

Employee Maintenance Guide

Advanced HR 2.0



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Document Revision History

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1.0	2.0	10/27/2017	This information concerning the Employee Maintenance tile has been removed from the Administrator Guide into this new, separate guide.
1.1	2.0	11/1/2017	Added Pay Stub menu item description.
1.2	2.0	11/20/2017	Added how to terminate an employee.
1.3	2.0	12/12/2017	Added note about EPO Link icon field on Employee Summary screen.
1.4	2.0	12/21/2017	Added a change that a rate entered in the Alternate Rate screen is set to Not be the Primary Rate by default.
1.5	2.0	12/28/2017	Added Note screen.
1.6	2.0	1/9/2018	Added info to Direct Deposit section, including DD Notifications.
1.7	2.0	1/23/2018	Added Tax Form menu item and I-9 employee Notification.
1.8	2.0	1/30/2018	Added Synch Employee to TimeClock button for 1099 employees on Employee Summary screen.
1.9	2.0	2/27/2018	Added date-based notifications for expiring licenses & certifications.
1.10	2.0	3/15/2018	Added Employee Summary - Advanced Filter description. Added Re-Hiring an employee.

Audience and Additional Advanced HR 2.0 Documentation

The intended audience for this guide is Service Bureau administrators and managers. It contains information about how to maintain specific employee records in Advanced HR 2.0. The following is a list of the other Advanced HR 2.0 User Guides; all are available on the **Evolution Resource Center** for online viewing or for downloading.

Advanced HR 2.0 User Guides:



- Applicant Tracking Guide
- Single Sign On Guide
- Benefits Guide
- New Employee Onboarding Guide
- Reporting Guide
- Security Guide
- Customizing Security Roles/Users Guide
- Implementation Guide

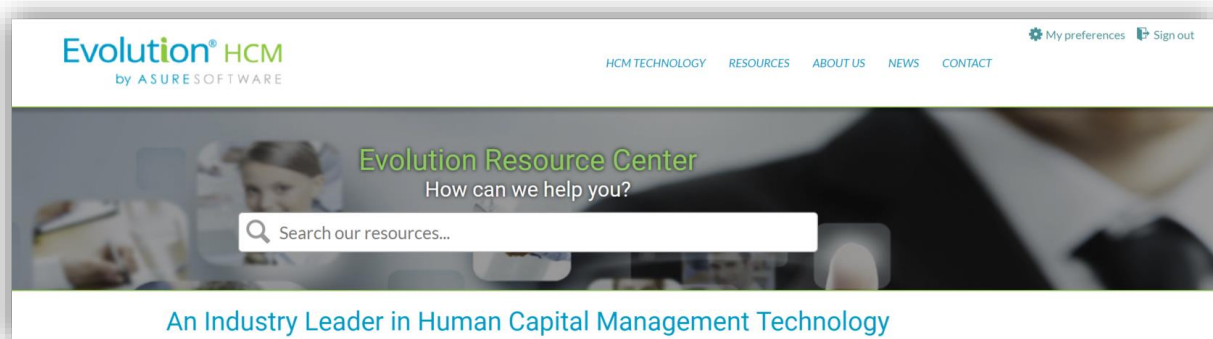
Employee end users should refer to the separate document *Getting Started: Employee End User Guide* which describes Advanced HR 2.0 from the employee user point of view.

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 now 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

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Email our Training Department to schedule a training:

Training@evolutionhcm.com

Email our Implementations Team:

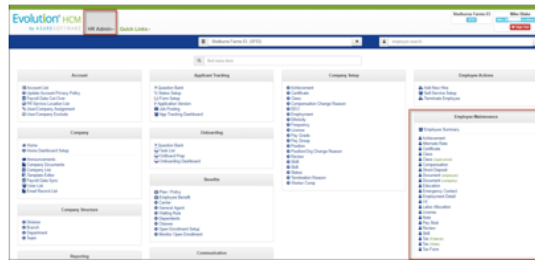
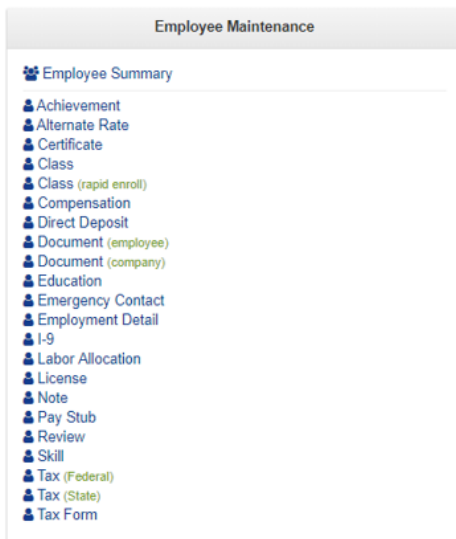
AHR_implementations@asuresoftware.com

Advanced HR 2.0 Employee Maintenance Guide

Welcome to your Advanced HR 2.0 Employee Maintenance Guide! This Guide discusses how administrators and managers can update specific employee records. It also discusses the Employee Summary screen.

Employee Maintenance Menu

The **Employee Maintenance** tile or sub-menu on the **HR Admin** page is the area where you work with *specific employee* records. Depending on your security settings, you may be able to add, edit, inactivate, and delete specific employee records. An end user, such as an **HR Manager** or **Admin**, will most likely be accessing this tile on a regular basis. The importance of keeping these fields updated on the Employee Maintenance menu, of course, is essential to Advanced HR 2.0 operations.



Go to **HR Admin - Employee Maintenance** for access. Within the tile, you can:

- View the **Employee Summary**
- Set **Alternate Pay Rates**
- Enroll an employee in **Training Classes**
- View and edit **Direct Deposit** information
- Add employee and company **Documents**
- View and edit **Emergency Contact** information
- View an employee's **I-9**
- View and edit an employee's **Labor Allocation**
- Access **Pay Stubs**
- View and edit an employee's **Tax information**
- View electronic **tax forms**

This guide will describe selected menu options of the **HR Admin – Employee Maintenance** menu.

Note: You can only delete a record that has not been used AND is not in the employee's payroll history. You can only terminate, not delete, an employee.

Updating Information from the Onboarding Validation Report

A **one-time task** you will do using various **Employee Maintenance** menu items is to update any future dated information you found by running the **Onboarding Validation Report (S3550)** before performing the Payroll Data Cutover process (described in the *Advanced HR 2.0 Administration Guide*).

The Payroll Cutover process will not bring over any future effective date information from Evolution Classic that is AFTER the actual payroll cutover date. Because of this, it is necessary to find the items that have a future effective date in Evolution Classic, and remove the future information prior to the cutover.

Once that information is removed, and the Company has been brought over to Advanced HR, the information can be re-entered into the Advanced HR 2.0 system with the future effective date again.

The following is a list of the fields to be identified:

- Name (first, middle initial, last) fields
- Social Security Number
- Current status code
- Salary amount
- Rate number
- Rate amount
- DBDT fields
- Default Workers Comp number

#Jennifer JS Shelburne Inn & Shoppes			AHR 2.0 Onboarding Validation (S3550)	
			Onboarding Date:	11/1/2017
Employee Number:	1	Name: Megan Forsyth	SSN:	xxxx-xx-1111
Effective Date		Field	Field Value	
1/1/2018		Last Name		Hebert
1/1/2018		Middle Initial		
Employee Number:	2	Name: Isaac Mackay	SSN:	xxxx-xx-1089
Effective Date		Field	Field Value	
12/1/2017		Branch		Reception
12/1/2017		Department		Desk
12/1/2017		Division		Main Office
Employee Number:	5	Name: Virginia Parsons	SSN:	xxxx-xx-3212
Effective Date		Field	Field Value	
11/15/2017		Default WC		Wheat/Hay Bailing

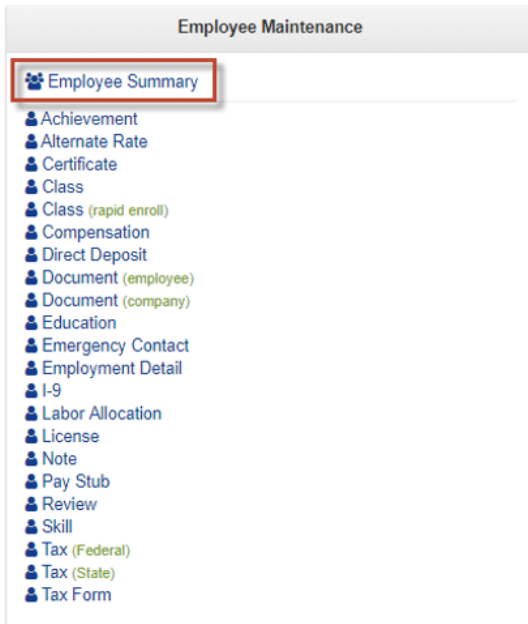
A sample Onboarding Validation report is shown above right.

Using the Onboarding Validation Report that was run prior to the Payroll Cutover, the user should begin to update any necessary fields as soon as possible. Most importantly, fields impacting payroll should be updated first.

Note: The AHR 2.0 Onboarding Validation Report (S3550) is a Company Level Report that must be pulled from the **SB Reports** and then added to each company that will be cutover. In Evolution Classic, go to **Bureau - Company Default Reports**.

The fields that need to be updated will, for the most part, be located in the **Employee Maintenance** tile in the **HR Admin** menu tab. Once these fields are updated in Advanced HR 2.0, the information will flow back into Evolution Classic.

