

Getting Started: Employee End User Guide

Advanced HR 2.0



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Document Revision History

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1.0	2.0	9/16/2017	DRAFT in progress
1.1	2.0	10/4/2017	Added overview of SSO.
1.2	2.0	10/30/2017	Added accessing Evolution Payroll from Advanced HR and new vocabulary terms, and list of features.
1.3	2.0	12/28/2017	Add Pay Stub menu option description. Added My Benefits and Open Enrollment menu items on the My HR tab – My Benefits section.
1.4	2.0	1/9/2018	Added more information to the Direct Deposit section.
1.5	2.0	1/18/2018	Added My Payroll – My Tax Form menu option.
1.6	2.0	2/9/2018	Added Logging in and Logging out sections.
1.7	2.0	2/27/2018	Added mention of date-based notifications that can appear for employees on their Company Dashboard.

Audience and Additional Advanced HR 2.0 Documentation

The intended audience for this guide is the client end users of the Service Bureau. It contains information about how to use Advanced HR 2.0 from the employee point of view.



User Guide

Additional information concerning related Administrator functions can be found in the following separate Advanced HR 2.0 User Guides:

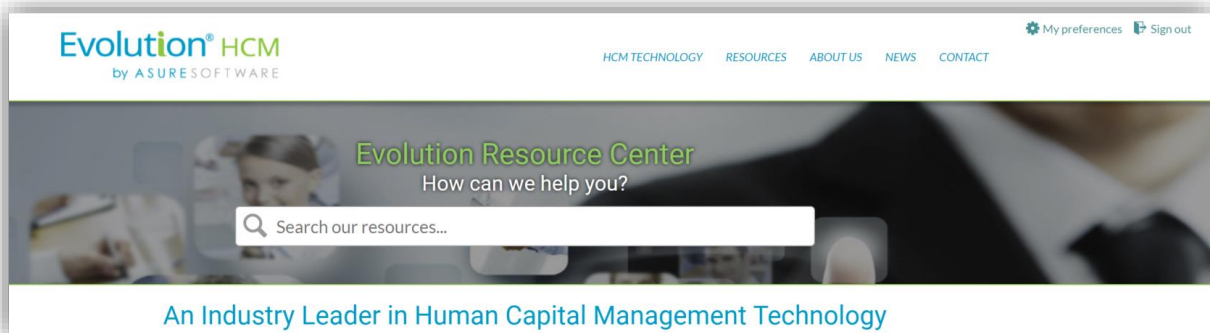
- *Advanced HR 2.0 Administrator Guide*
- *Advanced HR 2.0 Security Guide*
- *Advanced HR 2.0 Customizing Security Roles/Users Guide*
- *Advanced HR 2.0 Single Sign On Guide*
- *Advanced HR 2.0 Benefits Guide*
- *Advanced HR 2.0 Reporting Guide*
- *Advanced HR 2.0 New Employee Onboarding Guide*
- *Advanced HR 2.0 Applicant Tracking Guide*
- *Advanced HR 2.0 Implementation Guide*

Evolution Resource Center

You can go to the Evolution Resource Center at <https://support.evolutionhcm.com> to view the latest Advanced HR 2.0:

- Training Guides
- User Manuals
- Instructional Videos
- Implementation Center materials

Your comments are important to us. You can enter your feedback directly online for any specific articles/topics in the **Evolution Resource Center**. We encourage you to tell us what you like, or what you would like changed about Evolution documentation and training materials. We are committed to continually improving our product documentation for you.



Evolution Resource Center

You can also:

Email our Support Department for questions:

support@evolutionhcm.com or by calling 802-655-8347

Email our Training Department to schedule a training:

Training@evolutionhcm.com

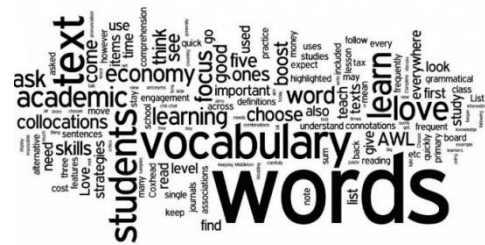
Email our Implementations Team:

AHR_implementations@asuresoftware.com

Welcome to your Advanced HR Getting Started: Employee End User Guide! The following sections provide details on how the Employee Self Service aspect of Advanced HR 2.0 functions. For information about how to set up and configure Advanced HR 2.0, refer to the *Advanced HR 2.0 Administrator Guide*.

- A New Vocabulary
- Basic Navigation
- My Payroll Menu
- My Benefits Menu
- My HR Screen
- My Employment Summary Menu
- My Personal History Menu
- My Miscellaneous Menu

As with any new product, Advanced HR 2.0 introduces some new terms that you should become familiar with.



3/21/2018

Term	Description
Application Version	Part of the Applicant Tracking system, before a job can be posted, the user must first create an Application Version. An Application Version is a set of parameters that can be created, titled, saved, and attached to any number of Job Postings, thus streamlining the process.
Base Admin Role	When a user who has been assigned a Base Admin signs in, as with any other role, they will be taken to the Dashboard. The Dashboard for a Base Admin is similar to the Base Manager but also contains additional menu items and functionality. This role is most likely the highest end user role you (the Service Bureau) will assign at the client level.
Base User Role	The Base User role is what every user should be set to. When a user who has been assigned a Base User signs in to Advanced HR 2.0, they are taken to the Dashboard. Note: For a Base User, the Dashboard will display their own information only.
Clone a Role	Administrators have the ability to clone a security role and associate it to a specific company. The term 'clone a default role' is more accurate than to refer to 'copying' a role. When you clone a default base role, it is assigned to that specific company. Using this method, you can make changes and add or remove permissions to the default security roles for a specific company but still leave the original default security roles unchanged for other, new clients.
Compensation	This menu option displays the employee's Primary Rate or Salary amount.
Dashboard	The Dashboard functions as the employee portal. This will allow any employee access to their personal information in Advanced HR 2.0.
Job Posting Key	This is the URL that you can place on job boards in order to direct applicants to the application in Advanced HR 2.0. This is also where you can control the status of a posting by toggling the status to No or Yes .
Payroll Cutover	Formerly known as Company Onboarding in Advanced HR v1.0. This is the initial load of data that comes from Evolution to Advanced HR 2.0. The company must exist and have a Status of Active in Evolution Classic in order to perform the Payroll Cutover process.
Permissions	Permissions in Advanced HR 2.0 allow the Service Bureau Admin or the Super Admin user to set security authorization for different Resource functionality. Advanced HR 2.0 comes by default with thousands of Permissions right out of the box. These Permissions are divided into the following categories: Form, Control, Menu Items, and Database. Permissions can be role based and/or user based.

Term	Description
Resources	<p>In Advanced HR 2.0, every clickable item in the system is known as a Resource. The default security roles allow different levels of access to these resources. To change a security role to restrict or to allow access to a Resource, the service bureau will need to set the Permission on the Resource itself.</p> <p>Resources are what the user is giving (security) Permissions to (see Permissions above).</p>
Self-Service Setup	An HR Admin menu option that allows for multiple employees to be given access to Employee Self-Service. This will create users for all selected employees and attach the user to the Employee Record.
Service Account User	The Service Account User is a non-user account in Evolution Classic for the purpose of enabling Single Sign On (SSO) access. This is the Integration User.
Service Bureau (SB) Admin Role	The Service Bureau Admin (SB Admin) is a step below the Super Admin level of access. The functionality for the SB Admin user level is geared more toward the administrative side. The primary difference between a Service Bureau Admin and a Super Admin is the Service Bureau Admin users can be excluded from accessing specific companies – such as when they are responsible only for certain companies, or should not see specific companies (such as the Service Bureau’s home company).
Single Sign On (SSO)	Single Sign On (SSO) allows the user to login to a central location and access both Evolution Payroll and Advanced HR 2.0. With this functionality, which is part of the ‘Stowe Release’ of Evolution Classic, a user logs in with a single ID and password to gain access to both Payroll and Advanced HR 2.0 without using different usernames or passwords. It is important to note that Single Sign On (SSO) functionality is for those users who need to access Evolution Payroll functions AND Advanced HR 2.0 functions. For those users who only need Advanced HR 2.0 access, they will login as normal, and do not need SSO functionality.
Super Admin Role	Super Admins are the highest level of security role. Super Admins have access to all of the clients associated with an account in Advanced HR 2.0. Super Admins also have the ability to Exclude companies from users.

