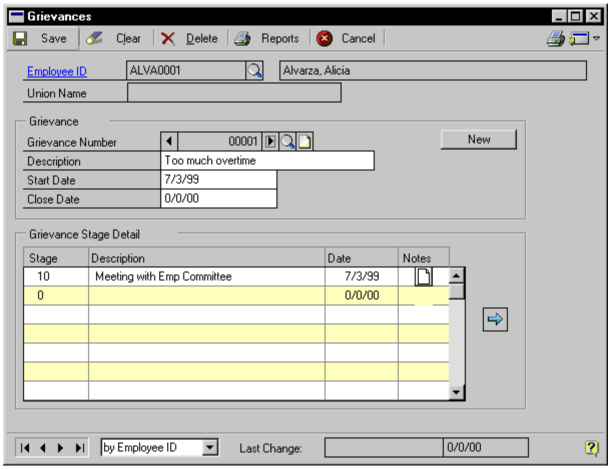
- *Adding an employee grievance record*
- *Modifying an employee grievance record*
- *Deleting an employee grievance record*

Adding an employee grievance record

Use the Grievance window to enter grievance information such as a description of the grievance and the date the grievance was filed. You also can add multiple grievance stages.

To add an employee grievance record:

1. Open the Grievances window.
(Cards >> Human Resources >> Employee >> Grievances)



Employee ID: ALVA0001 Alvarza, Alicia
Union Name:

Grievance Number: 00001
Description: Too much overtime
Start Date: 7/3/99
Close Date: 0/0/00

Stage	Description	Date	Notes
10	Meeting with Emp Committee	7/3/99	
0		0/0/00	

by Employee ID
Last Change: 0/0/00

2. Enter or select an employee ID.

3. Choose New to add a new grievance number.

   Grievances are numbered on an incremental basis. For instance, if Employee A has filed a grievance, it will be Grievance 1, the next employee to file a grievance will file Grievance 2.

4. You can choose the note button next to the Grievance Number to enter details about the grievance.

5. Enter a short description of the grievance.

6. In the Start Date field, enter the date the grievance was first registered.

   When you close the grievance, enter the close date in the Close Date field.

7. You can enter additional information in the Grievance Stage Detail scrolling window.

8. Choose Save.

Modifying an employee grievance record

Use the Grievances window to modify a grievance record. Because actions for a single grievance can involve several stages, you might need to add information to the grievance record. You can make changes to an existing grievance record, add a grievance stage to an employee record and delete grievance stages from an employee grievance record.

To modify an employee grievance record:

1. Open the Grievances window.
   (Cards >> Human Resources >> Employee >> Grievances)

2. Enter or select an employee ID and grievance number.

3. Make your changes.

4. To add a stage to a grievance number, enter the grievance stage detail information.

5. To delete a grievance stage, highlight the stage to delete and choose the remove icon button

6. Choose Save.

Deleting an employee grievance record

Use the Grievance window to delete a grievance record. To delete a stage from a grievance record, refer to *Modifying an employee grievance record* on page 201.

To delete an employee grievance record:

1. Open the Grievances window.
   (Cards >> Human Resources >> Employee >> Grievances)

2. Enter or select an employee ID and grievance number.

3. Choose Delete.

Chapter 28: Employee Reviews

Use the Employee Review window to enter and store employee review information and include review categories such as quality of work and attendance, as well as scores for those categories. You also can track additional review information, such as wage adjustment suggestions, plans for improvement and the date of next review.

You can use the Employee Review window to review the progress of individual employees or employee teams. Employee review information gives supervisors and employees a good basis for discussing goals and problems. Tracking employee progress can help to determine wage adjustments.

Employee reviews can be scored using numbers or word sets. You can create your own word sets or use the default word sets. If you score employee reviews using numbers, you can apply a weight factor to each review category and create a review range from 0 to 99. You can enter a category score for each review category to evaluate an employee's performance. Scores will be multiplied by category weights to generate weighted scores.

For more information about defining review categories, word sets and review ranges, refer to *Setting up a review policy based on numbers*, *Setting up a review policy based on word sets* and *Defining a word set for employee reviews* in Chapter 12, "Employee Review Setup," of the Human Resources Installation and Setup manual.

This information is divided into the following sections:

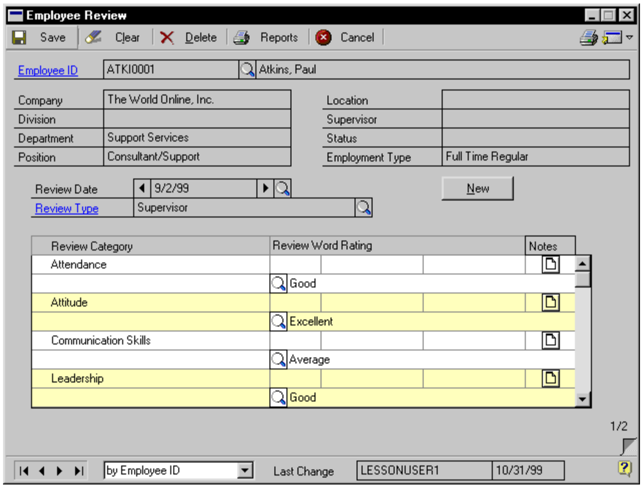
- *Adding an employee review record*
- *Entering additional employee review information*
- *Scoring employee reviews using numbers*
- *Modifying or deleting an employee review record*

Adding an employee review record

Use the Employee Review window to add employee review information, such as the review date and review scores. To create a review form, refer to *Setting up a review policy based on numbers* and *Setting up a review policy based on word sets* in Chapter 12, "Employee Review Setup," of the Human Resources Installation and Setup manual.

To add an employee review record:

1. Open the Employee Review window.
   (Cards >> Human Resources >> Employee >> Reviews)



Employee ID: ATKI0001 Atkins, Paul

Company	The World Online, Inc.	Location	
Division		Supervisor	
Department	Support Services	Status	
Position	Consultant/Support	Employment Type	Full Time Regular

Review Date: 9/2/99
Review Type: Supervisor

Review Category	Review Word Rating	Notes
Attendance	Good	
Attitude	Excellent	
Communication Skills	Average	
Leadership	Good	

1/2

by Employee ID
Last Change: LESSONUSER1 10/31/99

2. Enter or select an employee ID.

3. Choose New. The Date Lookup window will open.

4. Choose the employee’s review date and select the review type.

   The review type will be displayed if you’ve linked a review type to the employee’s position in the Position Setup window. For more information about linking review types to position codes, refer to *Setting up a position code* in Chapter 5, “Organizational Structure,” of the Human Resources Installation and Setup manual.

5. Enter the score for each review category. If you’re using a review system based on numbers, enter the number or score. If you’re using a review system based on word sets, use the Review Word Rating lookup button to select a word. For more information about scoring reviews using numbers, refer to *Scoring employee reviews using numbers* on page 206.

To modify or add to the word set from the Review Word Lookup window, choose the zoom icon button. You can create new word sets or add to existing word sets.

6. You can enter additional notes about any of the review categories.

7. Choose Save.

Entering additional employee review information

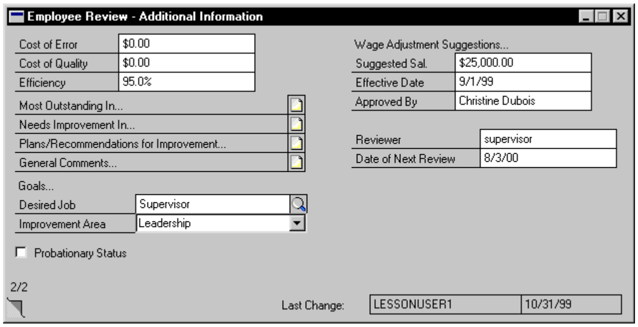
Use the Employee Review - Additional Information window to enter additional review information, such as plans for improvement or salary adjustments. You also can enter information such as the cost to the company, if any, associated with an employee's infraction.

To enter additional employee review information:

1. Open the Employee Review window.
   (Cards >> Human Resources >> Employee >> Reviews)

2. Enter or select an employee ID and review date.

3. Choose the page turn icon to open the Employee Review - Additional Information window.



Employee Review - Additional Information

Cost of Error: $0.00
Cost of Quality: $0.00
Efficiency: 95.0%
Wage Adjustment Suggestions...
Suggested Sal.: $25,000.00
Effective Date: 9/1/99
Approved By: Christine Dubois
Reviewer: supervisor
Date of Next Review: 8/3/00
Goals...
Desired Job: Supervisor
Improvement Area: Leadership
☐ Probationary Status
Last Change: LESSONUSER1 10/31/99

4. Enter the amount in the Cost of Error field that the error for which the employee was responsible cost the company.

5. Enter any cost associated with a decrease in quality of a product or service in the Cost of Error field.

6. Enter a discretionary percentage of efficiency for this employee's performance and choose any of the note buttons to enter additional comments about the employee's performance.

7. Enter or select a desired position if the employee is working to earn a new position.

8. Enter or select an area the employee needs to improve and mark Probationary Status if this employee is on probation.

9. Enter information for wage adjustment suggestions, including the effective date and the person approving the wage adjustment.

10. Enter the reviewer's name and date of review.

11. Choose the page turn icon to close the Employee Review - Additional Information window. The Employee Review window will be displayed.

12. Choose Save.

Scoring employee reviews using numbers

You can enter numerical review information for each employee in the Employee Review window. You can give each review category a score. Each category score is then multiplied by the weight defined in the Review Policies Setup window, producing a weighted score. The total of the weighted scores divided by the total of the weight factors equals the total review score. To create a review form, refer to *Setting up a review policy based on numbers* in Chapter 12, "Employee Review Setup," of the Human Resources Installation and Setup manual.

For example, an employee scored 8, 6, 6 and 7 in each category, respectively. The review score for each category and the final review score are calculated below.

Category	**Score**	**Weight**
Quality of work	8	2
Quantity of work	6	1
Attendance	6	1
Care of equipment	7	1

Quality of work 8 x 2 = 16

Quantity of work 6 x 1 = 6

Attendance 6 x 1 = 6

Care of equipment 7 x 1 = 7

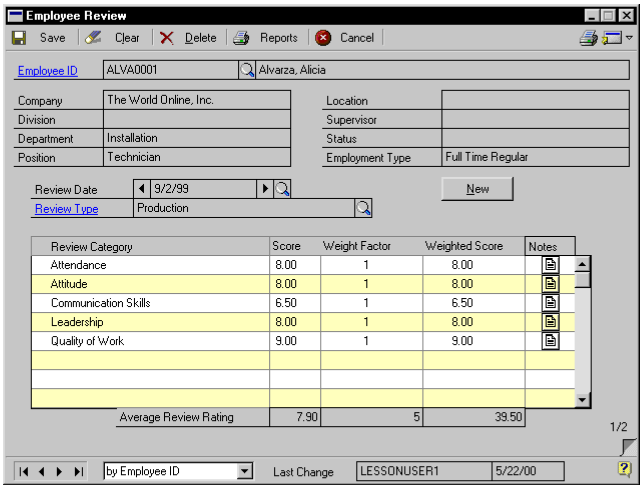
To calculate the final weighted score, add each of the category weighted scores: 16 + 6 + 6 + 7 = 35. Then divide this number by the total number of categories: 35 ÷ 4 = 8.75 for the total review score.

Modifying or deleting an employee review record

Use the Employee Review window to delete or modify an employee review. You can modify an employee review record to reflect changes such as a score or review category notes.

To modify or delete an employee review record:

1. Open the Employee Review window.
   (Cards >> Human Resources >> Employee >> Reviews)



Employee ID ALVA0001 Alvarza, Alicia

Company The World Online, Inc.
Division
Department Installation
Position Technician
Location
Supervisor
Status
Employment Type Full Time Regular

Review Date 9/2/99
Review Type Production

Review Category	Score	Weight Factor	Weighted Score	Notes
Attendance	8.00	1	8.00	🗎
Attitude	8.00	1	8.00	🗎
Communication Skills	6.50	1	6.50	🗎
Leadership	8.00	1	8.00	🗎
Quality of Work	9.00	1	9.00	🗎
Average Review Rating	7.90	5	39.50	

by Employee ID
Last Change LESSONUSER1 5/22/00

2. Enter or select an employee ID and review date.

3. Make your changes and choose Save.

4. To delete an employee review record for the review date that’s displayed, choose Delete.

Chapter 29: Employee Injury/Illness

If an employee is injured at work or has a job-related illness, you'll need to keep careful records of the injury or illness. These records are critical for meeting safety standards set by the Occupational Safety and Health Administration (OSHA).

Use the employee injury/illness windows to enter detailed information about job-related injuries and illnesses and to generate the standard reports and logs required by OSHA. You can enter the injury circumstances, treatment information and worker's compensation details.

This information is divided into the following sections:

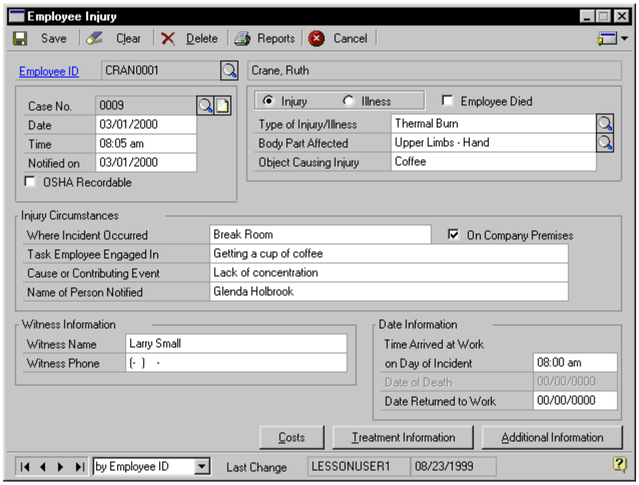
- *Adding an employee injury or illness record*
- *Adding treatment information to an employee injury/illness record*
- *Adding additional information to an employee injury/illness record*
- *Entering injury cost information*
- *Modifying or deleting an employee injury or illness record*

Adding an employee injury or illness record

Use the Employee Injury window to enter basic information about an employee's work-related injury or illness, such as the injury date and type of injury or illness.

To add an employee injury or illness record:

1. Open the Employee Injury window.
   (Cards >> Human Resources >> Employee >> Injury/Illness)



Employee ID: CRAN0001 Crane, Ruth
Case No. 0009
Date 03/01/2000
Time 08:05 am
Notified on 03/01/2000
☐ OSHA Recordable
● Injury ○ Illness ☐ Employee Died
Type of Injury/Illness: Thermal Burn
Body Part Affected: Upper Limbs - Hand
Object Causing Injury: Coffee

Injury Circumstances
Where Incident Occurred: Break Room ☑ On Company Premises
Task Employee Engaged In: Getting a cup of coffee
Cause or Contributing Event: Lack of concentration
Name of Person Notified: Glenda Holbrook

Witness Information
Witness Name: Larry Small
Witness Phone: (-) -

Date Information
Time Arrived at Work on Day of Incident: 08:00 am
Date of Death: 00/00/0000
Date Returned to Work: 00/00/0000

by Employee ID
Last Change LESSONUSER1 08/23/1999

2. Enter or select an employee ID.

3. Enter the case number, date and time the injury or illness occurred.

4. Enter the date the employee reported the injury or illness and mark the OSHA Recordable box if this incident needs to be recorded for OSHA requirements.

5. Mark Injury or Illness, depending on the circumstances of the illness or injury.

6. Mark the Employee Died checkbox if the employee died as a result of the injury or illness.

7. Enter or select the type of injury or illness, the body part affected and the cause of the injury or illness.

8. Enter the additional information relating to the injury in the Injury Circumstances section of the window.

9. Enter witness information, if applicable and the date information that applies to the incident.

10. Choose Costs to open the Injury Costs window, where you can enter cost information associated with the work-related injury or illness. For more information, refer to *Entering injury cost information* on page 214.
11. Choose Treatment Information to open the Employee Injury - Treatment Information window where you can enter treatment information for the injury or illness. For more information, refer to *Adding treatment information to an employee injury/illness record* on page 211.
12. Choose Additional Information to open the Employee Injury - Additional Information window where you can enter additional information associated with the work-related injury or illness. For more information, refer to *Adding additional information to an employee injury/illness record* on page 213.
13. Choose Save.

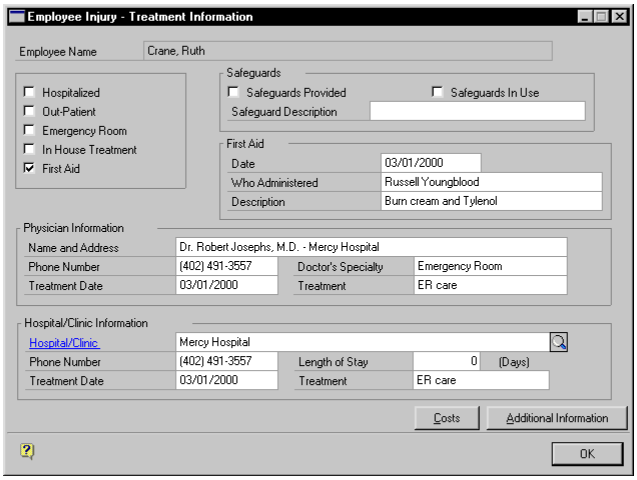
Adding treatment information to an employee injury/illness record

Use the Employee Injury - Treatment Information window to enter treatment information for an employee's work-related injury or illness, such as physician or clinic information.

To add treatment information to an employee injury/illness record:

1. Open the Employee Injury window.
   (Cards >> Human Resources >> Employee >> Injury/Illness)

2. Enter or select an employee ID and case number and choose Treatment Information to open the Employee Injury - Treatment Information window.



Employee Injury - Treatment Information

Employee Name: Crane, Ruth

☐ Hospitalized
☐ Out-Patient
☐ Emergency Room
☐ In House Treatment
☑ First Aid

Safeguards
☐ Safeguards Provided
☐ Safeguards In Use
Safeguard Description:

First Aid
Date: 03/01/2000
Who Administered: Russell Youngblood
Description: Burn cream and Tylenol

Physician Information
Name and Address: Dr. Robert Josephs, M.D. - Mercy Hospital
Phone Number: (402) 491-3557
Doctor's Specialty: Emergency Room
Treatment Date: 03/01/2000
Treatment: ER care

Hospital/Clinic Information
Hospital/Clinic: Mercy Hospital
Phone Number: (402) 491-3557
Length of Stay: 0 (Days)
Treatment Date: 03/01/2000
Treatment: ER care

3. Mark all the boxes that apply for the type of treatment the employee required.

4. Mark whether safeguards were provided and in use. If so, enter a brief description of the preventive measures that were in place.

5. Enter the date first aid was administered, who administered it and a description of what was administered, if applicable.

6. Enter physician, hospital and clinic information, if applicable.

7. Choose OK. Choose Save in the Employee Injury window.

8. Choose Costs to open the Injury Costs window where you can enter cost information associated with the work-related injury or illness. For more information, refer to *Entering injury cost information* on page 214.

9. Choose Additional Information to open the Employee Injury - Additional Information window where you can enter additional information associated with the work-related injury or illness. For more information, refer to *Adding additional information to an employee injury/ illness record* on page 213.

