Evolution®
Advanced HR

Evolution Advanced HR User Guide

End User Version

Contents

Document Revision History

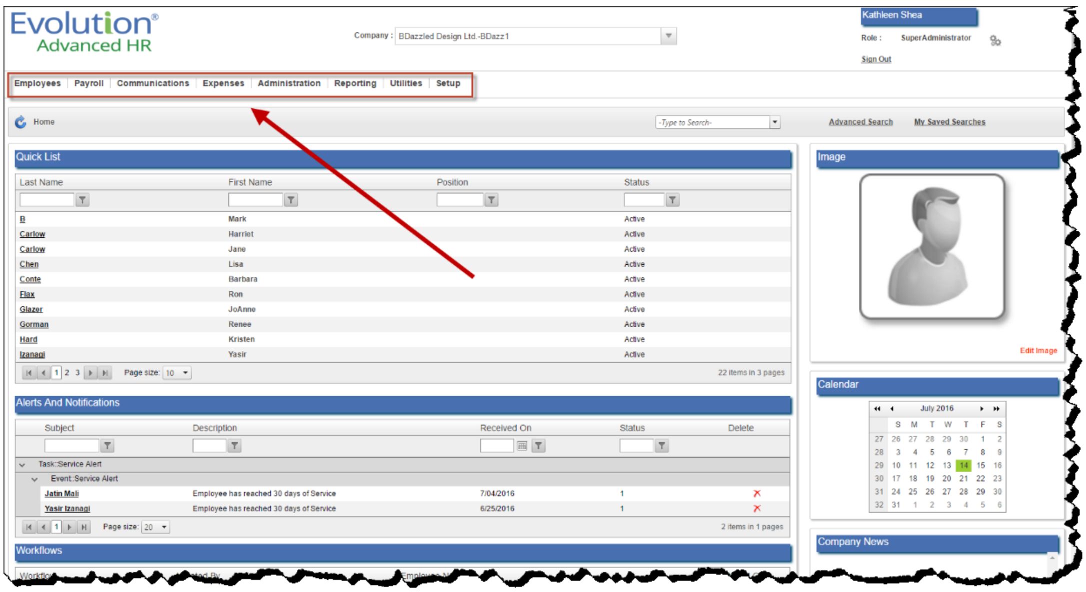
Doc Version	Software Version	Date	Description
1.0	1.3	6/10/2016	Created this document as a subset of the Advanced HR User Guide – Service Bureau. This End User version contains end user information only, it does not contain the configuration and setup information found in the Service Bureau version of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

Advanced HR - Overview

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

Chapter 1: Navigating Advanced HR & the Home page

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



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

Horizontal menu items

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

Employees | Payroll | Communications | Expenses | Administration | Reporting | Utilities | Setup

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

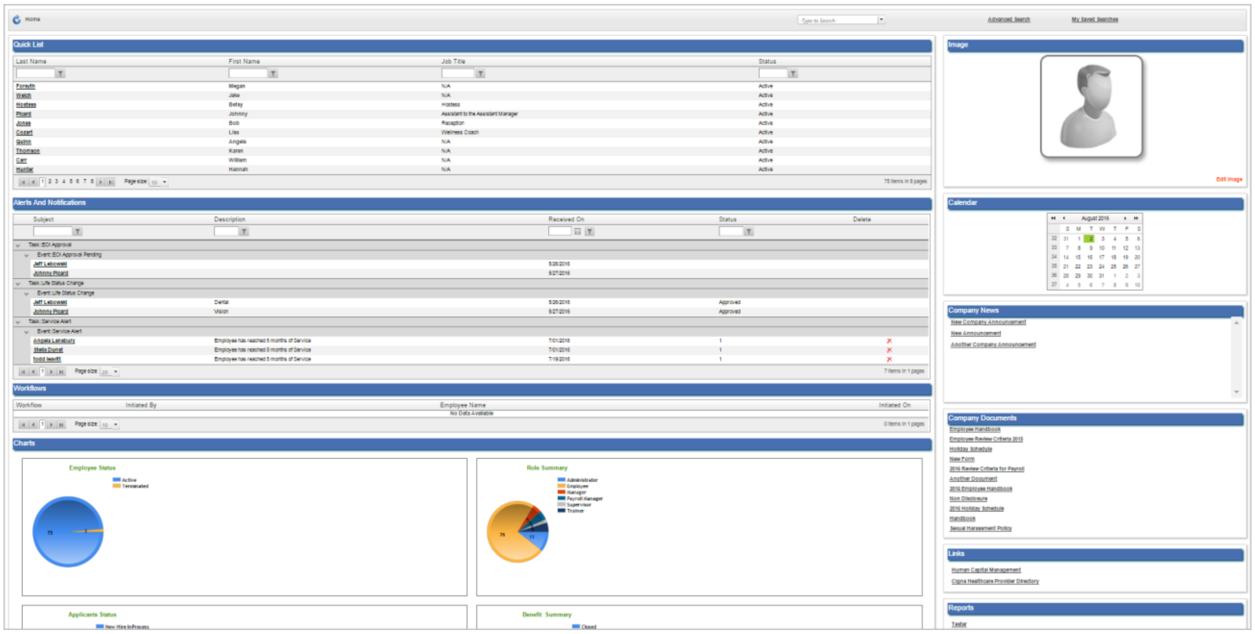
Menu	Description
Administration	Access job requisitions, add new hires, benefits, job profiles, position management, recruiting, onboarding profiles, training, etc. For administrators & super administrators roles. Automate your onboarding process. Send automated notices to new hires and have them complete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

Home Page sections

The Home page in Advanced HR contains various sections:

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

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



Image

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

To upload an image:

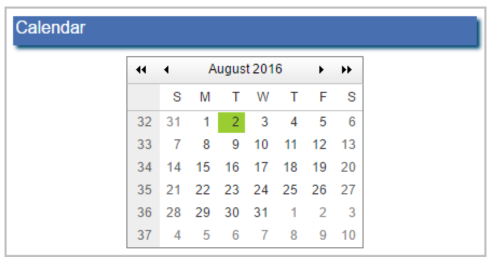
1. Click on the **Edit Image** link in the **Image** section of the Home page.

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

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

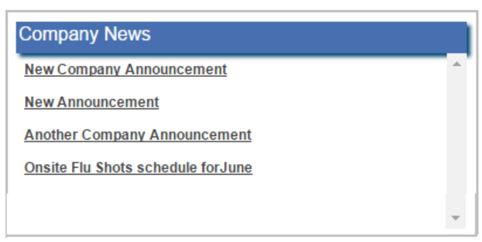
Calendar

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

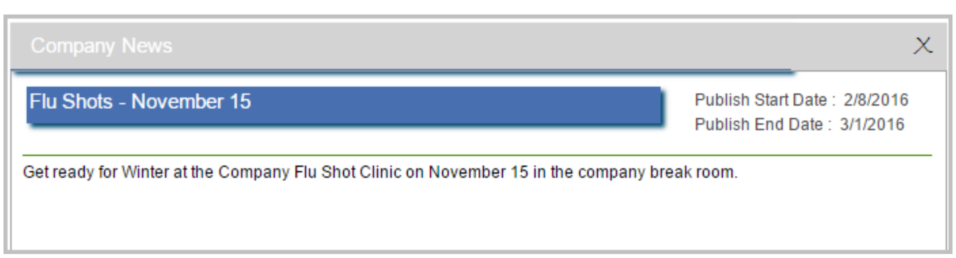


Company News

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



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



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

Company Documents

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

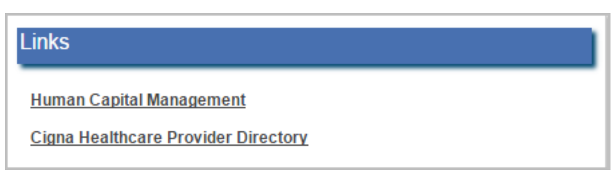
Company documents display on the **Company Documents** section of the Home page; they also appear in the Company Documents section of the Employee Portal. Users with proper access (if applicable) can then click on the document link in the **Company Documents** section of the Home page to display the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

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

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

Links

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

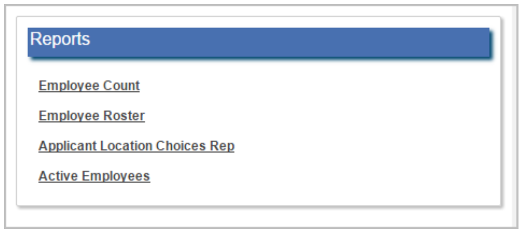


The users click on the link to go to that website address (URL).
Users with the proper security can configure any number of links that will all appear on the Home page, in the Links section.

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

Reports

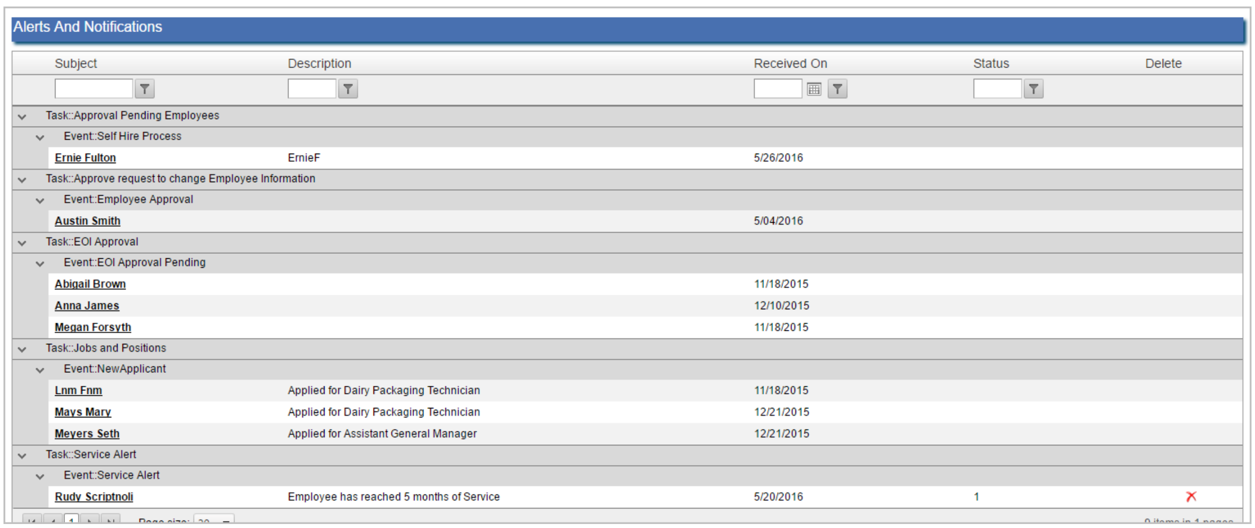
The **Reports** section of the Home page provides links to the user of any reports that they have recently accessed.



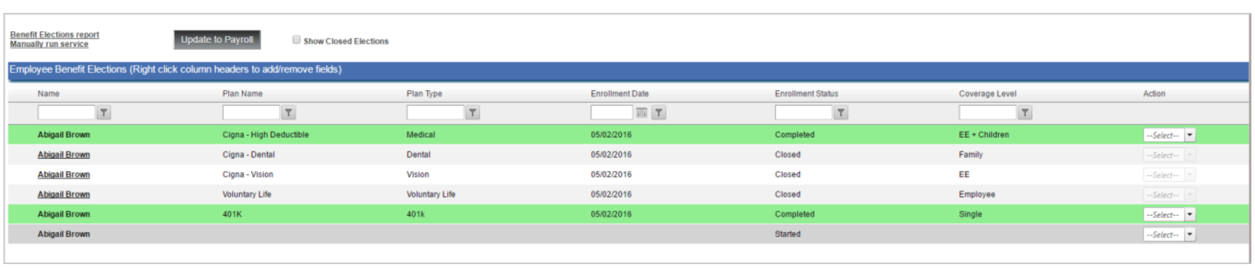
Users can click on a report link here for a shortcut link to reports to which they frequently refer.

Alerts and Notifications

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



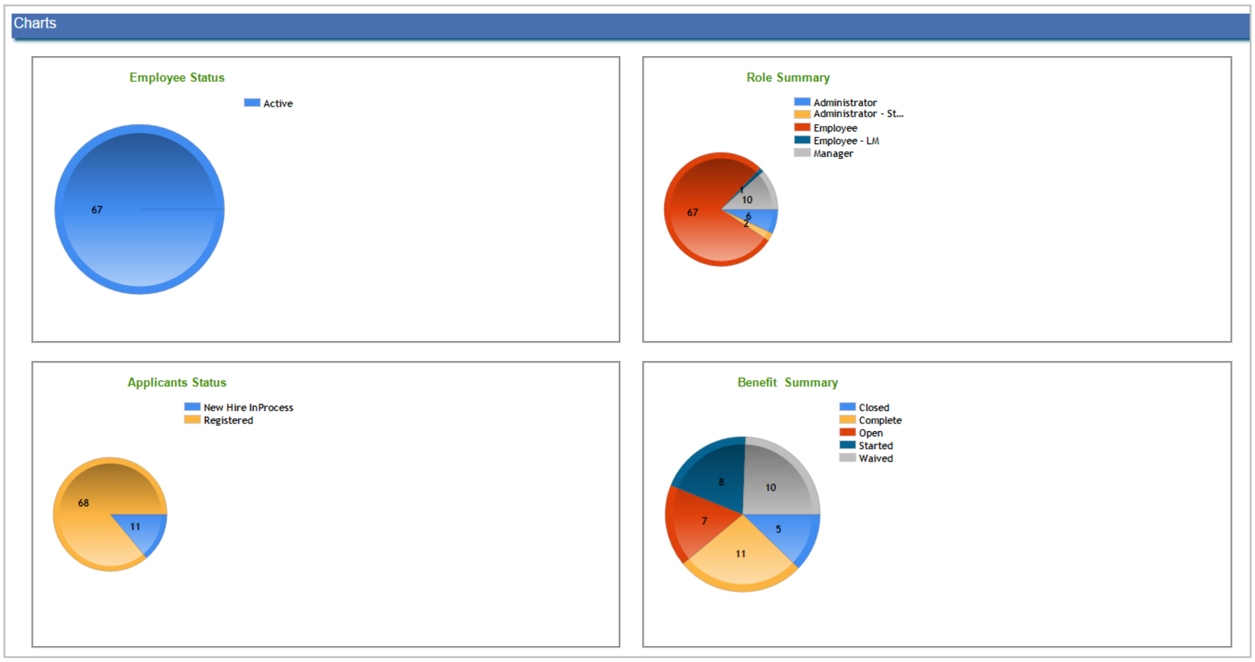
Users clicking on an alert/notification are taken to the corresponding screen, such as Employee Benefit Election approval shown below.



Charts

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

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



Moving between Advanced HR and the Port

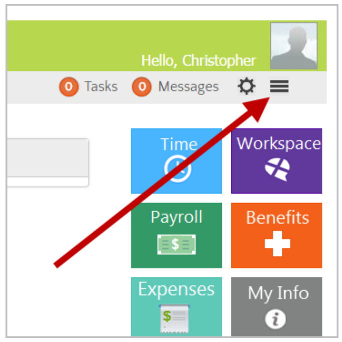
Users with the proper security can easily switch between Advanced HR and the Employee Portal (The Port) by clicking the icons on the upper right of the screen, as shown below.

Navigating from Advanced HR to the Employee Portal

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

Navigating from the Employee Portal to Advanced HR

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



Save before navigating elsewhere

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

Logging out of Advanced HR

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

Chapter 2: Employee Maintenance

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

Employee menu items

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

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

Finding employees

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

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

Employee List

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

Employee List

Username	SSN	Emp ID	Last Name	First Name	Job Title	Status
SophieAllan	330-55-3222	15	Allan	Sophie	N/A	Active
RobertAlsop	330-55-3214	7	Alsop	Robert	N/A	Active
JessicaBlack	443-27-6329	36	Black	Jessica	N/A	Active
AnneBlake	330-55-3223	16	Blake	Anne	N/A	Active
Harriette_Blaker	330-55-3227	20	Blaker	Harriette	N/A	Active
AbigailBrown	443-27-6316	23	Brown	Abigail	N/A	Active
NathanBrown	330-55-3215	8	Brown	Nathan	N/A	Active
FaithBuckland	443-27-6327	34	Buckland	Faith	N/A	Active
SueBuckland	443-27-6318	25	Buckland	Sue	N/A	Active
UnaCarr	443-27-6328	35	Carr	Una	N/A	Active
WilliamCarr	330-55-3220	13	Carr	William	N/A	Active
DianeChapman	443-27-6332	39	Chapman	Diane	N/A	Active
StephanieClark	443-27-6321	28	Clark	Stephanie	N/A	Active
LaurenClarkson	453-64-3579	47	Clarkson	Lauren	N/A	Active
PhilCornish	453-64-3577	45	Cornish	Phil	N/A	Active
ChristopherDavies	453-64-3575	43	Davies	Christopher	N/A	Active
BorisDyer	330-55-3211	4	Dyer	Boris	N/A	Active
SebastianEdmunds	453-64-3576	44	Edmunds	Sebastian	N/A	Active
JasonEllison	453-64-3591	59	Ellison	Jason	N/A	Active
MeganForsyth	111-11-1111	1	Forsyth	Megan	N/A	Active

1 2 3 4 Page size: 20 — 61 items in 4 pages

Employee Quick List

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

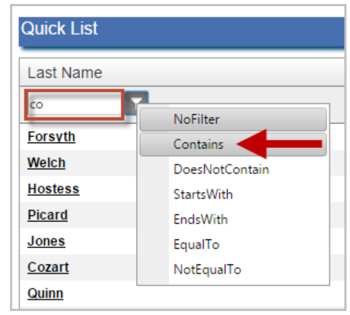
Quick List

Last Name	First Name	Job Title	Status
Forsyth	Megan	N/A	Active
Welch	Jake	N/A	Active
Hostess	Betsy	Hostess	Active
Picard	Johnny	Assistant to the Assistant Manager	Active
Jones	Bob	Reception	Active
Cozart	Lisa	Wellness Coach	Active
Quinn	Angela	N/A	Active
Thomson	Karen	N/A	Active
Carr	William	N/A	Active
Hunter	Hannah	N/A	Active

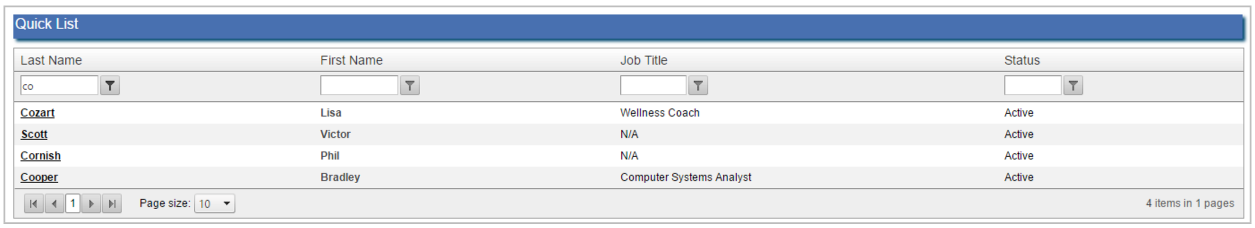
1 2 3 4 5 6 7 8 Page size: 10 — 75 items in 8 pages

On the Quick List, you can use the filters above the employee Last Name, First Name, Job Title, and Status to filter results and create a Quick List. Available options are “Contains”, “Does Not Contain”, “Starts With”, “Ends With”, “Equal To”, “Not Equal To”.

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



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



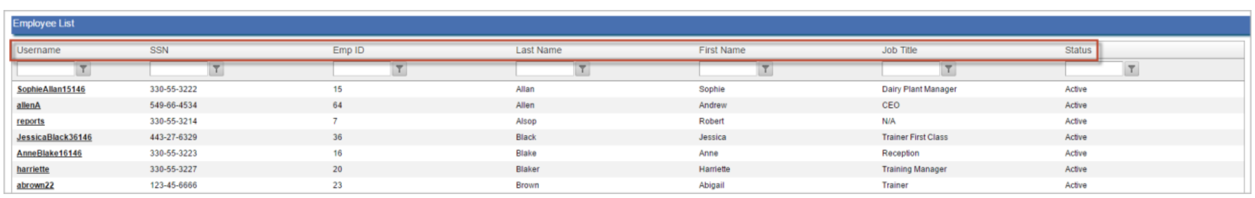
Quick List

Last Name	First Name	Job Title	Status
co			
Cozart	Lisa	Wellness Coach	Active
Scott	Victor	N/A	Active
Cornish	Phil	N/A	Active
Cooper	Bradley	Computer Systems Analyst	Active

Page size: 10 — 4 items in 1 pages

Sorting

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

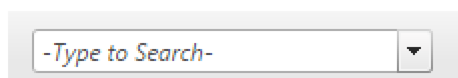


Employee List

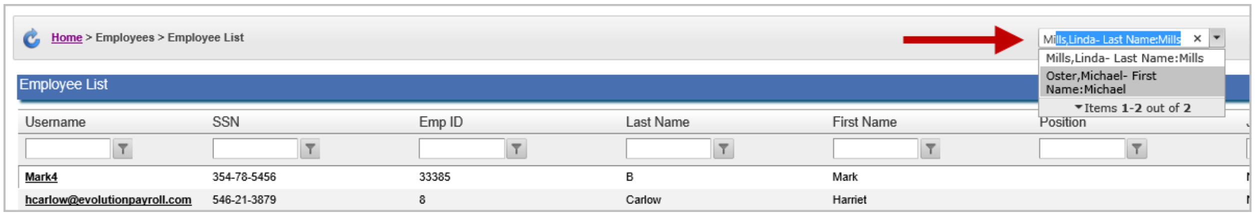
Username	SSN	Emp ID	Last Name	First Name	Job Title	Status
SophieAllan15146	330-55-3222	15	Allan	Sophie	Dairy Plant Manager	Active
allenA	549-66-4534	64	Allen	Andrew	CEO	Active
reports	330-55-3214	7	Alsop	Robert	N/A	Active
JessicaBlack36146	443-27-6329	36	Black	Jessica	Trainer First Class	Active
AnneBlake16146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

Global Search

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



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

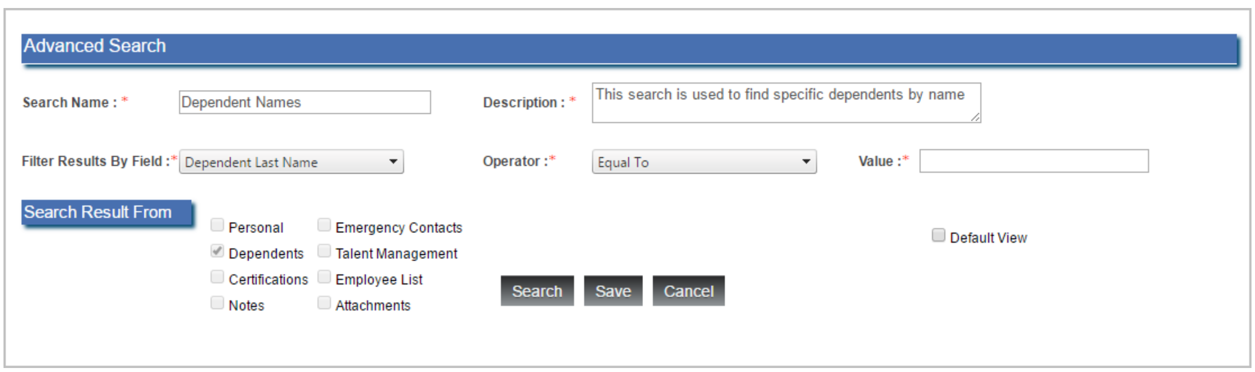


Advanced Search & My Saved Searches

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

Advanced Search

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



To perform an Advanced Search:

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

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

   The following fields are available to filter results:

   - Attachment Name
   - Certification Issue Date
   - Certification Type
   - Dependent First Name
   - Dependent Last name
   - Emergency Contact Name
   - Employee Department
   - Employee Last Name
   - Employee Location
   - Employee Number
   - Employee Job Title
   - Last Paid Date
   - Notes Name
   - SSN
   - Termination Date
   - Type

5. Select **Operator** from the dropdown menu (required).

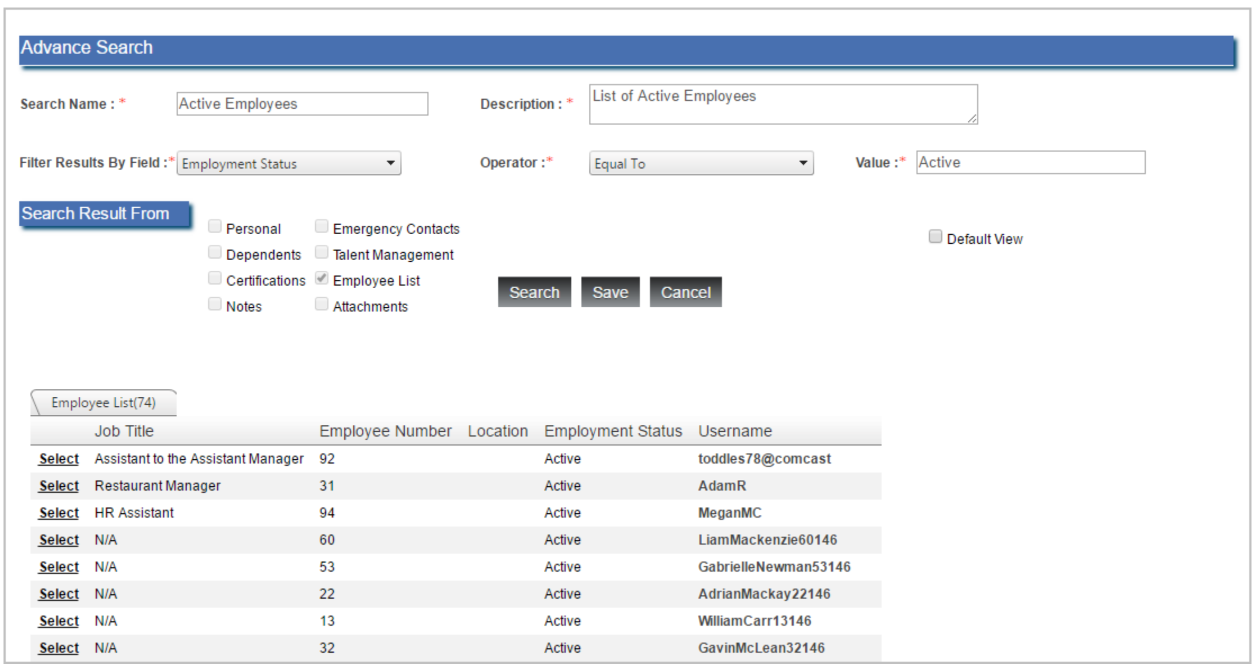
   The following Operators are available:

   - Equal To
   - Not Equal to
   - Begins With
   - Ends With
   - Contains
   - Does Not Contain

6. Type in the Value (required).

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

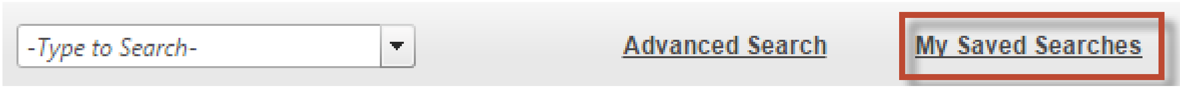
7. Click on **Search**.



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

My Saved Searches

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




My Saved Searches

Add Delete

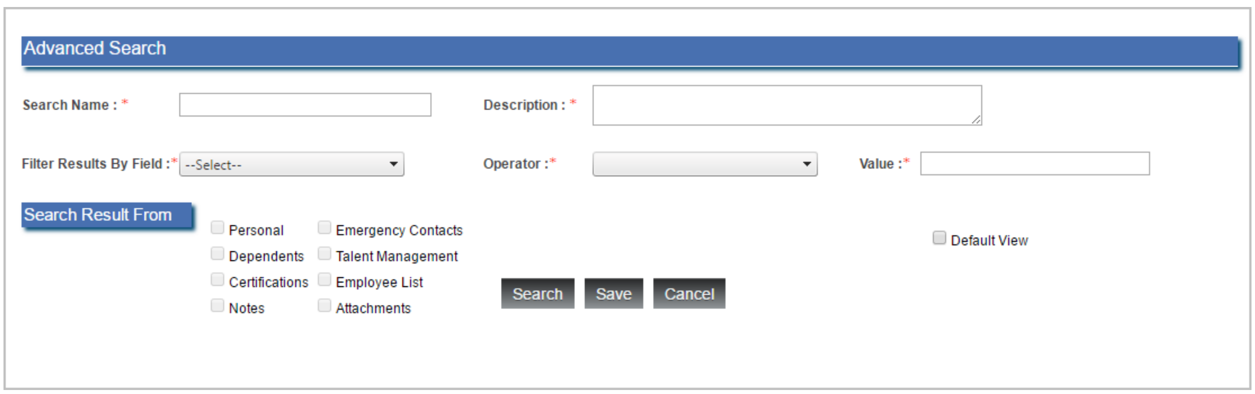
		Name	Description	Record Filter	Record Type	Default View
	View	SSN partial search	SSN partial search	SSN(Does Not Contain)443	Personal	False
	View	First Name	first name of dependants	Dependent First Name(Begins With)D	Dependents	False
	View	Current Employees	Current Active Employees	Employment Status(Equal To)Active	Employee List	False
	View	Active Employees	This search is used to find only active employees	Employment Status(Equal To)Active	Employee List	True

Displaying a list of active employees only

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

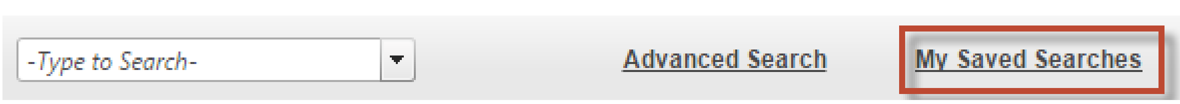
1. Click on the **Advanced Search** link on the top right of the Home page.

   Result: The system displays the **Advanced Search** box.



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

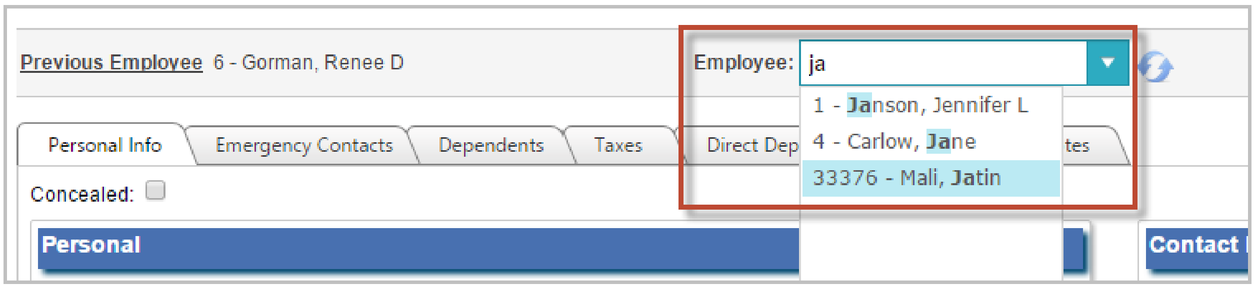
Users can view inactive employees by defining a different Advanced Search, saving it with a different name and then using it by clicking the **My Saved Searches** text link at the top right of the Home page.



Next and Previous Employee and the Employee dropdown

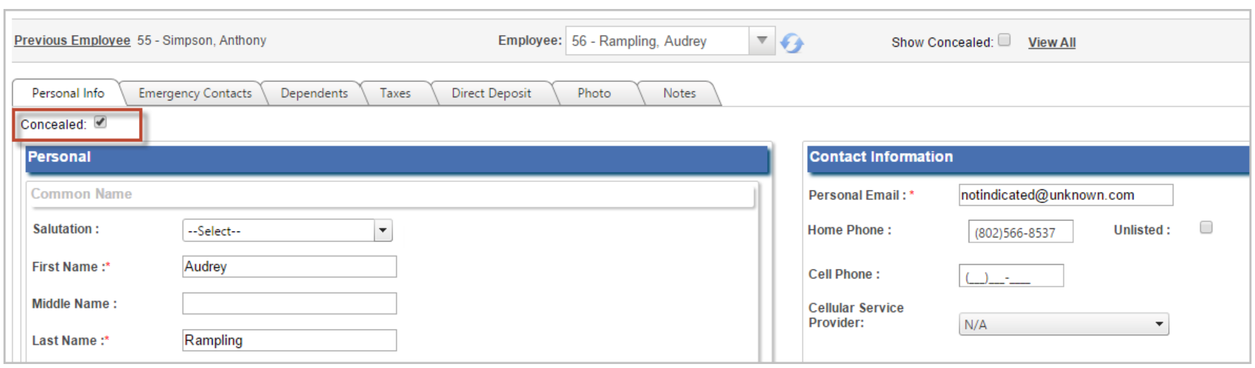
Once you are in an employee record, you can use the **Previous Employee** and **Next Employee** links to navigate backward and forward through the employee list. This is helpful when making updates to multiple employees.

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



Setting an Employee to not display on the list

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

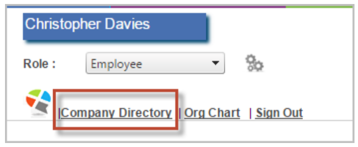


If you set an employee to Concealed but want to have them display on the list, click on the **Show Concealed** option at the top of the screen.

Company Directory & Organization Chart

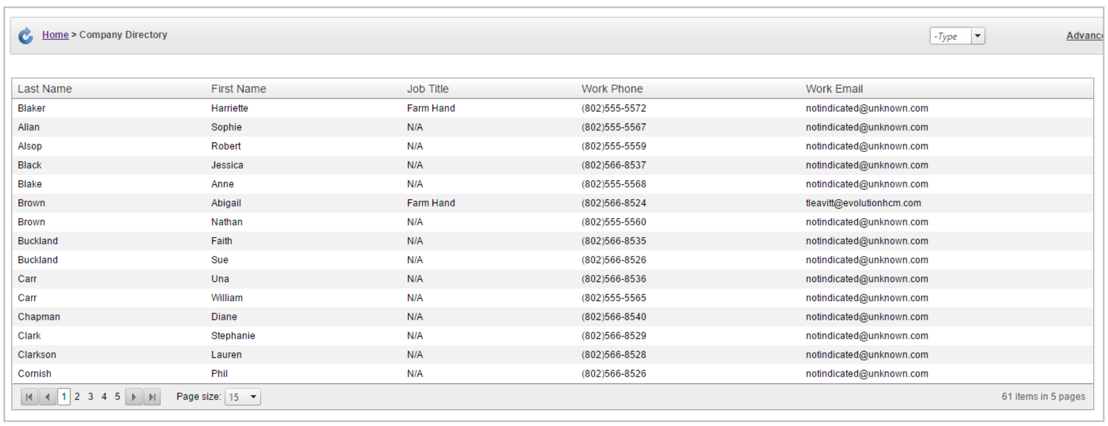
If enabled for their role, a user can display a Company Directory from their Home page.
To display the Company Directory:

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



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

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



Home > Company Directory

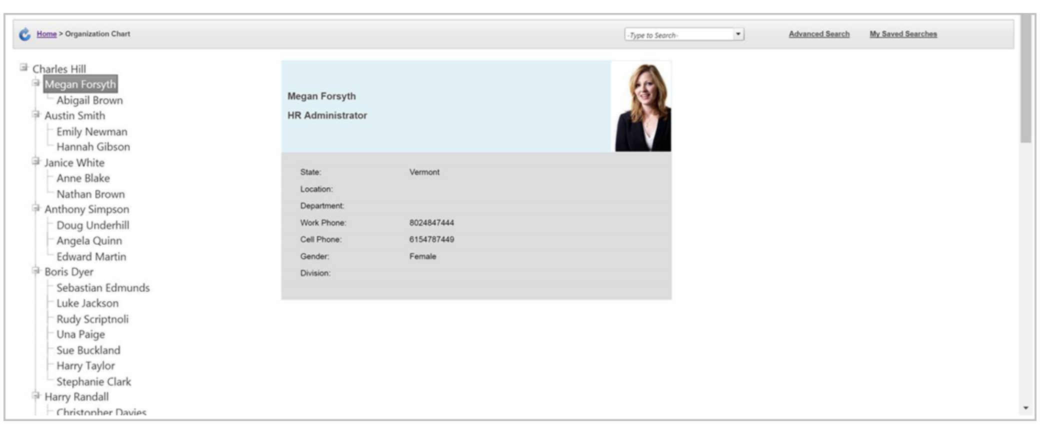
Last Name	First Name	Job Title	Work Phone	Work Email
Blaker	Harriette	Farm Hand	(802)555-5572	notindicated@unknown.com
Allan	Sophie	N/A	(802)555-5567	notindicated@unknown.com
Alsop	Robert	N/A	(802)555-5559	notindicated@unknown.com
Black	Jessica	N/A	(802)566-8537	notindicated@unknown.com
Blake	Anne	N/A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

1 2 3 4 5 Page size: 15 — 61 items in 5 pages

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

Organization Chart

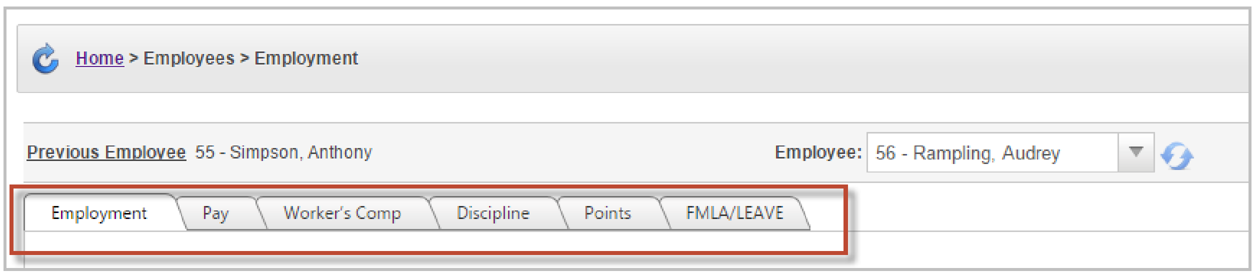
Note that for Position Enabled companies, users can also click on the **Org Chart** link on the Home page (if it has been enabled for the user's role) to display a graphical organization chart for the company.



Editing Employee information

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

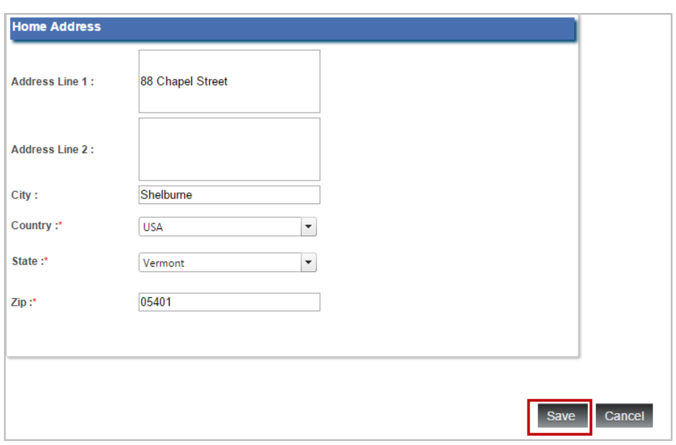
Once you navigate to an employee screen, other screens in that category will be arranged as tabs for the employee record.



To edit an employee screen:

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

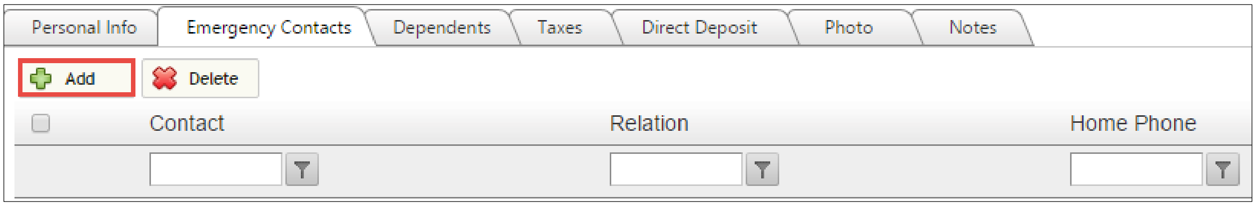
Important: If you add or edit any information on any of the Employment screen tabs (**Employment**, **Pay**, **Workers Comp**. etc.) make sure that you click the **Save** button before navigating elsewhere in the system. If you add information on these screens and navigate away without saving, your changes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



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

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

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

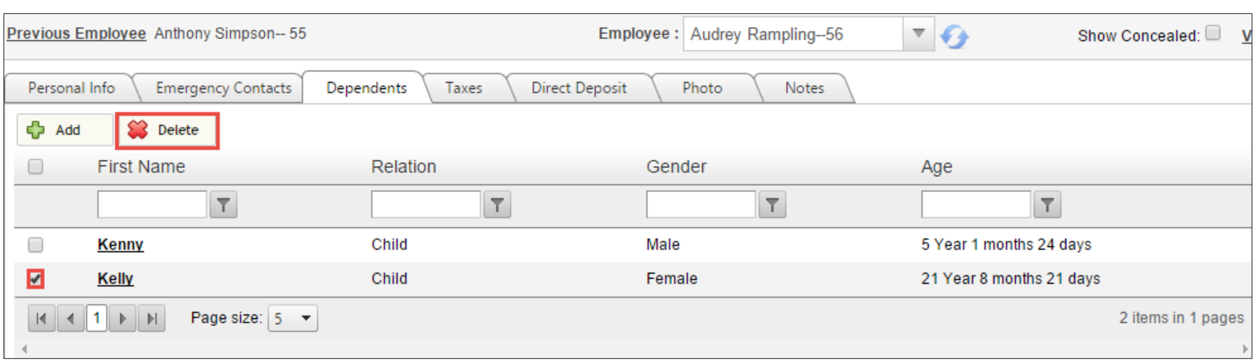


To edit an existing data record:

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

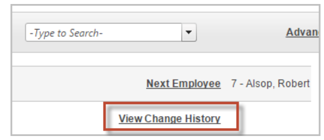
To delete records on a list screen:

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



Note: You may select multiple items for deletion.

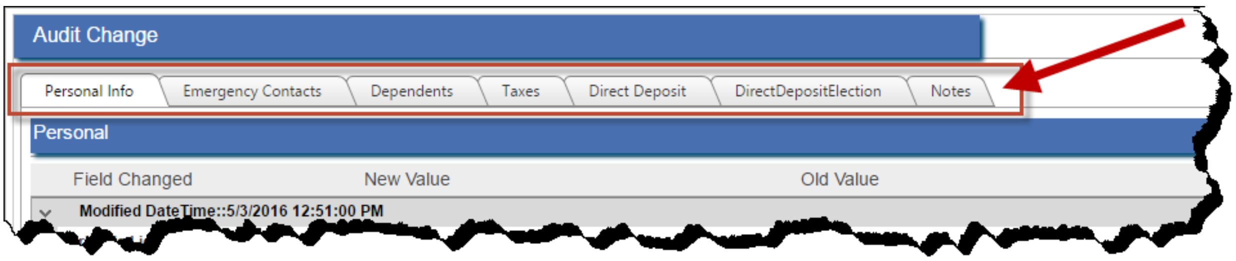
Viewing Change History of the Employee screens



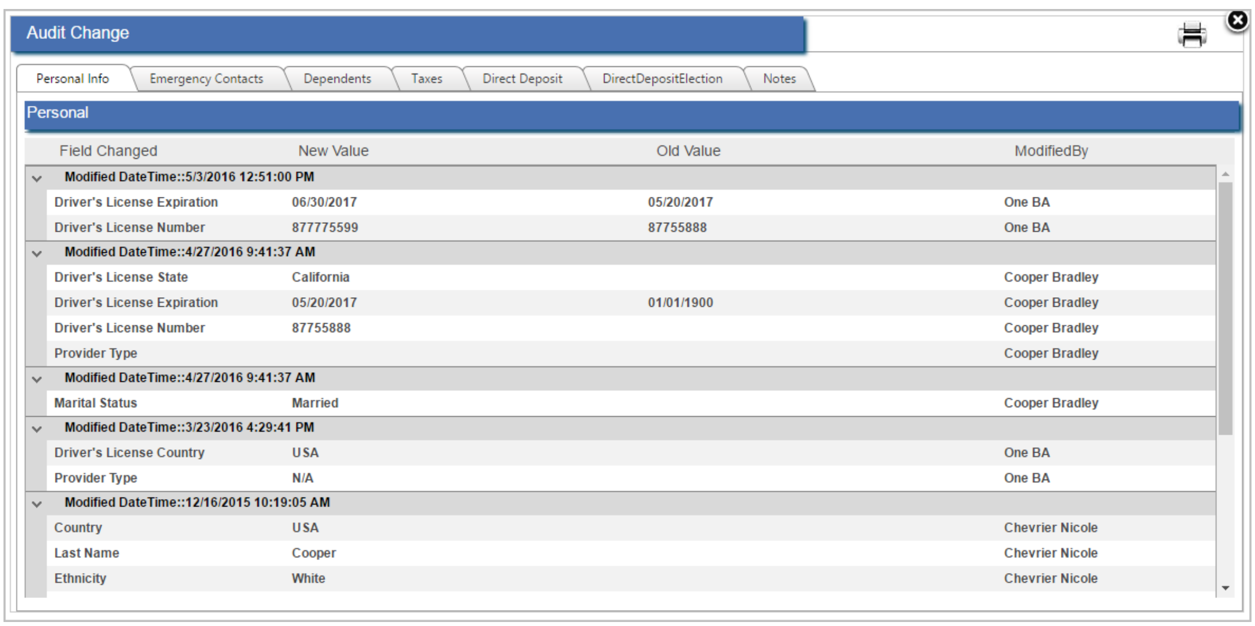
The **View Change History** link on the upper right of the Employee screens lets you view an audit history of all changes made to the fields on the Employee screens for this specific employee.

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

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

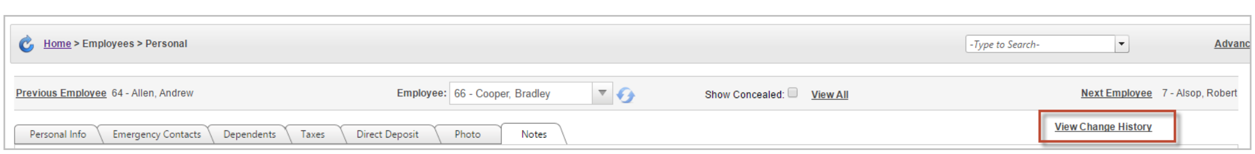


And here is a view of the entire Audit Change screen:

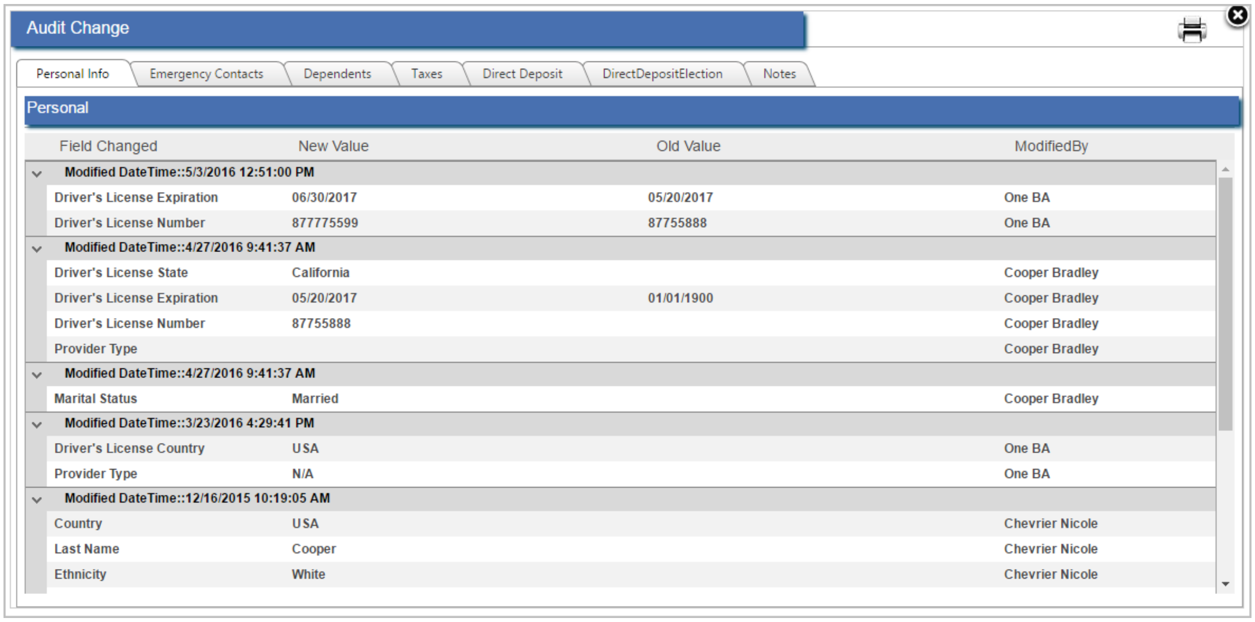


To see the changes made to an employee's record (audit history):

1. Click the **View Change History** link.



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



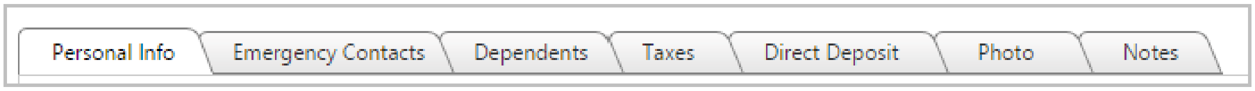
Field Changed	New Value	Old Value	ModifiedBy
Modified DateTime::5/3/2016 12:51:00 PM			
Driver's License Expiration	06/30/2017	05/20/2017	One BA
Driver's License Number	877775599	87755888	One BA
Modified DateTime::4/27/2016 9:41:37 AM			
Driver's License State	California		Cooper Bradley
Driver's License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

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

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

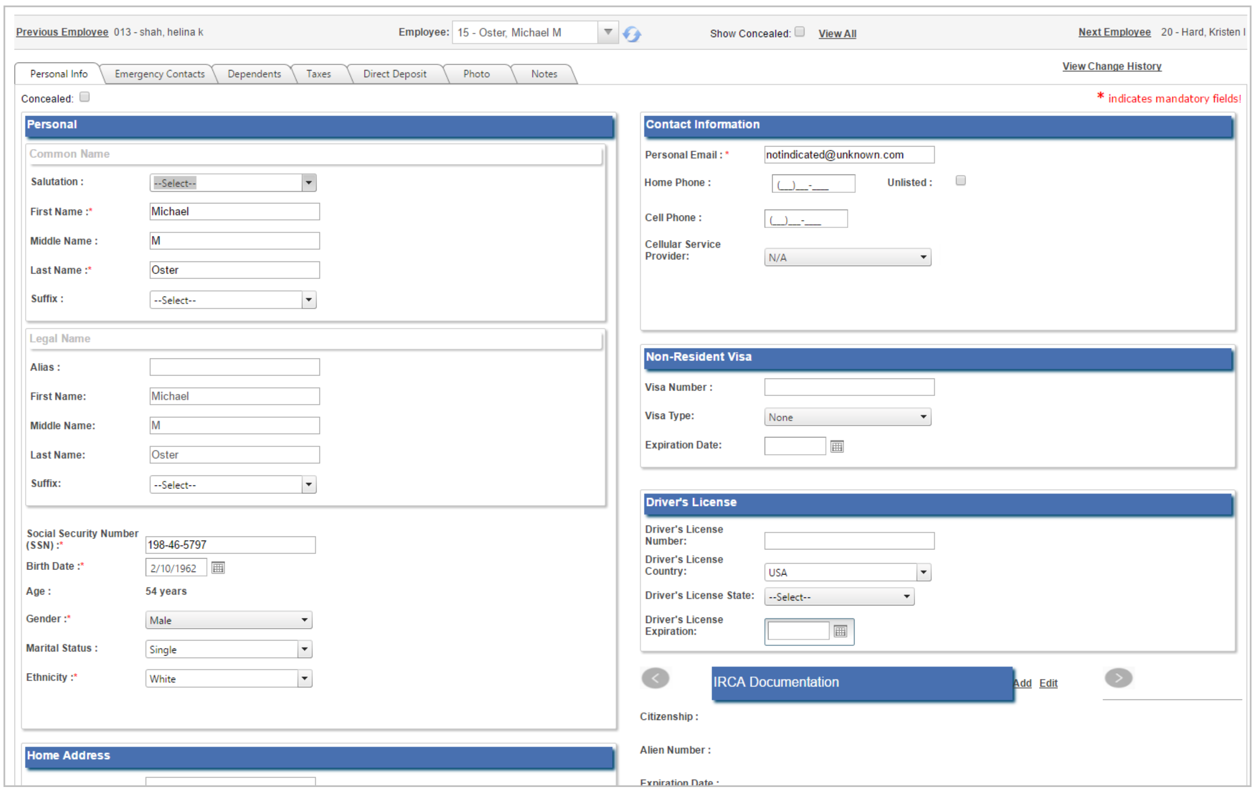
Employee-Personal

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



Personal Info

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



To add I-9 information:

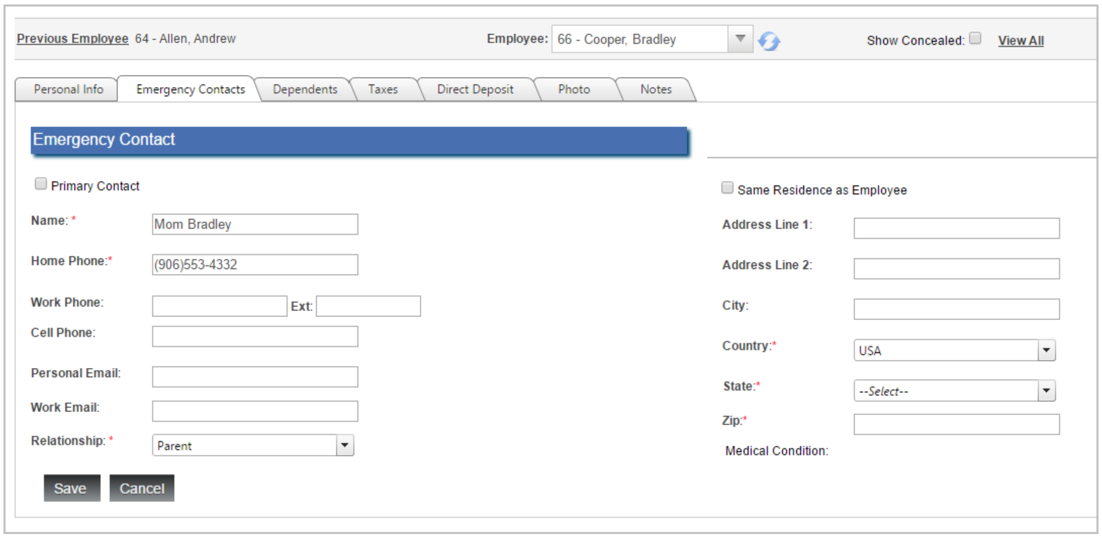
1. Go to **Employees - Personal**.
2. Click the **Add** link found in the **IRCA Documentation** section of this screen.
3. Populate the I-9 screen that displays with the employee information.
4. Click **Save**.

Emergency Contacts

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

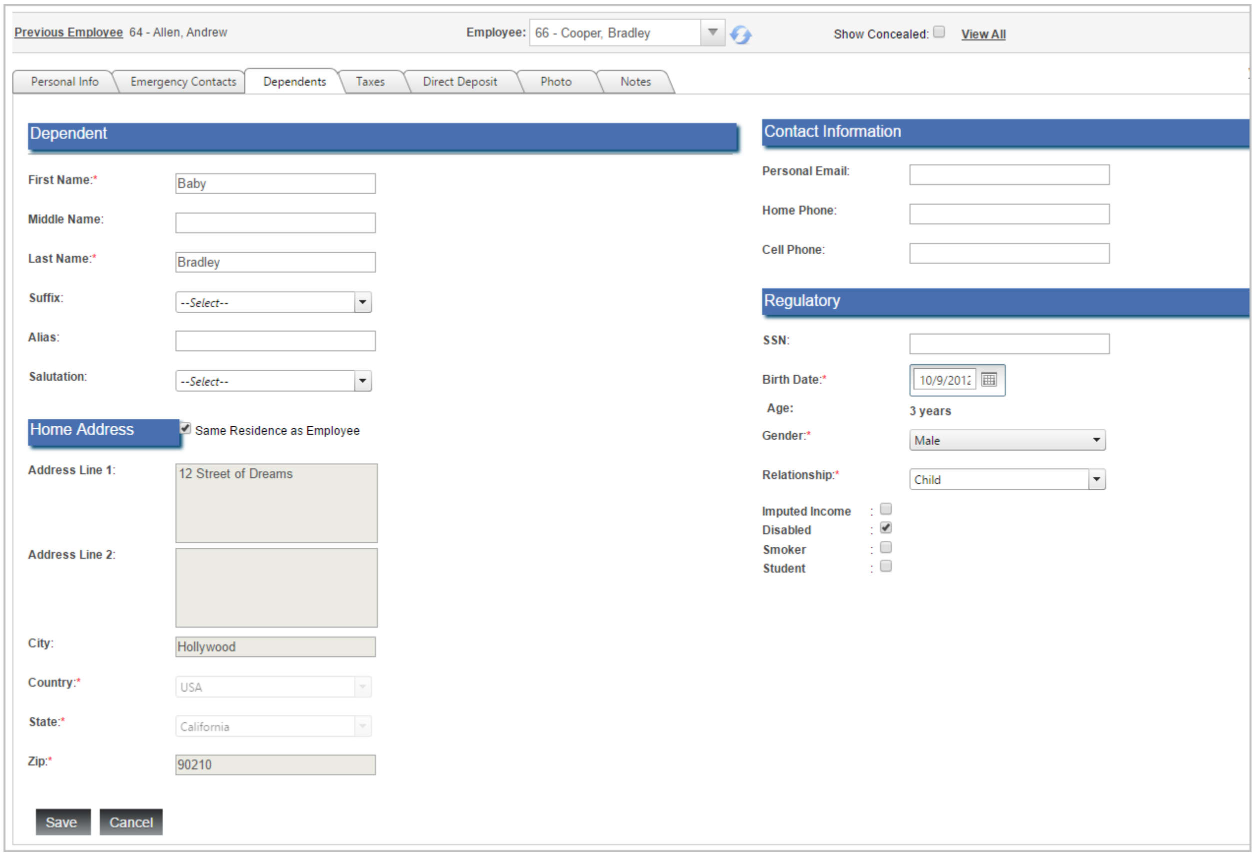
To add an Emergency Contact:

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



Dependents

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



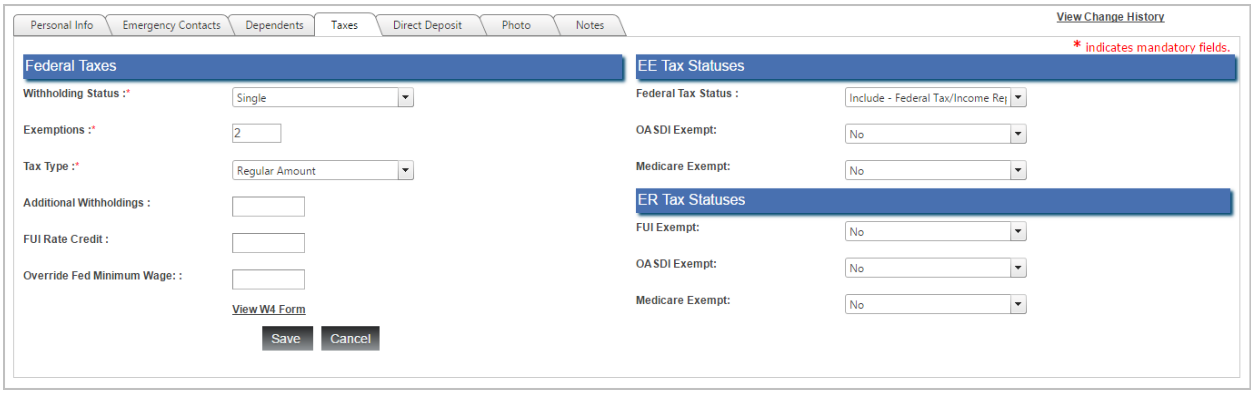
To add a Dependent:

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

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

Taxes

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



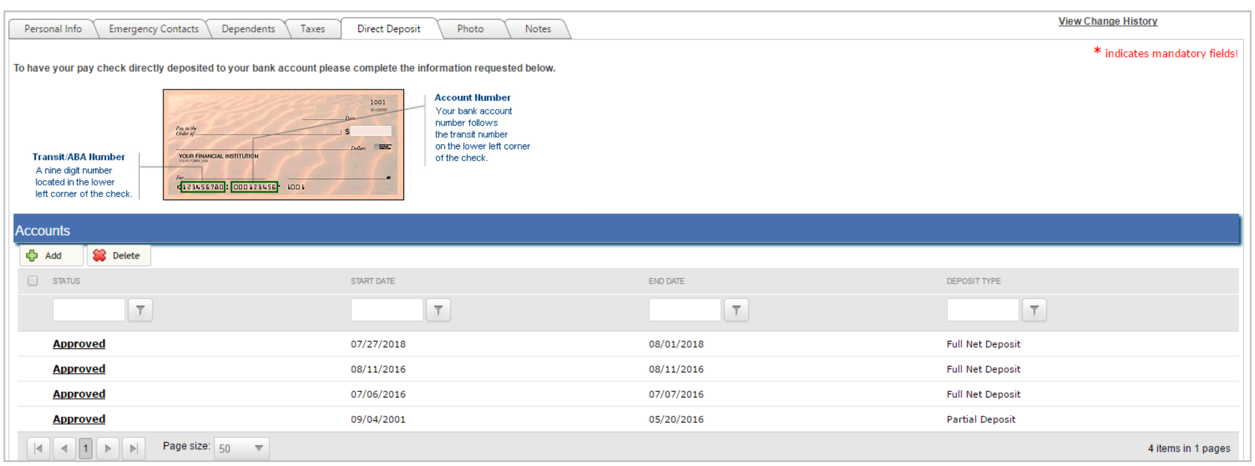
To edit Federal Tax information:

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

Direct Deposit

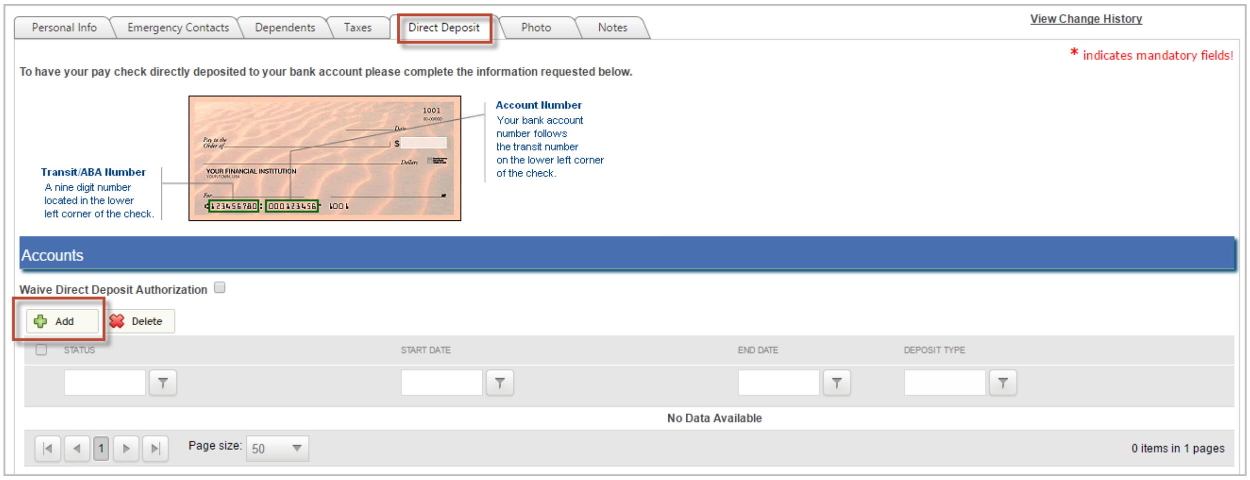
Using the **Direct Deposit** tab of the Employees screen, HR Admins, Payroll staff, or managers, acting on behalf of the employee, can create, change, and approve one or multiple direct deposit account requests for the employee, as well as track if the employee waived direct deposit.

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

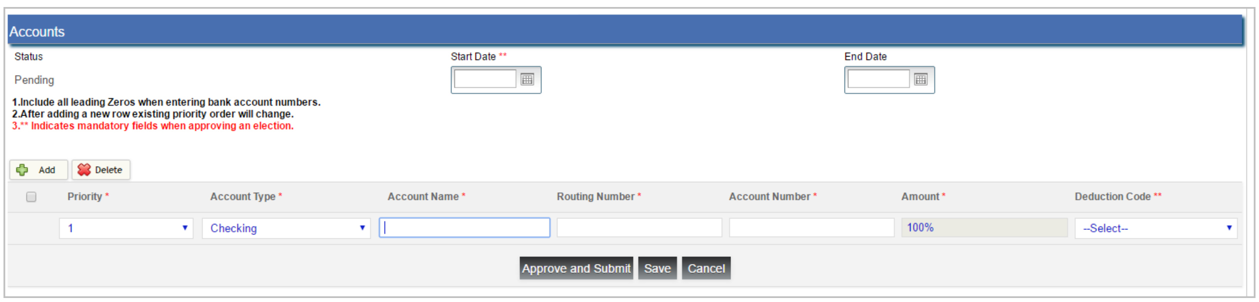


To add a new direct deposit for an employee:

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



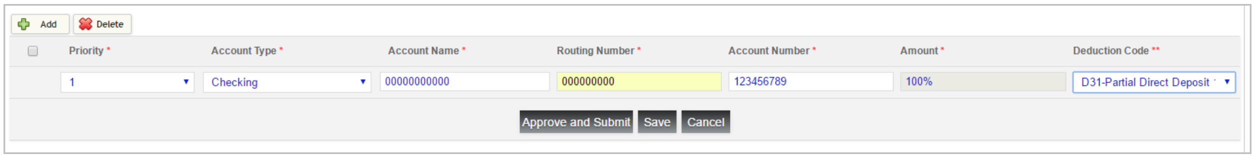
Result: The system displays the following screen.



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

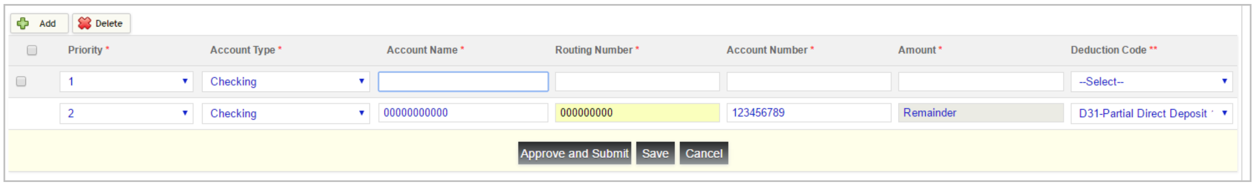
     When HR Admin, Payroll staff, or managers are creating/changing an employee's direct deposit elections, they can prioritize the order in which accounts the money will be deposited.
   - Account Type of **Checking**
   - **Amount** field defaults to **100%**.
   - The **Status** field (informational- read only) displays **Pending**.

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

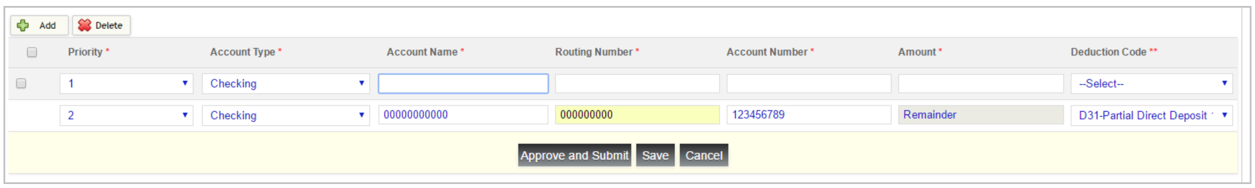


HR Admin Approvers/Managers have the ability – within Advanced HR – to associate (map) each employee direct deposit election to the corresponding Scheduled E/D code (**Deduction Code**) for that company within the Approval screen in Advanced HR; the approver/manager is no longer required to go into Evolution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

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



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



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

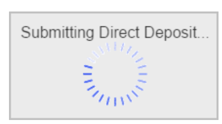
Users with permission to approve Direct Deposit requests can set both the Start Date and the End Date fields to a date in the past, if required. An employee who submits a direct deposit request themselves cannot do this; only approvers. Note that once a Direct Deposit is approved, the Start Date cannot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

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

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

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

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

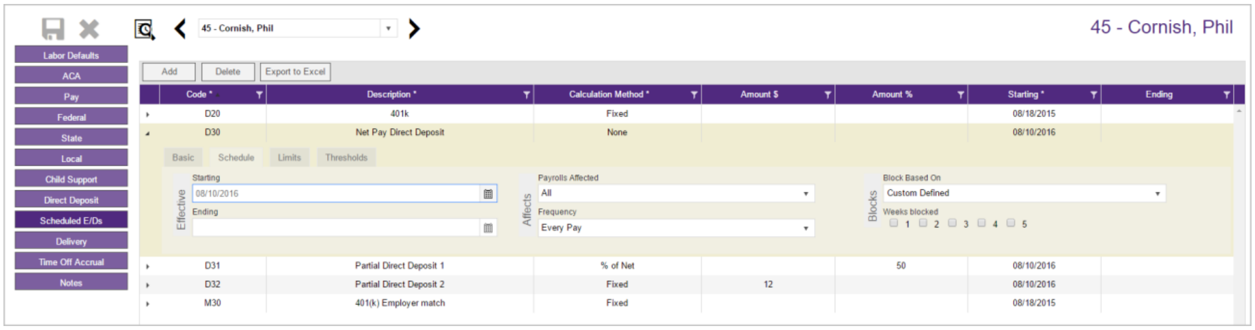


The system then changes the **Status** of the direct deposit request to **Approved**.

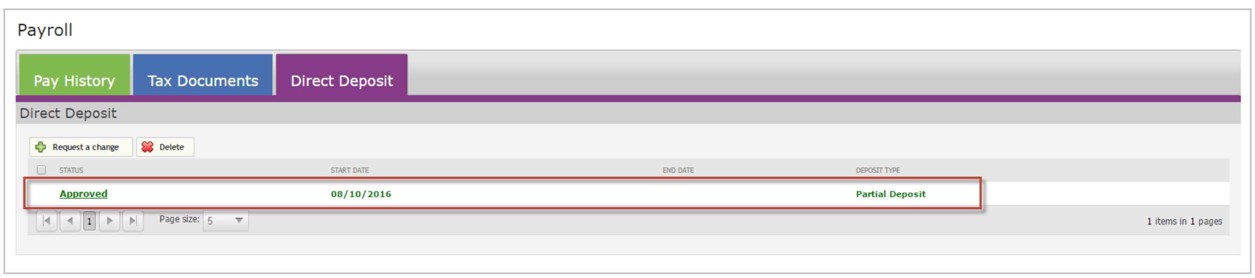
Or, the user can click the **Save** button to save the changes made to the screen and not submit the form; this does not change the status or the request from **Pending** to **Approved**. The user can come back later to complete the approval process.

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

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



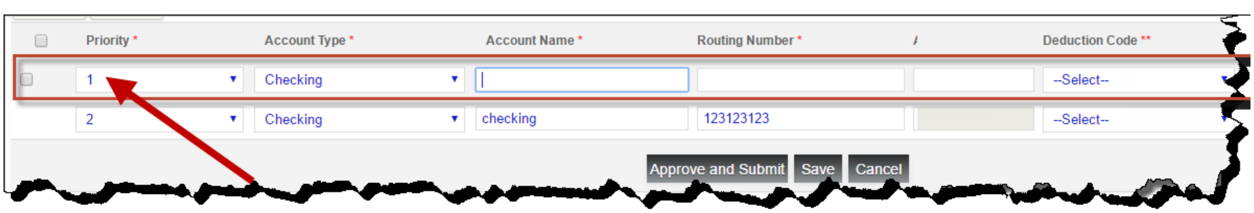
After the approver clicks the **Approve and Submit** button, if the Employee then goes to the Port they can then see that their direct deposit request has now been approved. Note that in a future release, we will be adding a notification to the employee that their direct deposit request has been approved.



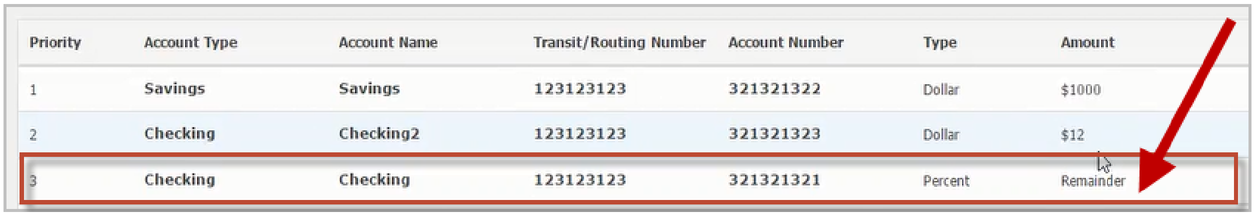
Direct Deposit rules

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

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

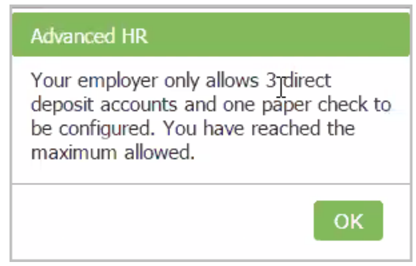


- The **Remainder** amount is always the **Last** priority in the direct deposit elections.