List of Features ‘Out of the Box’ in Advanced HR 2.0

The following is a list of the basic features available 'out of the box' in Advanced HR 2.0. It's important to note however, that the Service Bureau will need to perform some initial set up on the Evolution Classic side, as well as, in Advanced HR 2.0.

- Self Service Onboarding
- Applicant Tracking
- Employee Self-Service
- Manager Self-Service
- Employee Maintenance
- Notifications
- Evolution Single Sign On (SSO) functionality
- Data Import Tool and Data Migration Tool



Evolution Single Sign On (SSO)

Evolution Single Sign On (SSO) allows the user to easily access both Advanced HR 2.0 and Evolution Payroll. With Evolution Single Sign On functionality, a user can login with a single username and password to gain access to both Payroll and Advanced HR 2.0 without using different usernames or passwords.

As we continue to update the product lines, Single Sign On will also be rolled out for different products in the future. As with many updates to functionality, SSO does require some pre-work before it can be utilized. Most important of these, Evolution Classic must be upgraded to the “Stowe” version.

There are preliminary steps that need to take place, but once SSO is enabled by the Evolution IT Department, and the user signs in, the service will authenticate the end user for all the applications the user has been given rights to. This will also eliminate the need for further prompts when the user switches applications during the same session.

Note the following about the Single Sign On feature:

- Provides access to two or more systems
- Once turned on, it is on for ALL users and becomes the new login screen
- Requires some pre-work before it can be enabled
- Requires the Service Bureau to be at the “Stowe” version of Evolution Classic
- User Email Addresses are required for all users when Single Sign On is turned on. The employees email address should be entered into Evolution Classic prior to the Payroll Cutover.

Evolution® HCM
by ASURE SOFTWARE

A screenshot of the Evolution HCM Sign In interface. It features a white background with a light gray border. At the top, the text "Sign In" is centered. Below it, there are two input fields: "Username" and "Password". The "Username" field has a small icon of a person inside a box. The "Password" field has a small icon of an eye. Below the password field is a blue button with the text "SIGN IN" in white. At the bottom, there is a link that says "Forgot Password?".

Users and their security roles can be created and assigned in Advanced HR 2.0. However, with the introduction of SSO, you will be able to create users with payroll access in Evolution Classic as well.

Note: It is important to note that Single Sign On (SSO) functionality is for those users who need to access Evolution Payroll functions AND Advanced HR 2.0 functions. For those users who only need Advanced HR 2.0 access, they will login as normal, and do not need SSO functionality (although they also use the new login screen).

Single Sign On and Security Roles

Access and functionality in Advanced HR 2.0 is dependent on a user's Security Role. In Advanced HR 2.0, there are four end-user security roles:

End User Roles:

- Base User Anonymous
- Base User
- Base Manager
- Base Admin

There are also two security roles that are primarily designed for the back-end Service Bureau user:

Back End (SB) Roles:

- Super Admin
- Service Bureau Admin

For the purposes of this Self Service User Guide, we will focus on the role of the **Base User**.

Logging On to Advanced HR 2.0

Advanced HR 2.0 requires all users to have a unique username and a password. For Advanced HR and Evolution Payroll, we have implemented a Single Sign On, or SSO, to allow users to experience greater ease and functionality. SSO however, will require some initial setup:

- The Username and Password for Evolution Payroll and Advanced HR 2.0 must match.
- The Username must be a valid, unique email address. Update user email addresses in the **Admin - Security - Users - Details** tab in Evolution Classic.
- The SSO feature must be activated by the Evolution IT department to function for your service bureau.

When the user goes to either Evolution Payroll or Advanced HR 2.0, they will be automatically redirected to the new SSO Login page.

Evolution® HCM
by ASURE SOFTWARE

Sign In

Username
will

Password

SIGN IN

Forgot Password?

To access either Advanced HR 2.0 or Evolution Payroll, if applicable, the user will now be taken to the SSO Login Screen.

Using their Evolution credentials they'll be able to login and access both systems.

Once they login successfully, the user can easily switch between Advanced HR 2.0 and Evolution Payroll.

Usernames

In order to use Advanced HR 2.0, all employees must have an email address which serves as the **username**. This ensures that all users have a unique username and can receive email communication through Advanced HR 2.0.

Passwords

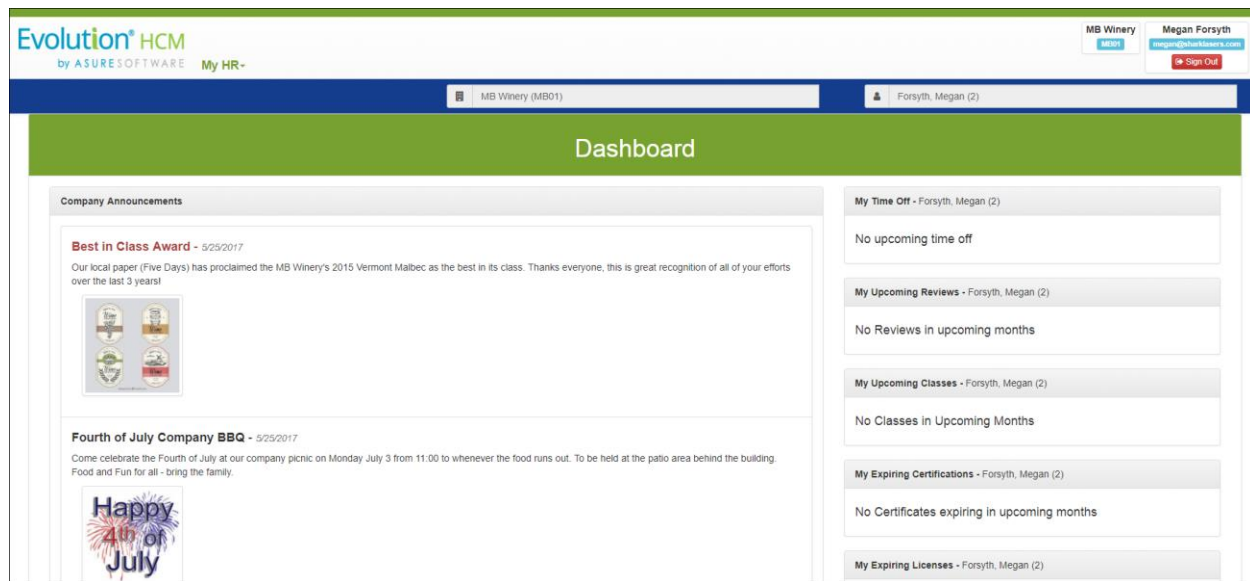
Passwords for Advanced HR 2.0 must include at least one number, one non-alphanumeric character, one uppercase and one lowercase character, and contain between 7 and 30 characters.

Basic Navigation and My HR Screen

Let's start with the basic navigation process in the Advanced HR Employee Self Service (**My HR**).

Dashboard

The **Company Dashboard** is what the users see when they first login to Advanced HR 2.0. The Company Dashboard presents any company announcements and links to important documents. The following Dashboard is a sample only; your Dashboard will look different.

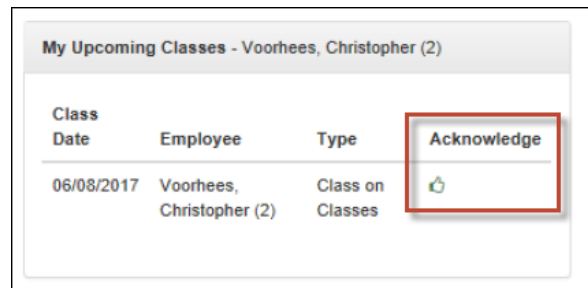



Advanced HR 2.0 Employee Self Service Dashboard

The specific look of the Dashboard will vary depending on your company and your assigned level of access (security level). Additional options to display on the Dashboard to employee self service (Base) users are upcoming reviews, classes, and any expiring certification and license reminders. These are set by the administrator.

In addition, Base Users can Acknowledge:

- Employee reviews
- Training Class enrollment
- Expirations



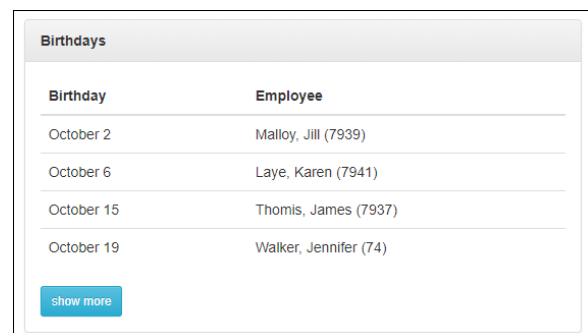
When Base Users click an **Acknowledge** icon  displayed on the Dashboard, that will generate an email to the user and optionally to their supervisor or other specific acknowledgement list.