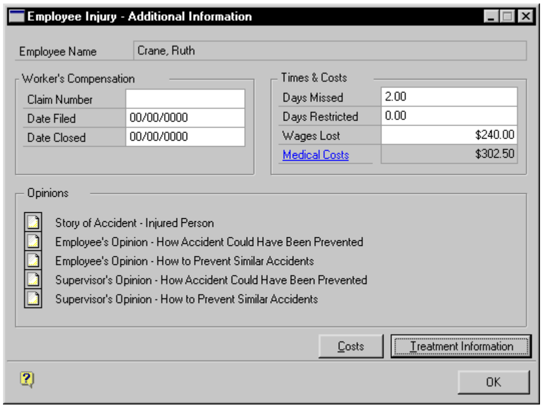
Adding additional information to an employee injury/illness record

Use the Employee Injury - Additional Information window to enter additional information about an employee's work-related injury or illness, such as worker's compensation information and time missed from work.

To add additional information to an employee injury/illness record:

1. Open the Employee Injury window.
   (Cards >> Human Resources >> Employee >> Injury/Illness)

2. Enter or select an employee ID and case number and choose Additional Information to open the Employee Injury - Additional Information window.



Employee Injury - Additional Information
Worker's Compensation
Times & Costs
Opinions
Story of Accident - Injured Person
Employee's Opinion - How Accident Could Have Been Prevented
Employee's Opinion - How to Prevent Similar Accidents
Supervisor's Opinion - How Accident Could Have Been Prevented
Supervisor's Opinion - How to Prevent Similar Accidents
Costs
Treatment Information
OK

Employee Name: Crane, Ruth
Claim Number:
Date Filed: 00/00/0000
Date Closed: 00/00/0000
Days Missed: 2.00
Days Restricted: 0.00
Wages Lost: $240.00
Medical Costs: $302.50

3. Enter worker's compensation information, such as the claim number, date filed and date closed.

4. Enter details about the time the employee missed work or had work restrictions due to the injury or illness.

5. Choose any of the opinion note buttons to enter additional comments.

6. Choose OK. Choose Save in the Employee Injury window.

7. Choose Costs to open the Injury Costs window where you can enter cost information associated with the work-related injury or illness. For more information, refer to *Entering injury cost information* on page 214.

8. Choose Treatment Information to open the Employee Injury - Treatment Information window where you can enter treatment information for the injury or illness. For more information, refer to *Adding treatment information to an employee injury/illness record* on page 211.

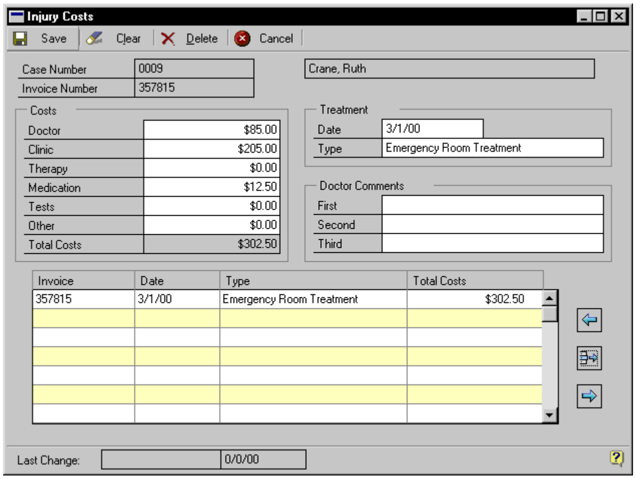
Entering injury cost information

Use the Injury Costs window to enter cost information about the employee's work-related injury.

To enter injury cost information:

1. Open the Employee Injury window.
   (Cards >> Human Resources >> Employee >> Injury/Illness)

2. Choose Costs to open the Injury Costs window.



Case Number: 0009
Invoice Number: 357815
Crane, Ruth

Costs	
Doctor	$85.00
Clinic	$205.00
Therapy	$0.00
Medication	$12.50
Tests	$0.00
Other	$0.00
Total Costs	$302.50

Treatment
Date: 3/1/00
Type: Emergency Room Treatment

Doctor Comments
First:
Second:
Third:

Invoice	Date	Type	Total Costs
357815	3/1/00	Emergency Room Treatment	$302.50

Last Change: 0/0/00

3. Enter the invoice number and all the costs associated with the injury or illness in the costs fields.

4. Enter the treatment date and type and doctor comments about the injury or illness.

5. Choose the insert icon button to save the information for each invoice.

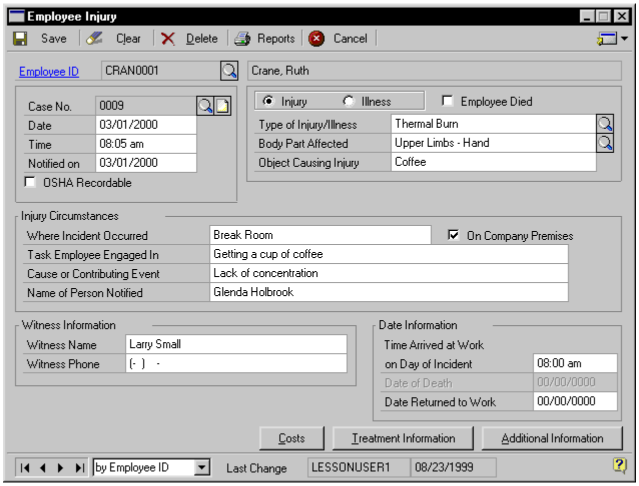
6. Close the window.

Modifying or deleting an employee injury or illness record

Use the Employee Injury window to modify or delete an injury or illness record.

To modify or delete an employee injury or illness record:

1. Open the Employee Injury window.
   (Cards >> Human Resources >> Employee >> Injury/Illness)



Employee ID: CRAN0001 Crane, Ruth
Case No.: 0009
Date: 03/01/2000
Time: 08:05 am
Notified on: 03/01/2000
☐ OSHA Recordable
● Injury ○ Illness ☐ Employee Died
Type of Injury/Illness: Thermal Burn
Body Part Affected: Upper Limbs - Hand
Object Causing Injury: Coffee

Injury Circumstances
Where Incident Occurred: Break Room ☑ On Company Premises
Task Employee Engaged In: Getting a cup of coffee
Cause or Contributing Event: Lack of concentration
Name of Person Notified: Glenda Holbrook

Witness Information
Witness Name: Larry Small
Witness Phone: (-) -

Date Information
Time Arrived at Work on Day of Incident: 08:00 am
Date of Death: 00/00/0000
Date Returned to Work: 00/00/0000

by Employee ID
Last Change: LESSONUSER1 08/23/1999

2. Enter or select an employee ID and case number.

3. Make your changes and choose Save.

4. To delete an employee injury or illness record, choose Delete.

PART 8: EMPLOYEE HISTORY

Part 8: Employee History

This part of the documentation describes how to view employee earnings and position history, how to track employee requests for position transfers and how to use termination checklists to gather information from employees.

The following information is discussed:

Chapter 30, "Employee Earnings and Position History," explains how to view employee earnings and the positions an employee has had in your organization, and enter position history and earnings history records.

Chapter 31, "Employee Transfers," describes how to track an employee's request to be transferred to another position, using the Employee Transfer Request window.

Chapter 32, "Employee Termination," describes how to use the information in the Termination Checklist window as a basis for exit interviews and to gather feedback from employees who are changing positions within your company or who are leaving the company.

Chapter 30: Employee Earnings and Position History

Use the Earnings History window to view, change or delete employee earnings records. You can delete individual earnings record or the entire employee earnings history. If you marked Edit Attendance History and Earnings History in the Human Resources Preferences window, you can change the Effective Date, Pay Rate, Pay Period and Increase Reason fields.

If you're setting up Human Resources for the first time and want to store employee position history, you should enter employee position history records to ensure that position history reports are correct.

You can enter position history information using the Position History Detail window. You also can create an employee position history record when you modify position information in the Employee Maintenance window. Use the Position History window to view the positions an employee has had in your organization, as well as the department, division and HR status for each position.

Because records added from the Employee Maintenance window and the Position History window will include identical information, you should enter historical information—such as when you first begin using the system—using the Position History window and use the Employee Maintenance window for regular position changes. For more information about adding an employee history position record using the Employee Maintenace window, refer to *Changing an employee's position* on page 54.

This information is divided into the following sections:

- *Viewing or changing or deleting an employee earnings history record*
- *Adding an employee position history record*
- *Modifying or deleting an employee position history record*
- *Viewing an employee position history record*

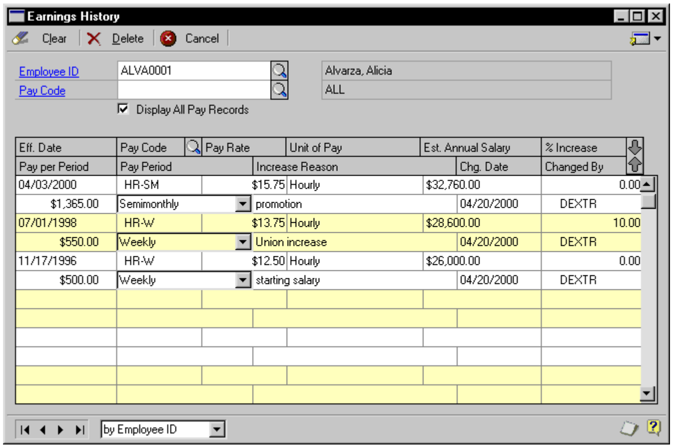
Viewing or changing or deleting an employee earnings history record

Use the Earnings History window to view an employee's earnings history records, including effective date, pay rate and the estimated annual salary for each pay code. To change earnings history, you must mark Edit Attendance History and Earnings History in the Human Resources

Preferences window. You also can delete one earnings history record or an employee’s entire earnings history.

To view, change or delete an employee earnings history record:

1. Open the Earnings History window.
(Cards >> Human Resources >> Employee >> Earnings History)



Employee ID: ALVA0001 — Alvarza, Alicia
Pay Code: — ALL
☑ Display All Pay Records

Eff. Date	Pay Code	Pay Rate	Unit of Pay	Est. Annual Salary	% Increase
Pay per Period	**Pay Period**	**Increase Reason**		**Chg. Date**	**Changed By**
04/03/2000	HR-SM	$15.75	Hourly	$32,760.00	0.00
$1,365.00	Semimonthly	promotion		04/20/2000	DEXTR
07/01/1998	HR-W	$13.75	Hourly	$28,600.00	10.00
$550.00	Weekly	Union increase		04/20/2000	DEXTR
11/17/1996	HR-W	$12.50	Hourly	$26,000.00	0.00
$500.00	Weekly	starting salary		04/20/2000	DEXTR

2. Enter or select an employee ID and a pay code.

3. To view all pay records for this employee, mark Display All Pay Records.

4. You can change the Eff. Date, Pay Rate, Pay Period and Increase Reason fields. The information is saved automatically.

5. To delete an earnings history record, select the record and choose Edit >> Delete Row.

6. To delete an employee’s entire earnings history, choose Delete.

Adding an employee position history record

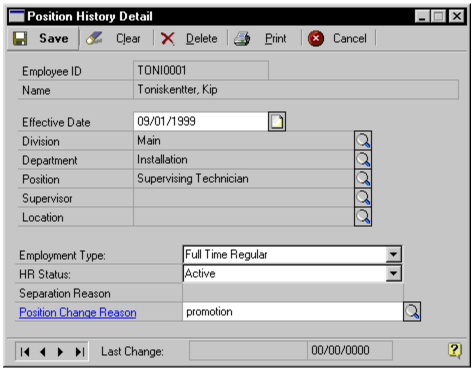
Use the Position History Detail window to add an employee position history record. You can enter organizational information, such as division, department and position. You also can enter employment type and HR status information.

To add an employee position history record:

1. Open the Position History window.
   (Cards >> Human Resources >> Employee >> Position History)

2. Enter or select an employee ID.

3. Choose New to open the Position History Detail window.



Employee ID	TONI0001
Name	Toniskentter, Kip
Effective Date	09/01/1999
Division	Main
Department	Installation
Position	Supervising Technician
Supervisor	
Location	
Employment Type:	Full Time Regular
HR Status:	Active
Separation Reason	
Position Change Reason	promotion
Last Change:	00/00/0000

4. Enter the effective date of the position.

5. Select a division, department, position, supervisor and location.

6. Select an employment type and HR status for the position. If you selected the HR status Separated, enter the reason for separation.

7. Enter or select a position change reason.

8. Choose Save.

9. Repeat steps 4 through 8 until you've entered all the employee's history information.

Modifying or deleting an employee position history record

Use the Position History Detail window to modify or delete an employee position history record. You can modify an employee position history record to correct errors made when changing an employee's position in the Employee Maintenance window. You also can use this window to delete an employee position history record.

Changing an employee's position history record doesn't change the position information in the Employee Maintenance window.

To modify or delete an employee position history record:

1. Open the Position History window.
   (Cards >> Human Resources >> Employee >> Position History)

2. Enter or select an employee ID.

3. To modify a position history record, highlight the record and choose Select to open the Position History Detail window.

4. Make your changes and choose Save.

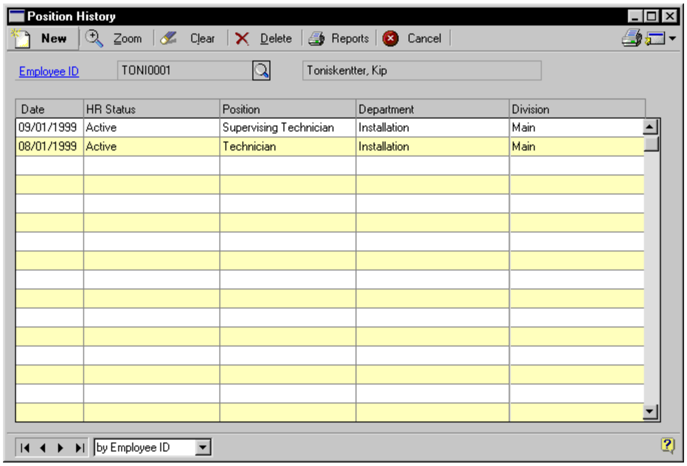
5. To delete a position history record, choose Delete.

Viewing an employee position history record

Use the Position History window to view employee position history. You can view information such as the position, department and division as well as the HR status.

To view an employee position history record:

1. Open the Position History window.
   (Cards >> Human Resources >> Employee >> Position History)



Position History
New
Zoom
Clear
Delete
Reports
Cancel
by Employee ID

Employee ID: TONI0001 Toniskentter, Kip

Date	HR Status	Position	Department	Division
09/01/1999	Active	Supervising Technician	Installation	Main
08/01/1999	Active	Technician	Installation	Main

2. Enter or select an employee ID.

3. Close the window when you've finished.

Chapter 31: Employee Transfers

Use the Employee Transfer Request window to track an employee's request to be transferred to another position. You also can track multiple transfer requests for each employee in your organization.

This information is divided into the following sections:

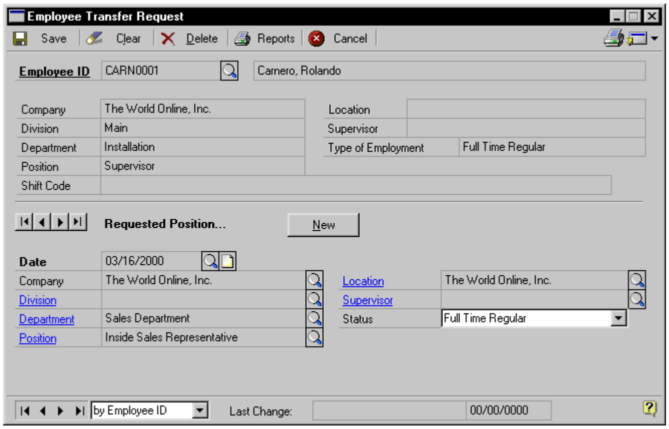
- *Adding an employee transfer request record*
- *Modifying or deleting an employee transfer request record*

Adding an employee transfer request record

Use the Employee Transfer Request window to add an employee's request for a transfer to another position within your organization.

To add an employee transfer request record:

1. Open the Employee Transfer Request window.
   (Cards >> Human Resources >> Employee >> Transfers)



Employee ID	CARN0001	Carnero, Rolando	
Company	The World Online, Inc.	Location	
Division	Main	Supervisor	
Department	Installation	Type of Employment	Full Time Regular
Position	Supervisor		
Shift Code			

Date	03/16/2000		
Company	The World Online, Inc.	Location	The World Online, Inc.
Division		Supervisor	
Department	Sales Department	Status	Full Time Regular
Position	Inside Sales Representative		

by Employee ID

Last Change: 00/00/0000

2. Enter or select an employee ID. The employee's existing position information will be displayed in the top of the window.

3. Enter the date of the transfer request and choose the note button next to the Date to enter more information about the transfer request.

4. Enter or select the company, division and department, position, location and supervisor.
5. Select the requested position.
6. Choose Save.

Modifying or deleting an employee transfer request record

Use the Employee Transfer Request window to modify or delete a transfer request record. You can modify an employee transfer request record to reflect changes such as a division or type of employment.

To modify or delete an employee transfer request record:

1. Open the Employee Transfer Request window.
   (Cards >> Human Resources >> Employee >> Transfers)
2. Enter or select an employee ID.

If your company grants transfer requests on a first-come, first-served basis, you might want to create a new transfer request record for an employee, rather than changing an existing record.

3. Enter or select the transfer request date.
4. Make your changes and choose Save.
5. To delete a transfer request record, choose Delete.

Chapter 32: Employee Termination

When an employee leaves your company, you'll want to be sure the payroll and human resources departments are notified and company property in the possession of the employee is returned. Use the information in the Termination Checklist window as a basis for exit interviews. You can gather feedback from employees who are changing positions within your company or who are leaving the company.

Use the termination checklists to be sure you've completed tasks like notifying the payroll department of an employee's termination and notifying the employee of his or her COBRA rights. You can use the default termination checklists included with your Human Resources program, or you can modify the checklists to suit your company's specific needs. For more information about creating a termination checklist, refer to *Setting up a termination checklist using default options* and *Setting up a termination checklist* in Chapter 10, "Orientation and Termination Checklists," of the Human Resources Installation Setup manual.

This information is divided into the following sections:

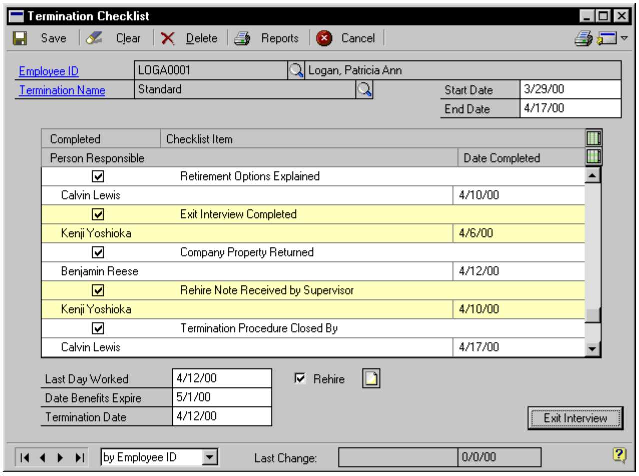
- *Adding an employee termination record*
- *Adding an exit interview record*
- *Modifying or deleting an employee termination record*
- *Completing an employee's termination record*

Adding an employee termination record

Use the Termination Checklist window to enter an employee termination record. You can track information such as the date benefits expire and the employee's rehire status.