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

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



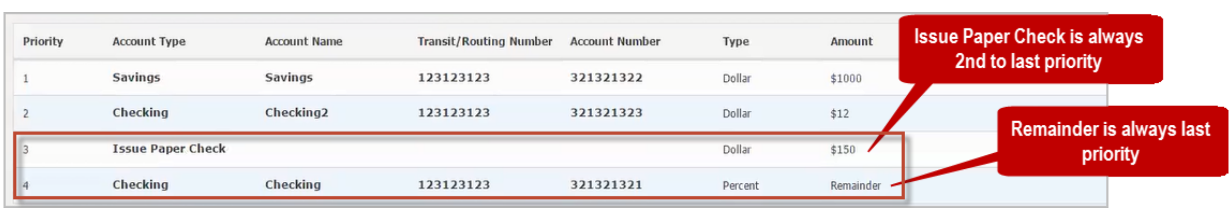
- The Company sets the limit on the amount of E/D Codes (Deduction Codes) that can be used for its employee's direct deposits. The employee cannot exceed the number of direct deposit elections than the number of E/D Codes that the company has set up and allowed for this purpose.

  So, for example, if the Company has set up and allows 3 E/D Codes for direct deposit, than the employee cannot exceed that number of their direct deposit elections. If the employee exceeds the number of account requests above the number that the company allows, they will receive a message informing them of that this is not allowed. Either, if Paper Checks are not allowed for this company: "Your employer only allows 'n' direct deposit accounts to be configured. You have reached the maximum allowed." Or, if Paper Checks are allowed for this company, then "Your employer only allows 'n' direct deposit accounts to be configured. You have reached the maximum and can only select one additional election as a paper check."

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

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

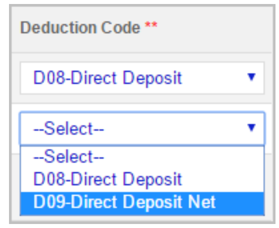
- The **Issue Paper Check Account Type** option will always be the second to the last **Priority** item. The reason for this it the specific way that we submit payrolls in Evolution and create direct deposits and not by an associated E/D for the paper check (that is, the **Take Home Pay** field value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



Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Type	Amount
1	Savings	Savings	123123123	321321322	Dollar	$1000
2	Checking	Checking2	123123123	321321323	Dollar	$12
3	Issue Paper Check				Dollar	$150
4	Checking	Checking	123123123	321321321	Percent	Remainder

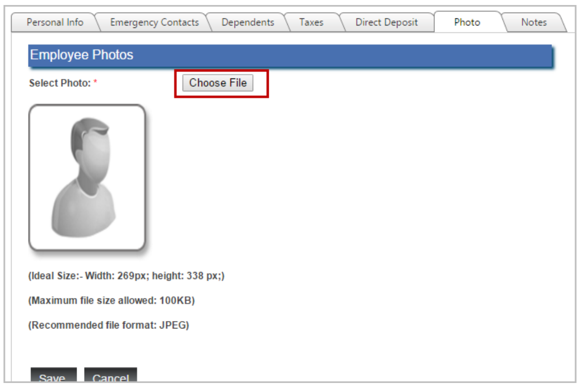
Direct Deposit Priority Rules

- Finally, the **Deduction Code** (Scheduled E/D Code) column field the user selects for each direct deposit election row on the screen must be unique; in other words, the same Deduction Code cannot be used for more than one direct deposit row (election). The user cannot select the same Deduction Code for two different direct deposit accounts.



Photo

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



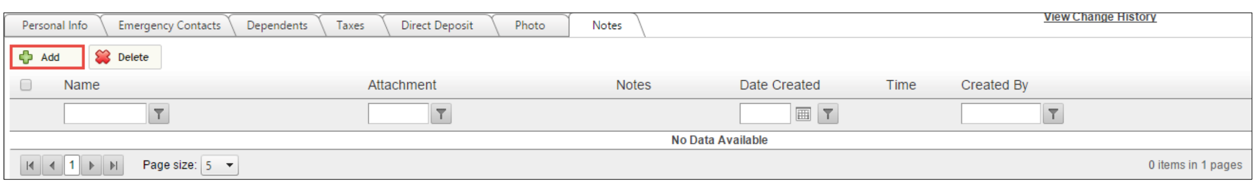
To select a photo to attach to an employee's record:

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

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

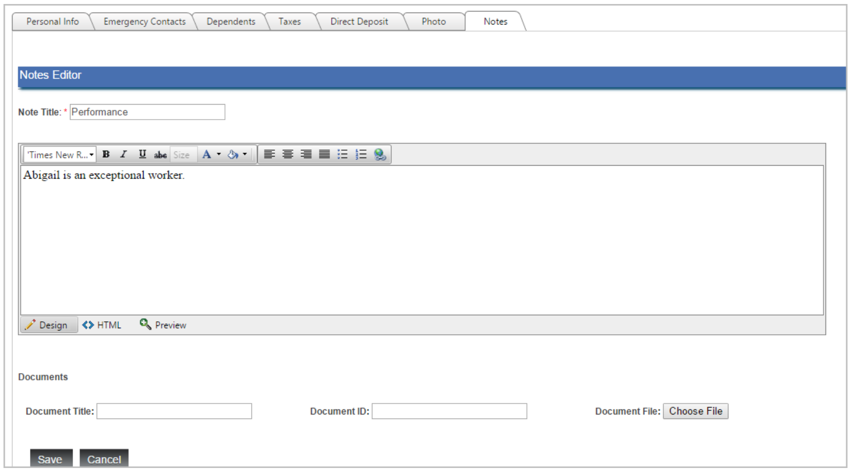
Notes

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



To add a note to an Employee Folder:

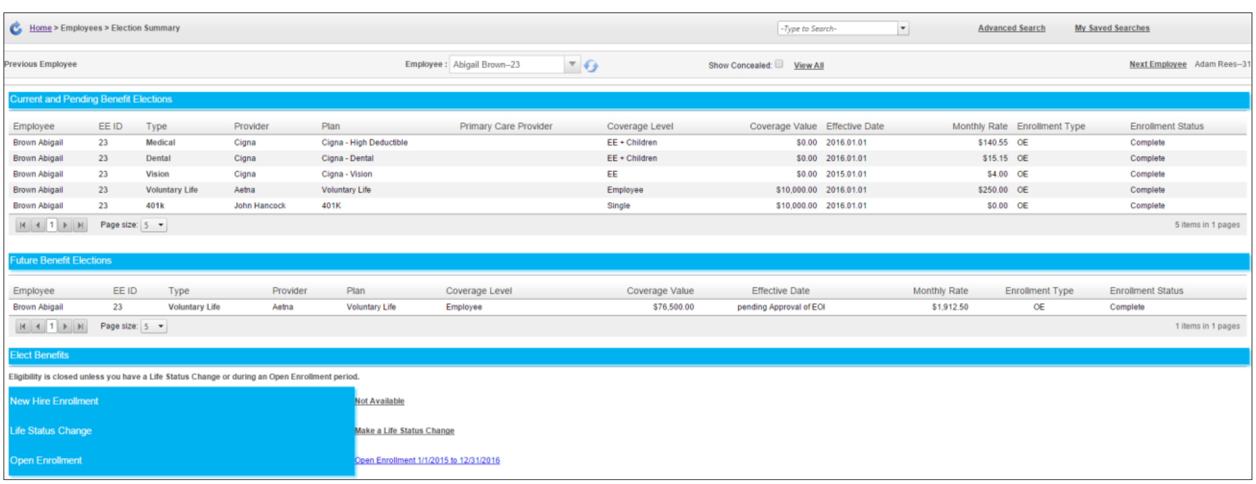
1. Go to **Employees – Personal – Notes**.
2. Click **Add**.
3. Enter the **Note Title** and Contents.
4. Click **Save**.



Employee-Benefits

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

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



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

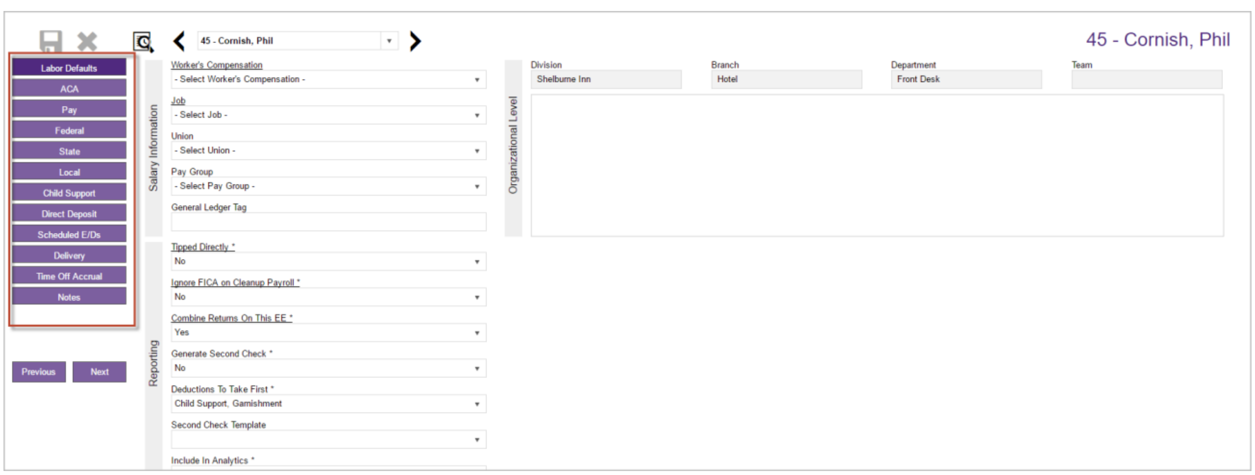
Option	Description
New Hire Enrollment	If the employee is a new hire, the employee or administrator can utilize "New Hire Enrollment" to add/edit benefits.
Open Enrollment	Administrators can configure open enrollment timeframes using benefit classes, and during this time employees and administrators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

Employees - Employee Payroll

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

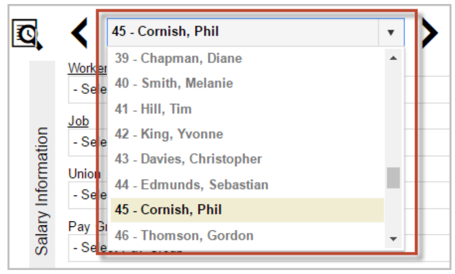
To display the Employee Payroll screens for an employee, go to **Employees** – **Employee Payroll**.

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

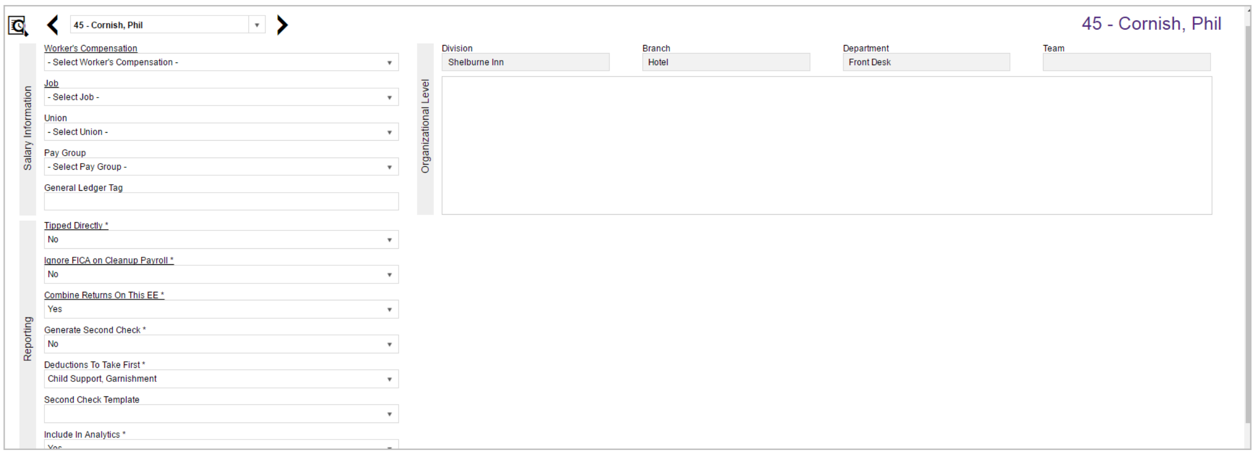


Click on the navigation menu items on the left side of the screen to go to any of the Employee Payroll screens – ACA, Pay, Federal, etc., for that employee. You can use the Employee dropdown field at the top of the screen to go to the Employee screens for a different employee.

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



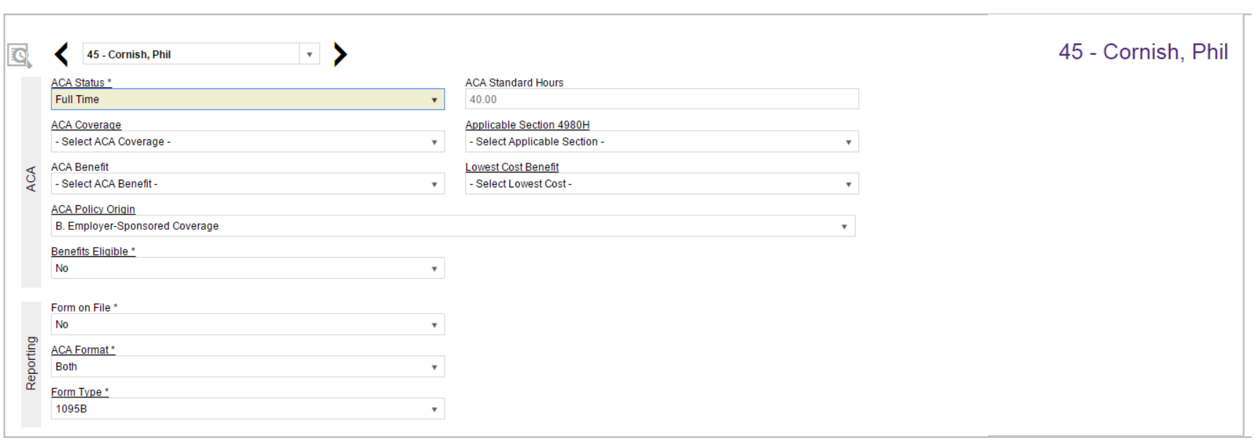
Employees - Labor Defaults screen



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

Employees - ACA screen

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

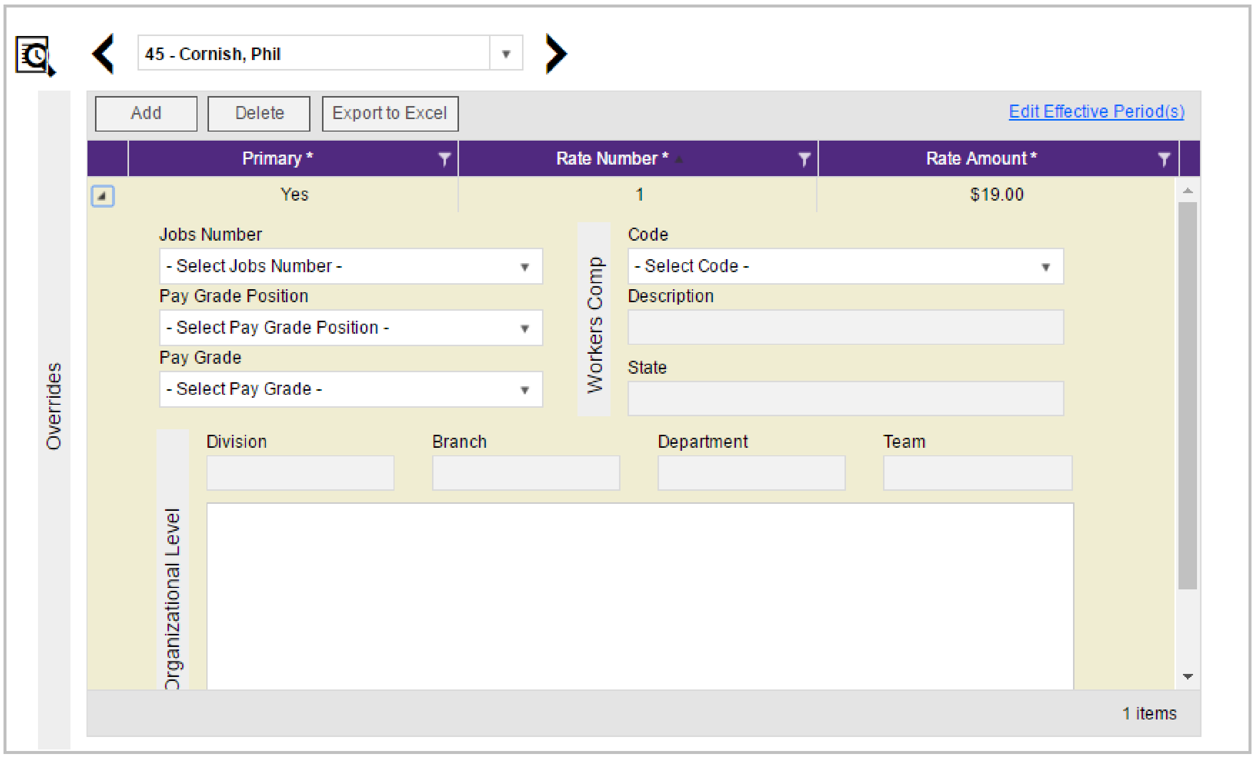


Employees - Pay screen

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

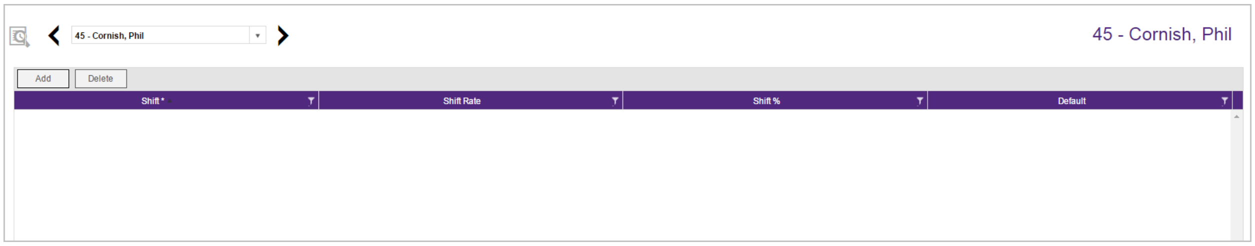
To update the rate of pay:

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



Shifts Sub-menu

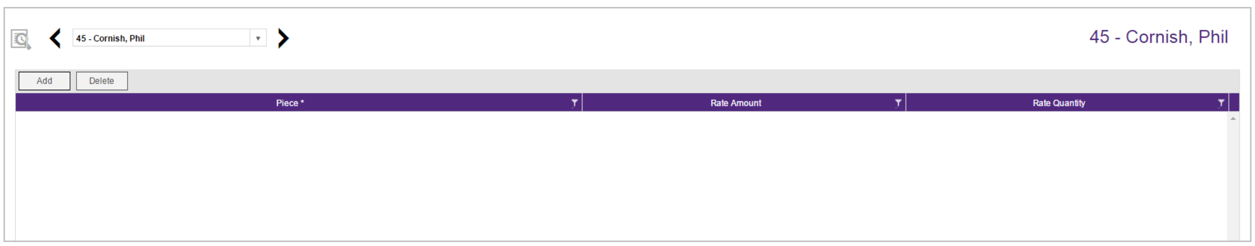
Shifts must be already created in Evolution by the Service Bureau, after which they can be applied to employees in Employee Payroll. Some employees may be assigned multiple shifts.



Complete the required and applicable fields.

Piecework Sub-menu

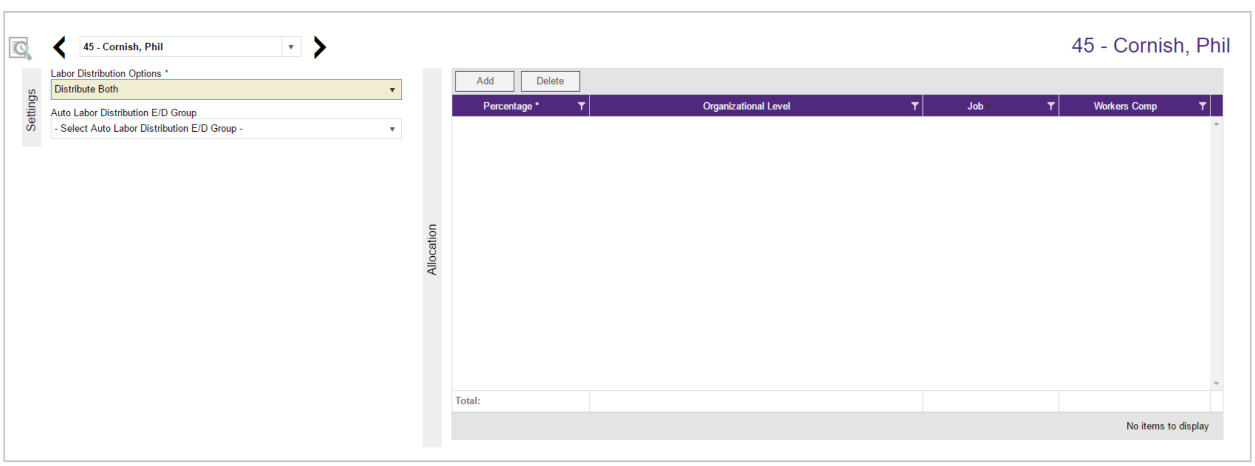
The Piecework screen is where piecework items are set up and applied to employees. Before these can be applied to employees, the piecework items must be set up in Evolution at the Client level.



Complete the required and applicable fields.

Auto-Labor Distribution

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



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

4. Use the Diskette icon to save the changes.

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

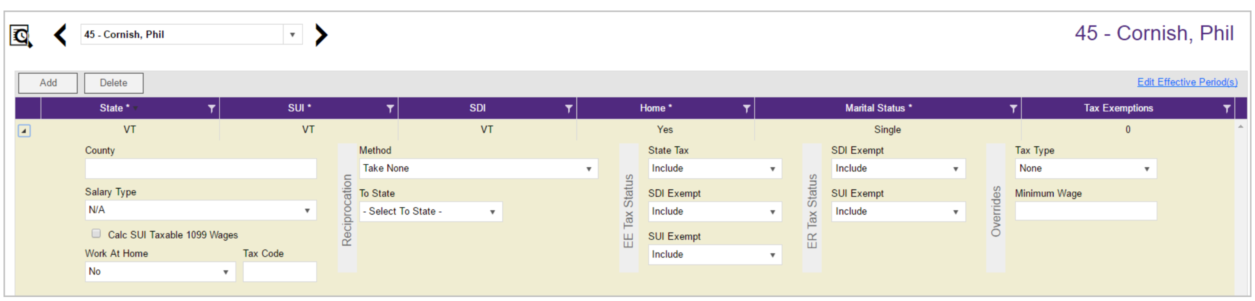
Employees - Federal screen

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

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

Employees - State screen

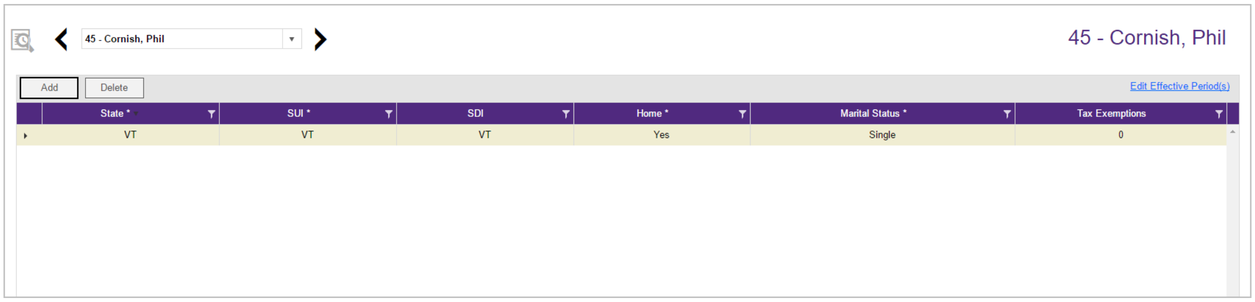
State Taxes are currently managed within Employee Payroll. This allows for multiple states to be selected and setup for Payroll purposes.



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

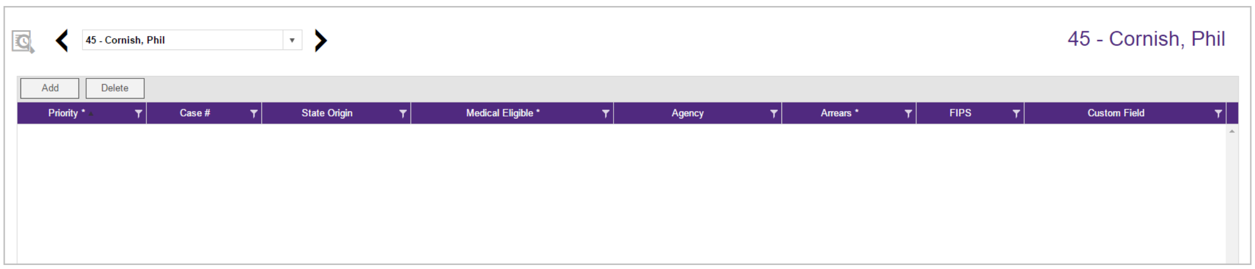
Click the **Add** button to add another state as needed, or click the **Delete** button to delete a state from the employee's record.

Employees - Local screen



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

Employees - Child Support screen

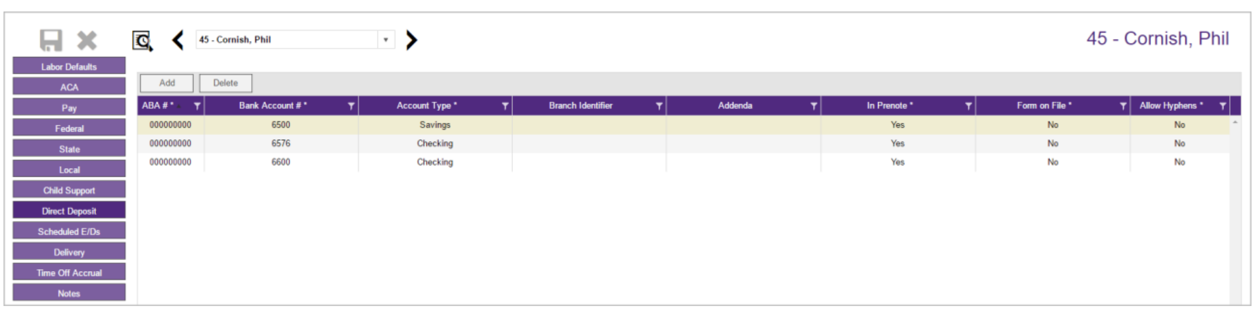


If the employee owes Child Support, the Child Support case information is displayed on this screen.
Child Support cases should be added by first adding the Scheduled E/D and adding the case information there.

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

Employees - Direct Deposit screen

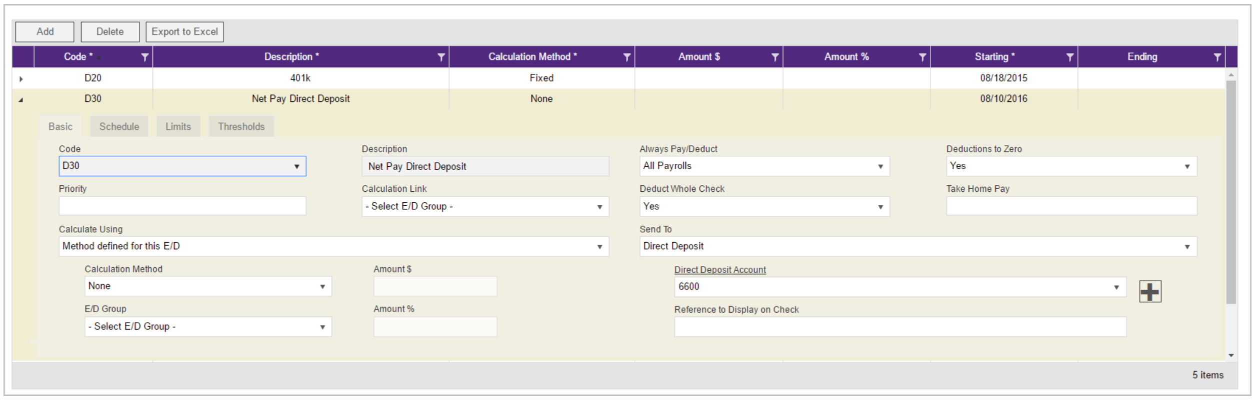
Users can add, delete, and view direct deposit information. Direct Deposit Account information can be added or edited in this menu. When an employee requests a change in Advanced HR, the manager or administrator can come here to update the account information as needed.

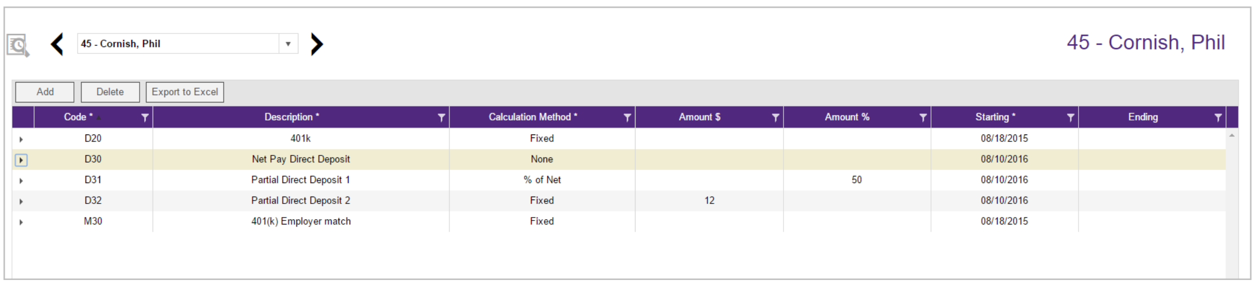


Important: Adding a Direct Deposit account here does not create the Scheduled E/D. To add a Scheduled E/D, use the Employee – Personal – Direct Deposit screen instead (which now allows the approver to select the Scheduled E/D Code (Deduction) code for each direct deposit election. Note that If you add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

Employees - Scheduled E/Ds screen

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





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

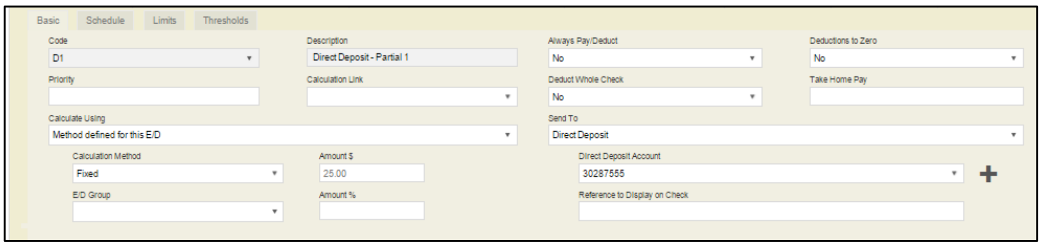
The table below identifies some of the most common E/D Codes that are and those that are not considered Scheduled E/Ds.

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

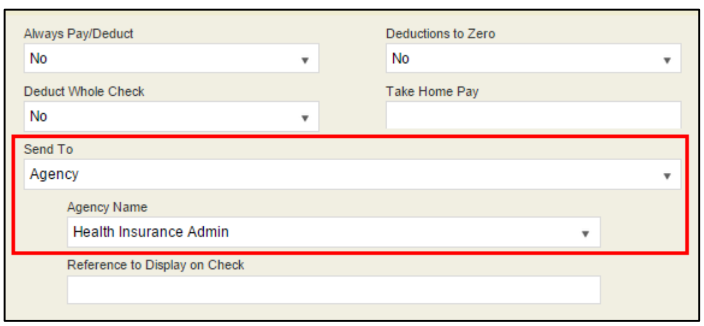
E/D Code Type	E/D Code Type	Scheduled E/Ds?
Hourly		No
Sick		No
Vacation		No
Paid Time Off		No
Bonuses		No

To set up employee-level Scheduled E/Ds:

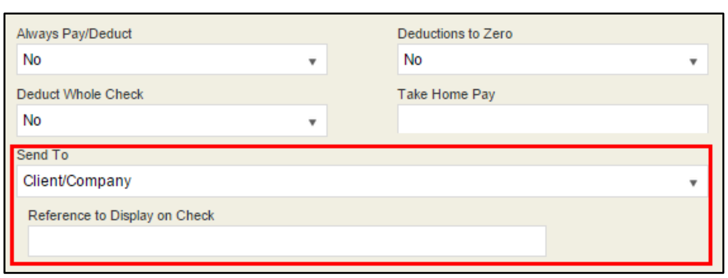
1. Click the **Add** button to add a Scheduled E/D, or click the **Delete** button to delete a Scheduled E/D from the employee's record.



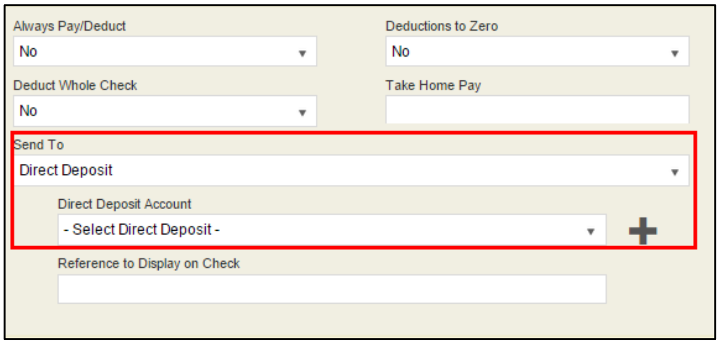
* After a selection is made in the **Send to** field, an additional field opens below, depending upon the selection:



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

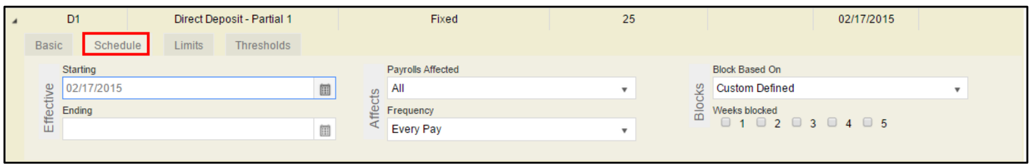


- **Client / Company** – When Client / Company is selected.

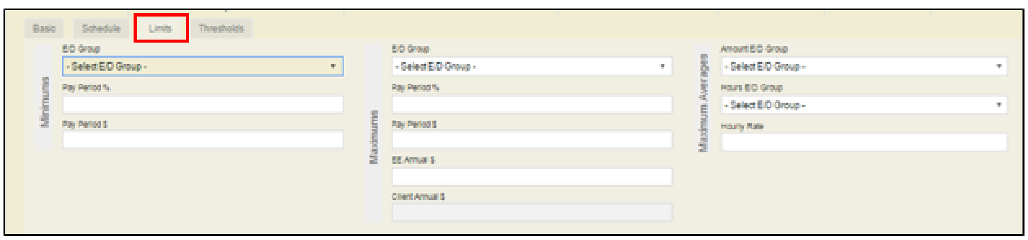


- Direct Deposit - when Direct Deposit is selected in the **Send To** field, a dropdown field opens below, where the user selects an account number, or clicks the **plus** sign to add a new account number.

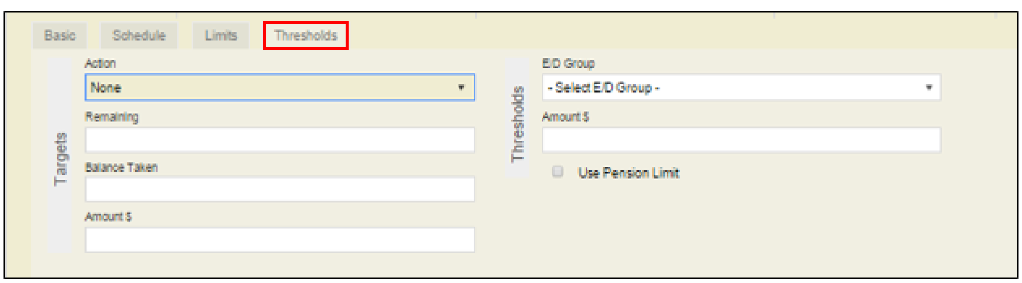
2. Click the **Schedule** tab when this screen is complete. Complete all of the applicable fields.



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



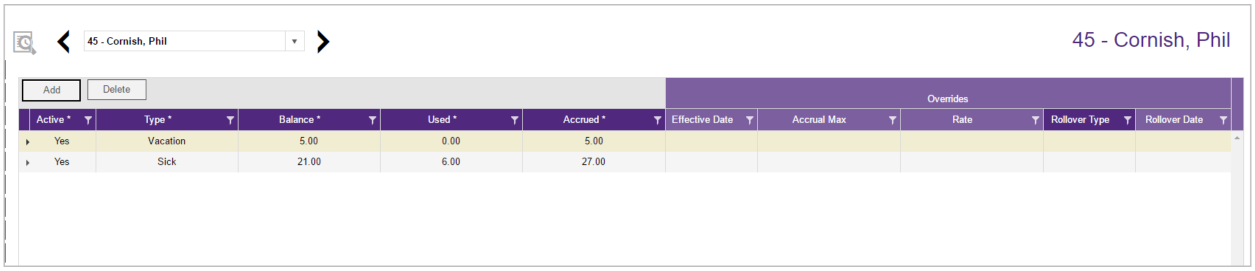
4. Click the **Thresholds** tab when this screen is complete. Complete all of the applicable fields.



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

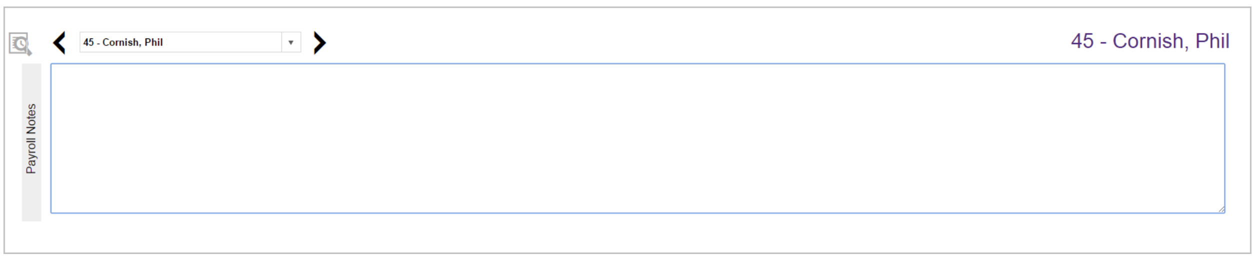
Time Off Accrual

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



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

Notes

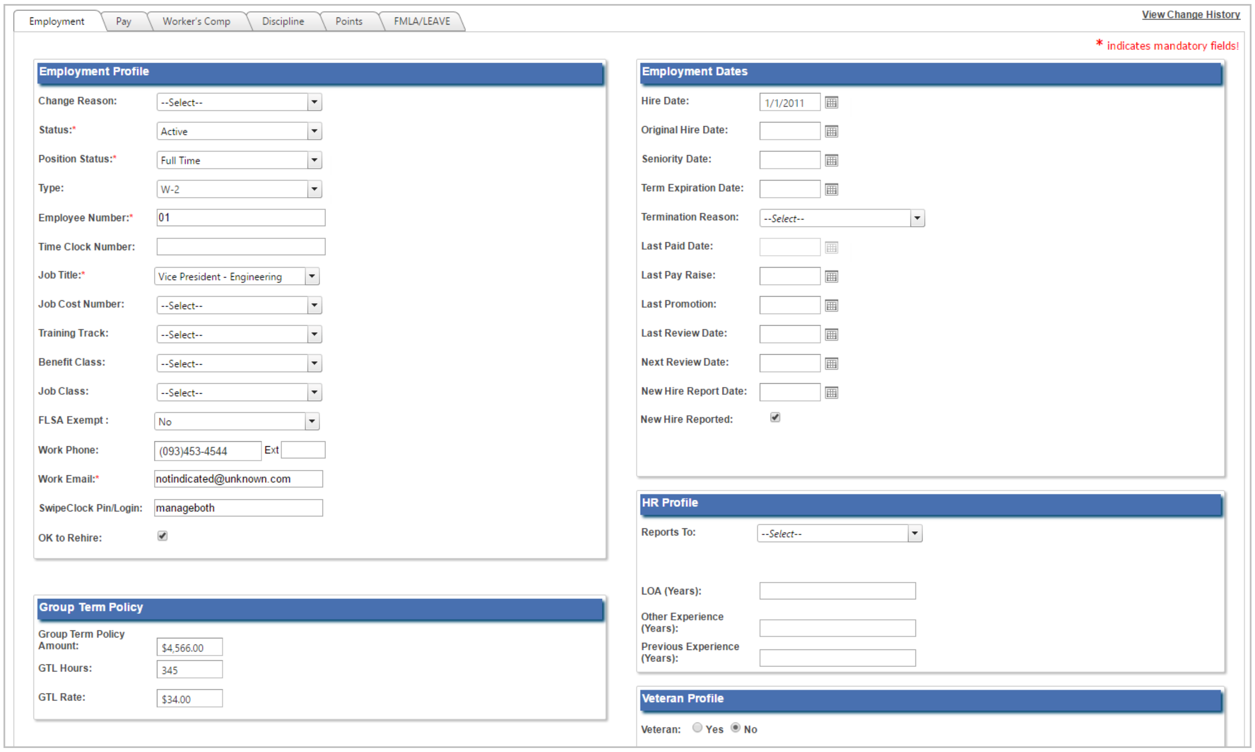


Delivery

Employee-Employment

Employment

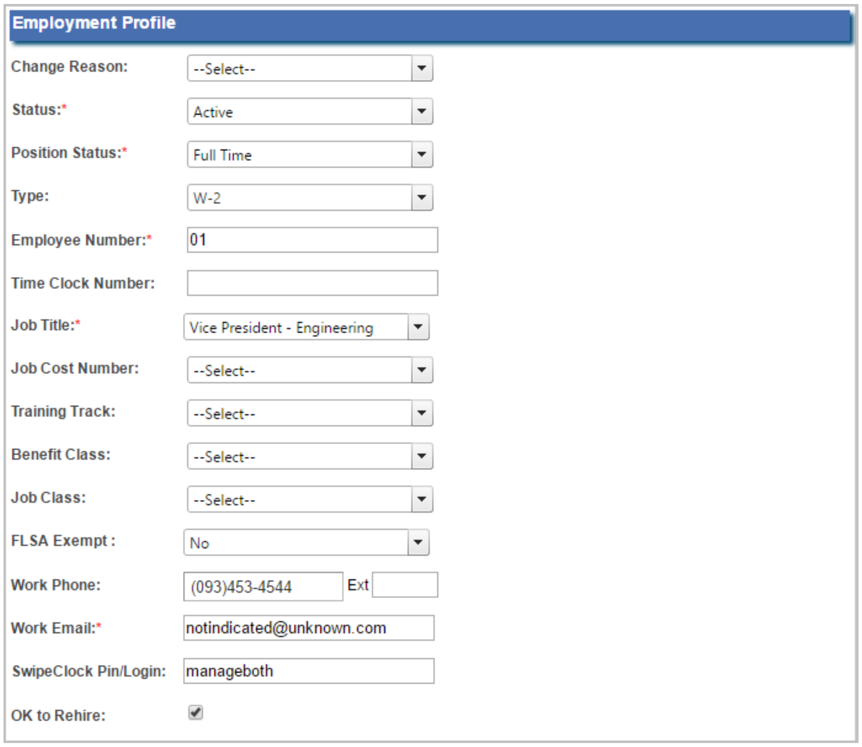
The Employment screen contains employment profile information, such as employment dates, job title, and work contact information. Government regulatory information, such as Vets 100 and Worker's Compensation information, is also stored on this screen. The employee's manager can also be added on this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



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

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

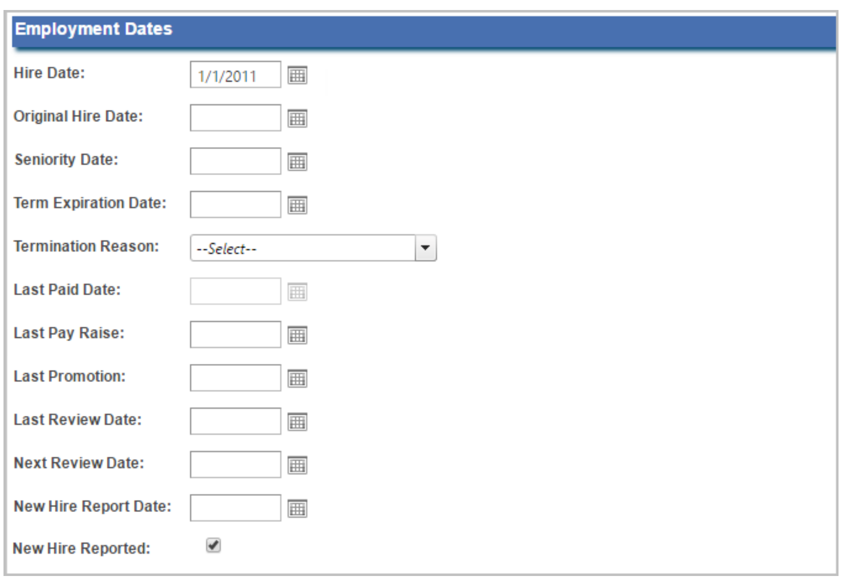
Employment Profile



Employment Profile

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

Employment Dates



Employment Dates

Hire Date:	1/1/2011
Original Hire Date:	
Seniority Date:	
Term Expiration Date:	
Termination Reason:	--Select--
Last Paid Date:	
Last Pay Raise:	
Last Promotion:	
Last Review Date:	
Next Review Date:	
New Hire Report Date:	
New Hire Reported:	☑

Group Term Policy

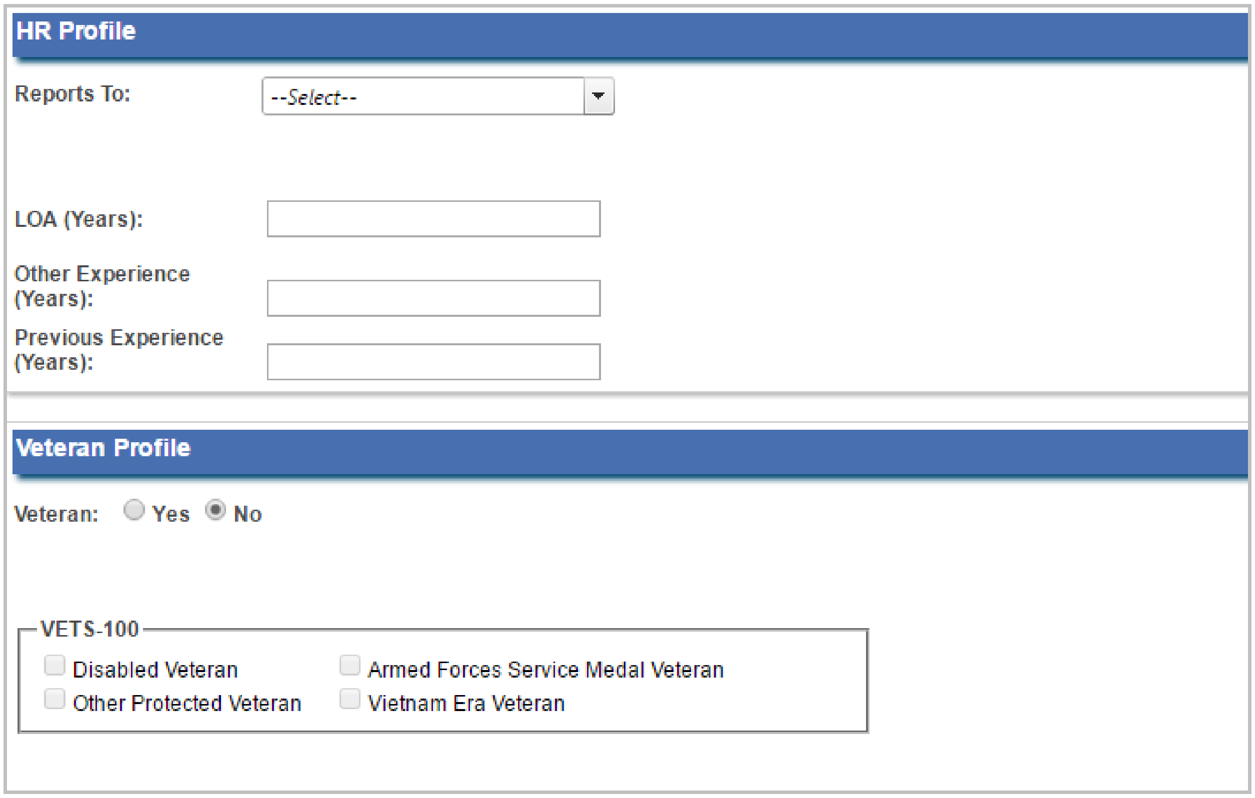

Group Term Policy

Group Term Policy Amount: $4,566.00

GTL Hours: 345

GTL Rate: $34.00

HR Profile and Veteran Profile


HR Profile

Reports To: --Select--

LOA (Years):

Other Experience (Years):

Previous Experience (Years):

Veteran Profile

Veteran: Yes No

VETS-100

Disabled Veteran

Armed Forces Service Medal Veteran

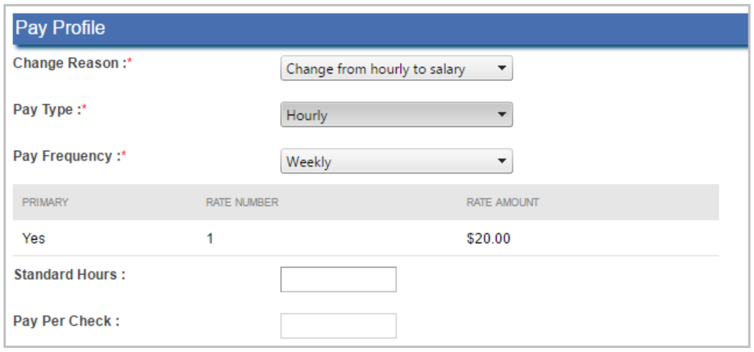
Other Protected Veteran

Vietnam Era Veteran

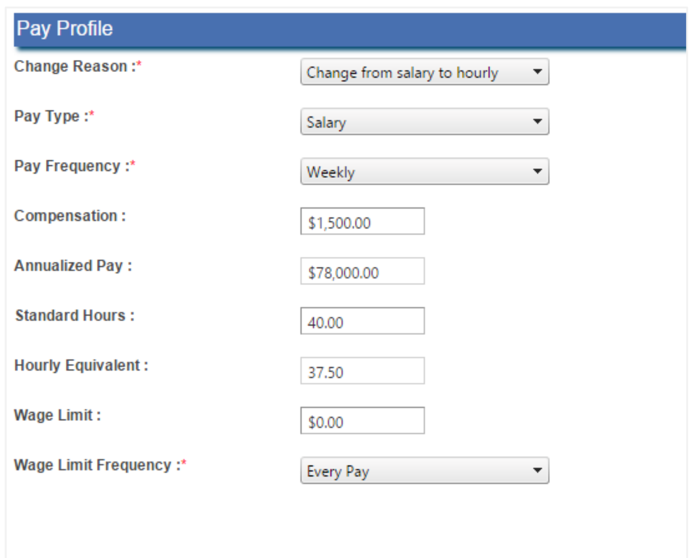
Pay

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

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



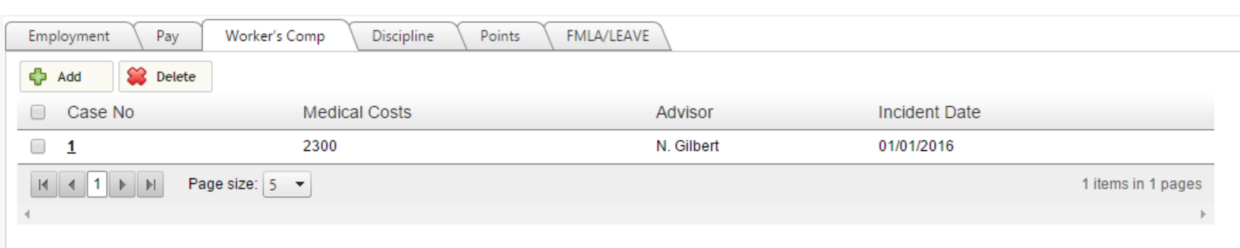
- **Salaried Employees** wage amounts are entered here on the Employee – Employment – Pay menu.



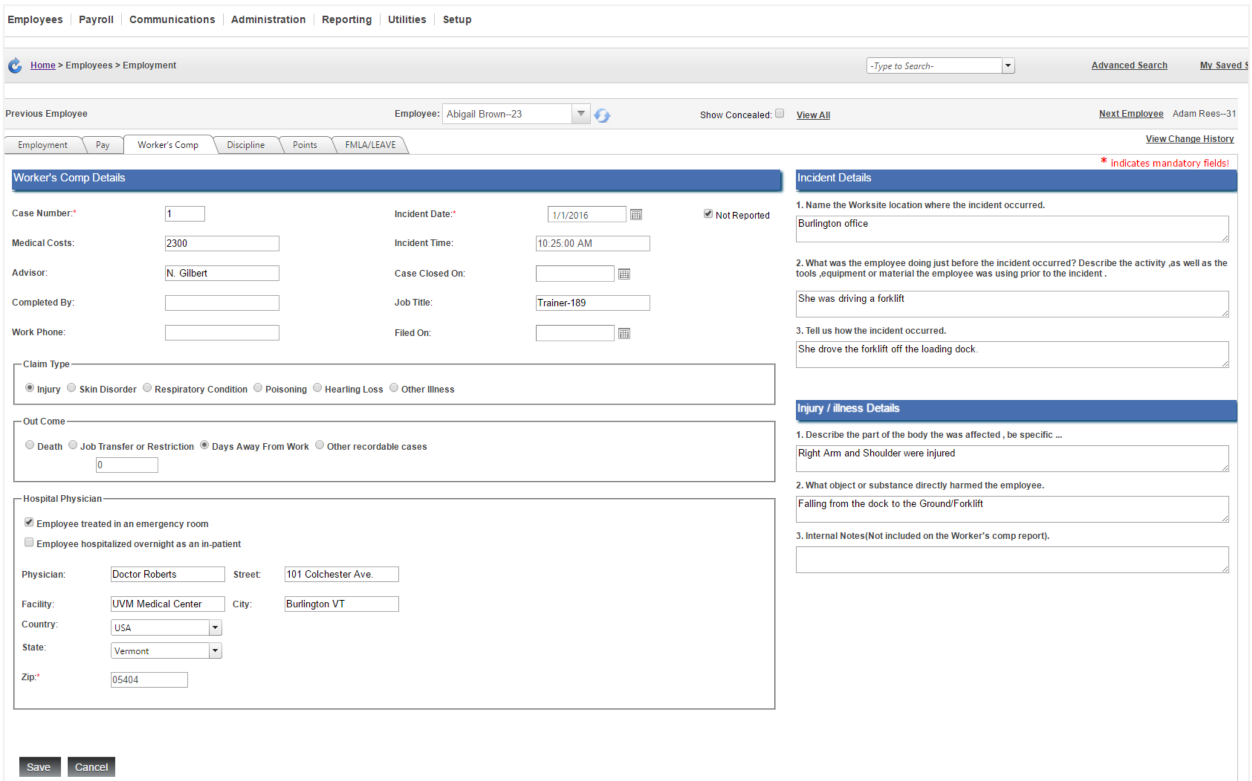
Workers Comp

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

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



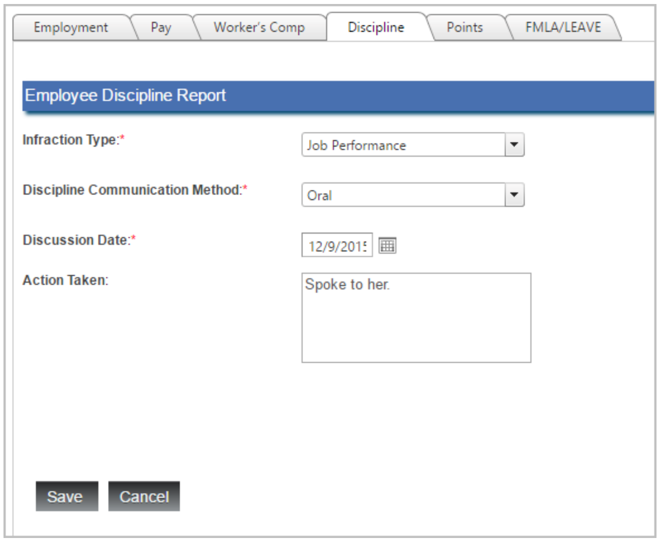
3. Complete all pertinent information.
4. Click **Save** when complete.



Discipline

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

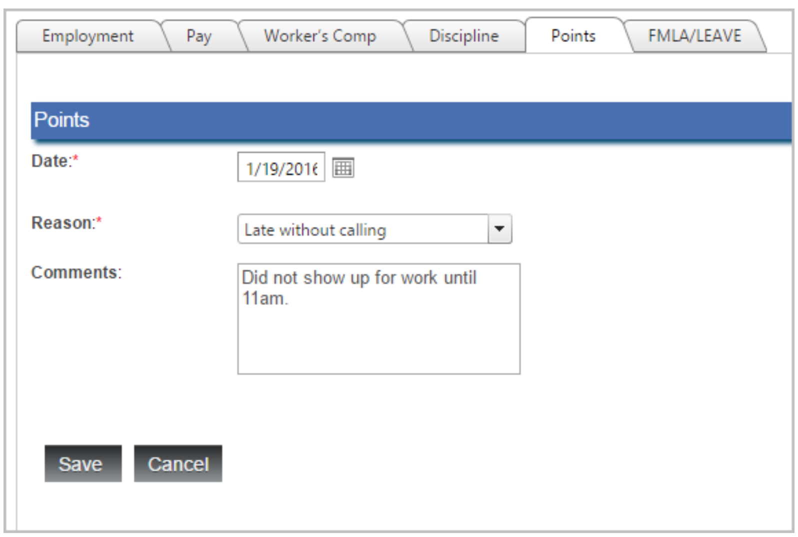
1. Go to **Employees – Employment – Discipline** tab.
2. Click on **Add**.
3. Enter the following information:
   - Infraction Type
   - Discipline Communication method
   - Discussion Date
   - Action Taken
4. Click **Save** when complete.



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

Points

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



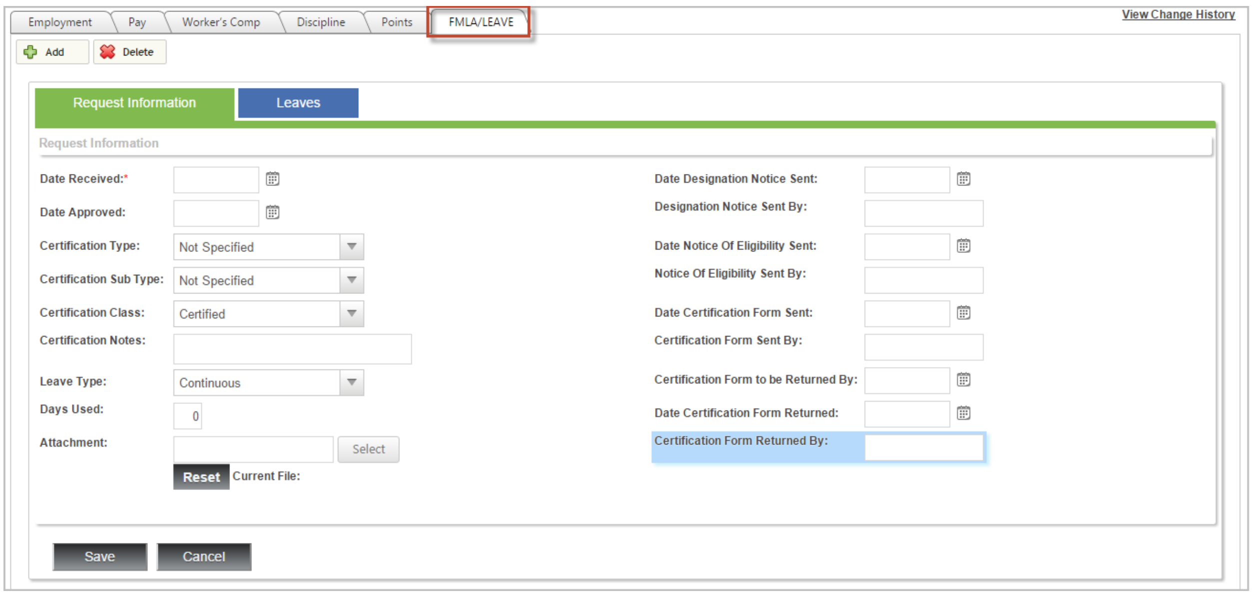
Note: To utilize the Points, reasons must be added in the Default Tables Setup – Employment Profile – Points – Reason.

FMLA/Leave

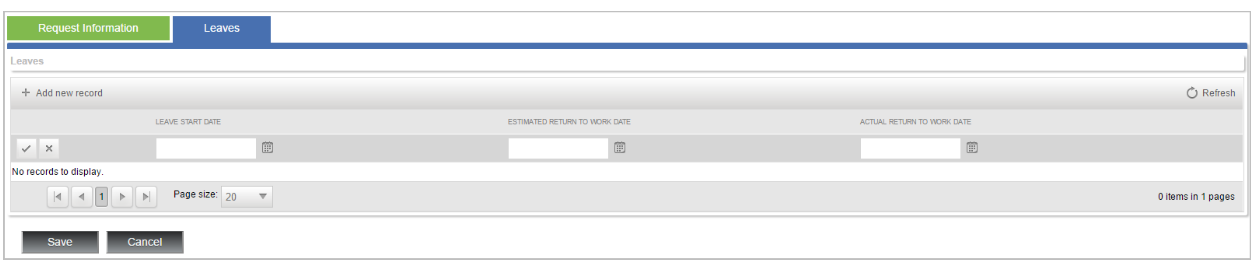
The Family and Medical Leave Act (FMLA) entitles eligible employees of covered employers to take unpaid, job-protected leave for specified family and medical reasons. FMLA/Leave information is entered into Advanced HR on the **Employees** – **Employment** – **FMLA/Leave** tab.

To enter FMLA/Leave information:

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



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

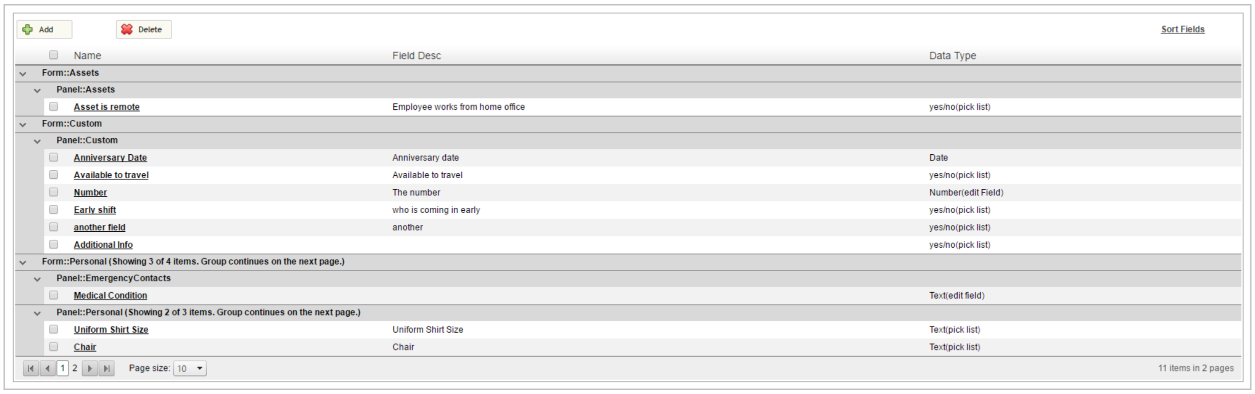


5. Use the button to save the Leave record.
6. Click on **Save** when complete.

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

Custom Form

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



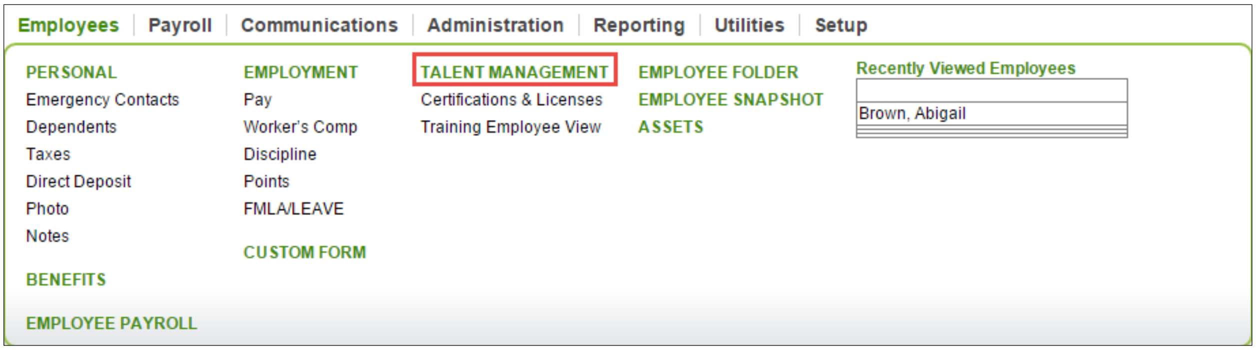
Add Delete Sort Fields

Name	Field Desc	Data Type
Form::Assets		
Panel::Assets		
Asset is remote	Employee works from home office	yes/no(pick list)
Form::Custom		
Panel::Custom		
Anniversary Date	Anniversary date	Date
Available to travel	Available to travel	yes/no(pick list)
Number	The number	Number(edit Field)
Early shift	who is coming in early	yes/no(pick list)
another field	another	yes/no(pick list)
Additional Info		yes/no(pick list)
Form::Personal (Showing 3 of 4 items. Group continues on the next page.)		
Panel::EmergencyContacts		
Medical Condition		Text(edit field)
Panel::Personal (Showing 2 of 3 items. Group continues on the next page.)		
Uniform Shirt Size	Uniform Shirt Size	Text(pick list)
Chair	Chair	Text(pick list)

1 2 Page size: 10 — 11 items in 2 pages

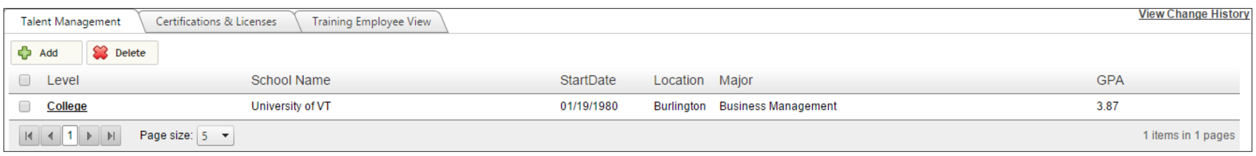
Employees-Talent Management

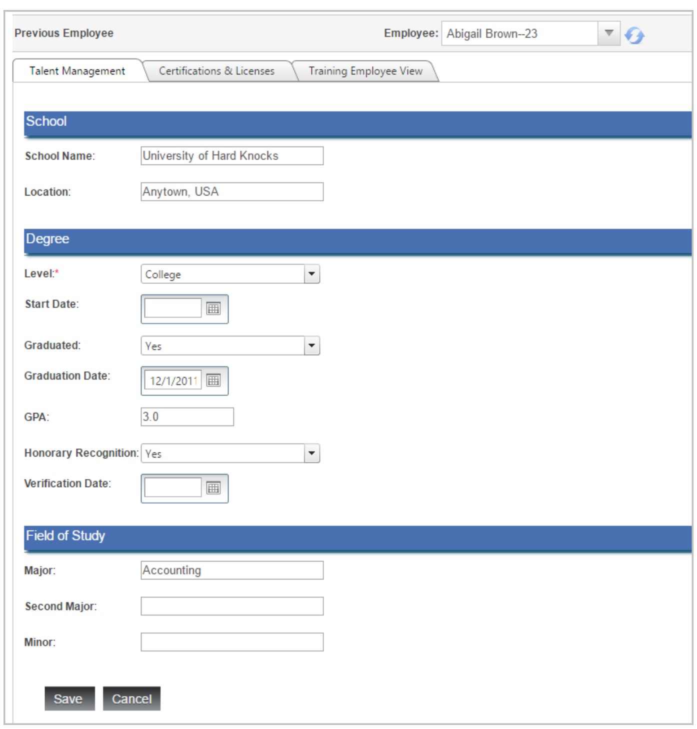
The Talent Management screens allow you to record significant information in regard to an employee's education, training and certifications, as well as view the status of company trainings in which the employee has enrolled and has completed.



Talent Management

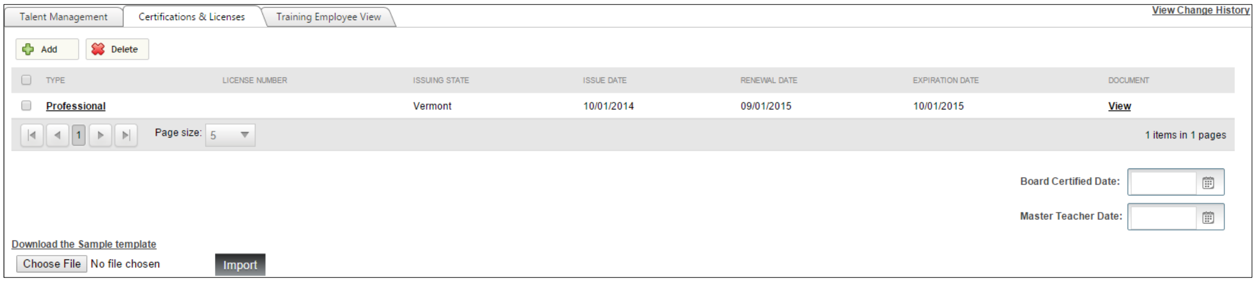
Talent Management holds employee schooling information. You can track schooling, degrees, and field of study for each school entered.





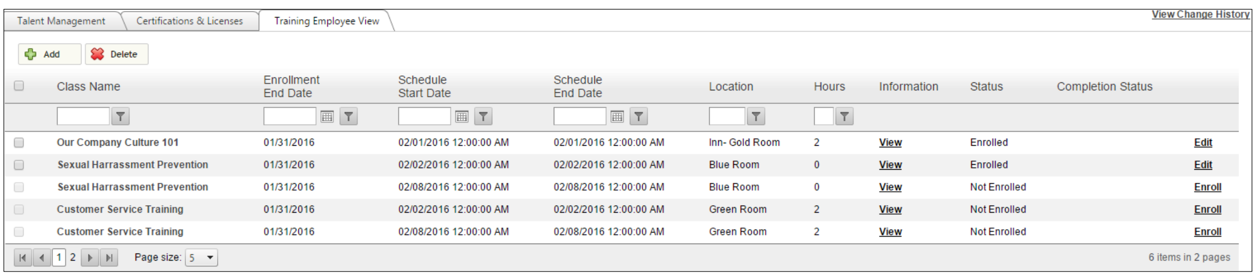
Certifications & Licenses

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



Training Employee View

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



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

Employee Folder

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

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

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

To upload files to the employee folder:

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

Note: Employment and Personal categories are listed by default. Additional categories can be entered in Setup – Default Table Setup – I9 Documents – Document Category menu.

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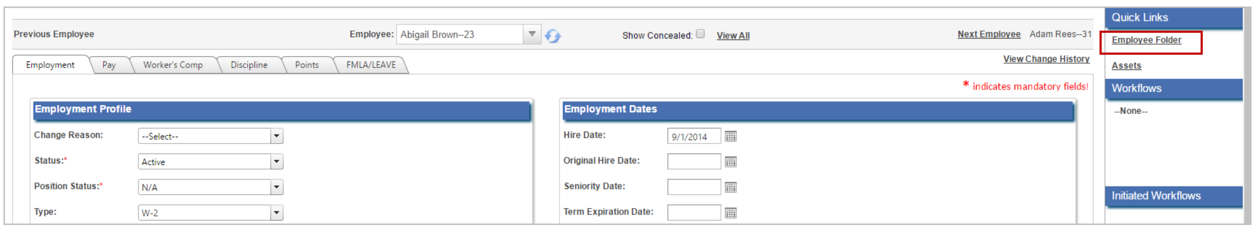
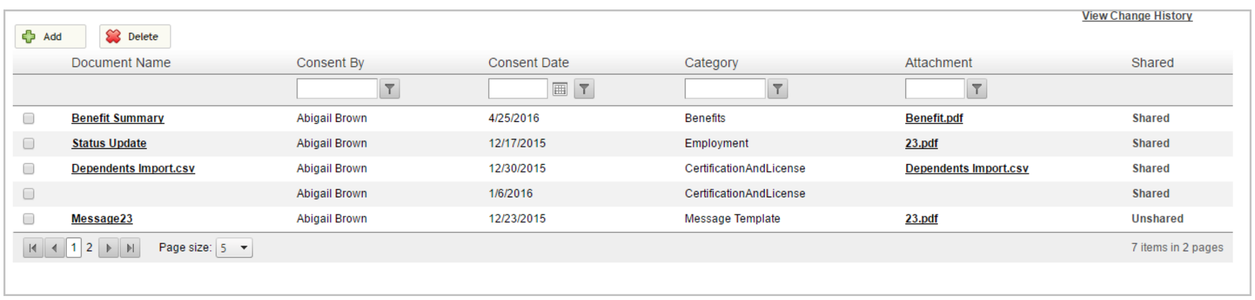
5. Click on **Choose File**, and then select the file to upload.
6. Select the **Share Document with Employee** button if the employee should have access to this document in the Employee Portal.