Once a license renewal or upcoming review is acknowledged by the employee, the icon will no longer display.

The Dashboard can also display any upcoming birthdays.

Administrators can control which items appear on the employee's Dashboard (landing page) on the **HR Admin – Company – Home Dashboard Setup** page.

It's important to note that in order to access their

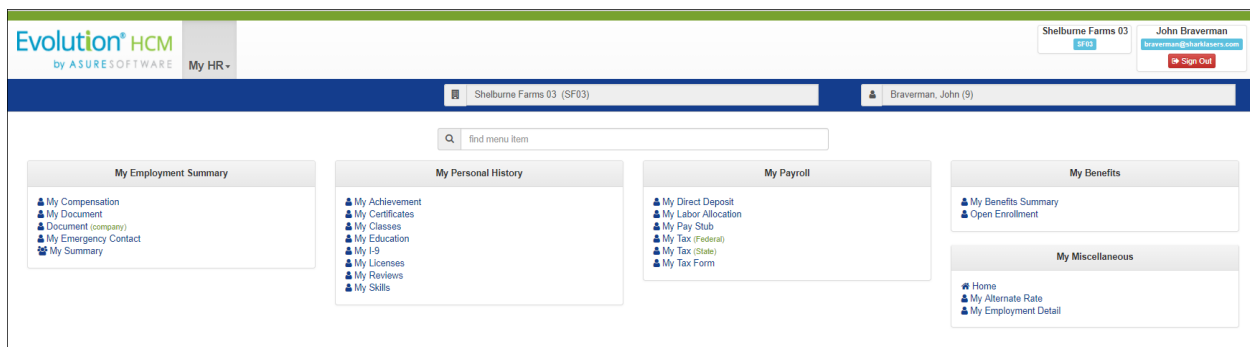


own company Dashboard, an employee has to be a user in addition to being an employee. If an employee is not a user in the system, when they try to login they will only see a blank Dashboard.

Note: Base Managers, with regards to employee Birthdays and Anniversaries, License Expirations, and Scheduled Reviews, will only view the employees that are assigned to them. However, **Base Admins** will see all employees in the company.

My HR

Click on the **My HR** link in the upper-left of the screen (above the Dashboard) to display the **My HR** menu options to access all of your HR and payroll data. The menu options appear on a popup screen overlaying the Dashboard.



My HR Menu screen

My HR Menu Categories

The **My HR** screen displays a number of sub-menu panes or tiles, each with links to screens where you can get more detail about your HR and Payroll data. The **My HR** sub-menus are organized into the following general categories:

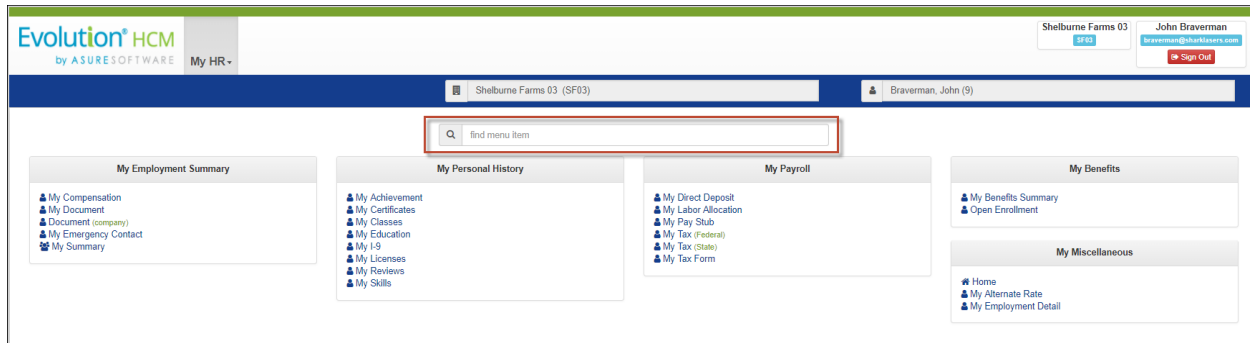
My HR Menu Category	What You Can Do
My Employment Summary 	Display information concerning your compensation, your documents, general company documents, emergency contact information, and a summary screen listing name, address, email, and telephone number information.

My HR Menu Category	What You Can Do
<p>My Personal History</p> <div> <p>My Personal History</p> <ul style="list-style-type: none"> My Achievement My Certificates My Classes My Education My I-9 My Licenses My Reviews My Skills </div>	<p>Display information about your achievements, classes, education details, licenses, skills list, performance reviews, and I-9 information, if applicable.</p>
<p>My Payroll</p> <div> <p>My Payroll</p> <ul style="list-style-type: none"> My Direct Deposit My Labor Allocation My Pay Stub My Tax (Federal) My Tax (State) My Tax Form </div>	<p>Display payroll information including any deductions, direct deposit information, labor allocation details, pay stubs, and Federal and State taxes, and electronic tax forms: EE W2 Electronic Copy, EE 1095B Electronic Copy, EE 1095C Electronic Copy, and 1099-Misc.</p>
<p>My Benefits</p> <div> <p>My Benefits</p> <ul style="list-style-type: none"> My Benefits Summary Open Enrollment </div>	<p>Display a summary of your current benefit elections and links to the open enrollment process, if applicable.</p>
<p>My Miscellaneous</p> <div> <p>My Miscellaneous</p> <ul style="list-style-type: none"> Home My Alternate Rate My Employment Detail </div>	<p>Links to display miscellaneous information such as an alternate rate, employment detail information, and veteran status, if applicable. Also contains a Home link to return to the Dashboard.</p>

Note that, depending on your security role, you may have read-only access to all or most of the **My HR** screens. You may have the ability to change information for selected screens only as set by your system administrator.

Using the My HR Screens

Click on a menu item on the **My HR** screen to display the corresponding screen. If you are unsure where to start, you can simply type what you are looking for in the **find menu item** search field in the center of the screen.



As you start typing a word, Advanced HR will intuitively search as you type, refreshing the options displayed on the menu screen to reflect what you type.

For example, if you stop typing the word “document” at “do”, Advanced HR 2.0 will present both “My Document” and “Document” as they are the only menu options containing that specific string of letters.



Summary and Detail Screens

Once you click on a specific **My HR** screen menu option, for example – **Documents**, you will be presented with a summary of any data within that option. In the following example, you see the **Documents** summary screen showing the MB Winery Company Handbook and the Holiday Schedule. You can download the document by clicking on the document icon in the **Download** column, highlighted in the following screenshot.

Summary Screen

Documents (company)						
Download		filter grid...				
Download	Filename	Category	Title	Upload Date	Size (KB)	Upload By
	MB Winery Company Handbook.pdf	HR Dept. Document	Company Handbook	05/25/2017 03:58 PM	2507	mblake@evolutionhcm.com
	MB Winery Holiday Schedule.docx	HR Dept. Document	Holiday Schedule	06/09/2017 09:22 AM	11	mblake@evolutionhcm.com

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The **My Documents** and **My Documents (company)** screens allow you to download the actual document by clicking on the document icon to the left of the document filename on the screen. An example of a PDF download icon is shown at right. Note that the document icon will vary depending on the type of document it is (Word, PDF, video file, etc.).



Detail Screen

If you click on any role on the summary screen, Advanced HR displays the detail screen with the specific information concerning that document.

Document: **MB Winery Holiday Schedule.docx**

<div>Employee</div> <div>Company</div> <div> MB Winery (MB01) </div>	<div>Category</div> <div>Category</div> <div>HR Dept. Document</div> <div>Title</div> <div>Holiday Schedule</div> <div>Description</div> <div>This is a list of the company's Holiday Schedule for 2018</div>
<div>Info</div> <div>Filename</div> <div>MB Winery Holiday Schedule.docx</div> <div>Size (KB)</div> <div>11</div> <div>Upload Date <small>Taskbar</small></div> <div>06/09/2017 09:22 AM </div> <div>Uploaded By</div> <div>mblake@evolutionhcm.com</div>	



At this point you can click on the blue **Prev Record** or **Next Record** buttons to view details of the other records, or you can close the screen and continue. All menu options work in the same manner.