To add an employee termination record:

1. Open the Termination Checklist window.
   (Cards >> Human Resources >> Employee >> Termination)



Employee ID: LOGA0001 — Logan, Patricia Ann
Termination Name: Standard
Start Date: 3/29/00
End Date: 4/17/00

Completed	Checklist Item	Person Responsible	Date Completed
☑	Retirement Options Explained	Calvin Lewis	4/10/00
☑	Exit Interview Completed	Kenji Yoshioka	4/6/00
☑	Company Property Returned	Benjamin Reese	4/12/00
☑	Rehire Note Received by Supervisor	Kenji Yoshioka	4/10/00
☑	Termination Procedure Closed By	Calvin Lewis	4/17/00

Last Day Worked: 4/12/00
Date Benefits Expire: 5/1/00
Termination Date: 4/12/00
☑ Rehire
Last Change: 0/0/00

2. Enter or select an employee ID.

3. Select the name of a checklist from the Termination Name field and accept the Start Date or enter the date the termination process started. The default date will be the system date of your computer.

4. Expand the scrolling window. Enter or select the person responsible for each checklist item.

5. When you complete an item, mark Completed for the item and enter the date completed.

6. Choose Save.

Adding an exit interview record

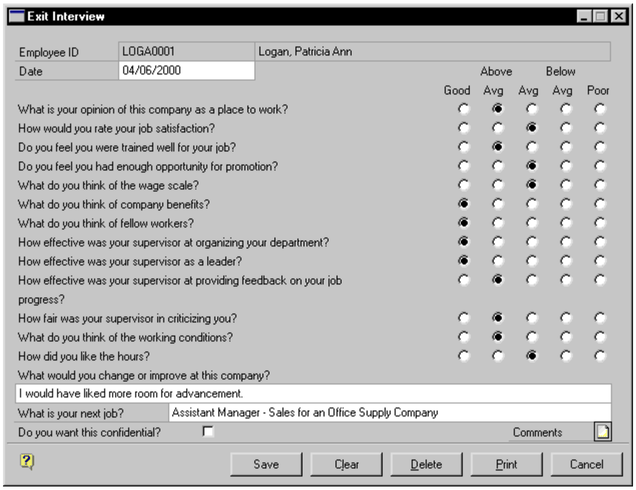
Use the Exit Interview window to enter employee comments about the position he or she is leaving. The window provides a list of questions you can use as a basis for the exit interview. You also can enter information about the employee's new position and additional comments.

To add an exit interview record:

1. Open the Termination Checklist window.
   (Cards >> Human Resources >> Employee >> Termination)

2. Enter or select an employee ID.

3. Select the termination name and chose Exit Interview to open the Exit Interview window.



Employee ID LOGA0001 Logan, Patricia Ann
Date 04/06/2000

	Good	Above Avg	Avg	Below Avg	Poor
What is your opinion of this company as a place to work?	○	●	○	○	○
How would you rate your job satisfaction?	○	○	●	○	○
Do you feel you were trained well for your job?	○	●	○	○	○
Do you feel you had enough opportunity for promotion?	○	○	●	○	○
What do you think of the wage scale?	○	○	●	○	○
What do you think of company benefits?	●	○	○	○	○
What do you think of fellow workers?	●	○	○	○	○
How effective was your supervisor at organizing your department?	●	○	○	○	○
How effective was your supervisor as a leader?	●	○	○	○	○
How effective was your supervisor at providing feedback on your job progress?	○	●	○	○	○
How fair was your supervisor in criticizing you?	○	●	○	○	○
What do you think of the working conditions?	○	●	○	○	○
How did you like the hours?	○	○	●	○	○

What would you change or improve at this company?
I would have liked more room for advancement.
What is your next job? Assistant Manager - Sales for an Office Supply Company
Do you want this confidential? ☐

4. Enter the date the exit interview was conducted.

5. Mark the employee's response to each exit interview question and indicate if the employee wants to keep the exit interview confidential.

6. To enter additional information about the exit interview, use the comments notes button.

7. Choose Save. The Termination Checklist window will be displayed.

Modifying or deleting an employee termination record

Use the Termination Checklist window to modify or delete an employee termination record. You can modify the record to reflect changes such as completing a checklist item.

To modify or delete an employee termination record:

1. Open the Termination Checklist window.
   (Cards >> Human Resources >> Employee >> Termination)
2. Enter or select an employee ID and select a termination name.
3. Make your changes to the termination checklist items and choose Save.
4. To delete a termination record, choose Delete.

Completing an employee's termination record

Use the Termination Checklist window to complete an employee's termination record. You can complete the termination checklist when you've finished all of the checklist items. You also can enter the employee's last day worked and termination date. These dates will be displayed in the Employee Maintenance window.

To complete an employee's termination record:

1. Open the Termination Checklist window.
   (Cards >> Human Resources >> Employee >> Termination)
2. Enter or select an employee ID.
3. Select a termination name and enter the date the employee's termination checklist was completed in the End Date field.
4. Enter the Last Day Worked and mark Rehire if the employee is eligible to be rehired by the company. The Last Day Worked also will be displayed in the Last Day Worked field in the Employee Maintenance window.
5. Enter the date the employee's benefits expire and the termination date. The Termination Date also will be displayed in the Last Day Worked field in the Employee Maintenance window.
6. Choose Save.

PART 9: ORGANIZATION EXPLORER AND SALARY MATRIX

Part 9: Organization Explorer and Salary Matrix

This part of the documentation describes how to use the Organization Explorer and Salary Matrix windows to enter and store information.

The following information is discussed:

Chapter 33, "Organization Explorer," explains how to use the Organization Explorer window as a tool to manage your organization's positions by creating positions, assigning positions to employee records and creating requisitions.

Chapter 34, "Salary Matrix," describes how to define low-, mid- and high-range pay levels for your organization's employees and track employee salary amounts that are above or below the salary range defined for a pay code and a position.

Chapter 33: Organization Explorer

Use the Organization Explorer window as a tool to manage your organization's positions. You can create positions, assign positions to employee records and create requisitions. You also can view a graphical representation of your organization, including companies, divisions, departments, positions, employees and vacant positions.

You can zoom to any of the organizational setup windows to create or modify new divisions, departments and positions. You can open the Vacancy Maintenance window from the Organization Explorer to change the number of vacant positions.

The Organization Explorer window also displays the employee's full time equivalency (FTE) information. You can assign an FTE to an employee's position, and if an employee has multiple positions, you can assign an FTE to each position. Usually, a full time position equals 1.00.

This information is divided into the following sections:

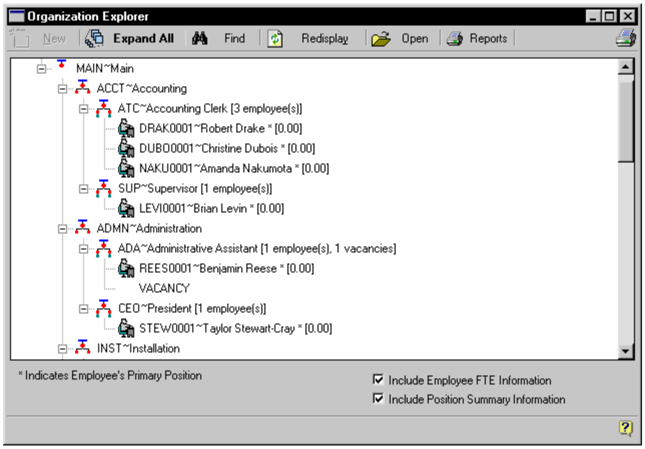
- *Viewing organizational information*
- *Creating or changing the number of vacancies for a position*
- *Creating a new employee record for a position*
- *Transferring an employee to a vacant position*
- *Creating a new requisition for a position*

Viewing organizational information

Use the Organization Explorer window to view the companies, divisions, departments, positions, vacant positions and employees in your organization.

To view organizational information:

1. Open the Organization Explorer window:
   (Cards >> Human Resources >> Organization Explorer)



```
MAIN~Main
  ACCT~Accounting
    ATC~Accounting Clerk [3 employee(s)]
      DRAK0001~Robert Drake * [0.00]
      DUBO0001~Christine Dubois * [0.00]
      NAKU0001~Amanda Nakumota * [0.00]
    SUP~Supervisor [1 employee(s)]
      LEVI0001~Brian Levin * [0.00]
  ADMN~Administration
    ADA~Administrative Assistant [1 employee(s), 1 vacancies]
      REES0001~Benjamin Reese * [0.00]
      VACANCY
    CEO~President [1 employee(s)]
      STEW0001~Taylor Stewart-Cray * [0.00]
  INST~Installation
```

* Indicates Employee's Primary Position

☑ Include Employee FTE Information
☑ Include Position Summary Information

2. Choose Expand All to view all organizational levels.

Creating or changing the number of vacancies for a position

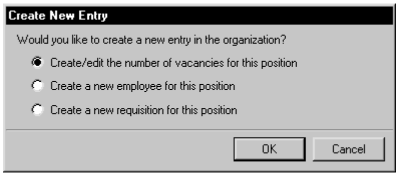
Use the Vacancy Maintenance window to create or change the number of vacancies for a position. You can increase the number of vacancies for a position if you're adding employees for a position. You can decrease the number of vacancies for a position if an employee is hired for a position.

To create or change the number of vacancies for a position:

1. Open the Organization Explorer window:
   (Cards >> Human Resources >> Organization Explorer)

2. Choose Expand All to view all organizational levels.

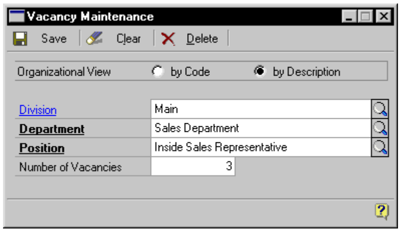
3. Highlight a position, employee name or vacancy and choose New. The Create New Entry window will open.



Would you like to create a new entry in the organization?

● Create/edit the number of vacancies for this position
○ Create a new employee for this position
○ Create a new requisition for this position

4. Mark Create/edit the number of vacancies for this position and choose OK. The Vacancy Maintenance window will open.



Organizational View ○ by Code ● by Description

Division	Main
Department	Sales Department
Position	Inside Sales Representative
Number of Vacancies	3

5. Enter the number of vacancies for this position.

6. Choose Save.

   To view changes in the Organization Explorer window, choose Redisplay and then choose Expand All.

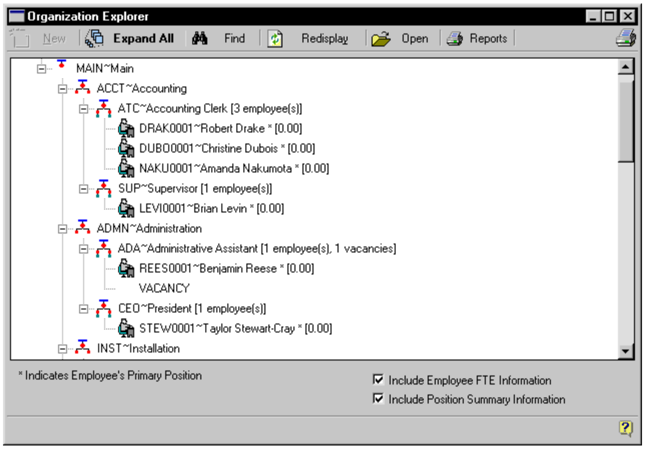
Creating a new employee record for a position

Use the Organization Explorer window to create a new employee record for a position. If Always or Ask Each Time is marked for either Automatically Create/Update Vacancies or Automatically Create/Update Organizational Requisitions in the Human Resources Preferences window, the system automatically will decrease the number of vacancies or requisitions for the position being filled.

To create a new employee record for a vacant position, follow these instructions. To assign an existing employee record to a vacant position, refer to *Transferring an employee to a vacant position* on page 236.

To create a new employee record for a position:

1. Open the Organization Explorer window:
   (Cards >> Human Resources >> Organization Explorer)



```
MAIN~Main
  ACCT~Accounting
    ATC~Accounting Clerk [3 employee(s)]
      DRAK0001~Robert Drake * [0.00]
      DUBO0001~Christine Dubois * [0.00]
      NAKU0001~Amanda Nakumota * [0.00]
    SUP~Supervisor [1 employee(s)]
      LEVI0001~Brian Levin * [0.00]
  ADMN~Administration
    ADA~Administrative Assistant [1 employee(s), 1 vacancies]
      REES0001~Benjamin Reese * [0.00]
      VACANCY
    CEO~President [1 employee(s)]
      STEW0001~Taylor Stewart-Cray * [0.00]
  INST~Installation
```

* Indicates Employee's Primary Position

☑ Include Employee FTE Information
☑ Include Position Summary Information

2. Choose Expand All to view all organizational levels.

3. Highlight a position, employee name or vacancy and choose New. The Create New Entry window will open.

4. Mark Create a new employee for this position and choose OK. The Employee Maintenance window will open.

5. Select an employee ID and choose Save. Close the Employee Maintenance window.

   The new employee record for the position will be displayed in the Organization Explorer window.

To view the new employee record for the position, choose Redisplay and then Expand All.

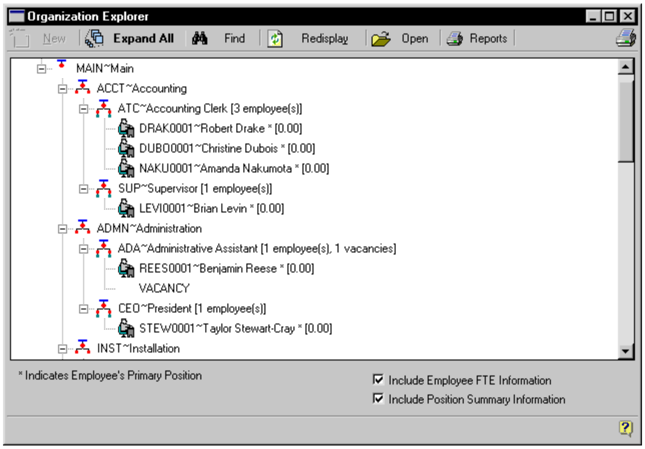
Transferring an employee to a vacant position

Use the Organization Explorer window to attach an existing employee record to a position. If you mark Always or Ask Each Time for Automatically Create/Update Vacancies or Automatically Create/Update Organizational Requisitions in the Human Resources Preferences window, the system automatically will decrease the number of vacancies or requisitions for the position being filled.

To assign an existing employee record to a vacant position, follow these instructions. To create a new employee record for a vacant position, refer to *Creating a new employee record for a position* on page 235.

To transfer an employee to a vacant position:

1. Open the Organization Explorer window.
   (Cards >> Human Resources >> Organization Explorer)



```
MAIN~Main
  ACCT~Accounting
    ATC~Accounting Clerk [3 employee(s)]
      DRAK0001~Robert Drake * [0.00]
      DUBO0001~Christine Dubois * [0.00]
      NAKU0001~Amanda Nakumota * [0.00]
    SUP~Supervisor [1 employee(s)]
      LEVI0001~Brian Levin * [0.00]
  ADMN~Administration
    ADA~Administrative Assistant [1 employee(s), 1 vacancies]
      REES0001~Benjamin Reese * [0.00]
      VACANCY
    CEO~President [1 employee(s)]
      STEW0001~Taylor Stewart-Cray * [0.00]
  INST~Installation
```

* Indicates Employee's Primary Position

☑ Include Employee FTE Information
☑ Include Position Summary Information

2. Choose Expand All to view all organizational levels.

3. Highlight a position, employee name or vacancy and choose New. The Create New Entry window will open.

4. Mark Create a new employee for this position and choose OK. The Employee Maintenance window will open.

5. Select an employee ID and enter or select the vacant position and corresponding department.

6. Choose Save. You'll have the option to save changes to employee history.

   To view the employee record for the position in the Organization Explorer window, choose Redisplay and then choose Expand All.

Creating a new requisition for a position

Use the Requisitions window to create a new requisition for an open position. A requisition can contain all the applicable information for an open position, such as the status, position and costs associated with the open position.

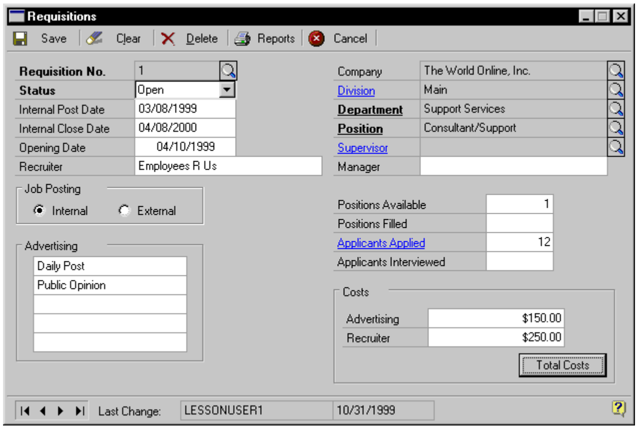
To create a new requisition for a position:

1. Open the Organization Explorer window:
   (Cards >> Human Resources >> Organization Explorer)

2. Choose Expand All to view all organizational levels.

3. Highlight a position, employee name or vacancy and choose New. The Create New Entry window will open.

4. Mark Create a new requisition for this position and choose OK. The Requisitions window will open.



Requisition No.	1
Status	Open
Internal Post Date	03/08/1999
Internal Close Date	04/08/2000
Opening Date	04/10/1999
Recruiter	Employees R Us
Company	The World Online, Inc.
Division	Main
Department	Support Services
Position	Consultant/Support
Supervisor	
Manager	

Job Posting
● Internal ○ External

Advertising
Daily Post
Public Opinion

Positions Available	1
Positions Filled	
Applicants Applied	12
Applicants Interviewed	

Costs

Advertising	$150.00
Recruiter	$250.00

Last Change: LESSONUSER1 10/31/1999

5. Enter the requisition information and choose Save.

   To see a vacant position for this requisition in the Organization Explorer window, you must create or change the number of vacancies for a position using the Vacancy Maintenance window. For more information about creating or changing the number of vacancies for a position, refer to *Creating or changing the number of vacancies for a position* on page 234.

Chapter 34: Salary Matrix

The salary matrix window is like a spreadsheet that allows you to define low-, mid- and high-range pay levels within your organization. By creating and using one or more salary matrices, you can track employee salary amounts that are within and outside of an employee's pay code and salary amounts.

You can define several salary tables or matrices that outline salary and pay grade information. You can then link the salary matrices to specific positions and pay codes within your company. You also can update salary information to reflect percentage or fixed-amount changes to the pay rates stored in the matrices.

Once you've linked figures for low-end and high-end salaries to a pay code, a message will appear when you enter pay rates that are lower or higher than the standards set for a particular pay code.