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



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

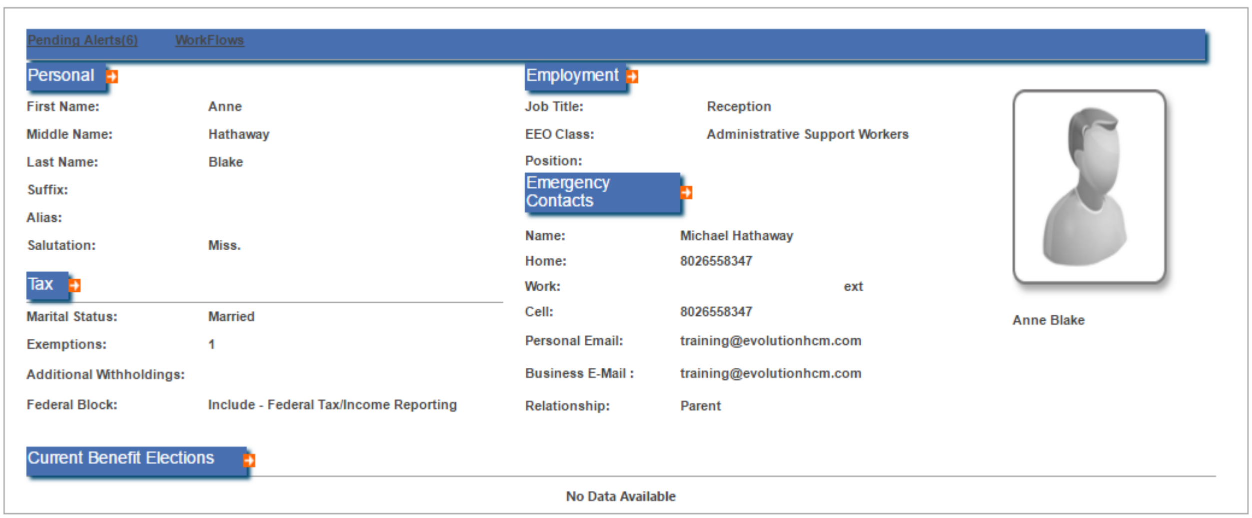


Document Name	Consent By	Consent Date	Category	Attachment	Shared
Benefit Summary	Abigail Brown	4/25/2016	Benefits	Benefit.pdf	Shared
Status Update	Abigail Brown	12/17/2015	Employment	23.pdf	Shared
Dependents Import.csv	Abigail Brown	12/30/2015	CertificationAndLicense	Dependents Import.csv	Shared
	Abigail Brown	1/6/2016	CertificationAndLicense		Shared
Message23	Abigail Brown	12/23/2015	Message Template	23.pdf	Unshared

Employee Snapshot

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

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



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

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

Assets

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

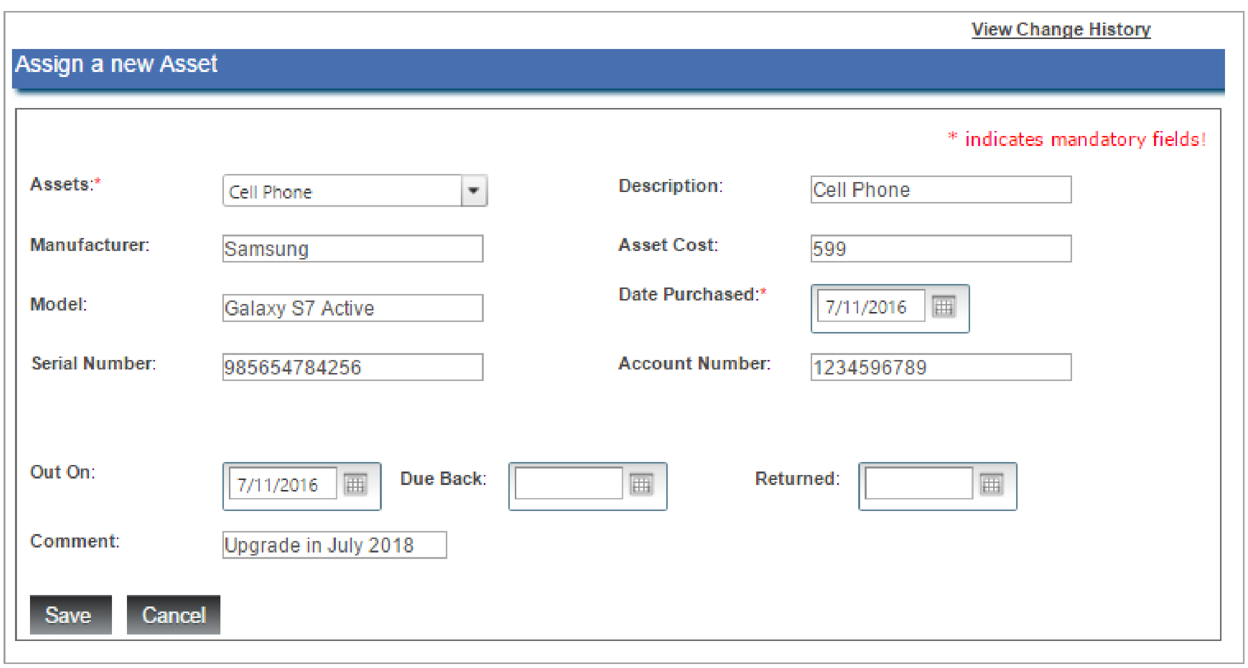
- Cell Phone
- Company Vehicle
- Computer
- Fax Machine
- Laptop
- Printer

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

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

To assign an asset to an employee:

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



Common Tasks

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

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

New Hire Workflow

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

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

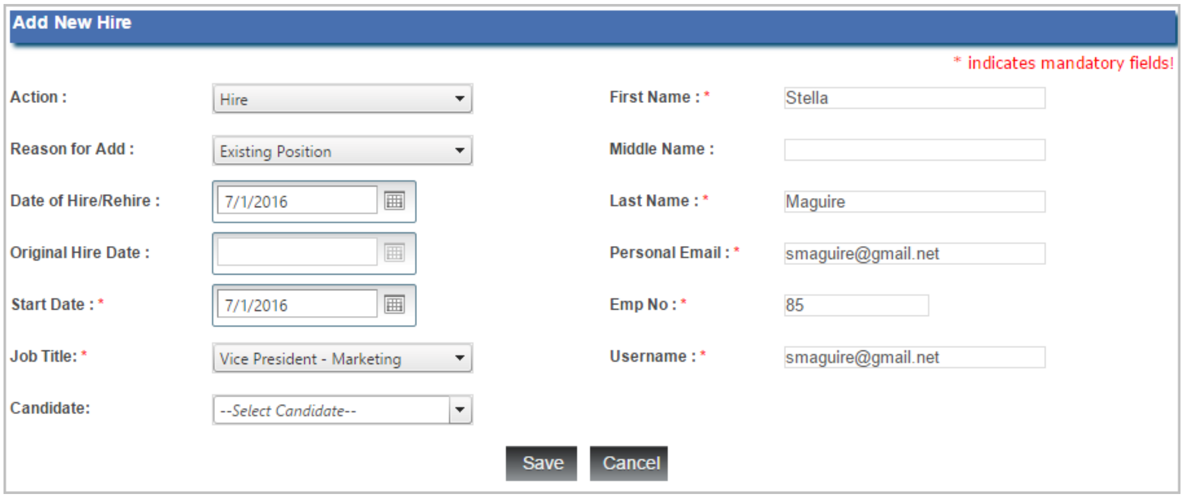
Please note that additional setup of a new employee is required within the Employees – Employee Payroll screen. This includes adding any State and local taxes that are applicable to the new hire.

Adding a new hire manually

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

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

2. Fill in the required information.



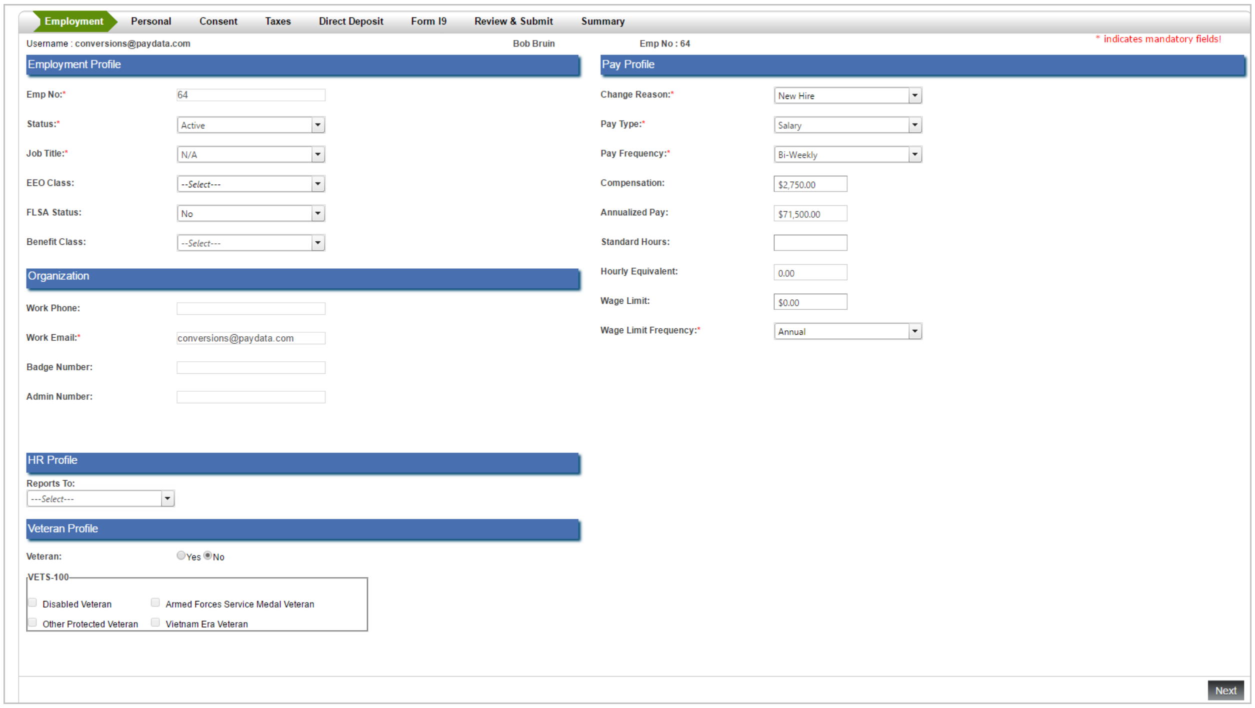
Note: Field Names in the application followed by a red asterisk (*) indicate mandatory fields in Advanced HR.

Add New Hire

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

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

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



Employment Profile

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

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

Organization

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

HR Profile

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

Veterans Profile

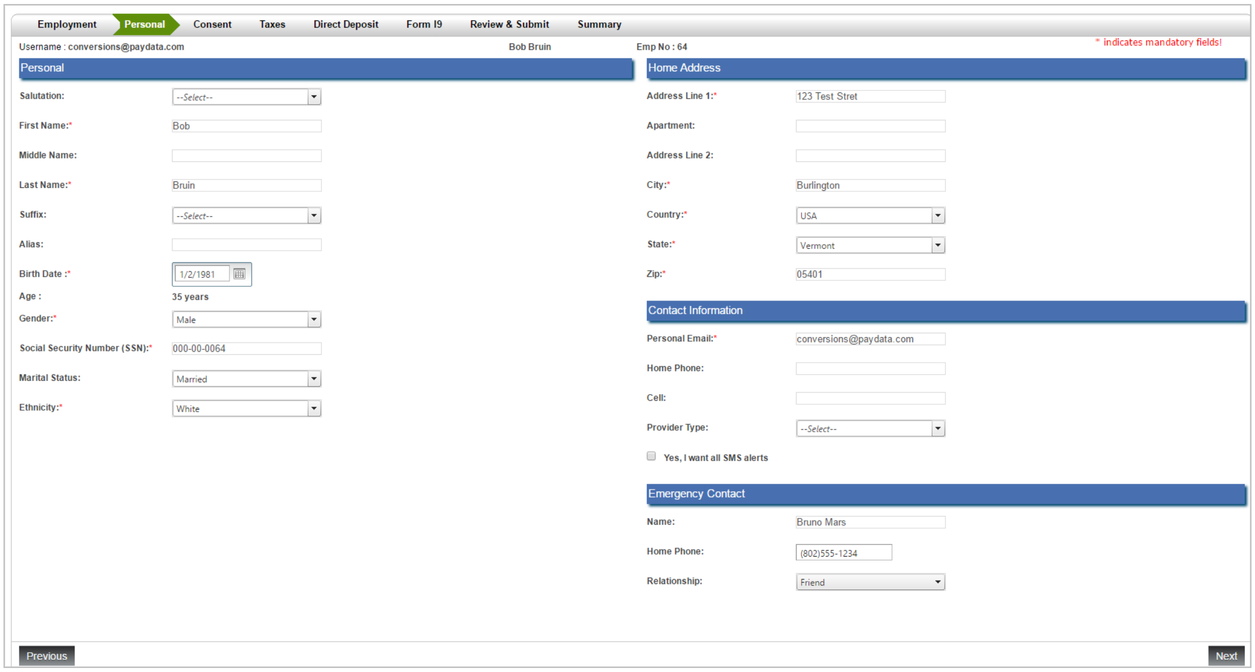
Field / Button	Description
Veteran	**Yes** or **No** option button indicates whether the new hire is a Veteran.
Disabled Veteran	Check box indicates new hire is a Disabled Veteran.
Other Protected Veteran	Check box indicates new hire is Other Protected Veteran.
Armed Forces Service Medal Veteran	Check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

Pay Profile

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

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

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



Personal

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

Home Address

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

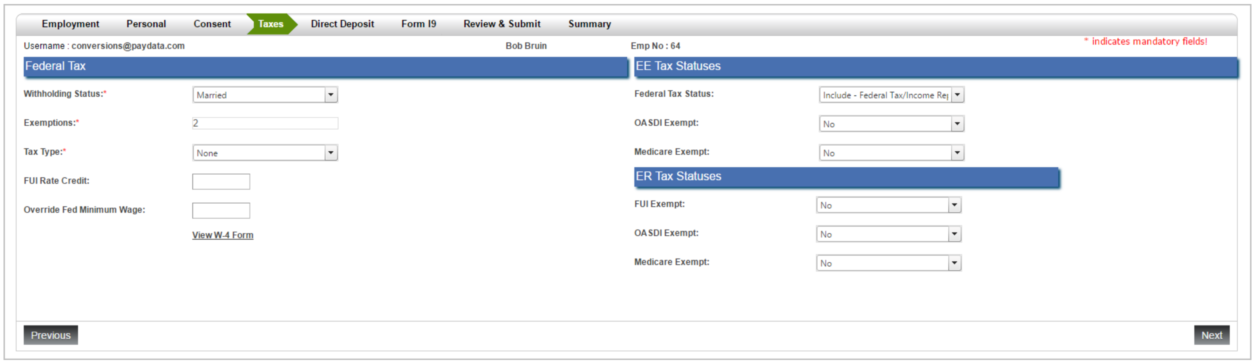
Contact Information

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

Emergency Contact

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

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



Federal Tax

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

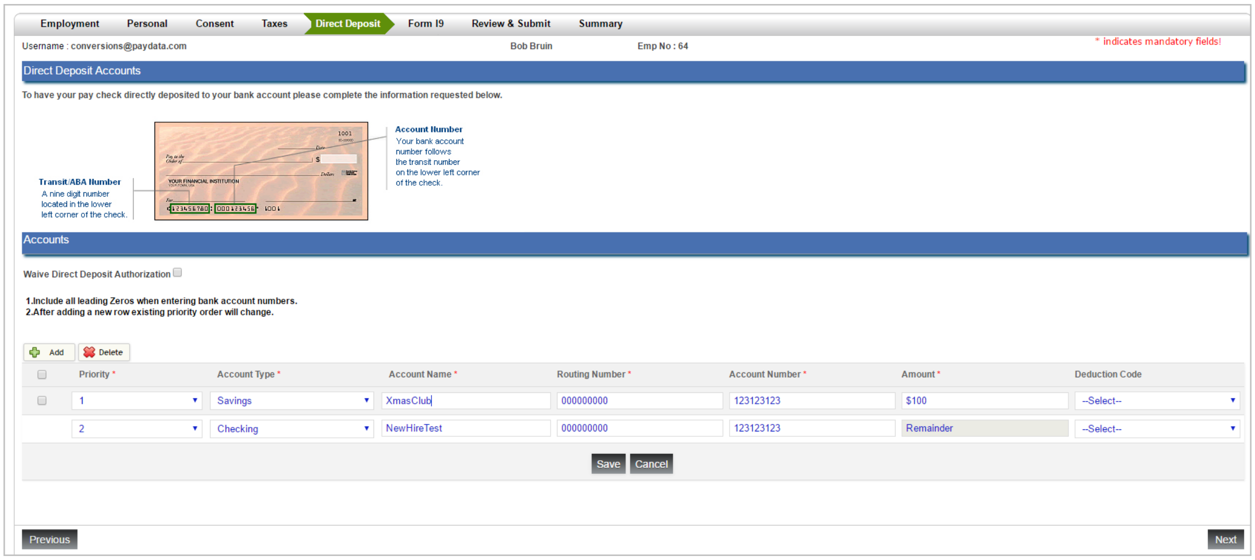
EE Tax Statuses

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

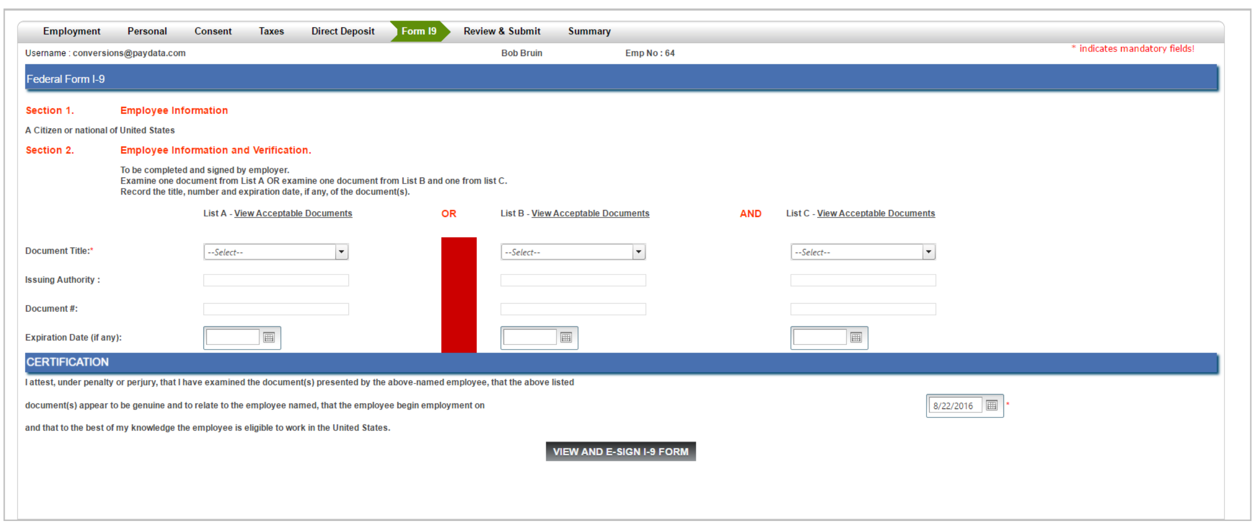
ER Tax Statuses

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

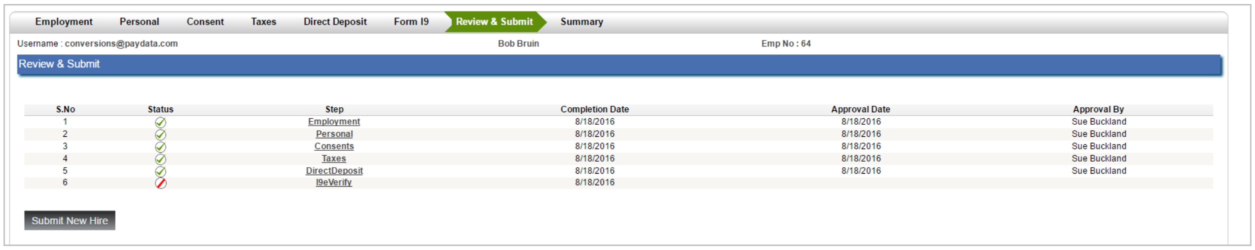
8. Once all information is entered, click on **View W-4 Form**. This can be electronically signed by the employee at this time. Once information is completed in this section, an electronic W-4 form is available for review and approval once completed, click **Next**.
9. On the **Direct Deposit** tab,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



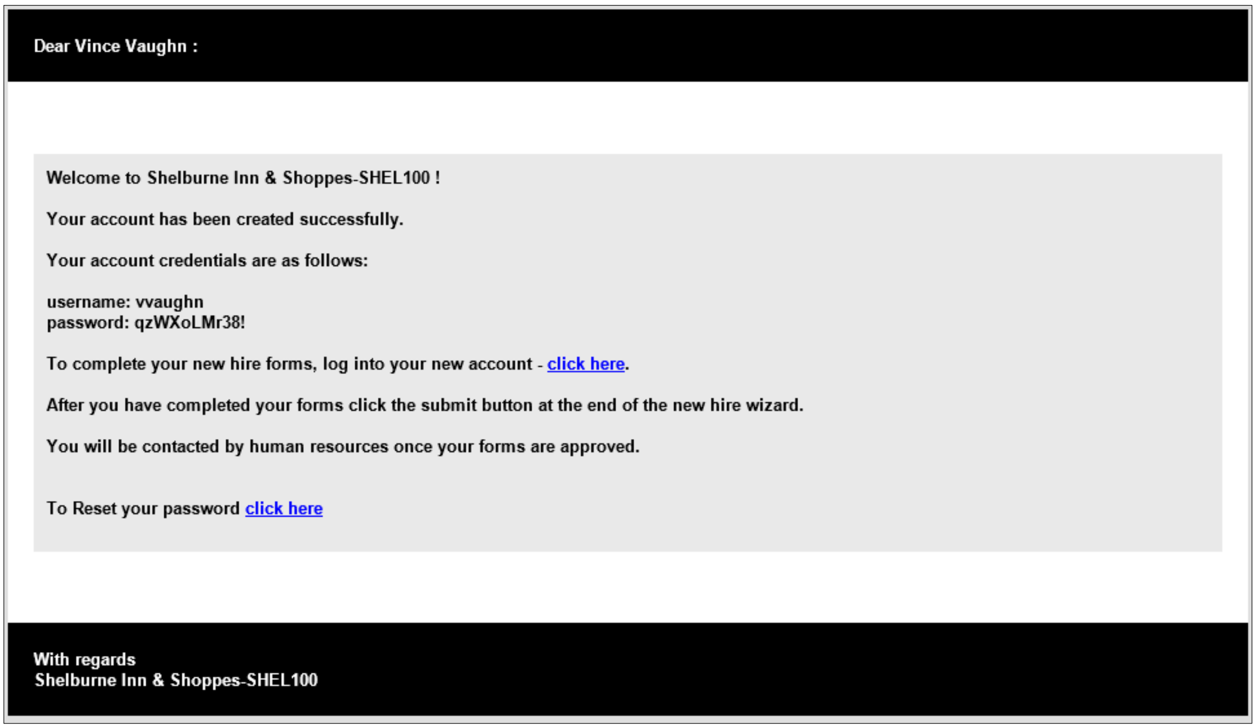
10. On the **Form I9** tab, enter the employee's I-9 information. Upload copies of the Identification Documents by clicking **Select** next to the **Attachment** field.



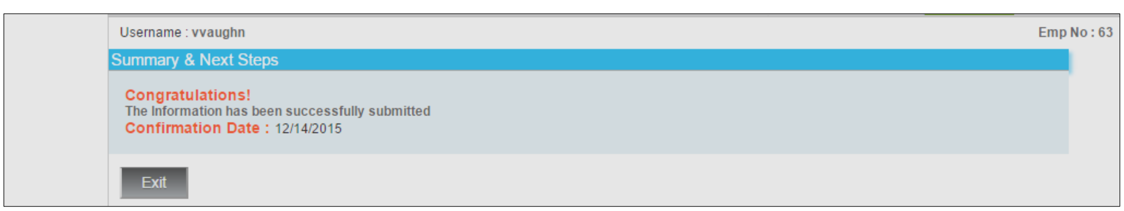
11. Click **Next** when complete.
12. On the **Review and Submit** tab, users can review any information entered by clicking on the name of the step. Review the status of each section to confirm completion of the new hire data entry. If a status is incomplete, click the hyperlink of the incomplete step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



13. Once all sections are complete, click the **Submit** button to move the new hire to employee status.
14. The new hire will receive a notification email inviting them to log into Advanced HR. If an offer letter template was selected at the beginning of the Add New Hire process, the employee will also receive that letter.



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



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

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

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

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

Self-Service Onboarding

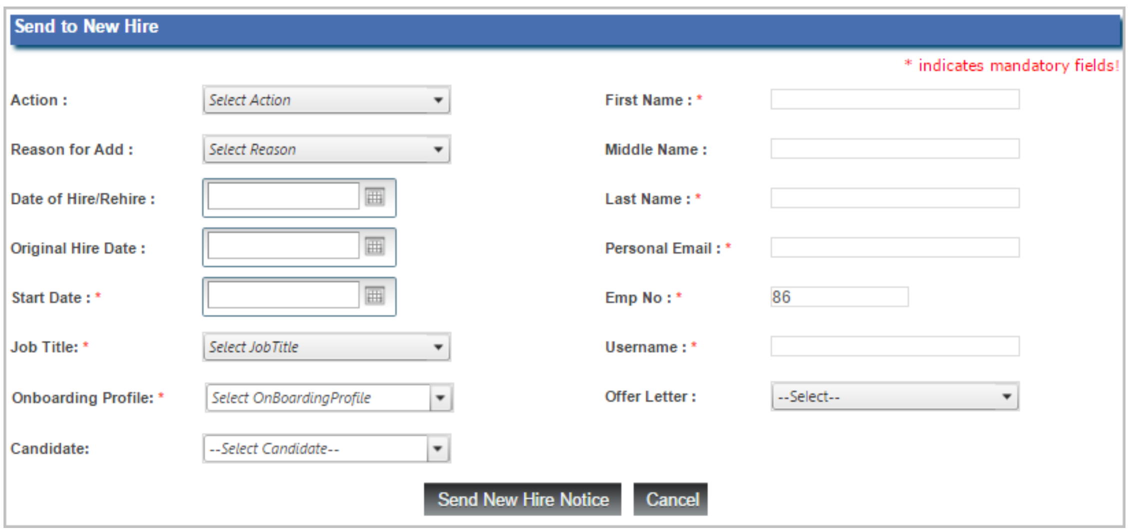
Self Service Onboarding will allow the company to have the new employee enter a portion of their own information through a Self Service Portal. You can also provide documents to new hires, and require them to electronically sign consent forms like handbooks and policies. The company new hire documents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

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

The HR Administrator performs the following tasks:

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

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

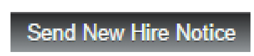


2. On the **Send to New Hire** screen, enter the basic new hire information – required fields are those fields marked with a red asterisk (*).

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

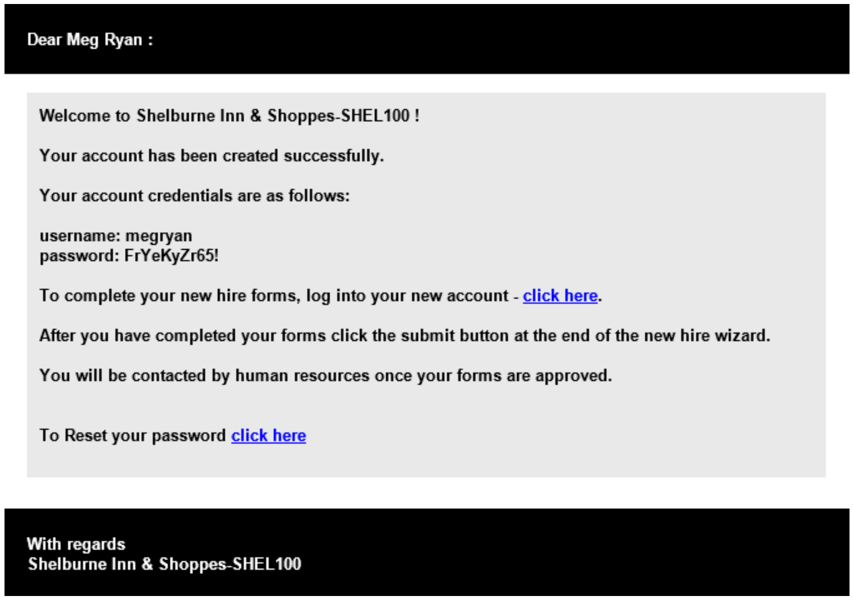
Field	Description
Job Title	Enter the job title you are hiring the new hire into. This will help to fill in Job duties and other information in later steps.
Onboarding Profile	Selecting the Onboarding Profile to be used for this new hire and the system will attach the appropriate new hire packet to this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

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



The new hire then completes these tasks:

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



Dear Meg Ryan :

Welcome to Shelburne Inn & Shoppes-SHEL100 !

Your account has been created successfully.

Your account credentials are as follows:

username: megryan
password: FrYeKyZr65!

To complete your new hire forms, log into your new account - click here.

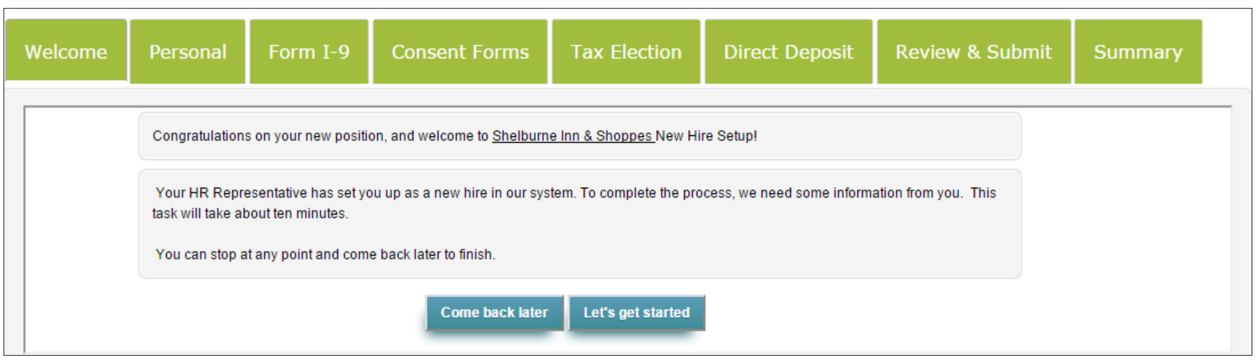
After you have completed your forms click the submit button at the end of the new hire wizard.

You will be contacted by human resources once your forms are approved.

To Reset your password click here

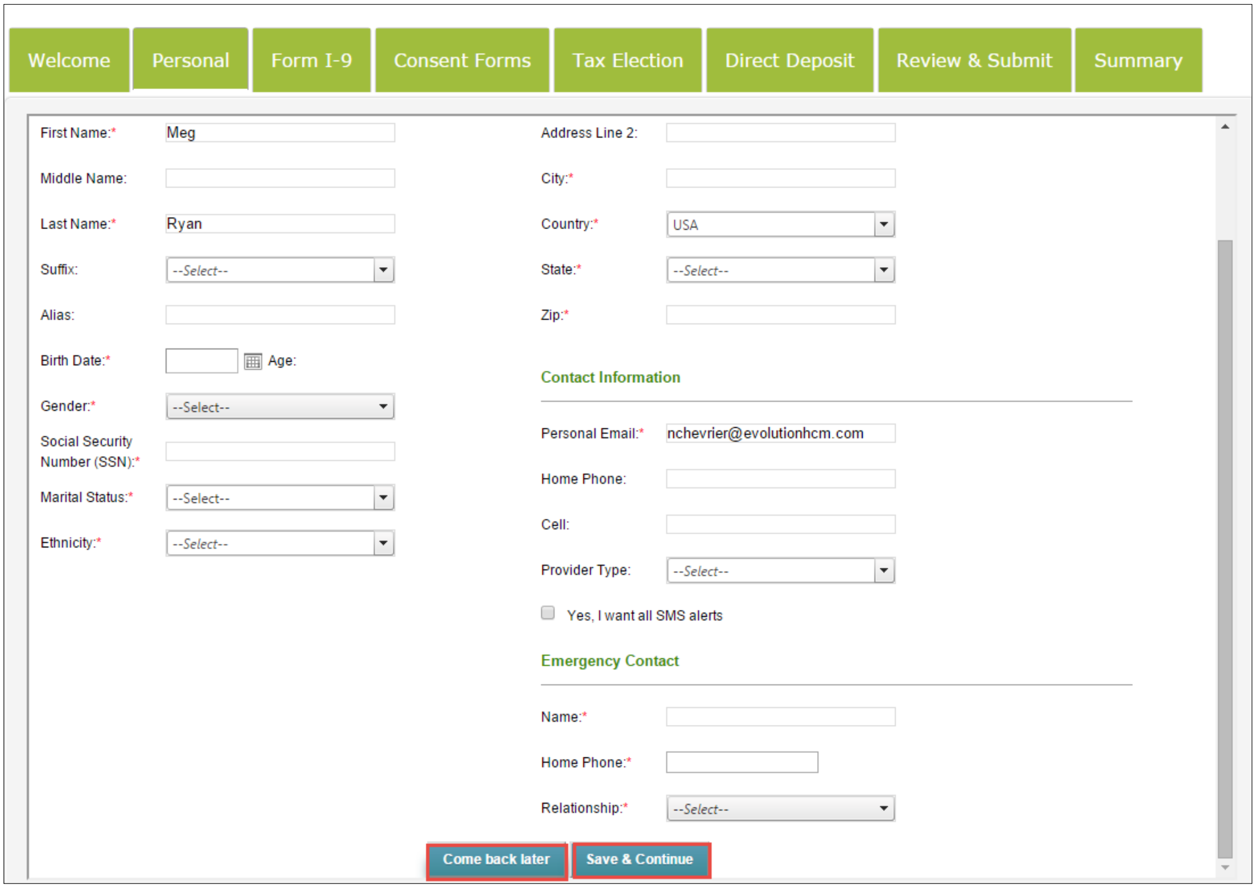
With regards
Shelburne Inn & Shoppes-SHEL100

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



Note that the Welcome message can be customized.

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



Personal

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

Home Address

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

Contact Information

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

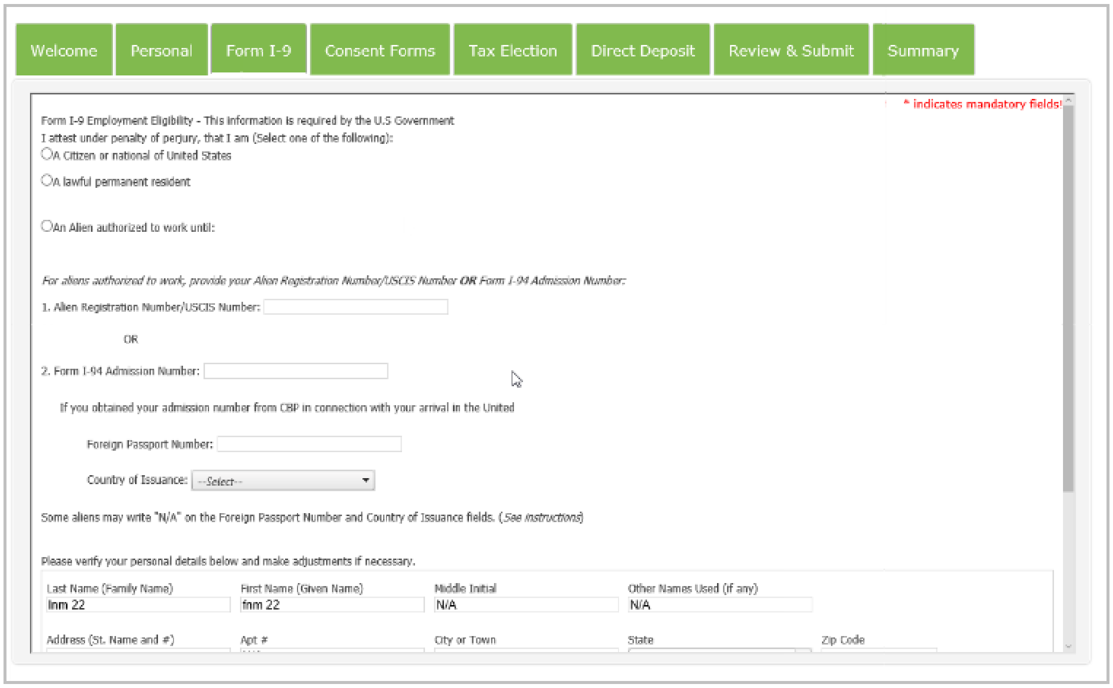
Emergency Contact

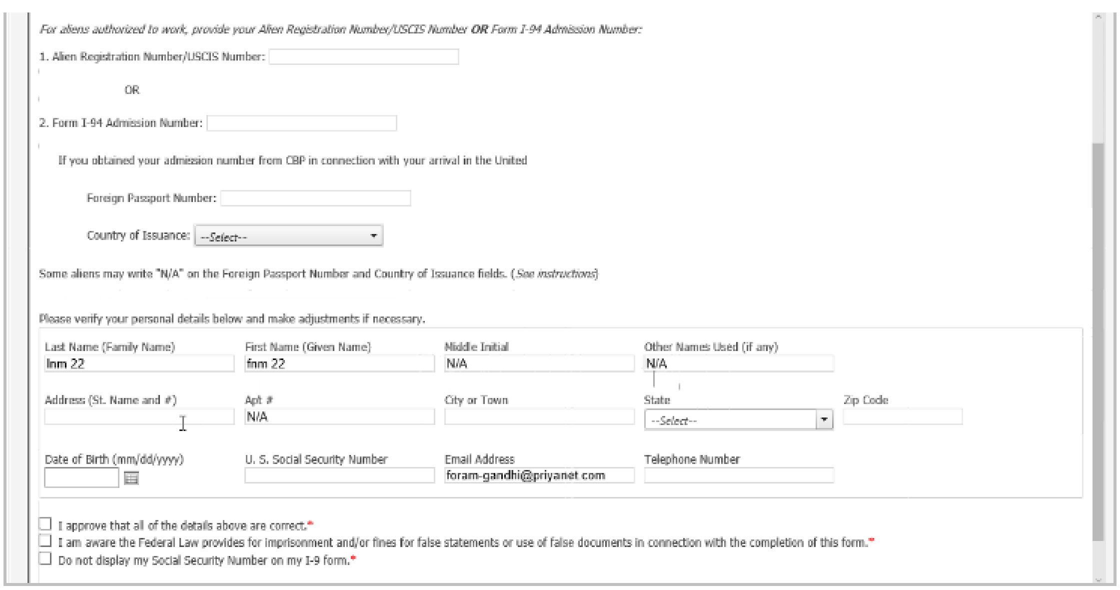
Field	Description
Name	Name of Employee's Emergency Contact.
Home Phone	Home Phone Number of Employee's Emergency Contact.
Relationship	Relationship of the Emergency Contact to the Employee.

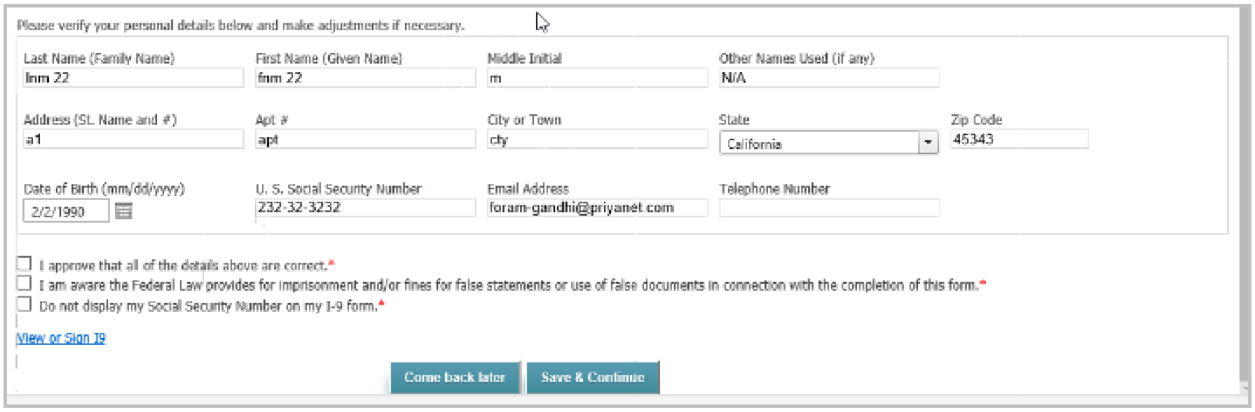
Form I-9

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

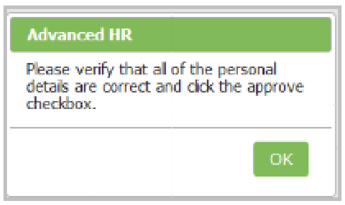
The following three screenshots show a sample of the I-9 screen – scrolling downward to show the entire screen:



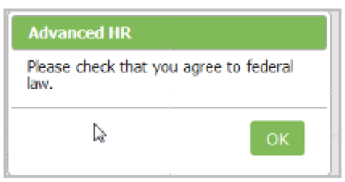




The user must click the "I approve that all of the details above are correct" check box. If the user has not, they receive the following message box.

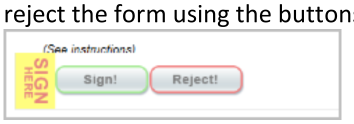


The user must click the "I am aware of the Federal law … " check box. If not, they receive the following message box.

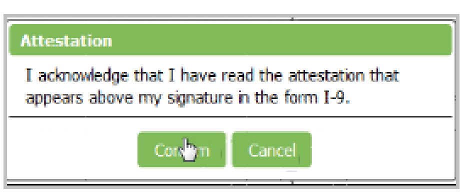


After clicking both check boxes, the user clicks the **View or Sign I9** link and the system changes the bottom of the screen and presents the user with the Sign or Reject options for the I-9 as shown below.

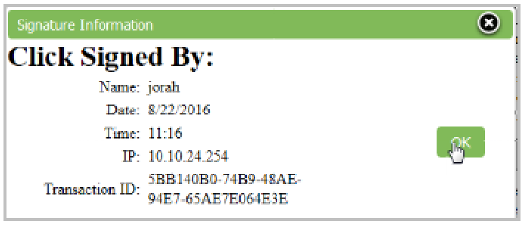
Clicking the **View or Sign I9** hyperlink provides the employee with access to the I-9 form, where they can sign or reject the form using the buttons provided. The system will create a transaction ID for auditing purposes:



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



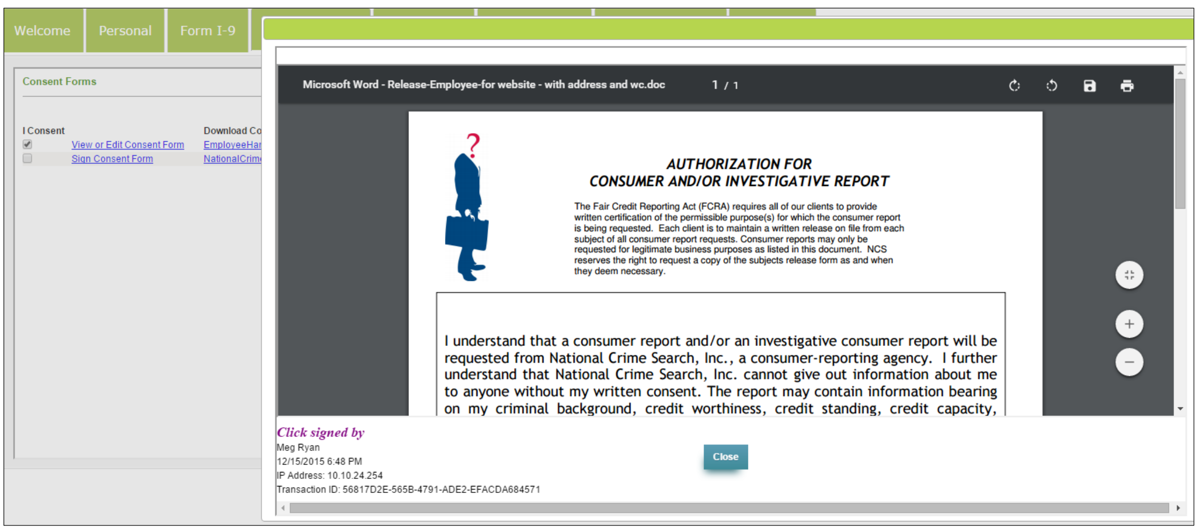
The user clicks the **Confirm** button and receives the following Signature Information message box:



Consent Forms

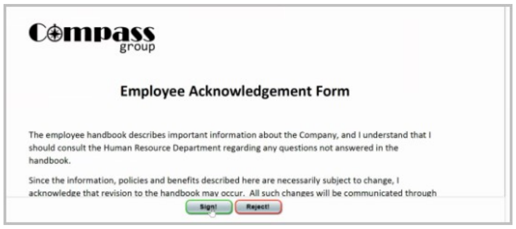
Takes the new hire through the new hire documents that have been previously loaded into the system as part of the new hire packet for the position. New hires can read consent forms, download, sign, and date them. Consent forms are tied directly to specific positions or assigned when creating the new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

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



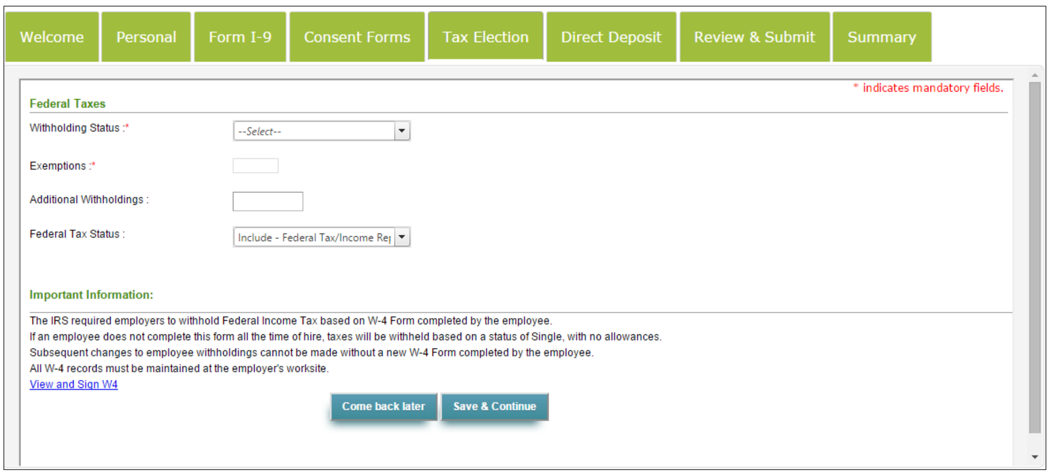
4. There is an option to allow the employee to download a form, sign it manually, and then upload the form. For more information on allowing consent form uploads, see the *Onboarding Profiles* section of this guide.

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



Tax Election

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

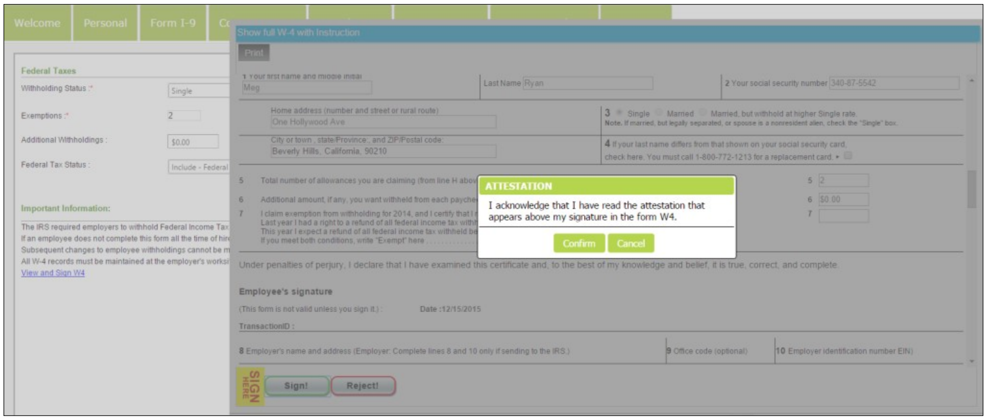


Important: The State Taxes feature of the self-service onboarding is not yet active. Until it is working, the HR Administrator will have to input the new hire's state tax information.

Federal Tax

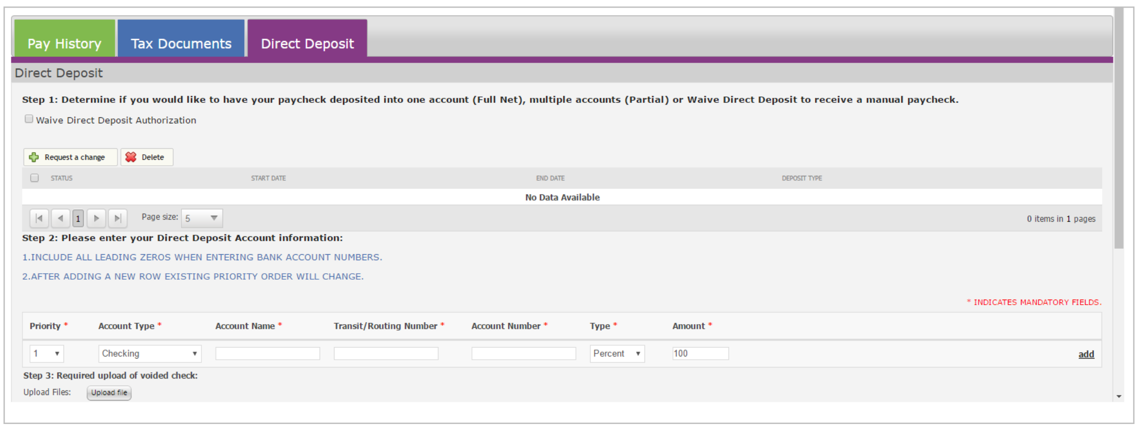
Field	Description
Withholding Status	Employee's withholding status for federal tax. The Withholding Status drop-down menu is universal for federal, state, and local taxes.
Exemptions	Number of claimed exemptions for federal tax.
Additional Withholdings	Additional dollars or percentage the employee chooses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

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



Direct Deposit

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



Review and Submit

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

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

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

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

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

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

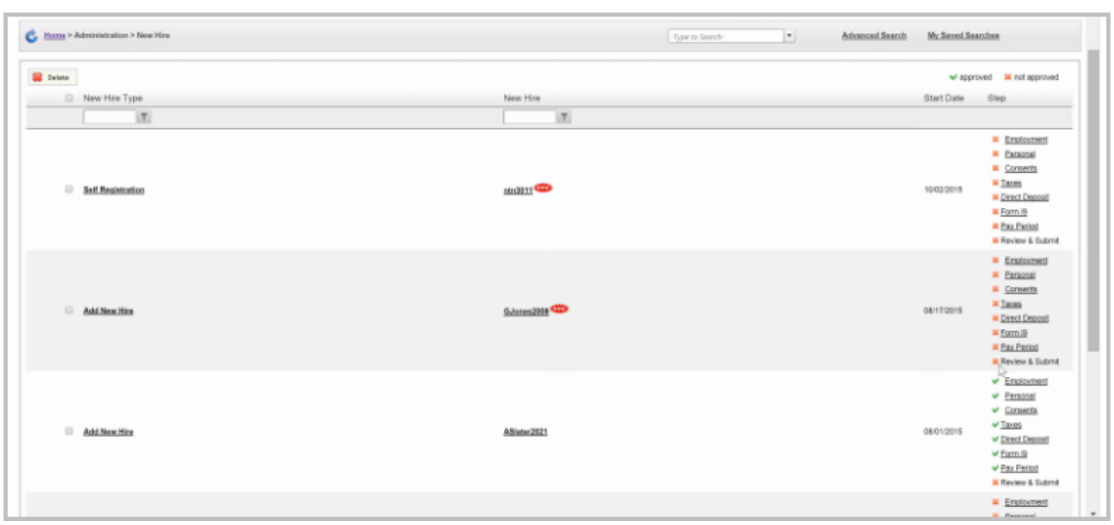
The new hire will receive a confirmation email that they have completed the Self Serve Onboarding process.

The HR Administrator then performs the review and approval task:

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

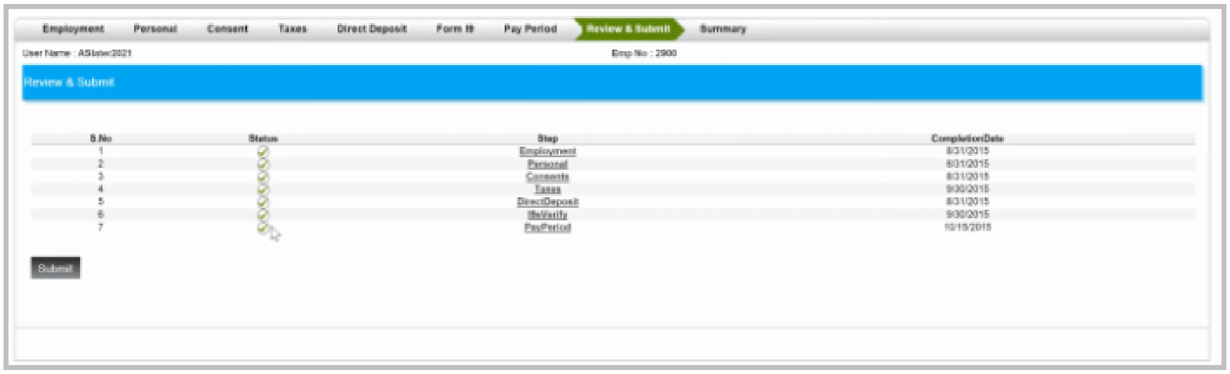
1. From the main Advanced HR screen, the HR Administrator goes to **Administration** – **New Hires**.

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



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

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



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

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

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

The HR Administrator adds Payroll Information to the new hire:

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

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

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

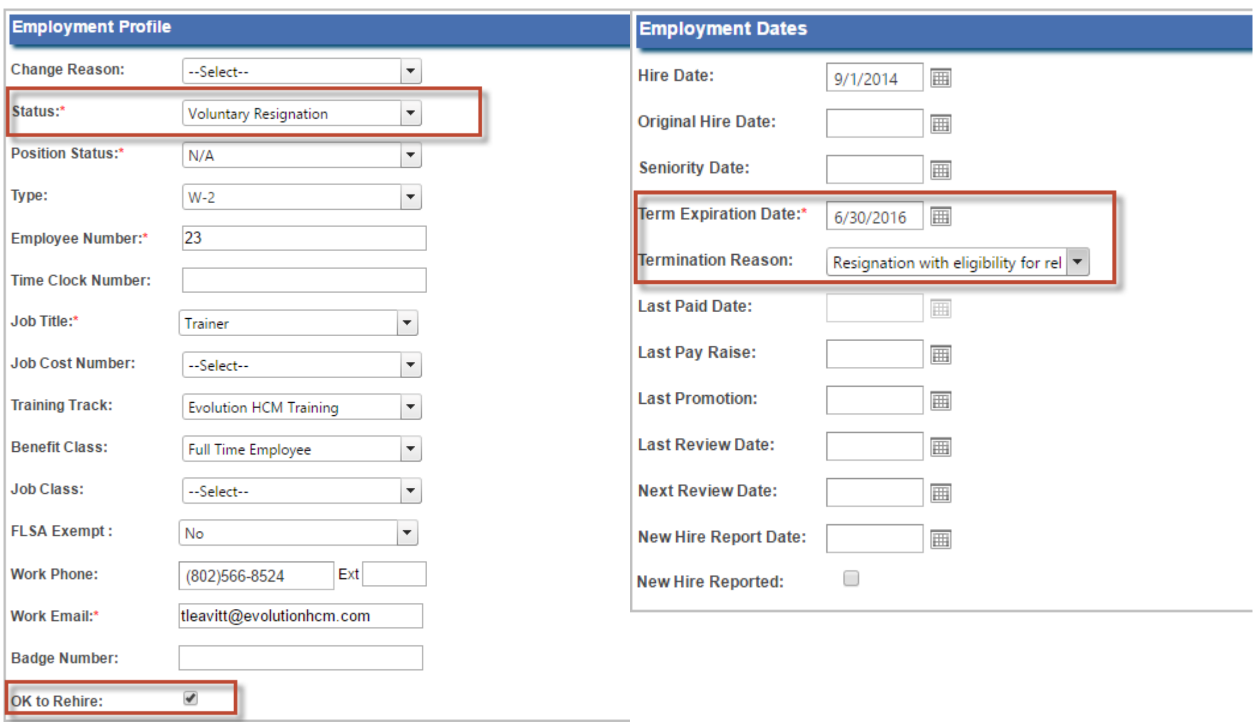
Once completed, if the employee will be logging into the Employee Portal, you can now go to **Setup – Manage Passwords** and update the employees Username and Password as needed.

Terminating an employee

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

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

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



Chapter 3: Job Titles

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

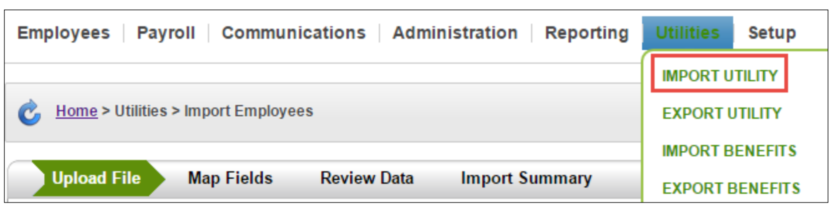
For now, we will only be adding Job Titles to the system. There are two ways to add Job Titles to Advanced HR:

- Via the Import Utility
- Using manual entry

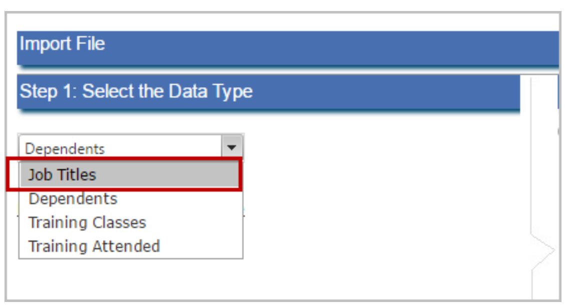
The Import Utility allows you to upload multiple Job Titles in bulk. Manual entry requires one entry for each Job Title. Multiple employees may then be assigned to a single Job Title.

Adding Job Titles via the Import Utility

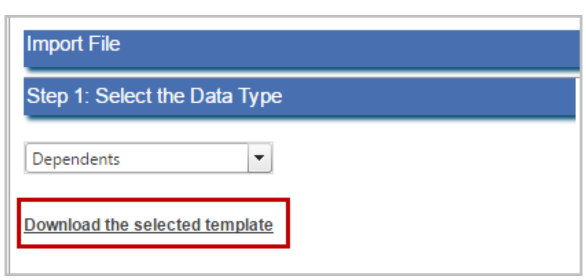
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to **Utilities – Import Utility**.



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



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



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

5. Open the Jobs Import.csv file and delete all but the first row that contains the **Job Title** and **Description** in two columns.

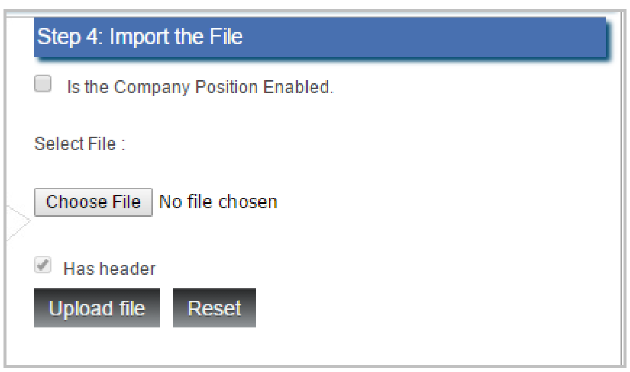
	A	B	C	D	E
1	Job Title	Description			
2	Job100	Job from Import functioanlity 1			
3	job100	Job from Import functioanlity 1			
4	job102	Job from Import functioanlity 1			
5	job103	Job from Import functioanlity 1			
6					

Jobs Import (1)

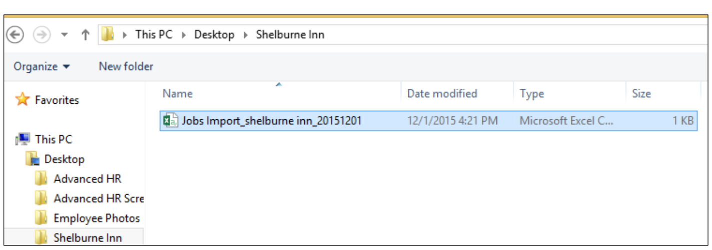
6. Populate your Job Title along with Description, one per row under the appropriate headings.

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

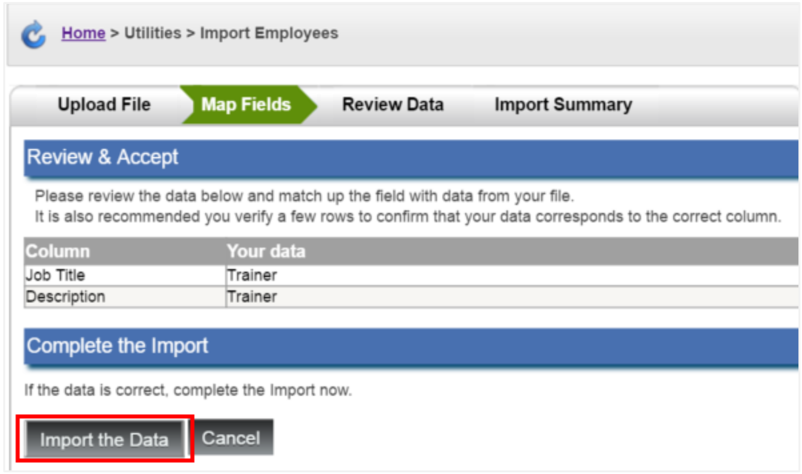
7. Save your Jobs Import.csv. You may change the file name. Leave the file type as .CSV.
8. Navigate to **Step 4: Import the File** and click **Choose File**. *Do not* put a check in the "**Is the Company Position Enabled**" box if your company does not have Position Management Enabled.



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

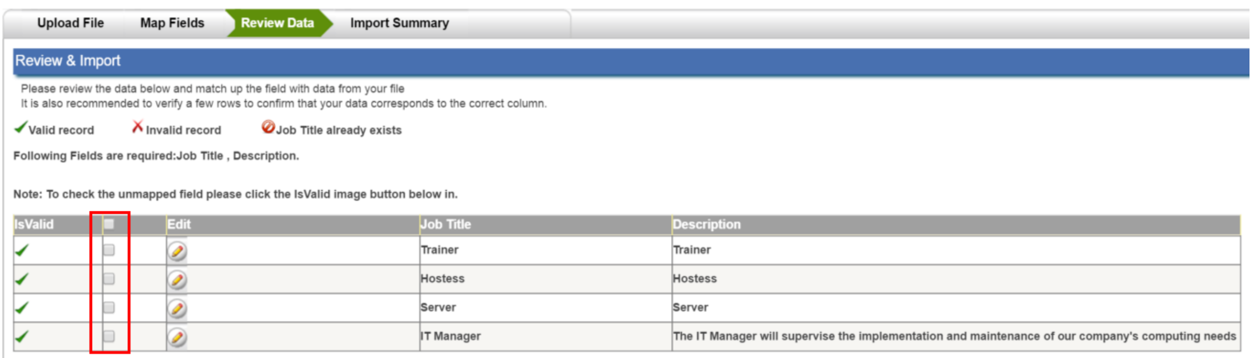


10. Click **Upload file**. Review and Accept your data. If the data is correct, click **Import the Data**.

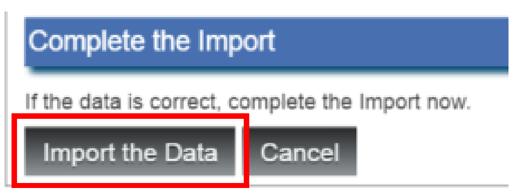


11. Review the Data.

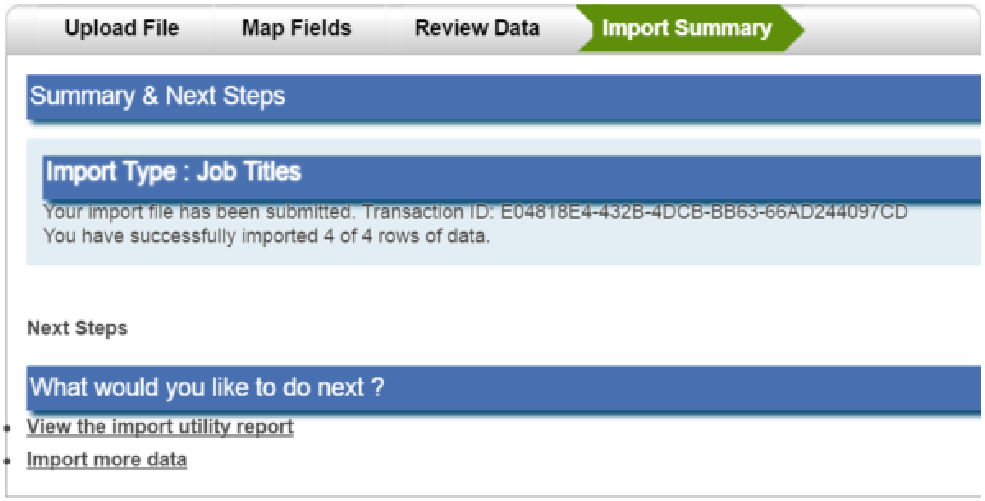
12. Place a check mark in the box next to the **Is Valid** field to verify the accuracy of the data to be imported.



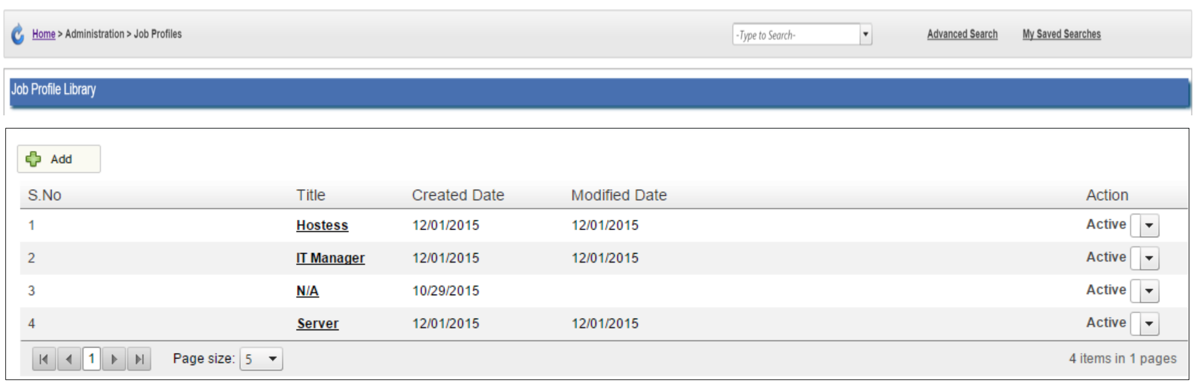
13. Click **Import the Data** under **Complete the Import** once the data has been verified and is correct.



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

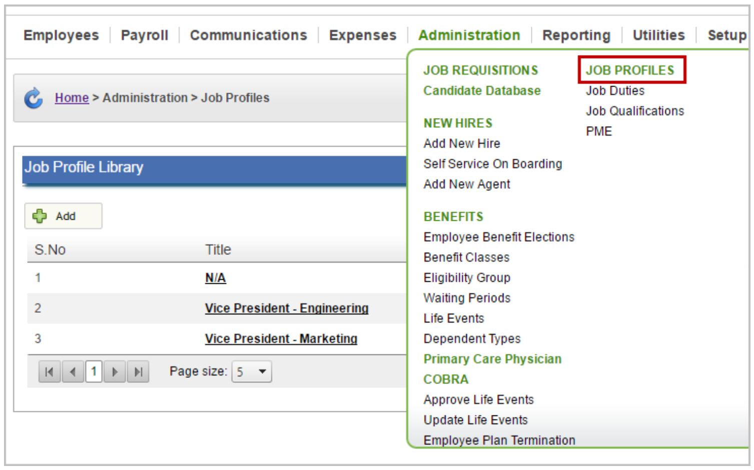


15. The Job Titles now reside in Advanced HR and will be listed in **Administration – Job Profiles**. Please reference how to associate an employee with a Job Title in the *Assigning an Employee a Job Title* section of this document.

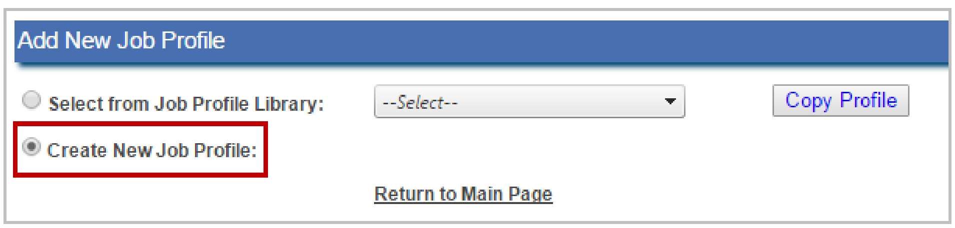


Manually adding a Job Title

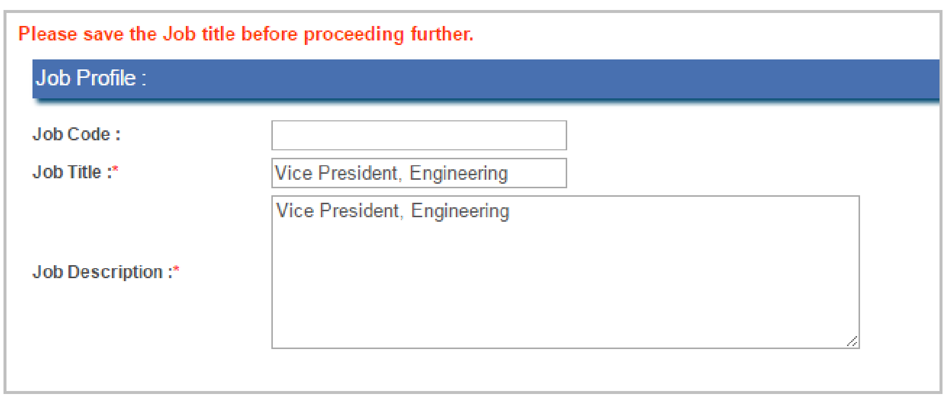
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to **Administration – Job Profiles**.



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

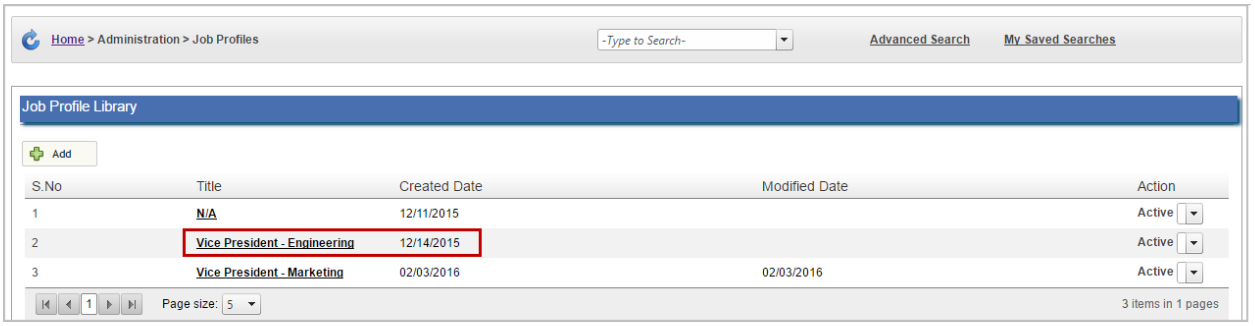


4. Enter **Job Title** (required) and **Job Description** (required).



5. Click **Save**.

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



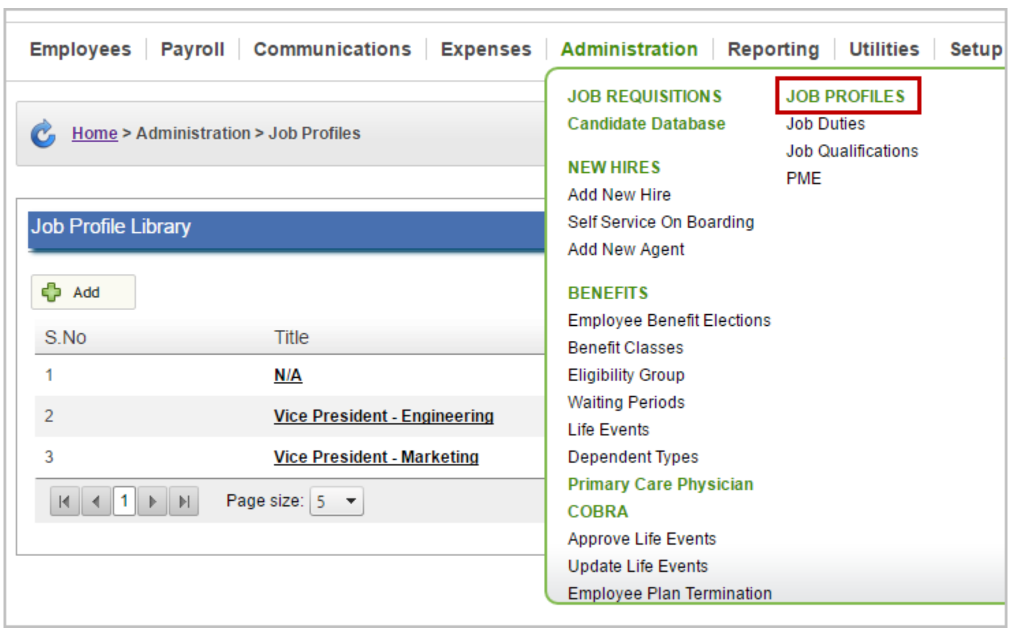
Editing Job Titles

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

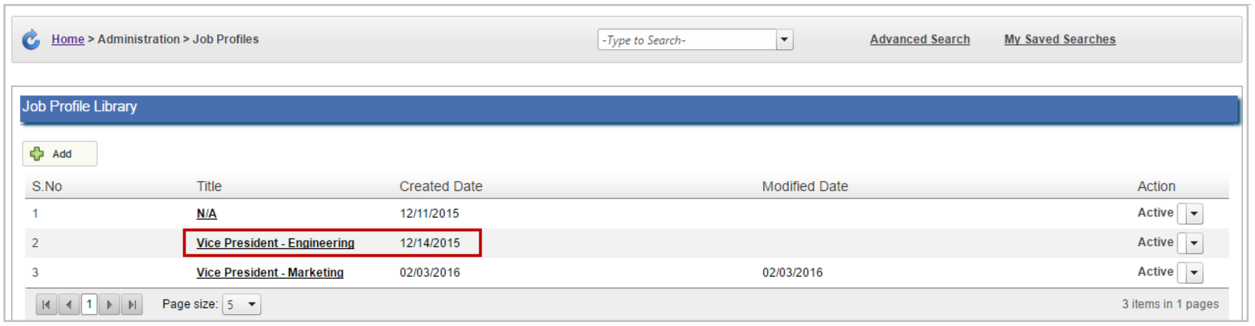
In the example below, the Director of Human Resources has made the decision to change the Job title of Vice President, Engineering to Vice President of Engineering. The Director of Human Resources has also come up with a brief description to highlight the responsibilities that accompany the Job Title.