Employee Summary



Go to HR Admin – Employee Maintenance – Employee Summary to view and edit employee information

You'll be taken to the **Employee Summary Dashboard**. This dashboard will display a list of all the active employees in the company. The Employee Summary Dashboard allows the user to access **Employee** information at a glance, add a **New Hire**, begin **Onboarding Prep**, and start the **Self-Service Setup**:

The screenshot shows the "Employee Summary" dashboard. At the top, there are buttons for "Add New Hire", "Onboarding Prep", "Self-Service Setup", and "Download". Below these is a search bar and an "Advanced Filter" dropdown. The main part of the dashboard is a table with the following columns: Actions, Name, Emp ID, Status, Employment, Organization Structure (with a sub-link for "Division, Branch, Department, Team"), Position, Hire Date (orig), Supervisor 1, EPO Link, and Tax Form. The table contains five rows of employee data.

Actions	Name	Emp ID	Status	Employment	Organization Structure <small>Division, Branch, Department, Team</small>	Position	Hire Date (orig)	Supervisor 1	EPO Link	Tax Form
	Alfonse, Jamison	12	Active	Full Time	Farm Stand, Warehouse, Customer Service	Trainer	09/11/2017	Megan Forsyth		W2
	Braverman, John	9	Active	Full Time	Farm Stand, Warehouse, Customer Service, Alpha Team	Trainer	08/14/2017	Megan Forsyth		W2
	Dyer, Boris	2	Active	Full Time		Trainer	08/02/2017	Megan Forsyth		W2
	Fleck, Bill	8	Active	Full Time	Farm Stand, Warehouse, Customer Service	Lab Technician	08/09/2017	Megan Forsyth		W2
	Forsyth, Megan	1	Active	Full Time		Customer Service Manager	08/02/2017			W2

Employee Summary screen

If you are a **Super Admin**, you will see all employees for all companies. If you are a **Service Bureau Admin**, you will only see the employees of the companies you have access to.

Before applying any filters you will have visibility of *all* active and terminated employees. This grid can easily be filtered down to any level of visibility including hire date range utilizing the **Advanced Filter**.

The **Employee Summary** dashboard displays the following information for employees in column fields:

- Employee Name
- Employee ID (Employee number)

- Status
- Employment Type
- Organization Structure (DBDT)
- Position
- Hire Date
- Supervisor 1
- Tax Form

From the **Employee Summary** screen, you also have the option of:

- Add a new hire
- Initiate Onboarding Prep (getting a new hire or candidate ready for onboarding)
- Self-Service setup (do a mass self-service onboarding)
- Terminate a specific employee by clicking on the red icon in the **Actions** column
- Click on the **EPO Link** icon on a row to go directly to that Employee’s **Employee Detail** screen where you can **create a new Position Org entry for the employee**.

Employee Summary

Actions	Name	Emp ID	Status	Employment	Organization Structure <small>Division, Branch, Department, Team</small>	Position	Hire Date (orig)	Supervisor 1	EPO Link	Tax Form
	Alfonse, Jamison	12	Active	Full Time	Farm Stand, Warehouse, Customer Service	Trainer	09/11/2017	Megan Forsyth		W2
	Braverman, John	9	Active	Full Time	Farm Stand, Warehouse, Customer Service, Alpha Team	Trainer	08/14/2017	Megan Forsyth		W2
	Dyer, Boris	2	Active	Full Time		Trainer	08/02/2017	Megan Forsyth		W2

It will add an additional line for the new entry for that effective date. Note that when you go to the **Employment Detail** screen, find something in the list and edit it, the system will edit that specific entry, it will not create a new one.

Employment Detail:

Employee

Company: Shelburne Farms 03 (SF03)

Employee: Alfonso, Jamison (12)

Effective Date: 11/13/2017

Position/Status: Trainer - Trainer, Full Time - Full Time, Active - Active

Active

Position/Org records for employee

Eff Date	Status	Position	Division	Branch	Department	Team	Hire	Term
11/13/2017	Active	Trainer	Farm Stand	Warehouse	Customer Service			
09/11/2017	Active	Trainer	Farm Stand	Warehouse	Customer Service		✓	

Organization

Division: Farm Stand - Farm Stand

Branch: Warehouse - Warehouse

Department: Customer Service - Customer Service

Compliance

EEO Category: Please Choose (represents BLANK)

Worker Comp Code: Please Choose (represents BLANK)

See the **Employee Detail** screen section of this document for more information about this screen.

Using the Employee Summary Advanced Filter Screen

Click the **Advanced Filter** button at the top right of the **Employee Summary** screen to display the **Advanced Filter** screen.



You can use the **Advanced Filter** to specify the list of employees that you want to display on the **Employee Summary** screen.

The 'Advanced Filter' dialog box is shown. It has a title bar with a close button (X). Below the title bar is a section for 'Hire Date (orig)' with an information icon (i). Underneath are two date pickers: 'Start' and 'End', both with a blue 'Eastern' label and a calendar icon. Below the date pickers are three radio buttons for 'Active': 'NO', 'ALL', and 'YES'. The 'YES' radio button is selected. Below the radio buttons is a section for 'Include Other Employees (Future Hires)' with 'No' and 'Yes' radio buttons. At the bottom right are two buttons: 'Apply Filter' (green) and 'Clear Filter' (red).

Use the **Hire Date** section to narrow the list of employees displayed by their date of hire as follows:

A close-up screenshot of the 'Hire Date (orig)' section of the Advanced Filter dialog box. It shows the 'Start' and 'End' date pickers, both with a blue 'Eastern' label and a calendar icon. There is also an information icon (i) to the right of the 'Hire Date' label.

- To display a list of employees hired within a specified time period, enter both a **Start Date** and an **End Date**.
- To display a list of employees hired *on or after* a certain date, enter the **Start Date** only.
- To display a list of employees hired *on or before* a certain date, enter the **End Date** only.
- Click the blue Information Icon (i) to display a Help topic of these guidelines. Click on the Information Icon again to hide the Help topic.

Use the **Active** toggles section of the **Advanced Filter** to narrow the list of displayed employees by their Status as follows:

Active

NO ALL YES

Include Other Employees (Future Hires)

No Yes

- The **Active** toggle setting will default to **Yes** to display all employees with a **Status** of **Active**.
- Set the **Active** toggle to **All** to display employees with all Statuses.
- Set the **Active** toggle to **No** to not display employees with a **Status** of **Active**.
- You can include future hires in the list by setting the **Include Other Employees (Future Hires)** toggle to **Yes**. The default setting for this toggle is **No**. This would include someone who has gone through the Applicant Tracking process, was hired, but will not actually start as an employee until a future date. This is a way for Admins to be able to see these people.

Complete your settings on the Advanced Filter screen and then click the **Apply Filter** button.

Note: An important item to be aware of about the Advanced Filter is that it is referred to as “Sticky.” This means that if you activate the Filter by applying some settings, then anytime you display the Employee Summary, the system will apply your filter settings to the list of employees it displays in the screen grid. To inactivate (“unstick”) the filter, you must clear the settings on the Advanced Filter screen by clicking the **Clear Filter** button.

Employee Summary Screen Information:

When an employee is selected on the **Employee Summary**, their information is displayed in sections.

When an employee is selected, their information is displayed in sections:

- Summary
- Profile
- Classification
- Links
- Payroll
- Employment
- Benefits
- Documents

Section	Description
Summary	Gives a read only breakdown of the employee's information.
Profile	Displays Name, Address, SSN, etc.
Classification	Shows Gender, Ethnicity, Marital Status, etc.
Links	Displays the Linked User(s) . Shows what Security Role(s) the employee has assigned to them. Also allows for the Quick User Add to be used
Payroll	Displays Pay Frequency and Standard Hours.
Employment	Shows FLSA Classification and whether or not the employee is Eligible for Rehire.
Benefits	Allows the user to set an Eligible for Benefits date and what Medical Coverage is Offered.
Documents	Employee specific Documents can be uploaded.
Integration	Can be used to synch Employee to Timeclock (for W-2 or 1099 employees)


Note: Any of the above fields can be edited as long as you have the appropriate security settings. Remember, when updating any field, click the green **Save Changes** button on the top or at the bottom of the screen.

To view the Employee Summary:

Go to **HR Admin – Employee Maintenance – Employee Summary**.

The Top (Summary) section is a dashboard of important info with more detailed sections below. Your ability to edit this information is dependent on your security role access. Managers for example, are only allowed access to their designated supervisees.

Shelburne Farms 03 - Braverman, John (9)

	<p>Status: Active</p> <p>Tax Form: W2</p> <p>Pay Type: Hourly</p> <p>Pay Rate: \$10.00</p>	<p>Hire Date: 08/14/2017</p> <p>Termination Date: [Not Assigned]</p> <p>EPO Link: Ⓞ</p>	<p>Employment: Full Time</p> <p>Position: Trainer</p> <p>Supervisor 1: Megan Forsyth</p>	<p>Division: Farm Stand</p> <p>Branch: Warehouse</p> <p>Department: Customer Service</p> <p>Team: Alpha Team</p>
---	---	---	---	--

When an employee is selected, their information is displayed in sections on the **Employee Summary**. Scroll down to find:

Section	Description
Summary	Gives a read only breakdown of the employee's information.
Profile	Displays Name, Address, SSN, etc.