For example, suppose the high end salary for a supervisor salary pay code in your company is $40,000 per year, and the low end salary is $23,000. Once you attach these figures to your position definition and try to enter a salary of $22,500 for any supervisor, the message "Pay rate is outside of the Salary Matrix" will be displayed. You can still change the employee's pay code, but you also will know the new range is outside of the salary matrix ranges.

This information is divided into the following sections:

- *Adding a salary matrix*
- *Modifying or deleting a salary matrix*
- *Updating salary matrices*

Adding a salary matrix

Use the Salary Matrix window to create a salary matrix. A salary matrix can have multiple rows and columns of information. For example, if your company has a salary matrix for production workers, your column headings might be 0-2 months, 3-6 months, 7-12 months and 13-24 months and your row headings might be Labor Grade 2, Labor Grade 4, Labor Grade 6 and Labor Grade 8.

To add a salary matrix:

1. Open the Salary Matrix window.
   (Setup >> Human Resources >> Salary Matrix)

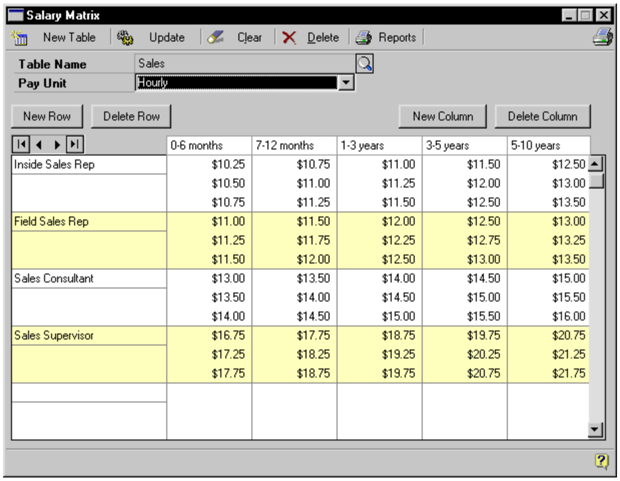


Table Name Sales
Pay Unit Hourly

	0-6 months	7-12 months	1-3 years	3-5 years	5-10 years
Inside Sales Rep	$10.25	$10.75	$11.00	$11.50	$12.50
	$10.50	$11.00	$11.25	$12.00	$13.00
	$10.75	$11.25	$11.50	$12.50	$13.50
Field Sales Rep	$11.00	$11.50	$12.00	$12.50	$13.00
	$11.25	$11.75	$12.25	$12.75	$13.25
	$11.50	$12.00	$12.50	$13.00	$13.50
Sales Consultant	$13.00	$13.50	$14.00	$14.50	$15.00
	$13.50	$14.00	$14.50	$15.00	$15.50
	$14.00	$14.50	$15.00	$15.50	$16.00
Sales Supervisor	$16.75	$17.75	$18.75	$19.75	$20.75
	$17.25	$18.25	$19.25	$20.25	$21.25
	$17.75	$18.75	$19.75	$20.75	$21.75

2. Choose New Table and enter the name of the table to create and choose OK.

3. Select the pay unit.

4. Choose New Column and enter a column heading. Column headings are usually lengths of service; for example, 0-2 months, 3-6 months.

5. Choose New Row and enter a row heading. Row headings are usually levels of a position; for example, Labor Grade 1, Labor Grade 2.

6. Enter the low salary in the top field of each column, the middle salary in the middle field of each column and the high salary in the bottom field in each column.

7. Continue adding new columns and rows and entering low, middle and high salaries for each column and row.

8. Choose Save.

Modifying or deleting a salary matrix

Use the Salary Matrix window to add or delete a row or column or change the information in just one cell. You also can delete the entire salary matrix using this window.

To modify or delete a salary matrix:

1. Open the Salary Matrix window.
   (Setup >> Human Resources >> Salary Matrix)

2. Select a table name.

3. Highlight the information to change and enter the new information.

4. To add a new row, choose Add Row. To add a new column, choose Add Row.

5. To delete the last row, choose Delete Row. To delete the last column, choose Delete Column.

6. To delete the entire table, choose Delete.

7. Close the window to save your changes.

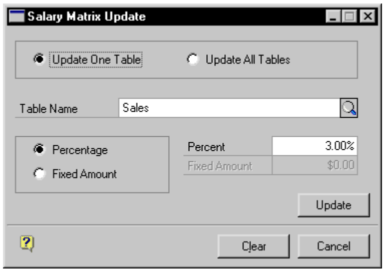
Updating salary matrices

Use the Salary Matrix Update window to make mass changes to salary amounts in the salary matrix using percentage or dollar amount changes. This will not update individual employee pay rates, only the salary matrix amounts.

To update a salary matrix:

1. Open the Salary Matrix window.
   (Setup >> Human Resources >> Salary Matrix)

2. Choose Update. The Salary Matrix Update window will open.



● Update One Table ○ Update All Tables

Table Name: Sales

● Percentage
○ Fixed Amount

Percent: 3.00%
Fixed Amount: $0.00

3. Mark Update One Table or Update All Tables.

4. If you selected Update One Table, select the table name to update.

5. Mark Percentage or Fixed Amount for the type of adjustment you want to make and enter the percentage or fixed amount of the adjustment in the Percent or Fixed Amount field.

6. Choose Update.

PART 10: INQUIRIES AND REPORTS

Part 10: Inquiries and Reports

This part of the documentation describes how to use inquiries and reports to view information in your Human Resources system.

The following information is discussed:

Chapter 35, “Inquiries,” explains how to use inquiries to quickly view both current and historical employee and benefit information.

Chapter 36, “Reports,” describes how to print reports to ensure your company is following government regulations and organize your overall human resources activity.

Chapter 35: Inquiries

Tracking employee information is an important part of your computerized human resources system. You can use the Human Resources inquiry windows to view important information about employees, their benefits and other historical data.

This information is divided into the following sections:

- *Viewing employee information*
- *Viewing operating procedures*
- *Viewing an employee combined history record*
- *Viewing redlined status information*
- *Viewing benefit and deduction information*

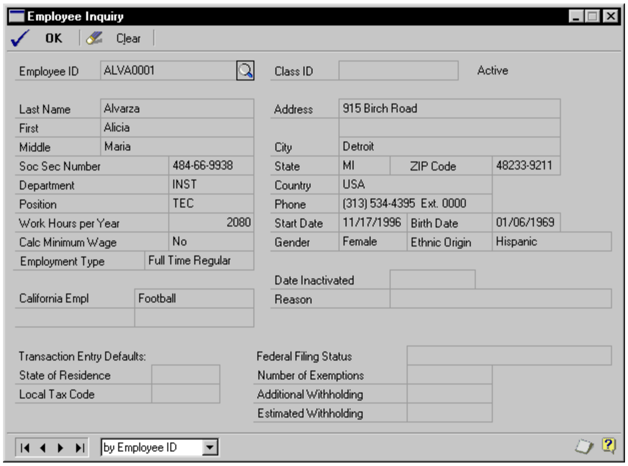
Viewing employee information

Use the Employee Inquiry window to view demographic and other information you've entered for a particular employee. This window displays personal information such as name, Social Security number, tax filing status, and demographic information such as addresses, phone numbers, and postal codes.

You also can view employment information such as status, department, position, wages and user-defined information that is defined in the Payroll Setup Options window.

To view employee information:

1. Open the Employee Inquiry window.
   (Inquiry >> Human Resources >> Employee)


Employee Inquiry
OK
Clear
Active
Class ID
Date Inactivated
Reason
Transaction Entry Defaults:
State of Residence
Local Tax Code
Federal Filing Status
Number of Exemptions
Additional Withholding
Estimated Withholding
by Employee ID

Employee ID: ALVA0001
Last Name: Alvarza
First: Alicia
Middle: Maria
Soc Sec Number: 484-66-9938
Department: INST
Position: TEC
Work Hours per Year: 2080
Calc Minimum Wage: No
Employment Type: Full Time Regular
California Empl: Football
Address: 915 Birch Road
City: Detroit
State: MI
ZIP Code: 48233-9211
Country: USA
Phone: (313) 534-4395 Ext. 0000
Start Date: 11/17/1996
Birth Date: 01/06/1969
Gender: Female
Ethnic Origin: Hispanic

2. Enter or select an employee ID.

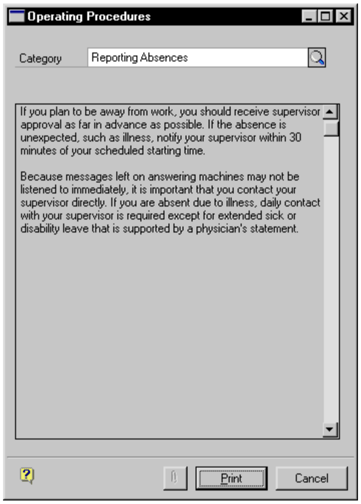
3. View the information and close the window.

Viewing operating procedures

Use the Operating Procedures window to view information about your company's operating procedures. To define and document an operating procedure, refer to *Setting up an operating procedure* in Chapter 5, "Organizational Structure," of the Human Resources Installation and Setup manual.

To view an operating procedure:

1. Open the Operating Procedures window.
   (Inquiry >> Human Resources >> Operating Procedures)



Category: Reporting Absences

If you plan to be away from work, you should receive supervisor approval as far in advance as possible. If the absence is unexpected, such as illness, notify your supervisor within 30 minutes of your scheduled starting time.

Because messages left on answering machines may not be listened to immediately, it is important that you contact your supervisor directly. If you are absent due to illness, daily contact with your supervisor is required except for extended sick or disability leave that is supported by a physician's statement.

2. Enter or select a category. To select a category, choose the lookup button, enter the name of the operating procedure and choose Find. Choose Select to display the operating procedure name in the category field.

3. Choose Print to print the Operating Procedures report.

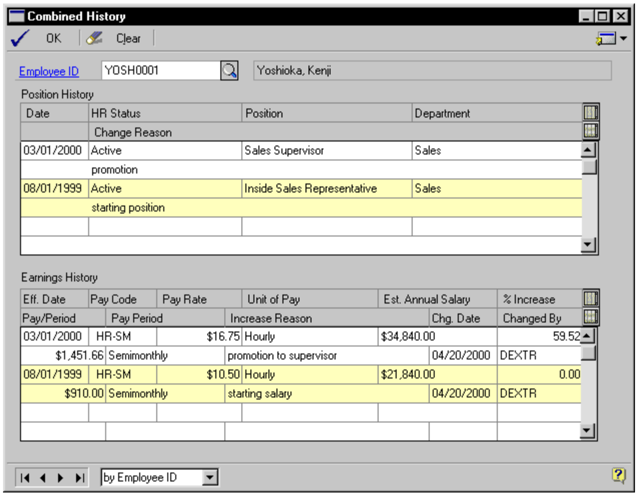
4. View the information and close the window.

Viewing an employee combined history record

Use the Combined History window to view employee position history and earnings history records. You can view position history information such as dates, positions, departments and reasons for position changes. You also can view earnings history information such as effective dates, pay codes and pay rates.

To view an employee combined history record:

1. Open the Combined History window.
   (Inquiry >> Human Resources >> Combined History)



Employee ID YOSH0001 Yoshioka, Kenji

Position History

Date	HR Status	Position	Department
	Change Reason		
03/01/2000	Active	Sales Supervisor	Sales
	promotion		
08/01/1999	Active	Inside Sales Representative	Sales
	starting position		

Earnings History

Eff. Date	Pay Code	Pay Rate	Unit of Pay	Est. Annual Salary	% Increase
Pay/Period	Pay Period		Increase Reason	Chg. Date	Changed By
03/01/2000	HR-SM	$16.75	Hourly	$34,840.00	59.52
$1,451.66	Semimonthly		promotion to supervisor	04/20/2000	DEXTR
08/01/1999	HR-SM	$10.50	Hourly	$21,840.00	0.00
$910.00	Semimonthly		starting salary	04/20/2000	DEXTR

2. Enter or select an employee ID.

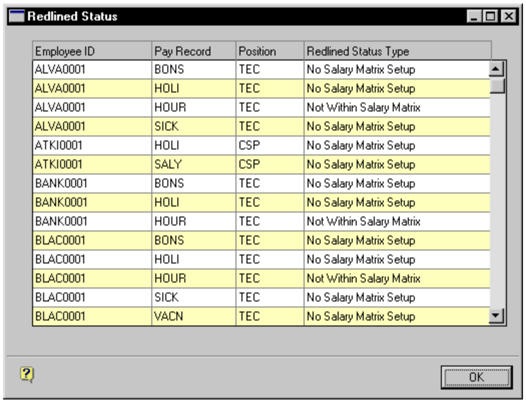
3. View the information and close the window.

Viewing redlined status information

Use the Redlined Status window to view employee records that are different than the guidelines defined in the salary matrices and explanations of why they are different. For more information about creating a redlined status table for all employees in your company, refer to *Reconciling Human Resources information* on page 265.

To view redlined status information:

1. Open the Redlined Status window.
   (Inquiry >> Human Resources >> Redlined Status)



Employee ID	Pay Record	Position	Redlined Status Type
ALVA0001	BONS	TEC	No Salary Matrix Setup
ALVA0001	HOLI	TEC	No Salary Matrix Setup
ALVA0001	HOUR	TEC	Not Within Salary Matrix
ALVA0001	SICK	TEC	No Salary Matrix Setup
ATKI0001	HOLI	CSP	No Salary Matrix Setup
ATKI0001	SALY	CSP	No Salary Matrix Setup
BANK0001	BONS	TEC	No Salary Matrix Setup
BANK0001	HOLI	TEC	No Salary Matrix Setup
BANK0001	HOUR	TEC	Not Within Salary Matrix
BLAC0001	BONS	TEC	No Salary Matrix Setup
BLAC0001	HOLI	TEC	No Salary Matrix Setup
BLAC0001	HOUR	TEC	Not Within Salary Matrix
BLAC0001	SICK	TEC	No Salary Matrix Setup
BLAC0001	VACN	TEC	No Salary Matrix Setup

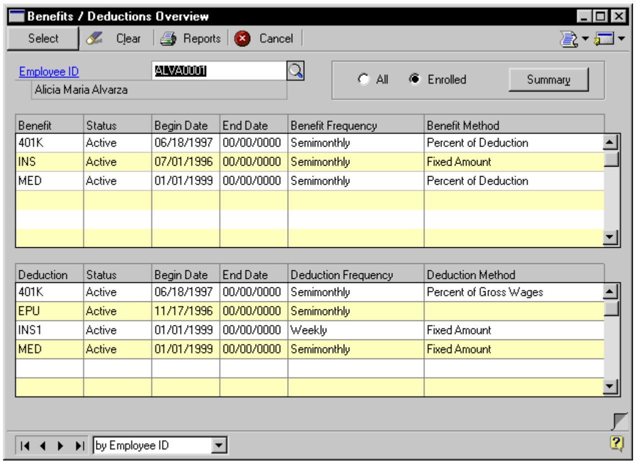
2. View the information and close the window.

Viewing benefit and deduction information

Use the Benefits/Deductions Overview window to view employee information such as the benefit and deduction codes, beginning and ending dates and frequency that the benefits and deductions occur. You can view all benefits and deductions or just those in which the employee is enrolled. To modify employee benefit or deduction records, refer to *Enrolling an employee in a health insurance plan* on page 119, *Enrolling an employee in a life insurance plan* on page 121, and *Enrolling an employee in a cash account* on page 124.

To view benefit and deduction information:

1. Open the Benefits/Deductions Overview window.
   (Inquiry >> Human Resources >> Benefits/Deductions)



Employee ID: ALVA0001
Alicia Maria Alvarza

○ All ● Enrolled

Benefit	Status	Begin Date	End Date	Benefit Frequency	Benefit Method
401K	Active	06/18/1997	00/00/0000	Semimonthly	Percent of Deduction
INS	Active	07/01/1996	00/00/0000	Semimonthly	Fixed Amount
MED	Active	01/01/1999	00/00/0000	Semimonthly	Percent of Deduction

Deduction	Status	Begin Date	End Date	Deduction Frequency	Deduction Method
401K	Active	06/18/1997	00/00/0000	Semimonthly	Percent of Gross Wages
EPU	Active	11/17/1996	00/00/0000	Semimonthly	
INS1	Active	01/01/1999	00/00/0000	Weekly	Fixed Amount
MED	Active	01/01/1999	00/00/0000	Semimonthly	Fixed Amount

by Employee ID

2. Enter or select an employee ID.

3. Mark All to view all benefits set up in Human Resources. Mark Enrolled to view the benefits the employee is enrolled in.

Chapter 36: Reports

You can use Human Resources reports to analyze activity, track changes and view applicant and employee information. For example, the benefit reports display information such as beneficiaries, history and enrollment. The applicant reports display detailed applicant information such as applicant test scores, work history and interview notes. Use the information in this chapter to guide you through printing reports and working with report options and report groups.

You can modify the reports provided with Human Resources using Report Writer. Print the report to the screen, then choose Tools >> Customize >> Modify Current report.

Reports information is divided into the following sections:

- *Using the online sample reports*
- *Human Resources report summary*
- *Report destinations and formats*
- *Processing reports on a process server*
- *Creating a report option*
- *Printing a report with an option*
- *Customizing a report*

Using the online sample reports

For detailed information about specific Human Resources reports, choose Help >> Sample Reports to view the online sample reports. The online sample reports contain illustrations and specifications of reports in Dynamics, as well as directions for printing the reports.

The online sample reports also list the technical names of the reports and the tables from which information is extracted, which you might need to know to customize reports using Report Writer. For more information about Report Writer, refer to *Customizing a report* on page 260.

Human Resources report summary

You can print several types of reports using Human Resources. You can choose to print some reports during procedures; for example, you can print the Employee Orientation Checklist - Detail report when entering employee orientation information by choosing the Print button in the Orientation

Checklist window. In order to print some reports, such as analysis or history reports, you must set up report options to specify sorting options and ranges of information to include on the report. For more information, refer to *Creating a report option* on page 258.

The following table lists the report types available in Human Resources and the reports in those categories.

Report	Report type	Printing method
Applicant reports	Applicant Archive Applicant Color Code Applicant Cost Notes Applicant Costs Applicant Data Sheet Applicant Education Applicant Education Notes Applicant Extra Fields Report Applicant History List Applicant Labels 2x10 Applicant Labels 2x10 Zip Sort Applicant Labels 2x7 Applicant Labels 2x7 Zip Sort Applicant Labels 3x7 Applicant Labels 3x7 Zip Sort Applicant List Applicant Notes Applicant Summary Applicant Test Notes Applicant Tests Applicant Without Letter Sent Applicant Work History Applicant Work History Notes Applications Interview Form Interview Form Blank Interview Notes Interview Type Notes Interview Types Interviews Phone Letter Position History Reference Notes References Referral Source Reject Letter	Choose Reports >> Human Resources >> Applicant.