Filtering Information

You also have the option of filtering long lists of records within each menu option. This works similar to the main menu search; however, you must either click the Enter key on your keyboard or click on the search filter icon (shown at right) to initiate the search and then type in your filter criteria.



Documents (company)  



  filter grid... 




Download	Filename	Category	Title	Upload Date	Size (KB)	Upload By
	employee_handbook.pdf	Handbook	Employee Handbook	05/08/2017 11:17 AM	704	shawn@hrnext.biz
	HOLIDAY SCHEDULE.docx	Company Information	2017 Holiday Schedule	05/08/2017 11:23 AM	11	shawn@hrnext.biz
	Letter from the CEO.pdf	Company Information	Letter from the CEO	05/08/2017 11:24 AM	1	shawn@hrnext.biz

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If you want to save information offline, you have the option of downloading a summary of any information presented in Advanced HR 2.0 by clicking on the **Download** link (shown at right). For example, on the **Taxes** screen below.



Taxes  

  filter grid... 

Actions	Tax Type	Code	Description	Filing Status	Primary Exemptions	Start Date	End Date
	SUI	CASDI-E	CA SDI - Employee	N/A	0	02/19/2016	12/31/2100
	SUI	CAETT	CA Edu & Training	N/A	0	02/19/2016	12/31/2100
	FED	FUTA	Fed Unemployment	N/A	0	02/19/2016	12/31/2100
	FED	SS	OASDI	N/A	0	02/19/2016	12/31/2100
	SUI	CASUI	California SUI	N/A	0	02/19/2016	12/31/2100
	SITW	CA	California SITW	N/A	0	02/19/2016	12/31/2100
	FED	FITW	Federal Income Tax	S	0	02/19/2016	12/31/2100
	FED	SS-R	OASDI - Employer	N/A	0	02/19/2016	12/31/2100
	FED	MED-R	Medicare - Employer	N/A	0	02/19/2016	12/31/2100
	FED	MED	Medicare	N/A	0	02/19/2016	12/31/2100

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Downloaded data will be presented in a basic Excel document which you can then save to your computer.





Tip: If you do not see the download, make sure on your Browser settings that pop ups are allowed; or that your pop up blocker is disabled. The specific name of this setting is Browser specific and can vary.



Adding or Changing Information

There are some [My HR](#) screens may that allow you to add or change information depending on your level of defined access. If you see the green **+ New** button displayed (shown at right), you will be able to add new records. If the **+ New** button is not displayed on a screen, this means you cannot make any changes.



Emergency Contacts  

   filter grid... 

Actions	Name	Employee ID	Contact Type	Contact First	Contact Last
	Oakley, Warren	275	Sister	Alexa	Smith
	Oakley, Warren	275	Mother	Barbara	Smith


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Clicking on the green **+ New** button will open a data entry screen. Note that all required fields in Advanced HR 2.0 are identified with a red asterisk as shown in the example to the right.

Last Name

Last Name 

Tip: If you do not enter all the required data, Advanced HR will let you know if you forgot to fill in a required field when you try and save the changes!

Contact: 

Employee

Company


iSystems Demo (ENDEMOVM)

Employee

Oakley, Warren (275)

Contact

Contact Type


Contact Type 

Contact Type is required

Priority

Priority


First Name

First Name 

Note that throughout Advanced HR 2.0, when you complete a field entry and move to the next field on a screen, the system marks the field with a green checkmark on the right side of the field (a sample is shown at right).

Type Info

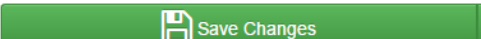
Code

PTO 

Description

Description

After clicking on a specific record you may see the green **Save Changes** and **Save & Next Record** buttons.



If you see the **Save Changes** and the **Save & Next Record** buttons display, this means you are allowed to change data contained in that record. Any fields that appear greyed out cannot be modified.

Tip: Don't forget to click **Save Changes** as Advanced HR 2.0 will *not* warn you if your changes have not been saved!

Information Icons

Some fields in Advanced HR 2.0 have information icons next to them – a blue circle with an “i”, shown at right and see the following example. When you hover the cursor over a field with an information icon, the cursor displays a question mark near the arrow. You can click on the information icon to get more Help information about that specific field.



Once you read the Help information, click on the information icon again to hide the Help text.

Access to Other Companies

Note: If a user has access to multiple companies, they will be able to use the **Company Search bar**, located at the top of every screen.

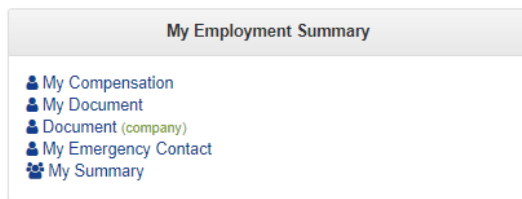


Simply start typing the company name and Advanced HR 2.0 will autocomplete the name, as long as you have access to it.

Now that you know how to navigate around Advanced HR 2.0, let's go through each individual menu item on the **My HR** tab to see what you can do!

My Employment Summary Menu

The **My Employment Summary** sub-menu of the [My HR](#) screen let's you choose from the following items:



Each item is discussed in the following sections.

My Compensation

You can view all of your current and historical compensation changes on the **My Compensation** screen.

Compensations 💰			
<div> Download filter grid... Advanced Filter </div>			
Effective Date	Pay Type	Pay Rate	Change Reason
08/14/2017	Hourly	10.00	
<div> Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1 </div>			



Clicking on a row in the summary screen displays the details screen for more information.




Compensation: Braverman, John; 8/14/2017




Employee Company Shelburne Farms 03 (SF03) Employee Braverman, John (9)	Compensation Info Effective Date 08/14/2017 Pay Type Hourly - Hourly Rate (Hourly or Salary per pay period) \$ 10.00	Other Info Change Reason Please Choose (represents BLANK) Comment Comment
--	--	--

My Documents (Employee)

You can view, print, save, and add documents to your “electronic personnel folder” using the **My Documents** screen.

Documents (employee)  

+ Add Documents   filter grid... 

Actions	Download	Filename	Category	Title	Upload Date 	Size (KB)	Upload By
		Megan Forsyth photo.jpg	Employee	Employee Photo	06/09/2017 10:05 AM	27	mblake@evolutionhcm.com
		Sommelier Certificate.pdf	EE License	Official Corkmasters License	06/09/2017 11:27 AM	88	mblake@evolutionhcm.com



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Don't forget to use the handy **filter grid** field to quickly search for specific documents!



filter grid... 

Simply enter at least two characters in the filter section and then click on the filter icon (shown at right) or press the Enter key on your keyboard. Advanced HR will filter all columns to locate records with the stipulated search criteria.



Documents (employee)  



+ Add Documents   ba 


Actions	Name	Employee ID	Download	Filename	Category	Title	Upload Date 	Size (KB)	Upload By
	Oakley, Warren	275		formbackgroundcheckauth.pdf e-signed by: Warren Oakley on 05/08/2017 11:29 AM	Onboarding-Background Check Auth	FormBackgroundCheckAuth	05/08/2017 11:42 AM	505	Onboarding



Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Documents (Company)

This is where you can view and print any documents that your employer has uploaded to a central company documents database. You can view, download, print, and save existing documents, but note that you cannot add new documents.

Documents (company)  



 Download



Download	Filename	Category	Title	Upload Date	Size (KB)	Upload By	Published To Manager
	MB Winery Company Handbook.pdf	HR Dept. Document	Company Handbook	05/25/2017 03:58 PM	2507	mblake@evolutionhcm.com	No Yes
	MB Winery Holiday Schedule.docx	HR Dept. Document	Holiday Schedule	06/09/2017 09:22 AM	11	mblake@evolutionhcm.com	No Yes



Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

My Emergency Contacts

Provides details for your emergency contact(s) information.



Emergency Contacts  

 New  Download

Actions	Contact Type	Contact First	Contact Last
	Spouse	Michael	Harper
	Mother	Jane	Forsyth

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

You can:


- Update an existing contact by clicking on the contact and make any required edits on the details screen.
- Delete an existing contact by clicking on the  icon to the left of the contact on the summary screen, or
- Add a new contact by clicking on the  icon on the summary screen and then adding the new information on the details screen.