Section	Description
Classification	Shows Gender, Ethnicity, Marital Status, etc.
Links	Displays the Linked User(s).
Payroll	Displays Pay Frequency and Standard Hours.
Employment	Shows FLSA Classification and whether or not the employee is Eligible for Rehire.
Benefits	Allows the user to set an Eligible for Benefits date and what Medical Coverage is Offered.
Documents	Employee specific Documents can be uploaded.

In the **Profile** section, we can see the employee’s basic information. The Clock Number would be the SwipeClock number.

The **Classification** section displays gender, marital status, and ethnicity.

Classification

Gender <input type="text" value="M - Male"/>	Ethnicity <input type="text" value="W - White"/>
Marital Status <input type="text" value="S - Single"/>	Education Level <input type="text" value="Please Choose (represents BLANK)"/>

Military Service

Military Reserve	<input type="text" value="No"/>
Veteran	<input type="text" value="Yes"/>
Discharge Date	<input type="text" value="Discharge Date"/>
Disabled Veteran	<input checked="" type="radio"/> No <input type="radio"/> Yes
Armed Forces Service Medal Veteran	<input checked="" type="radio"/> No <input type="radio"/> Yes
Vietnam Era Veteran	<input checked="" type="radio"/> No <input type="radio"/> Yes
Other Protected Veteran	<input checked="" type="radio"/> No <input type="radio"/> Yes

User Defined / Custom allows for editable memo codes to record any applicable information.

User Defined/Custom


Memo 1	Memo 3
<input type="text" value="Disability"/>	<input type="text" value="Memo 3"/>
Memo 2	
<input type="text" value="Memo 2"/>	

Links section – with **Quick User Add**



The **Links** tile allows the user to link the employee with a user. You can also see what Security **Role(s)** this employee has been assigned.

Links

Users linked to this Employee

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

Select existing user (type to search)

Quick User Add is a simple way to create a user, link them to the employee, and in turn link them to the company.

Click the blue **Add User** button when complete. You'll be taken back to the **Employee Summary** screen. Remember to click the green **Link User** button to link:

- The user
- The employee
- The company

Important Note: Remember, you have an employee and you have a user. They have to be linked together. If they are not linked together, then when the employee logs in, they will not have any access to anything; they will see a blank Dashboard.

In the **Roles for all Users** section, you can see what role this user has.

Roles for all Users		
Role	Level	Company Name
SF03 Base User	10	Shelburne Farms 03 (SF03)

You can see that this user is a **Base User**.

The **Quick Add User** popup allows you to add a user to the system with the most important fields:

- Create Username
- Edit Contact info
- Send a Welcome Email
- Assign a Role

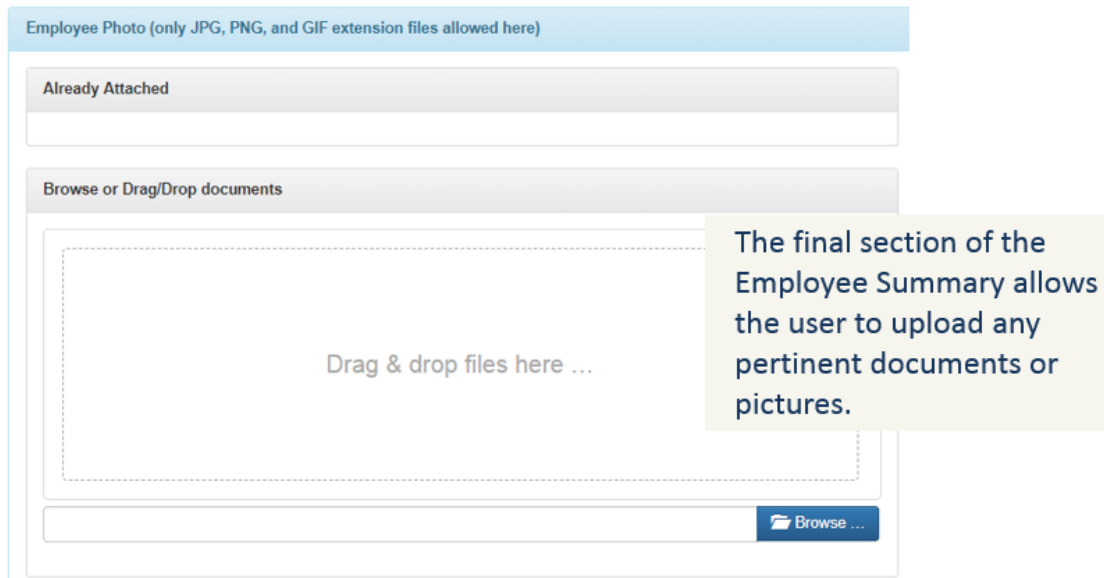
Note: Remember that **usernames** (emails) must be unique to the system. Advanced HR 2.0 will verify that the new username is not already being used. **Quick User Add** is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered, go to the **Company - User List** screen after completion to review or add other details.

Payroll / Employment / Benefits sections

An employee's **Payroll**, **Employment**, and **Benefits** information can be accessed and edited. You can set a benefits eligibility date here and what medical coverage is offered.

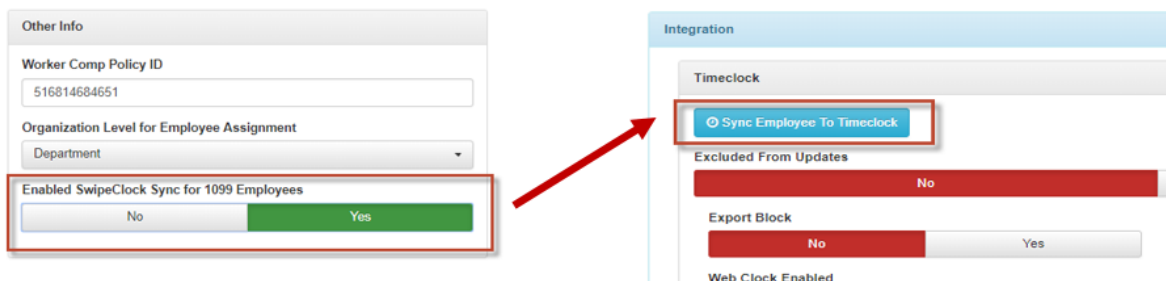
Please note that what appears in the dropdowns is actually created in the **Company Setup** tile.

Employee Photo section



Integration section

A **Timeclock** tile may display in the **Integration** section of the **Employee Summary** screen, if, for this company, in the **Other Info** section of the **Company List** screen, the **Enabled SwipeClock Sync for 1099 Employees** Yes/No toggle button has been set to **Yes**.






Previously, the button only appeared for regular (W-2) employees.



Note: Any of the above fields can be edited as long as you have the appropriate security settings. Remember, when updating any field, click the green **Save Changes** button on the top or at the bottom of the screen.

Achievement

Provides a high-level list of the employee’s achievements. Clicking on any achievement item row will display additional details and any attached documentation, as shown in the second screenshot.

Achievements  

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

Actions	Name	Employee ID	Achievement Code -	Achievement Description
	Oakley, Warren	1	QOSA	Quarterly Outstanding Sales Award
	Forsyth, Megan	2	QOSA	Quarterly Outstanding Sales Award

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

Achievement: NEW RECORD

Employee

Company
MB Winery (MB01)

Employee
Please Choose (represents BLANK)

Achievement Info

Achievement Type +
Please Choose (represents BLANK)

Awarded Date

Expiration Date

Notes

Documents

Already Attached

Browse or Drag/Drop documents

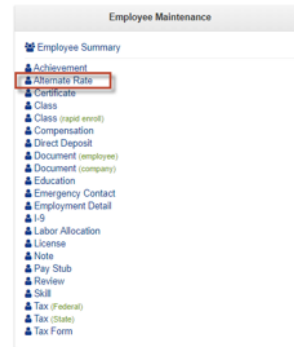
Temporarily Uploaded Documents

Alternate Rate

The **Alternate Rate** screen provides details on any alternate rates assigned for specific jobs, shifts, etc., *other than* the Primary Rate – see the “**Primary Compensation Screen**” section.

To view or edit an employee's alternate pay rates, click on **Alternate Rate**.

Unless you are locked into a particular employee, you will see all the employees for the company that have alternate rates.



Alternate Rates 👤💰

+ New Download Filter grid

Actions	Name	Employee ID	Rate Number -	Effective Date	Hourly Rate
	Smith, Bill	15	1		10.00
	Curtis, Timothy	37	2		25.00
	Shit, Rad	28	2	10/27/2017	30.00
	Curtis, Timothy	37	3	11/16/2017	10.00

Page 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4

The **Alternate Rates** Dashboard displays any additional rates of pay the employees are receiving. This information flows over from Evolution Classic as part of the payroll cutover. You can also add other pay rates here and it will flow back into payroll and Evolution Classic. Click on an employee row to get their alternate rate detail information.

Alternate Rate: 1 -

Employee

Company
JCoz - Cozy Inn & Hamburgers (JCoz)

Employee
Clarkson, Lauren (47)

Alternate Rate Info

Rate Number
1

Start Date
Start Date *

End Date
End Date

Hourly Rate
\$ 18.00

Notes
Notes

To enter a new alternate rate record, click on the **+ New** button. Remember, any required fields display with a red asterisk.

When the green **New** button is clicked, a new record will popup:

Alternate Rate: NEW RECORD

Employee

Company: Shelburne Inn & Shoppes - Will (Will)

Employee: Please Choose (represents BLANK)

Select the **Employee** from the dropdown.