Report	**Report type**	**Printing method**
Attendance reports	Accrual Codes Accrual Codes Detail Accrual Schedules Accrual Schedules Detail Attendance Analysis Attendance Average, Percentage Attendance Averages Attendance Detail Attendance Percentage Attendance Summary Attendance Vacation Employee Attendance Detail Employee Attendance Summary	Choose Reports >> Human Resources >> Attendance.
Benefit reports	Beneficiary Information Beneficiary Information (Text) Benefit Copay Basic Benefit Copay Basic (Text) Benefit Copay Setup Benefit Copay Setup (Text) Benefit Copay Signup Benefit Copay Signup (Text) Benefit Dependents Benefit History Detail 1 Benefit History Detail 2 Benefit Letter Benefit Letter Paperwork Benefit Payroll Cash Accounts Setup COBRA Actual Recipients COBRA Balance Statement COBRA Initiate history COBRA Potential Recipients COBRA Qualifying Beneficiaries Compensation Summary Employee FMLA Balances Employee FMLA Balances (Text) Employees on FMLA Employees on FMLA (Text) Health Insurance Setup Investment Setup Report Life Table Retire and Invest Allocations	Choose Reports >> Human Resources >> Benefits.

Report	Report type	Printing method
Discipline reports	Discipline List Discipline Offense Notes Discipline Points for All Discipline Points for Employee Discipline Stage Notes Discipline Summary	Choose Reports >> Human Resources >> Discipline.
EEO reports	Applicant EEO Class Detail Applicant EEO Class Summary Applicant EEO Reports (all) Applicant Position EEO Detail Applicant Position EEO Summary Applicant Req. EEO Detail Applicant Req. EEO Summary EEO 1 Headcount Detail EEO 1 Summary EEO 4 Detail EEO 4 Summary EEO 4 Summary Other EEO Reports (all) EEO Termination Detail EEO Termination Summary	Choose Reports >> Human Resources >> EEO.

Report	Report type	Printing method
Employee reports	Archived Employees Emergency Contacts Employee Address Change Employee Anniversary Employee Birthdays Employee Detail 1 Employee Detail 2 Employee Detail 3 Employee Earnings History Employee Education Employee Education Notes Employee Extra Fields Employee Hire Dates Employee History Employee History Notes Employee List Employee Notes Employee Point In Time Employee Positions Employee Redlined Status Employee Service by Hire Date Employee Skills Employee Summary I-9 Renew List Phone Directory Position Pay Code Linkage Requests for Position Separated Employee Transfer Notes Transfer Requests Vets 100	Choose Reports >> Human Resources >> Employee.
Injury reports	Injury Cost Summary Injury List Injury Notes Injury Notes Page 3 Not Filed Workers' Comp Open Workers' Compensation OSHA 101 OSHA 200 OSHA 200 Case Info OSHA 200 Injury/Illness	Choose Reports >> Human Resources >> Injury.

Report	**Report type**	**Printing method**
Miscellaneous reports	Card Catalog HR Salary Matrix Tables Labels 2x10 Labels 2x10 zip Labels 2x7 Labels 2x7 zip Labels 3x10 Labels 3x10 zip To Do Personal Report To Do Report	Choose Reports >> Human Resources >> Miscellaneous.
Organization reports	Company Extra Fields Report Department Extra Fields Report Department List Department Notes Division Detail Division Extra Fields Reports Division List Division Notes FTE Headcount With Employees FTE Headcount Without Employees Location Detail Location List Organization Tree Position Detail Position Extra Fields Report Position Job Description Position Job Description Text Position List Position Notes Position Salary List Supervisor List Supervisor Notes	Choose Reports >> Human Resources >> Organization.

Report destinations and formats

You can print reports to a printer, the screen, a file, or any combination of these destinations.

- If you print to the printer, the report is printed to your company's default printer, unless the report has been assigned to a specific printer.
- If you print to the screen, the report appears on the screen and you can then choose to print to the printer. In addition, if you're using MAPI

(Microsoft's Mail Application Program Interface), you can e-mail any report that you print to the screen.

- If you print to a file, you can select one of the file formats shown in the following table:

File format	Description
Tab-delimited	The tab-separated ASCII character format used by spreadsheet programs, such as Microsoft Excel.
Comma-delimited	The standard comma-separated ASCII character format used by database programs.
Text file	Text with no formatting. Use this option when the application to which you are converting the document is unable to read any of the other file formats.
HTML file	The format used for publishing information on the World Wide Web. Use this format for information that will be posted on your company's intranet or web page.
Adobe PDF file	This format is available if you have the Acrobat PDFWriter print driver installed. This driver is part of the Acrobat package available from Adobe. PDF (Portable Document Format) files can be read using the Acrobat Reader software available from Adobe.

You can select a printing destination in different ways, depending on which printing method you use.

- If you print a report by choosing File >> Print or the Print button while a window is open, the Report Destination window appears, where you can select a destination. (You can select a preferred default destination—Printer or Screen—in the User Preferences window.)
- For analysis, history and setup reports, you select the destination when you create the report options needed to print these reports.

Processing reports on a process server

Refer to the System Administrator's Guide for more details.

If you are using the Distributed Process Server (DPS), you can choose to process some reports on your computer or send them to a designated process server on the network. Sending long reports to a process server allows you to continue working while the reports are being created. You can select the Human Resources reports you want to process remotely in the DPS Setup window (Setup >> System >> Process Server). You must have the Distributed Process Server registered and set up before you can use this option.

Creating a report option

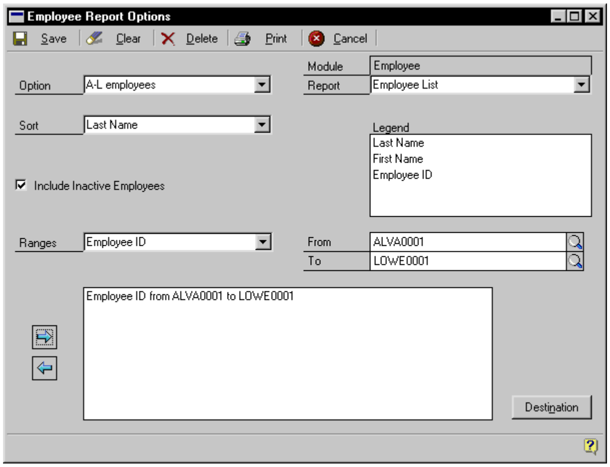
Report options include specifications for sorting options and range restrictions for a particular report. In order to print several Human Resources reports, you must first create a report option. Each report can have several different options so that you can easily print the information you need. For example, you can create report options for the employee list that show either detailed or summary information.

A single report option can't be used by multiple reports. If you want identical options for several reports, you must create them separately.

Use the report options windows to create sorting, restriction and printing options for the reports that have been included with Human Resources.

To create a report option:

1. Open a report options window. There are separate windows for each report type.
   (Reports >> Human Resources >> select a report options window)



Module: Employee
Option: A-L employees
Report: Employee List
Sort: Last Name
Legend: Last Name, First Name, Employee ID
☑ Include Inactive Employees
Ranges: Employee ID
From: ALVA0001
To: LOWE0001

Employee ID from ALVA0001 to LOWE0001

2. Select a report from the Reports list.

For report options window information choose Help >> Index; then enter the name of the specific report options window.

3. Name the option and enter information to define the option. The name you choose for the option won't appear on the report. The selections available for defining report options vary, depending on the report type you've selected.

4. Enter range restrictions. The Ranges list shows the available options for each report. The available ranges vary, depending on the type of report.

You can enter only one restriction for each restriction type. For instance, you can insert one employee ID restriction (ALVA001 to LEVI0001) and one date restriction (01/01/200 to 06/30/2000).

5. Choose Insert to insert the range in the Restrictions List. To remove an existing range from the list, select the range and choose Remove.

6. Choose Destination to select a printing destination. Reports can be printed to the screen, to the printer, to a file or to any combination of these options. If you select Ask Each Time, you can select printing options each time you print this report option.

   Refer to *Printing a report with an option* on page 259 for more information about printing reports.

7. To print the report option from the report options window, choose Print before saving it. If you don't want to print the option now, choose Save and close the window. The report window will be redisplayed.

Printing a report with an option

Use the report options windows to print a report for which a report option has been set up.

To print a report with an option:

1. Open a report options window. There are separate windows for each report type.
   (Reports >> Human Resources >> select a report options window)

2. Select a report from the Reports list.

3. Select a report option and choose Insert to insert the report option in the Print List.

4. Choose Print to print the report options in the Print List.

Customizing a report

Most of the existing reports in Dynamics can be modified to meet your needs. You can add or delete fields, change sorting options, add subtotals or create new custom reports using Report Writer. This procedure describes the simplest method to customize a default report and to set access to it. Refer to Report Writer documentation for detailed instructions about using Report Writer.

To customize a report:

1. Print the report to the screen.

2. While the report is on the screen, choose Tools >> Customize >> Modify Current Report.

   The Report Layout window will appear with the current report open.

3. In the Report Layout window, make any necessary changes to the appearance of the report.

4. Choose Windows >> Report Definition.

5. In the Report Definition window, change the sorting options, modify the report layout or add report restrictions.

6. Choose OK to save the changes to the report.

7. Choose File >> Microsoft Great Plains Dynamics to return to Dynamics.

8. Choose Setup >> System >> Security and select the user, company and product you want to grant access for.

9. In the Type field, select Modified Reports.

10. In the Access List, double-click the name of the report you modified. An asterisk (*) appears, indicating that the selected user has access to the report.

11. Choose OK to save the changes to the user’s security settings.

Part 11: Utilities

This part of the documentation describes how to use Human Resources utilities to maintain your Human Resources information.

The following information is discussed:

Chapter 37, "Human Resources Table Maintenance," describes how to maintain your data in Human Resources.

Chapter 38, "Human Resources Archive," explains how to move inactive applicant and employee records to different tables.

Chapter 39, "Human Resources Mail Merge," describes how to export basic demographics for each applicant or employee—name, address, etc.—to a text file to be incorporated into a mail merge that you use with your regular word-processing software.

Chapter 40, "Compensation Management," explains how to use the Compensation Management window as a tool to analyze and update employee compensation.

Chapter 41, "Desk Accessories," describes how to create a set of records using the Card Catalog window, create entries using the To Do List and Personal To Do List windows and use the Notepad window to keep your notes in one place.

Chapter 37: Human Resources Table Maintenance

Human Resources is designed to ensure maximum accuracy and integrity of your Human Resources data. Occasionally, however, your data tables might become damaged. Hardware failures, power surges and other problems can affect your data by damaging or destroying it. While damage occurs infrequently, the factors that cause it are difficult to predict or control, and it's necessary to take measures to protect your data. The procedures described in this chapter will help you minimize risk of damage to your data and to quickly recover your data from damage if it occurs.

Regularly back up your Human Resources data to minimize risk of data loss from table damage. If you're using a c-tree Plus or Pervasive.SQL database, you can also rebuild your tables.

If you added Human Resources to your Payroll system, you'll need to reconcile information so it appears in both Human Resources and Payroll. For instance, if you defined benefits or deductions in Payroll, you'll need to reconcile the benefits or deductions so they appear in Human Resources.

Always back up your data before you shrink any table. If processing is interrupted. You can use the backup torestore your data to its original condition.

This information is divided into the following sections:

- *Shrinking a Human Resources table*
- *Reconciling Human Resources information*
- *Classifying benefit and deduction codes*

Shrinking a Human Resources table

If you're using a c-tree Plus or Pervasive.SQL database, use the Human Resources File Maintenance window to shrink tables and remove unused space from tables, ensuring that the maximum amount of space is available on your hard disk or network drive.

Do not use this procedure if you're using a Microsoft SQL Server database.

Tables sometimes contain unused space and regularly shrinking them will ensure that you always have as much space available as possible on your hard disk or network drive. Shrinking copies a table, removes any unused space and replaces the original table with the copy. The information in the tables you shrink won't be affected in any way—only the unused space will be removed.

To shrink a Human Resources table:

1. Make a system backup.

2. Check the amount of space available on your hard disk.

   You must have an amount of free space on your hard disk equal to the size of the table you're shrinking.

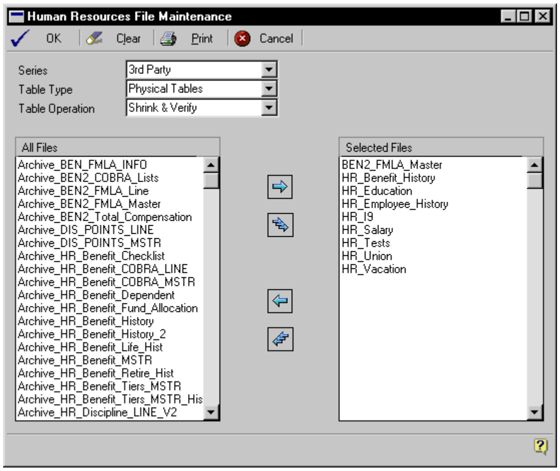
   ⚠ *If you're using a Novell network, you'll need to have free space that equals twice the size of the table you're shrinking.*

   Human Resources tables have three names—a physical name, a display name and a technical name. Since you must check the size of a table at the operating system level, you'll need to know the physical name of the table you want to shrink. Choose Tools >> Resource Descriptions >> Tables to view table descriptions.

3. Be sure that no other users are using Human Resources while you are shrinking tables.

   To view which users are in the Human Resources system and where, choose Setup >> System >> User Activity.

4. Open the Human Resources File Maintenance window.
   (File >> Maintenance >> HR File Maintenance)



Series: 3rd Party
Table Type: Physical Tables
Table Operation: Shrink & Verify

All Files
Archive_BEN_FMLA_INFO
Archive_BEN2_COBRA_Lists
Archive_BEN2_FMLA_Line
Archive_BEN2_FMLA_Master
Archive_BEN2_Total_Compensation
Archive_DIS_POINTS_LINE
Archive_DIS_POINTS_MSTR
Archive_HR_Benefit_Checklist
Archive_HR_Benefit_COBRA_LINE
Archive_HR_Benefit_COBRA_MSTR
Archive_HR_Benefit_Dependent
Archive_HR_Benefit_Fund_Allocation
Archive_HR_Benefit_History
Archive_HR_Benefit_History_2
Archive_HR_Benefit_Life_Hist
Archive_HR_Benefit_MSTR
Archive_HR_Benefit_Retire_Hist
Archive_HR_Benefit_Tiers_MSTR
Archive_HR_Benefit_Tiers_MSTR_His
Archive_HR_Discipline_LINE_V2

Selected Files
BEN2_FMLA_Master
HR_Benefit_History
HR_Education
HR_Employee_History
HR_I9
HR_Salary
HR_Tests
HR_Union
HR_Vacation

5. Select the series and table type.

6. Select a table operation.

7. Select the file(s) to shrink from All Files and choose the insert icon button to move the file to Selected Files. To remove files from Selected Files, choose the remove icon button.

8. Choose OK.

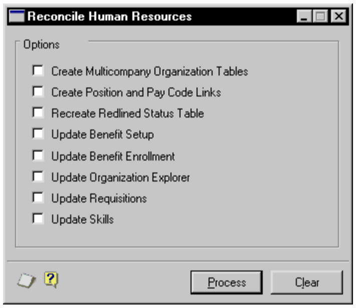
   The File Maintenance Report will be printed upon the completion of the shrinking procedure.

Reconciling Human Resources information

Use the Reconcile Human Resources window to create information links and updates benefit information, skill information and organization information.

To reconcile Human Resources information:

1. Open the Reconcile Human Resources window.
   (Utilities >> Human Resources >> Reconcile)



Reconcile Human Resources

Options

☐ Create Multicompany Organization Tables
☐ Create Position and Pay Code Links
☐ Recreate Redlined Status Table
☐ Update Benefit Setup
☐ Update Benefit Enrollment
☐ Update Organization Explorer
☐ Update Requisitions
☐ Update Skills

2. Mark the options to process. Each option and its process is described in the following table.

Option	**Process**
Create Multicompany Organization Tables	Mark to create organization information for each company.
Create Position and Pay Code Links	Mark to create links between all position codes and pay codes.
Recreate Redlined Status Table	Mark to update the redline status file and create a list of employee records that don't comply with the salary matrix guidelines.
Update Benefit Setup	Mark to update Human Resources benefit setup information using Payroll benefit setup information.
Update Benefit Enrollment	Mark to update Human Resources benefit enrollment information using Payroll benefit enrollment information.
Update Organization Explorer	Mark to update the organizational structure information.
Update Requisitions	Mark to update the Applicants Applied field in the Requisitions window.
Update Skills	Mark to update skills.

3. Choose Process.

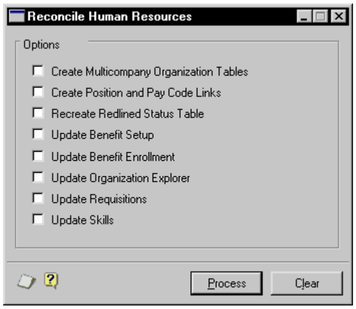
4. When the process is completed, the Reconcile Error Report will be printed.

Classifying benefit and deduction codes

Use the Benefit Classification window to assign a Human Resources benefits classification to Payroll benefit and deduction codes. If you defined benefits or deductions in Payroll, you'll need to reconcile and classify the benefits or deductions so they appear in Human Resources.

To classify benefit and deduction codes:

1. Open the Reconcile Human Resources window.
   (Utilities >> Human Resources >> Reconcile)


Reconcile Human Resources
Options
☐ Create Multicompany Organization Tables
☐ Create Position and Pay Code Links
☐ Recreate Redlined Status Table
☐ Update Benefit Setup
☐ Update Benefit Enrollment
☐ Update Organization Explorer
☐ Update Requisitions
☐ Update Skills
Process
Clear

2. Mark Update Benefit Setup and choose Process. If benefit codes or deduction codes exist in Payroll but not Human Resources, the Benefit Classification window will open.

   If no errors are found, the Report Destination window will be displayed and you can print the Reconcile Error Report.

3. If the Benefit Classification window opens, select an HR Benefit Classification for each code and choose OK to classify the benefits.

   If you don't classify all benefits and deductions, the code will continue to appear in the Benefit Classification window.

Chapter 38: Human Resources Archive

In Human Resources, it's a good idea to periodically archive—or move—some of the information in your system to a separate, or secondary, file system. By reducing the number of active, readily-accessible records, your system will run more efficiently.

Use the Applicant Archive and Employee Archive windows to move inactive applicant and employee records to a separate area on your computer. You can then save the archived records to a different storage medium to reduce the amount of hard disk space required for the system.

You also can choose to delete the records as they are archived and specify what information will be part of the archived record. You can recall archived records to reactivate applicant and employee records. Further, if you later decide to delete certain applicant or employee records from your archive, you can do so.

To archive Human Resources records, you'll use the Applicant Archive and Employee Archive windows.

This information is divided into the following sections:

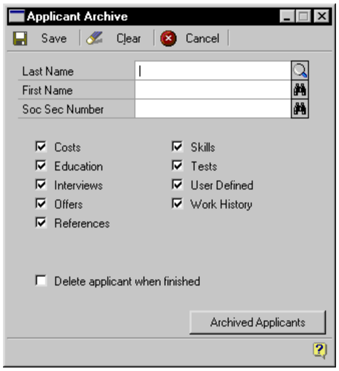
- *Archiving an applicant record*
- *Retrieving an archived applicant record*
- *Archiving an employee record*
- *Retrieving an archived employee record*
- *Deleting an employee record*

Archiving an applicant record

Use the Applicant Archive window to archive and keep a history of applicant records. You also can delete the applicant record from this window.