Contact: Harper, Michael


Employee Company MB Winery (MB01) Employee Forsyth, Megan (2)	Contact Contact Type Spouse Priority Priority First Name Michael Middle Name Middle Name Last Name Harper
Contact Address Address Line 1 Address Line 1 Address Line 2 Address Line 2 City City	Contact Details Email mharper@anymail.com Home Phone 555.444.6857 Work Phone 123.456.7890 x123



My Summary

The **My Summary** screen presents a summary of your basic employee data. Note that any Organization information (Division, Branch, Department, and Team) displays here as well.

Employee Summary 

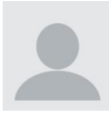
 Download

Emp ID	Status	Employment	Organization Structure <small>Division, Branch, Department, Team</small>	Position	Hire Date (orig)	Supervisor 1	EPO Link	Tax Form
9	Active	Full Time	Farm Stand, Warehouse, Customer Service, Alpha Team	Trainer	08/14/2017	Megan Forsyth		W2



 Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Click on the employee row to display a summary of your basic employee data.

Shelburne Farms 03 - Braverman, John (9)




Status: Active

Tax Form: W2

Hire Date: 08/14/2017

Termination Date: [Not Assigned]

EPO Link: 

Employment: Full Time

Position: Trainer

Supervisor 1: Megan Forsyth

Division: Farm Stand

Branch: Warehouse

Department: Customer Service

Team: Alpha Team

Profile

Name

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Nickname:

Address

Address Line 1:


Address Line 2:

City:

State:

Zip Code:

ID

Birthdate: 

Clock Number:

Contact Info

Email:

Home Phone:

Work Phone:

Cell Phone:

Links

Users linked to this Employee

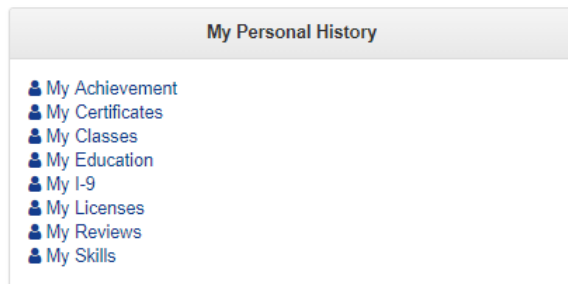
Username (email)	Contact	Status
braverman@sharklasers.com	Braverman, John	Active

Roles for all Users

Role	Level	Company Name
SF03 Base User	10	Shelburne Farms 03 (SF03)

My Personal History Menu

The **My Personal History** sub-menu of the [My HR](#) screen let's you choose from the following items:

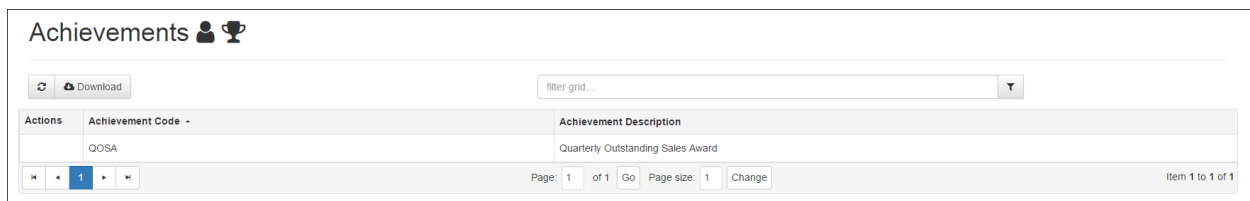


My Achievements

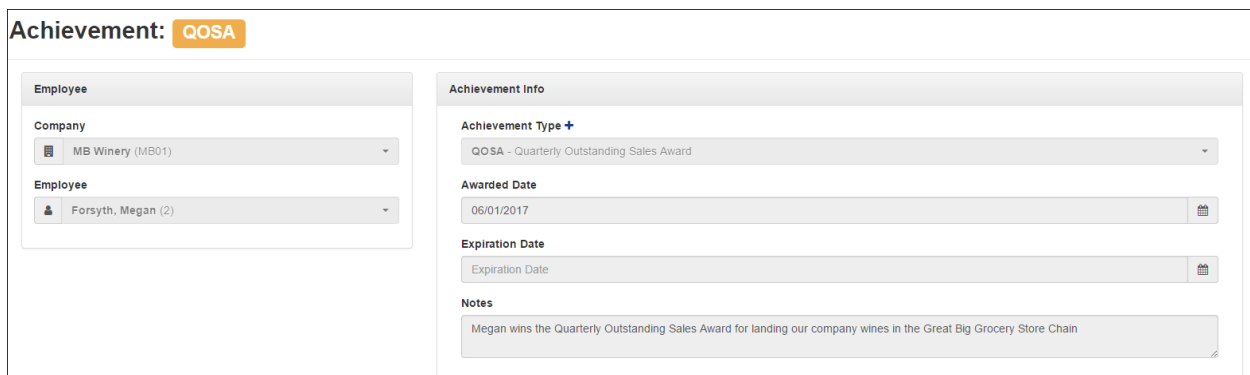
This option provides a high-level list of all your achievements – that is – employee accomplishments or recognitions. Accomplishments could also include a level of proficiency or a years of service marker.

Managers, Admins, SB Admins, and Super Admins can create and assign employee accomplishments or recognitions to employees. Any achievements will be added to the employee's record. They will appear in the employee's **My HR** screen under the **My Personal History** menu pane.

For example, Megan has won the Quarterly Outstanding Sales Award for her efforts.




Clicking on any achievement item row will display additional details and any attached documentation.





Admins can set up a Date-based Notification for an Achievement expiration that will appear on the employee's company Dashboard by using the **HR Admin – Communications – Notifications** screen.

My Certificates

This menu option is very similar to **My Achievements** and provides a list of any certifications with the details displayed by clicking on a specific certification item row on the summary screen, as shown in the second screenshot. For example, Megan has earned a CPR certification.

Certificates 

  Download

Actions	Certificate Code -	Certificate Description	Issue Date	Expire Date	Cert #
	CPR	CPR Certification	06/01/2017	06/30/2018	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Certificate: CPR

Employee

Company: MB Winery (MB01)

Employee: Forsyth, Megan (2)

Certificate Info

Certificate Type: CPR - CPR Certification

Certificate Number: Certificate Number

Notes: Notes

Issued By: John the Nurse

Issued Date: 06/01/2017


Expiration Date: 06/30/2018



Employee Acknowledged: ☐ No ☒ Yes

Admins can set up a Date-based Notification for a Certificate expiration that will appear on the employee's company Dashboard by using the **HR Admin – Communications – Notifications** screen.

My Education

Provides documentation about your educational accomplishments.

Education 

  Download

Actions	Education Code -	Education Description	Institution
	Bachelor	Bachelor's degree	UC-Davis

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Clicking on a row displays the details of that item.

Education: Bachelor

Employee

Company

MB Winery (MB01) ▼

Employee

Forsyth, Megan (2) ▼

Education Info

Education Type

Bachelor - Bachelor's degree ▼

Institution

UC-Davis

Major

Winemaking

Minor

Business

Completed Date

06/30/2010

GPA

3.5

Notes

Megan apprenticed at the Pretentious Winery of Napa Valley

My I-9

Displays the employee's I-9 information.

I-9

Download filter grid... Advanced Filter

All Sec 1 + Sec 2 Statuses ▼

Hire Date (orig) *	I-9 Status	I-9 Assigned	Status	Employment	Position
08/14/2017	<div style="display: flex; justify-content: space-between;"> Section 1 Section 2 </div> <div style="display: flex; justify-content: space-between;"> Incomplete Incomplete </div>	<div style="display: flex; justify-content: space-between;"> No Yes </div>	Active	Full Time	Trainer

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

My Licenses

Provides access to details about any license – including expiration dates and attached documents. For example, Megan has earned an official Corkmasters license from the Sommelier Institute.

Licenses

Download filter grid...

License Code -	License Description	Issue Date	Expire Date	License #
CM	Official Corkmasters License	06/30/2017	06/30/2020	564214

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Click on a row to display details about the license.

License: CM

Employee

Company

MB Winery (MB01)

Employee

Forsyth, Megan (2)

License Info

License Type

CM - Official Corkmasters License

License Number

564214

Issued By

Fancy Wine Magazine

Issued Date

06/30/2017

Expiration Date

06/30/2020

Notes

Megan has earned the Corkmasters license proclaiming her as a recognized official Sommelier

Employee Acknowledged

No Yes

Admins can set up a Date-based Notification for a License expiration that will appear on the employee's company Dashboard by using the **HR Admin – Communications – Notifications** screen.