Alternate Rate Info

Rate Number: [Field]

Start Date: [Field]

End Date: [Field]

Hourly Rate: \$ [Field]

Notes: [Field]

Select:

- **Rate Number**
 - This is required
- **Start and End Date**
 - This is required
- **Hourly Rate**
 - This is required
- Add additional **Notes**

Any alternate rates you enter on this screen will by default not be set as the Primary Rate. The Rate Amount is 0.00 if nothing is entered.

Alternate Rates 👤 \$

+ New Download filter grid...

Actions	Name	Employee ID	Rate Number	Effective Date	Hourly Rate
[Icon]	Curtis, Timothy	37	1	10/19/2017	10.00
[Icon]	Smith, Bill	15	1		10.00
[Icon]	Curtis, Timothy	37	2		25.00

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

In the above screenshot, note the added Alternate Rate for Timothy Curtis.

Certificate

Provides a list of any certifications with the details displayed by clicking on a specific certification item row on the summary screen.

Certificates

+ New Download filter grid...

Actions	Name	Employee ID	Certificate Code -	Certificate Description	Issue Date	Expire Date	Cert #
	Dyer, Boris	2	Payroll	Payroll	11/10/2011	09/09/2017	30351354132035
	Forsyth, Megan	1	TAX	Taxidermy	09/03/2016	09/07/2017	84651351668

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

Certificate: **Payroll**

Employee

Company: Shelburne Farms 03 (SF03)

Employee: Dyer, Boris (2)

Certificate Info

Certificate Type: Payroll - Payroll

Issued By: CPAA

Certificate Number: 30351354132035

Issued Date: 11/10/2011

Notes:

Expiration Date: 09/09/2017

Employee Acknowledged: No Yes

Documents

Already Attached:

Browse or Drag/Drop documents:

Drag & drop files here ...

Temporarily Uploaded Documents:

Expiring Certification Notifications

Using the **Communications – Notifications** screen (**License & Certification** category) you can set up date-based expiring license and certification reminders targeted to the impacted employee.

Download filter grid...

License & Certification - License & Certification

Category -	Name	Active	Recipients	Delivery	Description
License & Certification	Achievement Expiration Date	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Target Employee - Reports To 1 - Employees: Dowd, Elwood (9)	Delivery occurs 1 day BEFORE the Target Date	Notifies recipients of an Employee's upcoming Achievement expiration date
License & Certification	Certificate Expiration Date	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Target Employee - Reports To 1 - Employees: Dowd, Elwood (9)	Delivery occurs 1 day BEFORE the Target Date	Notifies recipients of an Employee's upcoming Certificate expiration date
License & Certification	License Expiration Date	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Target Employee - Reports To 1 - Employees: Dowd, Elwood (9)	Delivery occurs 1 day BEFORE the Target Date	Notifies recipients of an Employee's upcoming License expiration date

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

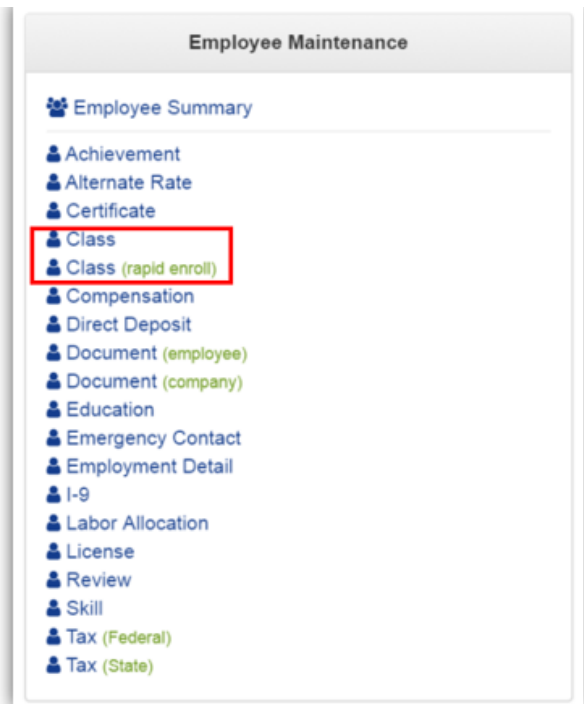
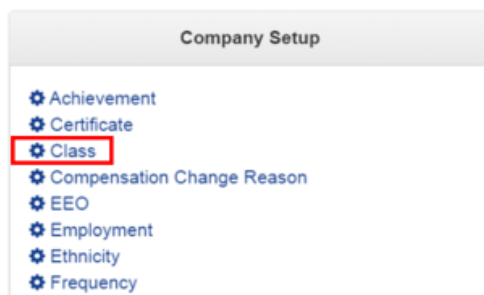
Date-Based Notifications are triggered by a date, such as for an expiring license. It's important to remember that Date-Based Notifications, unlike Event-based notifications, need to be set up and activated before they can be used. Refer to the *Advanced HR 2.0 Notifications Job Aid*.



Class and Class (Rapid Enroll)



Available Training Classes will appear in the employee’s **My HR** menu tab when they login to their Employee Dashboard. It is here that the employee will sign up for classes. These training classes need to be created first, however, and then made available to the employee. You can easily create classes, you can acknowledge it, and you can report on it (who signed up for a class, who acknowledged it, etc.).



Training classes allows the employee to sign up for classes. These training classes need to be created first, and then made available to the employee.

Let’s create a Training Class by going to **HR Admin - Company Setup - Class**:



Classes  

+ New  

Actions	Company	Class Title	Class Description	Class Time	Location	Class Is Open
	NCC1701 (do not touch)	Celestial Mechanics	Celestial mechanics is the branch of astronomy that deals with the motions of celestial objects. Historically, celestial mechanics applies principles of physics (classical mechanics) to astronomical objects, such as stars and planets, to produce ephemeris data.	06/01/2017 08:00 AM	Starbase 15	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes
	Shelburne Farms 03	Cheese Making in the 21st Century	Cheesemaking (or caseiculture) is the craft of making cheese, which dates back at least 5,000 years. Archaeological evidence exists of Egyptian cheese being made in the ancient Egyptian civilizations. The production of cheese, like many other food preservation processes, allows the nutritional and economic value of a food material, in this case milk, to be preserved. It allows the consumer to choose (within limits) when to consume the food rather than have to consume it straight away, and it allows the product to be altered which gives it higher value.	11/01/2017 09:00 AM	West Conference Room	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes

If the user is not locked into a company, they will see all the classes for all the companies that they have access to. If you don’t see the Class you are looking for, make sure that you are locked into a company.

To create a new class, click the green **New** button.

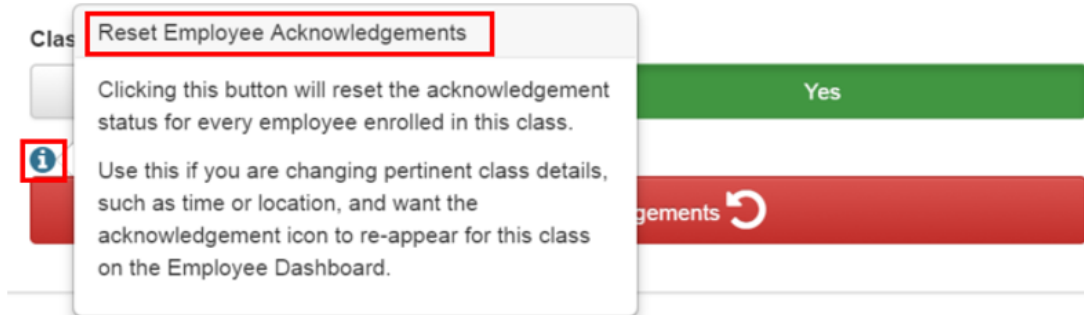
A New Record will popup where you can begin to create your class. As you can see from the above example, we are creating a **Fork Lift Operation** training class.

- If you haven't yet, select your **Company** from the dropdown.
- Give your class a **Title**.
- Give your class a **Description**.
- Enter any class details like start **Time** and **Location**, and maybe any **credits**.
- The **Class is Open** Yes/No toggle is where you make the class available for people to enroll in.

Enter the **Class Details**:

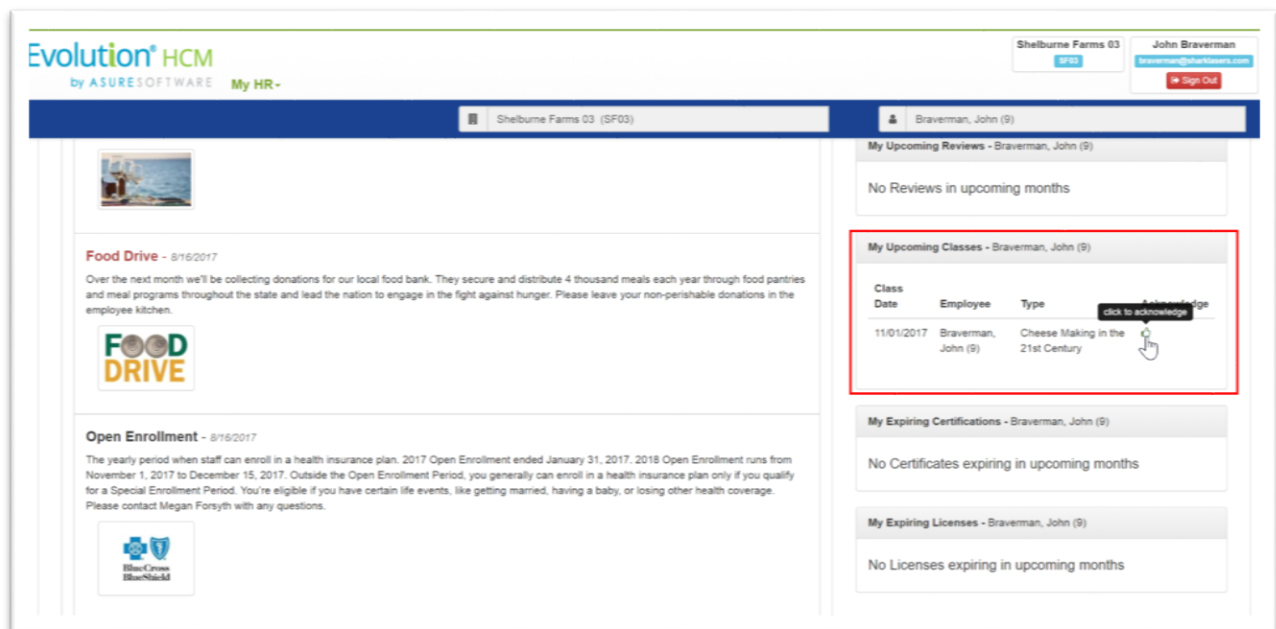
Note the blue 'i' information icon.