To archive an applicant record:

1. Open the Applicant Archive window.
   (Utilities >> Human Resources >> Archive Applicant)


Applicant Archive
Save
Clear
Cancel
Last Name
First Name
Soc Sec Number
Archived Applicants

☑ Costs
☑ Education
☑ Interviews
☑ Offers
☑ References
☑ Skills
☑ Tests
☑ User Defined
☑ Work History

☐ Delete applicant when finished

2. Enter or select the applicant last name.

3. Mark the records for this applicant to archive.

4. To delete the applicant record from the list of active applicants, mark Delete applicant when finished.

5. Choose Save.

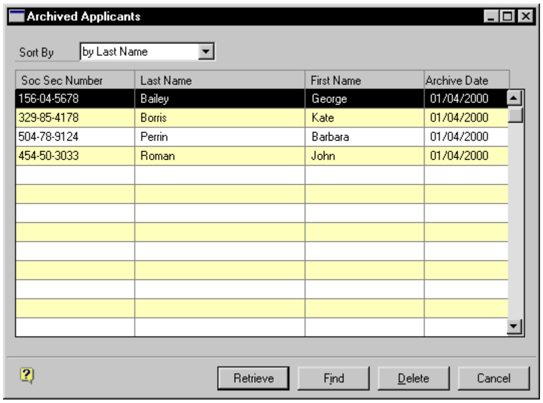
Retrieving an archived applicant record

Use the Archived Applicant window to retrieve an archived record. You might want to retrieve an applicant record if the applicant reapplies for a position within your company.

To retrieve an archived applicant record:

1. Open the Applicant Archive window.
   (Utilities >> Human Resources >> Archive Applicant)

2. Choose Archived Applicants. A list of archived records will be displayed in the Archived Applicants window.



Sort By: by Last Name

Soc Sec Number	Last Name	First Name	Archive Date
156-04-5678	Bailey	George	01/04/2000
329-85-4178	Borris	Kate	01/04/2000
504-78-9124	Perrin	Barbara	01/04/2000
454-50-3033	Roman	John	01/04/2000

3. Highlight the applicant record to retrieve and choose Retrieve.

4. A message will be displayed and you'll have the option to retrieve this applicant's record. Choose Yes.

5. When the retrieval process is complete, you'll have the option to delete the archived records after retrieving.

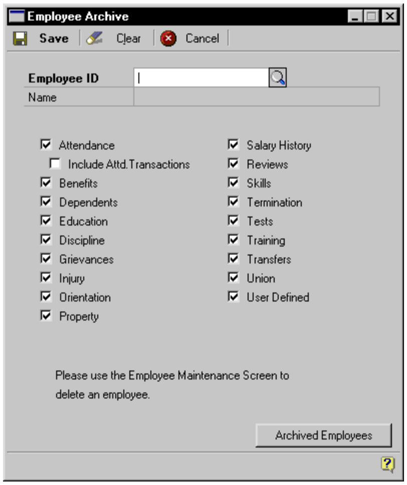
6. Close the Applicant Archive window.

Archiving an employee record

Use the Employee Archive window to archive and keep history of an employee record. To delete that employee record from the employee table, you must delete the employee record from the Employee Maintenance window after archiving it. For more information about deleting an employee record after archiving the record, refer to *Deleting an employee record* on page 274.

To archive an employee record:

1. Open the Employee Archive window.
   (Utilities >> Human Resources >> Archive Employee)



☑ Attendance
☐ Include Attd.Transactions
☑ Benefits
☑ Dependents
☑ Education
☑ Discipline
☑ Grievances
☑ Injury
☑ Orientation
☑ Property
☑ Salary History
☑ Reviews
☑ Skills
☑ Termination
☑ Tests
☑ Training
☑ Transfers
☑ Union
☑ User Defined

Please use the Employee Maintenance Screen to delete an employee.

2. Enter or select an employee ID.

3. Mark the records of this employee to archive.

   If you mark Attendance and don't Include Attd. Transaction, employee maintenance information and yearly accrual summary information for the employee will be archived. If you mark Include Attd. Transactions, all the transactions for this employee will be archived. You must mark Attendance if you want to mark Include Attd. Transactions.

4. Choose Save.

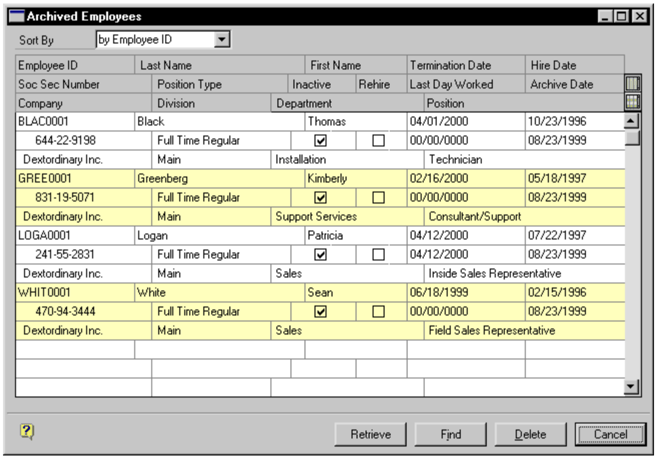
Retrieving an archived employee record

Use the Archived Employee window to retrieve an archived record. You might want to retrieve an archived employee record if the employee begins working at your company again.

To retrieve an archived employee record:

1. Open the Employee Archive window.
   (Utilities >> Human Resources >> Archive Employee)

2. Choose Archived Employees. A list of archived records will be displayed in the Archived Employees window.



Sort By: by Employee ID

Employee ID	Last Name	First Name		Termination Date	Hire Date
Soc Sec Number	Position Type	Inactive	Rehire	Last Day Worked	Archive Date
Company	Division	Department		Position	
BLAC0001	Black	Thomas		04/01/2000	10/23/1996
644-22-9198	Full Time Regular	☑	☐	00/00/0000	08/23/1999
Dextordinary Inc.	Main	Installation		Technician	
GREE0001	Greenberg	Kimberly		02/16/2000	05/18/1997
831-19-5071	Full Time Regular	☑	☐	00/00/0000	08/23/1999
Dextordinary Inc.	Main	Support Services		Consultant/Support	
LOGA0001	Logan	Patricia		04/12/2000	07/22/1997
241-55-2831	Full Time Regular	☑	☐	04/12/2000	08/23/1999
Dextordinary Inc.	Main	Sales		Inside Sales Representative	
WHIT0001	White	Sean		06/18/1999	02/15/1996
470-94-3444	Full Time Regular	☑	☐	00/00/0000	08/23/1999
Dextordinary Inc.	Main	Sales		Field Sales Representative	

3. Highlight an employee record and choose Retrieve.

4. A message will be displayed and you'll have the option to retrieve this employee's records.

5. When the retrieval process is complete, you'll have the option to delete the employee's archived records.

Only records previously archived can be retrieved. Additional records, such as Payroll information and benefit signups must be synchronized and some data might need to be entered. Use the Reconcile Human Resources window to update benefit signups. For more information, refer to Reconciling Human Resources information on page 265.

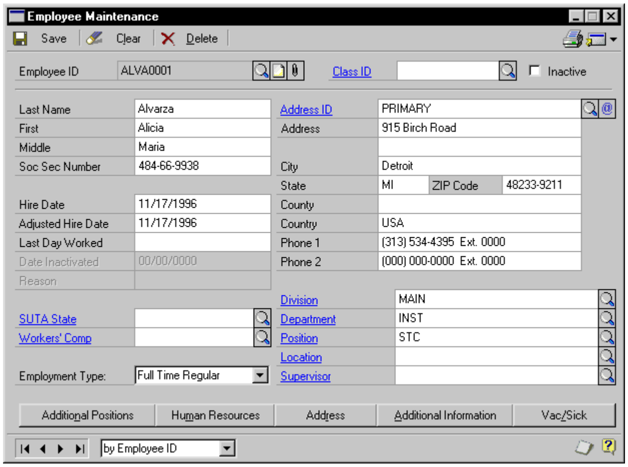
6. Close the Employee Archive window.

Deleting an employee record

Use the Employee Maintenance window to delete an employee record after you archive employee information. If information such as monthly, quarterly or yearly records exist for an employee, you can't delete the employee record. You can delete the record at the end of the year after you have cleared financial information.

To delete an employee record:

1. Open the Employee Maintenance window.
   (Cards >> Human Resources >> Employee >> Employee)


Employee Maintenance
Save
Clear
Delete
Additional Positions
Human Resources
Address
Additional Information
Vac/Sick

Employee ID: ALVA0001
Class ID:
☐ Inactive
Last Name: Alvarza
First: Alicia
Middle: Maria
Soc Sec Number: 484-66-9938
Hire Date: 11/17/1996
Adjusted Hire Date: 11/17/1996
Last Day Worked:
Date Inactivated: 00/00/0000
Reason:
SUTA State:
Workers' Comp:
Employment Type: Full Time Regular
Address ID: PRIMARY
Address: 915 Birch Road
City: Detroit
State: MI
ZIP Code: 48233-9211
County:
Country: USA
Phone 1: (313) 534-4395 Ext. 0000
Phone 2: (000) 000-0000 Ext. 0000
Division: MAIN
Department: INST
Position: STC
Location:
Supervisor:
by Employee ID

2. Enter or select an employee ID.

3. Choose Delete.

Chapter 39: Human Resources Mail Merge

Use the Applicant Mail Merge and Employee Mail Merge windows to automate mass mailings. You can export the basic demographic information for each applicant or employee, such as name, address and phone numbers, to a text file and then use that file in a mail merge with your regular word-processing software.

⚠ *The Human Resources mail merge process does not utilize any mail program. It creates a text file to be used with a word processing software mail merge process.*

This information is divided into the following sections:

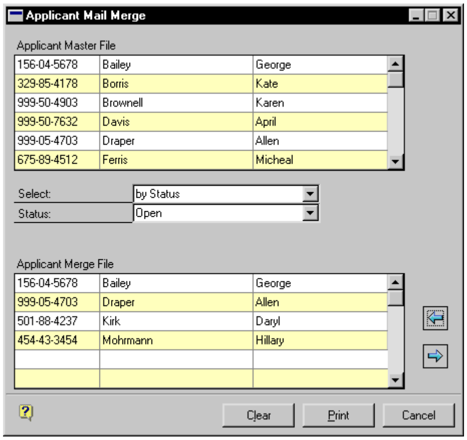
- *Creating an applicant mail merge file*
- *Creating an employee mail merge file*

Creating an applicant mail merge file

Use the Applicant Mail Merge window to create a mail merge file from applicant records. You might use a mail merge with applicant names and addresses to send letters to applicants when your company has received their applications.

To create an applicant mail merge file:

1. Open the Applicant Mail Merge window.
   (Utilities >> Human Resources >> Mail Merge Applicant)



Applicant Master File

156-04-5678	Bailey	George
329-85-4178	Borris	Kate
999-50-4903	Brownell	Karen
999-50-7632	Davis	April
999-05-4703	Draper	Allen
675-89-4512	Ferris	Micheal

Select: by Status
Status: Open

Applicant Merge File

156-04-5678	Bailey	George
999-05-4703	Draper	Allen
501-88-4237	Kirk	Daryl
454-43-3454	Mohrmann	Hillary

2. Select a sorting option for applicant information.
   - To select individual applicant names, select by Applicant and highlight an applicant name from the Applicant Master File list to include in the mail merge.
   - To select a group of applicant names with a common status, select by Status and select the applicant status for the records to include in the mail merge.
   - To select a group of applicant names with a common date of application, select by Apply Date and enter or select the range of application dates for the records to include in the mail merge.
   - To include all applicant names, select All Applicants.
3. Choose the insert icon button.
4. To remove an applicant name from the Applicant Merge File window, highlight the applicant name and choose the remove icon button.
5. Choose Print. The Enter the Mail Merge file window will open.
6. Select the folder to save the file in, enter a file name and select the type of file to create.
7. Choose Save to create the file.

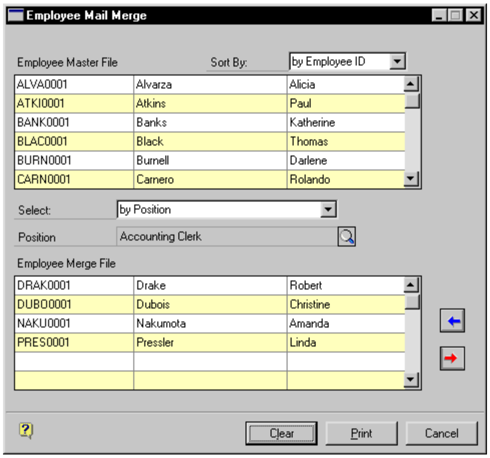
   Refer to the documentation for your word processing program to include this file in a mail merge.

Creating an employee mail merge file

Use the Employee Mail Merge window to create a mail merge file using employee records. You might use a mail merge to send a letter to a group of employees in a specific department. You can chose to include inactive employee records in the mail merge.

To create an employee mail merge file:

1. Open the Employee Mail Merge window.
   (Utilities >> Human Resources >> Mail Merge Employee)



Employee Master File

Sort By: by Employee ID

ALVA0001	Alvarza	Alicia
ATKI0001	Atkins	Paul
BANK0001	Banks	Katherine
BLAC0001	Black	Thomas
BURN0001	Burnell	Darlene
CARN0001	Carnero	Rolando

Select: by Position

Position: Accounting Clerk

Employee Merge File

DRAK0001	Drake	Robert
DUBO0001	Dubois	Christine
NAKU0001	Nakumota	Amanda
PRES0001	Pressler	Linda

2. Select a sorting option for employee information.

   - To select individual employee IDs, select by Employee and then highlight an employee ID from the Employee Master File list to include in the mail merge.

   - To select a group of employee IDs with a common division, department or position, select by Division, by Department or by Position and select the division, department or position of the employee records to include in the mail merge.

   - To include all employee IDs, select All Employees.

3. Choose the insert icon button.

4. A message will appear and you'll have the option to include inactive employee records. Choose Yes to include inactive employee records in your mail merge file; choose No to exclude inactive employee records.

5. To remove an employee ID from the Employee Merge File window, highlight the employee ID and choose the remove icon button.

6. Choose Print. The Enter the Mail Merge file window will open.

7. Select the folder to save the file in, enter a file name and select the type of file to create.

8. Choose Save to create the file.

   Refer to the documentation for your word processing program to include this file in a mail merge.

Chapter 40: Compensation Management

Use the Compensation Management window as a tool to analyze and update employee compensation. You can choose individual employee names or groups of employee names for compensation adjustments and analyze percentage or dollar amount changes.

After you’ve analyzed the compensation change, you can update the compensation for the employee names selected. You also can view the employee’s division, department, position, shift code, previous wage and proposed wage.

Use the Compensation Statistics window to view the current average employee salary, the proposed average employee salary and the difference between the current and proposed averages salaries.

This information is divided into the following sections:

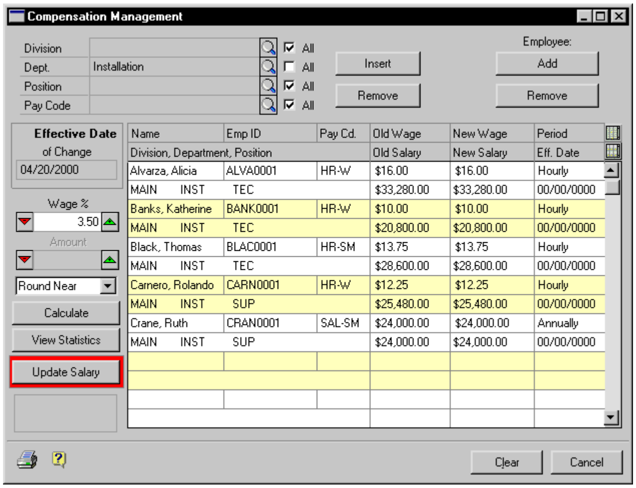
- *Analyzing and updating employee compensation*
- *Viewing compensation statistics*

Analyzing and updating employee compensation

Use the Compensation Management window to analyze employee compensation by entering compensation increases or decreases and applying them to certain employee records or employee groups.

To analyze and update employee compensation:

1. Open the Compensation Management window.
   (Utilities >> Human Resources >> Compensation Mgmt)



Compensation Management

Division ☑ All
Dept. Installation ☐ All
Position ☑ All
Pay Code ☑ All

Effective Date of Change 04/20/2000

Wage % 3.50

Amount

Round Near

Name	Emp ID	Pay Cd.	Old Wage	New Wage	Period
Division, Department, Position			Old Salary	New Salary	Eff. Date
Alvarza, Alicia	ALVA0001	HR-W	$16.00	$16.00	Hourly
MAIN INST TEC			$33,280.00	$33,280.00	00/00/0000
Banks, Katherine	BANK0001	HR-W	$10.00	$10.00	Hourly
MAIN INST TEC			$20,800.00	$20,800.00	00/00/0000
Black, Thomas	BLAC0001	HR-SM	$13.75	$13.75	Hourly
MAIN INST TEC			$28,600.00	$28,600.00	00/00/0000
Carnero, Rolando	CARN0001	HR-W	$12.25	$12.25	Hourly
MAIN INST SUP			$25,480.00	$25,480.00	00/00/0000
Crane, Ruth	CRAN0001	SAL-SM	$24,000.00	$24,000.00	Annually
MAIN INST SUP			$24,000.00	$24,000.00	00/00/0000

2. Enter the Effective Date of change or accept the default date.

3. Choose the employees you want to include in the wage analysis.

   To include all the employee names from a particular group, select a Division, Department or Position and Pay Code and mark All next to the group you selected. For example, suppose you want to perform a wage analysis for all production workers in all departments. Select the Production Worker position and mark All next to Department.

4. Choose Insert to add the employee names to the scrolling window. A message will appear and you'll have the option to include Part Time Employees.

5. To add an individual employee name to the scrolling window, choose Add to open the Employees window. Highlight an employee name and choose Select.

6. To remove a group of employee names from the scrolling window, choose Remove. For example, suppose you are considering a wage increase for employees in all departments in your East Division, except Engineering. Add all employees in the East Division and then remove the Engineering employees.

7. To remove an individual employee name from the Compensation Management scrolling window, highlight the employee name and choose Remove. You can remove the pay code selected or all pay codes for this employee.

8. Enter wage adjustment information.

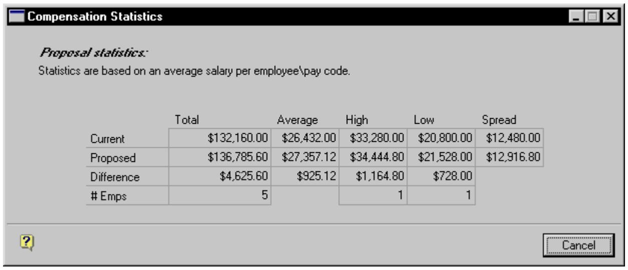
   - To adjust wages by a percentage, enter the amount in the Wage % field. You can use the arrow buttons to change the amount.