To edit a Job Title:

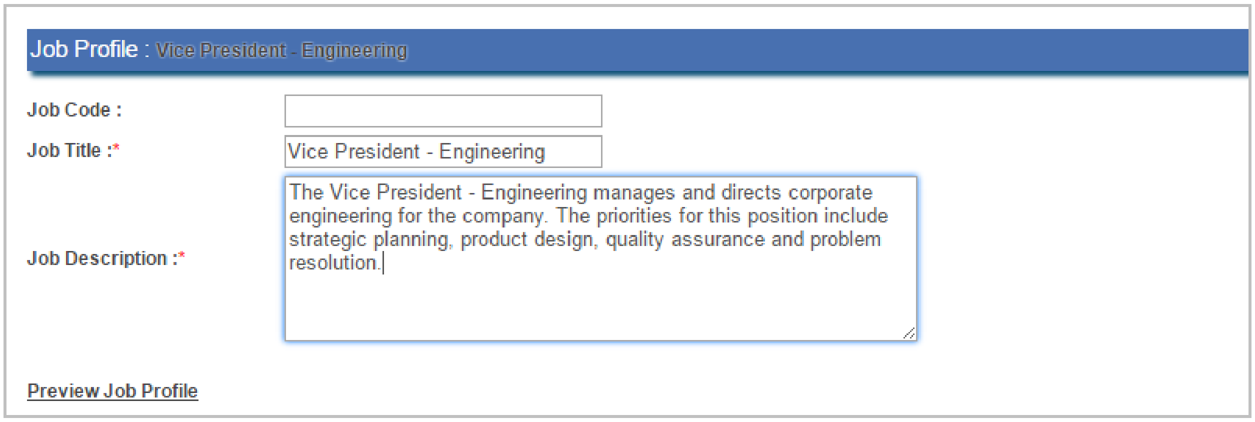
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to **Administration – Job Profiles**.



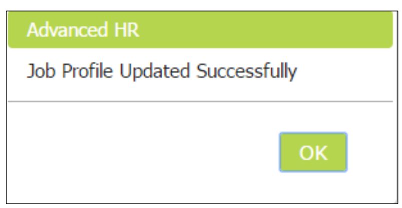
3. Click on the hyperlink of the Job Title you want to edit.



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



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

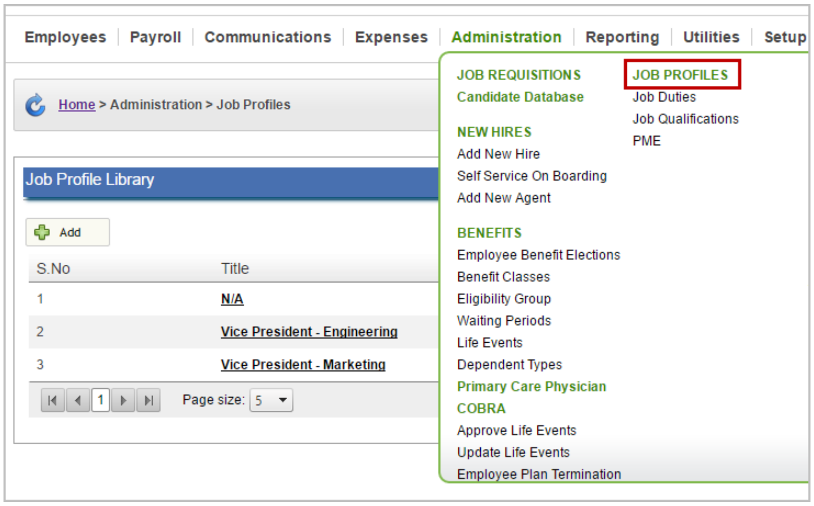


Inactivating Job Titles

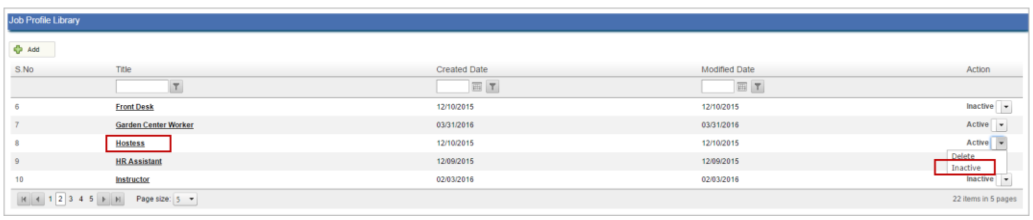
Some jobs may be seasonal and thus only be applicable during specific months for example or due to budget constraints, a job may be cut indefinitely. Users can inactivate a Job Title in Advanced HR to accommodate these circumstances. Inactivating a Job Title retains the associated Job Title and description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

To inactivate a Job Title:

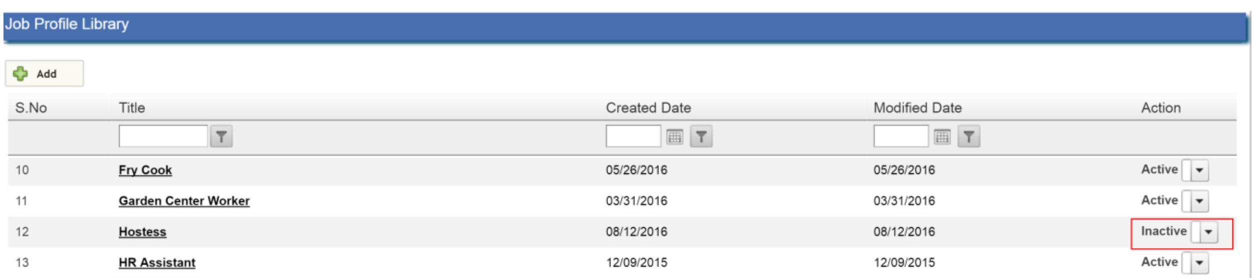
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to **Administration – Job Profiles**.

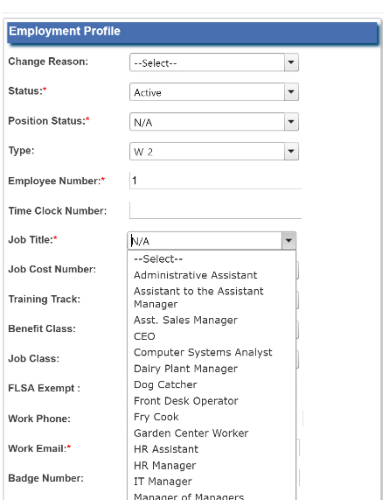


3. Locate the Job Title you would like to inactivate and select **Inactive** under the column with the **Action** heading.



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





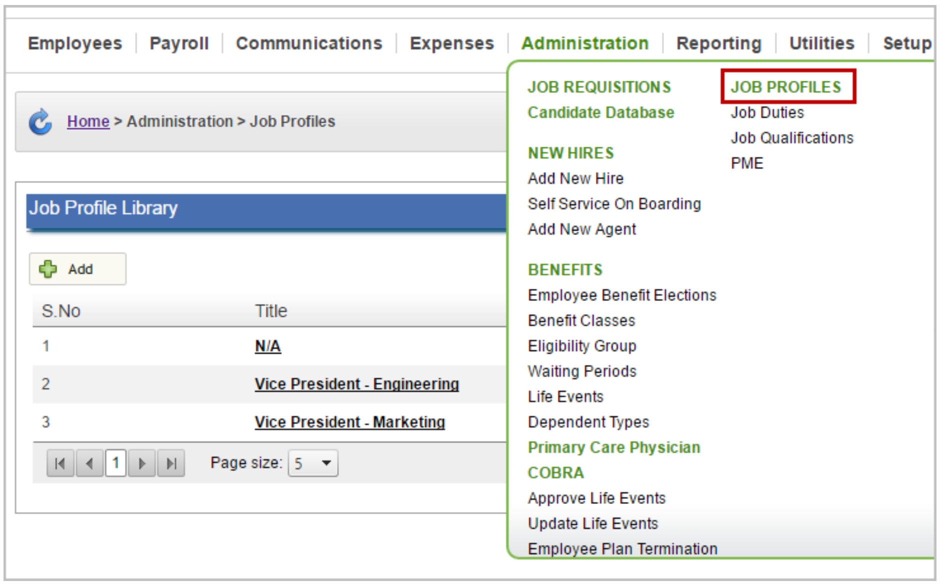
The Job Title will no longer be available to assign to employees going forward, as it is removed from the **Job Title** drop-down list available in the **Employees – Employment** screen. Employees already assigned the Job Title will retain the Job Title in Advanced HR.

Deleting Job Titles

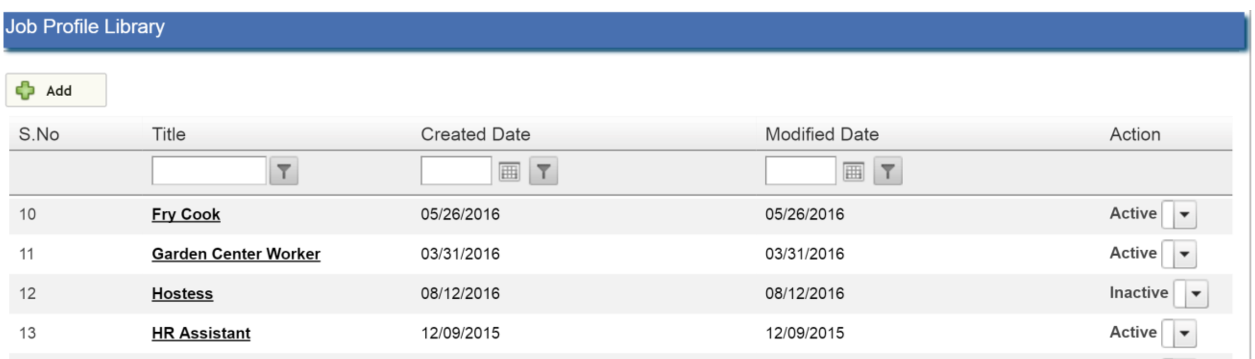
As responsibilities transform and jobs change, sometimes job titles need to be eliminated. Advanced HR allows you to delete Job Titles when they are no longer required.

To delete a Job Title:

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



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



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

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

Employee List

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

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

Employee List

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

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

Employment Profile

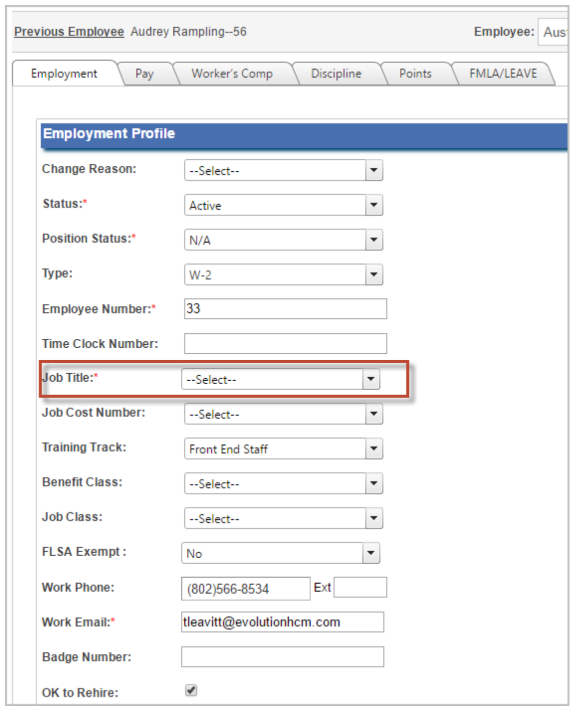
- **Change Reason:** --Select--
- **Status:*** Active
- **Position Status:*** N/A
- **Type:** W-2
- **Employee Number:*** 36
- **Time Clock Number:**
- **Job Title:*** *--Select--*
- **Job Cost Number:** --Select--
- **Training Track:** --Select--

Assigning Employee Job Titles

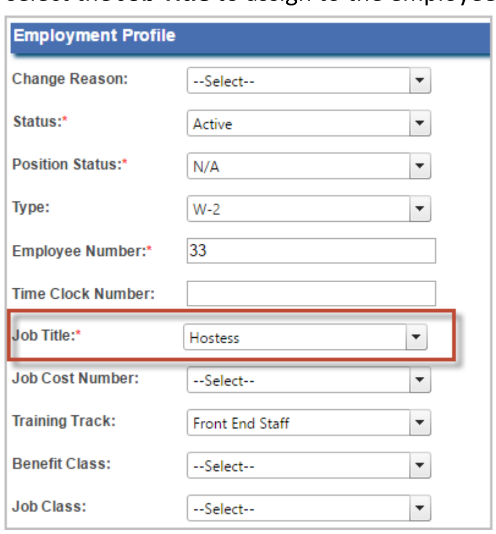
Once you have populated the Job Library with Job Titles either manually or utilizing the Import utility, you are now able to assign a Job Title to an employee.

To assign a Job Title to an employee:

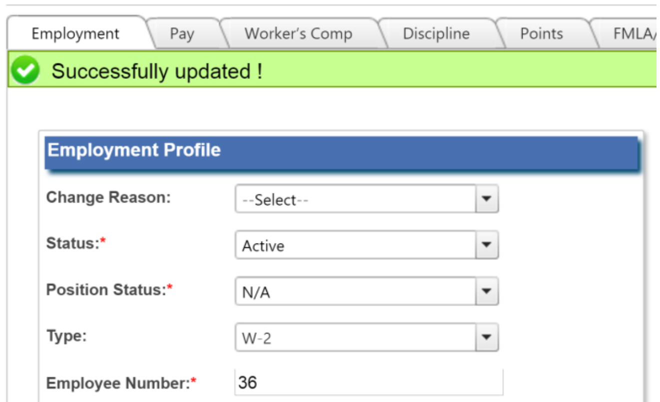
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to the **Employees – Employment** tab and search for the employee to whom the Job Title will be assigned.



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



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

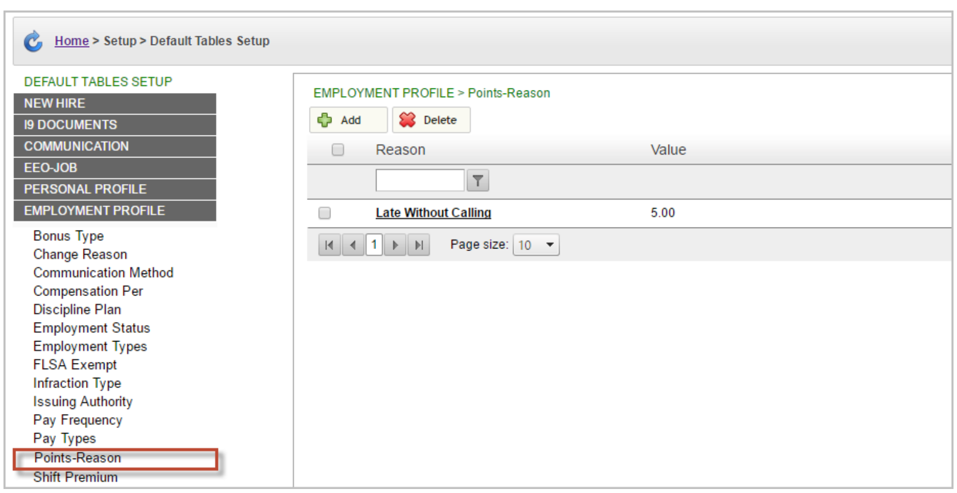


Adding reasons for points

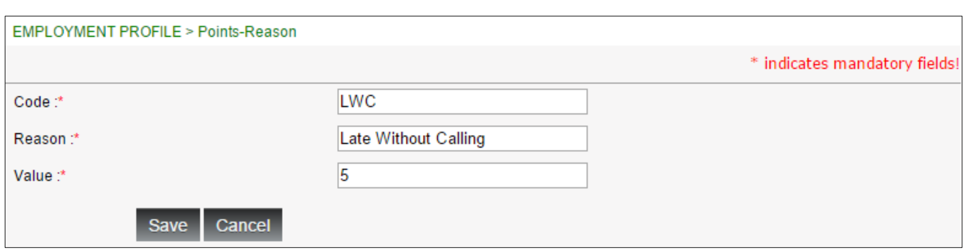
If the organization uses a point system, such as points for tardiness or missed work time, points by infraction can be stored on this tab.

To add a Reason for Points:

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



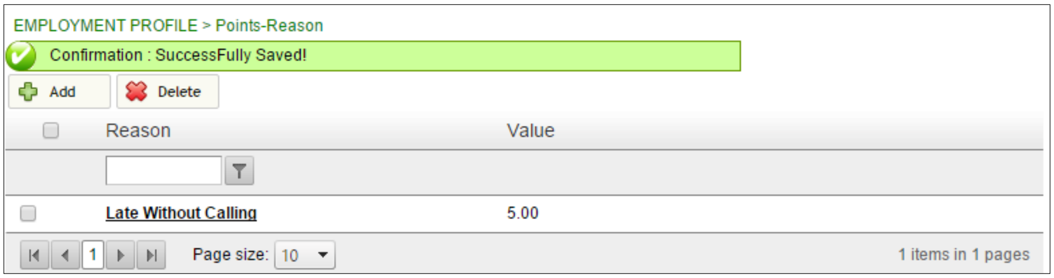
2. Click **Add**.
3. Enter information.



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

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

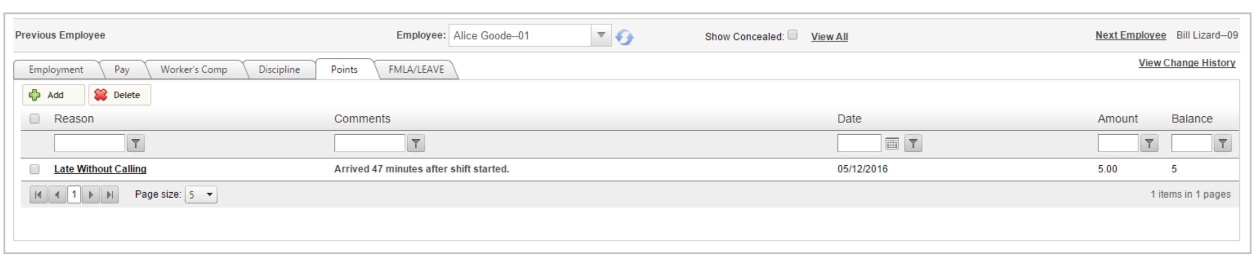
4. Click **Save**.



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

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

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



Chapter 4: Certifications & Licenses

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

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

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

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

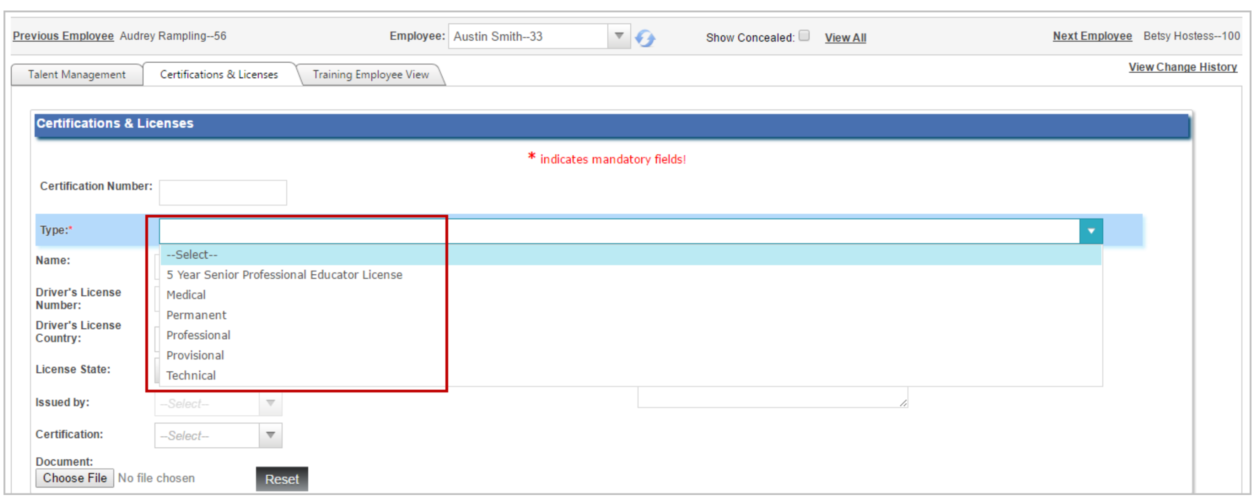
Note: Default Table Setup is required to populate fields utilized in the Certifications and Licenses Employee Employment Record.   The field information is detailed below.

Certifications & Licenses Type

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

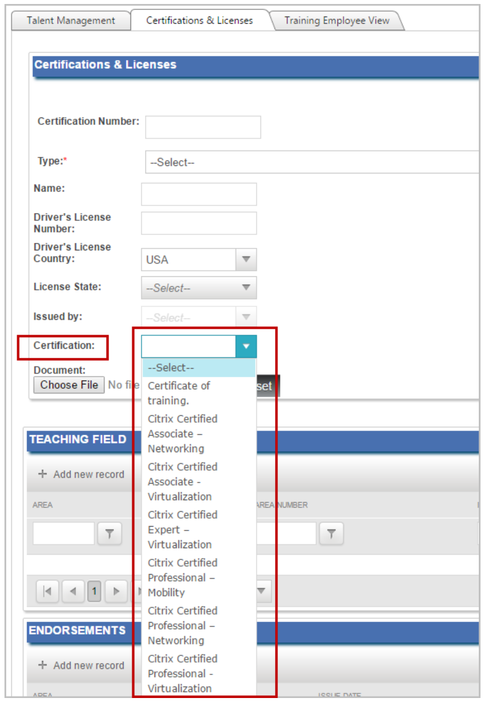
- Medical
- Permanent
- Professional
- Provisional
- Technical

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



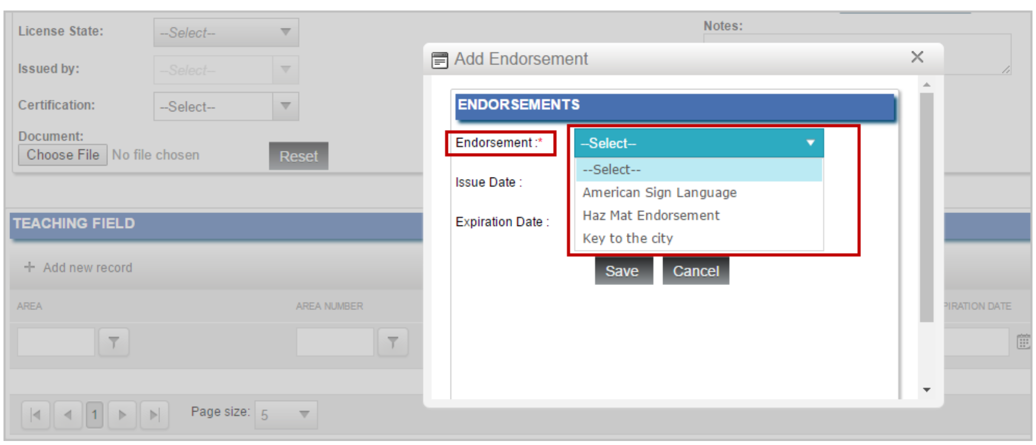
C&L Certifications

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



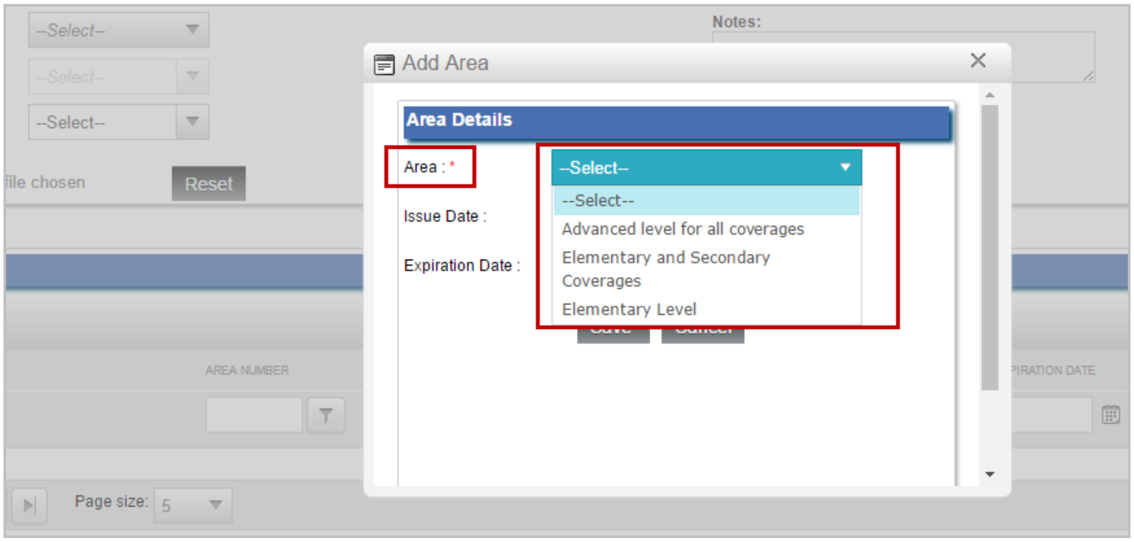
C&L Endorsements

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



C&L Areas

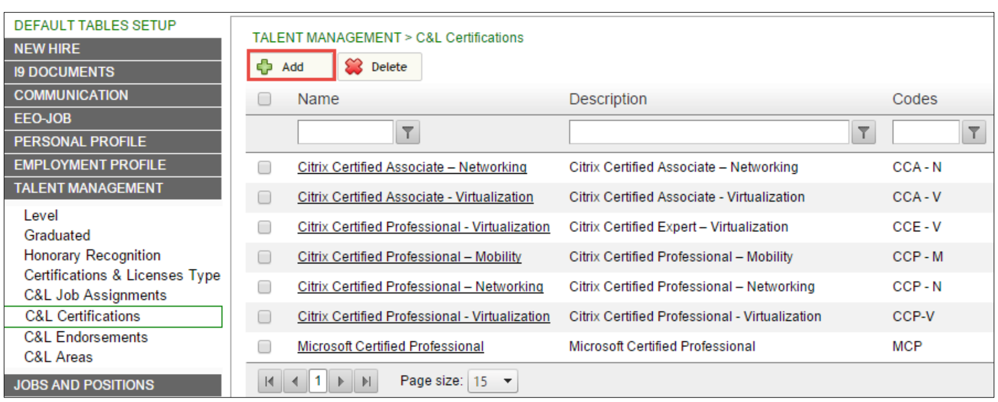
The C&L Areas table has no default values. It displays on the **Employee - Talent Management - Certifications & Licenses - Teaching Fields - Add Area** drop-down.



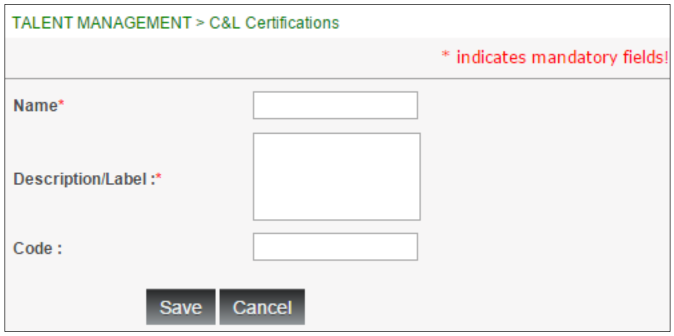
Adding Talent Management default values

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

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



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



6. Click **Save**.

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

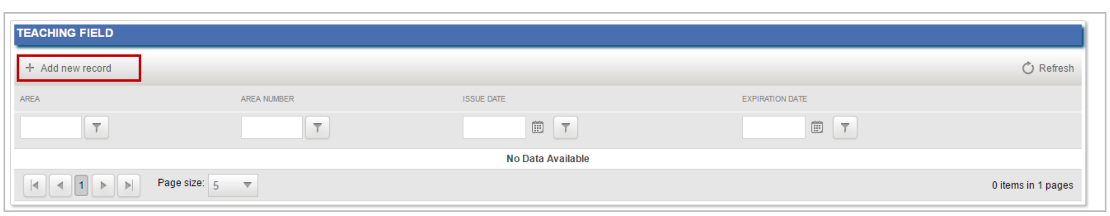
Adding Certifications & Licenses to an employee record

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

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

Adding Teaching Fields to an employee record

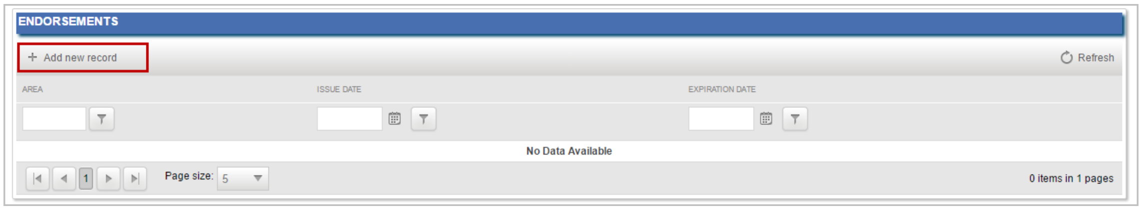
1. Go to **Employees – Talent Management** Certifications and Licenses tab.
2. Once your employee is in context, click **Add**.
3. Under the Teaching Field, click on Add new record.



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

Adding Endorsements to an employee record

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



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

Chapter 5: Training Administration

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

Training class terminology

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

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

Training Class setup

Adding a new class

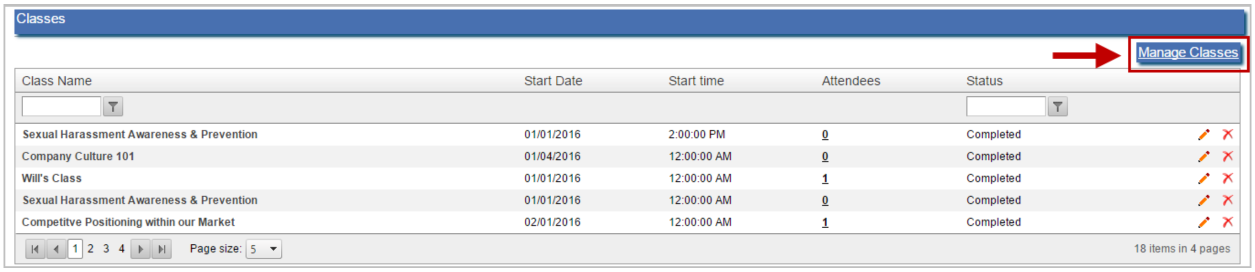
Classes are the courses you create in Advanced HR. Class schedules are listed for each class.

Note: You cannot manage classes from the scheduler area.

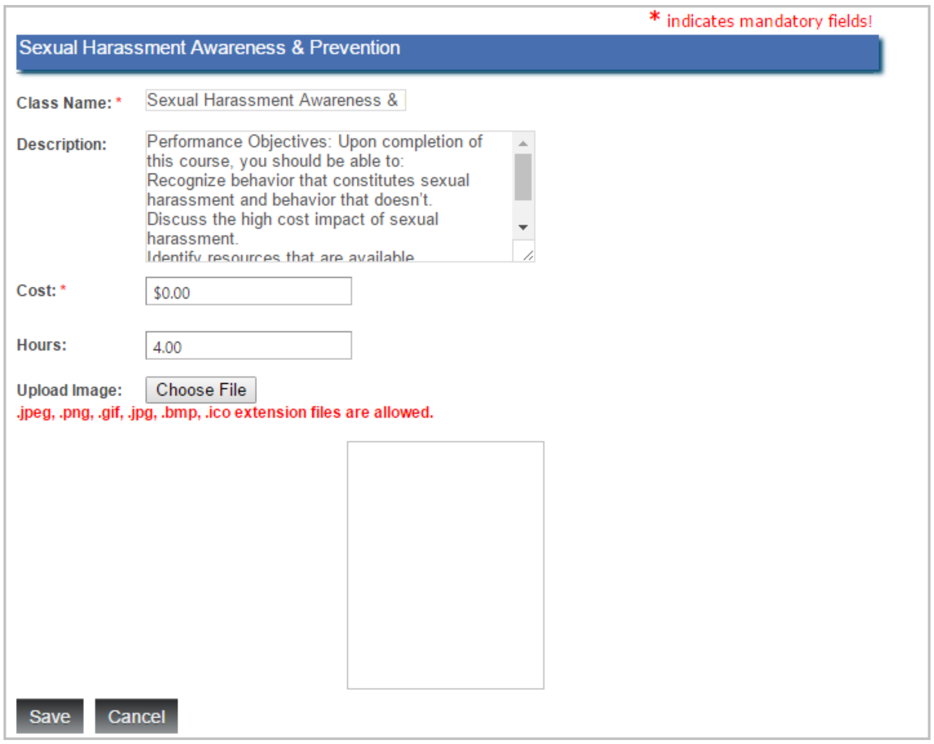
To add a new class:

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

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



4. Click **Add**.
5. Enter Class information:



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

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

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

Note: You cannot manage classes from the scheduler area.

Editing existing classes

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

Deleting classes

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

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

Managing class schedules

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

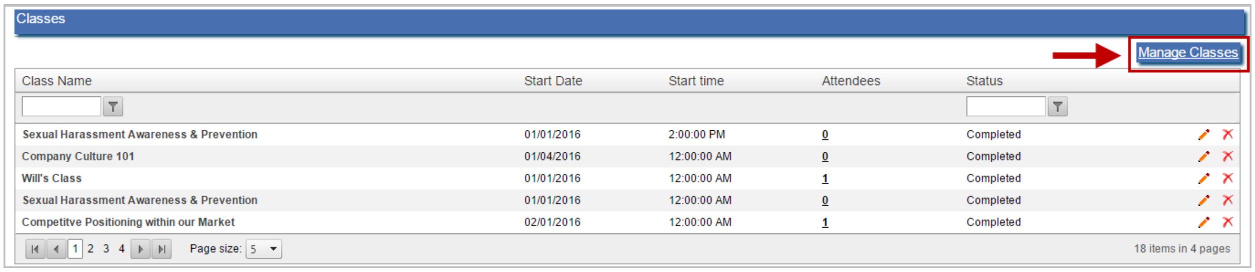
It is important to understand how Class Enrollment Periods are utilized in Advanced HR. Enrollment periods determine class schedules. You can group class schedules into defined class enrollment periods for each type of class you offer. Grouping class schedules by enrollment date provide a way to add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

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

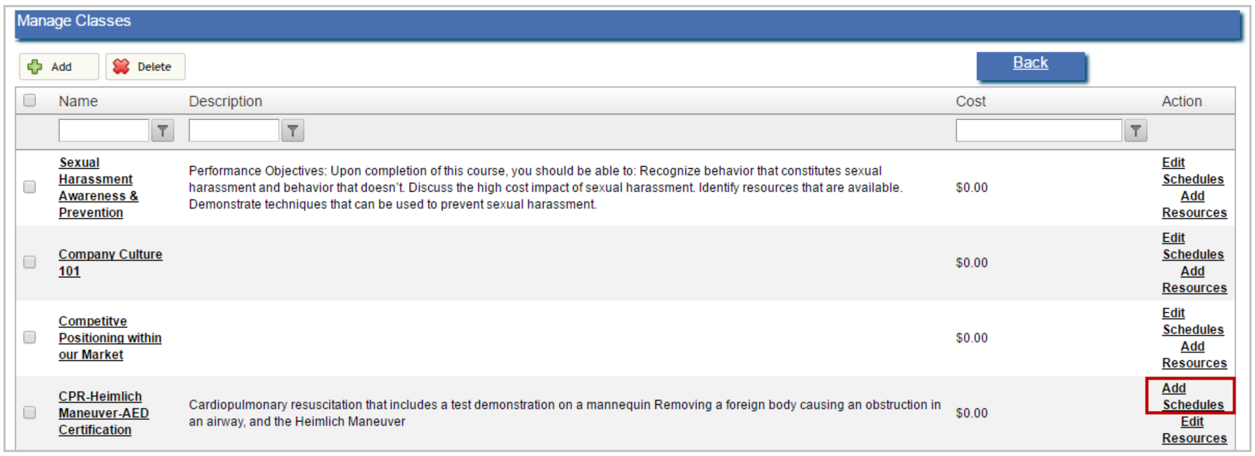
To manage class schedules:

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

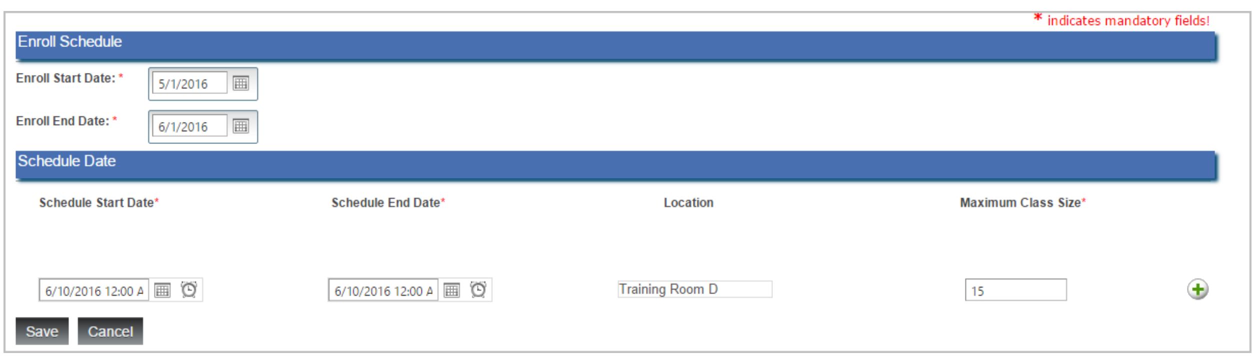
3. Click on **Manage Classes** to navigate to the class management section of the setup.



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



5. Click **Add**.
6. Enter the following information for the schedule:



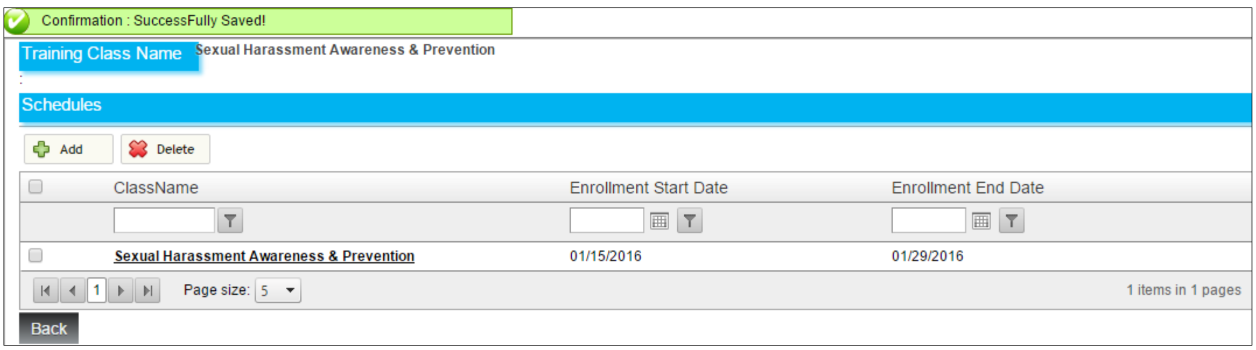
Field	Definition
Enroll Start Date and Enroll End Date	The starting and ending date for the enrollment period for this class schedule (required).
Schedule Start Date and End Date	The starting and ending date for the enrollment period for this class schedule (required). You can add both a date and time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

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

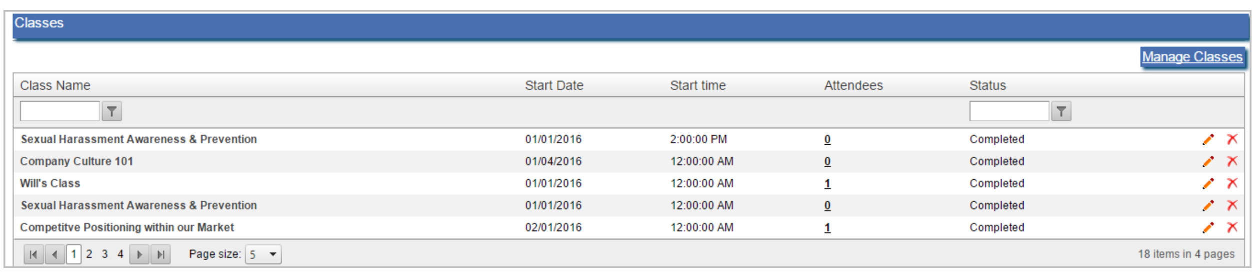
Employees will only be able to enroll for the class during this timeframe.

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

You will receive confirmation that your schedule was saved successfully.

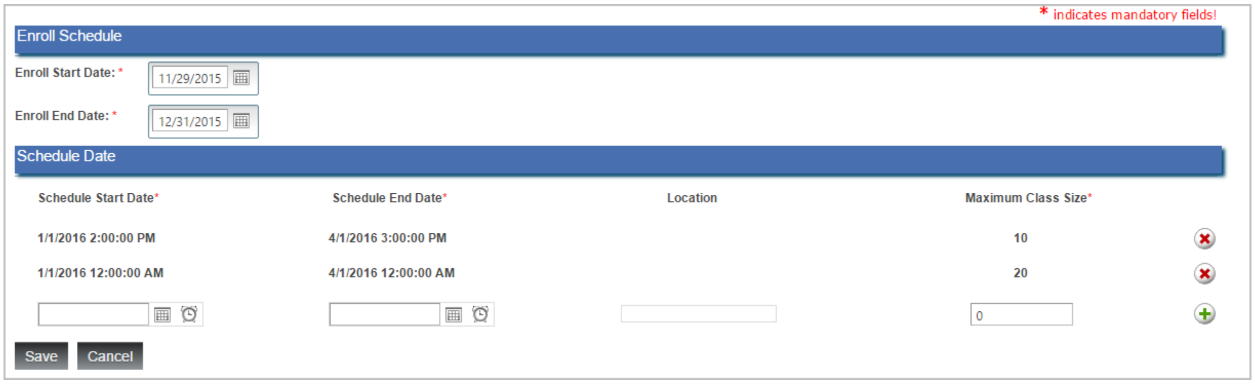


The class can now be viewed by navigating to **Administration – Classes** and will display the Start Date, Start Time, Attendees enrolled, and the status of enrollment.



Adding additional schedules using the same enrollment period

You can add additional schedules using the same enrollment period by going back to the class hyperlink within **Manage Classes**. Click the button to add this schedule and enter another within the same dialogue box. Click the **Save** button when all schedules for this enrollment period have been entered.



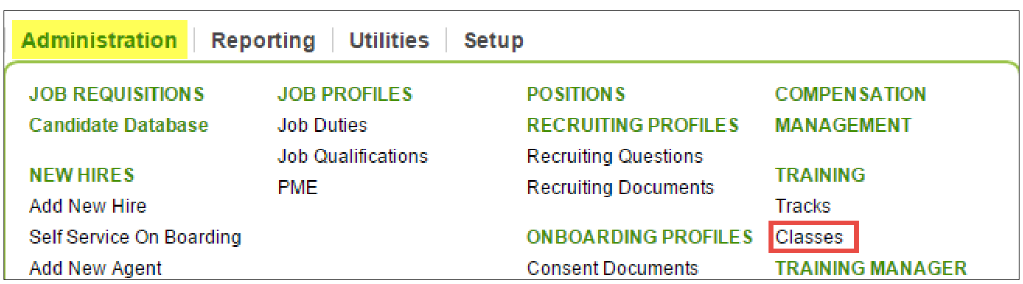
To edit schedules for a class, click the Edit Schedules hyperlink .
To delete a class schedule, select the check box to the left of the class name, and click the **Delete** button.

Adding class resources

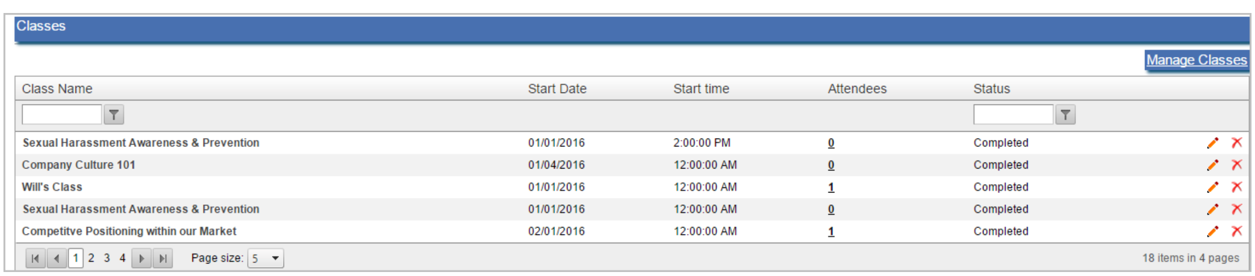
Once a class is created, you can use the **Add Resources** hyperlink to add web links and documents for the class. Documents may include a syllabus for the class, testing materials for self-study and/or a link to the Go To Training where the class will be hosted.

To add a Class Resource:

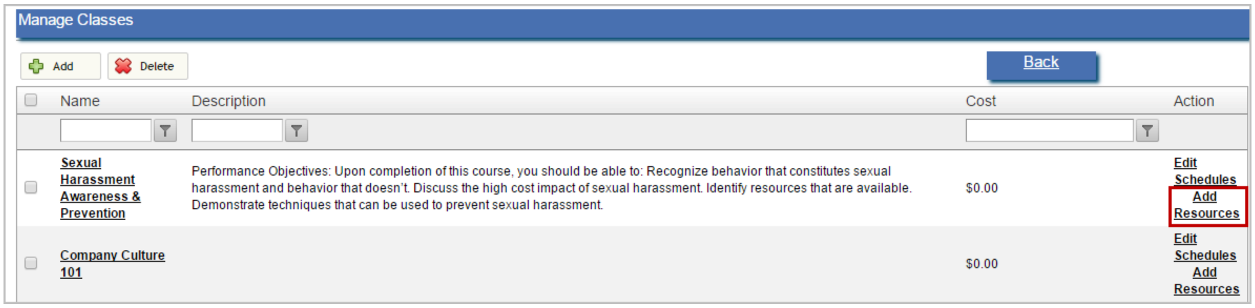
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to **Administration – Training – Classes**.



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



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



5. Enter the Resource information:

- To attach documents to the class:
  Click the **Select** button to browse and attach a file.
  Use the File Upload dialogue box to locate and select a file.
  Click **Open** to attach the file to the class.
  To add additional Attachments, click the button.
- To attach URL, or website links, to the class:
  Type in the website link in the "URL" field.
  Note: Enter the full website link, including http://, in the field provided.
  To add additional web links, click the button to the right of the URL field.

6. Click **Save**.

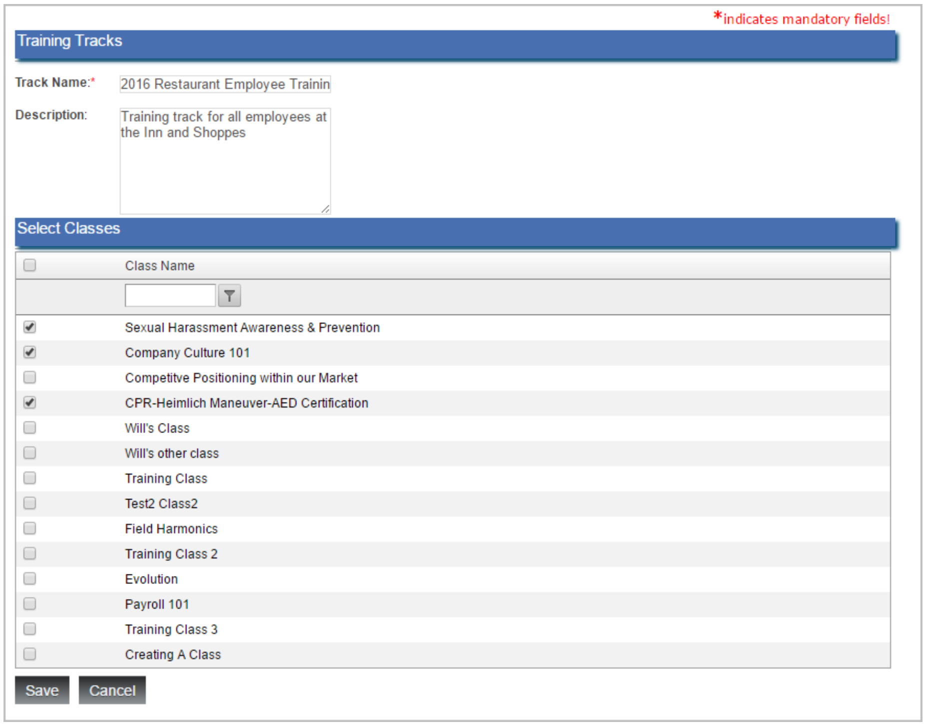
Creating Employee Training Tracks

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

To create a Training Track:

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

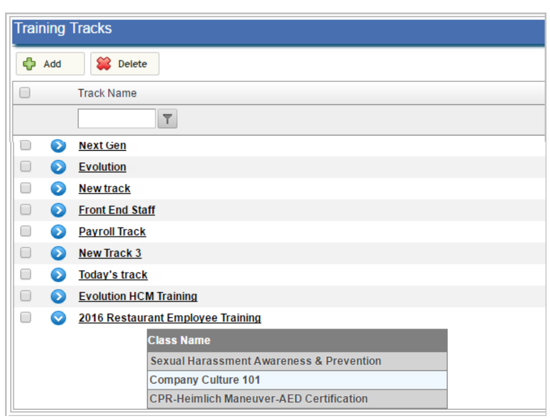
3. Click on **Add**.
4. Enter the following information:



- **Track Name**: The name of the training track (required).
- **Description**: A more descriptive name for the training track.

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

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



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

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

Important Notes about Training Tracks:

- Training Tracks can be assigned to employees individually if Position Management is disabled. Visit the Employment screen for each employee to select a Training Track.

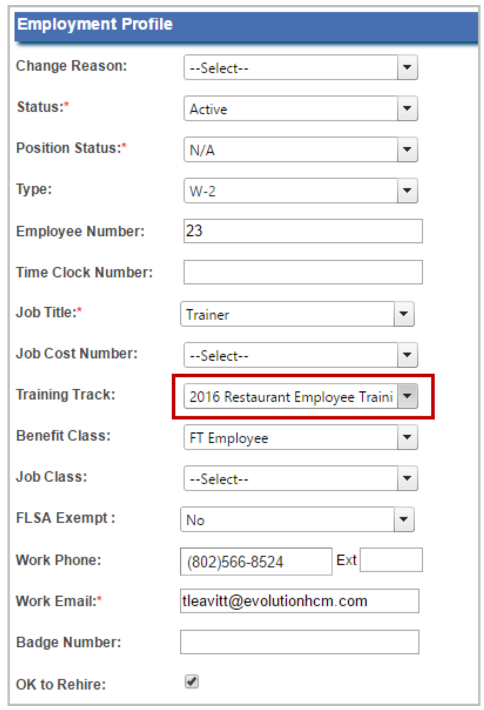
- If Position Management is enabled, Training Tracks must be assigned by position. All employees in that position are assigned the track by default.

- Add additional classes for employees to existing Training Tracks assigned to Employees or Positions. If an employee is assigned to a new Training Track, the classes of the new track become available and the employee progress is mapped on the newly assigned track, progress on the previous track is no longer recorded in the system.

Associating a Training Track to an employee

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

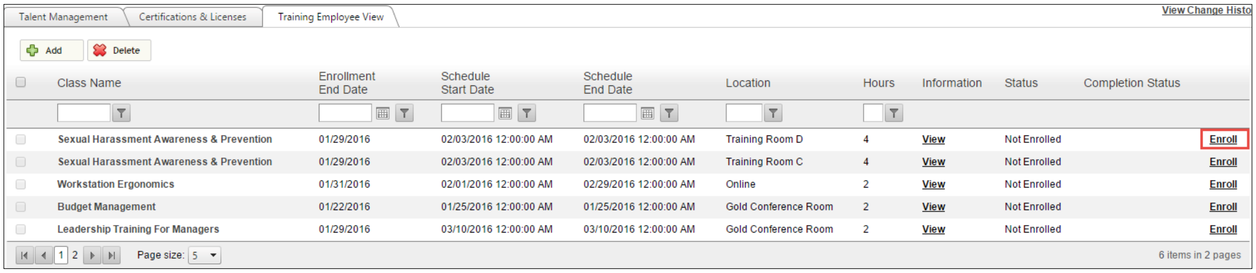
1. Navigate to your Advanced HR site and log in as the Administrator.
2. Go to the **Employees – Employment** screen and click on the **Employment Profile** tab.
3. Once your employee is in context, select the Training Track to which your employee will be associated from the **Training Track** drop-down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



Enrolling an employee in a training class

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

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



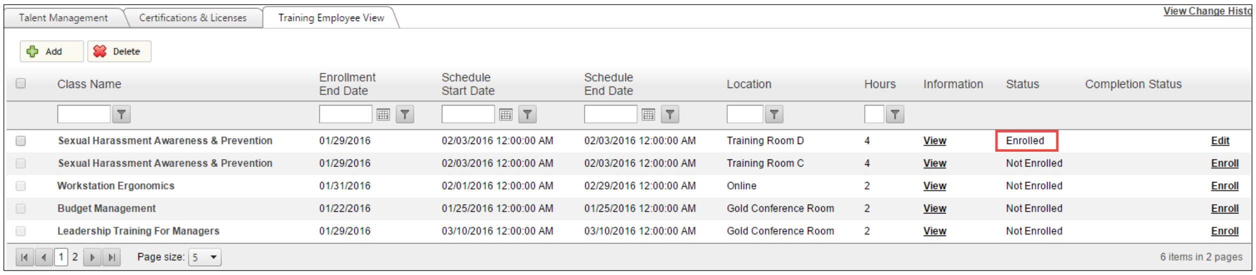
Talent Management | Certifications & Licenses | Training Employee View — View Change Histo

Add | Delete

Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Not Enrolled		Enroll
Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
Budget Management	01/22/2016	01/25/2016 12:00:00 AM	01/25/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll

1 2 Page size: 5 — 6 items in 2 pages

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



Talent Management | Certifications & Licenses | Training Employee View — View Change Histo

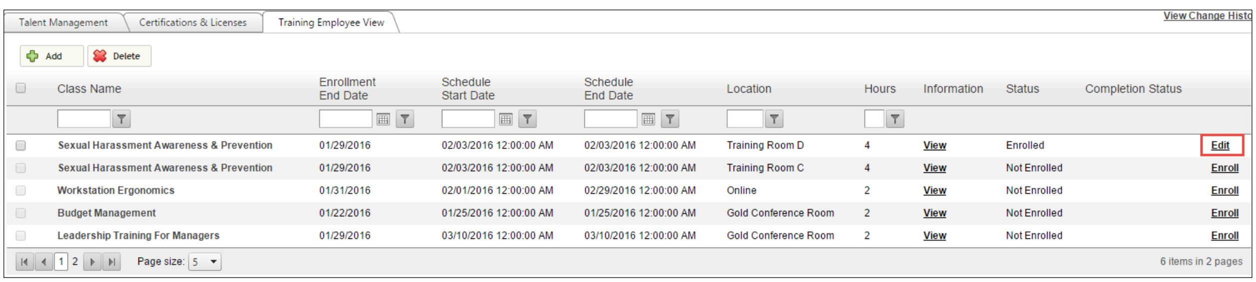
Add | Delete

Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Enrolled		Edit
Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
Budget Management	01/22/2016	01/25/2016 12:00:00 AM	01/25/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll

1 2 Page size: 5 — 6 items in 2 pages

Updating employee completion of a training class

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



Talent Management | Certifications & Licenses | Training Employee View — View Change Histo

Add | Delete

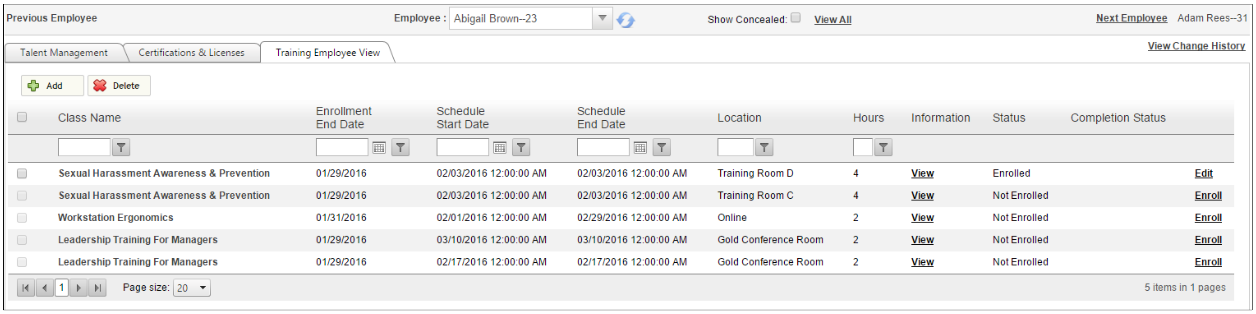
Class Name	Enrollment End Date	Schedule Start Date	Schedule End Date	Location	Hours	Information	Status	Completion Status	
Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room D	4	View	Enrolled		Edit
Sexual Harassment Awareness & Prevention	01/29/2016	02/03/2016 12:00:00 AM	02/03/2016 12:00:00 AM	Training Room C	4	View	Not Enrolled		Enroll
Workstation Ergonomics	01/31/2016	02/01/2016 12:00:00 AM	02/29/2016 12:00:00 AM	Online	2	View	Not Enrolled		Enroll
Budget Management	01/22/2016	01/25/2016 12:00:00 AM	01/25/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll
Leadership Training For Managers	01/29/2016	03/10/2016 12:00:00 AM	03/10/2016 12:00:00 AM	Gold Conference Room	2	View	Not Enrolled		Enroll

1 2 Page size: 5 — 6 items in 2 pages

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

View employee training

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

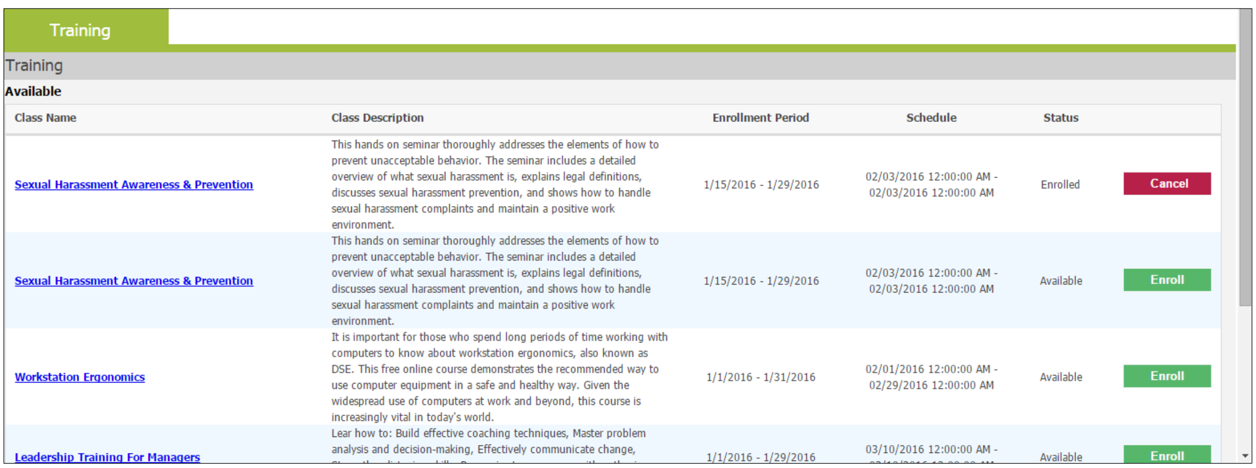


Employees can be enrolled into a class by any user that has access to this screen.

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

Training View in the Portal

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



Chapter 6: Company Documents

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

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

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

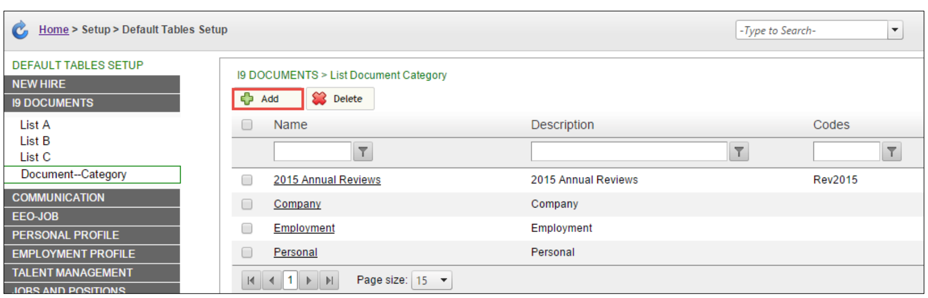
The following document categories are supplied by default in Advanced HR:

- Company
- Employment
- Personal

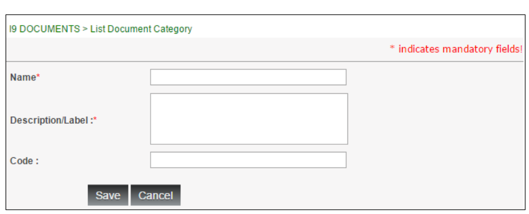
Adding a Company Document Category

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

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



3. Enter the Document Category information.

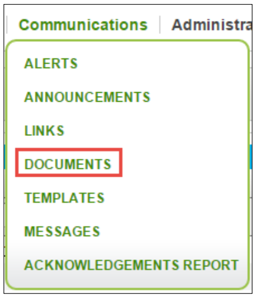


- **Name**: Enter document category name (required).
- **Description/Label:** Enter text describing the Document Category (required).

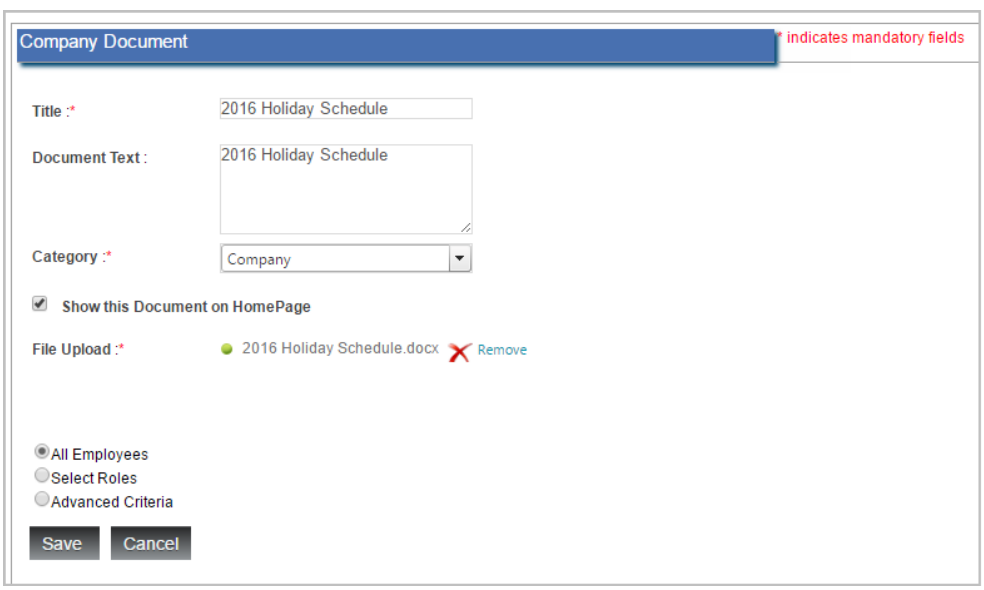
- **Code:** Assign a code to the document category.

4. Click **Save**.

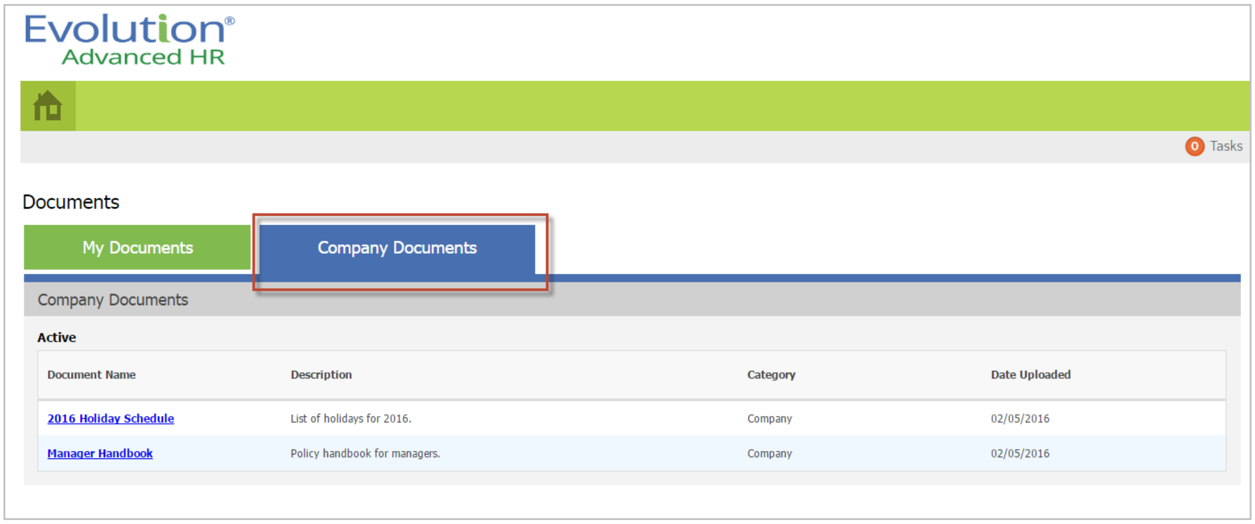
Adding Company Documents



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

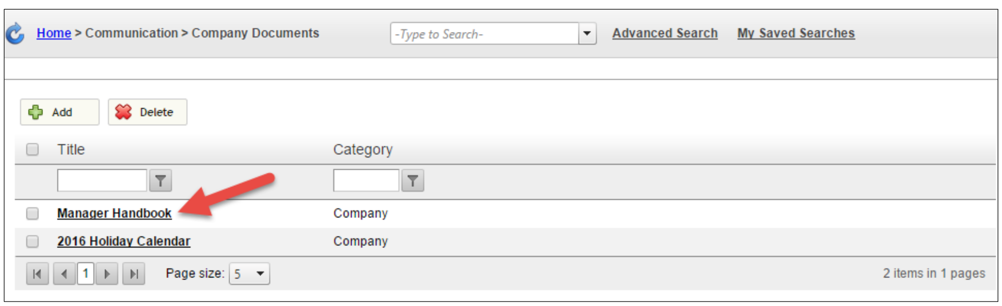


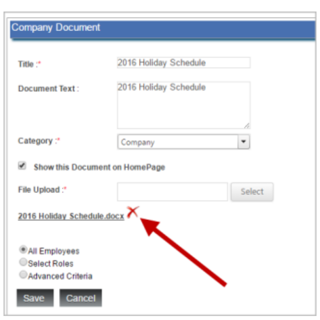
The following is an example of how company documents appear to the employee on the Employee Portal – **Documents** – **Company Documents** tab.



Editing Company Documents

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





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

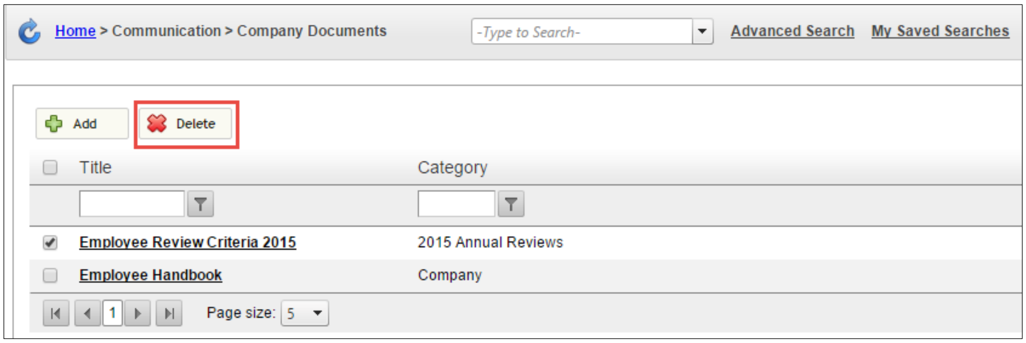
- Navigate to the document using the File Upload dialog box.
- Click on the document and select **Open**.