My Reviews

You can view a list of your completed and scheduled performance reviews. Clicking on a specific review on the summary screen provides review details and any attached documents, as shown in the second screenshot.

Reviews 👤 🏆

[+ New](#) [Download](#)

Actions	Name	Employee ID	Reviewer	Scheduled Date	Status	Review Type
	Dyer, Boris	2	Forsyth, Megan	09/26/2017	Scheduled	Annual



Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1




Review: Annual

Employee Company Shelburne Farms 03 (SF03) Employee Dyer, Boris (2)	Review Info Review Type + Annual - Annual Status S - Scheduled Reviewer Forsyth, Megan (1) Scheduled Date 09/26/2017 Completed Date Completed Date Rating Rating Employee Acknowledged No Yes	Second Reviewer Second Reviewer Please Choose (represents BLANK) Scheduled Date Scheduled Date Completed Date Completed Date Rating Second Reviewer's Rating
--	--	---

My Skills

You can view a comprehensive list of all skills you have achieved. Clicking on an individual skill on the summary screen provides basic details of the specific skill, as shown in the second screenshot below.

Skills  

  Download filter grid... 

Actions	Skill Code -	Skill Description
	10-Key	10-Key
	Excel	MS Excel

Skill: 10-Key

Employee Company QTS Payroll Services Inc (HRNext) Employee Smith, Jim (1013)	Skill Info Skill Type 10-Key - 10-Key Notes Notes Proficiency Percentage 100 % Years of Experience 10.00
--	---

Documents

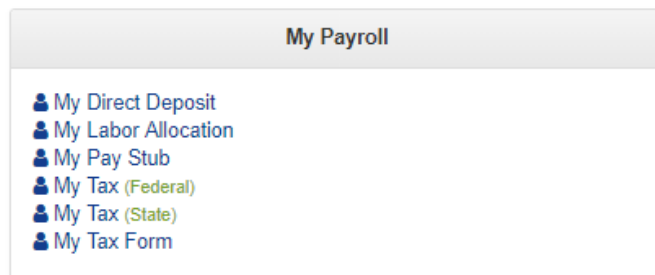
Already Attached

Browse or Drag/Drop documents

Temporarily Uploaded Documents

My Payroll Menu

The **My Payroll** sub-menu let's you choose from the following options:



My Direct Deposit

Base Users can add their Direct Deposits, whether for one bank account or multiple accounts. When an employee submits their Direct Deposit allocation(s) for approval, their supervisor gets an email notification of the submission, including a link to follow so that they can approve or reject the Direct Deposit request.

Be aware also that **Base Managers** and **Base Admins** have the ability to enter Direct Deposit information for employees. **Base Admins** can enter, view, and approve Direct Deposits for any employee in the company. **Base Managers** can only enter, view, and approve Direct Deposit information for the employees that they supervise.

The **My Payroll – My Direct Deposit** screen displays a list of all current and past direct deposits. Clicking on an individual item row provides the details, as shown in the second screenshot.

Direct Deposits

[+ New](#) [Download](#) [Advanced Filter](#)

Actions	Start Date	End Date	Routing	Account	Account Type	Status
	03/01/2016	02/24/2017	000000000	65885	Checking	Approved

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Deposit: Simon Quinn, 569

Employee Company JCoz - Cozy Inn & Hamburgers (JCoz) Employee Quinn, Simon (18)	Bank Info Routing Number 000000000 Account # 569	Account Type Checking No Yes Savings No Yes Money Market No Yes
Transaction Info Start Date 03/15/2017 End Date 03/17/2017 Amount Code Flat Amount Amount \$ 300.00	Details Prenote? No Yes	Deduction Info Deduction Code D02 - Partial Direct Deposit 1 Approval Status Please Choose (represents BLANK)

To enter a new direct deposit request record, click the **+ New** button.

Save Changes Save & Next Record Close


Deposit: NEW RECORD

Employee Company Shelburne Farms 03 (SF03) Employee Braverman, John (9)	Bank Info Routing Number 107000327 Account # 9561631686	Account Type Checking No Yes Savings No Yes Money Market No Yes
Transaction Info Start Date 01/03/2018 End Date End Date Amount Code Percentage Amount % 100.00	Details Enter the following information: <ul style="list-style-type: none"> • Routing Number • Account Number • Start Date • Amount Code <ul style="list-style-type: none"> ○ Percentage ○ Balance/Remainder ○ Flat Amount ○ Live Check Amount • Amount of Deposit 	Deduction Info Note that an Admin or Manager, upon approval, will enter the Deduction Info . These are the E/D codes from Evolution Classic.


Click **Save Changes** when complete.

Note: Currently, the only **Account Types** that are set up for Direct Deposits are **Checking, Savings, and Money Market**. The system will allow for multiple entries in each category. Remember, if there are multiple checking accounts, for example, you'll need the corresponding E/D codes for each account.

After receiving a notification that an employee has submitted a Direct Deposit request, the **Base Admin** user goes to **HR Admin - Employee Maintenance - Direct Deposit**, to approve it.

Direct Deposits 

[+ New](#) [Download](#) [Advanced Filter](#)

Actions	Name	Emp ID	Start Date	End Date	Routing	Account	Account Type	Status
	Mackay, Isaac	2	03/28/2017		000000000	89465435	Checking	Approved
	Ferrari, Harrison	106	04/12/2017		000000000	956514	Checking	Approved
	Blake, Anne	16	04/24/2017		000000000	984654	Checking	Approved
	Poole, Frank	123	04/25/2017		000000000	94622	Checking	Approved
	Mandrake, Lionel	108	05/16/2017		000000000	6656599855	Checking	Approved
	Blaker, Harriette	20	06/02/2017		000000000	500	Checking	Approved
	Arpuvian, Samson	134	01/03/2018		107000327	5165164685	Checking	Pending

Page: 3 of 3 Go Page size: 15 Change Item 31 to 43 of 43

The **Base Admin** sees a Direct Deposit dashboard for the company. They click on the name of the employee that has a Pending Direct Deposit request. In the **Deduction Info** section, they enter a **Deduction Code** for the Direct Deposit and change the **Approval Status** to **Approved**.

[Save Changes](#) [Save & Next Record](#) [Prev Record](#) [Next Record](#) [Close](#)

Deposit: 5165164685

Employee

Company: WR Shelburne Inn & Shoppes (WRI)

Employee: Arpuvian, Samson (134)

Bank Info

Routing Number: 107000327

Account #: 5165164685

Account Type

Checking: ☒ Yes

Savings: ☐ Yes

Money Market: ☐ Yes

Transaction Info

Start Date: 01/03/2018

End Date: End Date

Amount Code: Percentage

Amount: % 100.00

Details

Prenote?: ☒ No

Deduction Info

Deduction Code: D01 - Net Pay Direct Deposit

Approval Status: Approved

Admins have the ability to edit any information. However, you'll need to enter a **Deduction Code** and change the **Status** to **Approved**.

Once Approved, the Direct Deposit will be active.

Note: Your Administrator may have set up the **Notifications** feature in the system so that you (the employee) are notified when the following events occur:

- When you submit a Direct Deposit request: to let you know it has been successfully submitted
- When your Direct Deposit request has been approved
- If your Direct Deposit request has been rejected

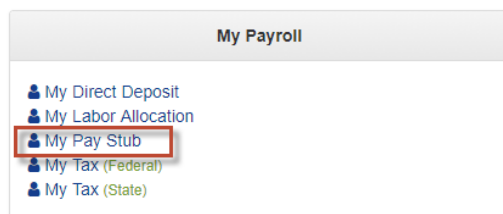
Download		filter grid...			
Direct Deposit - Direct Deposit					
Category	Name	Active	Recipients	Delivery	Description
Direct Deposit	Request Submitted	No Yes	Target Employee	Delivery when event occurs	Sent to Employee to let them know their request is successfully submitted.
Direct Deposit	New Request	No Yes	Target Employee ~ Reports To 1	Delivery when event occurs	Sent to the people responsible to review and approve new direct deposit requests when they are submitted.
Direct Deposit	Request Rejected	No Yes	Target Employee	Delivery when event occurs	Sent to Employee to let them know their deposit request is rejected.
Direct Deposit	Request Approved	No Yes	Target Employee	Delivery when event occurs	Sent to Employee to let them know their deposit request is approved.
Page: 1 of 1 Go Page size: 4 Change					

Admins can set up Direct Deposit related Notifications on the **HR Admin – Communications – Notifications** screen, shown above.