   - To adjust wages by a dollar amount, enter the amount in the $ Amount field. You can use the arrow buttons to change the amount.

   - Select Round Near, Round Up or Round Down to round the wage adjustment up, down or to the nearest percent or dollar.

9. Choose Calculate. The new employee salaries for the employees in the scrolling window will be calculated.

   To view calculated salary statistics, choose View Statistics to open the Compensation Statistics window. For more information about viewing compensation statistics, refer to *Viewing compensation statistics* on page 282.



Proposal statistics:

Statistics are based on an average salary per employee\pay code.

	Total	Average	High	Low	Spread
Current	$132,160.00	$26,432.00	$33,280.00	$20,800.00	$12,480.00
Proposed	$136,785.60	$27,357.12	$34,444.80	$21,528.00	$12,916.80
Difference	$4,625.60	$925.12	$1,164.80	$728.00	
# Emps	5		1	1	

10. Choose File >> Print to print the HRP Compensation Summary report.

11. Close the Compensation Statistics window. Choose Update Salary in the Compensation Management window to update employee salary information using the information in the Compensation Statistics window. The employee salary records displayed will be updated.

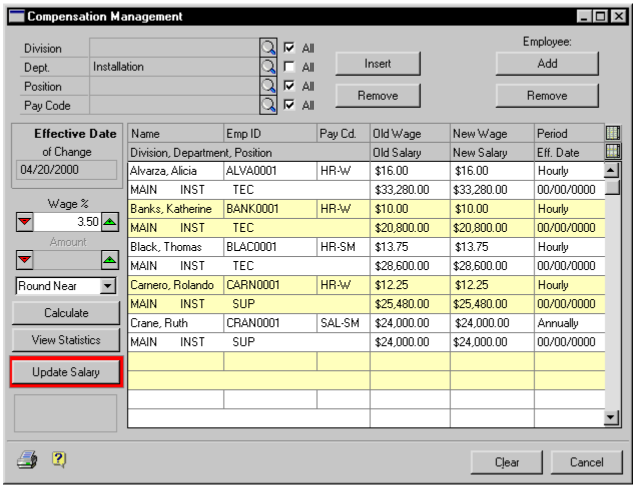
Changes made to employee salary history records using this procedure will display "COMP MGMT" as the reason for change.

Viewing compensation statistics

Use the Compensation Statistics window to view how compensation changes will affect different organizational groups. Usually, you'll want to choose one pay code to analyze.

To view compensation statistics:

1. Open the Compensation Management window.
(Utilities >> Human Resources >> Compensation Mgmt)



Division ☑ All
Dept. Installation ☐ All
Position ☑ All
Pay Code ☑ All

Effective Date of Change 04/20/2000

Wage % 3.50

Round Near

Name	Emp ID	Pay Cd.	Old Wage	New Wage	Period
Division, Department, Position			Old Salary	New Salary	Eff. Date
Alvarza, Alicia	ALVA0001	HR-W	$16.00	$16.00	Hourly
MAIN INST TEC			$33,280.00	$33,280.00	00/00/0000
Banks, Katherine	BANK0001	HR-W	$10.00	$10.00	Hourly
MAIN INST TEC			$20,800.00	$20,800.00	00/00/0000
Black, Thomas	BLAC0001	HR-SM	$13.75	$13.75	Hourly
MAIN INST TEC			$28,600.00	$28,600.00	00/00/0000
Carnero, Rolando	CARN0001	HR-W	$12.25	$12.25	Hourly
MAIN INST SUP			$25,480.00	$25,480.00	00/00/0000
Crane, Ruth	CRAN0001	SAL-SM	$24,000.00	$24,000.00	Annually
MAIN INST SUP			$24,000.00	$24,000.00	00/00/0000

2. Follow the instructions for *Analyzing and updating employee compensation* on page 279 to enter and calculate a wage analysis.

3. Choose View Statistics to open the Compensation Statistics window. The system calculates both the current and proposed average, high, and low salary figures for everyone in the part of the system you chose. The total change and the difference between current and proposed wages and salaries are displayed. You also can see how many employees are included in the information for each level.

Chapter 41: Desk Accessories

For an easy way to access addresses and phone numbers for other companies and business contacts you can create a set of records using the Card Catalog window.

To remember important dates, such as employee review dates and employee benefit eligibility dates, you can create entries using the To Do List and Personal To Do List windows.

You can use the Notepad window to keep your notes in one place.

This information is divided into the following sections:

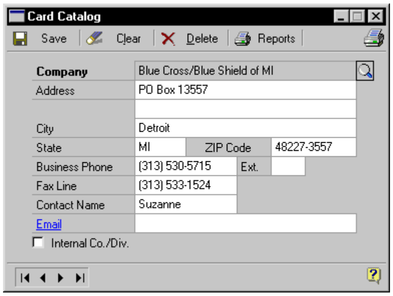
- *Creating a card catalog record*
- *Viewing to do list entries*
- *Creating a to do list entry*
- *Changing or deleting a to do list entry*
- *Viewing personal to do list entries*
- *Creating a personal to do list entry*
- *Changing or deleting a personal to do list entry*
- *Creating or deleting a notepad entry*

Creating a card catalog record

Use the Card Catalog window as an address book to enter and store address and contact information for companies that your company does business with, such as insurance carriers.

To create a card catalog record:

1. Open the Card Catalog window.
   (Cards >> Human Resources >> Miscellaneous >> Card Catalog)



Company Blue Cross/Blue Shield of MI
Address PO Box 13557
City Detroit
State MI ZIP Code 48227-3557
Business Phone (313) 530-5715 Ext.
Fax Line (313) 533-1524
Contact Name Suzanne
Email
☐ Internal Co./Div.

2. Enter or select a name that identifies the company.

3. Enter the address, city, state and postal code.

4. Enter a phone number, fax number and contact person at the company.

5. Enter an e-mail address.

6. Mark Internal Co./Div. if this entry is for an internal company or division.

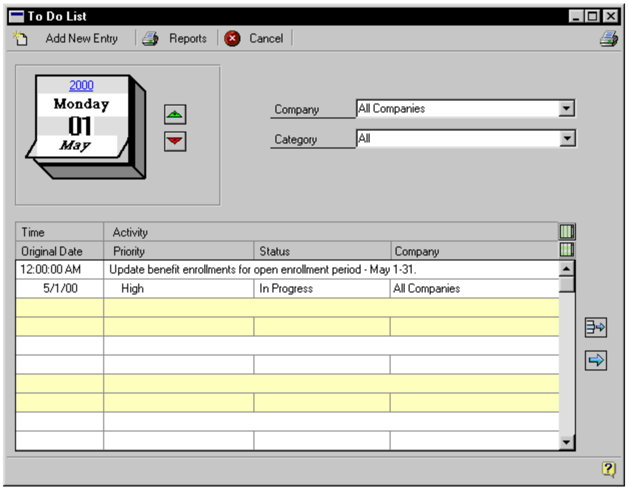
7. Choose Save.

Viewing to do list entries

Use the to do list window to view calendar information, such as employee benefit eligibility dates, employee review dates and orientation dates. You can view information by company and category.

To view to do list entries:

1. Open the To Do List window.
   (Cards >> Human Resources >> Miscellaneous >> To Do)



Company: All Companies
Category: All

Time	Activity		
Original Date	Priority	Status	Company
12:00:00 AM	Update benefit enrollments for open enrollment period - May 1-31.		
5/1/00	High	In Progress	All Companies

2. Select a company and a category to view.

3. Use the up icon button to view future dates and use the down icon button to view previous dates, or select the Date to open the Date lookup window.

4. Choose the hide and show buttons to view additional information.

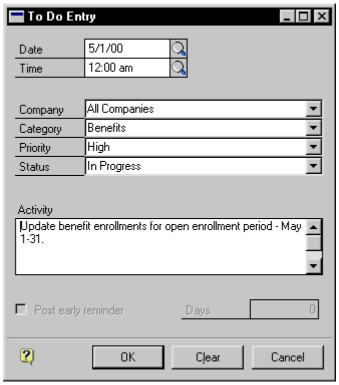
Creating a to do list entry

Use the To Do Entry window to enter calendar activities, such as applicant interview dates, skill expiration dates and property due dates. You also can post an early reminder for activities.

To create a to do list entry:

1. Open the To Do List window.
   (Cards >> Human Resources >> Miscellaneous >> To Do)

2. Choose Add New Entry to open the To Do Entry window.



Date 5/1/00
Time 12:00 am
Company All Companies
Category Benefits
Priority High
Status In Progress
Activity
Update benefit enrollments for open enrollment period - May 1-31.
☐ Post early reminder
Days 0

3. Enter or select a date and a time for the entry.

4. Select a company and category for the entry.

5. Select a priority and status for the entry.

6. Enter a description in the Activity field.

7. Mark Post early reminder and enter the number of days before the activity is due to have a reminder displayed.

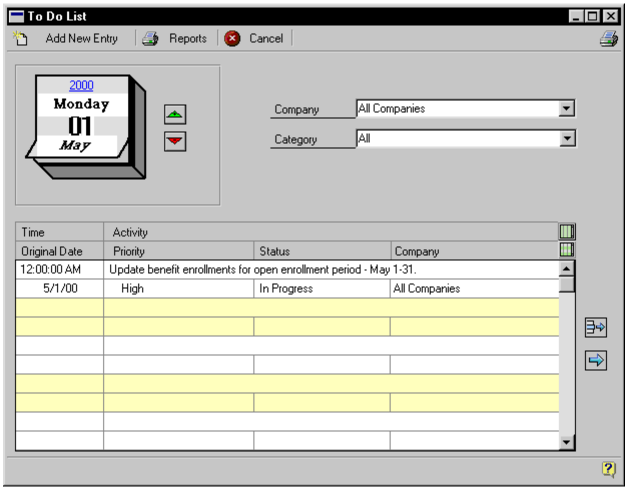
8. Choose OK to save your changes.

Changing or deleting a to do list entry

Use the To Do List window to change or delete a to do list entry. You can change the date the activity is due and the status. You also can delete an entry.

To change or delete a to do list entry:

1. Open the To Do List window.
   (Cards >> Human Resources >> Miscellaneous >> To Do)



Company: All Companies
Category: All

Time	Activity		
Original Date	Priority	Status	Company
12:00:00 AM	Update benefit enrollments for open enrollment period - May 1-31.		
5/1/00	High	In Progress	All Companies

2. Select a company and a category to view.

3. Use the up icon button to view later dates and use the down icon button to view earlier dates.

4. To change an entry, select an activity in the scrolling window and choose the select icon button. Make your changes and choose OK.

5. To delete an entry, select an activity in the scrolling window and choose the delete icon button.

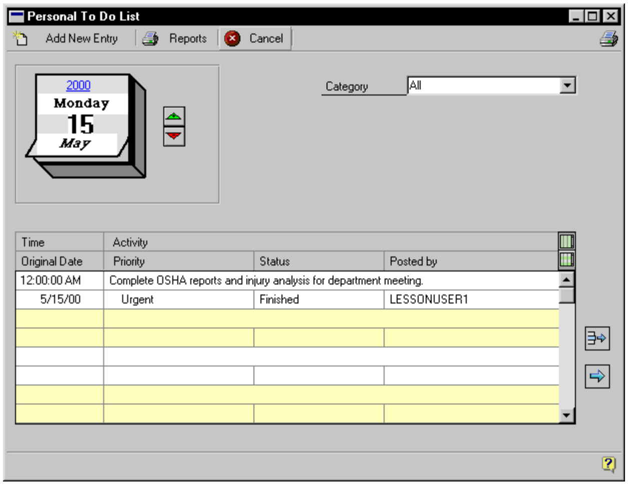
6. Close the window.

Viewing personal to do list entries

Use the Personal To Do List window to view your calendar information, such as applicant interview dates, employee review dates and orientation dates. You can view your information by category.

To view personal to do list entries:

1. Open the Personal To Do List window.
   (Cards >> Human Resources >> Miscellaneous >> To Do Personal)



Category: All

Time	Activity		
Original Date	Priority	Status	Posted by
12:00:00 AM	Complete OSHA reports and injury analysis for department meeting.		
5/15/00	Urgent	Finished	LESSONUSER1

2. Select a category to view.

3. Use the up arrow icon button to view future dates and use the down arrow icon button to view previous dates.

4. Choose the hide and show buttons to view additional information.

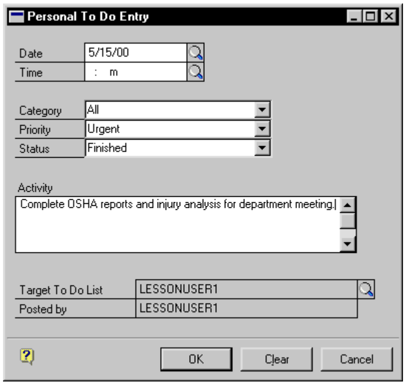
Creating a personal to do list entry

Use the Personal To Do Entry window to enter calendar activities, such as applicant interview dates, skill expiration dates and property due dates. You also can post an early reminder for activities and assign entries to other users. Personal To Do List entries can be created only for the company you’re logged in to.

To create a personal to do list entry:

1. Open the Personal To Do List window.
   (Cards >> Human Resources >> Miscellaneous >> To Do Personal)

2. Choose Add New Entry to open the Personal To Do Entry window.



Date 5/15/00
Time : m
Category All
Priority Urgent
Status Finished
Activity
Complete OSHA reports and injury analysis for department meeting.
Target To Do List LESSONUSER1
Posted by LESSONUSER1

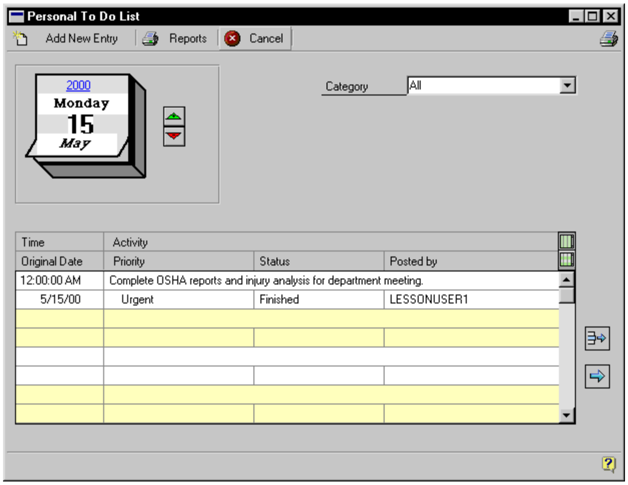
3. Enter or select a date and a time for the entry.
4. Select a category for the entry.
5. Select a priority and status for the entry.
6. Enter a description of the to do entry in the Activity field.
7. Enter or select a user ID in the Target To Do List to create an entry in that user’s personal to do list.
8. Choose OK to save your changes.

Changing or deleting a personal to do list entry

Use the Personal To Do List window to change or delete an entry in your personal To Do List. You can change the date the activity is due and the status. You also can delete an entry.

To change or delete a personal to do list entry:

1. Open the Personal To Do List window.
   (Cards >> Human Resources >> Miscellaneous >> To Do Personal)



2000
Monday
15
May

Category: All

Time	Activity		
Original Date	Priority	Status	Posted by
12:00:00 AM	Complete OSHA reports and injury analysis for department meeting.		
5/15/00	Urgent	Finished	LESSONUSER1

2. Select a category to view.

3. Use the up arrow icon button to view future dates and use the down arrow icon button to view previous dates.

4. To change an entry, select an activity in the scrolling window and choose the select icon button.

5. To delete an entry, select an activity in the scrolling window and choose the delete icon button.

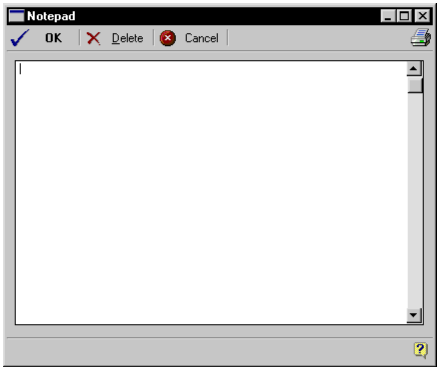
6. Close the window.

Creating or deleting a notepad entry

Use the Notepad window to create or delete a notepad entry. You can use it as a working area to keep notes in one place.

To create or delete a notepad entry:

1. Open the Notepad window.
   (Cards >> Human Resources >> Miscellaneous >> Notepad)



2. Enter the information.

3. Choose the print icon button to print the notepad information.

4. Choose OK to save the information.

5. To delete a notepad entry, choose Delete.

6. To change information, enter new text or highlight the text to delete and choose the DELETE key.

Glossary

ADA
The Americans with Disabilities Act prohibits the discrimination against qualified individuals with a disability.

Adjusted hire date
An arbitrary hire date used to base employee time lines—such as reviews or benefits.

Americans with Disabilities Act
See ADA.

Applicant
A person who has provided a resume or job application for employment with your company.

Backing up
The process of storing data on a secondary medium, usually diskettes or magnetic tape, in order to minimize the difficulty of recovering from data loss. Backups should be created frequently.

Batch
A group of transactions identified by a unique name or number. Batches are used to conveniently group transactions, both for identification purposes and to speed the posting process.

Beneficiary
A person who benefits from a Human Resources benefit.

Benefit
A contribution provided by the company that can be calculated on net, unit or gross pay. Examples of benefits include insurance premiums and 401(k) contributions.

Cash account
An account to which an employee can make contributions for some other specified purpose, such as charitable contributions.

Class
A particular training session in which a course is taught. For example, Class PC might be How to use your personal computer.

COBRA
The Consolidated Omnibus Reconciliation Act of 1985 is a federal law protecting employees that are no longer with the company by allowing them to maintain insurance while they aren't working.

Compa-ratio
The employee's pay rate divided by the middle value of the salary matrix linked to the employee's position.

Company
A business organization.

Company data
The information you enter about your organization, such as its applicants, employees, benefits systems, training programs and organizational structure.

Consolidated Omnibus Reconciliation Act of 1985
See COBRA.

Copayment
The amount of money that must be paid by an employee in cooperation with a benefit. For example, a health insurance benefit might have a $10 copayment.

Course
A general education subject, taught in specific classes. For example, course Computers might include the class How to use your PC.

Deduction
An amount withheld from an employee's net, unit or gross pay. For example, a donation to a charity could be set up as a deduction.

Default
A value that is displayed in a window automatically and will be used unless you enter a different value.

Default data
Information that has been provided as a starting point in working with software. In Human Resources, for example, some orientation and termination checklists have been provided for you.

Department
A category or functional part of a business, usually charged with a specific task within the business, such as Sales, Engineering or Purchasing.

Dependent
An individual who relies on another for some type of support, usually a child.

Division
An organizational level of a company. Divisions can be based on geography, (East Division, West Division); product specializations, (New Technologies Division); or any other characteristic.

EEO
The Equal Employment Opportunity legislation bans the discrimination of qualified individuals, based on their sex, age, religion or ethnic origin.

Employee
A person who works for your company and receives payment for work performed.

Equal Employment Opportunity/ Affirmative Action
See EEO.