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

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

Deleting Company Documents

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



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

Chapter 7: Communication and Alerts

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

Templates

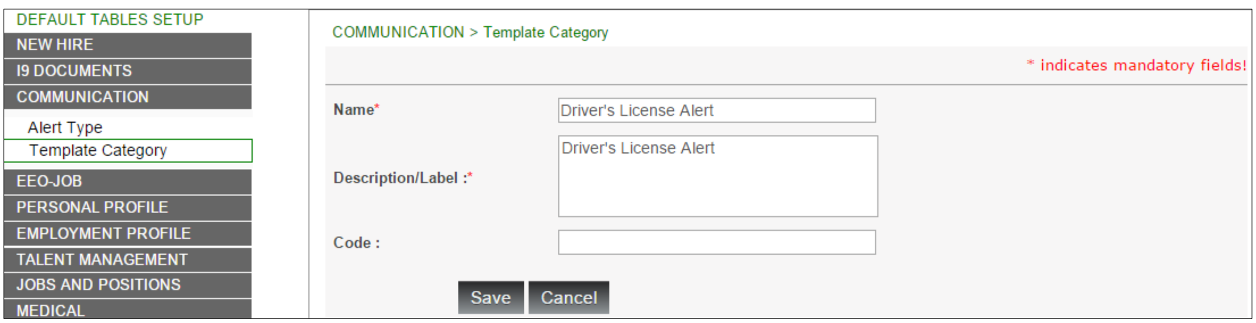
Templates are used to create the Word merge-like documents for use in email communications. Templates take information (fields) from the system and combine it with HTML formatted email text. An example of a template could be an offer letter for a job candidate or it could be an alert for a driver's license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

Creating a Template Category

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

To create categories for company templates:

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

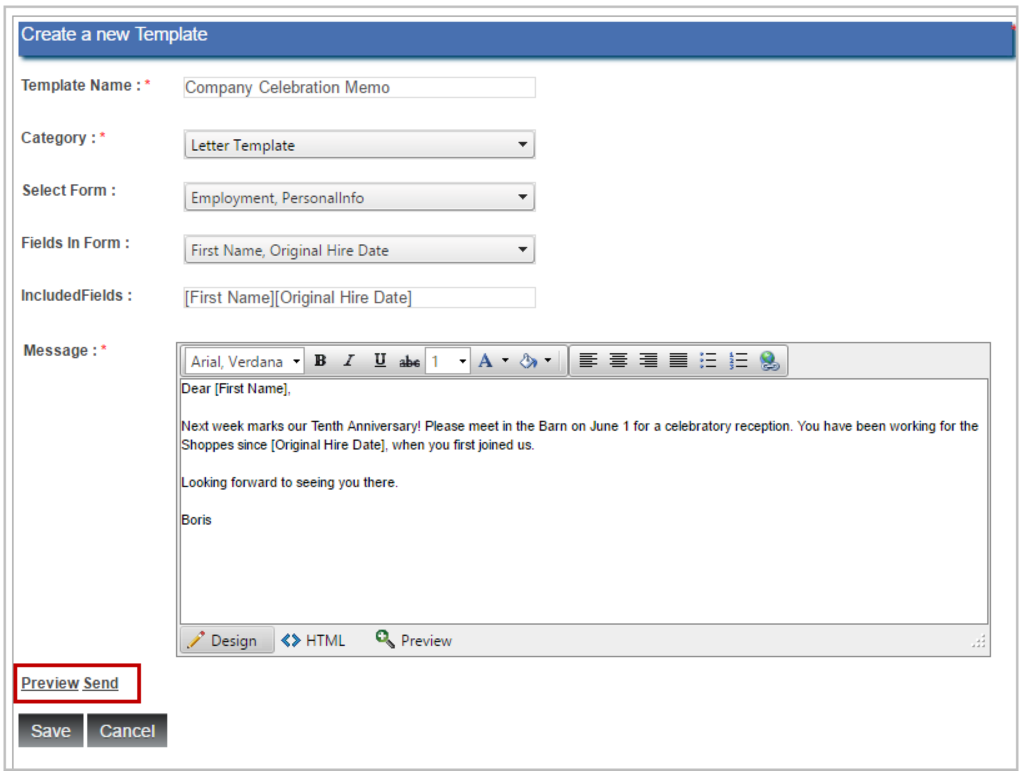


Using templates

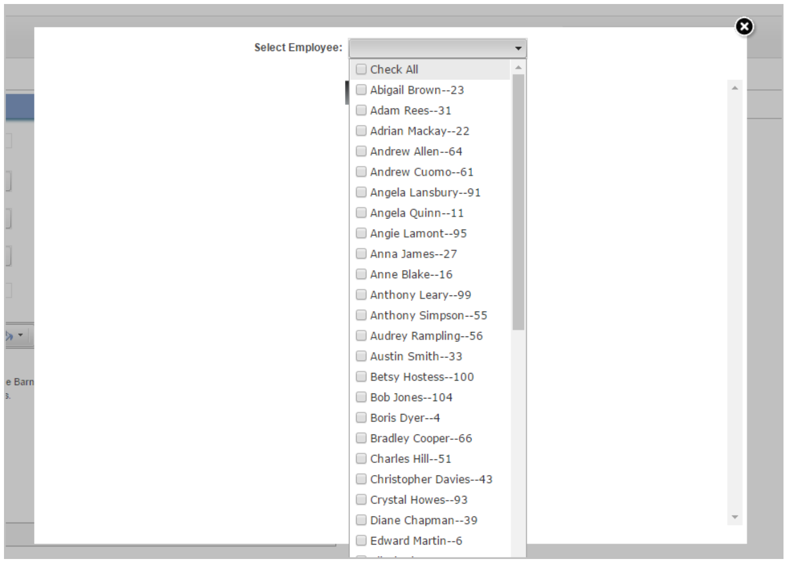
1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication - Templates**.
2. Click **Add**. The following Template categories are supplied by default:
   - **Candidate Template** (used for onboarding).
   - **Letter Template** (used for communications).
3.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

- Emergency Contact
- Employee Certification
- Employee Position
- Employment
- Pay
- Personal Info
- Taxes

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

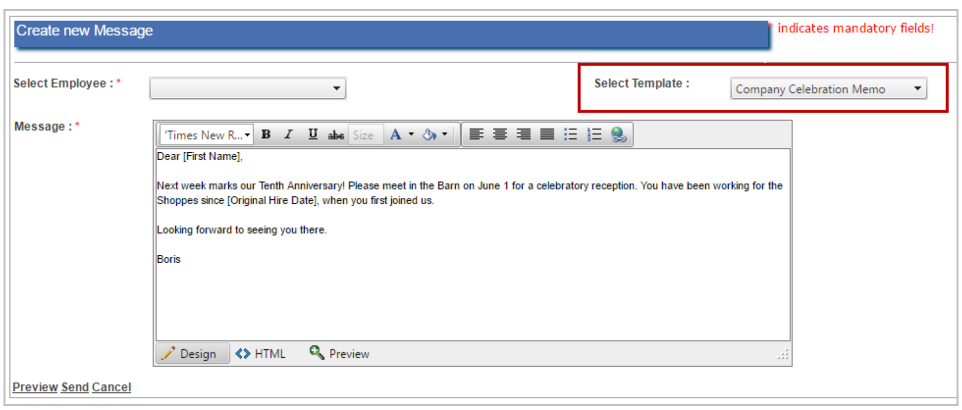


- Add any additional text needed in the **Message** section surrounding the fields you have selected where appropriate for this message.
- You can preview your template by clicking on **Preview.**
- You have the option to send the newly created Template to employees on the fly by clicking on **Send.**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



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

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



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

Alerts

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

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

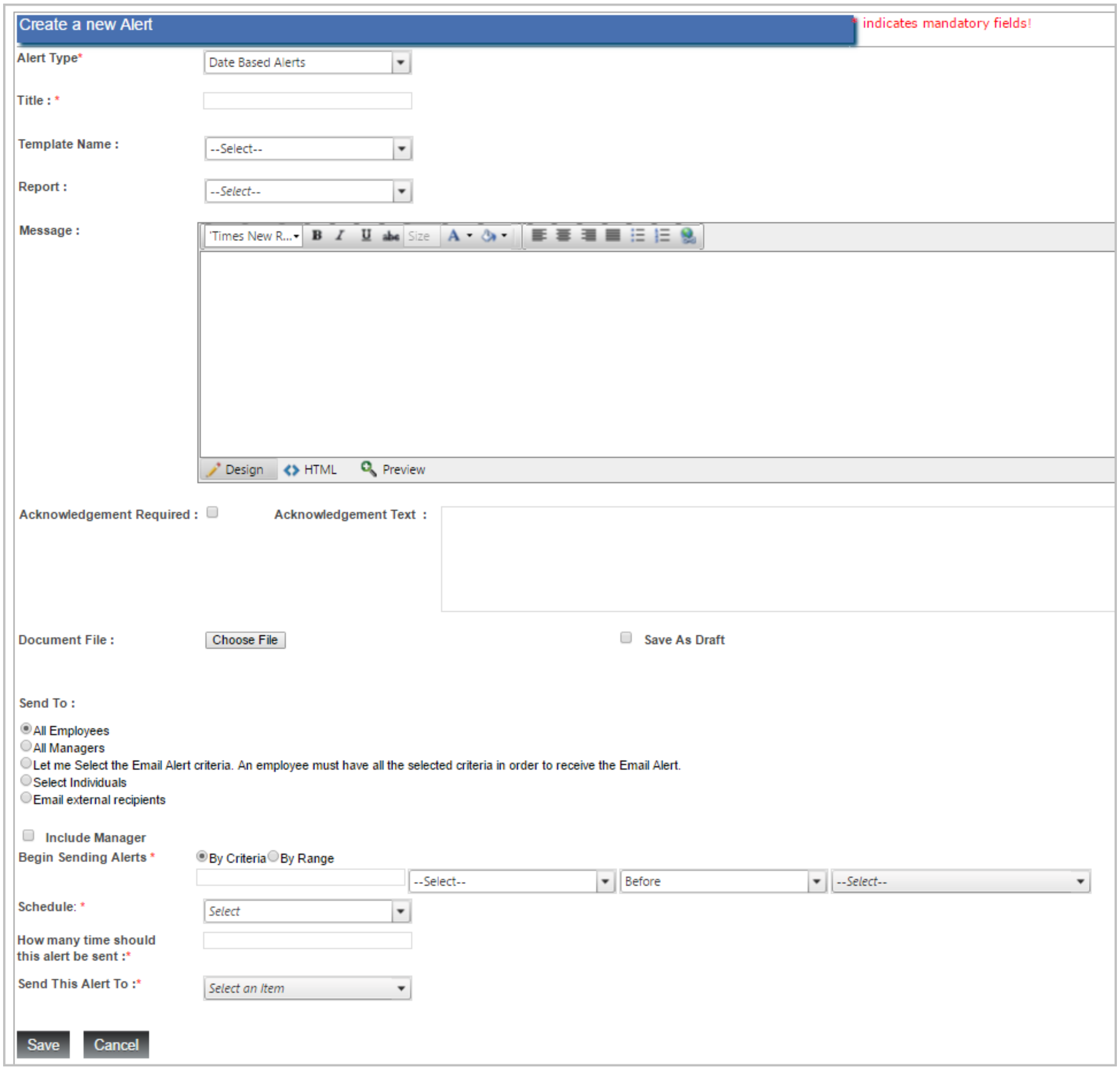
There are two types of alerts that you can create:

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

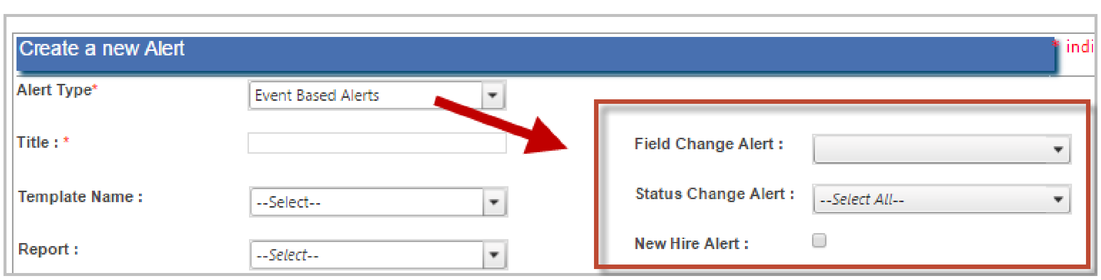
Creating a new alert

1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication** – **Alerts**.
2. Click **Add**.
3. Enter **Alert Type** (required). See above descriptions of the Alert Types.
4. For each type of alert, drop-down menus give the user the ability to refine the alert. Please see the appendix to see an example of an Event Based Alert.
5. Check the **Acknowledgement Required** box, to make employees acknowledge receipt of the alert.

   You may add acknowledgement text to state expectations or add additional information. This will require the employees to acknowledge receipt of the alert when logging into Advanced HR.
6. When the required fields are populated, including the alert message to be sent, click **Save**.



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



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

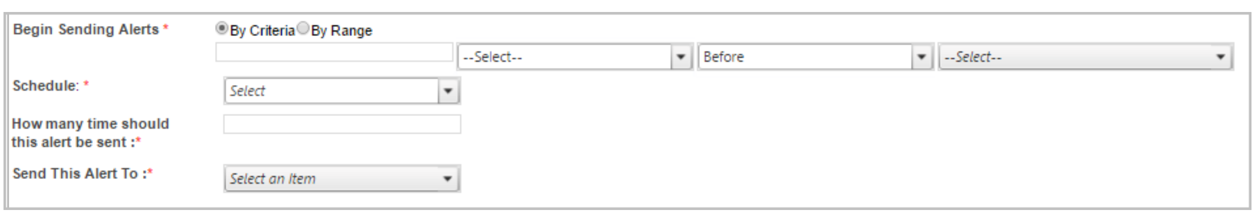
- If you want the event based alert to be based on a change in an employee's status, for example, an employee is going on Military Leave, then select a status in the **Status Change Alert** field.
- Select the **New Hire Alert** check box if this alert should go out to all managers, or all employees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

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

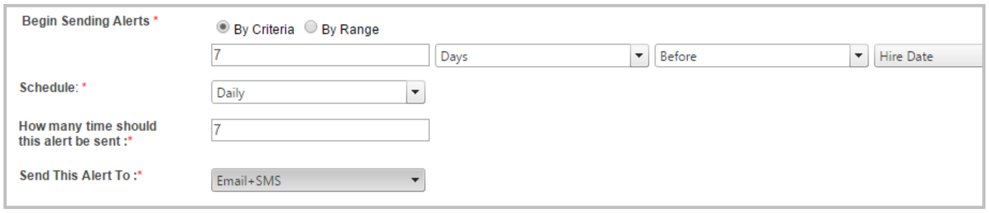
- You can include a document file in the alert by clicking the **Choose File** button and browsing to select a document.
- In the **Send To** section of the screen, you can choose among the following options for sending the alert:
  - All Employees
  - All Managers
  - Let me Select the Email Alert Criteria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

For Date Based Alerts

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



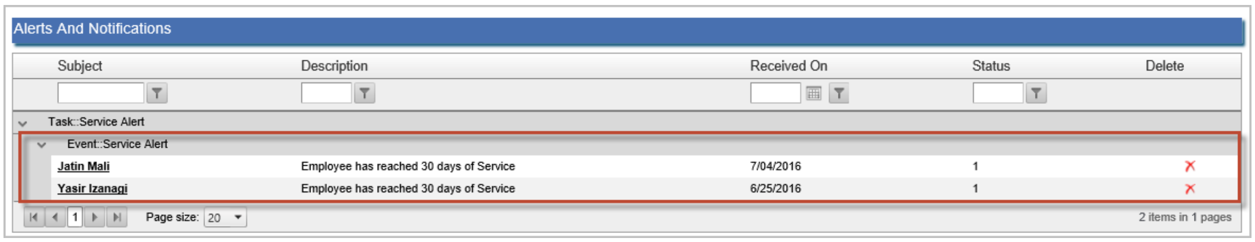
- You can **Begin Sending Alerts** – by **Criteria** or by a date **Range**. If you select **By Range**, the screen changes to display a **From Date** & **To Date** calendar fields.
- You select the **Schedule** such as a **One Time**, **Daily**, **Weekly**, **Monthly**, etc.
- Enter how many times to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



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

Example of an Alert

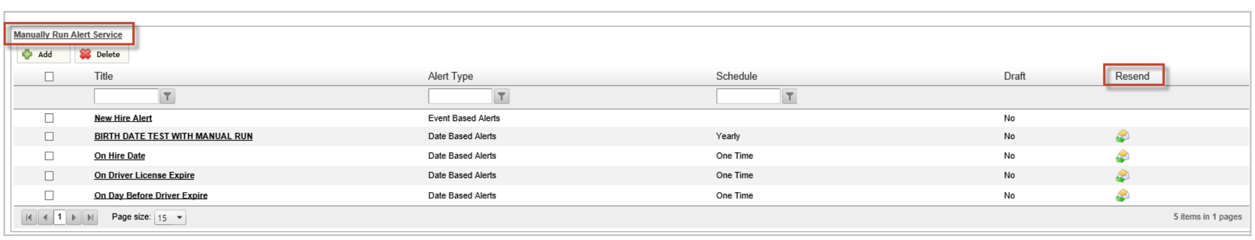
The following is an example of an event based alert (employee reaching 30 days of service) showing how it appears to the Send To receipient on their Home page, in the **Alerts and Notifications** section.



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

Manually running Alerts

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



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

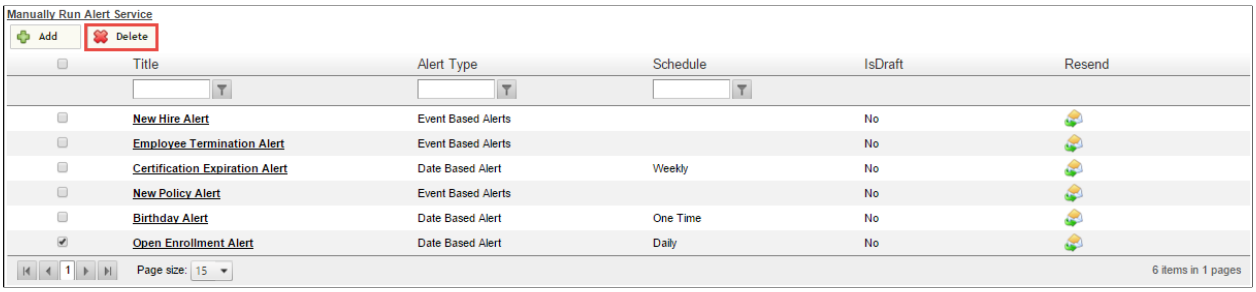
The system will run the alert as per the selected criteria, for example – an email alert to all employees that a new employee has joined the company.

Editing Alerts

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

Deleting Alerts

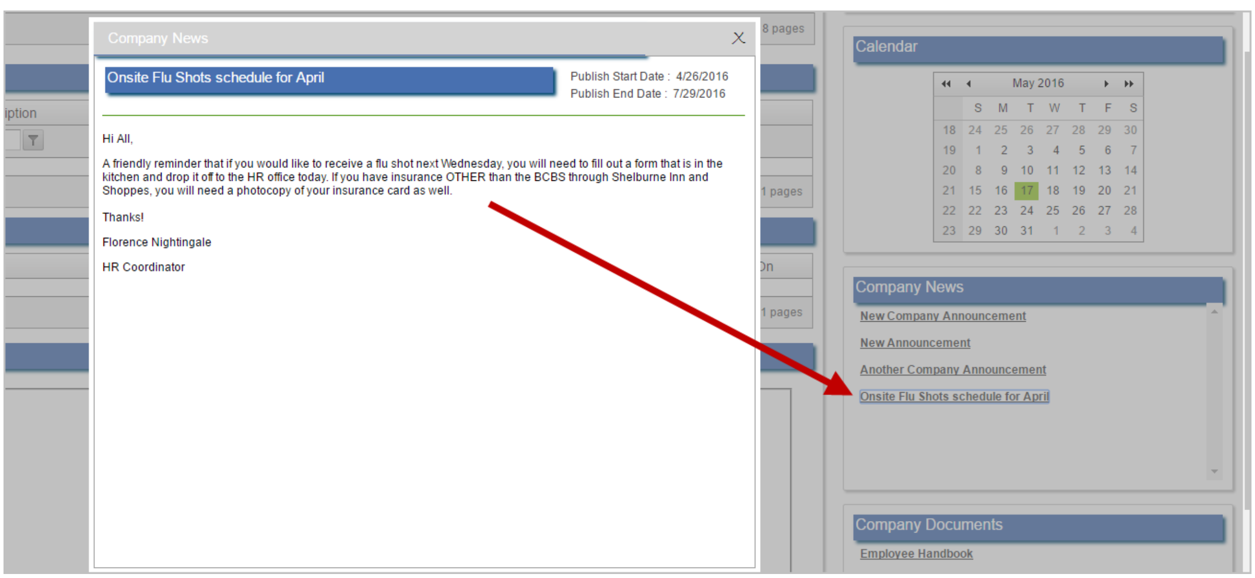
To remove an existing alert, check the box of the alert(s) you want to remove and click the **Delete** button.



Announcements

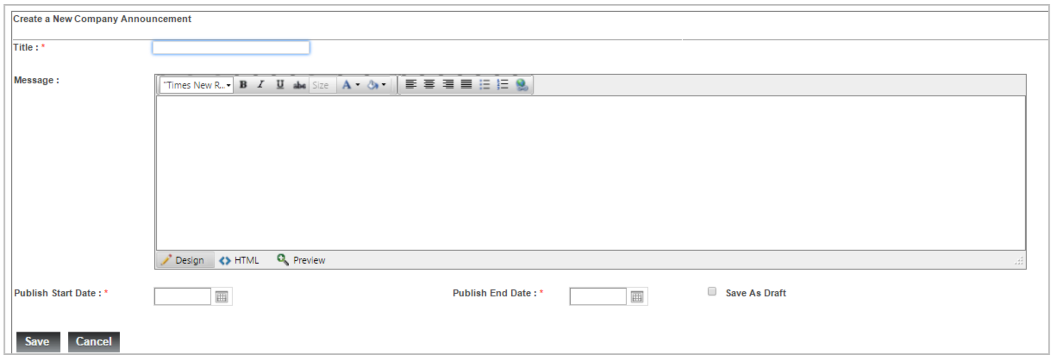
Announcements in Advanced HR are configured to appear on the Advanced HR Home page (in the **Company News** section) during a specified time range.

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



Creating Announcements

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



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

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

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

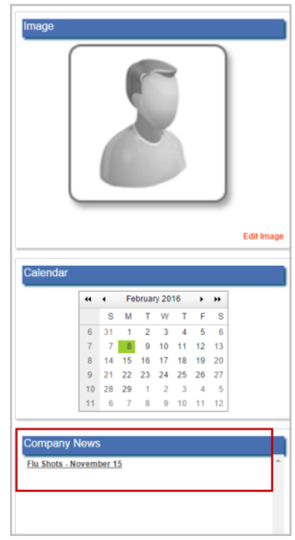
   Click the **Preview** button to see how the announcement will appear before you save it.
4. Enter the message.
5. Enter the **Publish Start Date** and **Publish End Date** (required). This is the date range that you want the announcement to appear on the **Company News** section on the Home page. You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

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

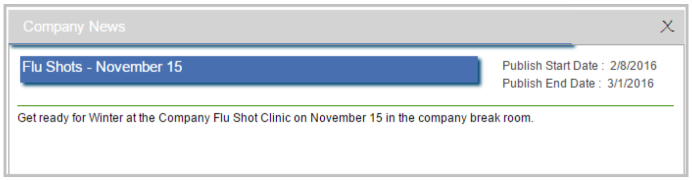
The System returns you to the **Company Announcements** screen; the announcement you just created appears on the screen, along with any other announcements that have been created, in advance of their publish date.

Announcements appear on the Home Page

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



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



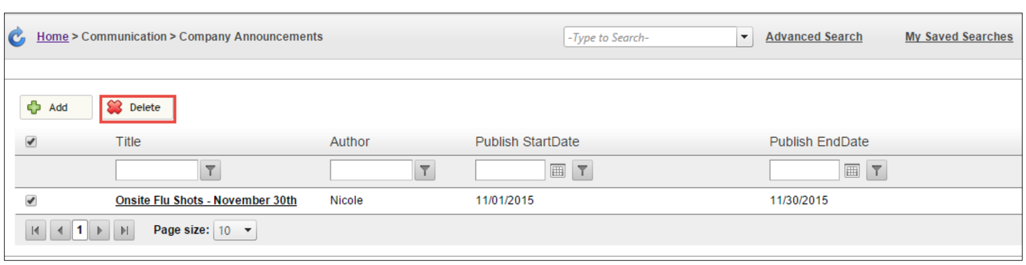
Note that Announcements (& Links) do not get pushed out to the Portal as Alerts do.

Editing Announcements

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

Deleting Announcements

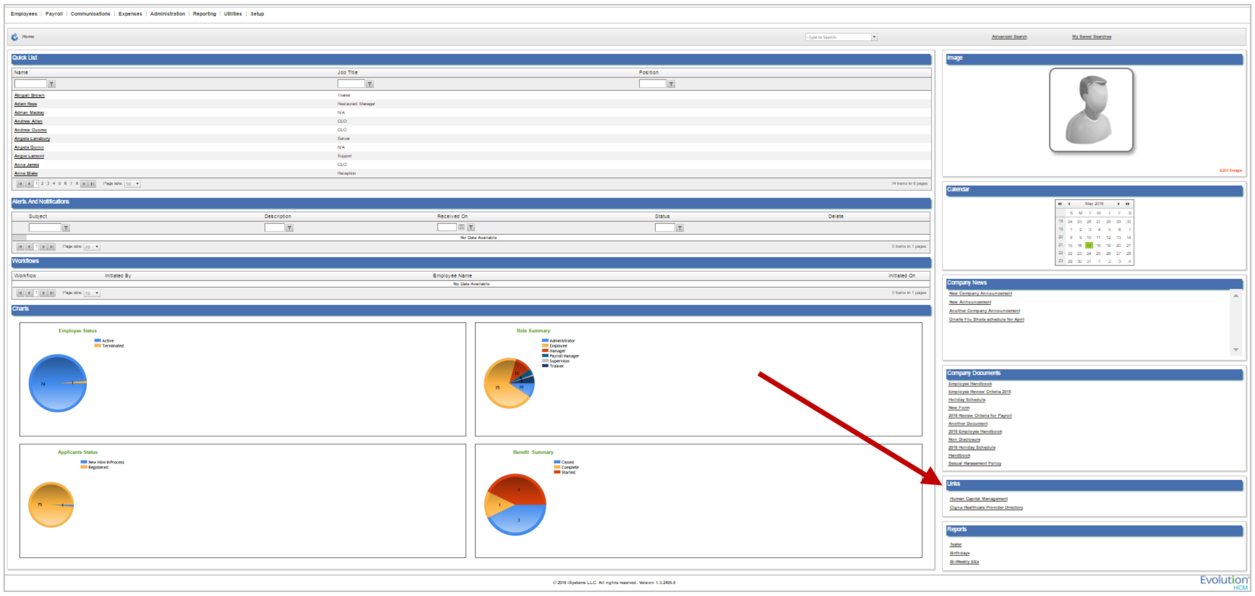
1. From the Advanced HR Home page, click the **Communications** menu item, navigate to **Communication** - **Announcements**.
2. To delete a document, select the check box next to the announcements(s) you want to delete.



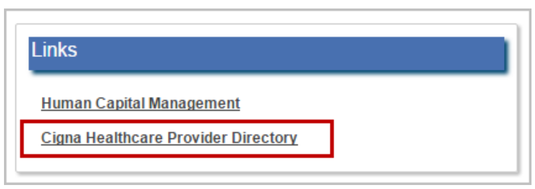
3. Click **Delete**. A dialog box will appear to confirm you would like to delete the announcement(s).
4. Click **Yes**.

Links

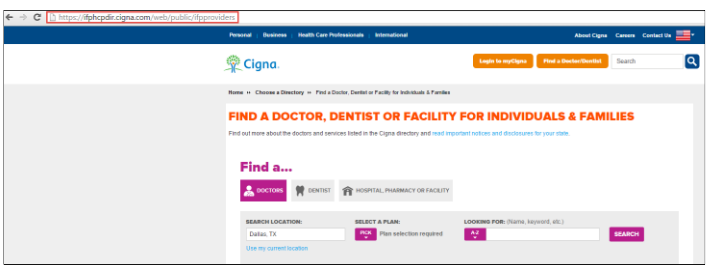
Another feature available from the **Communications** menu in Advanced HR is the **Links** item, which lets you place a clickable link on the Advanced HR Home page – links are shortcuts for URLs – the global address of websites, documents, and other resources on the World Wide Web that would be handy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



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



and can view the destination URL.



Adding Links

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

Editing Links

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

3. Click **Save**.

Deleting Links

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

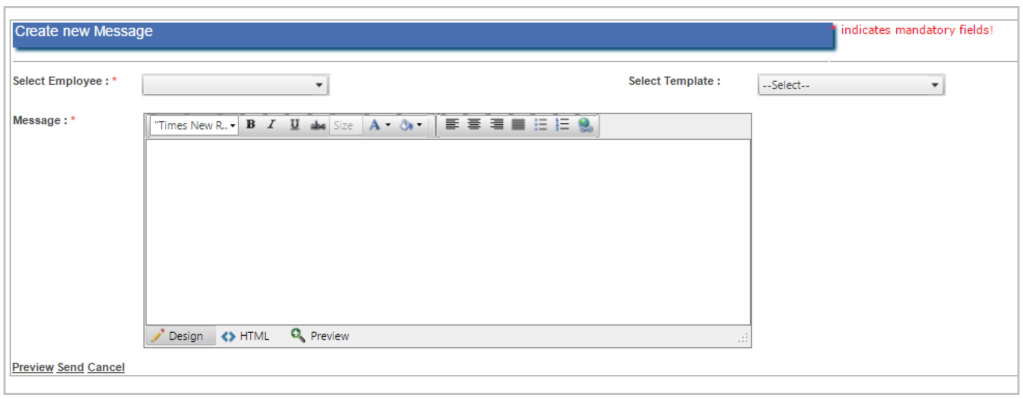
3. Click **Delete**. A dialog box will appear to confirm you want to delete the links(s).
4. Click **Yes**.

Messages

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

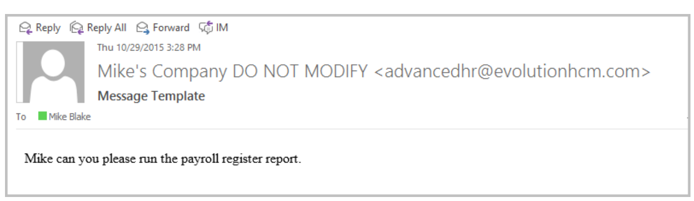
Creating Messages

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



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

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



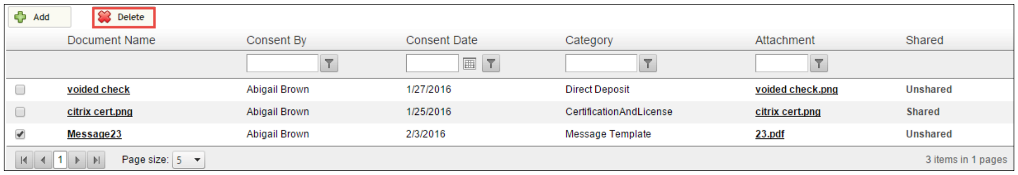
Any message created in this area, will be automatically filed in the Employee Folder in the HR Dashboard. For example, an Administrator that wants to be sure that her email correspondence is part of the permanent folder, could send the email from here, rather than from Outlook.

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

Deleting Messages

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

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



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

Chapter 8: Requisitions & Applicant Tracking

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

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

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

Position Management

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

All **Positions** require the following:

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

Job Profile

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

Recruiting Profile

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

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

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

Requisitions

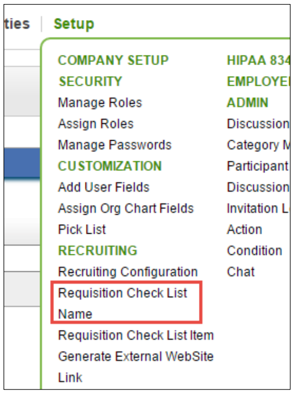
Another benefit of using Evolution Advanced HR's ATS is that it aims to make requisition management a paperless process, as well as a templated one. Predefined qualifications, job responsibilities, requisitions and recruiting profiles turn into an online repository that can easily be modified to create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

Default Table values and dependency set up

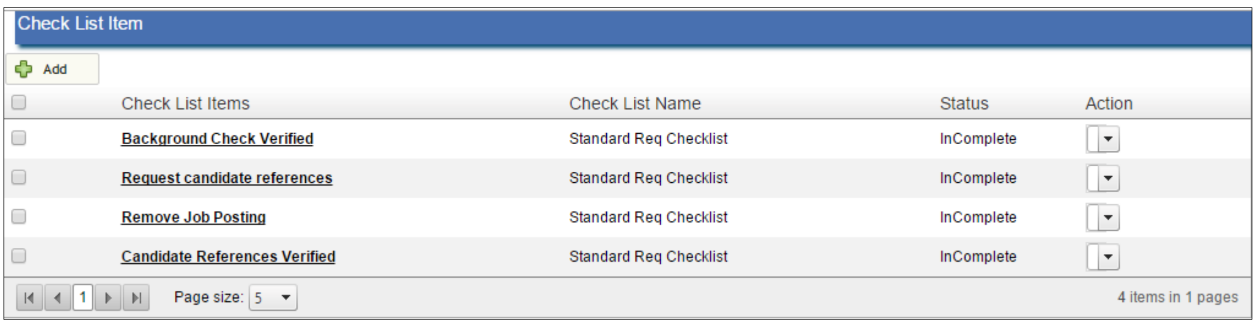
Prior to using the requisition and applicant tracking functionality, Administrators must perform some default table setup. This setup is explained in the *Advanced HR User Guide – Service Bureau* version.

Requisition Check List

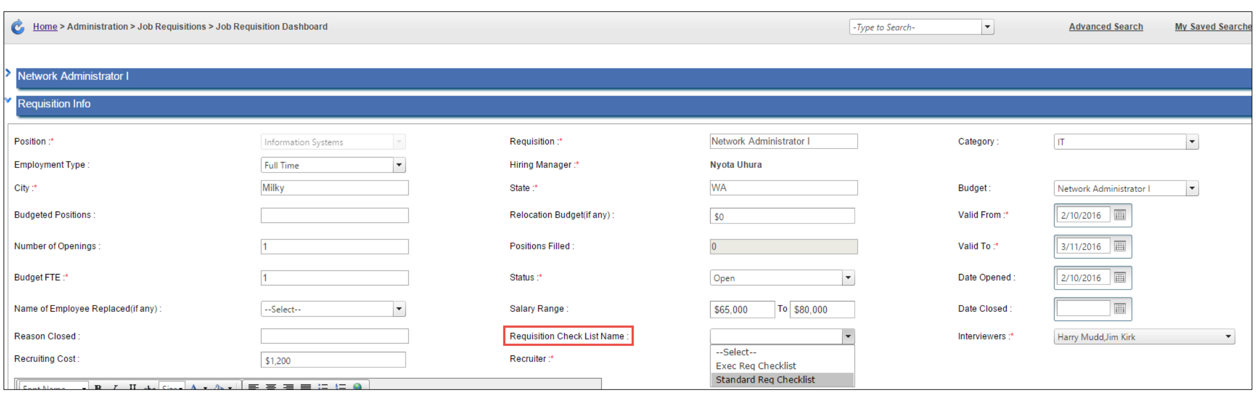
Advanced HR provides the opportunity to create checklists to help facilitate and satisfy internal processes and protocols. To create a requisition checklist:



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



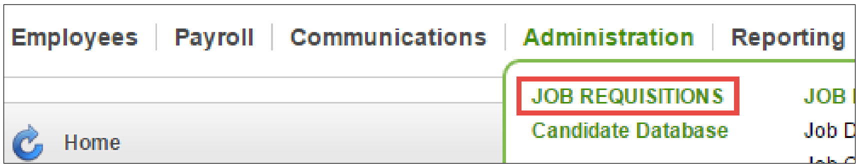
Check list items will now be associated with the Requisition Checklist Name and can be assigned in the Job Requisition Info screen found in **Administration – Job Requisitions – Job Requisition Dashboard** by clicking on the hyperlink to the Job Requisition Name.



Creating a Requisition

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

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



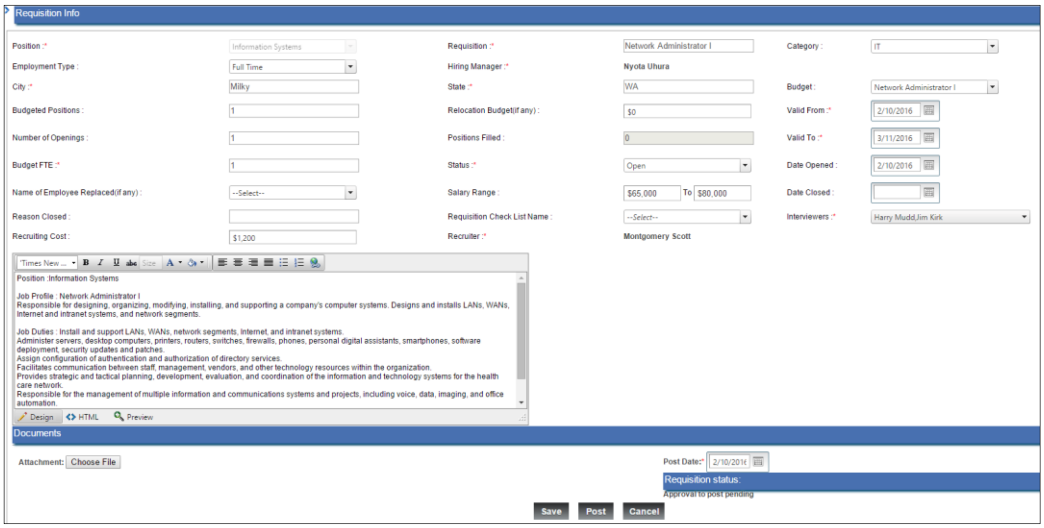
2. The system navigates you to the **Job Requisition Dashboard**. Click **Add**.
3. Enter the **Requisition Information**:

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

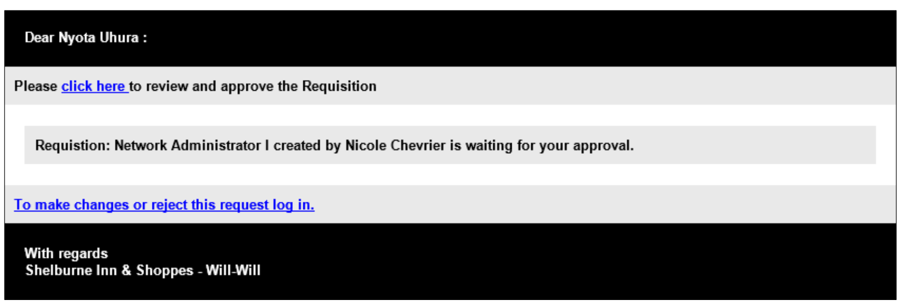
- **Position**: Position for which the requisition is being created (required).
- **Employment Type**: Employment Type of the requisition being created.
- **City**: City in which the position for the requisition is located (required).
- **Budgeted Positions**: Available positions budgeted for the requisition.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

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

4. Click **Save**.



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

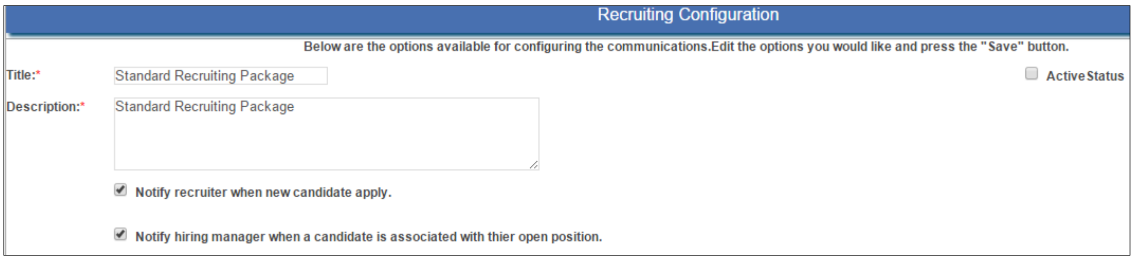


The Requisition Status now appears as: **Approval to post pending**.

Recruiting Configuration

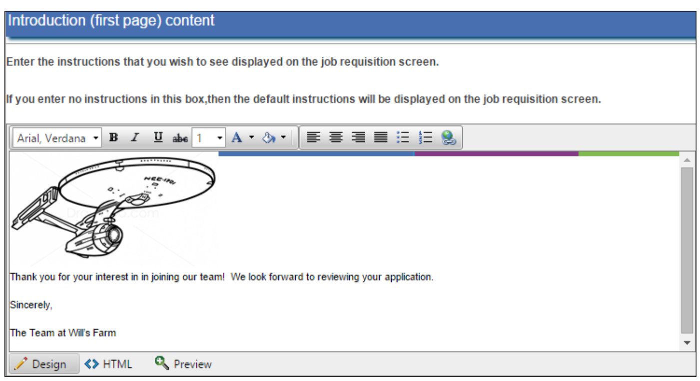
Evolution Advanced HR provides HR Administrators and Recruiters the opportunity to customize messaging to applicants as well as the ability to manage notifications sent involving recruiting team members. To configure recruiting:

1. Go to **Setup – Recruiting Configuration**.
2. Enter Recruiting Configuration information:



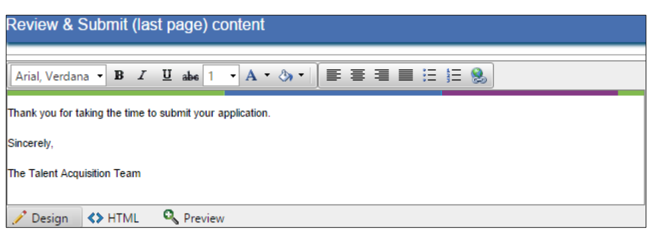
- **Title**: Title of the Recruiting Configuration setup.
- **Description**: Description of the Recruiting Configuration setup.
- **Notify recruiter when new candidates apply**: Check the box to enable email notifications to the recruiter when new candidates apply.
- **Notify hiring manager when a candidate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

3. Enter **Introduction (first page) content**:



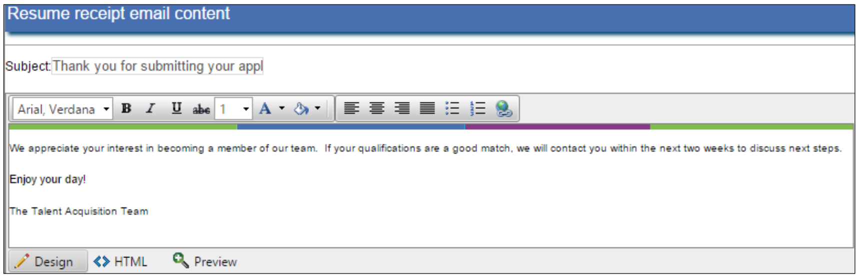
- Enter the instructions that you wish to see displayed on the job requisition screen.

4. Enter **Review & Submit (last page) content**:



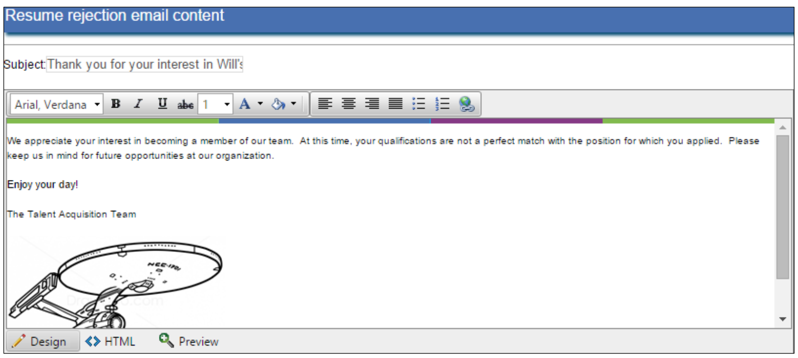
- Enter the message that you wish to see displayed on the last screen of the application process.

5. Enter **Resume receipt email content**:



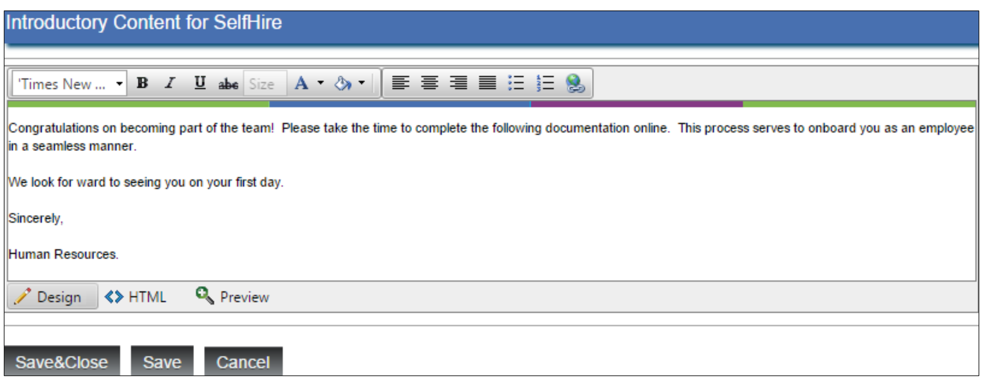
- Enter the Subject line and email notification message that you would like the applicant to receive upon submission of their application.

6. Enter **Resume rejection email content**:



- Enter the Subject line and email notification message that you would like the applicant to receive upon rejection of their application.

7. Enter the **Introductory Content for Self Hire**:



- Enter the message that you would like the candidate to see on the self hire screen.

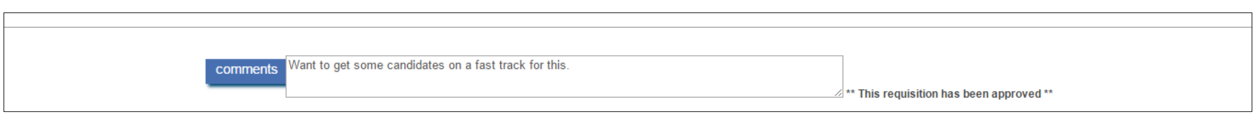
8. If you have completed entering your information, click the **Active Status** in the Recruiting Configuration section.
9. Click **Save & Close**.

Click **Save** often during the setup to prevent losing any content while completing the recruiting configuration.

Approving and posting a requisition

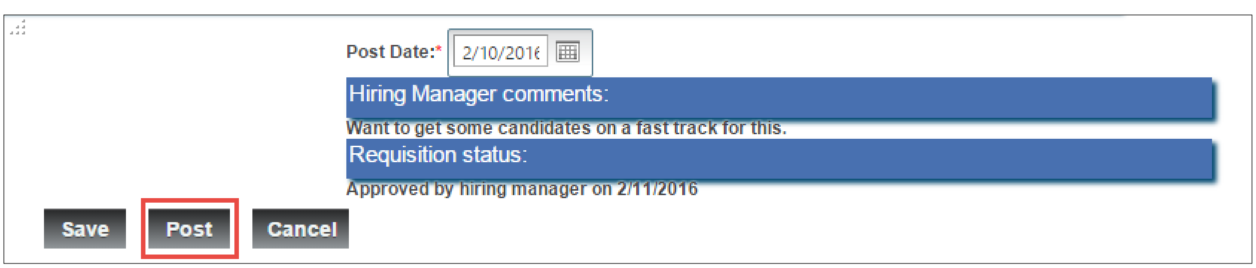
1. The Hiring Manager receives the email notification, and clicks on the “click here” hyperlink to review the details of the requisition.

2. The Hiring Manager clicks **Approve** to approve the Requisition or **Reject** to reject the requisition and can add a message in the **Comments** text box.



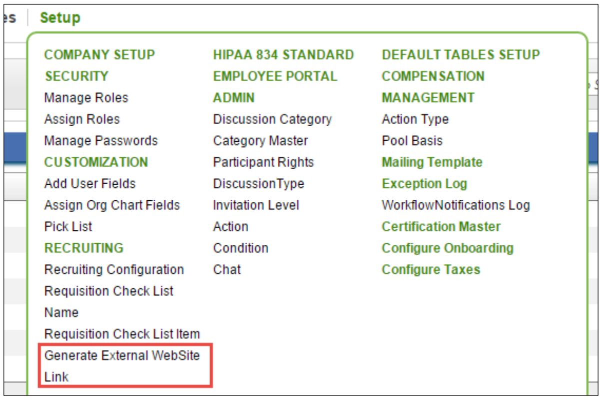
After clicking **Approve**, a message indicates “****This requisition has been approved****”.
An email notification is sent to the Administrator that the requisition has been approved. An email notification is also sent to the Recruiter that the requisition has been approved.

3. The Recruiter opens the requisition in the Job Requisition Dashboard (**Administration – Job Requisitions – Job Requisition Dashboard**) and clicks **Post** to post the requisition.



After clicking **Post**, an email notification is sent to the Hiring Manager that the requisition has been posted. An email notification is also sent to the Recruiter that the requisition has been approved.

4. The Recruiter navigates to **Setup – Generate External Website Link** to generate the External Web Link to the online applicant portal.

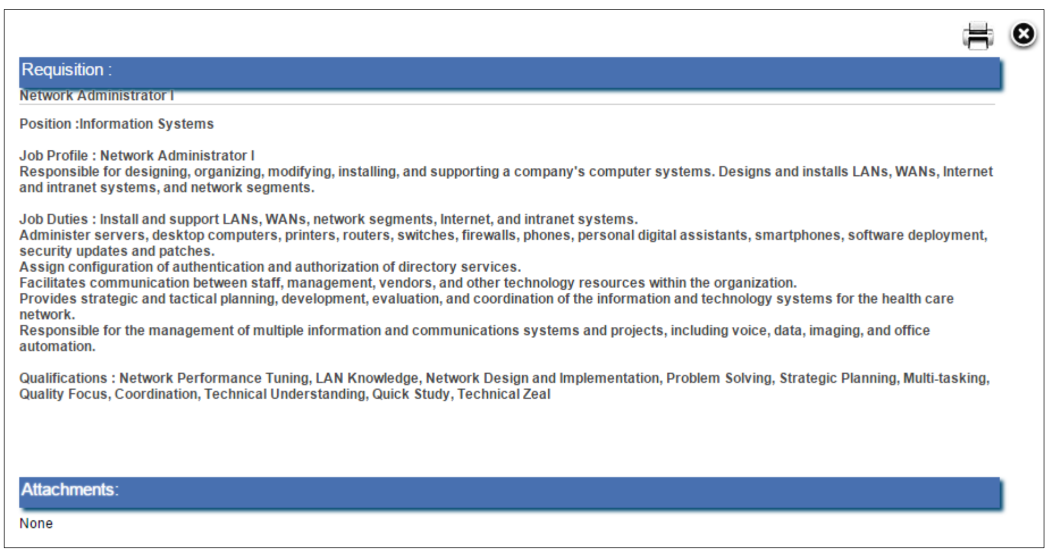


This URL may then be posted on external job boards or an internal careers site to provide interested parties the ability to apply and submit their resumes online.

Important: Once posted, a requisition cannot be edited.

Online application process

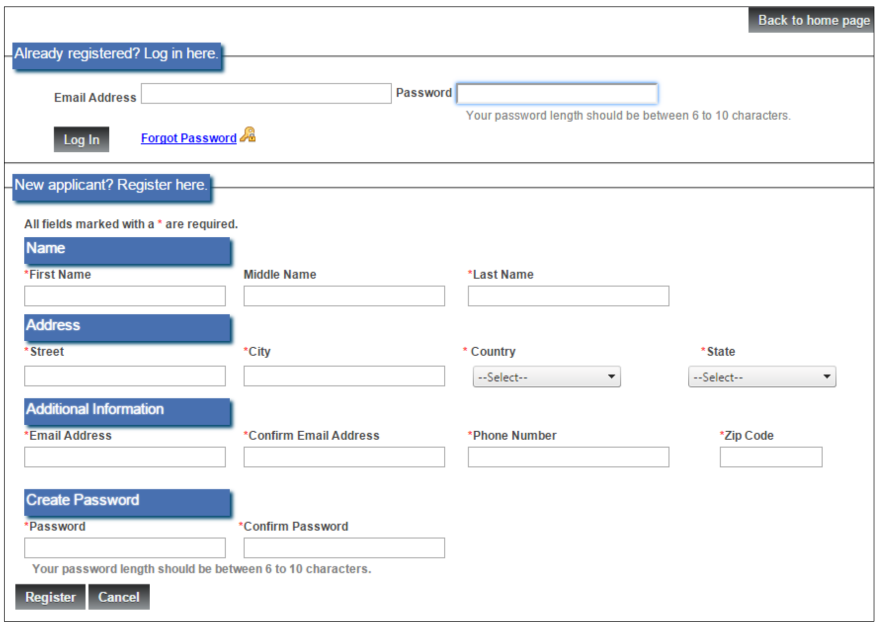
1. The applicant selects the Requisition Title of the Job/Position title Open Position to view the job description and related attachments via the online applicant portal.



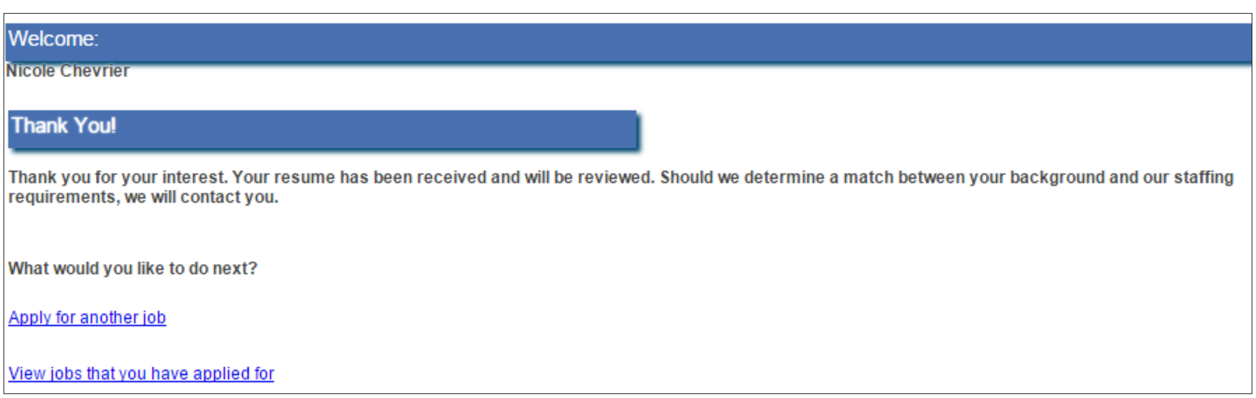
- The applicant can close out of the requisition by clicking on the X and to print the requisition by clicking on the printer icon.

2. The applicant closes out of the requisition review to the applicant portal, registers (as a first time user) or as a registered user, logs in by clicking on the appropriate button.

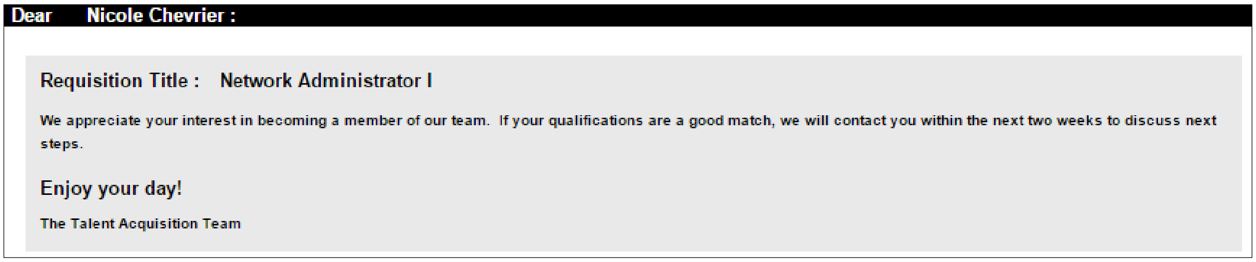
3. The Applicant completes the registration/logs in.



4. The Applicant selects the Requisition Title to apply for the indicated Job/Position Title and clicks **Apply**. The applicant will be taken through the Recruiting Configuration screens, completes the application questions and uploads resume and any additional documents such as a cover letter.
5. The applicant clicks the **Sign button** to attest the application.
6. The applicant clicks the **Submit** button receives a “Thank you for applying” screen in the applicant portal.



The applicant receives an email acknowledging receipt of their application to the requisition.


Dear Nicole Chevrier :

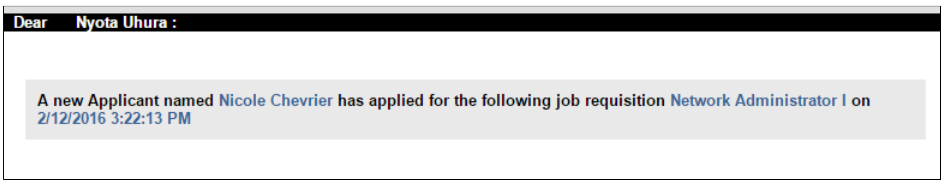
Requisition Title : Network Administrator I

We appreciate your interest in becoming a member of our team. If your qualifications are a good match, we will contact you within the next two weeks to discuss next steps.

Enjoy your day!

The Talent Acquisition Team

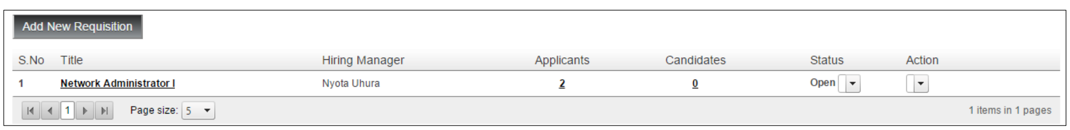
An email notification is sent to the recruiter that an applicant has applied for the position.
An email notification is also sent to the hiring manager that an applicant has applied for the position.

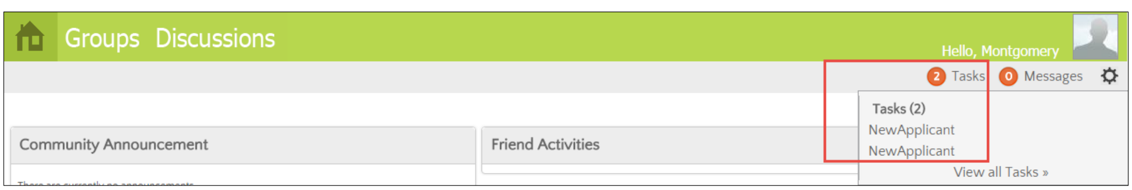

Dear Nyota Uhura :

A new Applicant named Nicole Chevrier has applied for the following job requisition Network Administrator I on 2/12/2016 3:22:13 PM

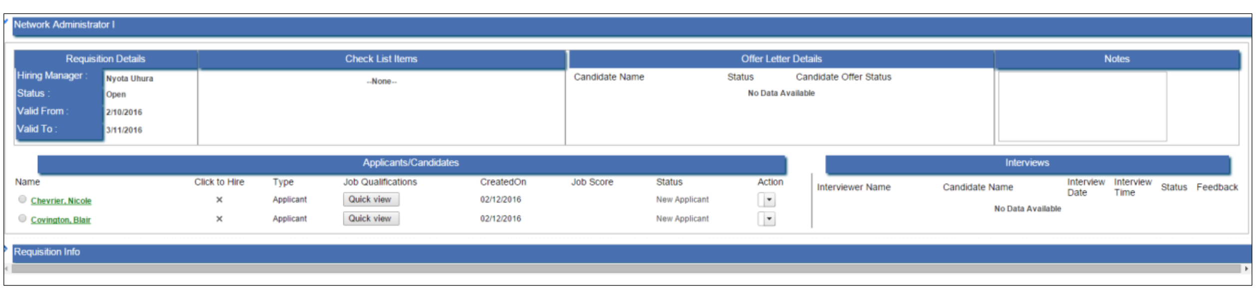
Administration of applicants to posted requisitions

1. The recruiter navigates to the **Administration – Job Requisitions – Job Requisition Dashboard**. This view allows the recruiter to see all of their requisitions and a total of the applicants for each. The recruiter will also receive notification of a new applicant(s) via a task in the Employee Portal.





2. The recruiter clicks on the hyperlink of the Requisition title to review the applicants. Applicants that have satisfied any knock-out value criteria are listed in red.



- Click on the **Quick View** button to view a side-by-side comparison of the job qualifications and the experience and skill set the applicant supplied in the application.

Note: The employee in the role of recruiter is the only person who is able to convert an applicant to a candidate or reject an applicant.

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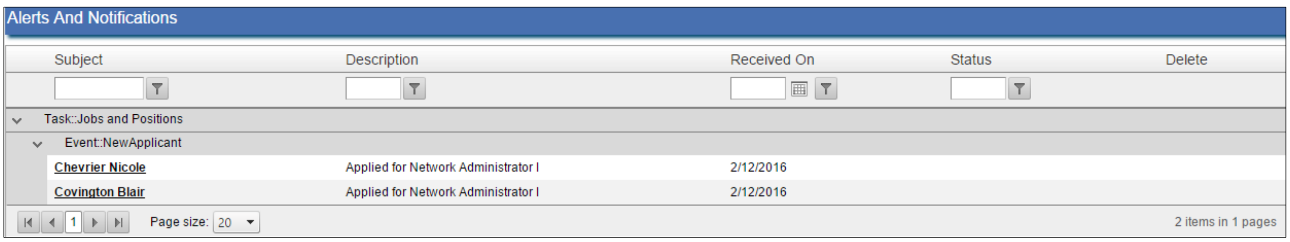
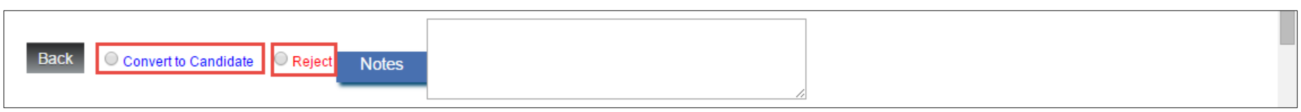
3. The recruiter clicks on the hyperlink of the applicant's name, to further review the applicant's submission.

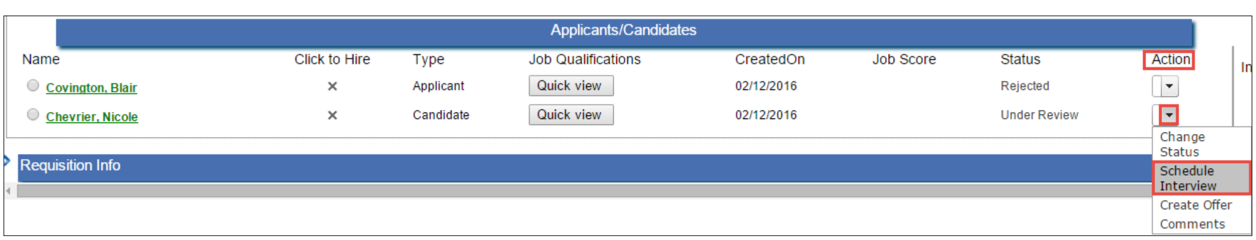


4. The recruiter clicks to **Convert to Candidate** or to **Reject** the applicant, and to add any notes concerning the applicant.

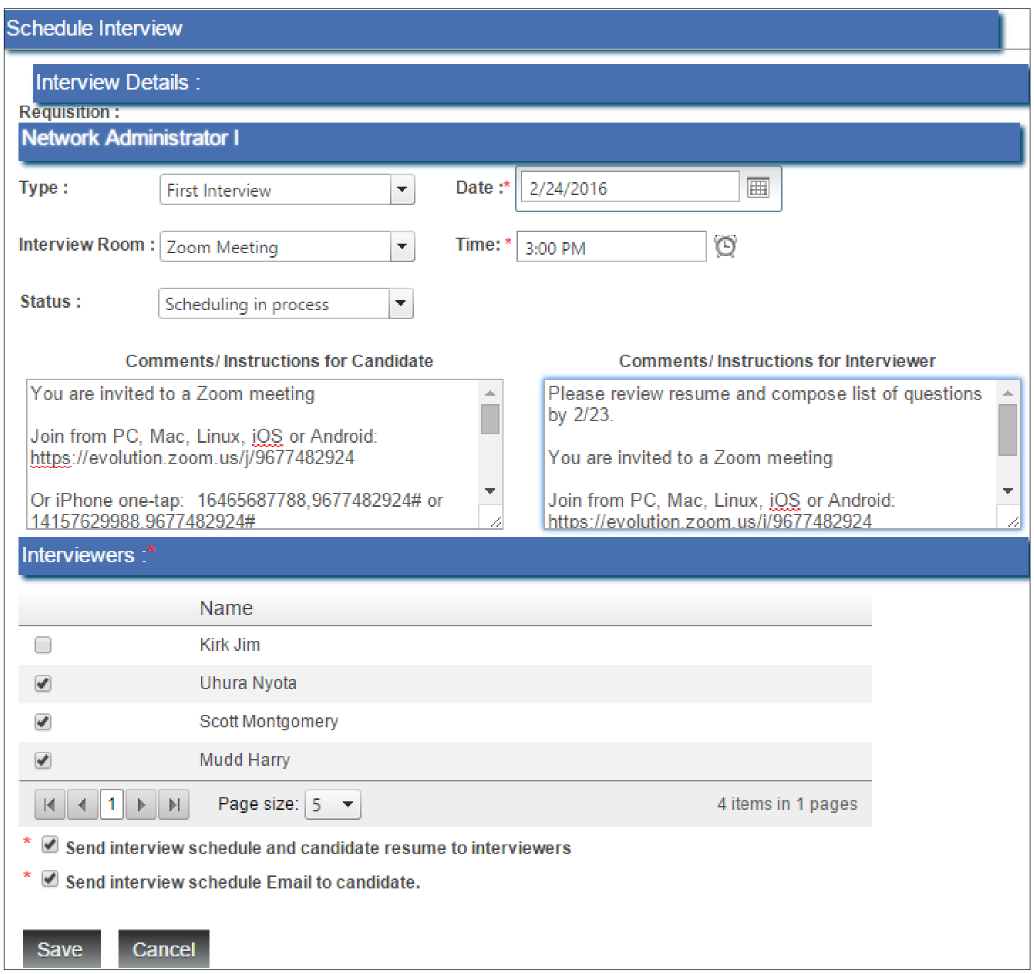


- If the hiring manager clicks **Convert To Candidate**, the applicant **Status** changes to "Under Review" and the **Type** updates to "Candidate".
- If the hiring manager clicks **Reject**, the candidate is notified via email that they are no longer in contention as a potential candidate for the position and the **Status** in the dashboard for the applicant is updated to "Rejected", the **Type** remains.

5. The recruiter clicks the **Action** dropdown menu and selects **Schedule Interview**.

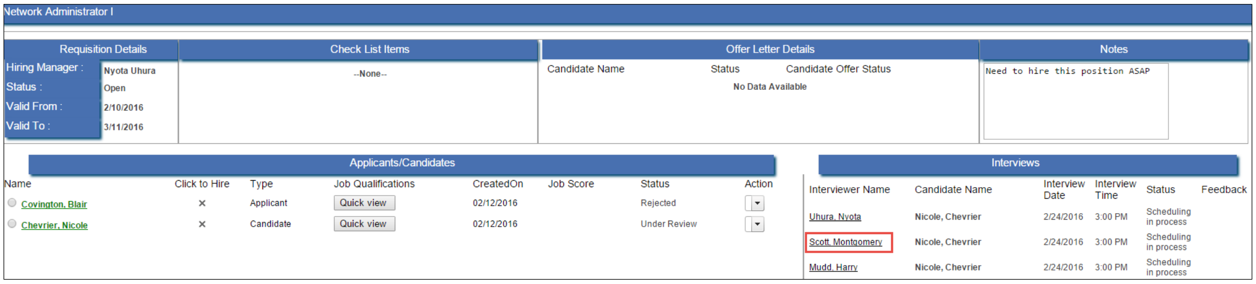


6. The recruiter enters the following information to schedule the interview:
    - **Type**: Interview Type (requires Default Table Setup. Jobs and Positions – Interview Type).
    - **Interview Room**: Interview Room (requires Default Table Setup. Jobs and Positions – Interview Room).
    - **Status**: Interview Status (requires Default Table Setup Jobs and Positions – Interview Status).
    - **Date**: Interview date (required).
    - **Time**: Interview time (required).
    - **Comment/Instructions for Candidate**: Enter text that will be received in the Interview Schedule Notification email to the candidate.
    - **Comment/Instructions for Interviewer**: Enter text that will be received in the Interview Schedule Notification email to the interviewer(s).
    - **Interviewers**: Select the interviewer(s) by checking the box next to the employee name.
    - **Send interview schedule and candidate resume to interviewers**: Checking this box sends the interview schedule and candidate resume via email to the interviewer(s).
    - **Send interview schedule email to candidate**: Checking this box sends the interview schedule via email to the candidate.

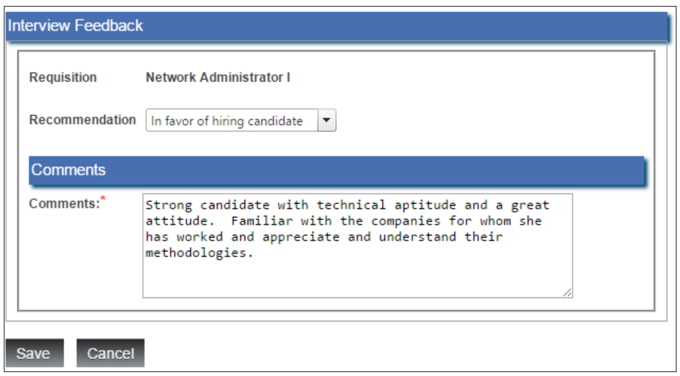


- Scheduled Interviews appear in the Interviews pane within the requisition on the Job Requisition dashboard.

7. Interviewer(s) access the Interview Schedule pane within the requisition from the Job Requisition Dashboard and click on the hyperlink of their name.



8. Interviewer(s) add Interview feedback and click **Save**.

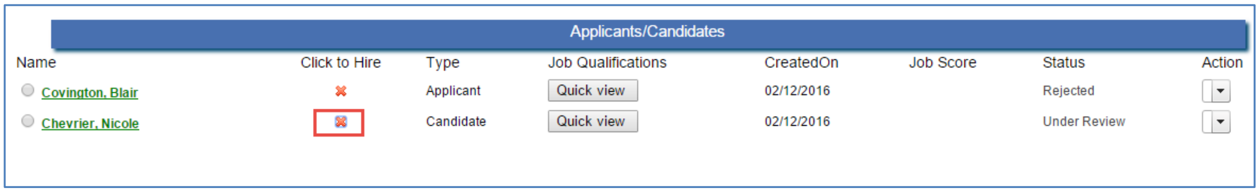


- **Recommendation**: Interviewer hiring recommendation (requires Default Table Setup. Jobs and Positions - Recommendation).
- **Comments**: Text concerning the candidate following their interview. Once the Interview Feedback is saved,, this text will become visible in the Interviews pane within the requisition.

Interviews

Interviewer Name	Candidate Name	Interview Date	Interview Time	Status	Feedback
Uhura, Nyota	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	No need for second interview, am satisfied that this is the candidate for the job.
Scott, Montgomery	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	Strong candidate with technical aptitude and a great attitude. Familiar with the companies for whom she has worked and appreciate and understand their methodologies.
Mudd, Harry	Nicole, Chevrier	2/24/2016	3:00 PM	Scheduling in process	Not sure about core competencies, but on board overall.

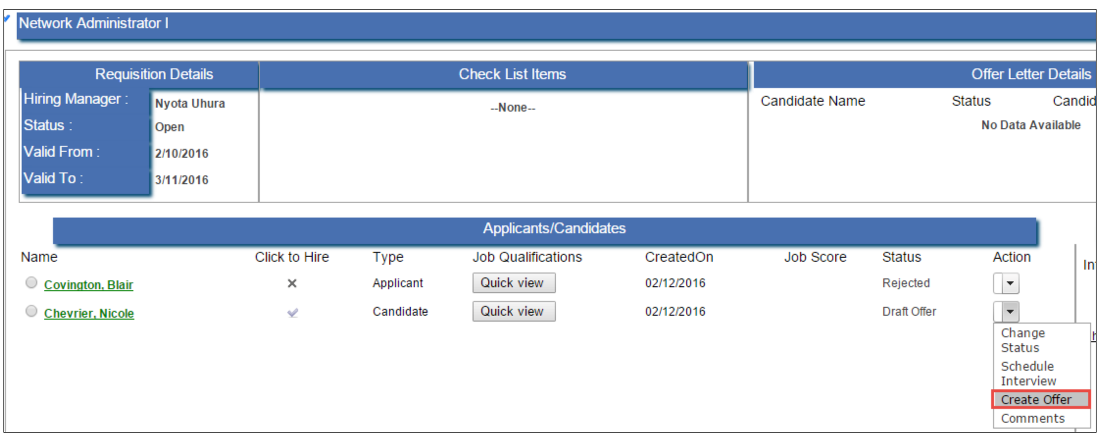
9. Once interview feedback has been entered, the hiring manager accesses the Requisition and clicks the **X** in the **Click to Hire** column next to the candidate that has been selected to hire.



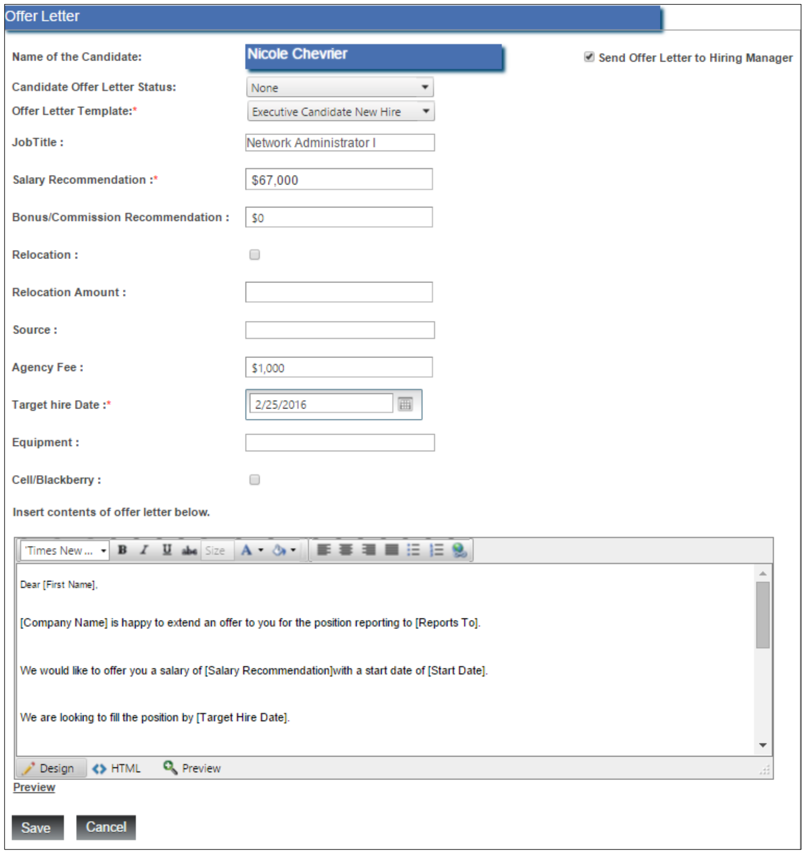
10. A dialog box will appear with a confirmation message "Do you want to hire this candidate?" **Click OK.**

- The **Click to Hire** will now contain a green checkmark and the Status will update from "Under Review" to "Draft Offer".
- The recruiter receives an email notification that the candidate was approved to hire for the requisition.

11. Upon receiving approval for hiring the candidate for the requisition, the recruiter accesses the requisition and selects "Create Offer" from the **Action** drop down menu.



12. The recruiter completes the Offer Letter:



- **Name of the Candidate**: Auto populated with the candidate name.
- **Candidate Offer Letter Status**: Select from dropdown menu.
- **Offer Letter Template**: Templates are set up in **Communication – Templates** (required).
- **Relocation**: Check box if relocation is part of the offer.
- **Relocation Amount**: Dollar amount for relocation as part of the offer.
- **Source**: Source for the requisition.
- **Agency Fee**: Agency fee for the requisition.
- **Target Hire Date**: Target hire date for the requisition (required).
- **Equipment**: Equipment provisioned for the position.
- **Cell/Blackberry**: Check box to indicate phone is provisioned for the position.
- **Contents of the Offer Letter**: Auto populated with the contents of the Offer Letter Template. *Adjust content to personalize as necessary.*
- **Send Offer Letter to Hiring Manager**: Check box to send email notification to the hiring manager to review the draft offer letter.

13. Click **Save.**
    - The Hiring Manager receives email notification containing the details of the draft offer letter to the candidate for approval.