My Pay Stub

Use the **My Pay Stub** option to download and/or print a copy of any of your pay stubs (checks) issued for payroll.

Go to **My HR – My Payroll – My Pay Stub**.







The system displays the **Pay Stubs** Dashboard.

Pay Stubs		
Download		
Pay Stub Download	Check Date	Gross Wages
	07/29/2016	1,400.00
	07/01/2016	1,400.00
	06/17/2016	1,400.00
	03/25/2016	1,400.00
Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4		

Pay Stubs 👤 \$

Download



Pay Stub Download	Check Date *	Gross Wages
	07/29/2016	5,000.00
	07/01/2016	5,000.00
	06/17/2016	5,000.00
	03/25/2016	5,000.00

« 1 »

The **Pay Stubs** Dashboard will allow the employee to:

- View a **Check Date**
- View their **Gross Wages**
- Download a PDF of their **Pay Stub**

Click on the Pay Stub check date row for the check that you want to download. The system displays the PDF icon of the pay stub at the bottom corner of the screen.

	04/21/2017	3,226.42
 Paystub-6-30-2017.pdf ^		

Click on the PDF icon to display or download the PDF file to your machine. The system displays the PDF of the your selected pay stub.

Candice J Moreland			USA PAYROLLS, INC.			2601 Lac De Ville Blvd ROCHESTER NY 14618 585-427-2010		
Company 9999	Period Begin 6/10/2017	Division	Fed OR addl \$20.00 Birthday 8.00-0.00=8.00 HOURS PTO 227.00-63.00=164.00 HOURS DU Balance Paid \$125.00					
Number 8	Period End 6/23/2017	Branch 1						
Social Security #	Check Date 6/30/2017	Department 230						
Hire Date 5/10/1996	Check Number -99916274	Team						
Earnings			Deductions					
Description	Location / Job	Rate	Hours/Piece	Current	Year To Date	Description	Current	Year To Date
Regular		0.00	63.00	0.00	0.00	Fed (M/O) (1994.40)	233.39	2955.66
Salary		0.00	0.00	2423.03	30474.30	OASDI (2189.04)	135.72	2021.44
Commission		0.00			3540.69	Medicare (2189.04)	31.74	472.76
Gas Allowance (Taxable)		0.00	0.00	10.00	130.00	NY (M/O) (1994.40)	94.71	1197.40
PTO		0.00	9.00	0.00	0.00	NYS DBL	1.20	15.60
Quarterly Bonus		0.00			1500.00	AFLAC Cancer Pre Tax	39.48	513.24
Retro Pay		0.00			93.19	Cell Phone Allowance	-60.00	-360.00
Group Term Life		0.00	0.00	2.74	35.62	Pretax Dental	38.02	456.24
MEMOS		0.00				HSA Savings Acc 06007XXXX	169.23	2199.99
ER 401K Match		0.00	0.00	97.32	1236.70	Internet Access Fees	-239.70	-239.70
		0.00				Mileage Reimbursement	-72.37	-1061.87
		0.00				United Way		40.00
		0.00				Direct Deposit 10040XXXX	1627.27	21524.89
		0.00				401k	194.64	2473.51
Total Earnings			72.00	2435.77	35773.80	Total Deductions	2433.03	32209.16
NET PAY	1627.27	Total Direct Deposits	1627.27	Check Amount	0.00			3529.02

You can print or download the pay stub file.

My Tax (Federal)

This option provides a description and settings (if applicable) for all employee and employer Federal taxes.

Federal Taxes 🧑💰					
Download					
Employee Name -	Employee ID	Marital Status	Tax Type	Exemption Type	Exemptions
Fornuto, Ralph	2	Married	W2	RegularPercent	23.0

My Tax (State)

This option provides a description for all employee and employer state taxes.

State	SUI State	SDI State	Marital Status	Tax Exemptions
VT	VT	VT	Married	1

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

My Tax Form

This option let's employees view their W-2 and other Tax Forms. These include: EE W2 Electronic Copy, EE 1095B Electronic Copy, EE 1095C Electronic Copy, and 1099-Misc.

Tax Forms 🧑💰	
Download	
Tax Form Download	Description
NO Records	

Page: 1 of 1 Go Page size: 15 Change Item 0 to 0 of 0

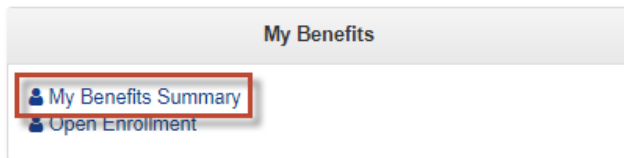
My Benefits Menu

The **My Benefits** section of the **My HR** tab contains the following Benefits related items.

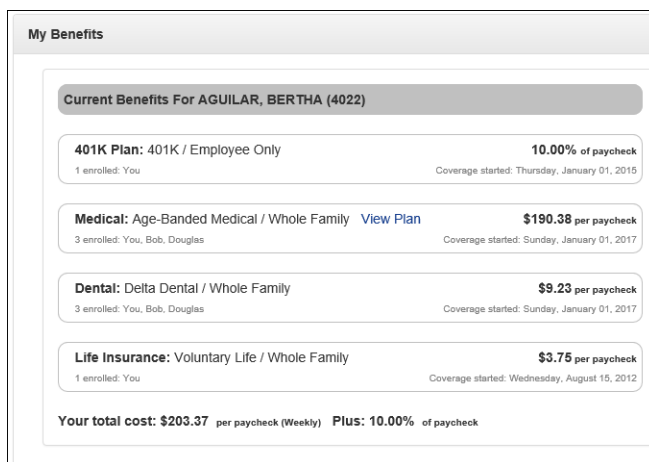
My Benefits	
🧑	My Benefits Summary
🧑	Open Enrollment

My Benefits Summary

If your company is utilizing the Benefit Management option within Advanced HR 2.0, you can view your current benefit elections by clicking on the **My Benefits Summary** menu item on the **My HR** tab.



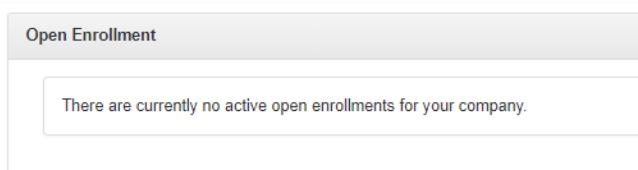
The system displays your current benefits elections.



Open Enrollment

In addition to the **My Benefits Summary**, at certain times of the year, you may be able to enroll in benefits through Advanced HR 2.0 during an Open Enrollment period. If this option is being utilized, you will be notified when open enrollment starts and be able to review options and either decline or accept coverage by clicking on the **Open Enrollment** link on the **My HR** tab.

If your company is not in an open enrollment period you receive the following screen.



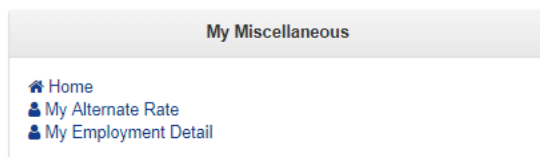
If your company is in an active open enrollment period, then you receive a screen similar to the one below where you can click on the **Begin Enrollment** button to start your benefit enrollment process.



See the *Advanced HR 2.0 Benefits Guide* for information on how to use open enrollment.