For any previously created Training Class, the user can **Reset the Employee Acknowledgements**.



Note that clicking on the “i” icon will open an information popup.

Classes can be **Acknowledged** by the employee on their Dashboard. Once a class is created, saved, and assigned to the employee, they can Acknowledge that they are going to attend the class. Below you can see a sample employee Dashboard with an acknowledgement icon showing in the **My Upcoming Training Classes** section of the screen.

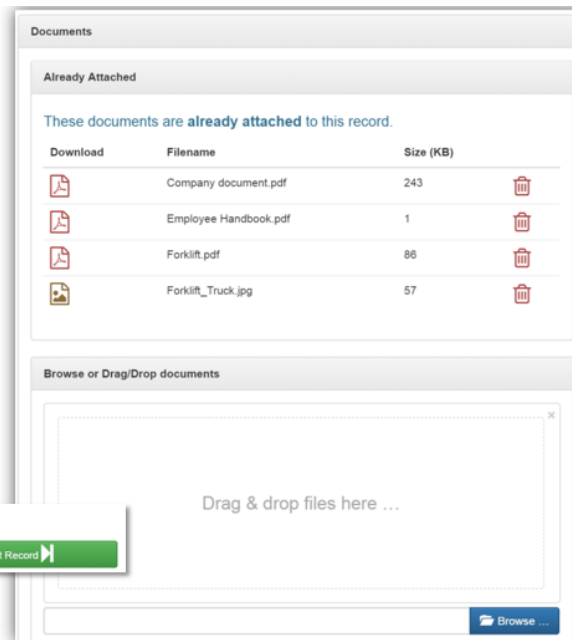


He can acknowledge that class. The system will then send a notification email to his manager that John B. just enrolled in this class.

You can also attach any related documentation for the class.

The final step is to attach documentation or images to the class. These will be available to the employee when they enroll.

Remember to click **Save Changes** when complete:



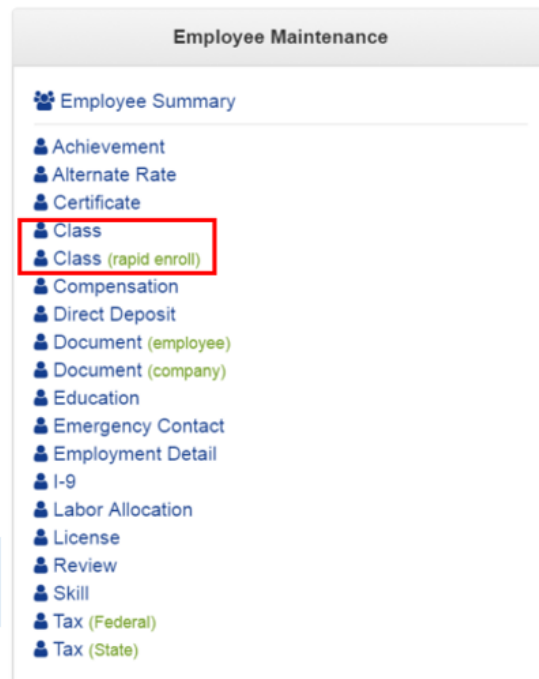
Assigning Training Classes to Employee(s)



There are two ways to enroll employees in Training Classes:



Go to **HR Admin menu tab- Employee Maintenance-Class** or **Class Rapid Enroll**.





Class Rapid Enroll allows the user to enroll multiple employees at once into a particular class.

Note: Unless the **Class** is assigned to the employee(s), they won't be enrolled.



Classes  

[+ New](#)  

Actions	Name	Employee ID	Title -	Description	Class Time	Expiration Date	Location
	Braverman, John	9	Cheese Making in the 21st Century	Cheesemaking (or caseiculture) is the craft of making cheese, which dates back at least 5,000 years. Archaeological evidence exists of Egyptian cheese being made in the ancient Egyptian civilizations. The production of cheese, like many other food preservation processes, allows the nutritional and economic value of a food material, in this case milk, to be preserved. It allows the consumer to choose (within limits) when to consume the food rather than have to consume it straight away, and it allows the product to be altered which gives it higher value.	11/01/2017 09:00 AM		West Conference Room
	Alfonse, Jamison	12	Cheese Making in the 21st Century	Cheesemaking (or caseiculture) is the craft of making cheese, which dates back at least 5,000 years. Archaeological evidence exists of Egyptian cheese being made in the ancient Egyptian civilizations. The production of cheese, like many other food preservation processes, allows the nutritional and economic value of a food material, in this case milk, to be preserved. It allows the consumer to choose (within limits) when to consume the food rather than have to consume it straight away, and it allows the product to be altered which gives it higher value.	11/01/2017 09:00 AM		West Conference Room
	Dyer, Boris	2	Cheese Making in the 21st Century	Cheesemaking (or caseiculture) is the craft of making cheese, which dates back at least 5,000 years. Archaeological evidence exists of Egyptian cheese being made in the ancient Egyptian civilizations. The production of cheese, like many other food preservation processes, allows the nutritional and economic value of a food material, in this case milk, to be preserved. It allows the consumer to choose (within limits) when to consume the food rather than have to consume it straight away, and it allows the product to be altered which gives it higher value.	11/01/2017 09:00 AM		West Conference Room
	Flack, Bob	8	Cheese Making in the 21st Century	Cheesemaking (or caseiculture) is the craft of making cheese, which dates back at least 5,000 years. Archaeological evidence exists of Egyptian cheese being made in the ancient Egyptian civilizations. The production of cheese, like many other food preservation processes, allows the nutritional and economic value of a food material, in this case milk, to be preserved. It allows the consumer to choose (within limits) when to consume the food rather than have to consume it straight away, and it allows the product to be altered which gives it higher value.	11/01/2017 09:00 AM		West Conference Room

The **Classes** Dashboard will show a list of which employees are enrolled in what classes. Click the green **New** button to enroll an employee in a class.

Enrolling One Employee in a Class:

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

Class: **NEW RECORD**

Employee

Company: Shelburne Farms 03 (SF03)

Employee: Braverman, John (9) ✓

Class Info

Class Type: Fork Lift Operation 101 - Any mobile power-propelled ✓

Grade or Result: Grade or Result

Completion Date: Completion Date

Expiration Date: Expiration Date

Employee Acknowledged: No (selected) Yes

Send Email notification to Employee?: No Yes

Notes:

Select the **Employee** you wish to enroll.

Select the **Class Type**.

Once enrolled, you can **Send an Email Notification**.

Remember to **Save Changes**.

You use this screen, not to create a new record, but to enroll an employee into a class. Select the Class from the **Class Type** dropdown. Since this is the first time enrolling the employee into the class, there is no acknowledgement yet. However, as a manager, you could come into this screen later to see if the employee ever did acknowledge the class. You can also set up a stock **Email notification to the**

employee for classes using a template editor in the **Company** tile. You can also enter any **Notes** about the class here. Once you click **Save Changes**, the employee is enrolled in the class.

Now that we've enrolled the employee, let's sign in as that employee and view what he sees:

The screenshot shows the Evolution HCM user interface for John Braverman. The 'My HR' menu item is highlighted. The 'My Personal History' section has 'My Classes' highlighted. The 'My Upcoming Classes' table shows two classes: 'Fork Lift Operation 101' and 'Cheese Making in the 21st Century', with the first one highlighted.

Class Date	Employee	Type	Acknowledge
11/01/2017	Braverman, John (9)	Fork Lift Operation 101	👍
11/01/2017	Braverman, John (9)	Cheese Making in the 21st Century	👍

For the employee, the **My Upcoming Classes** tile will display all classes that have been assigned to the employee. They can **Acknowledge** the class by clicking the “thumbs up” icon.

Rapid Enroll Method - Enrolling Multiple Employees in a Class

Rapid Enroll lets the user enroll multiple employees at once into a training class. It also allows you to assign grades or add notes to employees all at one time.

It's important to remember that Rapid Enroll cannot create a class. Its function is enrollment only.