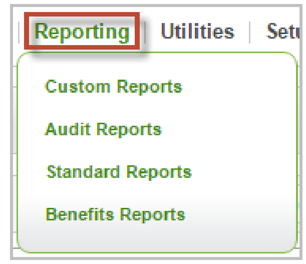
Dear Nyota Uhura :

Please review the draft offer letter for Nicole Chevrier	Please click here to approve the offer letter
JobTitle	Network Administrator I
Salary Recommendation	$67,000.00
Bonus	$0.00
Relocation	No
Relocation Amount	$0.00
Source	
AgencyFee	$1,000.00
Target HireDate	2/25/2016
Equipment	
Cell	No
Additional Instructions :	Dear Nicole, Shelburne Inn & Shoppes - Will is happy to extend an offer to you for the position reporting to Nyota Uhura. We would like to offer you a salary of $67,000.00with a start date of [Start Date]. We are looking to fill the position by 2/25/2016. Please let us know your decision within 5 business days from receipt. Please feel free to reach out to your recruiter with any questions. Congratulations and we look forward to hearing from you! Sincerely, The Talent Acquisition Team

14. The Hiring Manager clicks on the “Please click here to approve the offer letter” hyperlink contained in the email.

Note: At the end of the requisition process, you must still perform the Add New Hire process to officially add a new hire to the system; the Applicant Tracking and Requisition feature does not automatically add a new hire. Refer to the *New Hire Workflow* section in this document.

Chapter 9: Reports



The Advanced HR **Reporting** menu provides access to the following reporting related features:

- Custom Reports
- Audit Reports
- Standard Reports
- Benefits Reports

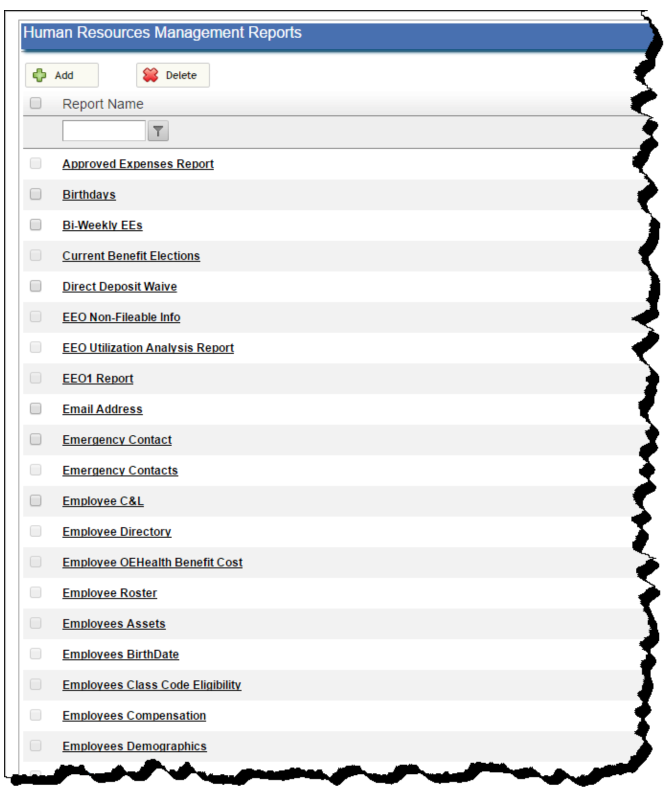
Using Standard Reports

Standard Reports in Advanced HR are a combination of custom reports that have been saved for editing and an extensive library of reports that ship with the product and are not editable by users. All of the custom defined reports you have created will show in addition to the built-in reports and are combined into a single list for review.

You can use the Export button to export a standard report to Excel, PDF, Word, and other file types.

To use a standard Advanced HR report:

1. On the Advanced HR Home page, click the **Reporting** menu item.
2. On the **Reporting** menu, click the **Standard Reports** menu item.
   Result: The system displays the **Human Resources Management Reports** screen.



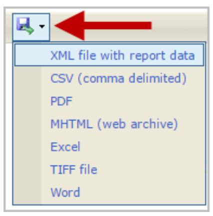
3. Click on the link for the report that you want to run, for example, **Employee Roster**.
   Result: The system displays the report results on a separate tab on the screen.

Employee Roster

Company Name: Shelburne Inn & Shoppes **Run Date:** 06/13/2016

Employee Name	Job Title	Department	Hire Date	Rate Type	Compensation
todd,leavitt	Assistant to the Assistant Manager		02/19/2016	Weekly	
Adam,Rees	Restaurant Manager		09/08/2013	Weekly	102,000.00
Megan,McCarthey	HR Assistant		02/14/2016	Weekly	
Liam,Mackenzie	N/A		09/17/2013	Weekly	
Gabrielle,Newman	N/A		09/10/2013	Weekly	
Adrian,Mackay	N/A		08/15/2013	Weekly	
William,Carr	N/A		09/10/2013	Weekly	
Gavin,McLean	N/A		09/09/2013	Weekly	
Harry,Randall	N/A		09/01/2013	Weekly	
Jason,Ellison	N/A		09/16/2013	Weekly	
Stephanie,Clark	N/A		09/05/2013	Weekly	
Christopher,Davies	N/A		09/01/2014	Weekly	
Victor,Scott	N/A		09/14/2013	Weekly	
Anne,Blake	Reception		09/13/2013	Weekly	
Wendy,Rees	N/A		09/14/2013	Weekly	
Elizabeth,Ince	N/A		09/06/2013	Weekly	
Abigail,Brown	Trainer		09/01/2014	Weekly	1500
Andrew,Allen	CEO		12/14/2015	Weekly	
Isaac,Mackay	N/A		08/15/2013	Weekly	
Anthony,Leary	Assistant to the Assistant Manager		04/12/2016	Weekly	1300

You can use the Export button to export the report to one of the following types:



Using Custom Reports

Use the **Custom Reports** Reporting menu option as an ad-hoc reporting tool. You can also create and define reports that you want to run in the future.

The Custom Reports feature lets you:

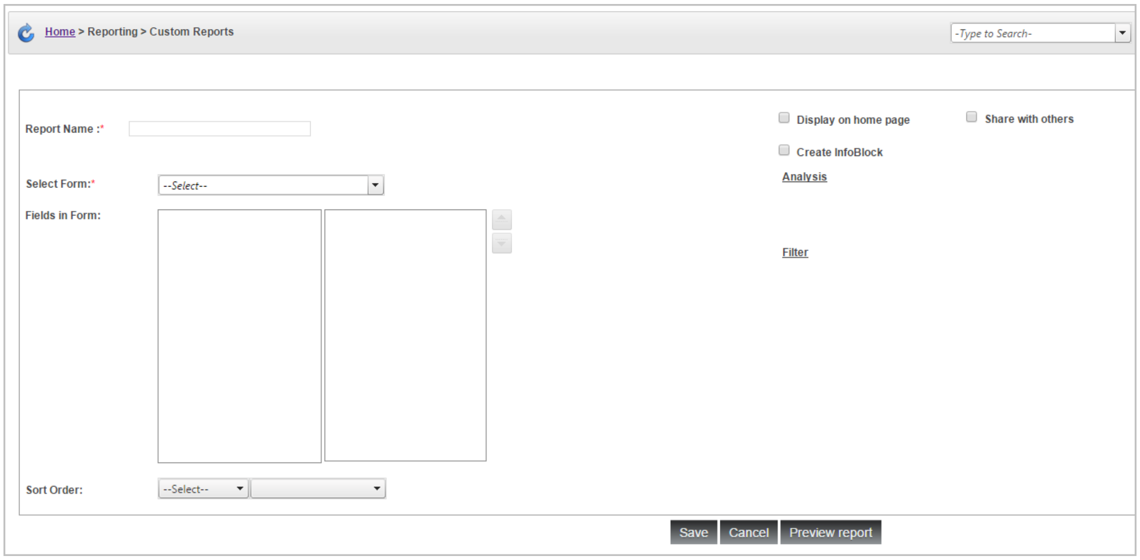
- Have the report results appear on the Home page or on a separate tab from the Reports screen
- Create an InfoBlock (summarized totals)
- Share the report with other people in the organization or run it for you only

Use the custom reports for any additional reporting needs beyond what the standard (built-in) Advanced HR reports provide.

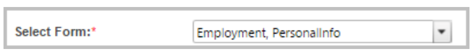
To create a custom report:

1. On the Home page, click the **Reporting** menu item.
2. On the Reporting menu, click **Custom Reports**.

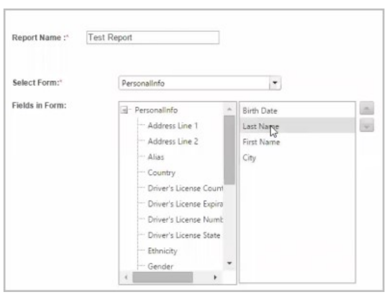
   Result: The system displays the Custom Reports screen.



3. Enter a name for the report in the **Report Name** field.
4. **Select** the **Form** (similar to the screen that you want information from), for example, select **Personal Information**. You can select multiple Form options as shown below.

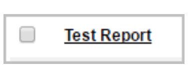


5. In the **Fields in Form** section, click on the Form(s) to list the fields to select from that you want to have on the report. Double-click on the field (or drag it) to move it from the left to the right side of the screen.

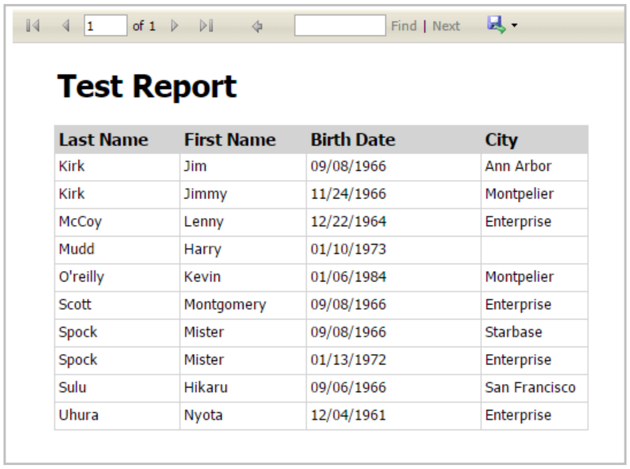


6. Use the **Sort Order** field to sort the data the way you want.
7. Select the **Display on Home page** option to have the report results appear on the Home page.
8. Select the **Share with others** option and a dropdown field appears to the right for you to choose roles to share the report with.

9. Select the **Create InfoBlock** option if you want the report to have summarized information. If so, click the **Analysis** link to set the totaling criteria.
10. Click **Save** to save the report. The system displays a list of the reports including any existing ones already created.



11. To execute the report, click on the report name in the list. The system then runs the report and displays the results. See the sample Test Report below.



Test Report

Last Name	First Name	Birth Date	City
Kirk	Jim	09/08/1966	Ann Arbor
Kirk	Jimmy	11/24/1966	Montpelier
McCoy	Lenny	12/22/1964	Enterprise
Mudd	Harry	01/10/1973	
O'reilly	Kevin	01/06/1984	Montpelier
Scott	Montgomery	09/08/1966	Enterprise
Spock	Mister	09/08/1966	Starbase
Spock	Mister	01/13/1972	Enterprise
Sulu	Hikaru	09/06/1966	San Francisco
Uhura	Nyota	12/04/1961	Enterprise

You can use the Export button to export the report to various types such as Excel, PDF, or Word.

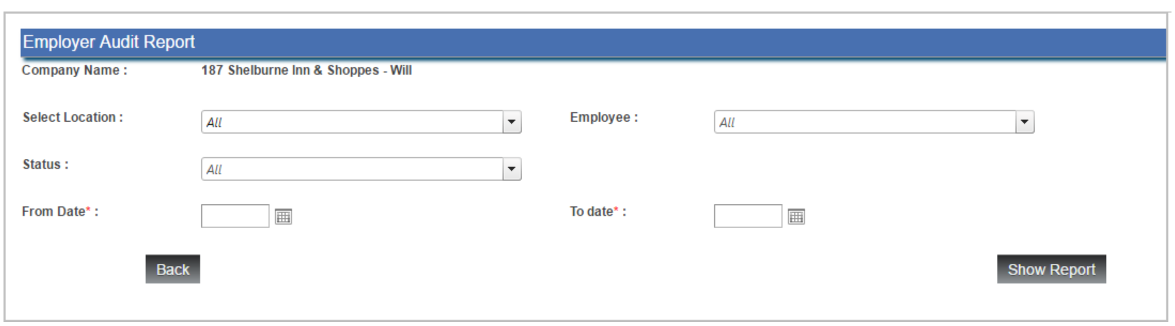
Using Audit Reports

Use the **Audit Reports** Reporting menu option to run audit reports:

- By Location
- By Status
- Specify a Starting Date and Ending Date
- Audit a specific individual employee or all employees

To create an audit report:

1. On the Home page, click the **Reporting** menu item.
2. On the Reporting menu, click **Audit Reports**.
   Result: The system displays the **Employee Audit Report** screen.



3. Select a location from the **Select Location** dropdown.
4. Select a status from the **Status** dropdown.
5. Enter or select a **From Date** (starting date) using the Calendar icon.
6. Enter or select a **To Date** (ending date) using the Calendar icon.
7. Select an employee or all employees to audit from the **Employee** dropdown.
8. Click the **Show Report** button. The system displays the results of the report on a separate tab.

Employee Audit Report

Name	Form Name	Section Name	Field Name	Old Value	New Value	Changed Date	Changed By
Goode Alice	Employment	Employment	Badge Number	EEO1330	manageboth	05/20/2016	Goode Alice
Goode Alice	Employment	Employment	Type		W-2	05/19/2016	Goode Alice
Goode Alice	Employment	Employment	Badge Number	EE01330	agoode	05/19/2016	Goode Alice
Goode Alice	Employment	Employment	Badge Number	agoode	EE330	05/19/2016	Goode Alice
Goode Alice	Employment	Employment	Badge Number	EE330	EEO1330	05/19/2016	Goode Alice
Goode Alice	Employment	Points	Date		05/12/2016	05/12/2016	Blake Mike
Goode Alice	Employment	Points	Comments		Arrived 47 minutes after shift started.	05/12/2016	Blake Mike
Goode Alice	Employment	Points	Reason		Late Without Calling	05/12/2016	Blake Mike

The Employee Audit Report has the following column fields:

- Name
- Form Name
- Section Name
- Field Name
- Old Value
- New Value
- Changed Date
- Changed By

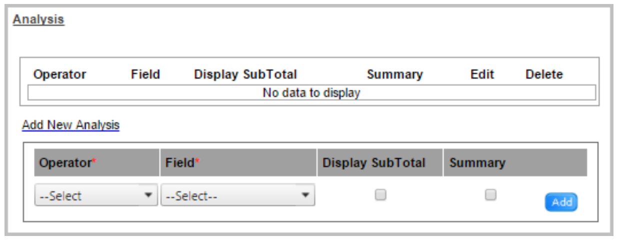
You can use the Export button to export the report to various types such as Excel, PDF, or Word.

Using InfoBlocks

InfoBlocks are a method of creating a particular report (such as a custom report) that has summarized information such as the number of active employees in an organization, then embedding that information into the Manager Portal and into the Landing page of the product. Use an InfoBlock report to produce some sort of summary data. InfoBlocks are a useful option when you are creating a custom report.

For example, to create an infoblock of Active Employees:

1. On the Home page, click the **Reporting** menu item.
2. On the Reporting menu, click **Custom Reports**.
   Result: The system displays the **Custom Reports** screen.
3. Enter a **Name** for the report (for example Active Employees).
4. Select the **Form** (similar to the screen that you want information from), for example, select **Employment** & **Personal Info**. You can select multiple form options.
5. In the **Fields in Form** section, choose **Status** from the **Employment** form. Also select the **Name** field from the **Personal Info** form.
6. Select the **Create InfoBlock** check box.
7. Select the **Analysis** option.
   Result: The screen displays an **Analysis** section.



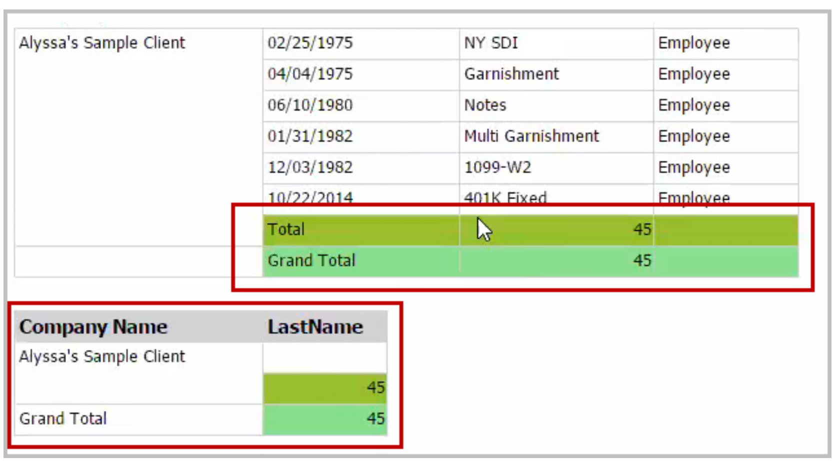
Select these options:

- In the **Operator** field, select **Count**.
- In the **Field** column, select the **Last Name**, **First Name** fields.
- Select **Display Subtotal**.
- Select **Summary**.

8. Click the **Save** button to save the report.
9. You can preview the report by clicking the **Preview Report** button.

For our sample report, here is how we set the Analysis:

And here is a partial preview Sample InfoBlock showing the end section of the report.



The Totals (end section) of the report will also appear on the Home page of Advanced HR.

Selected Reports details

The following sections provide some detail about selected reports available in Advanced Hr:

- EEO-1 Report (S455)
- EEO-1 Section D Employment Data Report (S1537)
- VETS – 100A Report

EEO-1 Report

The EEO-1 Report (S455) is a current 'snapshot' of the number of employees by EEO Class and Descriptions of Ethnicity. This report is required for compliance purposes. The report lists only active employees, not terminated employees.

- The Employee's EEO Code is taken from the **Employment** screen: **Job Class** field:

  Job Class: 6 Craft Workers

- The Employee's ethnicity is taken from the **Employees** – **Personal** screen: **Ethnicity** field:

  Ethnicity :* Hispanic Or Latino

A sample EEO-1 Report is shown below.

EEO-1 Report

EEO Class	Description	Count
0	No EEO Class Assigned	216
1.1	Exec/Sr Level Officials & Managers	0
1.2	First/Mid-Level Officials & Managers	0
2	Professionals	0
3	Technicians	0
4	Sales Workers	0
5	Administrative Support Workers	0
6	Craft Workers	1
7	Operatives	0
8	Laborers & Helpers	0
9	Service Workers	0
	Total	217

Ethnic Code	Description	Head Count
0	Not Applicable/Declined to State	130
1	Black Or African American	6
2	Hispanic Or Latino	5
3	Asian	17
4	American Indian Or Alaska Native	21
5	White	11
6	Other	12
7	Native Hawaiian Or Other Pacific Islander	6
8	Two Or More Races	9
	Total	217

EEO-1 Section D Employment Data Report

The EEO-1 Section D Employment Data Report (S1537) describes how many employees by gender and race are working in each job category in the company. Unlike the regular EEO-1 Report that does not take into account gender (at all) and ethnicity/EEO Class relation, the EEO-1 Section D Employment Report does take gender into account.

A sample EEO-1 Section D Employment Data Report is shown below.

EEO-1 Section D Employment Data Report	
Company	*NEW_2*
Generation Date	*08-23-2016*

JOB CATEGORIES	RACE/ETHNICITY																
	Hispanic Or Latino		Non-Hispanic Or Latino														Total
	Male	Female	Male							Female							
			American Indian Or Alaska Native	Asian	Black Or African American	Native Hawaiian Or Other Pacific Islander	Other	Two Or More Races	White	American Indian Or Alaska Native	Asian	Black Or African American	Native Hawaiian Or Other Pacific Islander	Other	Two Or More Races	White	
Exec/Sr Level Officials & Managers	0	1	0	1	1	0	0	0	0	0	0	0	0	0	0	0	3
First/Mid-Level Officials & Managers	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	0	2
Professionals	0	1	0	2	0	0	0	0	0	0	0	0	0	0	0	1	4
Technicians	0	1	1	0	1	0	0	0	2	0	0	0	0	0	0	0	5
Sales Workers	1	0	0	0	1	1	0	0	0	1	0	0	0	0	0	0	4
Administrative Support Workers	1	1	0	0	0	0	0	1	0	0	1	1	2	0	1	0	8
Craft Workers	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	0	3
Operatives	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Laborers & Helpers	0	0	0	0	1	0	0	0	0	0	0	1	0	0	0	0	2
Service Workers	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
Total	2	4	2	3	4	1	0	2	3	2	1	2	3	0	2	2	33

VETS - 100A Report

The HR VETS – 100A report helpd service bureaus meet their compliance requirements. A sample of the report is shown below.

1 of 1 Find | Next

HR VETS-100A REPORT

JOB CATEGORIES	NUMBER OF EMPLOYEES					NEW HIRES (PREVIOUS 12 MONTHS)				
	DISABLED VETERANS (L)	OTHER PROTECTED VETERANS (M)	ARMED FORCES SERVICE MEDAL VETERANS (N)	RECENTLY SEPARATED VETERANS (O)	TOTAL EMPLOYEES,BOTH VETERANS AND NON-VETERANS (P)	DISABLED VETERANS (Q)	OTHER PROTECTED VETERANS (R)	ARMED FORCES SERVICE MEDAL VETERANS (S)	RECENTLY SEPARATED VETERANS (T)	TOTAL EMPLOYEES,BOTH VETERANS AND NON-VETERANS (U)
No EEO Class Assigned	15	11	12	2	827	14	11	11	2	405
Exec/Sr Level Officials & Managers	0	0	0	0	1	0	0	0	0	0
First/Mid-Level Officials & Managers	0	0	0	0	0	0	0	0	0	0
Professionals	0	0	0	0	0	0	0	0	0	0
Technicians	0	0	0	0	0	0	0	0	0	0
Sales Workers	0	0	0	0	0	0	0	0	0	0
Administrative Support Workers	0	0	0	0	0	0	0	0	0	0
Craft Workers	0	0	0	0	0	0	0	0	0	0
Operatives	0	0	0	0	0	0	0	0	0	0
Laborers & Helpers	0	0	0	0	0	0	0	0	0	0
Service Workers	0	0	0	0	0	0	0	0	0	0
Total	15	11	12	2	828	14	11	11	2	405

Unlike in Evolution Classic, this report in Advanced HR will show the last 12 months and the current number of employees.

Chapter 10: Benefits Enrollment

Initial benefit settings & setup

Administrators must perform some initial benefit setup tasks before end users can access and use the Benefits feature. Refer to the *Advanced HR User Guide – Service Bureau* version.

Available Benefits in Advanced HR

In Advanced HR, users can create the following Benefit Plans and, upon employee enrollment, the appropriate Scheduled E/D will automatically be created.

- Medical
- Vision
- Dental
- Custom plans with configurations similar to the three plans listed above. For example, a gym membership benefit plan structured in a similar manner to one of the plans above.

In Advanced HR, users can also create the plans listed below for employee enrollment, however these will require that the administrator create a scheduled E/D manually for the employee upon enrollment.

- FSA
- HSA
- Life, and AD&D
- Dependent FSA
- 401k
- Short & Long Term Disability

Note: Direct Payroll scheduled E/D integration for these benefit plan types will be available in upcoming releases.

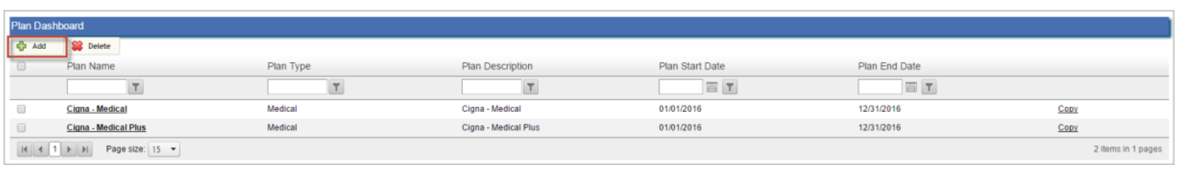
Medical, Dental, and Vision Benefit Plans

In Advanced HR, many types of benefits have very similar setup. For instance, Medical, Dental, and Vision Benefits utilize much of the same logic, and therefore, are set up very similarly. In this section, you will learn how to set up a Medical, Dental, and Vision plans for use with Advanced HR. You may also use this type of plan to set up non-standard "benefits" such as a Gym Membership.

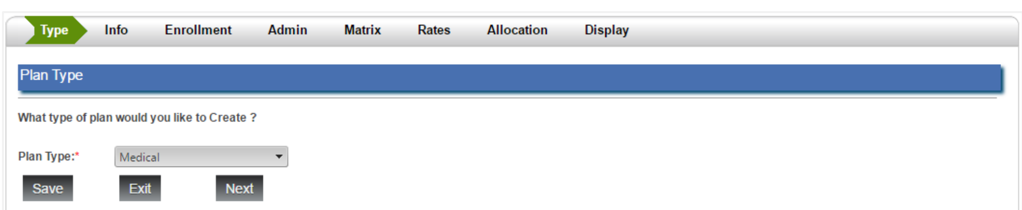
To create a Benefit Plan for Medical, Dental, or Vision:

1. Go to **Administration** – **Benefits**.

2. On the Plan Dashboard, click on the **Add** button.



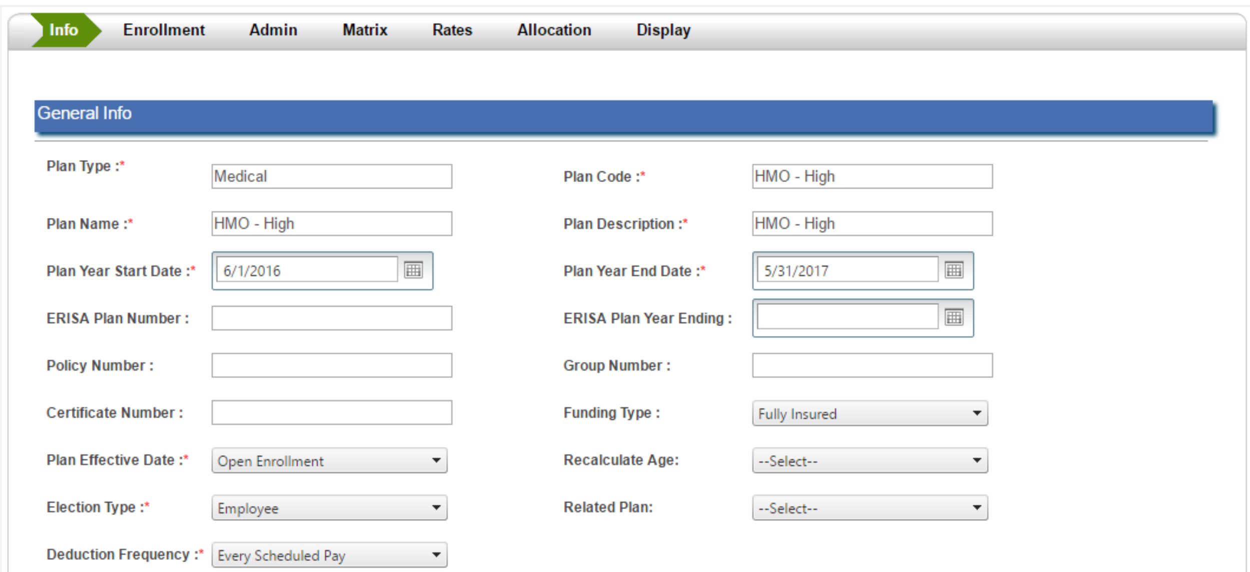
3. Select the **Plan Type** from the drop-down menu.
   - Select **Medical**, **Dental**, or **Vision**, to match the plan you are setting up.



4. Click **Next**.

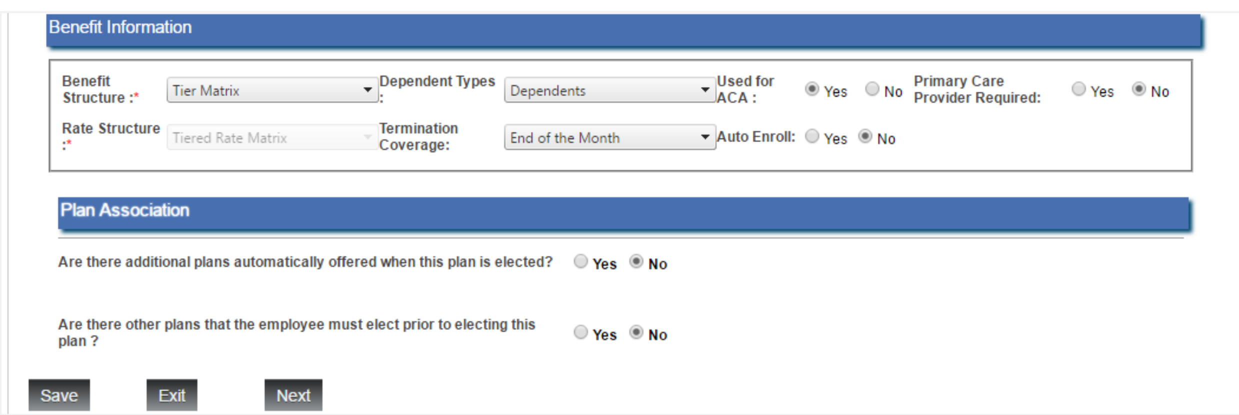
5. Enter the plan information in the **General Info** section. The table below describes the required information.

Field Name	Definition
Plan Type	Defaults to the type chosen from step 3.
Plan Code	Enter the code for this plan. Example – PPO, PPO High, etc. …
Plan Name	Enter a name for this plan.
Plan Description	Enter a description for this plan.
Plan Year Start Date	Enter the first date that this plan will be effective.
Plan Year End Date	Enter the last date that this plan will be effective.
Plan Effective Date	Select from the drop-down list the plan effective date description.
Election Type	Select if this is an Employee or spouse type of election.
Deduction Frequency	Select how often the Benefit will show on the employees stub, and be deducted, if a deduction is to occur.



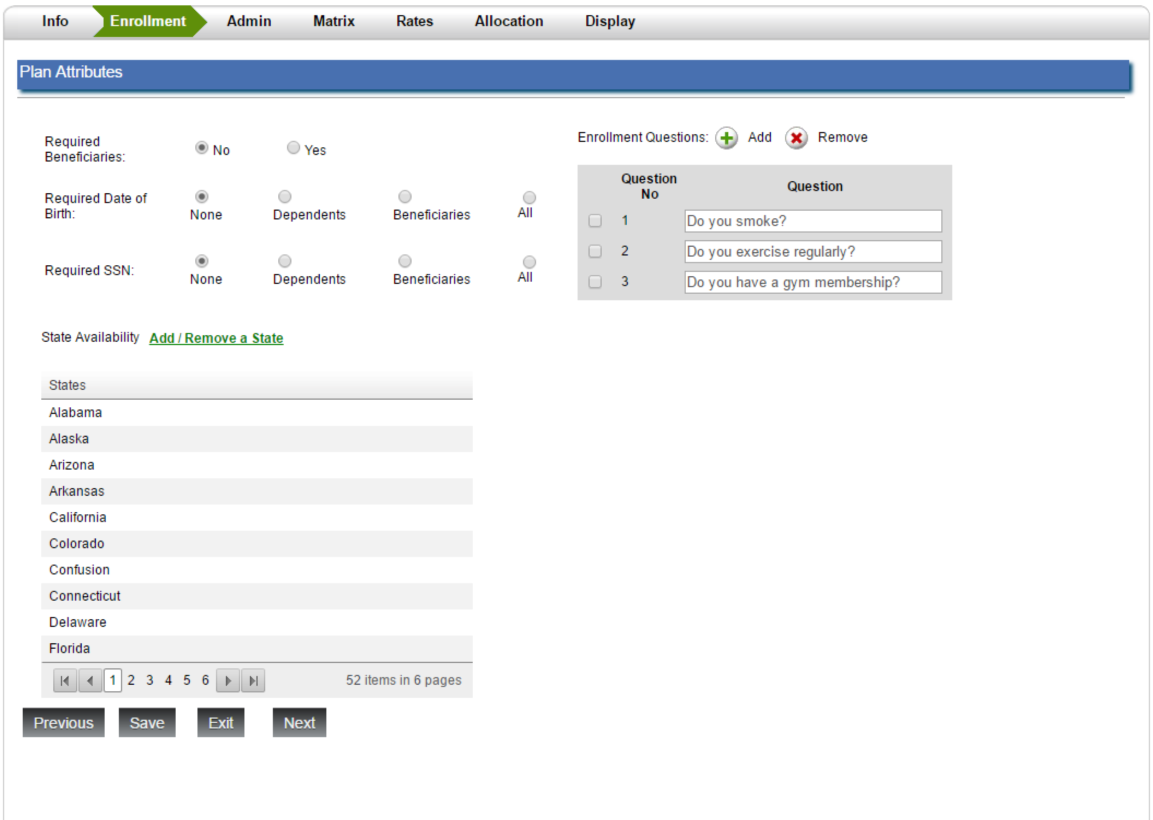
6. Select the information in the **Benefit Information** field. The table below describes these fields:

Field Name	Definition
Benefit Structure	Select the Benefit Structure from the drop-down list. On a Medical, Dental, or Vision plan, the Benefit Structure will always be a Tier Structure.
Rate Structure	Defined by the Benefit Structure selected. On a Medical, Dental, or Vision plan, this will always be a Tiered Rate Matrix.
Dependent Types	Select **Dependent** or **Beneficiary** types. On a Medical, Dental, or Vision plan, only Dependents will be available.
Termination Coverage	In the event of employee termination, should the plan end on the termination date, or the end of the month after termination.
Used for ACA	Select **Yes** if this a Medical Plan that will be used to define ACA Affordability and Coverage.
Auto – Enroll	Select **Yes** if employees will be automatically enrolled in this plan.
Primary Care Provider	Select **Yes** to enter the Primary Care Physician for this plan.
Plan Association	If this plan is to be associated or linked to another plan, click on the **Click Here** link to see additional questions.
Are there additional plans automatically offered when this plan is elected?	Select **Yes** if there are other plans that will be offered in conjunction with this plan. This is often used on Medical Plans when an HSA plan will be offered once the Medical plan has been elected.
Are there other plans that the employee must elect prior to electing this plan?	Select **Yes** if the employee must elect a different plan before they can elect this one. This is often used on an HSA plan that requires a specific Medical plan be selected before the employee can elect the HSA plan.



7. Click **Next**.

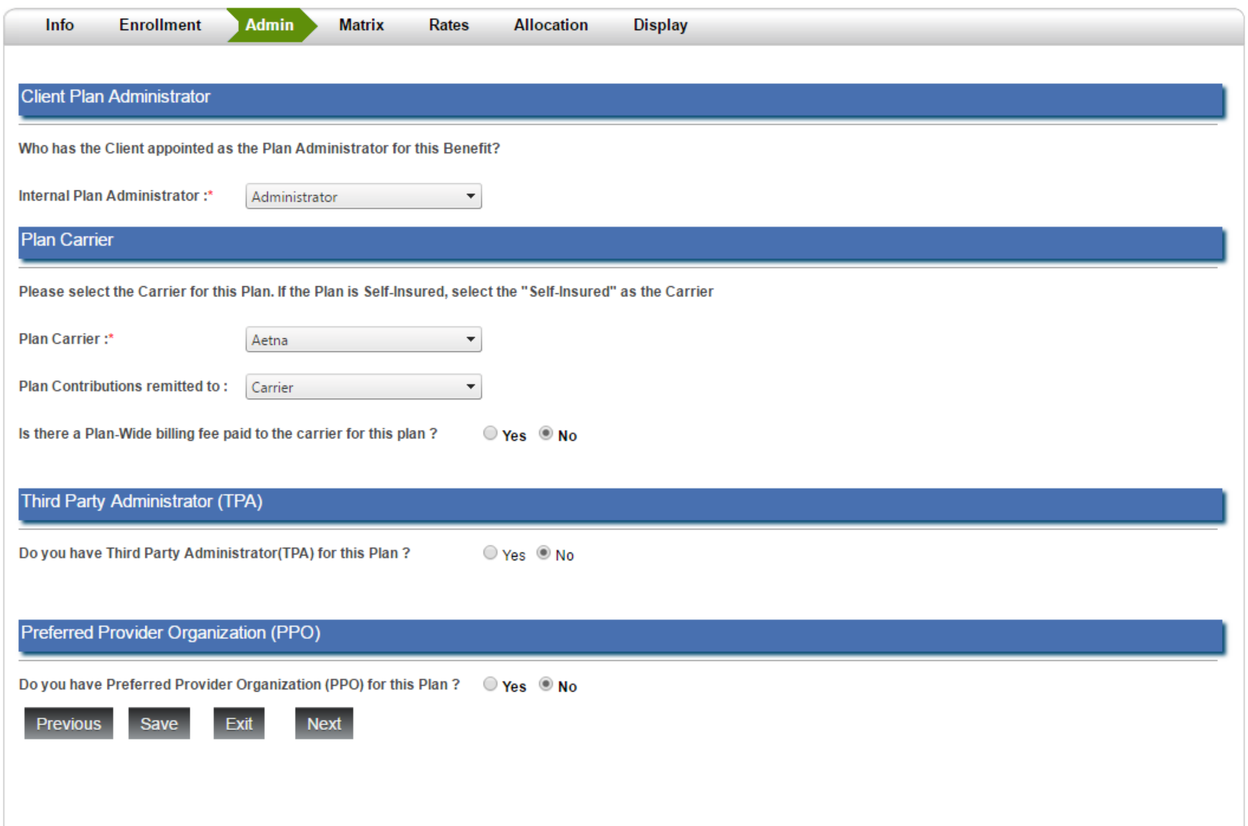
8. On the **Enrollment** tab, select if the benefit will require:
   - Beneficiaries.
   - Date of Birth for Dependents, Beneficiaries, both or none.
   - Social Security Number for Dependents, Beneficiaries, both or none.
9. Click **Add/Remove** states to list the states for which this benefit will be available. Employees who reside within the selected states will be able to enroll in this benefit, provided they are eligible for benefits enrollment.
10. Click the Plus sign to add additional enrollment questions. Each benefit has the ability to have three (3) additional enrollment questions.



11. Click **Next** when complete.

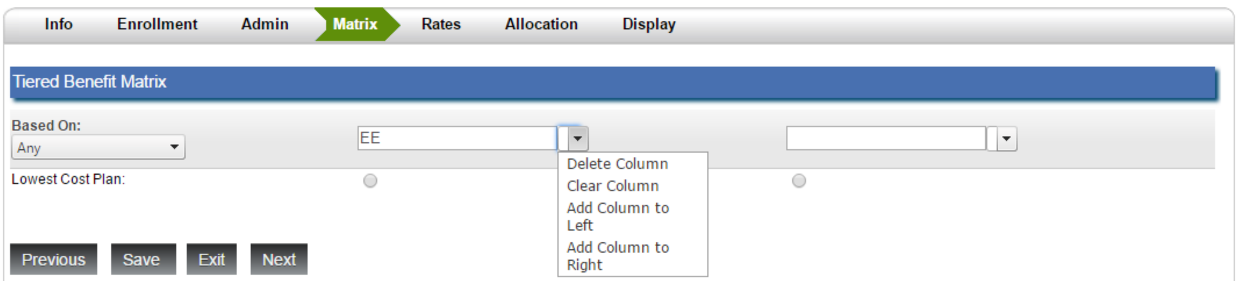
12. On the **Admin** page, select the information for the following fields:

Field Name	Definition
Internal Plan Administrator	Select the role of the individual who will be responsible for Benefits Administration.
Plan Carrier	The Benefit or Insurance Provider entered in the Default Table.
Plan Contributions remitted to	Will the Plan contributions be sent to the Carrier or a Third Party Administrator (TPA)?
Is there a Plan Wide Billing fee paid to the Carrier for this plan?	Select **Yes** if such a fee exists.
Do you have a Third Party Administrator for this plan?	Select **Yes** if this plan is being administered by a Third Party.
Do you have a PPO for this plan?	Select **Yes** if this is a PPO plan.



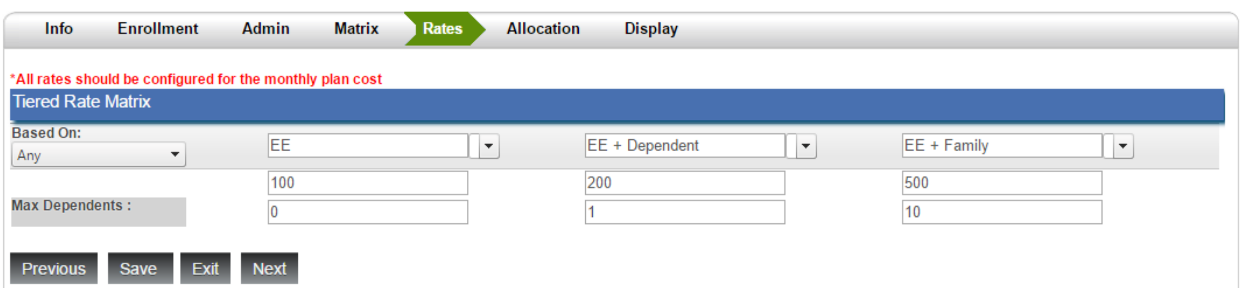
13. Click **Next** when complete.

14. On the **Matrix** tab, create the benefit Tiers for which rates will be defined.
    - First, define how the tiers will be based. In our example for Medical, we will choose **Any**.
        i. **Age** - Used for Age Banded Tiers.
        ii. **Employee Type** – Used for tiers that will be based on the type of employee.
        iii. **Employee Status** – Used when tiers will be based on the Status of the employee.
        iv. **Any** – Used when any employee may be considered.
    - Next, define the tiers. Commonly, for Medical, Dental, or Vision plans, this would be considered the Level of the plan. For example, Employee Only, Employee and Dependent, or Employee and Family.
    - The screen will display one plan column or tier by default, to add additional columns, click on the downward facing arrow next to the plan tier and select **Add Column to the Right** or **Add Column to the Left**.
    - Under the tier that will be used for ACA Affordability and Reporting, select the **Lowest Cost Plan**.



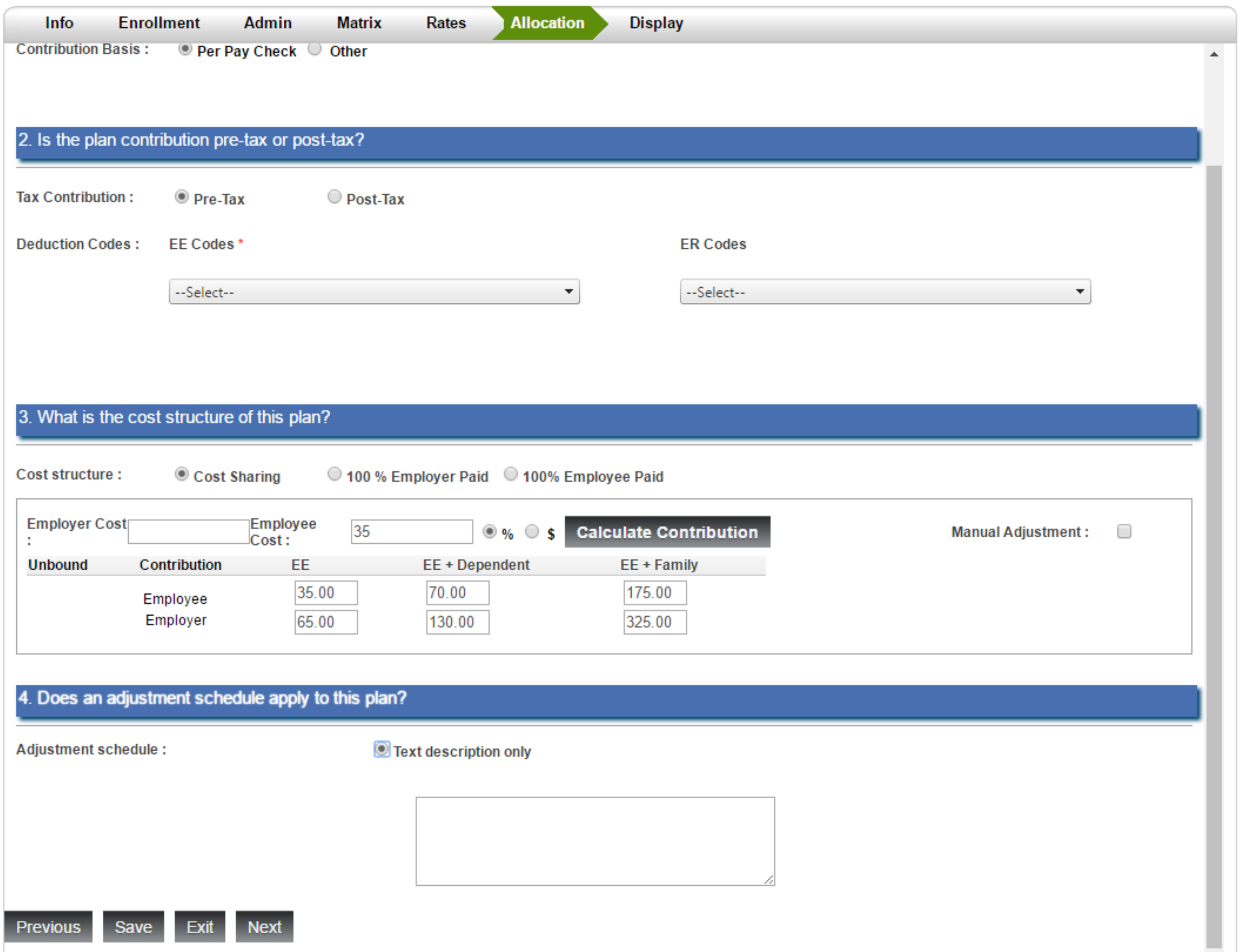
15. Click **Next** when complete.
16. On the **Rates** tab, enter the actual Monthly cost of each of the tiers. As well as the maximum number of dependents that will be allowed for each benefit.

    Dependents can only be assigned to tiers during enrollment if they are allowed on this screen. For EE only, enter **0** or leave blank. For a tier that is the Employee and one other dependent or spouse, enter **1**.

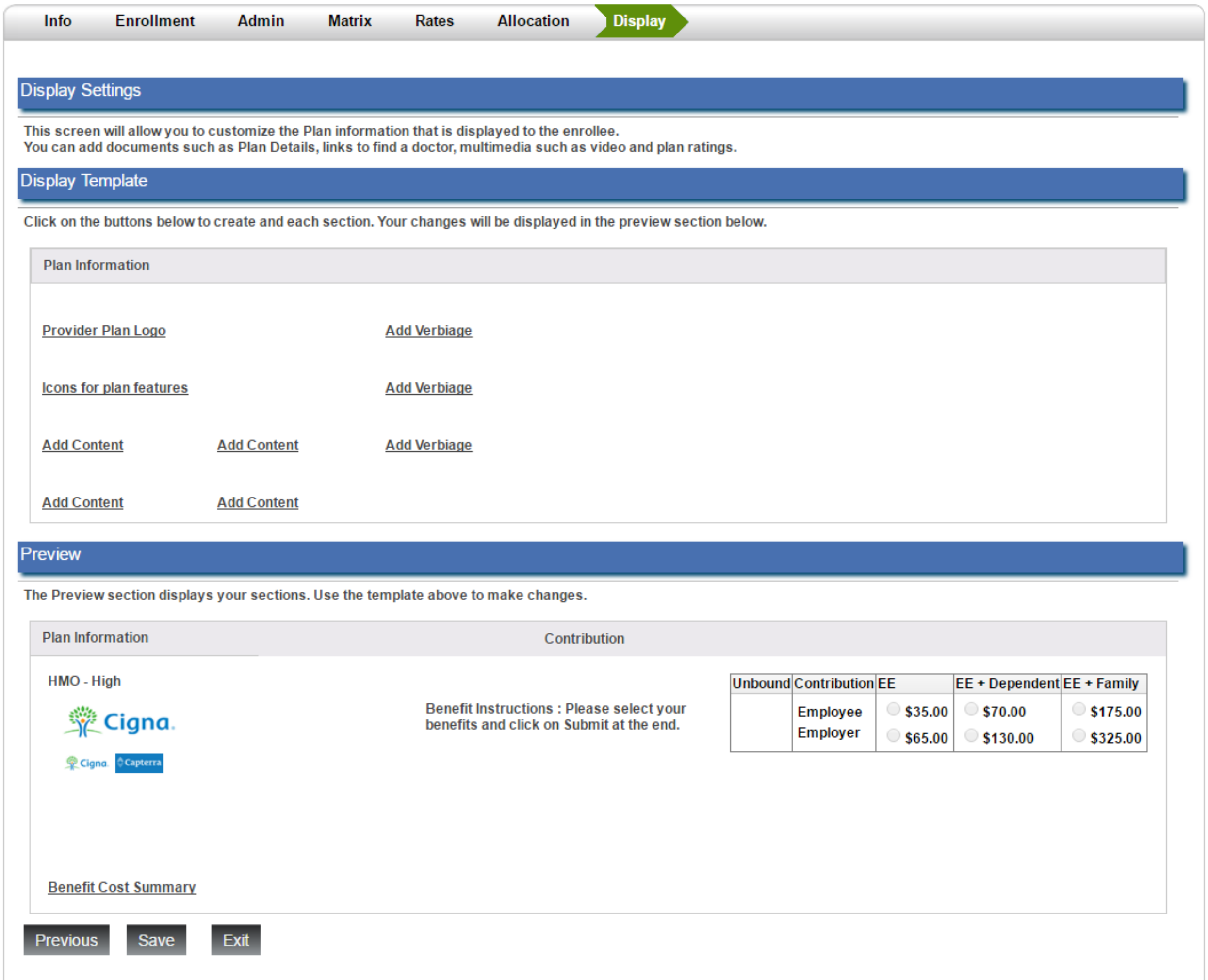


17. Click **Next** when complete.
18. On the **Allocation** tab, enter the allocation details.
    - **Contribution Basis** – If the cost of the benefit will be applied per paycheck, select this option. If it must be applied in a different frequency, select other, and then select the frequency.
    - **Tax Contribution**: Select if this is a Pre or Post tax benefit.
    - **Deduction Codes**: Select the Deduction Codes to be used for the Employee (EE) cost and the codes to be used for the Employer (ER) cost of the benefit.

- **Cost Structure**: If this benefit will be cost shared by the Employee and Employer, select **Cost Sharing**. If it is not, then select the option of whom should pay for the benefit.
    i. This is necessary to determine the Scheduled E/D that will be created when the employee enrolls in this benefit.
- To automatically determine the amount of cost sharing, enter the Percentage or Dollar amount into the Employer Cost OR the Employee Cost and click on **Calculate Contribution**. Advanced HR will automatically fill in the Employee and Employer shares based on this amount.
- To manually enter this information, click on the **Manual Adjustment** box and enter the amounts for each of the tiers.
- **Adjustment Schedule**: If an adjustment schedule exists for this benefit, select the **Text Description only** option and enter the Adjustment Text.



19. Click **Next** when complete.
20. The **Display** tab will allow you to configure how the Benefit option is displayed to the employee when they are going through open enrollment. You may add the following information.
    - Provider Plan Logo and Verbiage about the provider and plan.
    - Icons for Plan features if the plan has additional features such as discounted Gym Memberships or chiropractic and massage therapy services.
    - The ability to add content and display it during the enrollment process such as Video, URL, or Documents about the plan.



21. Click **Save** once completed.
22. Repeat these steps to configure all necessary Medical, Dental, or Vision plans.

401(k), HSA, FSA, and FSA Dependent Care Benefit Creation

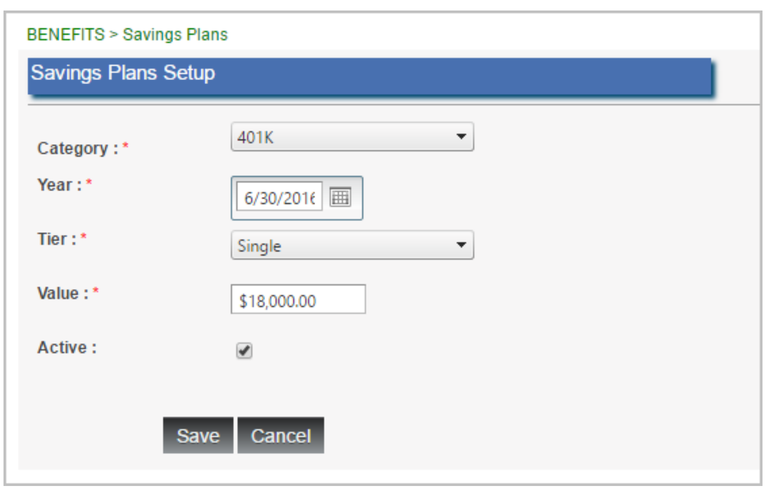
In Advanced HR, a 401(k), HSA, and FSA plans can be created for enrollment, however, a scheduled E/D would need to be manually created by the Administrator upon employee enrollment in these plans.

Note: Upcoming releases to Advanced HR will include functionality to automatically create a scheduled E/D when employees enroll in these plans.

Setup Information: Prior to creating a 401(k), HSA, FSA, or FSA Dependent care plans, the Plan years must be set up in the Default Table Setup (**Setup – Default Tables Setup – Benefits – Savings Plans**). The Plan Years are used to define the Date that the savings plans can begin as well as that year's maximum contribution value. Since contribution limits may change from year to year, it is recommended that these are set up in advance when the plan year limits are learned. You may need to create the Single Plan or Family Plans as well as a Catchup Plan Year. Once the plan year is created, you can create the benefit for open enrollment.

To create the Plan Year information:

1. Go to **Setup – Default Tables Setup – Benefits – Savings Plans**.
2. Click **Add**.
3. In the **Category** drop-down list, select the type of plan to create. Example - 401K.
4. In the year, select the start date of this plan year.
5. In the **Tier** drop-down list:
    - Select **Single** for the Single HSA or FSA plan or the standard 401(k) plan contribution.
    - Select **Family** for the Family HSA or FSA plans.
    - Select **Catchup** for the Catchup Plan contribution.
6. In the **Value** field, enter the maximum contribution for that plan year for that type of plan.
7. Select **Active**, to make this the active Contribution cap.
8. Click **Save** when completed.



Now that the plan year is present, we can create the benefit for open enrollment. In our example, we will use 401K, however the HSA and FSA plans are created in the same manner.

To create a 401(k) plan:

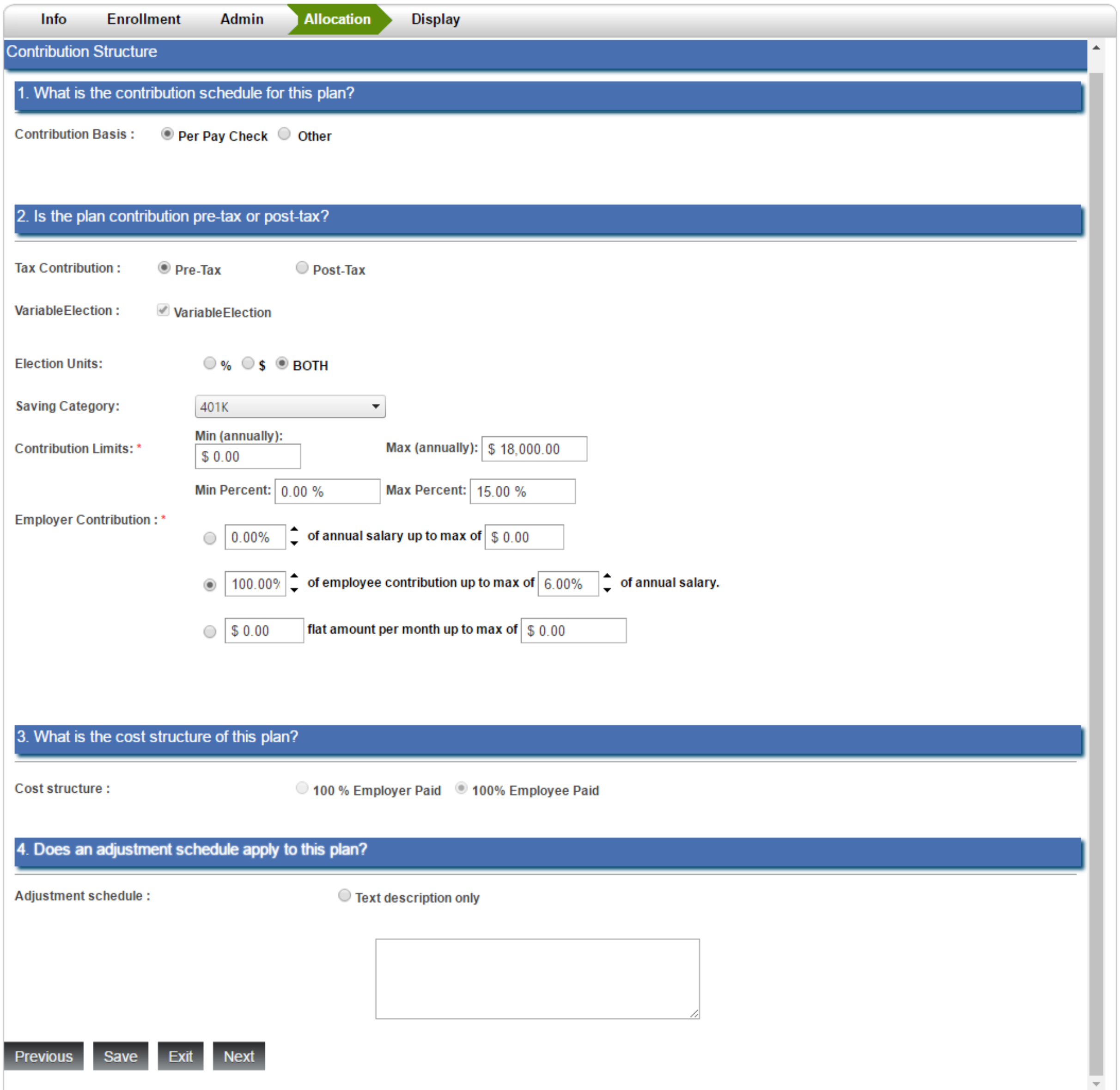
1. Go to **Administration – Benefits**.
2. Click on **Add**.
3. Select **401(k)** from the plan **Type** drop-down menu.
4. Enter the information on the **Info**, **Enrollment**, and **Admin** tabs.

Note: For additional information on these tabs, please review the *Creating Medical, Dental, and Vision Benefit Plans* section of this guide.

---

5. On the **Allocation** tab, select the following information

Field Name	Definition
Contribution Basis	Defaults to **Per Pay Check**. Select **Other** to change to a different frequency.
Tax Contribution	Defaults to Pre-Tax.
Variable Election	Selected. This field is Read Only for 401(k), HAS, and FSA plans.
Deduction Codes	Not present for 401(k) plans. Select EE and ER codes for HSA and FSA plans.
Election Units	Select if the employee can enter a percentage, a dollar amount, or either.
Saving Category	Select **401K** when creating a 401K Benefit plan.
Contribution Limits	Enter in the maximum annual amount or the maximum percentage. • When percentage is selected in the **Election Units** field, only a Min and Max Percent must be entered here. • When Dollar is selected in the **Election Units** field, only Min (annually) and Max (Annually) dollar amounts must be entered here. • When BOTH is selected in the **Election Units** field, both sets of Minimum and Maximum amounts must be entered.
Employer Contribution	Enter in the Employer Match, if any exists.
Cost Structure	100% Employee Paid is selected. This field is read only for 401(k), HSA, and FSA plans.
Adjustment Schedule	Enter text if there is an adjustment schedule.



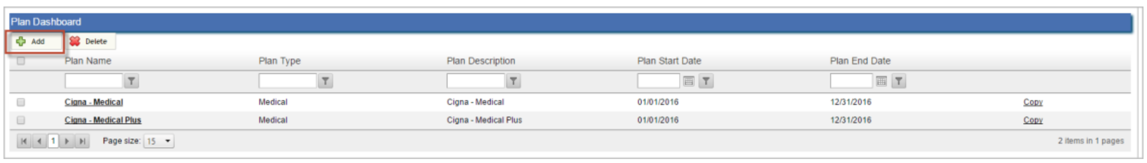
6. Click **Next** to continue.
7. On the **Display** tab, enter the information to display to the user during benefit enrollment.
8. Click on **Save and Exit** when completed.

Setting up a short term Disability Plan in Advanced HR

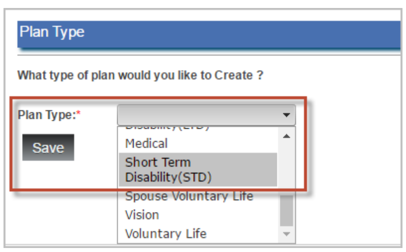
In Advanced HR, many types of benefits have very similar setup. For instance, Medical, Dental, and Vision Benefits utilize much of the same logic, and therefore, are set up very similarly. Short Term Disability plans also share some of the same setup steps. Refer back to the Medical/Dental section for more information on some of the following steps. This section concentrates on the differences in setting up a Short Term Disability plan.

To create a Short Term Disability plan:

1. Go to **Administration** – **Benefits**.
2. On the **Plan Dashboard**, click on the **Add** button.

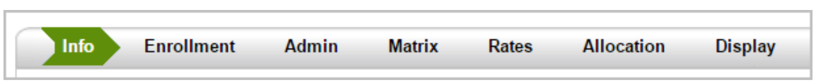


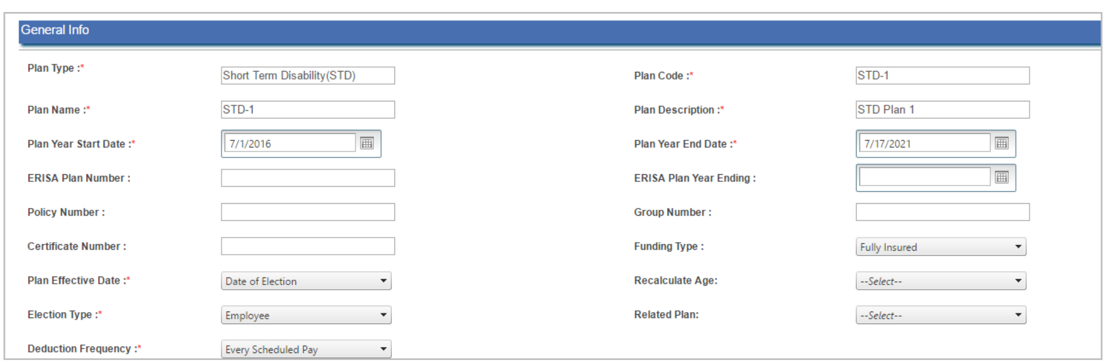
3. Select the **Plan Type** of **Short Term Disability** (**STD**).



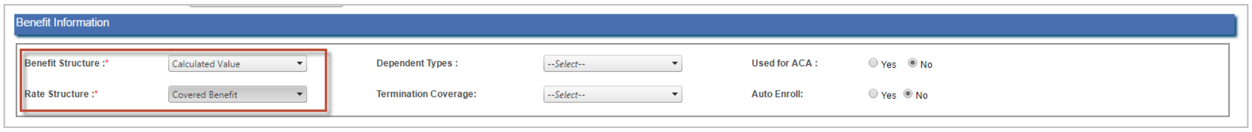
4. Click **Next**.

   Result: The system displays the Benefits setup menu **Info** tab, with the **General Info** section displaying.

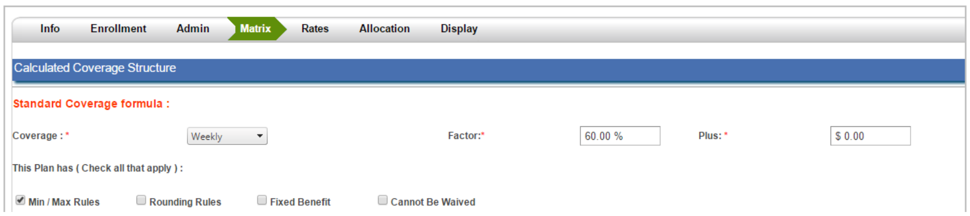


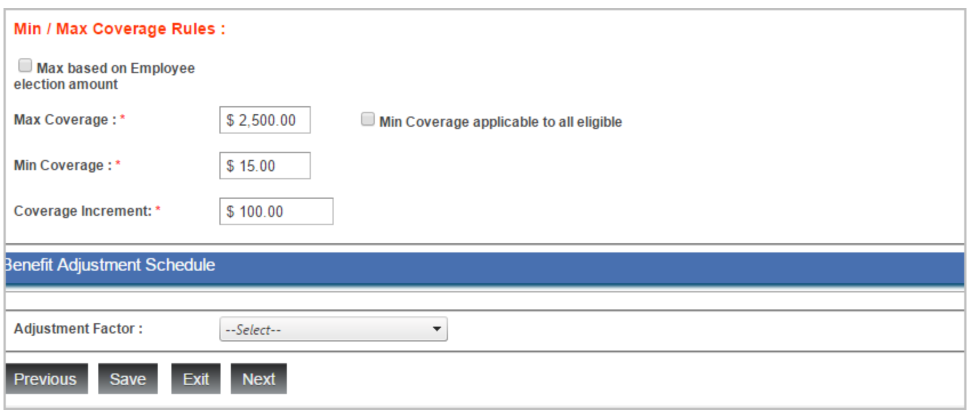


5. The **General Info** section information you enter is similar across all types of Benefit Plans.
6. In the **Benefit Information** section of the **Info** tab, for **Benefit Structure**, select **Calculated Value**, as STD plans generally pay out based on the employee's weekly salary.
   The **Cash Out Waiver** may be a rebate from the company if the STD is an employer funded benefit and if the employee opts out of the benefit.
   For **Rate Structure**, select **Covered Benefit**.

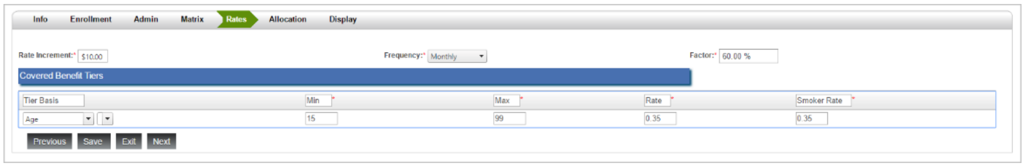


7. Click **Next** to move to the **Enrollment** tab.
8. The **Enrollment** and the **Admin** tabs are completed similarly as you do for all other Benefit Plans.
   - On the **Enrollment** tab, select if the benefit will require beneficiaries and the date of birth for the Dependents, Beneficiaries, both or none.
   - On the **Admin** page, complete the information about the internal plan administrator, plan carrier and other related plan info.
9. Click **Next** to move to the **Matrix** tab. Refer to your policy document to complete the information on the **Matrix** tab.

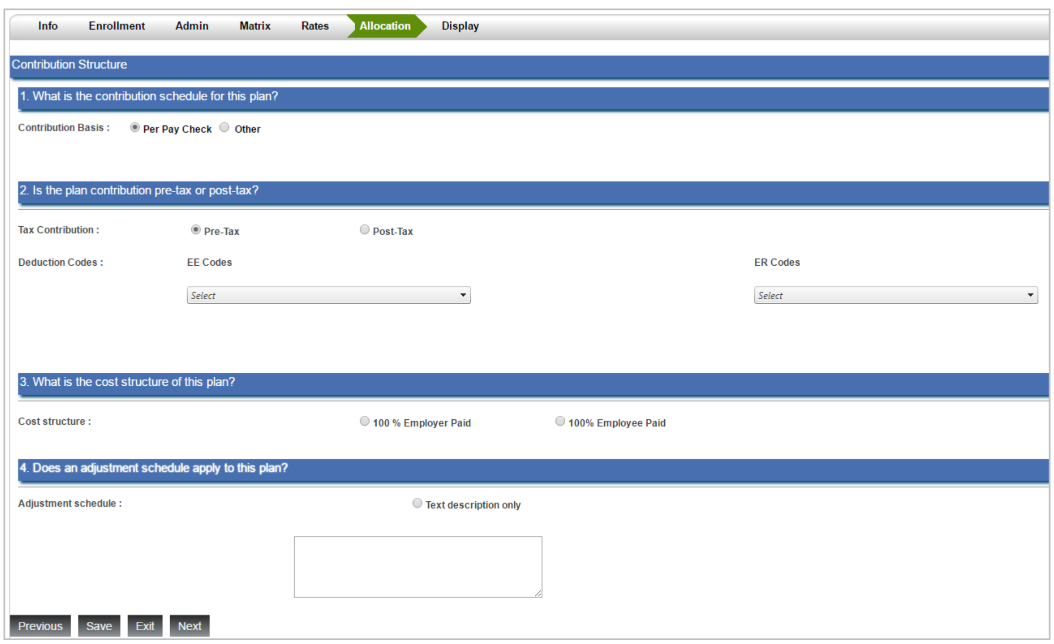




10. If the policy document specifies the benefit payout in weekly terms, then select **Weekly** from the **Coverage** dropdown field.
11. Enter the **Factor**. This is the benefit percentage given in your policy document. It is the percentage of the first stipulated amount of the employee's weekly insured pre-disability earnings, reduced by the deductible income.
12. Currently, the **Plus** field is required even though with STD, there might not be a value for this. Enter **0.01** to continue. Note this will be changed to become a non-required field in a future release.
13. Select the **Min/Max Rules** (and possibly **Rounding Rules**) options and/or **Cannot be Waived**.
14. In the **Min/Max Coverage Rules**, select the Max based on the Employee Election amount
15. Enter the plan maximum benefit (refer to policy document) into the **Max Coverage** field.
16. Enter the plan minimum benefit (refer to policy document) into the **Min Coverage** field.
17. Generally, there shouldn't be a **Coverage Increment** value for an STD plan, but enter a value as this is currently a required field. Note this will be changed to become a non-required field in a future release.
18. Click **Next** to go to the **Rates** tab.



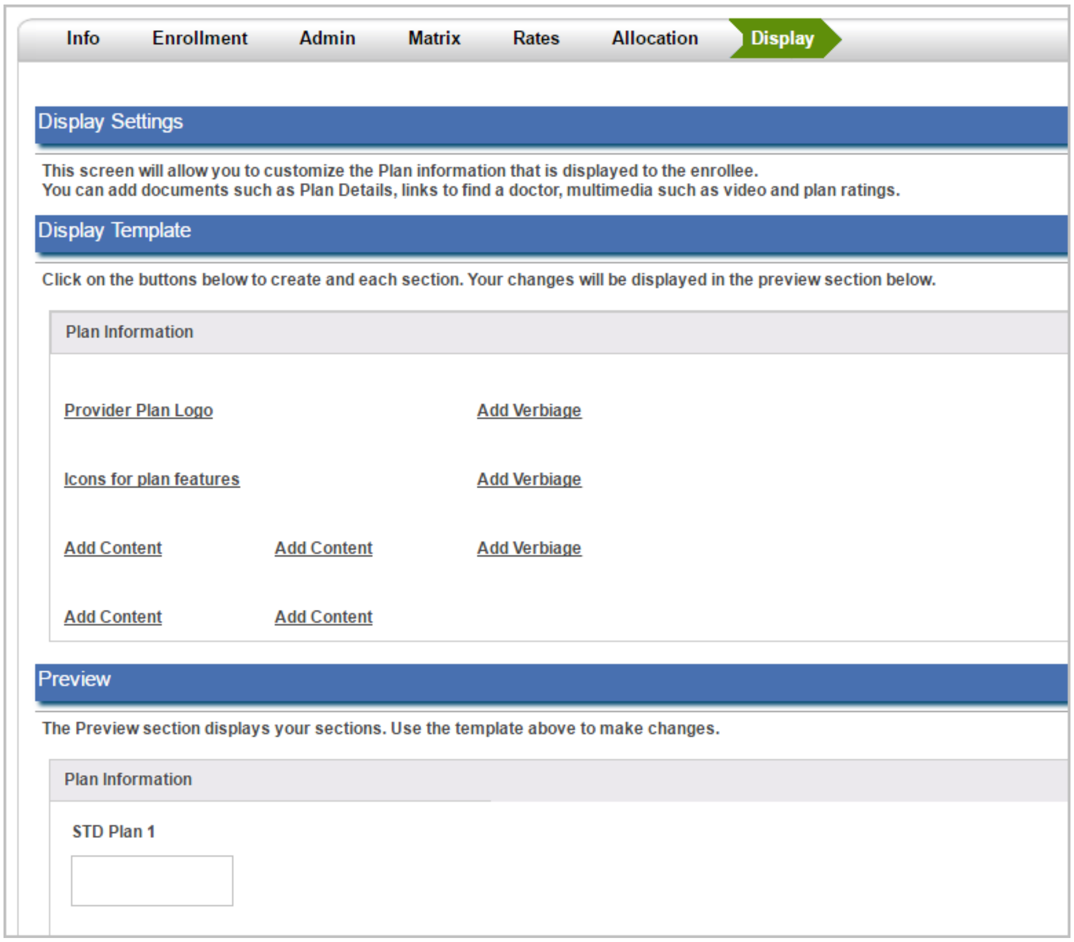
19. For **Rate Increment**, the LTD is generally expressed as per $10 of covered benefit so enter **10** into this text box. If the policy document stated otherwise, enter the value given in the document.
20. Generally a monthly cost is the common requirement to display to employees, so select **Monthly** from the **Frequency** drop-down field.
21. Enter the factor, which should be normally be **100%** unless the policy document states that this policy should only pay a percentage of the stated Rate.
22. Some STD rates are based on age range. If your STD is such, select age from the **Tier Basis** and enter the **Min** and **Max** age, along with the rate for this age range. The rate for Smoker might be different. If it is, enter the **Smoker Rate** (refer to your policy document). If it is not mentioned, it should probably be the same. If you have additional age range, click on the drop-down next to the **Age** drop-down and select **Add Row Below**. Enter the Min, Max, Rate and Smoker Rate for this age range.
23. Click **Next** to go to the **Allocation** tab.



24. On the **Allocation** tab, enter the following allocation details.
    - **Contribution Basis** – If the cost of the benefit will be applied per paycheck, select this option. If it must be applied in a different frequency, select **Other**, and then select the frequency.
    - **Tax Contribution**: Select if this is a **Pre** or **Post tax** benefit.
    - **Deduction Codes**: Select the Deduction Codes to be used for the **Employee** (**EE**) cost and the codes to be used for the **Employer** (**ER**) cost of the benefit.
    - **Cost Structure**: If this benefit will be cost shared by the Employee and Employer, select **Cost Sharing**. If it is not, then select the option of whom should pay for the benefit.
        - This is necessary to determine the Scheduled E/D that will be created when the employee enrolls in this benefit.