Fair Labor Standards Act
See FLSA status.

Family and Medical Leave Act
See FMLA.

FLSA status
The Fair Labor Standards Act is a federal labor law that covers overtime, minimum wages, child labor protections, and the equal pay act.

FMLA
The Family and Medical Leave Act applies to organizations of 50 or more employees, with some exceptions. Under its provisions, employees are allowed to take up to 12 weeks of leave from their jobs for certain family- or medical-related situations. When the employee returns to work, he or she is guaranteed the same job or an equivalent one.

Grievance
A complaint brought against a company by an employee. In Human Resources, any employee—including those that are not union employees—may file a grievance.

Hazardous communications/ right-to-know
OSHA-required training for employees who will be working with hazardous or potentially hazardous materials.

Help
Documentation of Human Resources features placed online for quick access. Also referred to as online documentation.

Highly compensated
An Internal Revenue Service term for employees who have ownership of the company over and above a set percentage, and/or compensation over a certain dollar amount. Consult your benefits administrator for more information.

Hire
To agree to bring an applicant into the organization as an employee. (In Human Resources with Integration to Payroll, the “hire” process also includes other related tasks, such as assigning the new employee an employee ID number and transferring applicant records to employee records.)

I-9 form
The U.S. Department of Justice Immigration and Naturalization Service Employment Eligibility Verification form. This form, required by the U.S. government, must be kept on file for every employee within an organization, to verify eligibility for employment in the United States.

Inactivate
The process of making employee records inactive. If you inactivate an employee record, all of the employee’s pay, deduction and benefit records will be inactivated, and paychecks will no longer be printed for the individual.

Increment buttons
Small red and green buttons with up and down arrows on them. Use increment buttons to adjust a number displayed in a text field. Choose the up button to increase the number. Choose the down button to decrease the number.

Inquiry
A Human Resources feature that allows you to review open-year and historical information.

Interview
A meeting between representatives of an organization and a potential employee. The purpose of most interviews is to evaluate the applicant as a candidate for employment with the organization.

Location
A work site. Some businesses are organized as a single company or division, but may have multiple sites.

Note
A feature that is used to attach messages to windows and records. The note button shows whether a note is attached to a window. Notes can be edited and reattached, deleted or printed.

Occupational Safety and Health Administration
See OSHA.

Offer
A statement made by an organization outlining the circumstances under which it would hire an applicant. Offers routinely include details about positions, duties, pay and benefits packages.

Operating procedure (OP)
A criteria, regulation or policy that guides an organization in its day-to-day routine. Typically, organizations have OPs for attendance, vacation time, dress codes, reviews and so on.

Option
A printing specification set up for reports. A variety of options can be used with each report.

Orientation
A period of initial training for new employees, to help them learn the policies and practices of the organization and their roles.

OSHA
The Occupational Safety and Health Administration is a United States governmental agency responsible for ensuring safety standards for businesses in the United States.

OSHA 101
A Supplementary Record of Occupational Injuries and Illnesses form required by the government to record the specific information for a given employee injury or illness. This report must be kept on the premises for a minimum of five years.

OSHA 200
A Log and Summary of Occupational Injuries and Illnesses form required by the government to record all occupational-related injuries and illnesses. This report must be kept on the premises for a minimum of five calendar years after an incident is reported.

Password
A combination of distinct characters assigned to a particular user or group of users. You can use passwords to control access to specific fields.

Pay code
A code used to identify a specific type and rate of pay. For example, an employee who is paid a salary might have the pay code SAL assigned to him or her.

Pay period
The time period between regularly scheduled pay runs.

Points system
A system for tracking employee disciplinary measures. In some organizations, employees are assigned a specific number of points, and infractions can result in the removal of points. More severe infractions might result in the loss of more points.

Position
A defined role within an organization.

Posting
An internal announcement that a position is open and that internal candidates can apply for the position.

Preferences
Adjustments you can make to your software so it works more efficiently for you. There are two types of preferences—user preferences, which are tied to a particular login and are effective whenever that login is used, and system preferences, which affect all the Human Resources users in your organization.

Query
In Human Resources, a query is a search of applicant or employee skills records for specific skills.

Range
A selection used to narrow the number and kinds of records printed on a report. For example, a selected range of employees could be those in a specific department.

Record
A collection of related computer datum. One applicant's information—from Interviews to Work History to References—is the applicant's record.

Reference
A statement of an applicant's suitability for a position. References are usually supplied by former employers or teachers.

Report option
A collection of entries that specify the amount of information or the type of information that appears on a report. Multiple report options can be created.

Requisition
A formal request to hire an employee for a specific position within the organization.

Review
A formal examination of an employee's work.

Salary matrix
A spreadsheet-type record of pay levels within an organization. Companies that use labor grades, and set pay levels for for those grades, customarily store that information in a salary matrix.

Select icon button
A small button with a red arrow. Use the select icon button to choose the highlighted text, usually in a scrolling window or lookup window.

Scrolling window
A window within a window. A scrolling window contains lists of selections.

Skill
The ability to proficiently perform certain tasks or duties.

Skill set
A group of related skills.

Sorting
A method of arranging data based on the order of specified information. For example, records sorted by document list all items on a document before listing the items on the next document.

Supervisor
An employee who oversees the work of others.

Termination
An employee's exit from an organization, whether voluntary or not.

Transfer
A move from one shift or position to another.

Union
A labor organization that represents the workers in a particular industry.

User-defined field
Fields that you can define to track information specific to your business.

User-defined window
A window created by the user to track information specific to your business.

W-4 form
An employee withholding form required by the Internal Revenue Service.

Index

A

- absence entry
  - creating 105
  - deleting 106
  - modifying 106
- Absence Entry window 106
- absences
  - adjusting entries 105
  - deleting entries 105
- Accrue Transactions window 102
- accruing attendance hours 102
- Acrobat manuals, accessing 5
- additional resources 5
- analyzing employee compensation 279
- applicant
  - adding 18
  - costs 12
  - deleting 19
  - deleting applications 20
  - education 25
  - extra fields 21
  - hiring 44
  - interview scoring 41
  - interviews 40
  - mail merge 275
  - modifying 19
  - modifying applications 20
  - multiple applications 19
  - offers 42
  - references 28
  - requisitions 9
  - skills 31
  - tests 36
  - user defined 22
  - user-defined report 24
  - work history 26
- Applicant / Requisition Inquiry window 12
- Applicant Archive window 270
- Applicant Education window 25
- Applicant Extra Fields window 21
- Applicant Interview Rating window 40
- Applicant Mail Merge window 275
- Applicant Offers window 42
- applicant records, retrieving archived records 270
- Applicant Skills window 32
- Applicant Test window 37
- Applicant User Defined window 23
- Applicant window 18, 20
- Applicant Work History window 27
- Archived Applicants window 271
- Archived Employees window 273
- archiving
  - applicant records 269
  - employee records 271
  - retrieving an archived applicant record 270
  - retrieving an archived employee record 272
- Attendance Employee Maintenance window 92
- Attendance Employee Summary window 94
- attendance records
  - adding 91
  - deleting 93
  - inactivating 93
  - transferring to payroll 111
- Attendance Transaction Entry window 98, 100, 104
- Attendance Transaction Transfer Log window 113
- Attendance Transaction Transfer window 111
- attendance transactions
  - accruing hours 102
  - adjusting 101
  - adjusting absence entries 105
  - adjusting available hours 98
  - creating 99
  - creating absence entries 103
  - deleting 101
  - deleting absence entries 105
  - entering beginning balances 98
  - transferring to payroll 111
  - viewing transactions posted to payroll 112
- awards, discipline 196

B

- beneficiaries 126
- benefit codes, classifying 267
- benefit copayment, setting up 295
- benefit definitions 117
- benefit enrollment 118
  - cash account 124
  - completing 128
  - health insurance 119
  - life insurance 121
  - retirement plan 123
  - tiers 126
- benefit history 152
  - creating 151
  - deleting 152
  - modifying 152
- Benefit History Lookup window 151
- benefit records, reconciling 265
- benefit tiers 123
- benefits 117
  - cash accounts 124
  - COBRA 141
  - eligibility date 120
  - FMLA 131
  - health insurance 119
  - history 152
  - life insurance 121
  - retirement plans 123
  - summary 149
  - tiers 126
  - viewing 149, 249
- benefits summary information, importing 159
- Benefits/Deductions Checklist window 118
- Benefits/Deductions Overview window 250
- Benefits/Deductions Summary window 150

C

- calendar
  - vacation 108
  - vacation planning 104
- Card Catalog window 286
- cash accounts 124, benefits 124

cash accounts 124 (*continued*), garnishments 124
Cash Accounts Enrollment window 125
Class Enrollment window 189
classifying benefit codes 267
classifying deduction codes 267
COBRA
  benefits 141
  Consolidated Omnibus Reconciliation Act of 1985 141
  generating a letter 141
  initiating benefits 142
  tracking payments 146
  tracking premiums 144
COBRA Premiums and Payments window 145, 146
COBRA Recipients List window 142
COBRA window 143
combined history, viewing 247
Combined History window 248
company Internet information, setting up 58
company records, reconciling 265
compa-ratio 84
Compensation Management window 280, 282
compensation report 155
compensation statistics, viewing 282
Compensation Statistics window 281
Consolidated Omnibus Reconciliation Act of 1985 (COBRA) 141
context-sensitive help, accessing 5
copayment, setting up 295
Costs window 13
Create New Entry window 235

D

data, importing 159
deduction codes, classifying 267
deduction enrollment, completing 128
deductions
  summary 149
  viewing 149, 249
deleting employee records 274
dental insurance, enrollment 119
dependents 71
discipline
  adding a record 193
  adjusting points 196
  closing a record 196
  deleting a record 196
  deleting points 196
  modifying a record 195
  points system 196
Discipline Entry window 194
Discipline Point System window 196
discipline records 193
Discipline Stage Detail window 195
documentation, symbols and conventions 3

E

earnings history 245
  changing a record 220
  deleting a record 220
  viewing a record 220
Earnings History window 220
education
  deleting a record 168
  employee 167
  modifying a record 168
Education window 167
e-mailing, reports 257
Employee Additional Information Maintenance window 56
Employee Address Maintenance window 57
Employee Archive window 272
Employee Beneficiaries window 127
employee compensation
  analyzing 279
  updating 279
Employee Contacts window 61
Employee Dependents window 71
employee education, adding 167
employee expenses, cash accounts 124
Employee Extra Fields window 78
employee history
  changing an employee's position 54
  deleting an employee's positions 62
  viewing 247
employee history (*continued*), viewing an employee's positions 62
Employee Human Resources Maintenance window 59
Employee Injury - Additional Information window 213
Employee Injury - Treatment Information window 212
Employee Injury window 210, 215
Employee Inquiry window 246
employee leave, FMLA 132, 134
Employee Mail Merge window 277
Employee Maintenance window 50, 52, 274
Employee Pay Code HR Maintenance window 83, 84
Employee Pay Code Maintenance window 84, 86
Employee Positions Detail window 64
Employee Positions History window 65
Employee Positions window 63
employee records
  adding 50
  adding additional addresses 57
  adding additional information 56
  adding human resources information 59
  archiving 271
  assigning property 73
  beneficiaries 126
  contacts 60
  creating 235
  deleting 274
  dependents 71
  education 167
  extra fields 78
  I-9 68
  inactivating 52
  mail merge 276
  modifying human resources information 60
  photo 65
  property 73
  reactivating 53
  retrieving archived records 272

employee records (*continued*)
  returning property 74
  union 75
  user-defined 79
  vacancies 234
  viewing information 245
Employee Review - Additional Information window 205
Employee Review window 204, 207
employee reviews 203
employee skills
  adjusting a record 170
  assigning 169
  removing a record 170
Employee Skills window 170
Employee Tests window 175
Employee Training window 184, 188
Employee Transfer Request window 225
employee transfers 237
Employee User Defined window 79, 81
exit interview, adding a record 228
Exit Interview window 229
explorer, organization explorer 233

F

Family and Medical Leave Act (FMLA) 131
fields, on reports 251
file formats, reports 257
file maintenance 264
file maintenance report 265
file space, shrinking tables 263
FMLA
  adjusting a payment 138
  adjusting a premium 138
  adjusting employee leave 134
  benefits 131
  deleting a payment 138
  deleting a premium 138
  entering a payment 137
  entering premiums due 136
  initiating employee leave 132
  limitations 131
  viewing information 135
FMLA Information window 135
FMLA Initiation window 133, 139
FMLA Premiums and Payments window 137, 138

G

garnishment, cash accounts 124
grievance records
  adding 199
  deleting 201
  modifying 201
grievance stages 201
  adding 201
  deleting 201
Grievances window 200

H

health insurance
  dental 119
  enrollment 119
  medical 119
  vision 119
Health Insurance Enrollment window 119
help
  accessing online help 5
  contents 5
Hire window 44
hiring an applicant 44
history records
  benefits 152
  combined history 245
  employee history 245
hours
  adjusting available hours 98
  entering beginning balances 98
Human Resources File Maintenance window 265
Human Resources reports 251

I

I-9 form 68
I-9 Form window 68
icons, used in manual 3
illness
  adding a record 209
  adding additional information 213
  adding treatment information 211
  deleting a record 215
illustrations, reports 251
Incomplete Enrollment Codes window 128
injury
  adding a record 209
  adding additional information 213
  adding treatment information 211
  cost information 214
  deleting a record 215
  worker’s compensation 209
Injury Costs window 214
inquiry, employee 245
Insert Object window 66
insurance
  health 119
  life insurance 121
  medical 119
  retirement 123
Internet information, setting up 58
Internet Information window 58
interviews 40

L

life insurance
  benefit enrollment 121
  benefits 121
Life Insurance Enrollment window 121

M

mail merge
  applicant 275, 276
  creating a file 275, 276
mailing, reports 257
manuals, online manuals 5
mass mailings, mail merge 275, 276
matrix
  redline status 248
  salaries 239
medical costs, injury 214
medical insurance, enrollment 119

N

names, report technical names 251
navigation, symbols used for 3
Notepad window 293

O

Occupational Safety and Health Administration 209

OLE Container window 66
online help
    accessing 5
    contents 5
online manuals, accessing 5
online sample reports
    accessing 5
    using 251
operating procedures, viewing 246
Operating Procedures window 247
options
    creating a report option 258
    printing with a report option 259
Options window 161
organization, viewing information 233
organization explorer, vacancies 234
Organization Explorer window 234, 236, 237
organization records, reconciling 265
orientation
    adding a record 179
    completing a checklist 181
    deleting a record 181
    modifying a record 181
Orientation Checklist window 180
OSHA (Occupational Safety and Health Administration) 209

P

pay
    decreases 279
    increases 279
payments, COBRA premiums 144
PDF manuals, accessing 5
Personal To Do Entry window 291
Personal To Do List window 290, 292
points system, employee discipline 196
position history 245
    adding a record 221
    deleting a record 222
    modifying a record 222
    viewing a record 222
Position History Detail window 221
Position History window 223
position vacancies 234
positions, requisitions 238
premiums, FMLA 136
printing, default report destinations 257
Process Server 257
product support, obtaining 5
property 73
    assigning 73
    returning 74
Property window 73, 74

Q

Query Results window 35, 173
querying employee skills 171

R

Reactivate Employee window 53
Reason for Change window 55
Reconcile Human Resources window 266, 267
reconciling Human Resources information 265
redlined status, viewing information 248
Redlined Status window 249
references 28
References window 28
reports
    accessing sample reports 5
    creating options 258
    e-mailing with MAPI 257
    file formats 257
    Human Resources reports 251
    illustrations 251
    options
        creating 258
        printing with a report option 259
    printing
        default destinations 257
        destinations 257
        to a file 256
        to a printer 256
        to the screen 256
    Process Server 257
    restricting 258
    sample 251
    sorting 258
requisitions, adding 9
requisitions (*continued*)
    costs 12
    creating 238
    deleting 11
    modifying 11
    viewing applicants 11
    viewing total costs 14
Requisitions window 10, 238
resources, documentation 5
retirement plans
    benefits 123
    enrollment 123
Retirement Plans Enrollment window illustration 123
retrieving applicant records 270, 273
reviews 203
    adding a record 203
    deleting a record 207
    entering additional information 205
    modifying a record 207
    using numbers 206
    using word sets 204
rewards, discipline 196

S

salary decreases 279
salary increases 279
salary matrix
    adding 239
    deleting 241
    modifying 241
    redlined status 248
    updating 241
Salary Matrix Update window 242
Salary Matrix window 240
salary updates 279
sample reports
    accessing 5
    using 251
scoring interviews 41
services, offered by Great Plains 5
shrinking, tables 264
skill records, reconciling 265
skills
    applicant 31
    creating a query 33

skills (*continued*)
    employee 169
    sub-query 35
Skills Query window 34, 36, 172, 174
skills sub-query, creating 173
spreadsheet data, importing 157
sub-query, creating 173
support, obtaining 5
symbols, used in manual 3

T

table maintenance 264
tables
    shrinking 264
    used by specific reports 251
technical names, reports 251
technical support, obtaining 5
termination
    adding a record 227
    completing a record 230
    deleting a record 229
    modifying a record 229
Termination Checklist window 228
tests
    applicant 36
    creating a record 175
    deleting a record 176
    employee 175
    modifying a record 176
tiers, benefit enrollment 123
time codes
    benefit 103
    viewing balances 94
To Do Entry window 288
To Do List, benefit eligibility date 120
To Do List window 287, 289
total compensation information, importing 159
total compensation/benefits summary report
    clearing 162
    creating 160
    defining 155
Total Compensation/Benefits Summary window 156, 159, 163
Total Costs window 14
training
    class lists 185, 187
    completing a training class 187
    viewing class enrollment 188
Training Batch Signup window 186
transactions, *see* attendance transactions
transfer request
    adding a record 225
    deleting a record 226
    modifying a record 226
transfers, employee positions 237

U

union 75
union dues, cash accounts 124
Union window 75
user-defined
    applicant records 22
    employee records 79
user-defined report, printing 80

V

vacancies
    changing the number of vacancies 234
    creating a vacancy 234
    employee records 235
    organization explorer 234
    transferring employees 237
Vacancy Maintenance window 235
vacation calendar, viewing employee information 108
Vacation Calendar window 108
vision insurance, enrollment 119

W

word processing data, importing 158
word sets, employee reviews 203
work history, applicant 26
worker’s compensation, injury 209

Documentation Comment Form

Microsoft Great Plains Human Resources People Management Guide

May 2001

The Microsoft Great Plains Documentation Team welcomes your comments and suggestions regarding the quality and usefulness of this manual. Your comments help us improve the documentation to better meet your needs.

- Did you find any errors?
- Is the information clearly presented?
- Are the examples correct? Do you need more examples?
- What features do you like most about the manual? What features do you like least?

If you find errors or have specific suggestions, please note the topic, chapter and page number.

____

____

____

____

____

Send your comments to:

Global Documentation Team
Microsoft Great Plains Business Solutions
One Lone Tree Road
Fargo, ND 58104-3911

You can also e-mail your comments to: **doccomments@greatplains.com**

Thank you for taking the time to help us improve the documentation for Microsoft Great Plains Human Resources.