Actions	Class Title	Class Description	Class Time	Location
	Taxidermy 101	Taxidermy is the preserving of an animal's body via stuffing or mounting for the purpose of display or study. Animals are often, but not always, portrayed in a life-like state. The word taxidermy refers to the process of preserving the animal, but the word is also used to describe the end product, which are often called "mounts". The word taxidermy is derived from the Greek words "taxis" and "derma". Taxis means "to move", and "derma" means "skin" (the dermis). The word taxidermy translates to "arrangement of skin". [1] Taxidermy is practiced primarily on vertebrates[2] (mammals, birds, fish, reptiles, and less commonly on amphibians) but can also be done to larger insects and arachnids[3] under some circumstances. Taxidermy takes on a number of forms and purposes, including natural history museum displays, hunting trophies, study skins, and is sometimes used as a means to memorialize pets. [4] A person who practices taxidermy is called a taxidermist. They may practice professionally for museums or as businesses catering to hunters and fishermen, or as amateurs, such as hobbyists, hunters, and fishermen. A taxidermist is aided by familiarity with anatomy, sculpture, painting, and tanning.	09/01/2017 08:00 AM	Conference Rm 5
	Fork Lift Operation 101	Any mobile power-propelled truck used to carry, push, pull, lift, stack or tier materials. Powered industrial trucks can be ridden or controlled by a walking operator. Earth moving and over the road haulage trucks are not included in the definition. Equipment that was designed to move earth but has been modified to accept forks are also not included. Operators must always maintain control of the forklift, keep a proper lookout, and operate the forklift at speeds safe for the particular operation and work site conditions.	11/01/2017 08:00 AM	Warehouse 5
	Cheese Making in the 21st Century	Cheesemaking (or caseiculture) is the craft of making cheese, which dates back at least 5,000 years. Archaeological evidence exists of Egyptian cheese being made in the ancient Egyptian civilizations. The production of cheese, like many other food preservation processes, allows the nutritional and economic value of a food material, in this case milk, to be preserved. It allows the consumer to choose (within limits) when to consume the food rather than have to consume it straight away, and it allows the product to be altered which gives it higher value.	11/01/2017 09:00 AM	West Conference Room

Go to the **Classes Rapid Enroll Dashboard** – this may be an easier and quicker method. In the above screenshot, we can see our **Fork Lift Operation 101** class. Click on it to open it.

Here is our **Fork Lift Operation 101** class with the attendee list. Use the **No/Yes** toggles to enroll as many employees as you would like. Remember to click **Save Changes** when complete.

Enrolled	Name	ID	Division / Branch / Department / Team / Position	Grade or Result	Notes
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Alfonse, Jamison	12	Farm Stand / Warehouse / Customer Service // Trainer	Grade	
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Braverman, John	9	Farm Stand / Warehouse / Customer Service / Alpha Team / Trainer	Grade	
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Dyer, Boris	2	//// Trainer	Grade	
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Fleck, Bill	8	Farm Stand / Warehouse / Customer Service // LT	Grade	
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Forsyth, Megan	1	//// CSM	Grade	

Notification Related to Employee Enrollment in Training Classes

Note that there is a Notification that Admins can set up to inform employees when they have been successfully enrolled in a training class or were enrolled by a manager/admin. Admins go to **HR Admin – Communications – Notifications** and select the **Classes Category**, to set up this item.

Notifications

Notification System is ON and ready for use

Download filter grid...

Classes - Classes and Training

Category	Name	Active	Recipients	Delivery	Description
Classes	Enrollment in Class	No Yes	Target Employee	Delivery when event occurs	Confirmation Email sent to Employee when they successfully enrolled or were enrolled by an Admin/Manager in a class.

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

Compensation

The Compensation screen displays the employee’s primary rate or salary amount. You can view all of the employee’s current and historical compensation changes.

Compensations

+ New Download filter grid... Advanced Filter

Actions	Name	Employee ID	Effective Date	Pay Type	Pay Rate	Change Reason
	Alfonse, Jamison	12	09/11/2017	Hourly	25.00	
	Samson, John	10	08/25/2017	Hourly	20.00	
	Braverman, John	9	08/14/2017	Hourly	10.00	
	Fleck, Bill	8	08/09/2017	Hourly	25.00	
	Webb, Chick	7	08/09/2017	Hourly	15.00	
	Shming, Dorothy	6	08/08/2017	Hourly	15.00	
	McBrittish, Rockford	4	08/08/2017	Hourly	25.00	
	Forsyth, Megan	1	08/02/2017	Hourly	20.00	
	Dyer, Boris	2	08/02/2017	Hourly	15.00	

Page: 1 of 1 Go Page size: 9 Change Item 1 to 9 of 9

Click on an employee to see the Compensation details screen.

Compensation: **Summers, Scott; 8/10/2017**

<p>Employee</p> <p>Company: Shelburne Farms 01 (SF01)</p> <p>Employee: Summers, Scott (5)</p>	<p>Compensation Info</p> <p>Effective Date: 08/10/2017</p> <p>Pay Type: E02 - Salary</p> <p>Rate (Hourly or Salary per pay period): \$ 55,000.00</p>	<p>Other Info</p> <p>Change Reason: Please Choose (represents BLANK)</p> <p>Comment:</p>
--	---	---

To add a new Compensation record, click the **+ New** button.

Compensation: NEW RECORD

<p>Employee</p> <p>Company Shelburne Farms 01 (SF01) ✓</p> <p>Employee Summers, Scott (5)</p>	<p>Compensation Info</p> <p>Effective Date Effective Date *</p> <p>Pay Type Please Choose (represents BLANK) *</p> <p>Rate (Hourly or Salary per pay period) \$ Rate *</p>	<p>Other Info</p> <p>Change Reason + Please Choose (represents BLANK)</p> <p>Comment Comment</p>
--	---	---

A compensation in Advanced HR 2.0 corresponds with the **Employee - EE Entry - Pay** section in Evolution Classic.

It is comprised of both a salary amount, and a primary hourly rate. Salary amount is optional, but hourly can be 0.00 (still mandatory)

By default, for an employee that doesn't have an hourly rate the API needs to submit a rate number (defaults to 1 on the screen, but can be changed) and an hourly rate of 0.00.


DBDT's, WC, Jobs etc., can all be associated to a pay rate. For example, an employee can be both a waiter and a bartender and have different rates at each.

Direct Deposit

Base Users have the ability to add their Direct Deposits, whether for one bank account or multiple accounts. When an employee submits their Direct Deposit allocations 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. In addition, **Base Managers** and **Base Admins** have the ability to enter Direct Deposit information for employees.

Note: **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.

Go to **HR Admin – Employee Maintenance – Direct Deposit**. Lock in on a **Company** and an **Employee**. You'll be taken to the **Direct Deposit dashboard**. Any Direct Deposits that were previously created, or part of the Payroll Data Cutover, will be displayed in the dashboard

Direct Deposits 

+ New Download Advanced Filter

Actions	Name	Emp ID	Start Date	End Date	Routing	Account	Account Type	Status
	Oldman, Sally	15	12/26/2017		107000327	1365136516	Checking	Pending
	Forsyth, Megan	1	01/03/2018		107000327	216546	Checking	Pending
	Braveman, John	9	01/03/2018		107000327	64163136501	Checking	Pending

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

Click on the **+ New** button to add a new direct deposit record.

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:

Amount Code: Percentage ✓

Amount: 100.00 ✓

Details

Deduction Info

Enter the following information:

- Routing Number
- Account Number
- Start Date
- Amount Code
 - Percentage
 - Balance/Remainder
 - Flat Amount
 - Live Check Amount
- Amount of Deposit

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 the **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

You'll be taken to the Direct Deposit dashboard. Remember, that since you are logged in as a **Base Admin**, you can see all the Direct Deposits for the entire company. Click on the name of the employee that has a **Pending** status:

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

Deposit: 5165164685

Employee

Company: WR Shelburne Inn & Shoppes (Will)

Employee: Arpuvian, Samson (134)

Bank Info

Routing Number:

Account #:

Account Type

Checking: Yes No

Savings: Yes No

Money Market: Yes No

Transaction Info

Start Date:

End Date:

Amount Code: Percentage

Amount:

Details

Prenote?: No Yes

Deduction Info

Deduction Code: D01 - Net Pay Direct Deposit

Approval Status: Approved

You have the ability to edit any information. However, you'll need to enter a **Deduction Code** and change the **Status** to **Approved**. Click **Save Changes** when complete.

Once approved, the Direct Deposit will be active.



Direct Deposit Notifications



The following table lists the **Notifications** that employees and Admins/Managers may receive related to Direct Deposits, if these have been activated.





















Notification Name	Description
Request Submitted	Sent to Employee to let them know their request is successfully submitted.
New Request	Sent to the people responsible to review and approve new direct deposit requests when they are submitted.
Request Rejected	Sent to the Employee to let them know their direct deposit request is rejected.
Request Approved	Sent to the Employee to let them know their direct deposit request is rejected.

Document (Employee)

You can view, print, save, and add documents to the employee’s “electronic personnel folder.”