- To automatically determine the amount of cost sharing, enter the **Percentage** or **Dollar amount** into the **Employer Cost** OR the **Employee Cost** and click on **Calculate Contribution**. Advanced HR will automatically fill in the Employee and Employer shares based on this amount.
- To manually enter this information, click on the **Manual Adjustment** box and enter the amounts for each of the tiers.
- **Adjustment Schedule**: If an adjustment schedule exists for this benefit, select the **Text Description** only option and enter the **Adjustment Text**.

25. Click **Next** to move to the **Display** tab.



The **Display** tab will allow you to configure how the Benefit option is displayed to the employee when they are going through open enrollment. You may add the following information:

- Provider Plan Logo and Verbiage about the provider and plan.
- Icons for Plan features if the plan has additional features such as discounted Gym Memberships or chiropractic and massage therapy services.
- The ability to add content and display it during the enrollment process such as Video, URL, or Documents about the plan.

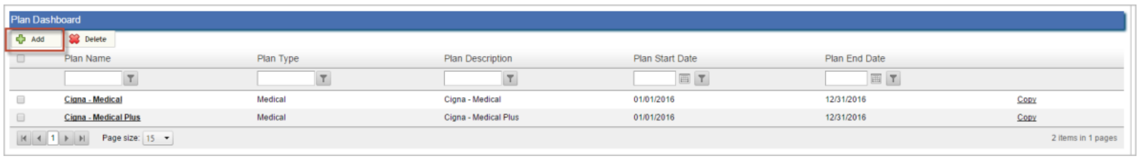
26. Click **Save** once you have finished entering all the Short Term Disability Plan information.

Setting up a long term Disability Plan in Advanced HR

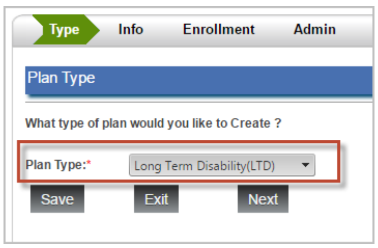
In Advanced HR, many types of benefits have very similar setup. For instance, Medical, Dental, and Vision Benefits utilize much of the same logic, and therefore, are set up very similarly. Long Term Disability plans also share some of the same setup steps. Refer back to the Medical/Dental section for more information on some of the following steps. This section concentrates on the differences in setting up a long Term Disability plan.

To set up a Long Term Disability plan:

1. Go to **Administration** – **Benefits**.
2. On the **Plan Dashboard**, click on the **Add** button.

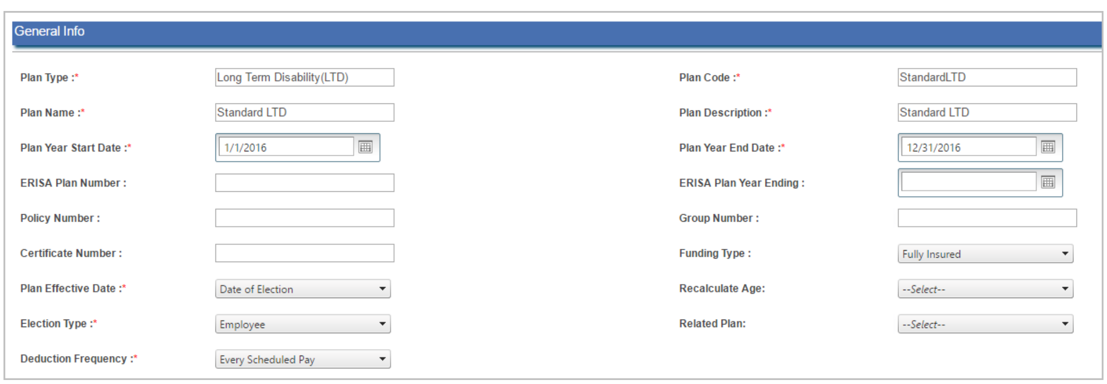


3. Select the **Plan Type** of **Long Term Disability** (**LTD**).

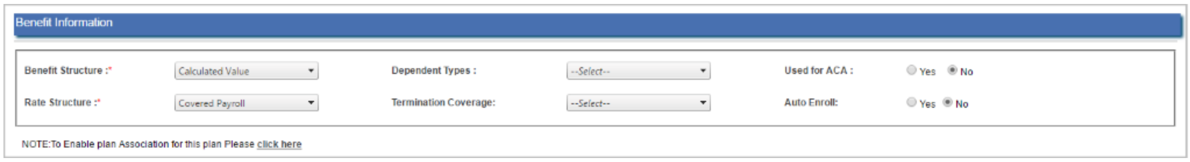


4. Click **Next**.

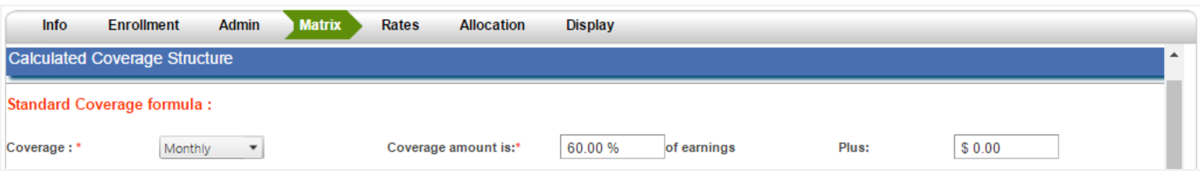
   Result: The system displays the Benefits setup menu **Info** tab, with the **General Info** section displaying.



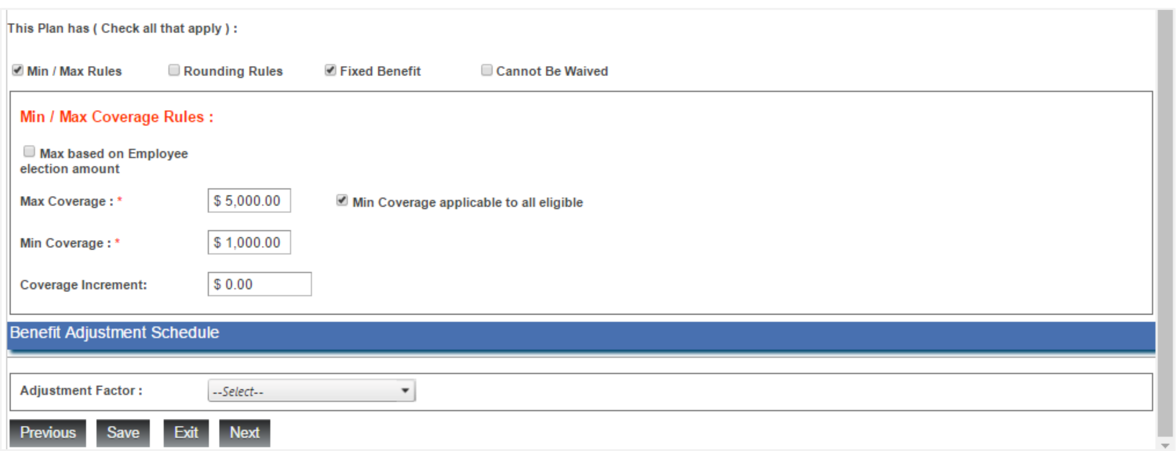
5. In the **General Info** section, enter the relevant information into the fields.
6. In the **Benefit Information** section of the **Info** tab, for **Benefit Structure**, select **Calculated Value**, as LTD plans generally pay out based on the employee's monthly salary. Note that the **Cash Out Waiver** option may be a rebate from the company if the LTD is an employer funded benefit and if the employee opts out of the benefit. In the **Rate Structure** field, select the **Covered Payroll** option.



7. Click **Next** to move to the **Enrollment** tab. Click **Next** to move to the **Enrollment** tab.
8. On the **Enrollment** tab, select if the benefit will require beneficiaries and the date of birth for the Dependents, Beneficiaries, both or none.
9. On the **Admin** page, complete the information about the internal plan administrator, plan carrier and other related plan information.
10. Click **Next** to move to the **Matrix** tab.

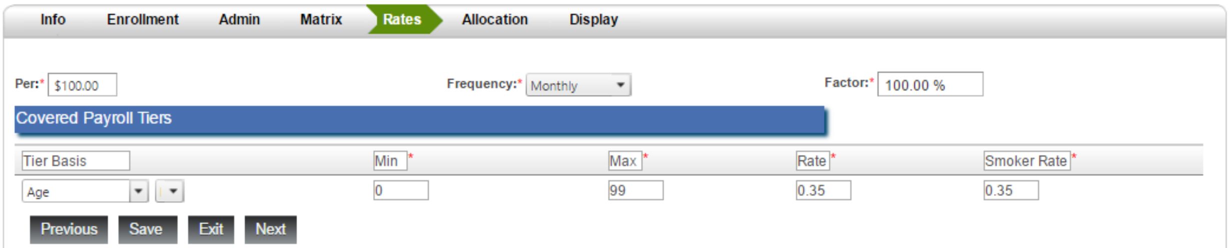


11. The above screen shows the portion of the **Matrix** tab that sets the coverage amount of the LTD. In general, LTD coverage amount is based on a percentage of the employee's monthly salary (please refer to your policy document to ensure that such is the case). Select **Monthly** from the **Coverage** dropdown and enter the percentage into the **Coverage amount is ___ of earnings** field.



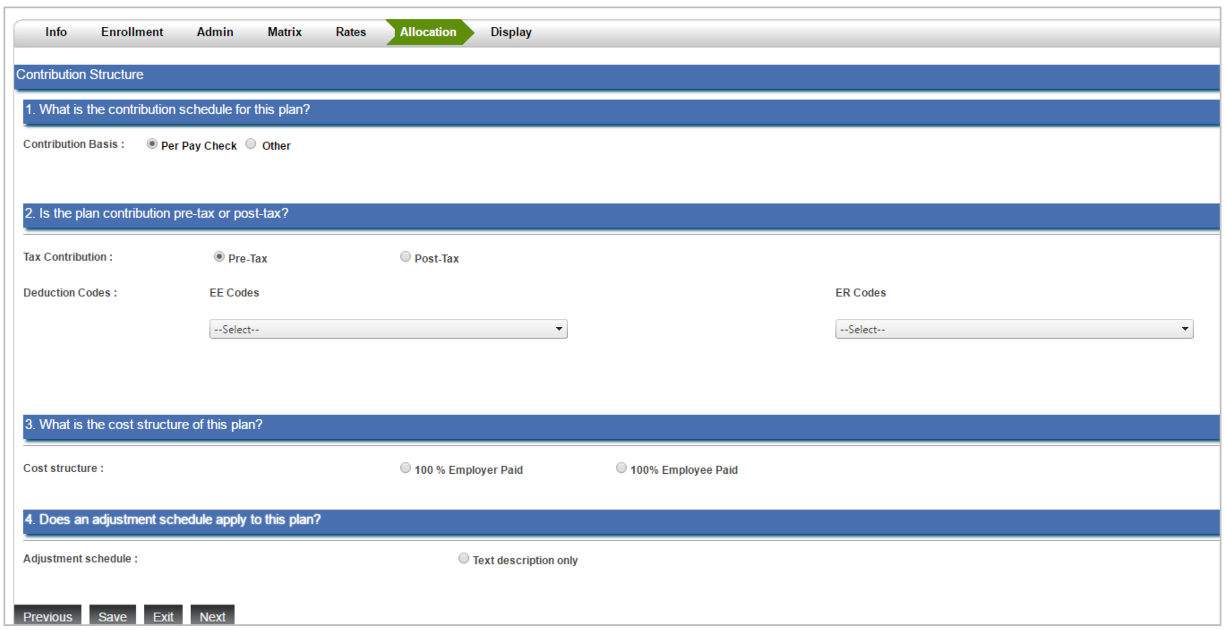
12. The above screen shows the portion of the **Matrix** tab that sets limits. As an LTD policy would generally set a maximum coverage amount (and sometimes a minimum), select the **Min/Max Rules** check box.
13. With an LTD policy, the coverage amount is generally fixed (that is, a percentage of their monthly salary, not exceeding the maximum coverage amount), which means that employee will not be able to select a different coverage amount. Select the **Fixed Benefit** check box.
14. Select the **Min Coverage applicable to all eligible** check box, if there is a minimum coverage amount.
15. Enter the plan maximum benefit (refer to policy document) into the **Max Coverage** field.
16. Enter the plan minimum benefit (refer to policy document) into the **Min Coverage** field, if applicable.
17. Click **Next** to go to the **Rates** tab.

The **Rates** tab allows you to set up how the rates of the LTD are calculated.



18. The rate for the LTD is generally calculated based on a given rate per $100 (refer to the policy, if not stated, then $100 should be used). Enter **100** into the **Per** field.
19. In general, AHR calculates rates in monthly term. Select **Monthly** from the **Frequency** drop-down field.
20. Enter the **Factor**, which should normally be 100% unless the policy document states that this policy should only pay a percentage of the stated rate.

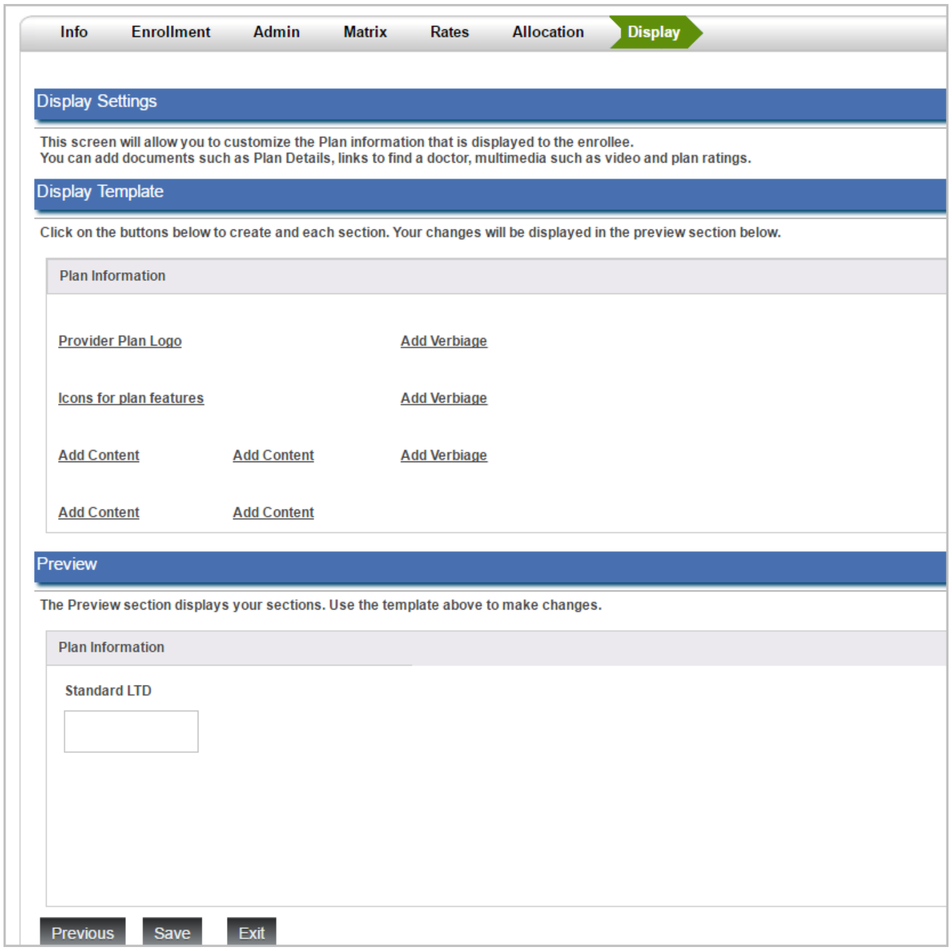
    Some LTD rates are based on age range. If your LTD is such, select age from the **Tier Basis** and enter the Min and Max age, along with the rate for this age range. The rate for a Smoker might be different. If it is, enter the **Smoker Rate** (refer to your policy document). If it is not mentioned, it should probably be the same. If you have additional age ranges, click on the **Age** dropdown and select **Add Row Below**. Enter the **Min**, **Max**, **Rate** and **Smoker Rate** for this age range.
21. Click **Next** to go to the **Allocation** tab.



22. On the **Allocation** tab, enter the following allocation details.
    - **Contribution Basis** – If the cost of the benefit will be applied per paycheck, select this option. If it must be applied in a different frequency, select **Other**, and then select the frequency.
    - **Tax Contribution**: Select if this is a **Pre** or **Post tax** benefit; in general, LTD is Post-Tax.
    - **Deduction Codes**: Select the Deduction Codes to be used for the **Employee** (**EE**) cost and the codes to be used for the **Employer** (**ER**) cost of the benefit.
    - **Cost Structure**: select an appropriate Cost Structure.
23. Click **Next** to move to the **Display** tab.

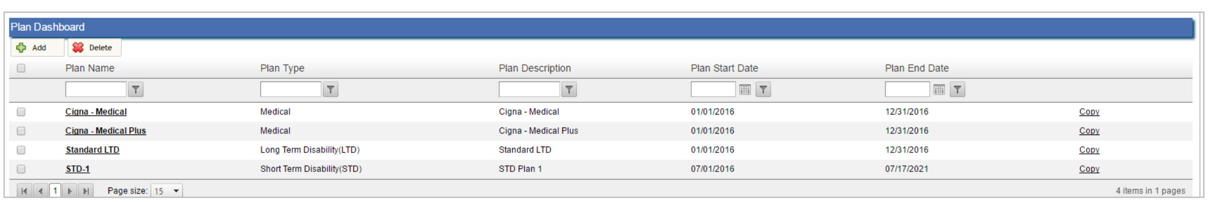
The **Display** tab will allow you to configure how the Benefit option is displayed to the employee when they are going through open enrollment. You may add the following information:

- Provider Plan Logo and Verbiage about the provider and plan.
- Icons for Plan features if the plan has additional features.
- The ability to add content and display it during the enrollment process such as Video, URL, or Documents about the plan.



24. Click **Save** once you have finished entering all the Long Term Disability Plan information.
25. Click **Exit**.

The system returns you to the Plan Dashboard screen showing the plan you just created.



Plan Dashboard

Add Delete

Plan Name	Plan Type	Plan Description	Plan Start Date	Plan End Date	
Cigna - Medical	Medical	Cigna - Medical	01/01/2016	12/31/2016	Copy
Cigna - Medical Plus	Medical	Cigna - Medical Plus	01/01/2016	12/31/2016	Copy
Standard LTD	Long Term Disability(LTD)	Standard LTD	01/01/2016	12/31/2016	Copy
STD-1	Short Term Disability(STD)	STD Plan 1	07/01/2016	07/17/2021	Copy

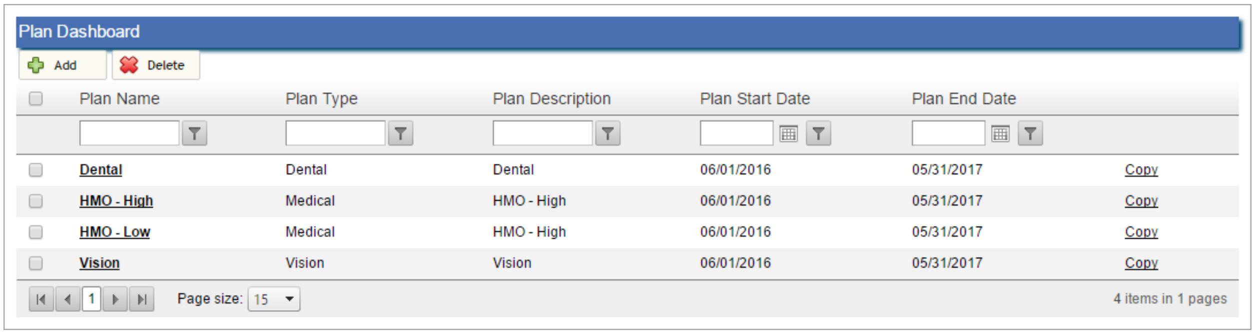
Page size: 15 — 4 items in 1 pages

Copying a benefit

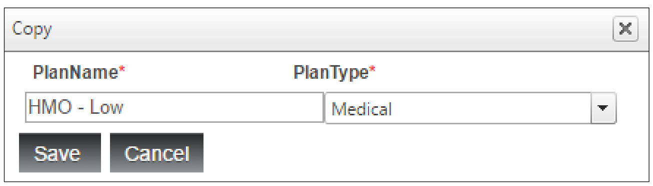
Advanced HR allows users to copy a benefit to save time when entering multiple benefits that are similar.

To copy a benefit:

1. On the **Administration – Benefits** screen, click on **Copy** next to the benefit you want to copy.



2. Enter in the name and the plan type.



3. Click on **Save**.
4. Click on the Copied Plan Name to edit any specific information about the plan.

Note: iSystems recommends reviewing each screen to ensure that the benefit plan is accurate.

Setting enrollment

There are three (3) types of enrollment that may occur in Advanced HR. These are:

- Open Enrollment
- New Hire Enrollment
- Life Status Change Enrollment

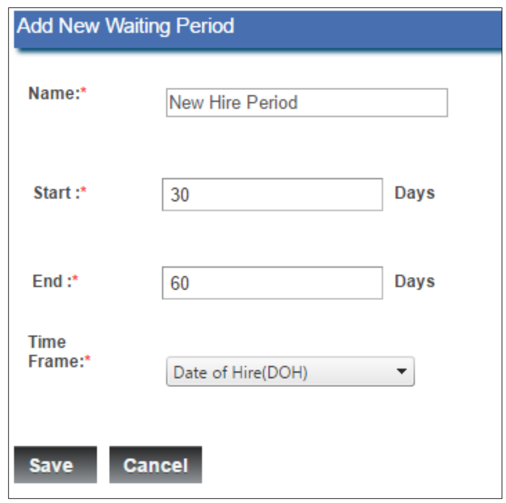
In this section, you will learn how to configure Advanced HR for these types of Enrollment.

The first step in using Advanced HR for benefit enrollment is to set up Waiting Periods, Eligibility Groups, and Benefit Classes.

Waiting Periods are typically used for New Hire enrollment, to allow for the company to offer a benefit to begin after a certain period of time from the employees Date of Hire, however these can be assigned to different periods as well.

The Eligibility Group, and the Benefit Class work together to allow only employees who meet the criteria of the Eligibility Group, and are assigned to a Benefit Class, the ability to enroll in their specific available benefits.

Waiting Period



To create the Waiting Period:

1. Go to **Administration – Waiting Periods**.
2. Click on **Add**.
3. Enter the following information:
    - **Name** – Enter a name for this Waiting Period.
    - **Start** – Enter the number of days after the Time Frame to begin Enrollment.
    - **End** – Enter the number of days after the Time Frame to end Enrollment.
    - **Time Frame** – Select **Date of Hire**. This is the time frame from which the Start and End days will be counted.

Setup Information: Additional Time frames can be added in Setup – Default Table Setup – Benefits – TimeFrame.

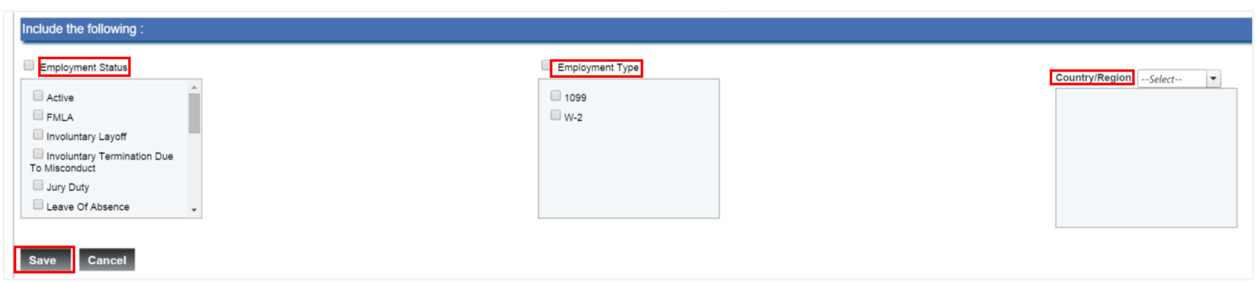
4. Click **Save** when complete.

Eligibility Group

To set up an Eligibility Group:

1. Go to **Administration – Eligibility Groups**.
2. Click on **Add**.
3. Enter the **Name** of the Eligibility Group.
4. In **Eligibility Criteria**, you can define specific information about what qualifies an employee assigned to this group.
    - You may define a Hire Date range.
    - Age Range.
    - Hours Worked.
    - If smokers will be included.

5. In the next section, select additional criteria for eligible employees.
    - Employment Status
    - Employment Type
    - And the Country or Region

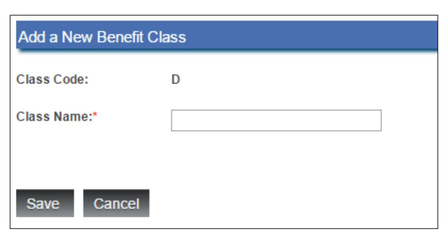


6. Click **Save** when complete.

Benefit Class

Next, the Benefit Class must be created. To create the Benefit Class(es):

1. Go to **Administration – Benefit Classes**.
2. Click the **Add** button.
3. Enter the **Class Name**.
    a. Example – Full Time Employees, Executive, Part Time, etc.…
4. Click **Save** when complete.



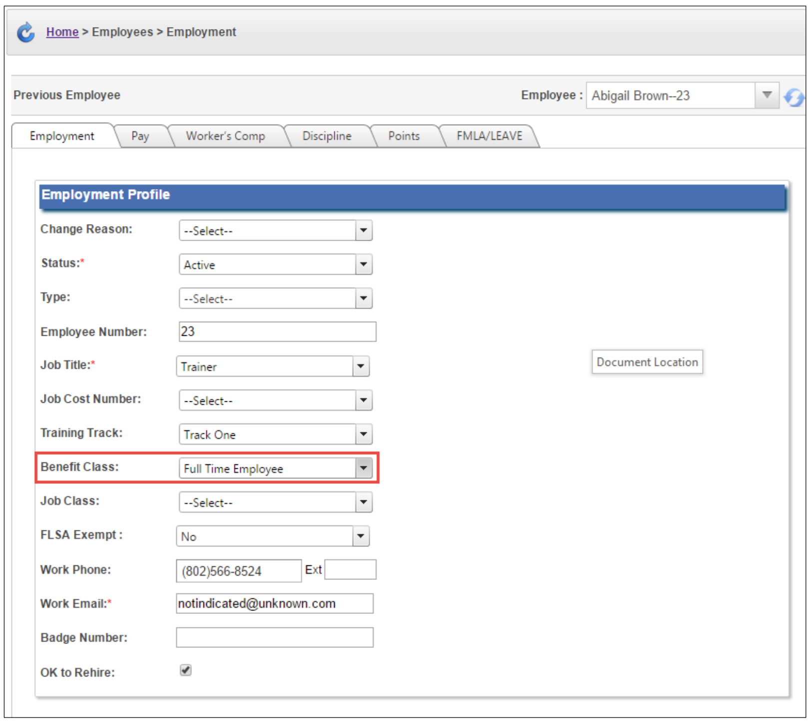
Note: Separate Benefit Classes should be set up for General Open Enrollment and for New Hire Enrollment.

Employee assignment

Now that the Waiting Periods, Eligibility Groups, and Benefit Classes are set up, the Benefit Class must be assigned to the Employees to prepare for Open Enrollment and/or New Hire Enrollment.

In Advanced HR, if the company is NOT Position Enabled, then to assign the Benefit Class:

1. Go to the **Employees – Employment** tab.
2. Select the **Benefit Class** from the drop-down list in the Employment Profile Form.
3. Click **Save** to continue.



If the Company IS Position Enabled, the Benefit Class is assigned to the Compensation Profile. To assign the Benefit Class to the Compensation Profile:

1. Go to **Administration – Compensation Profiles**.
2. In the **Action** column for the profile, click on **Edit**.

Positions: Compensation Profile

Add

S.No	Title	Wage Type	Wage Unit	Wage Amount	Commissions	Bonus	Benefit Group	Stock	Other Cash Comp	PTO Plan	Other Benefits	Action
1	Administrative Assistant		Year	$45,000.00	$0.00	$0.00	Full Time Employee		1200.00	Full Time Employee		
2	Farm Hand		Hour	$25.00	$0.00	$0.00	Full Time Employee		0.00			

Page size: 5 — 2 items in 1 pages

3. In the **Variable Plan** section, assign the **Benefit Group** (Benefit Class).
4. Click **Save** to continue.

Open Enrollment and New Hire Enrollment

Open Enrollment typically happens in companies 1 – 2 times per year, depending on the Benefit Structure. When Open Enrollment occurs, Employees who are eligible to receive benefits can log into the Employee Portal and select and/or waive benefits while enrollment is occurring. This eligibility is based on the Eligibility Groups and Benefit Classes that were set up and assigned to the employees in the previous section of this chapter.

New Hire Enrollment can happen at any point when new employees are hired into the company. Waiting Periods are set up and defined to allow Companies to have Enrollment happen after a certain period of time has passed from when the employee was hired.

Open Enrollment and New Hire Enrollment can be set up for one or multiple Benefit Classes to run at the same time. Prior to Open Enrollment being set up, the following requirements must be met:

1. Benefit Plans must be created.
2. Waiting Periods must be defined.
3. Eligibility Groups must be created.
4. Benefit Classes must be created and assigned to Employees or, if Position Enabled, the Compensation Profiles.

Note: Separate Benefit Classes can be created for separate Employee Types. For example, if the Executive level employees are offered a different set of benefits, create a Benefit Class specific to those employees.

Once all of the requirements have been completed, you are ready to begin setting up an Open Enrollment Period.

To set up the Open Enrollment period:

1. Go to **Administration – Benefits – Benefit Classes**.
2. Click on the name of the **Benefit Class** for which Open Enrollment will be set.
3. Click on the Orange Plus sign to Add a new Open Enrollment Period.
4. Enter a **Name** for this Open Enrollment Period.
5. Enter the **Start** and **End date** of the Open Enrollment Period.

   Note: These are the dates that Enrollment will be open and employees will be able to Enroll. For New Hire enrollment, this could be the entire Plan Year.
6. Select the **New Hire** option if this Enrollment Period is being set up for New Hire Enrollment.

Note: Do not select the New Hire option for General Open Enrollment. Separate Enrollment Periods should be set up for New Hire Enrollment.

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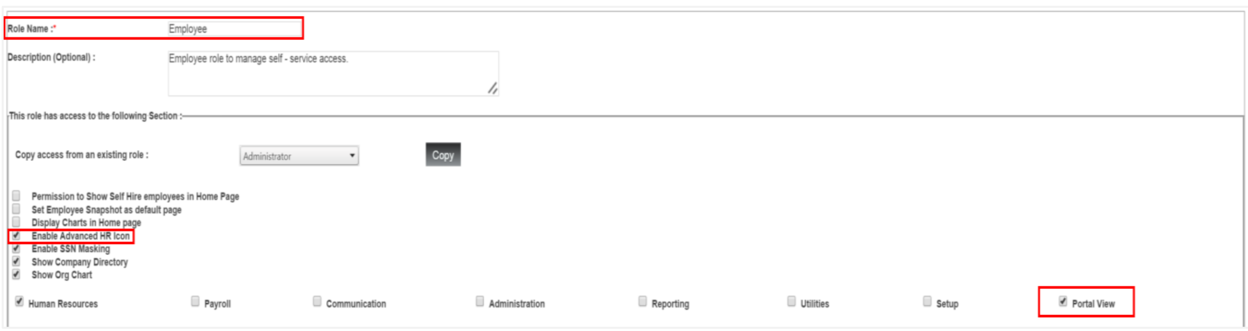
7. Click **Save** when complete.

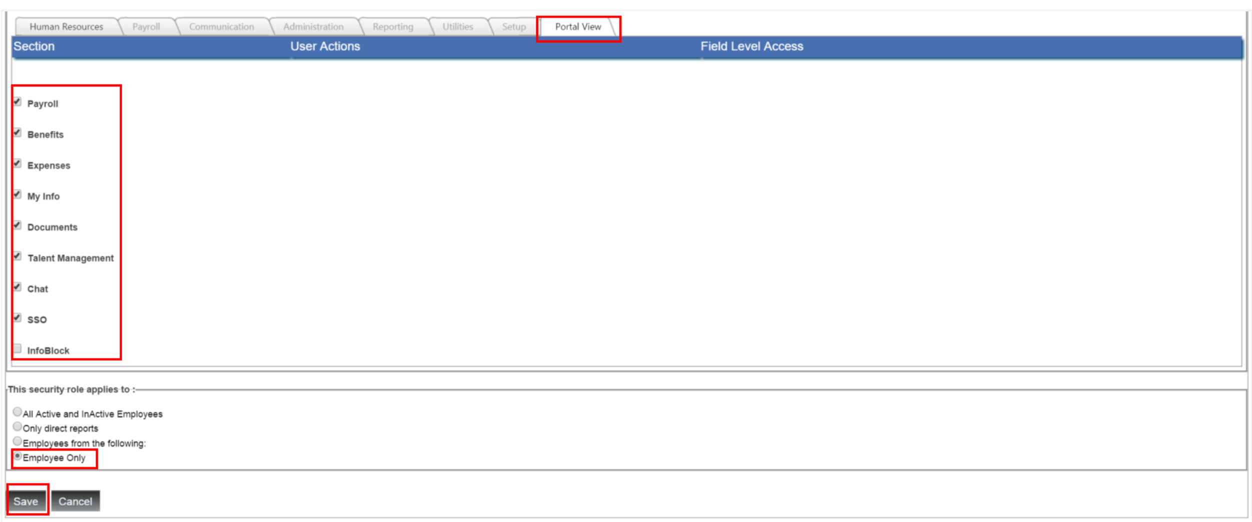
Result: Open Enrollment Period is saved. The User can now add Benefit Plans to the Open Enrollment Period.

8. Click on the Blue Plus sign to Add a New Plan.
9. Select the Plan Name, Eligibility Group, and Waiting Period for this plan.
10. Click on **Save**.
11. Repeat steps 7-9 until all plans that should be available during this enrollment are listed.
12. Repeat steps for All Benefit Classes that require Enrollment Periods.

Enrolling employees using the Employee Portal

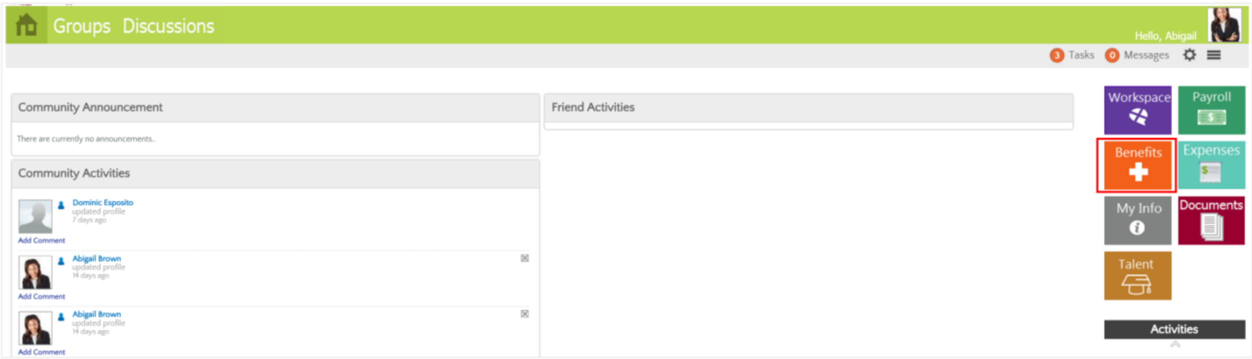
Employees have the ability to enroll in Benefit Plans directly from their Employee Portal site. It is important, however, to verify that the **Employee Role** within the company allows for this. From the **Setup – Security – Manage Roles** screen, define the buttons that appear on the **Employee Portal** from the **Portal View** tab.



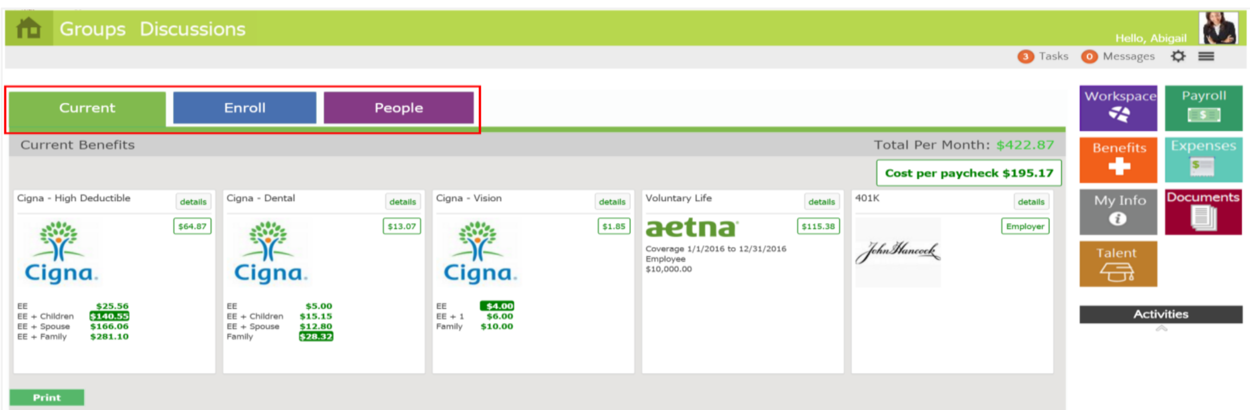


Once the desired buttons are activated for the role, click **Save**.

Logging into the Employee Portal, the user should notice that the tiles along the right side of the screen correspond with the buttons that were selected in the **Setup – Security – Manage Roles** screen.

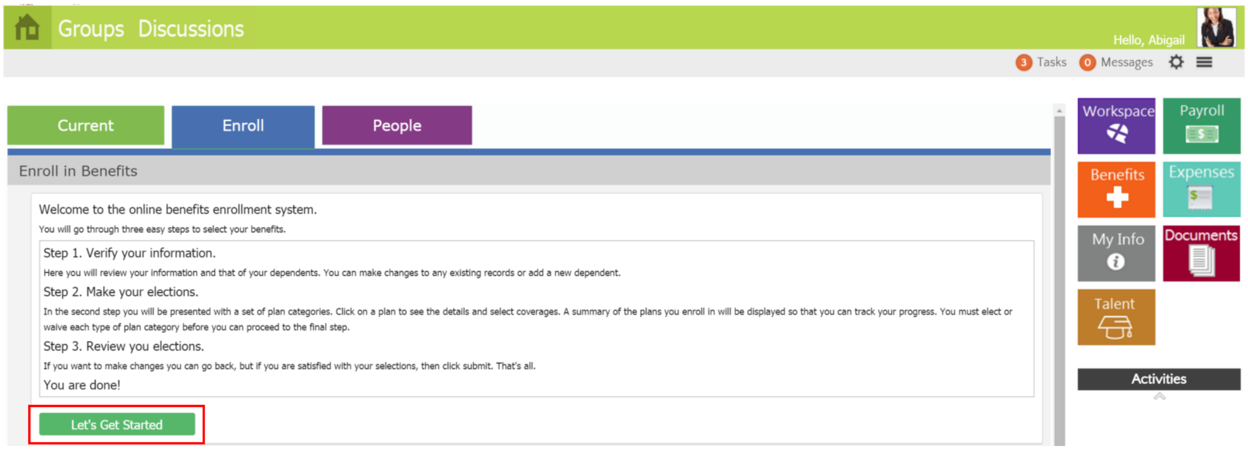


Clicking on the **Benefits** tile, the employee will be taken to the **Current Benefits** screen. Current Benefits, Enrolling in Benefits, and People (Dependents/Beneficiaries) are all accessible from this screen.

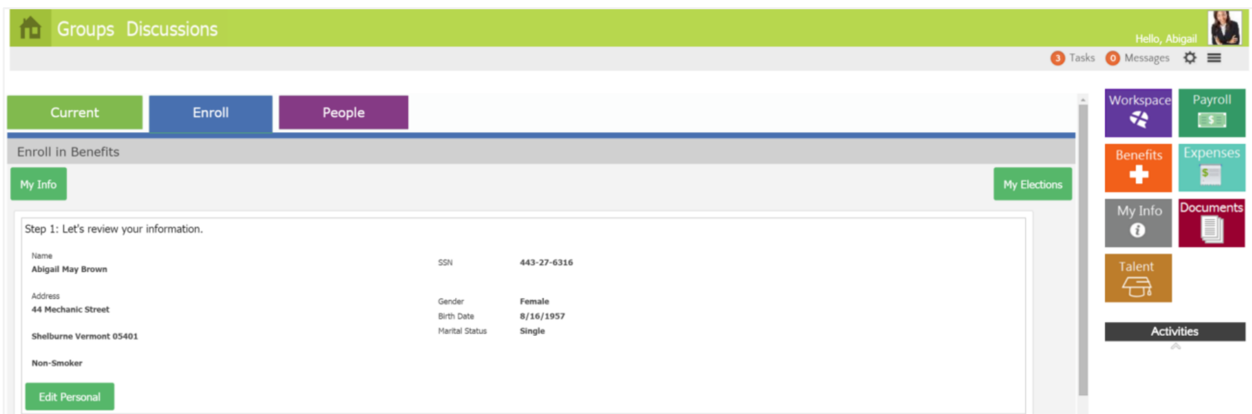


Selecting the **Enroll** tab, the user is taken to the **Enroll in Benefits** screen. The employee can select **New Hire Enrollment**, **Life Status Change**, or **Open Enrollment**. Clicking on the **Open Enrollment** link, the user is taken to the Benefits Enrollment Wizard. This wizard is very similar to what was seen in previous steps.

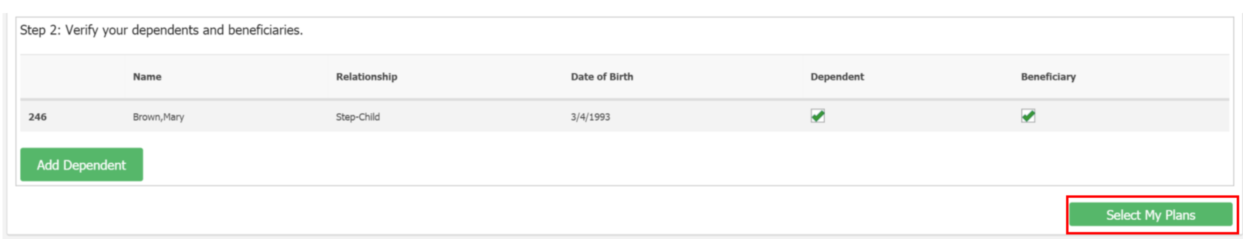
The Benefits Enrollment Wizard will walk the employee through the enrollment process. Clicking **Let's Get Started** will start the enrollment process. In this example, we will use a Cigna High Deductible Medical Plan:



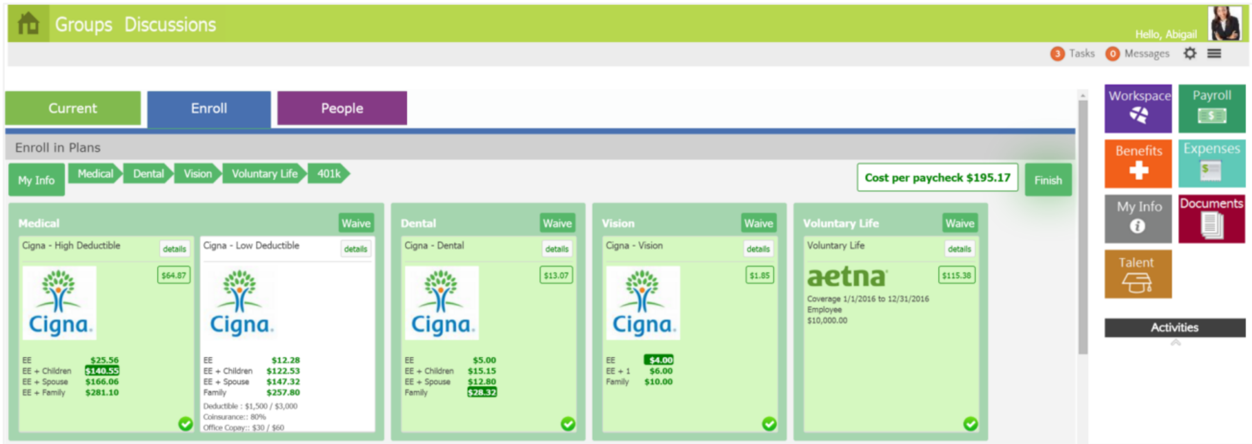
1. Verify and or edit information:



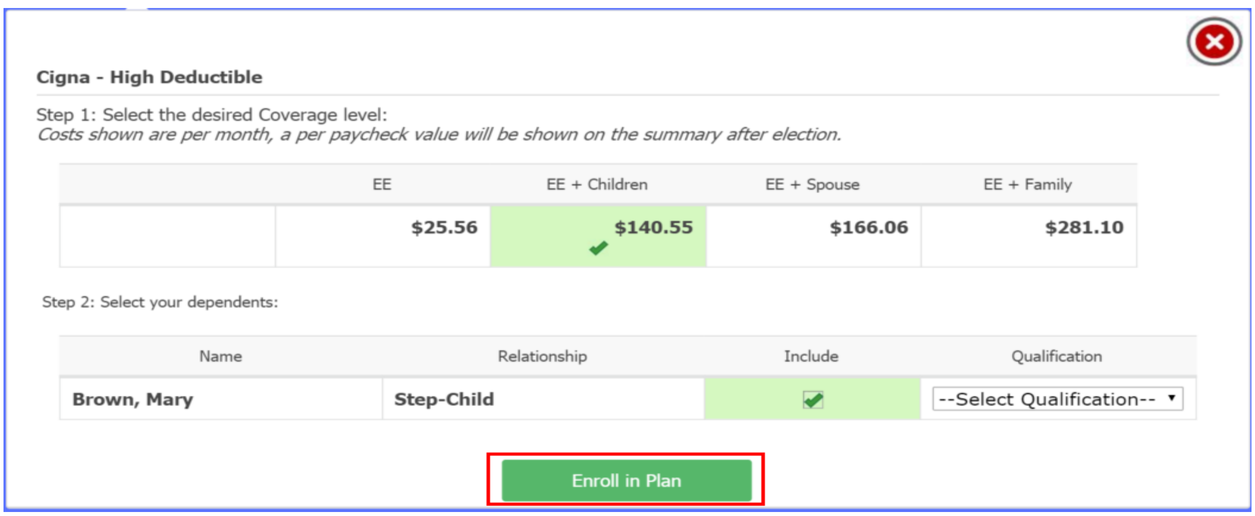
2. Verify and/or edit dependents and beneficiaries:



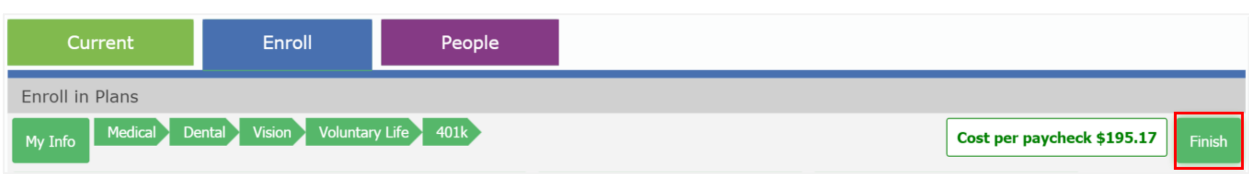
3. Click **Select My Plans.** The **Enroll in Plans** screen opens to show the different benefit options for the employee:



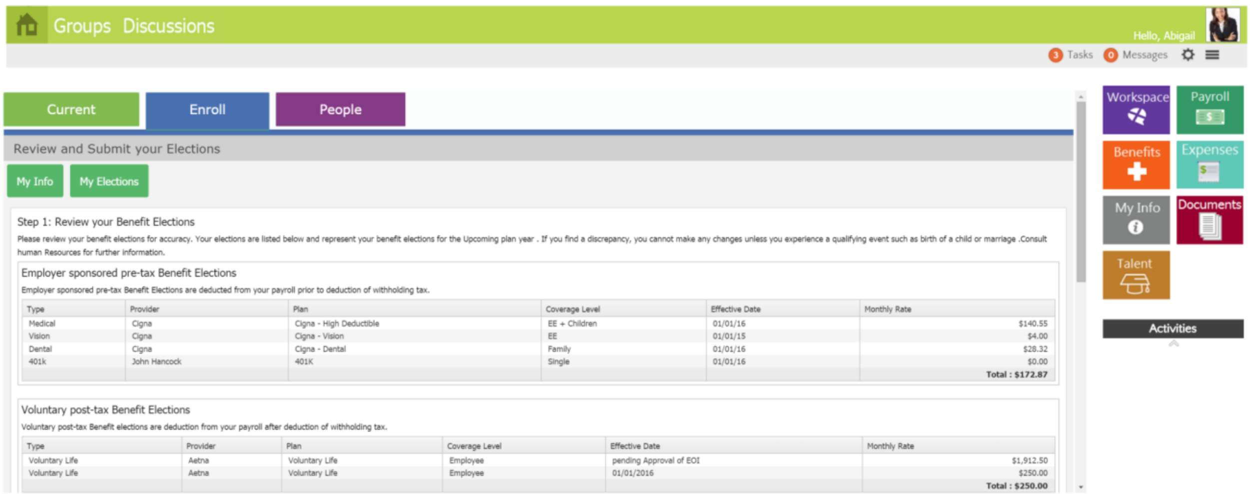
4. Selecting a desired plan and coverage level will give a summary of the election:

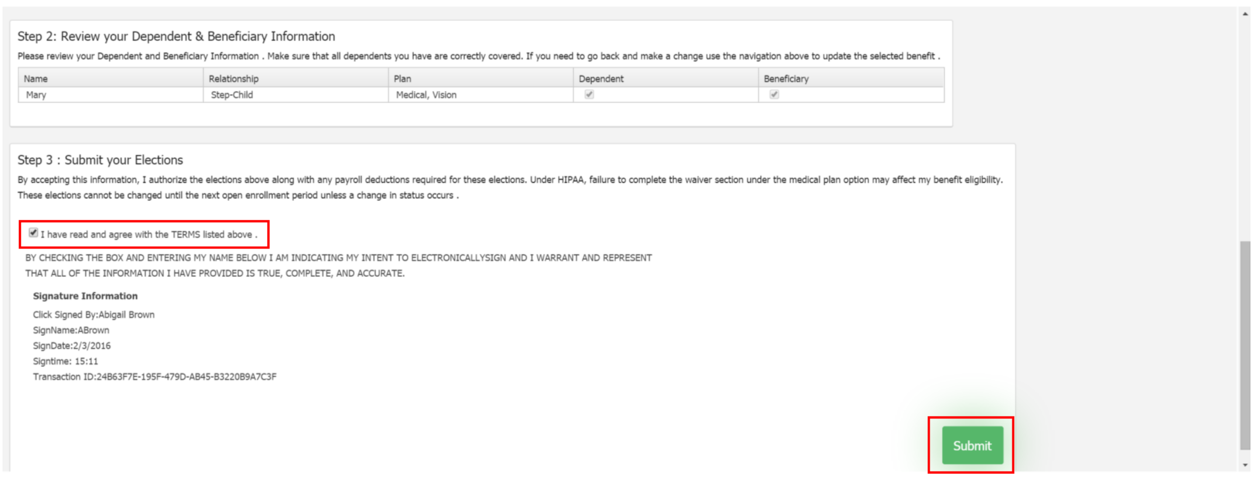


5. The employee has the option to **Enroll in the Plan** or to review another plan. After enrolling in a benefit plan, the user's selection will appear on the screen.
6. When all elections are complete, click the **Finish** button:



7. The user can Review and Submit their Elections. Scroll to the bottom of the screen and check **I have read and agree with the TERMS listed above** and click **Submit**:



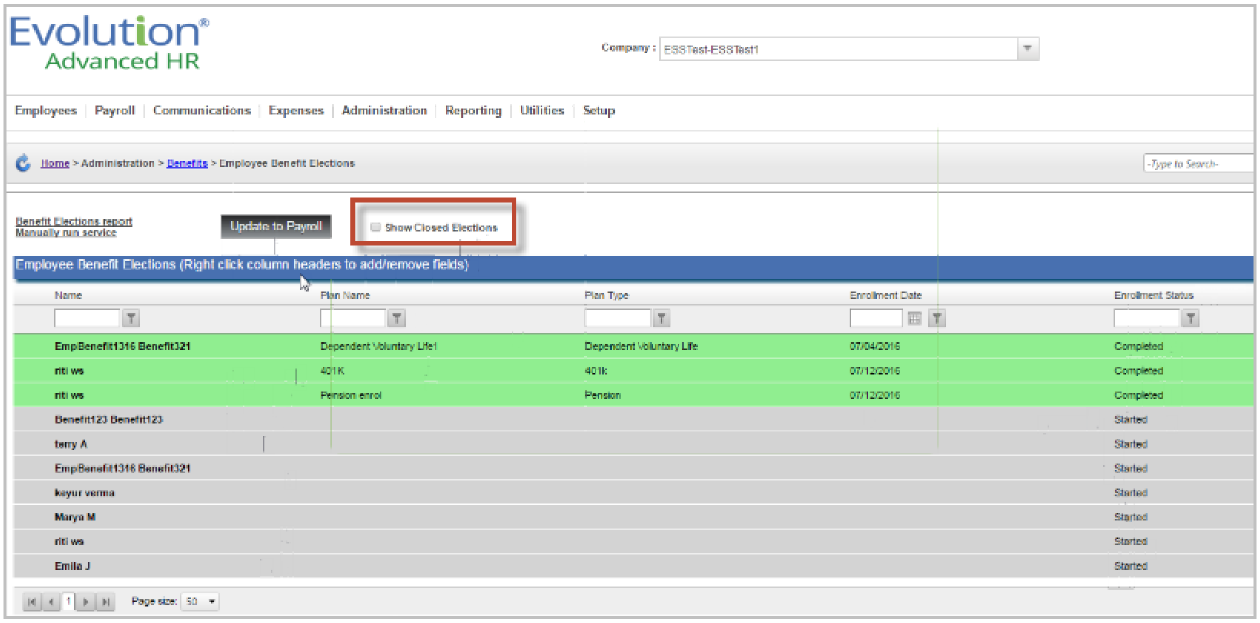


8. The newly enrolled benefits will appear on the **Current Benefits** screen in the Employee Portal once the Administrator has approved and enrolled the Employees benefits.

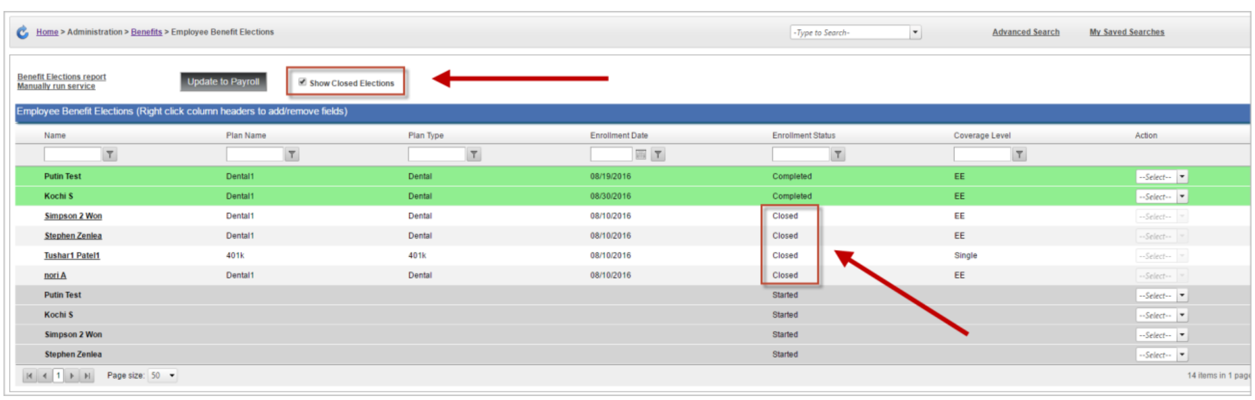
Employee Benefits Election screen - Hide/Show Closed Elections option

The **Employee Benefits Elections** screen has a **Hide / Show Closed Elections** option. The default is to have the Closed Elections not display on the screen – the **Show Closed Elections** option displays instead. This both improves the performance of the loading of the screen and makes it more usable by not displaying the Closed Elections by default, but also provides the user with the option to display the Closed Elections, if required.

Show Closed Elections option unselected (this is the default)



Show Closed Elections option selected

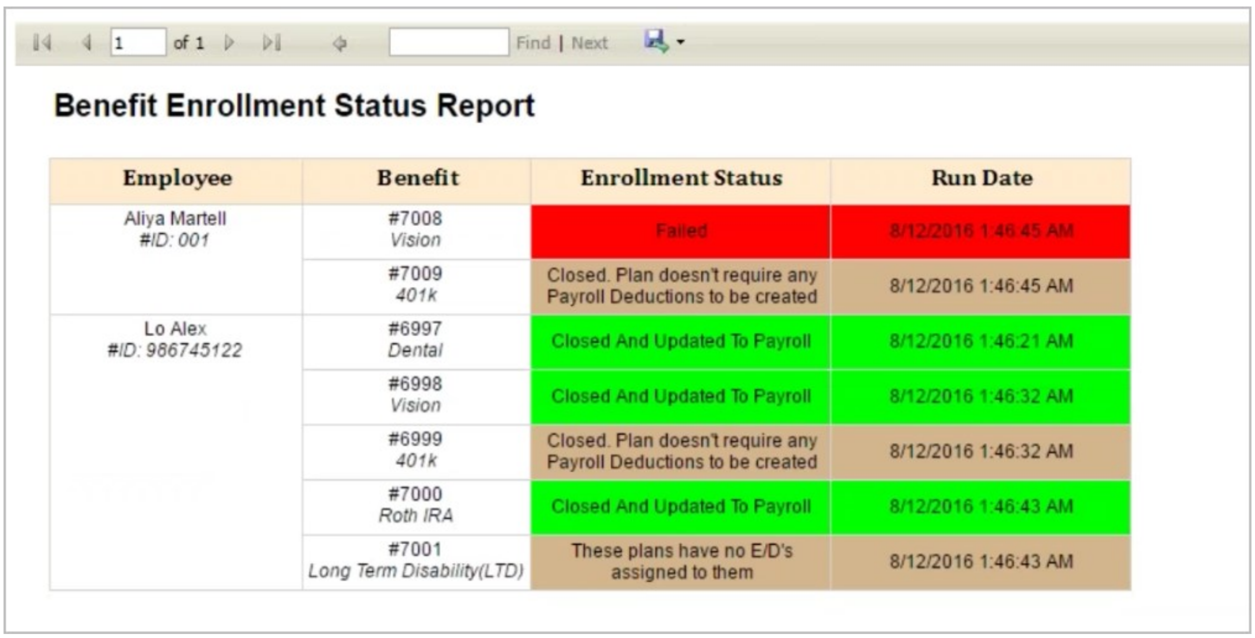


Benefit Enrollment Status Report

A Benefits Enrollment Status report is available from the Employee Benefits Election dashboard to display to the user the results of a batch enrollment; which enrollments failed and why. This will provide the user with improved information concerning what to do next. Previously, if an enrollment failed, the process came to a stop and the system did not continue with the subsequent enrollments.

After the user clicks on the **Update to Payroll** button on the **Administration** – **Employee Benefits Election** screen, the system runs the batch enrollment. When completed, the system displays a dialog box with the results, such as shown to the right.

The user can click the **See a report** button to display the Benefit Enrollment Status Report to get more details about the batch enrollment. An example is shown below.



Benefit Enrollment Status Report

Employee	Benefit	Enrollment Status	Run Date
Aliya Martell *#ID: 001*	#7008 *Vision*	Failed	8/12/2016 1:46:45 AM
	#7009 *401k*	Closed. Plan doesn't require any Payroll Deductions to be created	8/12/2016 1:46:45 AM
Lo Alex *#ID: 986745122*	#6997 *Dental*	Closed And Updated To Payroll	8/12/2016 1:46:21 AM
	#6998 *Vision*	Closed And Updated To Payroll	8/12/2016 1:46:32 AM
	#6999 *401k*	Closed. Plan doesn't require any Payroll Deductions to be created	8/12/2016 1:46:32 AM
	#7000 *Roth IRA*	Closed And Updated To Payroll	8/12/2016 1:46:43 AM
	#7001 *Long Term Disability(LTD)*	These plans have no E/D's assigned to them	8/12/2016 1:46:43 AM

The Benefit Enrollment Status Report includes the following: Employee Name, Plan Name, Employee Code, the Enrollment Status and the Run Date. The following Enrollment Status will display:

- **Closed and Updated to Payroll** - Displays when the system receives a Scheduled E/D successfully filed message from Payroll. This counts as Succeeded.
- **Closed**. **Plan doesn't require any Payroll Deductions to be created** - Displays for plan types that are not currently integrated. This counts as Succeeded.
- **Failed** – Displays when the system received an exception from Payroll; it was unable to create the Scheduled E/D code. This counts as Failed.

Chapter 11: The Employee Portal

Companies seeking to provide a seamless integration of human resources administration will appreciate the ease and convenience of communicating via a web accessible portal. Employees are enabled to make their changes to "paperwork" via an interface that then is automatically sent to the appropriate staff for approval.

Using the Employee Portal

The employee portal is divided into a number of sections, and may include: Community Announcements, Activity Feeds, and icons for Employee screens. There are also social areas for Groups and Discussions, and a section to review a company directory.

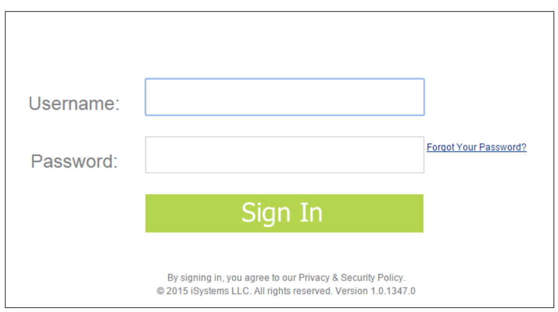
The Employee Portal can be configured to allow sections of content for the employees. Content such as Employee Profile, Benefits, and Talent information can be configured for employee review. The following sections are outlined in this section of the user guide:

- My Info
- Payroll
- Documents
- Benefits
- Training
- Payroll

Subsections of certain sections can be enabled or disabled. For example, you may want to enable the "My Info" page, but disable direct deposit information. The portal can also be customized to include company specific items, company announcements, widgets, etc.

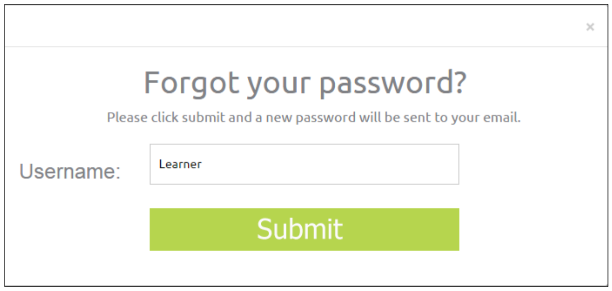
Logging into the Advanced HR Employee Portal

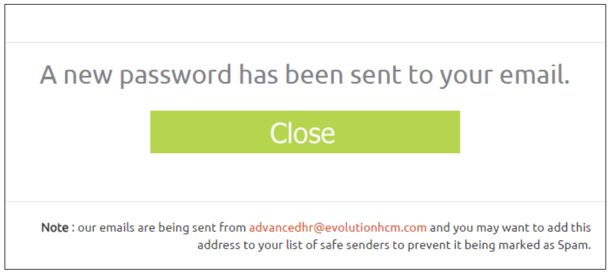
1. To log into Advanced HR, open a web browser and navigate to the Advanced HR login site. Users will need to be provided with the Advanced HR URL.



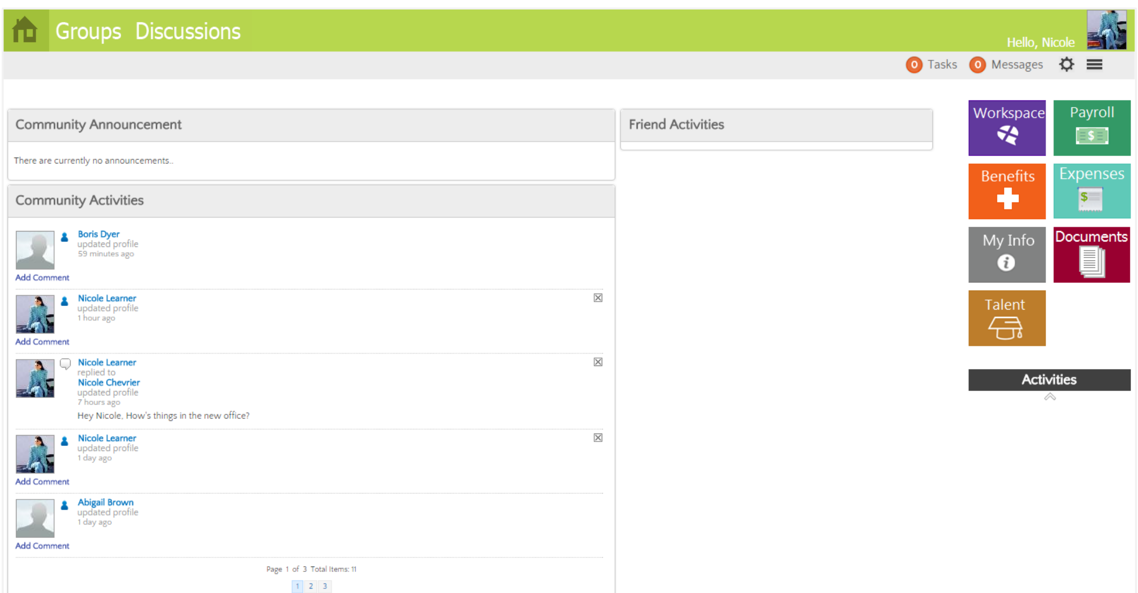
2. Enter your Evolution **Username** and **Password** in the fields provided. Credentials are the same that were used to access Evolution.

3. If you forget your password, click on the **Forgot your password?** link and supply the system with your **Username**. The system will email you a link to create a new password.



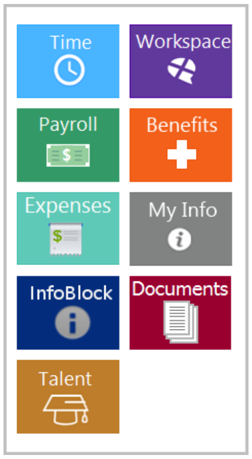


4. Once you've signed in, the system takes you to the Employee Portal.



The employee portal is divided into a number of sections, and may include: Community Announcements, Activity Feeds, and icons for Employee Screens. There are also social areas for Groups and Discussions, and a section to review a company directory.

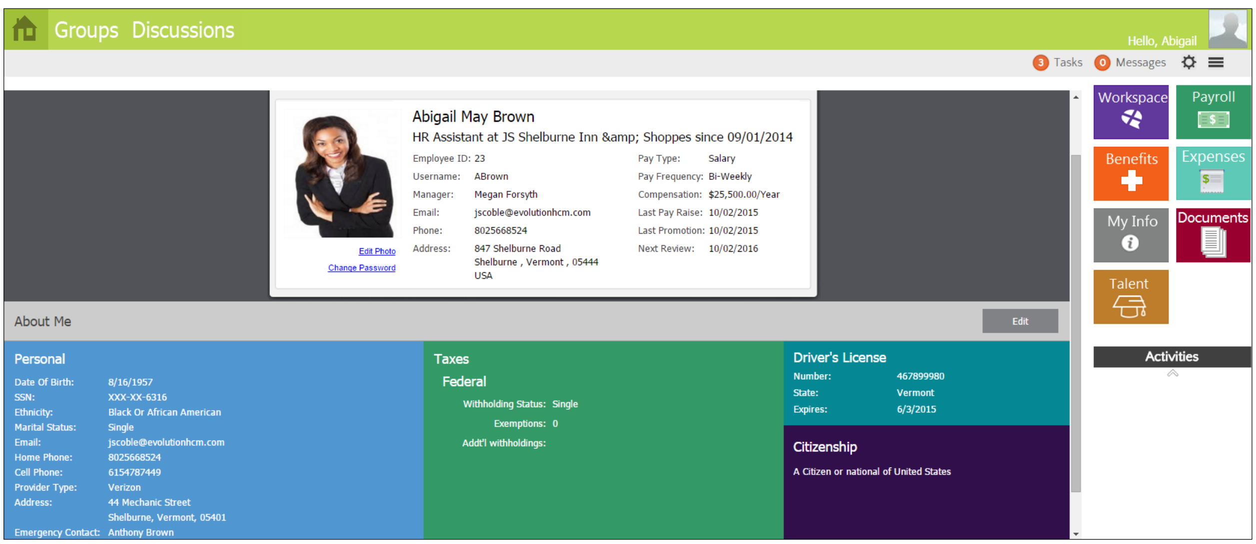
To navigate through your employee information, click on a tile icon on the right side of the screen.



Note: There may be fewer icons based on the number of modules your company chooses to utilize in Advanced HR.

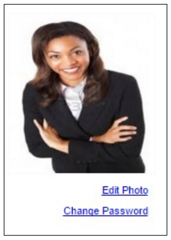
My Info

Click **My Info** to get an account of your primary employee information. Information, such as job and pay, personal, license, citizenship, taxes, and direct deposit, will appear in the **My Info** section.



If editing capabilities are enabled, you can click the **Edit** button to modify data on your record. Click **Edit** to modify data such as name, address, and emergency contact information. All fields marked with a red asterisk (*) are required and must be completed.

Once you are finished with editing the record, click **Save** at the bottom of the screen to accept the changes. If employee edits require workflow approval (configured in **Setup – Manage Roles**), the system administrator(s) will receive an email with the update request.



To edit your employee photo, click the **Edit Photo** hyperlink under the photo area in the **My Info** section.

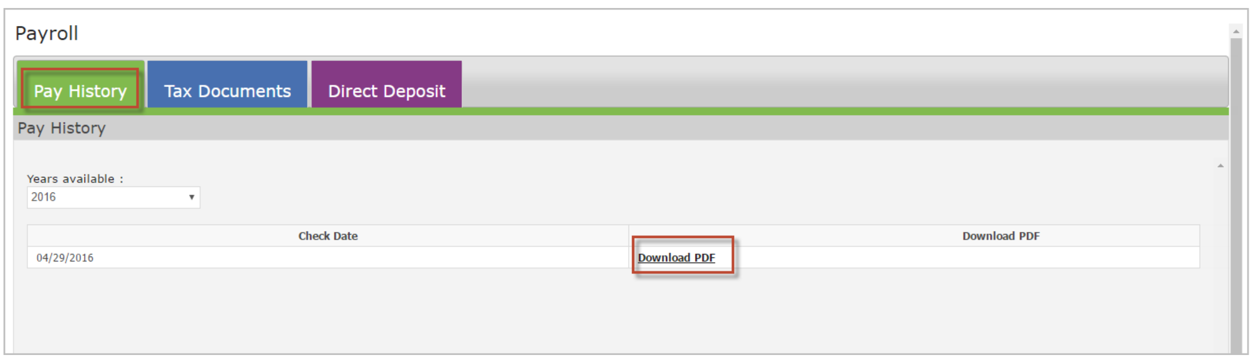
Click the **Choose File** button to upload the photo file. Use the File Upload window to navigate and select the photo. Click **Save** to save the photo to your profile. Your photo will now appear on the **My Info** screen, as well as in the **Groups and Discussions** areas of the system.

You can also modify your password by clicking the **Change Password** hyperlink in the **My Info** section as well.

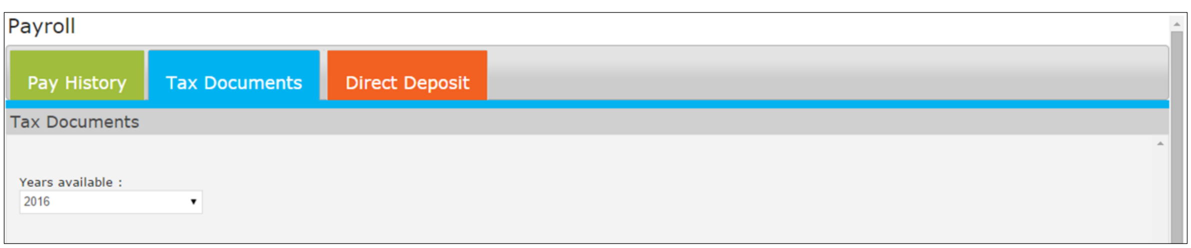
Payroll

Allows employees access to view Payroll Information such as Pay History, Tax Documents, and Direct Deposit information can be displayed in the Payroll section of the portal.

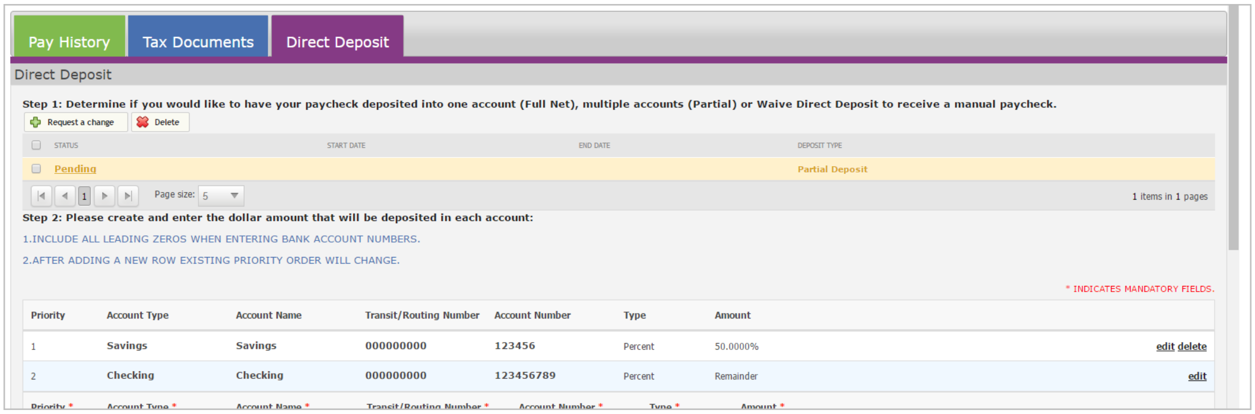
The **Pay History** tab allows employees to view and download a copy of paystubs and displays checks in PDF format by Check Date.