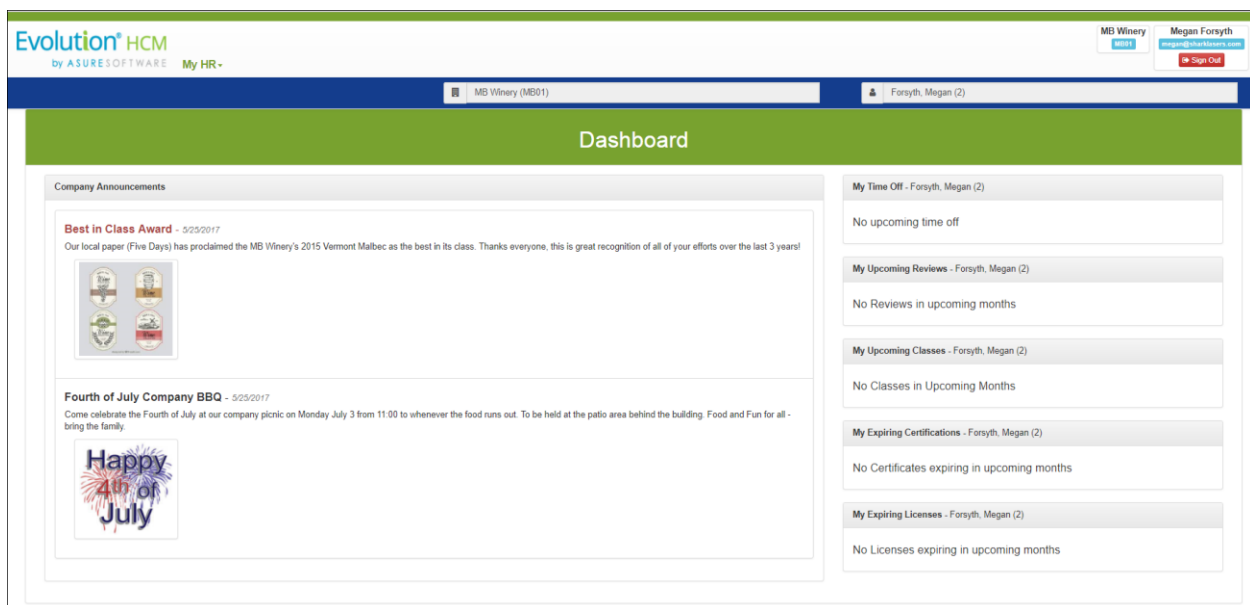
My Miscellaneous Menu

The **My Miscellaneous** sub-menu let's you choose from the following options:



Home

Click this option to return to your [Dashboard](#) (Home) page where you can view any company announcements, upcoming days off, and any expiring licenses or certifications, upcoming classes and reviews.



You can also get back to the Dashboard from any screen by clicking on the logo in the upper left of the screen.

My Alternate Rate

The My Alternate Rates screen provides details on any alternate rates assigned for specific jobs, shifts, etc. Clicking on a summary line displays more details on the specific alternate rate as shown in the second screenshot.

Alternate Rates 👤💰

[+ New](#) [Download](#)

Actions	Rate Code	Hourly Rate
	2	2.00
	3	4.50

Page: 1 of 1 Go Page size: 2 Change

Alternate Rate: 2

Employee

Employee

Smith, Jim (1013)

Alternate Rate Info

Rate Type

2 - Rate Code 2

Start Date

08/29/2016

End Date

End Date

Hourly Rate

\$ 2.00

Notes

Shift differential for working evening shifts.

My Employment Detail

Provides a summary of your position within the organization. Clicking on the summary line displays the complete detail of your position. Also displays details about your veteran status, if applicable.

Employment Detail 👤👥

[Download](#) [Advanced Filter](#)

Eff Date	Position	Organization Structure	Status	Reports To 1	Hire	Term	Employment	Change Reason
05/25/2017	Sales Rep	Corporate Headquarters, Marketing, Sales	Active		No Yes	No Yes	Regular Full Time	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Click on the position row to display more details about the position.

Employment Detail:

Employee

Company

MB Winery (MB01)

Employee

Forsyth, Megan (2)

Effective Date

Effective Date

05/25/2017

Position/Status

Position

SA - Sales Rep

Employment Type

RFT - Regular Full Time

Status

AC - Active

Active

Position/Org records for employee

Eff Date	Status	Position	Division	Branch	Department	Team	Hire	Term
05/25/2017	Active	Sales Rep	Corporate Headquarters	Marketing	Sales		✓	

Organization

Division

01 - Corporate - Corporate Headquarters

Branch

Please Choose (represents BLANK)

Department

Please Choose (represents BLANK)

Team

Please Choose (represents BLANK)

Compliance

EEO Category

Please Choose (represents BLANK)

Worker Comp Code

Please Choose (represents BLANK)

Position/Org for employee section - These are all the Position/Organization records for the selected employee. Please consider the effective dates when editing or adding new records as it could make a difference in terms of what record is currently “effective.”

Reports To/Supervisor

Reports To 1

Please Choose (represents BLANK)

Reports To 2

Please Choose (represents BLANK)

Reports To 3

Please Choose (represents BLANK)

Supervisor (SC)

Supervisor (SC)

Benefits

Benefit Class / Eligibility Group

Please Choose (represents BLANK)

Hire/Term

Hire Record

No Yes

Termination Record

No Yes

Termination Reason

Please Choose (represents BLANK)

Comment/Reason

Change Reason

Please Choose (represents BLANK)

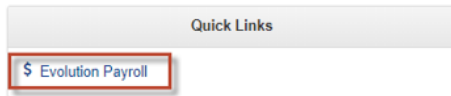
Comment

Comment

Note the **Reports To/Supervisor** section of the screen. **Supervisor (SC)** - This field can be used as a user defined text representation of the Supervisor. It is also commonly used as an option in various Time Clock integrations.

Accessing Evolution Payroll from Advanced HR

Admin and Manager users who have also been granted security group access to Evolution Payroll, can use the **Quick Links – Evolution Payroll** menu item to access Evolution Payroll from Advanced HR.

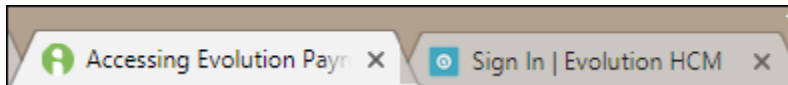


When clicked, a new browser tab will automatically open for your **Evolution Payroll** environment.

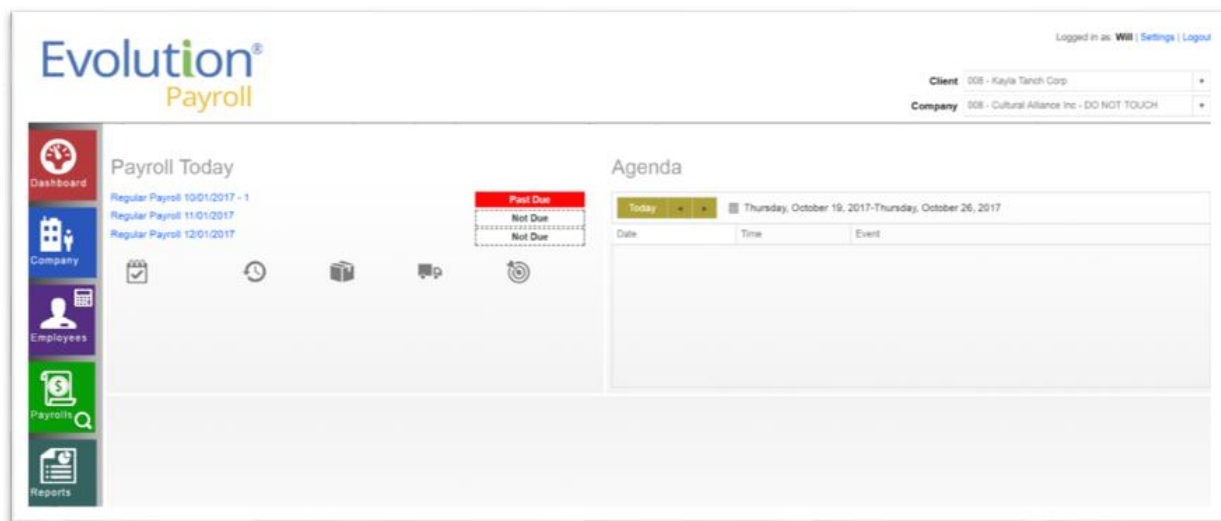
It's important to remember is that the user needs the appropriate Security Roles assigned to them, including access to Evolution Payroll and Evolution Single Sign On.

To open Evolution Payroll from Advanced HR 2.0:

1. From the **Manager Service** or **HR Admin** tab, on the **Quick Links** menu, click the **Evolution Payroll** menu item.
2. The system will open up Evolution Payroll in a separate tab on your browser.



With the Single Sign On functionality setup properly, you should be automatically logged into Evolution Payroll Dashboard (without having to log in again).



This new browser tab will allow you to access the functionality within Evolution Payroll that is associated with your user rights that are defined in Evolution Classic.

Logging Out of Advanced HR 2.0

To log out of Advanced HR 2.0, simply click the **Sign Out** button at the top right of any screen.

To log out of Advanced HR 2.0, click the red **Sign Out** button at the top right corner of any screen.