Documents (employee)  

[+ Add Documents](#)  

Actions	Name	Employee ID	Download	Filename	Category	Title	Upload Date	Size (KB)	Upload By	Private
	Allagash, Cranston	32		formbackgroundcheckauth.pdf e-signed by: Cranston Alegash on 01/30/2018 03:48 PM	Onboarding-Background Check Auth	FormBackgroundCheckAuth	01/30/2018 03:49 PM	505	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Portabello, Ignacio	33		formbackgroundcheckauth.pdf e-signed by: Ignacio Portabello on 02/02/2018 03:57 PM	Onboarding-Background Check Auth	FormBackgroundCheckAuth	02/02/2018 03:58 PM	505	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Clickstop, Wilbaforce	34		formbackgroundcheckauth.pdf e-signed by: Wilbaforce Clickstop on 02/05/2018 12:20 PM	Onboarding-Background Check Auth	FormBackgroundCheckAuth	02/05/2018 12:23 PM	506	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Clickstop, Wilbaforce	34		formdirectdeposit.pdf e-signed by: Wilbaforce Clickstop on 02/05/2018 12:19 PM	Onboarding-Direct Deposit	FormDirectDeposit	02/05/2018 12:23 PM	116	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Allagash, Cranston	32		formw4.pdf e-signed by: Cranston Alegash on 01/30/2018 03:47 PM	Onboarding-W4	FormW4	01/30/2018 03:49 PM	695	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Portabello, Ignacio	33		formw4.pdf e-signed by: Ignacio Portabello on 02/02/2018 03:56 PM	Onboarding-W4	FormW4	02/02/2018 03:58 PM	694	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Clickstop, Wilbaforce	34		formw4.pdf e-signed by: Wilbaforce Clickstop on 02/05/2018 12:19 PM	Onboarding-W4	FormW4	02/05/2018 12:23 PM	696	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Allagash, Cranston	32		i9_sec1.pdf e-signed by: Cranston Alegash on 01/30/2018 03:48 PM	Onboarding-I9	FormI9	01/30/2018 03:49 PM	759	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Portabello, Ignacio	33		i9_sec1.pdf e-signed by: Ignacio Portabello on 02/02/2018 03:56 PM	Onboarding-I9	FormI9	02/02/2018 03:58 PM	758	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Clickstop, Wilbaforce	34		i9_sec1.pdf e-signed by: Wilbaforce Clickstop on 02/05/2018 12:20 PM	Onboarding-I9	FormI9	02/05/2018 12:23 PM	760	Onboarding	<input type="checkbox"/> No <input type="checkbox"/> Yes



Page: 1 of 1 Go Page size: 10 Change Item 1 to 10 of 10

Document: Key to the city.pdf




<p>Employee</p> <p>Company</p> <p>Shelburne Farms 03 (SF03)</p> <p>Employee</p> <p>Braverman, John (9)</p>	<p>Category</p> <p>Category</p> <p>Title</p> <p>Description</p>
<p>Info</p> <p>Filename</p> <p>Key to the city.pdf</p> <p>Size (KB)</p> <p>84</p> <p>Upload Date Eastern</p> <p>08/17/2017 07:54 AM</p> <p>Uploaded By</p> <p>wroberts@evolutionhcm.com</p>	<p>Attributes</p> <p>Private Document</p> <p>No Yes</p>

Document (Company)

View and print any documents that the 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
	Benefit packages.pdf	Benefits	Benefit Packages Summary	10/03/2017 10:26 AM	90	Will.R. _ esoftware.Com	No Yes
	Employee Handbook.pdf			09/11/2017 12:43 PM	1	wro _ cm.com	No Yes
	Letter from the CEO.pdf			08/24/2017 02:22 PM	1	wr _ cm.com	No Yes

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

Education

Provides details about an employee's education, including the code, description, and the name of the educational institution.

Education  

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

Actions	Name	Employee ID	Education Code	Education Description	Institution
	Forsyth, Megan	2	Bachelor	Bachelor's degree	UC-Davis

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

To add a new education record for the employee, click the green **+ New** button and complete the details.

Education: NEW RECORD

Employee

Company
MB Winery (MB01)

Employee
Please Choose (represents BLANK)

Education Info

Education Type
Please Choose (represents BLANK)

Institution
Institution

Major
Major

Minor
Minor



Completed Date
Completed Date



GPA
GPA



Notes
Notes

Emergency Contact

Provides details concerning emergency contact information for the employee.

Emergency Contacts  

+ New   Filter grid...

Actions	Name	Employee ID	Contact Type	Contact First	Contact Last
	Forsyth, Megan	2	Spouse	Michael	Harper
	Forsyth, Megan	2	Mother	Jane	Forsyth

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

To add a new contact for an employee, click the **+ New** button and complete the information on the screen.

Employee

Company
MB Winery (MB01)

Employee
Please Choose (represents BLANK)

Contact

Contact Type
Contact Type *

Priority
Priority

First Name
First Name *

Middle Name
Middle Name

Last Name
Last Name *

Contact Address

Address Line 1
Address Line 1

Address Line 2
Address Line 2

City
City

State
Please Choose (represents BLANK)

Contact Details

Email
your_email@domain.com

Home Phone
123.456.7890 x123

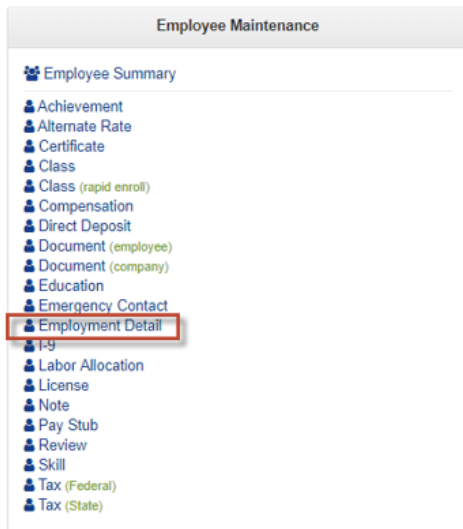
Work Phone
123.456.7890 x123

Cell Phone
123.456.7890 x123

Employment Detail

Provides complete details on the employee’s Position/Status, Organization assignment, Compliance details, and Supervisor assignment(s), literally all the employee’s employment details. From **Effective Dates**, to **DBDT** assignments, to **Benefits**, to who Supervises the employee. Most of this information will migrate from Evolution Classic to Advanced HR 2.0 when the Payroll Data Cutover is performed. Initially however, you will want to set up the **Reports To/Supervisor** section/field of the screen.

Go to **HR Admin – Employee Maintenance – Employment Detail**.



When selected, the **Employment Detail** will open a Dashboard that will allow for:

- New hire/Termination
- Position Organization
- Rehiring
- Effective Dating

Tip: This screen is best used by locking into a specific employee with the employee search bar at the top of the screen or the dropdown.



As you can see from the left side of the following screenshot, this is also where you can initiate a **New Hire** or **Termination** process. In addition, the **Add a Position/Organization** section to the right allows you to Re-Hire an inactive employee or modify an active employee’s Position/Organization records.

To access an employee’s record, select them from the **Employee** dropdown at the top of the screen and click the **Let’s begin adding a Position/Organization** button.

Scroll down the **Position/Status** tile and the **Reports To/Supervisor** tile:

1. Enter specific **Position** information.
2. Build an organizational structure by assigning **Managers** and **Supervisors**.
3. If a Manager is assigned in the **Reports To** dropdown, when they login, they will have access to some of the employee’s pertinent information, including Acknowledgment functionality.

Note: The **Supervisor (SC)** field can be used as a user defined text representation of the Supervisor. It can also be used as an option in various **Time Clock Integrations** such as Swipe Clock.

Employment Detail Dashboard

On the **Employment Detail** dashboard, a list of the history of all the employee changes, and or, updates that have occurred will be displayed.

Actions	Name	Emp ID	Eff Date	Position	Organization Structure <small>Division, Branch, Department, Team</small>	Status	Reports To 1	Hire	Term
	Shirt, Red	28	12/26/2017	NA	Main Office, Human Resources, HR Manager	Active	Kirk, Jim	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Smith, Kevin	9	12/13/2017	Security Guard	Shelburne Inn Store, Brewery, Forklift Driver	Active		<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Telosian, Veena	29	12/13/2017	NA	Main Office, Human Resources, HR Manager	Active	McCoy, Emily	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Smith, Jameson	27	11/14/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes

Note: Depending on the change, multiple entries for employees may be visible with the corresponding effective date (**Eff Date** column). This point has caused some confusion among users – this is not an indication that the system has created a duplicate record by mistake.

Actions	Name	Emp ID	Eff Date	Position	Organization Structure <small>Division, Branch, Department, Team</small>	Status	Reports To 1	Hire	Term
	Shirt, Red	28	12/26/2017	NA	Main Office, Human Resources, HR Manager	Active		<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Smith, Jameson	27	11/13/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Smith, Jameson	27	10/11/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes

If you would like to add a Position/Organization record, please choose a company and employee to give a better context for the effective date that you will be choosing. We will be copying information from the previous effective dated record, so please keep that in mind when choosing an effective date. You cannot pick a date that would become the first historical dated record for this employee. Also remember that it is NOT a good idea to have multiple records for the same employee on the same day. The system can get confused on which one should be current/active.

If you wish to re-hire (or add any record) for an inactive employee, please use the top employee search to find the inactive employee rather than the dropdown selection.

I-9 Screen

The I-9 screen is the standalone electronic I-9 process. The I-9 screen allows HR staff to update and e-sign the employer portion of the I-9 form. The I-9 screen lists all the employees for the company and indicates their I-9 Status. The employer has full control as to when to allow employees to be able to access their I-9 Form.

All the I-9 information is stored *on* the employee record itself.