Similarly, the **Tax Documents** tab is sorted by year and displays W-2 and other tax documentation.



The **Direct Deposit** tab allows employees to view Direct Deposit account information and offers employees the ability to update how paychecks are deposited into accounts.



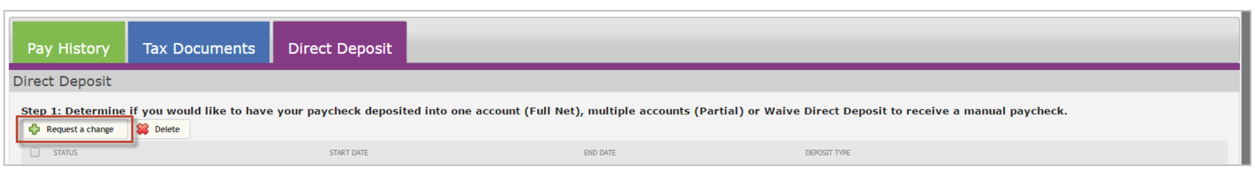
Via the **Direct Deposit** tab, an employee may:

- Opt to waive Direct Deposit Authorization to receive a manual paycheck.
- Add a Full Net Direct Deposit account.
- Add Partial Direct Deposit accounts.
- Request a change to existing Direct Deposit account information.

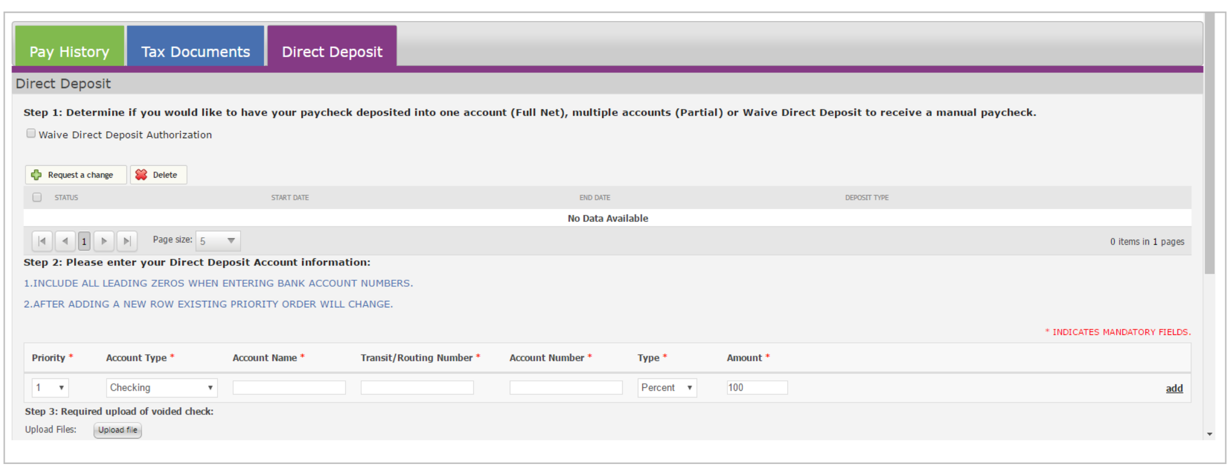
Adding a Direct Deposit account (full net deposit in 1 account).

The Employee can request a direct deposit request by logging on to the Port. Perform this task below to submit a full net deposit in one account. Perform this task even if you will be adding multiple accounts.

1. Login to the Employee Portal.
2. Click on the **Payroll** menu item at the right.
3. On the **Payroll** screen, click the **Direct Deposit** tab.
4. Click on the **Request a Change** button.



5. Enter account information in the **Step 2** section of the screen:



- Select the **Account Type** (Checking, Savings, Issue Paper Check, etc.).
- Enter the **Account Name**.
- Enter the **Transit/Routing Number**.
- Enter the **Account Number**.
- The **Type** defaults to **Percent** when you add the first direct deposit account.
- The **Amount** defaults to **100%** when you add the first direct deposit account.

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Type	Amount
1	Checking	Checking	000000000	123456789	Percent	100%

6. Click the **Add** button at the right side of the row.
7. In the **Required upload of voided check** section, click on the **Upload file** button to upload a voided check. Click the **Submit** button to upload the check.
8. Review the Direct Deposit Authorization Statement section.
9. If you want your entire paycheck direct deposited into the single account you entered above – then click on the **Save** button – you are done – the status is Pending until approved by your HR Admin, Payroll staff, or the manager (whoever has the authority to approve direct deposits in your company.

Adding additional direct deposit accounts (partial deposits)

Once you have added the first direct deposit account, you can add additional accounts, and prioritize the order in which you want them to occur.

1. If you want to have your paycheck deposited in additional accounts, click the **Add** button at the right side of the row. The system creates a new blank row at the bottom of the screen to enter information for the new account. The system defaults the **Priority** field to **1** and the **Account Type** field to **Checking** (you can change these).

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Type	Amount	
1	Checking	Checking	000000000	123456789	Percent	100%	edit
Priority *	Account Type *	Account Name *	Transit/Routing Number *	Account Number *	Type *	Amount *	
1	Checking						add

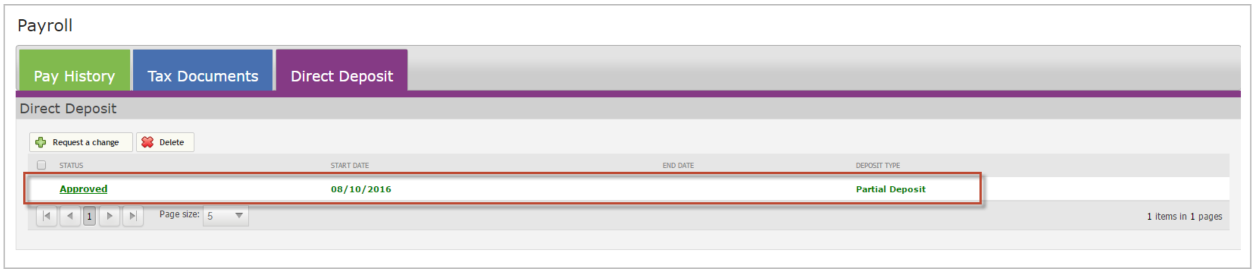
- Select the **Account Type** (Checking, Savings, etc.).
- Enter the **Account Name**.
- Enter the **Transit/Routing Number**.
- Enter the **Account Number**.
- Select the **Type** of deduction from the dropdown (**Percent** or **Dollar**).
- Enter the **Amount** (either the percentage number or the dollar amount). The percent choosed across multiple accounts must total 100%.

2. Click the **Add** button.
3. Adjust the **Priority** of the accounts, if required. To change the priority of an account, click on the **Edit** button on the row for the account.
4. The system moves that account row to the bottom of the screen. Click on the **Priority** dropdown and select a different priority number for this account. You can't change the **Priority** of a **Remainder**; it is always the last priority.
5. In the **Required upload of voided check** section, click on the **Upload file** button to upload a voided check. Click the **Submit** button to upload the check.
6. Review the Direct Deposit Authorization Statement section.
7. Click **Save**.

Priority	Account Type	Account Name	Transit/Routing Number	Account Number	Type	Amount	
1	Checking	Checking2	000000000	6576	Dollar	$20	edit delete
2	Savings	Savings	000000000	6500	Percent	50%	edit delete
3	Checking	Checking	000000000	123456789	Percent	Remainder	edit
Priority *	Account Type *	Account Name *	Transit/Routing Number *	Account Number *	Type *	Amount *	
1	Savings	Savings	000000000	6500	Percent	50	save cancel

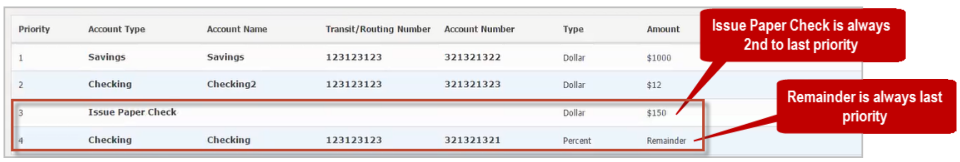
The status is Pending until approved by your HR Admin, Payroll staff, or the manager (whoever has the authority to approve direct deposits in your company).

Once the approver approves the employee's direct deposit request, the **Status** on the direct deposits request screen changes to **Approved**.



Direct Deposit Notes

- When the user adds a new row into the Direct Deposit screen, by default, the system will set the Priority of the new row to Priority 1. The user can change the Priority.
- The Issue Paper Check Account Type option will always be the second to the last Priority item. The reason for this it the specific way that we submit payrolls in Evolution Classic and create direct deposits and not by an associated E/D for the paper check (the Take Home Pay field value in Evolution Classic).



- The Remainder amount is always the Last priority in the direct deposit elections. You can't change the Priority.

Note: Account information is only editable in a status of Pending.

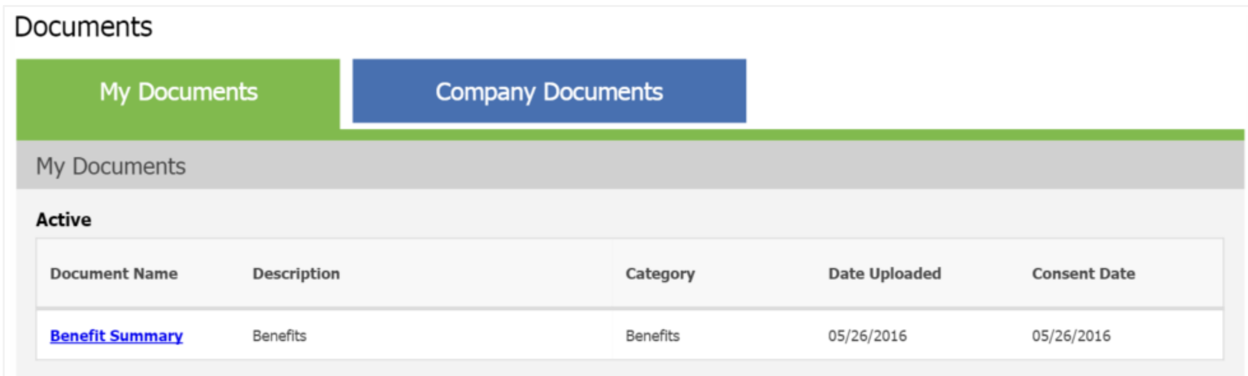
Documents

The documents area allows you to view all company-wide documents added to the system, as well as individual documents assigned to your record. **My Documents** include:

- Items that were entered into the employee folder in HR Administration, or,
- Consent documents created during time of new hire and onboarding.

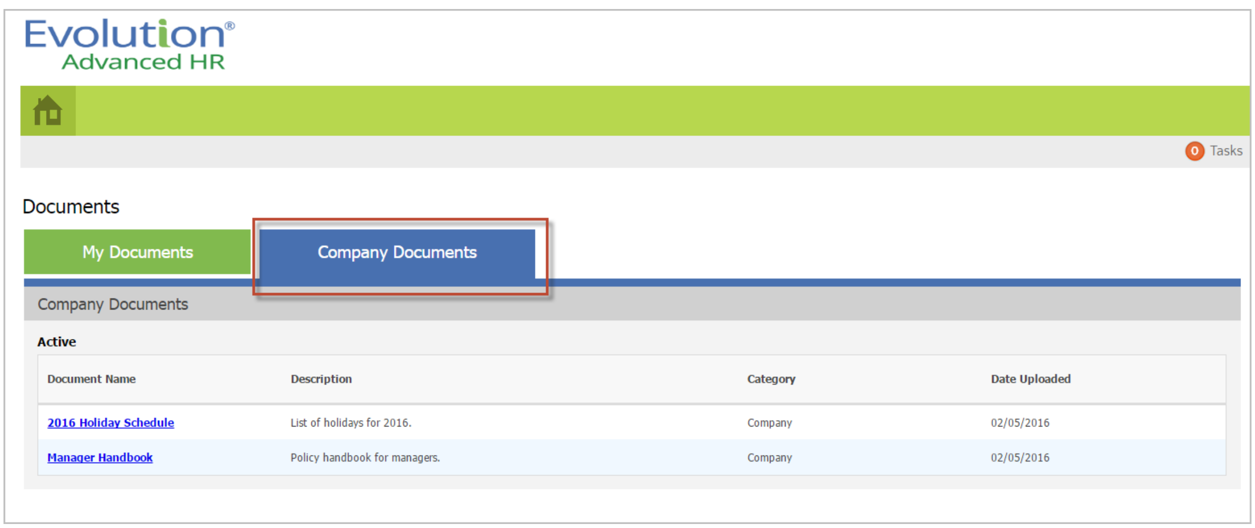
When **Documents** is selected, you are presented with two tabs: **My Documents** and **Company Documents**. Select either tab to obtain a list of documents available.

My Documents represent attachments specific to the employee.



Document Name	Description	Category	Date Uploaded	Consent Date
Benefit Summary	Benefits	Benefits	05/26/2016	05/26/2016

Company Documents are global documents shared to the entire organization. Click on the document name to be directed to the document via hyperlink.

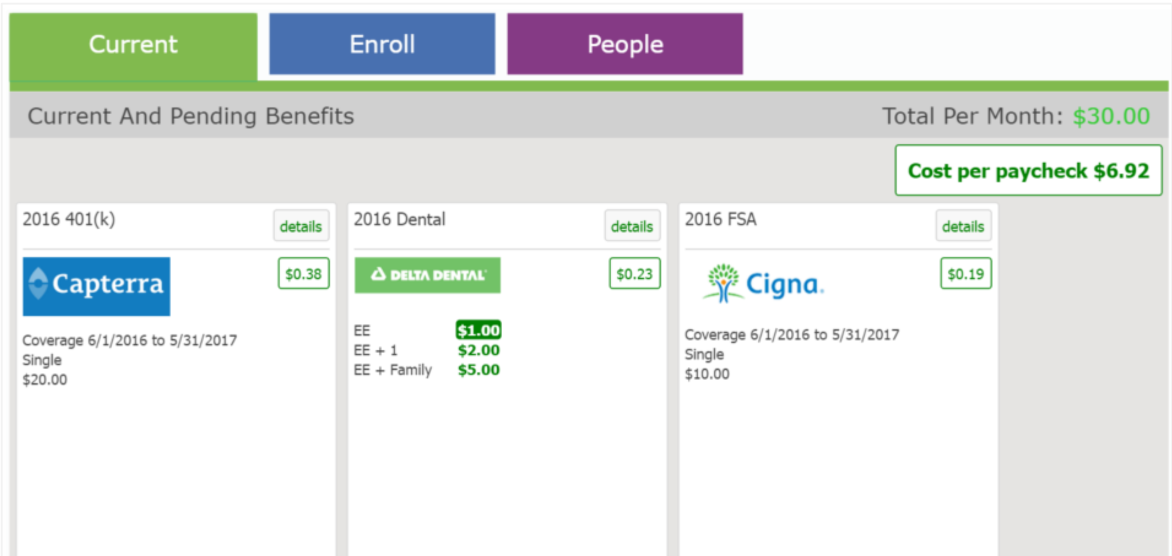


Document Name	Description	Category	Date Uploaded
2016 Holiday Schedule	List of holidays for 2016.	Company	02/05/2016
Manager Handbook	Policy handbook for managers.	Company	02/05/2016

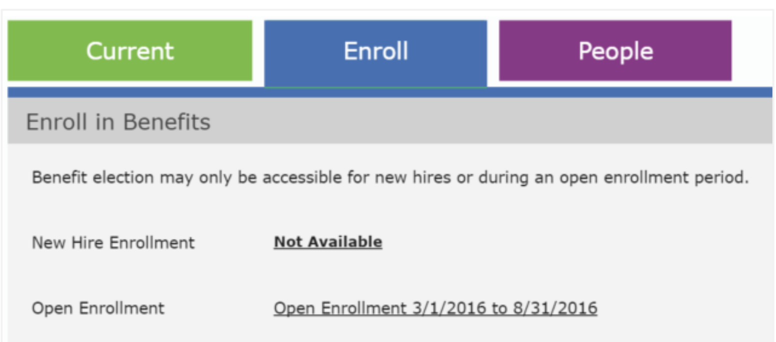
Benefits

Employees can review benefit information using the **Benefits** icon. The Benefits section of the portal contains three (3) sections: **Current**, **Enroll**, and **People**.

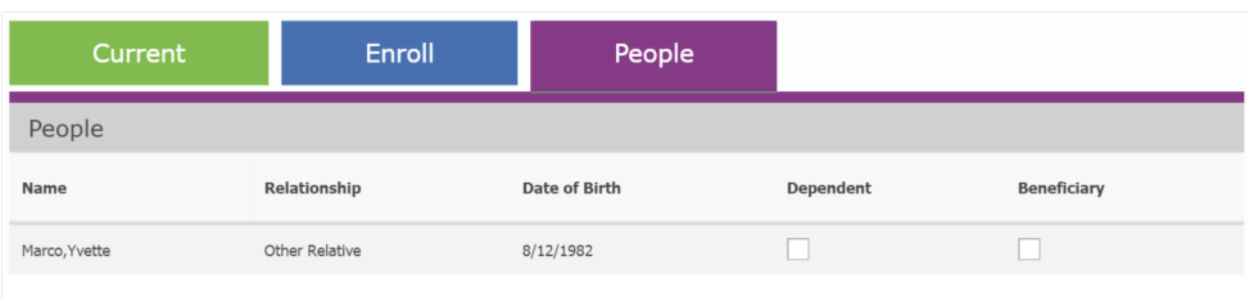
The **Current** tab provides information on benefit plans the employee is currently enrolled in. Plans, details, coverage amounts, and costs are displayed on this page. Employees can also obtain a printout of this information by clicking **Print** at the bottom of the screen.



The **Enroll** tab allows employees to enroll into benefit plans.

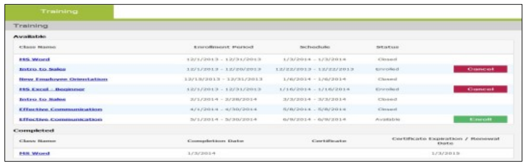


The **People** tab allows employees to review dependents and beneficiaries.



Training

The training section of the portal, accessible via the **Talent** navigation tile, displays available and completed classes. Employees can enroll in available classes by clicking the **Enroll** button on the class. Employees can also review details of the class (document attachments, web links) by clicking on the hyperlink for the class.



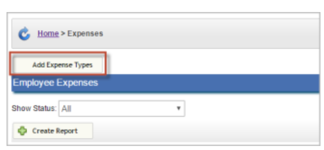
Expenses

Allows employees to enter and review expense reports using the Expenses section of the portal. An expense report can contain multiple expense entries. Examples of expense reports could include an itemized list of expenses for a trip, a monthly report of all expenses, or a purchase that needs approval. A list of all active expenses reports, as well as recently approved reports, are displayed. Pending requests can be cancelled by clicking the **Cancel** button beside the report. Expenses can be used at any time after the company has been on boarded into Advanced HR by users with access to the Expenses tab.

Advanced HR has six (6) default Expense types, listed below.

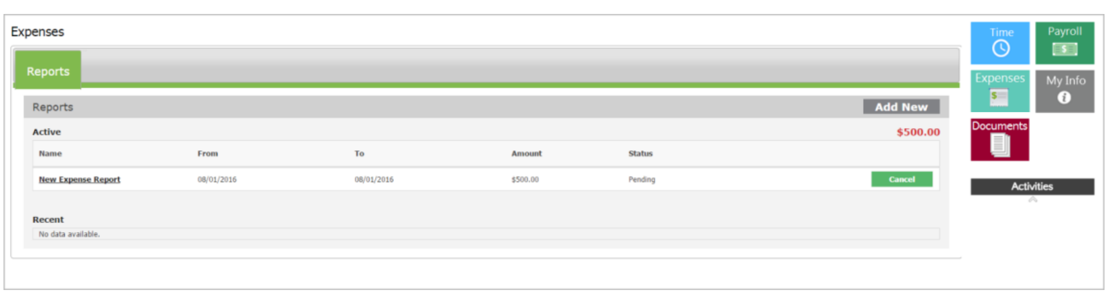
- Gas
- Hotel
- Meals
- Mileage
- Travel
- Vehicle

To add additional Expense types, go to the **Expenses** tab and click on **Add Expense Types**.



Once the expense is entered, click **Save** to save that expense entry.

To submit the entire expense report, click the **Submit** button at the top of the expense report screen. The expense report will be submitted to the manager.



Chapter 12: Time Management in the Portal

Advanced HR utilizes the company's current Time Off Accrual setup in Evolution to allow employees and managers to see Time Off Balances, Request time off, and Approve time off in the Advanced HR Portal. In the sections below, users will learn key information in the setup of Time Off Management for Advanced HR.

Using Time Off in the Portal

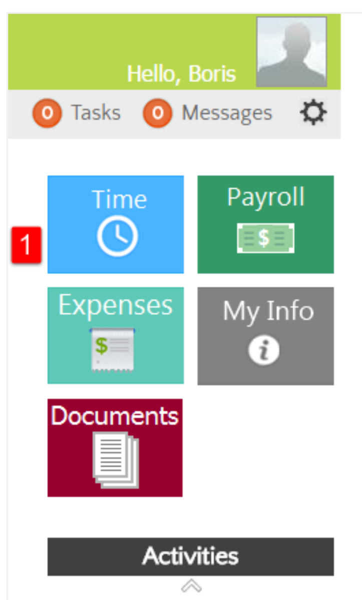
Employees and Managers can access Time off Requests in the Portal by clicking on the **Time** tile. Depending on their role, they will have up to four (4) tabs from which to work:

- **Employee Requests** – For manager/time off approver use. This tab displays pending employee requests to be reviewed.
- **My Requests** – Displays the employee's current time off requests and balance information.
- **My History** – Displays the employee's Time Off history including past approved and denied requests.
- **Time Off Analysis** – For manager/time off approver use. This tab displays pending and approved time off requests for employees in the Time Off approver's team. This tab allows the time off approver to analyze the requests and see any potential conflicts.

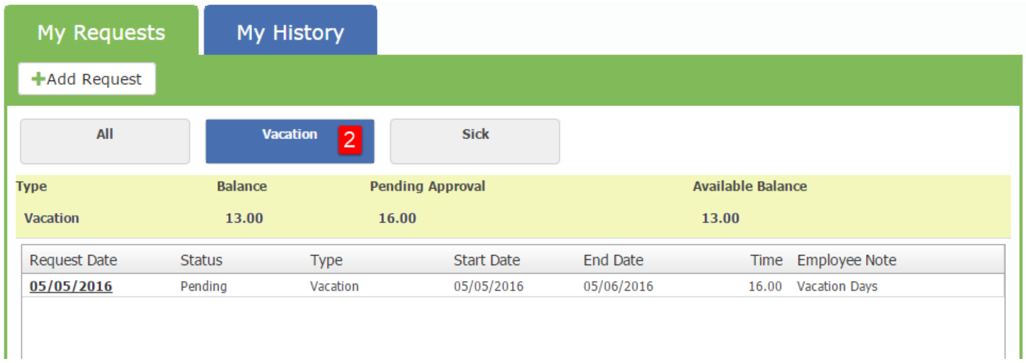
Checking your current Time Off balance

To check your current Time Off balance:

1. On the Portal, click on the **Time** tile.



2. On the **My Requests** tab, click on the type of Time Off for which to check the balance.



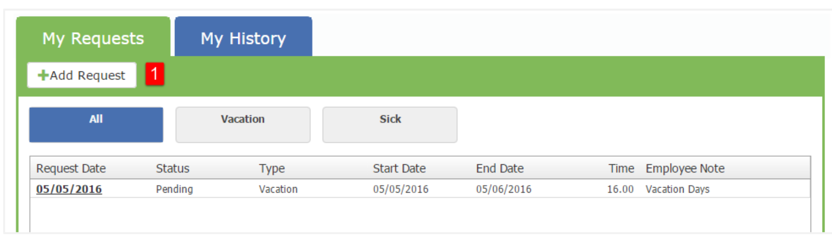
3. The balance of that Time Off plan will be displayed beneath the buttons.

Note: If only one type of PTO is available, the Balance will be displayed automatically.

Requesting time off

To request time off:

1. From the **My Requests** tab, click on **Add Request.**



2. Select the Plan Type by clicking one of the buttons on the left side of the screen (**Vacation**, **Sick**, etc.).
   - If selected on a particular Time Off plan when clicking on **Add Request**, the request will default to that plan type.
   - Enter in the **Start** and **End** date for which this Time Off is being requested for.

Note: When entering the start and end dates, additional days will appear in the request grid, one for each workday within the request dates.

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3. Enter the number of hours per day that you are requesting.

Note: Entering the number of hours here will default the number of hours per day.

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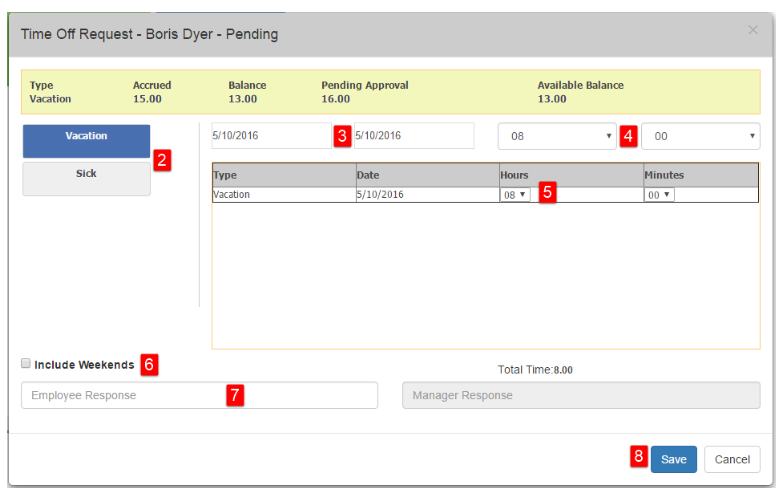
4. If one or more days should have a different number of hours requested, use the drop-down list on that particular day to change the number of hours.

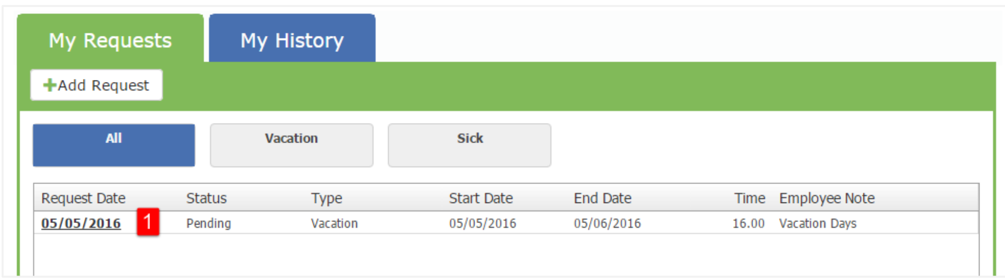


5. If weekends should be included as part of the request, select the **Include Weekends** option.
6. Enter a note in the **Employee Response** as needed.
7. Click on **Save** when complete.

This time off request will now be displayed as **Pending** on the **My Requests** tab. While this request is in Pending status, it can be edited by the employee.

To edit a Pending time off request:

1. From the **My Requests** tab, click on the date of the pending request.



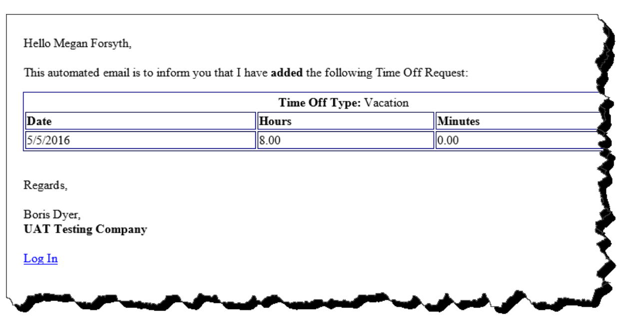
2. Update the necessary information.
3. Click **Save** when complete.

Additional Time Off requests can also be entered. If an employee has a Time Off request that is currently in **Pending** status, and they enter another Time off Request for the same Time Off type on adjoining days, Advanced HR will combine those requests into a single request.

Example: Boris Dyer has entered a Time Off request for Vacation time on 5/5/2016. This request is currently in Pending status. He has also decided that he would like to take off the next day, 5/6/2016. Boris can click on Add Request, and enter in a request for 5/6/2016. When he saves it, since his original request is still pending, Advanced HR will combine these requests.

Time Off approval

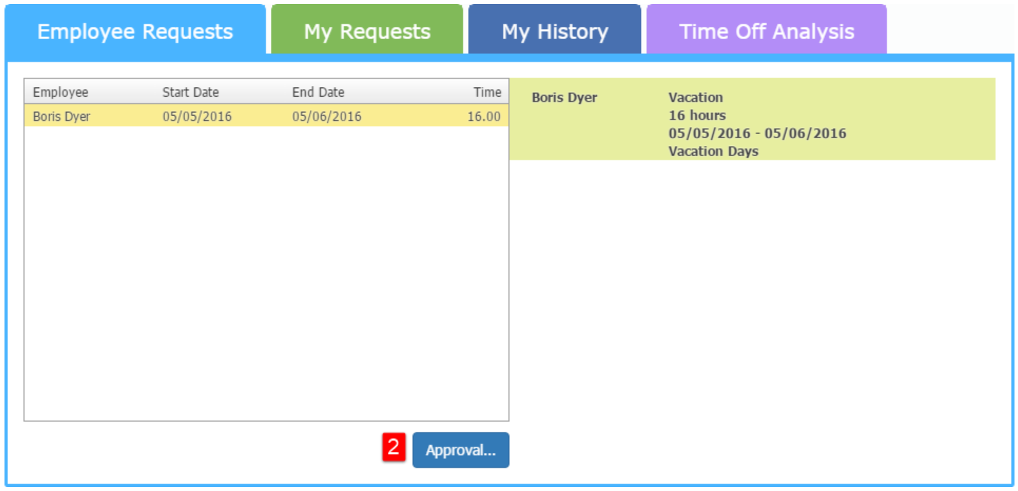
When an employee submits or updates a Time Off request, the manager(s) receives an email with the information. The email is sent to the manager's Work Email address from Advanced HR.



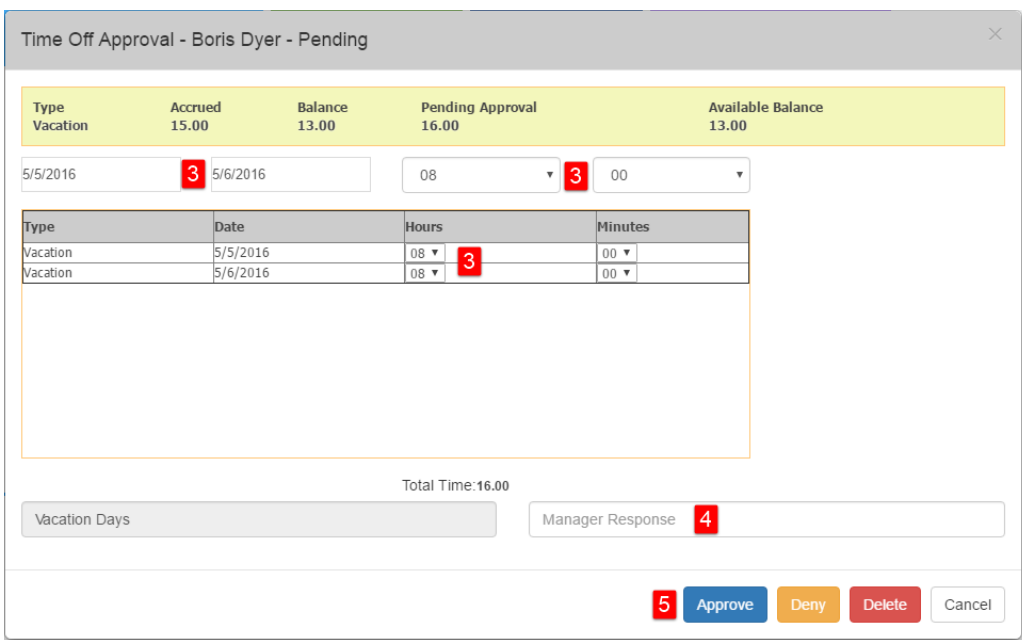
The email contains the Dates and Hours of the employee's Time Off request as well as a link to log into the portal.

To Approve/Deny time off:

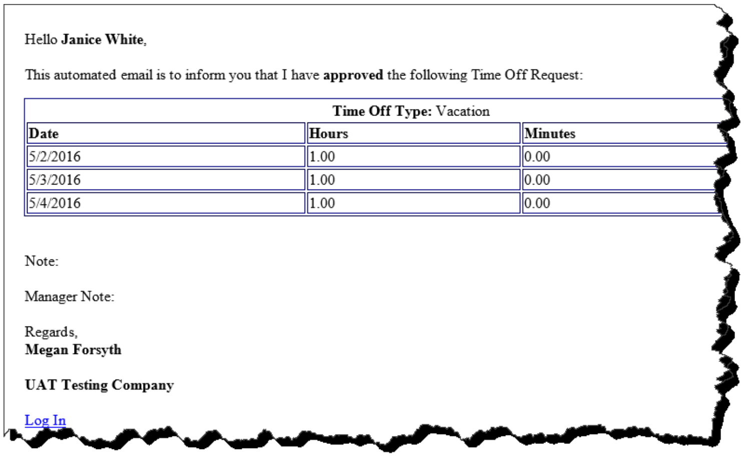
1. Log into the portal and click on the **Time** tile.
2. On the **Employee Requests** tab, select the **Time Off Request** and click on the **Approval** button.



3. Review the Time Off request information.
   Managers may update the dates or the number of hours on any of the time off dates.



4. Enter in the **Manager Response** as needed.
5. Click on **Approve, Deny,** or **Delete** to take action on this Time Off request.
6. An email is sent to the employee with the response regarding this Time Off request.


Hello **Janice White**,

This automated email is to inform you that I have **approved** the following Time Off Request:

Time Off Type: Vacation		
Date	**Hours**	**Minutes**
5/2/2016	1.00	0.00
5/3/2016	1.00	0.00
5/4/2016	1.00	0.00

Note:

Manager Note:

Regards,
Megan Forsyth

UAT Testing Company

Log In

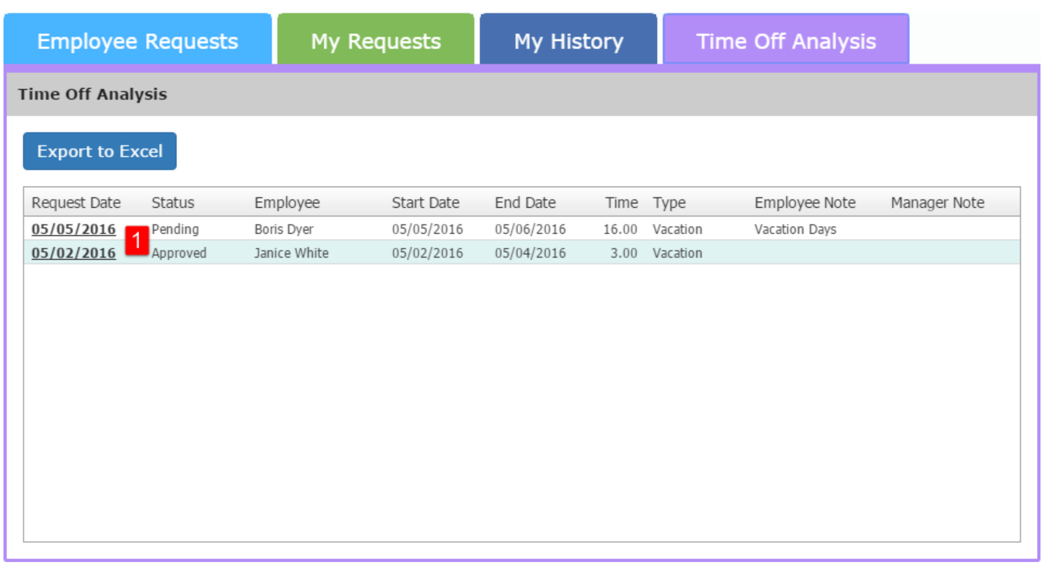
Time Off Analysis

The **Time Off Analysis** tab can be used to review multiple employees' time off requests and give managers easier access to see if there are any conflicts. This tab will display both Pending and Approved Time Off requests. Pending Time off can also be approved and Approved Time off may be edited by the manager from this tab.

To approve pending or edit approved time off:

1. Click on the **Request Date**.
2. Update the information as needed.
3. Click on **Approve**, **Deny**, or **Delete**
4. Enter in the **Manager** Response.
5. An automated email will be sent to the employee.

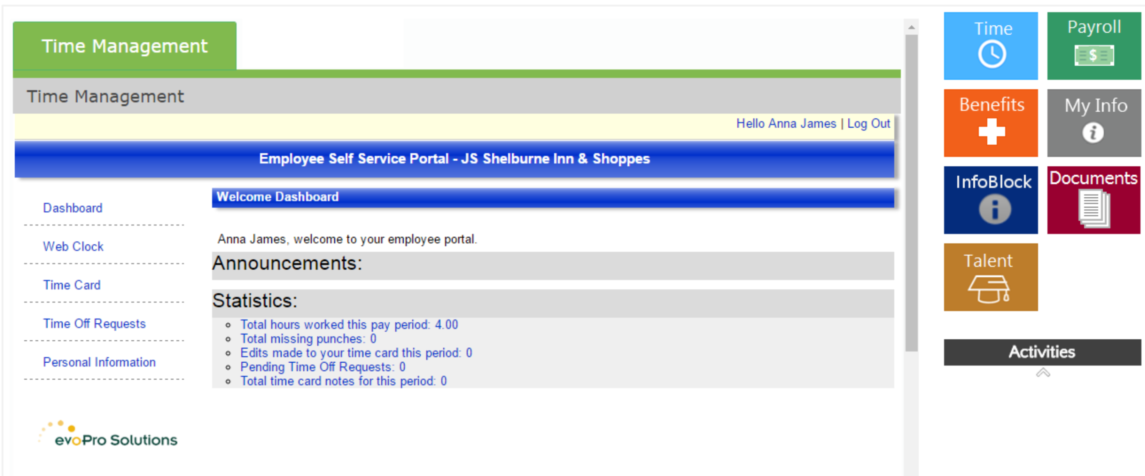
Note: Time off analysis can be exported to Excel by clicking on the Export to Excel button.



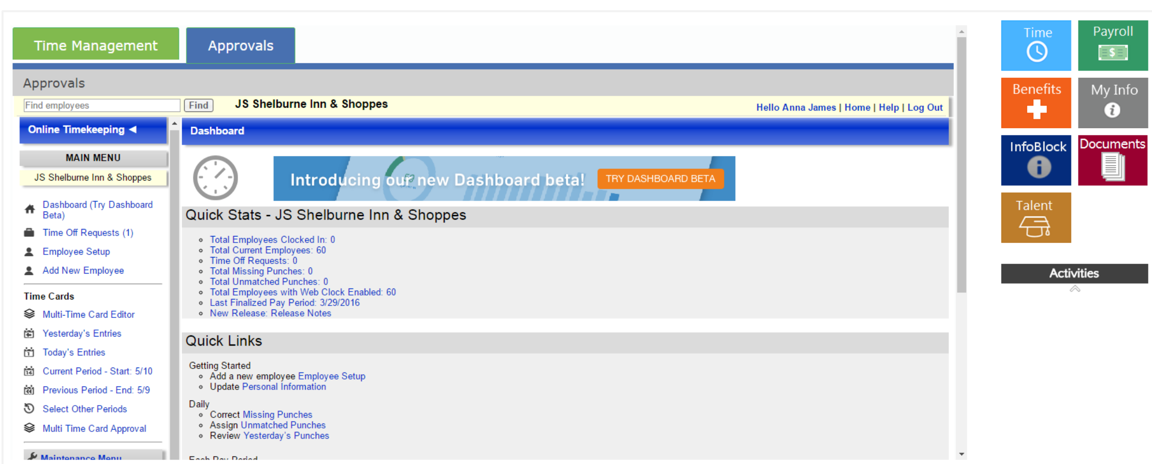
SwipeClock Portal view

Once completed, employees will be able to access their SwipeClock information by clicking on the **Time** tile in the Portal. There are two tabs that will be available depending on the employee's role in the time keeping system.

All employees will see a **Time Management** tab where they will have whichever options are available to them in the time keeping system. This can include the dashboard, web clock, time sheet, Time Off requests, and Personal information.



Supervisors/Managers will also have an **Approvals** tab for approving Time Off, Time Cards and completing their time keeping duties.



Appendix 1: To create a user in Evolution Classic

To create a user in Evolution Classic, follow the steps below:

1. Log into Evolution Classic.
2. Go to **Admin – Security – Users – Details** tab.
3. Click the **Plus** sign in the toolbar to create a new record.
4. Enter a **User ID**.
5. Enter the User's First and Last Name.
6. Click **Yes** in the **Active User** box.
7. Create/confirm a password (This password can be changed at a later time.).
8. Select the **Security Level**.
    - **Administrator:** can change security settings for all users
    - **Manager:** can change security settings for managers, supervisors and users
    - **Supervisor:** can change security settings for supervisors and users
    - **User:** can change their own security settings, but cannot view or change settings for which they don't
9. Select a **Department** currently have access.
10. Select the appropriate **Analytics Personnel**.
11. Select the **User's Stereotype**:
    - **S/B Internal**: Employee of the service bureau
    - **Remote**: Client who accesses Evolution Classic. Select the client name in the field to the right.
    - **Web**: Client who access Evolution Classic through the Internet and uses an ancillary iSystems product to create payrolls
12. Go to the **Groups** tab.
13. Select and add the User's **Security Group**.
14. Click the **Checkmark** sign in the toolbar to save the record.

Appendix 2: Employee Payroll fields

The following tables are a list of the field descriptions for the Evolution Payroll Employee screens running within Advanced HR.

Employees - Labor Defaults screen

Field / Button	Description
Workers' Compensation	Workers' Comp Code assigned to the Job associated with the claim.
Job	Job set up by the company.
Pay Group	Select the pay group.
General Ledger Tag	**Enter if the company is using General Ledger.**

Employees - ACA Screen

Field / Button	Description
ACA section	
ACA Status	Previously located on the Employee – Personal screen this field has been moved to the new ACA screen. May be automatically filled for new employees with the default ACA Status set up on the Company - General - Company Info - ACA tab, used to determine whether the employees are to be considered new employees or continuing employees, full-time eligibility, etc.
ACA Coverage	Select the applicable option for this employee from the 1095-C Instructions – Line 14.
ACA Benefit	Select the name of the benefit that will be used to determine the Lowest Cost Benefit for this employee.
ACA Policy Origin	Select the appropriate option for this employee for use on the 1095-B – Line 8.
Benefits Eligible	This field defaults to whatever was set as the default on the Company - General - Company Info – WComp & Benefits tab.
Reporting section	
Form on File	Is there a consent form on file for the employee to allow electronic publishing of the 1095 form(s)?
ACA Format	Select the form format that will be created for the employee. None, Both, or Paper.
Form Type	New employees are assigned the default field that is assigned at the Company level. This can be overridden using this field. • Right-click and select **Copy to…** to copy to other employees.

Field / Button	Description
ACA section	
ACA Standard Hours	Enter the standard number of hours for salaried employees, which will be used when calculating ACA hours.
Applicable Section 4980H	Select the appropriate option for this employee from the 1095-C Instructions – Line 16.
Lowest Cost Benefit	Select the Lowest Cost Benefit to be used on the 1095-C.

Employees - Pay Screen

Field / Button	Description
Salary Information section	
Pay Frequency	How often the employee's paycheck is processed.
Salary Amount	Salary earned per pay period (salaried employees only).
Standard Hours	Number of hours the employee is expected to work (this may be left blank for salaried employees working a 40-hour week.)

Average Hours	Average hours the employee works – this field is system-calculated and is not editable.
Rate Number	The rate number if not the primary rate – this is read only.
Rate Amount	The rate for the rate number above.
Wage Limit	Wage limit used for Workers' Comp billing and impounds.
Limit Frequency	If there is a wage limit, to what period is the limit applied?
Annualized	If there is a wage limit for a period other than annual, what is the annualized total amount of the limit?
Calc Annual	The system automatically calculates the annualized salary or pay based on the value in Salary Amount times pay frequency or the value in Rate Amount times the pay frequency times standard hours.
Planned Updates section	The following fields are informational only, and do not affect pay amounts now or in the future.
Raise Date	The date a future raise takes effect.
Raise Amount	The potential amount of the future raise. Use this for salaried or hourly employees. If there is a value in this field, leave the Raise Rate field empty.
Raise %	The potential percentage of the future raise. Use this for salaried or hourly employees.
Raise Rate	The hourly rate of the potential raise.
Pay Frequency	The frequency the employee will be paid after the future raise.
Position section	These fields in this section used to be on the Positions screen.

Field / Button	Description
New Hire Report	Required field. **Pending** - select this option any time prior to the employee's first payroll, after which time it is automatically updated to Complete. **Completed** - if the service bureau is using new hire reporting services, the employee has been reported as a new hire **Completed by Predecessor** - the employee was reported as a new hire by another service bureau If an employee's status has changed from another code back to active, when the changes are saved, a message asks if this is a rehire. **No** - system saves the employee record and doesn't ask any more questions **Yes** - system changes the New Hire flag to Pending and opens the Rehire Wizard. The Wizard includes a series of employee screens for the user to verify the employee's set-up for pay rate, states, locals, TOA, Scheduled E/D's, and direct deposits. The Wizard only displays screens applicable to the employee.
FLSA Exempt	Is the employee exempt from minimum wage and overtime pay under the Fair Labor Standards Act?
Position	Employee's work position at the company, set up on the Company – Benefits – HR Positions screen.
Effective Date	Date the employee's position became effective.
High Comp	Is the employee highly compensated?
I-9 on File	The employee's form I-9 is on file.
Corporate Officer	Is the employee a corporate officer?
Overrides section	
Add / Delete buttons	Click to add a pay rate or delete a pay rate that is no longer applicable.
Primary column heading	Select **NO**, if this is not the employee's primary wage at the company.
Rate Number column heading	If a standard wage, the new line should have a Rate Number of 2 or more.
Rate Amount column heading	Enter the amount of the new rate.
Overrides – Job section	
Jobs Number	Number identifying the job that the employee has at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade Position	Position the employee holds in the pay grade at the company. Overrides what was set up on the Employee – Pay Rates screen.
Pay Grade	Pay Grade in which the employee's position falls. Overrides what was set up on the Employee – Pay Rates screen.

Piecework Sub-menu

Field / Button	Description
Add	Click to add a new item to the piecework.
Delete	Click to delete a piecework item.
Piece column heading	Click in the blank line created by clicking the **Add** button. The piece is listed in the dropdown list.
Rate Amt	Rate for the piece. The rate is listed in the dropdown list
Rate Qty	The rate quantity is pulled from Evolution, where it was originally set up at the Client level.

Auto Labor Distribution Sub-menu

Field / Button	Description
Labor Distribution Options	Defaults to **Distribute Both** - method used to distribute employee's labor for unions. They may be distributed for earnings, taxes, deductions, all, or none, and must be used in conjunction with the **Auto Labor Distribution E/D Group** field.
Auto Labor Distribution E/D Group	E/D Group used to distribute the employees' labor.
Allocation section	
Add	Click to create a new record.
Delete	Click to delete an entry.
Percentage	Percentage of the employee's pay attributed to that organizational level.
Organizational Level	Name of the organizational level for which the employee works
Job	Title of the job worked in the level.
WC Code	Workers' Comp code associated with that job.

Employees - Federal screen

Field / Button	Description
Marital Status	Marital status for federal tax purposes.
Exemptions	Number of exemptions for the employee.
Tax Type	Additional or override tax amount.
Value	Based on the tax type, the corresponding value.
FUI Rate Credit	The amount by which to override a FUI Rate Credit, if applicable.
Override Fed Minimum Wage	Value used to override the Federal Minimum Wage rate used in payroll for minimum wage makeup calculations. • If a value is entered, the amount is used as the rate for minimum wage makeup calculations. • The value may be overridden if a State Minimum Wage override is entered on the Employee - States - Overrides tab. In that case, Evolution uses that rate in the calculation. • If both fields are populated, the Federal Override is used in the calculations for all states attached to the employee that do not have overrides set up. Otherwise, the state override rate is used. • If no overrides are entered, standard system logic is applied in the calculation (taking the higher of the Federal or State Minimum Wage rate at the system level). Right-click on the field and select 'Copy To...' to copy the information.
EE Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
Federal Tax Status	This is the employees' tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
OASDI Exempt	Whether or not the employee is exempt from paying OASDI.
Medicare Exempt	Whether or not the employee is exempt from paying Medicare.
ER Tax Statuses section	The default values in this section are dependent upon whether the employee is W-2 or 1099.
FUI Exempt	Whether or not the employer is exempt from paying FUI for this employee.
OASDI Exempt	Whether or not the employer is exempt from paying OASDI for this employee.
Medicare Exempt	Whether or not the employer is exempt from paying Medicare for this employee.

Field / Button	Description
W-2 Form section	
Type	Type of tax form being filed if not W-2; select from the dropdown list.
Residential State	State for which tax forms are being filed as the employees' residence.
First Name	Legal name for whom all tax forms will be prepared – complete only if different from the information on the Basics tab.
Middle Name	
Last Name	
Name Suffix	
W-2 Settings section	
Deceased	Status is designated on the Form W-2 as deceased.
Statutory Employee	Status is designated on the Form W-2 as statutory.
Legal Rep	Is there a Legal Rep designated on the Form W-2?
Deferred Comp	Are these earnings designated as deferred compensation on the Form W-2?
Pension	Are these earnings from a Pension plan?
1099-R section	
Distribution Code	If a pension distribution was taken, this is the distribution code reported on the 1099-R.
Tax Amount Determined	Was there a tax amount determined and reported on the 1099-R?
Total	Was the distribution a total distribution of all assets in the pension plan?
Pension Plan	The type of pension plan reported on the 1099-R.

Employees - State screen

Field / Button	Description
County	County within the state selected.
Salary Type	Select the salary type for the employee, if applicable.
Calc SUI Taxable 1099 Wages checkbox	If selected, the SUI taxable wages for this employee are calculated for the state.
Work at Home	For PA only.
Tax Code	This is a generic code and can be used to add details needed for returns.
Reciprocation section	
Method	Reciprocal method – select from the dropdown list.
State	Select the state with whom the residential state has the reciprocal agreement – the states listed are those the company sets up to do business with.
Amount / Percentage	Amount required to reciprocate; used based on Reciprocation Method.
EE Tax Status section	
Employees – State screen	Employees – State screen
State Tax	Employees' state tax status. Select from the dropdown list whether the employee's tax is to be included, blocked or exempted.
SDI Exempt	Whether or not the employee is exempt from SDI.
SUI Exempt	Whether or not the employee is exempt from SUI.
ER Tax Status section	
SDI Exempt	Whether or not the employer is exempt from paying SDI for this employee.
SUI Exempt	Whether or not the employer is exempt from paying SUI for this employee.
Overrides section	
Tax Type	Tax type to be overridden.
Amount / Percentage	Amount of the override.
Minimum Wage	Does the override revert to minimum wage?

Employees - Local screen

Field / Button	Description
Column Headings	
Local	Local tax added at the Company level.
State	State in which the local agency resides.
County	County in which the local agency resides.
Local Type	Employee or employer tax.
Tax Rate	Tax rate entered at the system level for the local tax.
Misc Amount	The amount used to adjust the percentage of state taxes when that calculation method is used.
Tax Code	Used only if an additional tax code is necessary.
Active	Whether or not the local tax is currently active.
Tax Status	Should the local be included, blocked, or is it exempt?
Deduct Behavior	Should the tax be always deducted, never deducted, or are there no overrides?
Work Address Location	PA only.
Overrides section	
Pre-tax Deductions	Does the taxable wage base used to calculate local taxes include pre-tax deductions?
Tax Type	Tax type of the overridden tax, if any.
% of Taxable Wages	The percentage of taxable wages used to calculate local taxes.
Tax Value	If an Override Tax Type is entered, this field is required.

Employees - Child Support screen

Field / Button	Description
Priority	Priority in order of all Scheduled E/Ds – Child Support usually has number 1 priority over all other E/Ds.
Case #	Case number assigned by the Child Support agency.
State Origin	The state in which the Child Support Order originated.
Medical Eligible	This field is pre-filled from the **Healthcare Coverage** field value on the Employees – Basics screen.

Field / Button	Description
Agency	Child Support Agency responsible for collecting the money for payment.
Arrears	Change to **Yes** if Child Support payments are in arrears on this case.
FIPS	Five-digit Federal Information Processing Standard (**FIPS**) code (**FIPS** 6-4) that identifies counties and county equivalents in the United States.
Custom Field	If the company has established a custom field to help with tracking.

Employees - Direct Deposit screen

Field / Button	Description
ABA#	Routing number identifying the financial institution.
Bank Account#	Number of the account to which deposits are made.
Account Type	Type of account to which deposits are made.
Branch Identifier	Bank Identifier used when transferring money and wiring money.
Addenda	Additional information (if any) to be added to the direct deposit instructions.
In Pre-Note	Is the direct deposit within the period of validating the account credentials?
Form on File	Tracks whether or not there is a Direct Deposit Authorization form on file.
Allow Hyphens	Yes means hyphens are allowable characters in the bank account number.

Employees - Scheduled E/Ds screen

Field / Button	Description
Basic tab	
Code	E/D Codes assigned at the system level – select from the dropdown list.
Description	Entered automatically when the E/D Code is selected.
Priority	Priority to process the Scheduled E/D (Child Support E/Ds are always Priority 1).
Calculation Link	Select an E/D Group that the Scheduled E/D belongs to (if applicable).
Calculate Using	Select which calculation method will be used to calculate payroll deductions for the Scheduled E/D. There are three options: 1. Use the calculation method that has been defined for the E/D 2. Use the calculation method defined at the Company Benefit level. 3. Use the calculation method defined at the Employee Benefit level.
Calculation Method	Method used to calculate deductions from payrolls. Select the method from the dropdown list. **Amount $** - If the Calculation Method selected is a fixed dollar amount enter that amount. **Amount %** - If the Calculation Method selected is based on a percentage enter the percentage amount.
E/D Group	Select an E/D Group if the Scheduled E/D is included in an E/D Group.
Note: Earnings must be set up as a member of an E/D Group, which simplifies the calculation of earnings such as 401(k)s.	
Always Pay / Deduct	Offers flexibility to override E/D, similar to Blocking Week 1 - 5 **All payrolls** - earnings are paid whether or not there are earned wages for the employee; deductions are tracked to be taken from the next payroll. **Current Payrolls** - the E/D is applied to the current the payroll whether or not there are earned wages for the employee. If deduction exceeds amount in check the amount is not tracked to be made up later. If there are insufficient earnings for the deduction, the Scheduled E/D is processed based on the selection in the **Deductions to Zero field**. **No** - if the employee has no wages in a payroll cycle, the system does not pay/deduct the E/D, nor is it tracked it to be made up later.
Important: to ensure that the remainder of the deduction is taken out of a subsequent pay cycle, the Make Up Deducts Shortfall field on the Client - E/Ds - Details tab must be set to Yes.	

Field / Button	Description
Deductions to Zero	Defaults to the Deductions to Zero Default field on the Client - E/Ds - Scheduled Defaults tab. It can be overridden here by E/D, by employee, and instructs how much of a deduction should be taken if there is not enough to take the entire amount. This does not turn Shortfall / Deduction not Taken makeup on or off. It only tells the system whether or not to take partial amounts for deductions. **Yes** - the entire amount is deducted, until the check is zero. If there is shortfall it may be either a portion of or the total amount of the Scheduled E/D. **No** - a deduction is taken only when there are sufficient funds to take the whole deduction. If there are insufficient wages, the created shortfall is always the total amount of the Scheduled E/D. If there is a pre-existing shortfall, it takes the shortfall amount only when there are sufficient wages to take the whole amount. When there is a deduction and a pre-existing shortfall, and there are sufficient wages to take the shortfall but not all of the deduction, Evolution takes the shortfall, but not the deduction.
Deduct Whole Check	Value selected defaults based on the setting applied on the Client - E/Ds - Scheduled Defaults tab **Yes** - deducts the net check (use for direct deposits). **No** - deducts a portion of the check.
Send To*	Select Agency or Client, Company, or Direct Deposit.
Reference to Display on Check	If being sent to Agency or Client/Company on behalf of the employee…
Schedule tab	All payment schedule-related information is on this screen.
Starting	Starting date for the scheduled deduction.
Ending	Ending date for the scheduled deduction.
Affects section	
Payrolls affected	Identify which payrolls are affected by the deduction.
Frequency	How often the deduction of the Scheduled E/D occurs.
Blocks section	
Block Based On	If there are blocks on any of the payroll weeks identify whether it is custom defined or being blocked to keep the deduction at four weeks per month.
Weeks Blocked	Identify which, if any, week(s) is blocked from having the deduction taken

Field / Button	Description
Limits tab	
E/D Group	E/D Group to which the minimum Scheduled E/D belongs (same as **Minimum E/D Group** field on the Employee – Scheduled E/Ds – Advanced tab).
Pay Period %	Minimum percentage (if the deduction is quoted as a percentage) to be taken per pay period.
Pay Period $	Minimum dollar amount (if the deduction is quoted as an amount) to be taken per pay period.
EE Annual $	Maximum dollar amount the employee is allowed to contribute per year.
Client Annual $	Maximum dollar amount the client can contribute per year for the employee
Maximum Averages section	
Amount E/D Group	This information is used for special Union dues calculations.
Hours E/D Group	
Hourly Rate	
Thresholds tab	
Action	These fields refer to the goal amounts at which deductions stop – the same information entered on the Employee – Scheduled E/Ds Advanced tab in Evolution.
Remaining	
Balance Taken	
Amount $	
Thresholds section	
E/D Group	

Appendix 3: Templates and Alerts

Create a Template for use in an Alert

Follow these steps to create a template for use in an Alert in Advanced HR.

Step	Description
1.	From the Advanced HR Home page, click the Communications menu item, navigate to **Communication – Templates**.
2.	Click **Add**.
3.	Enter "Happy Birthday!" as the **Template Name**.
4.	Select "Letter Template"as the **Category**.
5.	Chose "Personal Info" as **Select Form**.
6.	Under **Fields in Form**, check the following [First Name]
7.	In the **Message**, enter the following text around your form field: Dear [First Name], Wishing you a very Happy Birthday! We all hope that you enjoy your day. Stop by Bob's office to pick up your bag of money. Sincerely, Human Resources and the whole team
8.	Click **Save**.

Create a "New Hire!" alert

Create a New Hire Alert in Advanced HR to be sent to IT, Finance, and managers in the company to ensure that the new hire has all of their equipment, workstation, and training times setup for their hire date.

Step	Description
1.	Navigate to **Communication – Alerts.**
2.	Click **Add**.
3.	Select **Event Based Alert** as the **Alert Type**.
4.	Add "New Hire" as the **Title**.
5.	If a New Hire Letter template exists, select this in the **Template** drop-down menu.
6.	Leave **Field Change Alert** blank.
7.	Leave **Status Change Alert** blank.
8.	Select **New Hire Alert**.
9.	**This Alert Applies to**: Select the positions this alert will apply to only in a Position Enabled Company.
10.	**Send To :** Select **Select Individuals**.
11.	Select **By Criteria** to **Begin Sending Alerts**.
12.	Select **Email** as the **Send This Alert To:** from the drop-down menu.
13.	Click **Save**.

Create an Email/Letter template

Follow these steps to create an email/letter template in Advanced HR.

Step	Description
1.	From the Advanced HR Home page, click the Communications menu item, navigate to **Communication – Templates**.
2.	Click **Add**.
3.	Enter “Driver's License Information Update Request” as the **Template Name**.
4.	Select “Letter Template”as the **Category**.
5.	Chose “Personal Info” as **Select Form**.
6.	Under **Fields in Form**, check the following: [First Name] [Driver's License State] [Driver's License Number] [Driver's License Expiration]
7.	In the **Message**, enter the following text around your form fields: Dear [First Name], We have the following driver's license on record for you: [Driver's License State] [Driver's License Number] [Driver's License Expiration] Please take the time to make sure this information is accurate. If it is not, please update your license data that we have on record by March 31st, 2016. Thanks! Human Resources
8.	Click **Save**.

Your new template will be available as a **Template Name** in **Communication – Alerts** and **Select Template** in **Communication – Messages**.

Additional settings specify whether individual users have full access, read-only access, or no access.

1. Go to the **Admin – Security – Users** (or Groups) screen, and select the user.
2. Click the **Details** tab - **User Rights** button.
    - Modify settings by right-clicking the **green plus sign / red minus sign**, and selecting **Enabled** or **Disabled**.
    - Click the small **plus signs** (far left) to open a menu ‘tree’. Everything can be selected individually to give or remove permissions to users.
3. Click the black plus sign next to Employee to open related topics.
4. Right-click the item to be changed from standard group rights.

Appendix 4: Advanced HR standard reports

The following is a list of the Advanced HR standard reports.

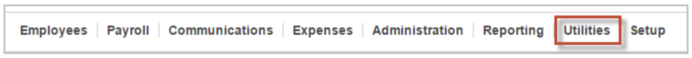
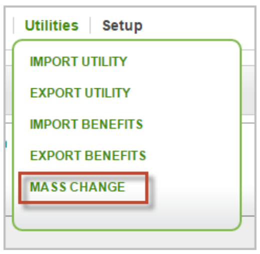
- Approved Expenses Report
- Current Benefit Elections
- EEO Non-Fileable Info
- EEO Utilization Analysis Report
- EEO1 Report
- Emergency Contacts
- Employee Directory
- Employee OE Health Benefit Cost
- Employee Roster
- Employees Assets
- Employees Class Code Eligibility
- Employees Demographics
- Employees Hired/Term
- Employees OE Census
- Employees Roles
- Employees Years of Service
- Future Benefit Elections
- Open Enrollment Employee Election
- OSHA300 Report
- VETS-100 Report
- Withholding

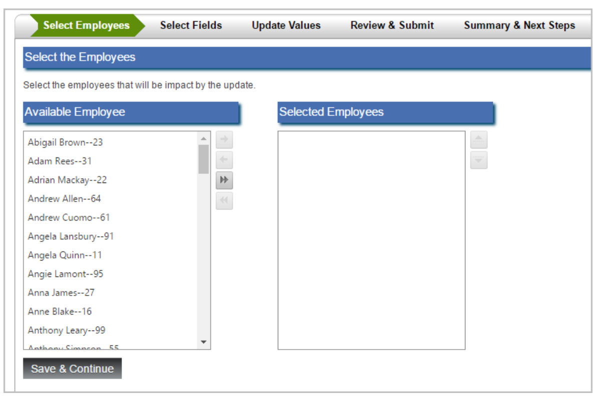
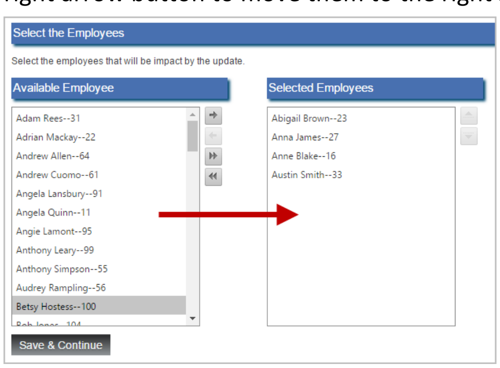
Appendix 5: Using the Mass Change utility

You can use the Mass Change Utility to make changes in bulk to multiple employees individually one at a time or to an employee group all at once.

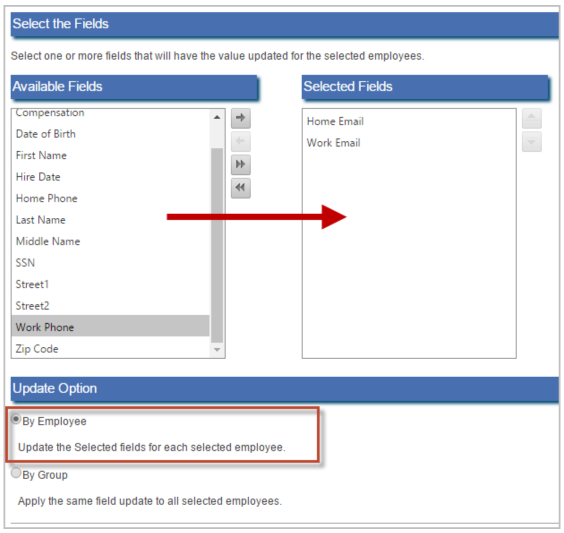
Using Mass Change - by employee

Follow these steps to use the Mass Change utility by employee method. For example, to update the Home and Work email address for selected employees individually.

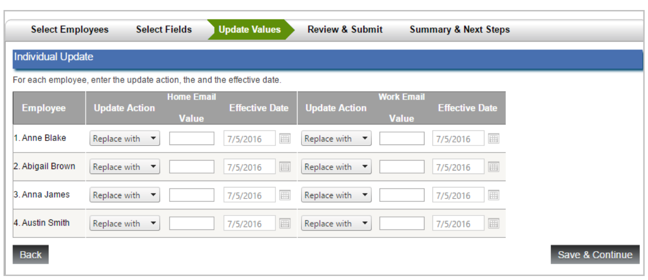
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>From the Advanced HR Home page, click the Utilities menu item.

</td></tr>
<tr><td>2.</td><td>On the Utilities menu, click the Mass Change menu item.


Result: The system displays the Mass Change screen.

</td></tr>
<tr><td>3.</td><td>Select the employees to be updated. Select each employee on the left side of the screen and click the right arrow button to move them to the right side.

</td></tr>
</table>

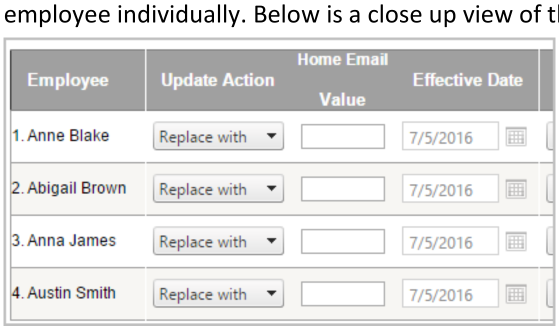
Step	Description
	TIP: You can quickly select & move all the employees on the left side of the screen to the the right side of the screen by clicking the double left arrow button .
4.	Click the **Save and Continue** button. Result: The system displays the **Select the Fields** screen.
5.	Select the field(s) to be updated for the selected employees and click the right arrow to move the field(s) to the right side of the screen. For example – Home & Work Email.



Step	Description
6.	In the **Update Option** section at the bottom, select **By Employee** and then click the **Save & Continue** button. Result: The system displays the **Update Values** screen.



Step	Description
7.	You can now update the field values (Home Email & Work Email address for example) for each employee individually. Below is a close up view of the Home Email update field section of the screen:



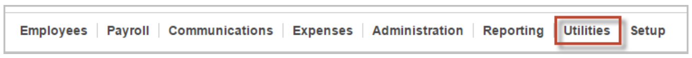
Step	Description
8.	Click the **Save & Continue** button.

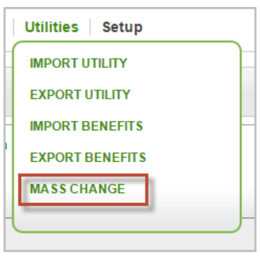
Step	Description
9.	You can then Review the information one last time before you **Submit** the changes.

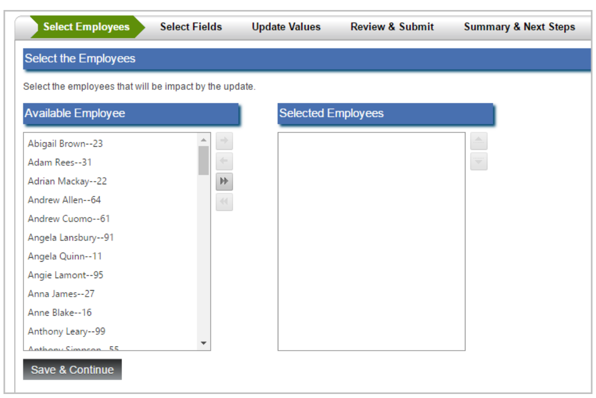
Using Mass Change - by group

The Mass Change utility By Group method allows the user to select whichever employees they choose and update a field or fields for all of the employees at one time. For example, let's assume that multiple employees were originally entered with a city name of Shelburne but they were actually located in Bennington. You could use the Group method to select the employees and enter the value for the correct city, updating all of those employees at one time.

Follow these steps to use the Mass Change utility by group:

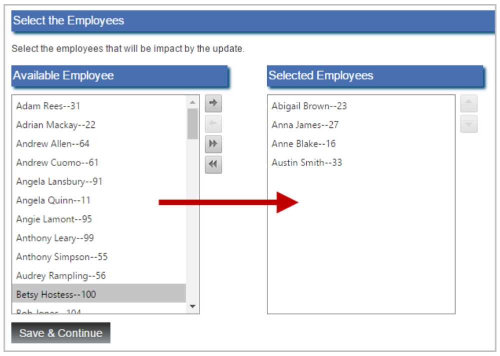
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1.</td><td>From the Advanced HR Home page, click the Utilities menu item.


</td></tr>
<tr><td>2.</td><td>On the Utilities menu, click the Mass Change menu item.


Result: The system displays the Mass Change screen.


</td></tr>
<tr><td>3.</td><td>Select the employees to be updated. Select each employee on the left side of the screen and click the right arrow button to move them to the right side.</td></tr>
</table>

Step **Description**

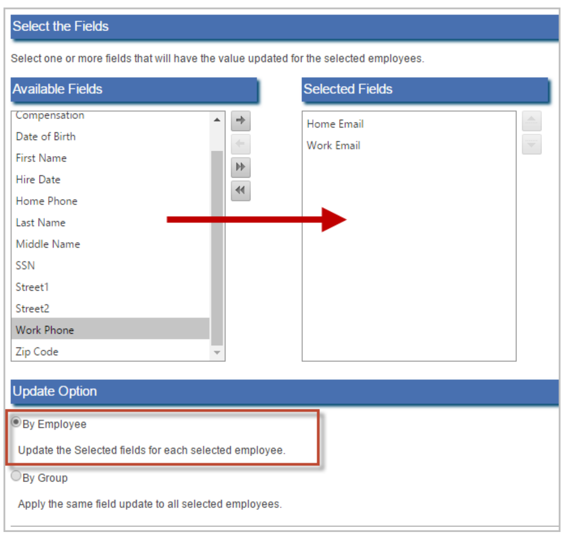


TIP: You can quickly select & move all the employees on the left side of the screen to the the right side of the screen by clicking the double left arrow button.

4. Click the **Save and Continue** button.

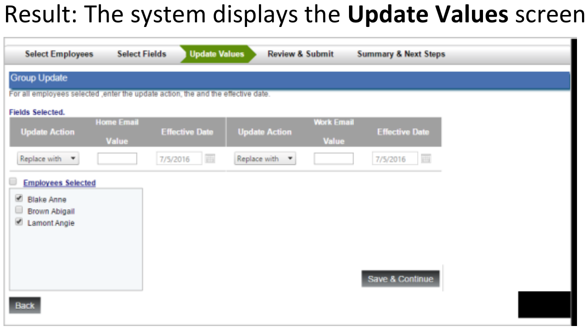
Result: The system displays the **Select the Fields** screen.

5. Select the field(s) to be updated for the selected employees and click the right arrow to move the field(s) to the right side of the screen. For example – Home & Work Email.



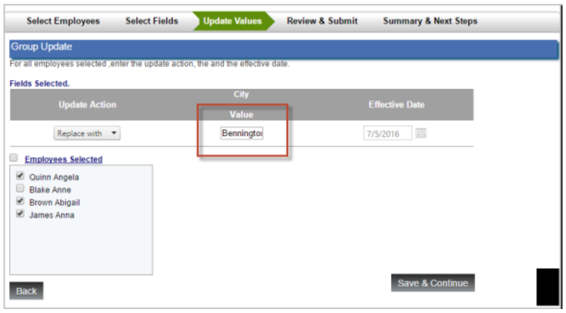
6. In the **Update Option** section at the bottom, select **By Group** and then click the **Save & Continue** button.

Result: The system displays the **Update Values** screen.



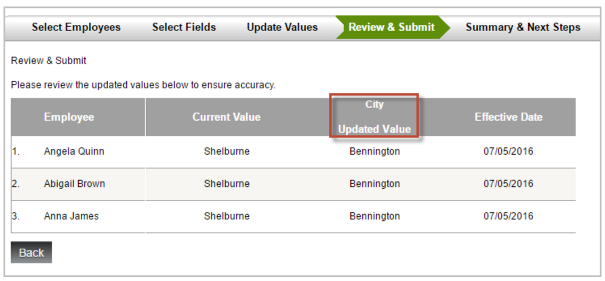
Step	Description

7. In the **Value** field, enter the updated value and then select which employees to update with this value by clicking the check box next to each employee name, or click the **Employees Selected** option to select all the employees.



In our example, we entered the City value (Bennington) that we want to update the group of employees with all at once.

8. Click the **Save & Continue** button.



9. You can then Review the information one last time before you **Submit** the changes.