- The employee self onboards and completes Section 1 of the I-9
- Admins/Managers *cannot* do anything with **Section 1**, other than marking it (manually) as **Complete/Incomplete** and Assigning it to the employee. By “assigning it”, it displays for the Employee to do, fix, update, or complete **Section 1** (also assuming it is *not* marked as **Complete** already).
- Similarly, employee (self service) cannot access **Section 2** of the I-9. **Section 2** is only accessible for the Admins / Managers and for Section 2's that are not already complete.

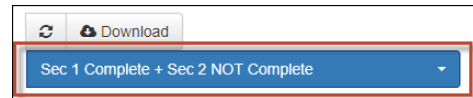
Name	Employee ID	Hire Date (orig)	I-9 Status	I-9 Assigned	Status	Employment	Position
Smithers, Jackson	13	09/28/2017	Section 1 9/28/2017 Incomplete	No Yes	Active	Full Time	Trainer

To access the employer ID portion of the I-9 screen:

1. Go to **HR-Admin – Employee Maintenance – I-9**.
2. The system displays the **I-9** screen.

Name	Employee ID	Hire Date (orig)	I-9 Status	I-9 Assigned	Status	Employment	Position
Hovis, Chris	193	08/14/2017	Section 1 8/15/2017 Incomplete	No Yes	Active	Regular Full Time	Sales Representative
Esposito, Betteanne	190	08/08/2017	Section 1 8/8/2017 Incomplete	No Yes	Active	Regular Full Time	CFO
Mason, Victor	187	08/03/2017	Section 1 8/3/2017 Incomplete	No Yes	Active	Regular Full Time	Accounting
Esposito, Betteanne	184	08/02/2017	Section 1 8/2/2017 Incomplete	No Yes	Active	Regular Full Time	Sales Representative
Rees, Wendy	178	07/18/2017	Section 1 7/18/2017 Incomplete	No Yes	Active	Regular Full Time	Accounting

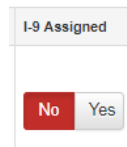
The filter at the top left of the I-9 screen allows the **Admin/Manager** to filter the types of I-9 Status to show. You can select the following views:



- All Sec 1 + Section 2 Status
- Sec 1 NOT Complete
- Section 1 Complete + Section 2 Not Complete - this is the default view but you can change it.

I-9 Assigned Field

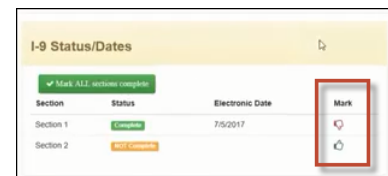
You can use the **I-9 Assigned** column field to open the **Section 1** of the I-9 Form in order for the employee to do something to their I-9, for example if the employee didn't fill out the I-9 during onboarding.



In the **I-9 Assigned** column – change the **Yes / No** toggle switch from **No** to **Yes** to assign the I-9 task to the employee. The system assigns the I-9 to the employee and sends an email to the employee indicating a request to go fill out or complete their I-9 document which includes a link for the employee to click – a sample email notification is shown below.



To do this, **you also need to change the Status** of the I-9 from **Complete** to **Not Complete** in order to be able to assign a completed I-9 back to the employee. You can do this manually, in the **I-9 Status/Dates** section of the screen, in the **Mark** column, by clicking on the Thumbs Up/Down icons to mark it as **Not Complete** (or click on the Thumbs Up/Down icons to mark it as **Complete**).



Here is an example where the **Admin** has assigned the I-9 back to the employee. When the employee logs into their **My HR** screen (**I-9**), he/she can click on their assigned I-9 task (indicated by the **Yes** toggle in the **I-9 Assigned** column).

Hire Date (orig)	I-9 Status	I-9 Assigned	Status	Employment	Position
07/04/2017	Section 1: Incomplete Section 2: Incomplete	No: Yes	Active	Full Time	Field Engineer

- To return to our example, you click on an employee row on the summary screen to see the actual I-9 details of that employee.

Shelburne Farms 03 (do not touch) - Smithers, Jackson (13)

Status:	Active	Hire Date:	09/28/2017	Employment:	Full Time	Division:	
Tax Form:	W2	Termination Date:		Position:	Trainer	Branch:	
						Department:	
						Team:	

I-9 Status/Dates

✓ Mark ALL sections complete

Section	Status	Electronic Date	Mark
Section 1	Complete	9/28/2017	🔔
Section 2	NOT Complete		👍

I-9 Documents

Download	Filename	Size (KB)	Date	Remove Link
📄	i9_sect1.pdf	760	09/28/2017	🗑️

Document

Please Choose (represents BLANK)

🔗 Link I-9 document

I-9 Instructions

For complete instructions and I-9 document reference, please use these:

[I-9 Document Link](#)
[I-9 Instructions \(english\)](#)
[I-9 Instructions \(spanish\)](#)

E-Verify

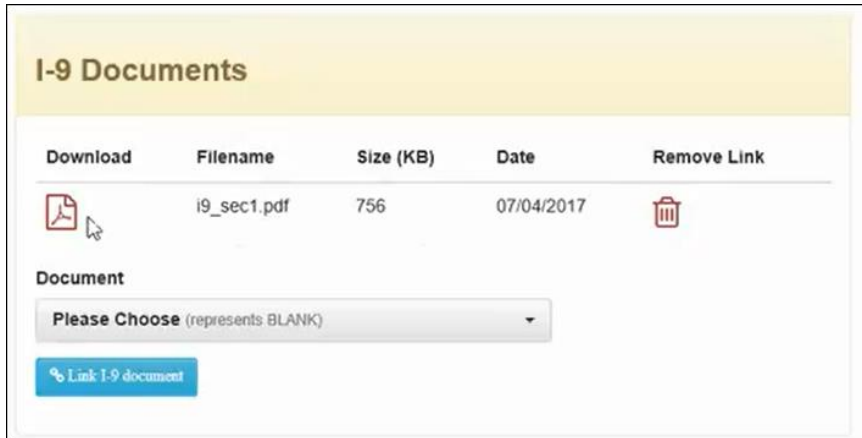
[E-Verify Site/Information](#)
[E-Verify Site Login](#)

The top section of the I-9 screen contains the employee I-9 information, links to the I-9 Instructions and to E-Verify and to the physical I-9 Documents which you can click on such as the actual I-9 Section 1 portion that the employee completed.

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Asure Software

3/22/2018



I-9 Section 1

The employee completes Section 1 of the screen. The employer does not have access to Section 1.

I-9 Section 1

<p>Name/Address</p> <p>First Name Jackson</p> <p>Middle Initial N/A</p> <p>Last Name Smithers</p> <p>Other Names Used N/A</p> <p>Address 25 Main St</p> <p>Apartment N/A</p> <p>City Anytown</p> <p>State VT - VERMONT, US</p> <p>Zip Code 05103</p>	<p>ID/Contact</p> <p>SSN 123-45-6789</p> <p>Birthdate 11/19/1990</p> <p>Email your.email@domain.com</p> <p>Phone 123.456.7890 x123</p>	<p>Status</p> <p>US Citizen No Yes</p> <p>Non-Citizen national (US) No Yes</p> <p>Lawful permanent resident No Yes</p> <p>USCIS # N/A</p> <p>Alien Registration # (should start with "A") N/A</p> <p>Alien authorized to work No Yes</p> <p>Work Expiration Date Work Expiration Date</p> <p>USCIS # N/A</p> <p>Alien Registration # (should start with "A") N/A</p>
---	--	---

<p>OR</p> <p>Form I-94 Admission # I-94 #</p> <p>OR</p> <p>Foreign Passport # Foreign Passport #</p> <p>Country Of issuance Please Choose (represents BLANK)</p>
--

E-Signature

Type your name here
Jackson Smithers

Form Date
09/28/2017

Jackson Smithers

Preparer and/or Translator Certification

Did a preparer and/or translator assist the employee in completing Section 1 ?

No Yes

Save and Generate I-9 (Sec 1)

Providing your 9-digit Social Security Number is voluntary on Form I-9 unless your employer participates in E-Verify.

If your employer participates in E-Verify and:

1. You have been issued a Social Security number, you must provide it in this field; or
2. You have applied for, but have not yet received a Social Security number, leave this field blank until you receive a Social Security number.

I-9 Section 2

The common workflow is the **Admin/Manager** will display the Section 2 section of the I-9 screen to complete the employer portion. The employee does not have access to Section 2. The screen mimics the online Smart I-9 Form.

I-9 Section 2

List A Identity and Employment Authorization	List B Identity	List C Employment Authorization
<p>Document Title Please Choose (represents BLANK)</p> <p>Issuing Authority Please Choose (represents BLANK)</p> <p>Document Number Document #</p> <p>Expiration Date Expiration Date</p>	<p>Document Title Please Choose (represents BLANK)</p> <p>Issuing Authority Please Choose (represents BLANK)</p> <p>Document Number Document #</p> <p>Expiration Date Expiration Date</p>	<p>Document Title Please Choose (represents BLANK)</p> <p>Issuing Authority Please Choose (represents BLANK)</p> <p>Document Number Document #</p> <p>Expiration Date Expiration Date</p>
<p>Additional Information</p> <p>Additional Information</p>		

<p>Document Title Please Choose (represents BLANK) ▾</p> <p>Issuing Authority Please Choose (represents BLANK) ▾</p> <p>Document Number Document #</p> <p>Expiration Date Expiration Date </p> <hr/> <p>Document Title Please Choose (represents BLANK) ▾</p> <p>Issuing Authority Please Choose (represents BLANK) ▾</p> <p>Document Number Document #</p> <p>Expiration Date Expiration Date </p>	<p style="text-align: center;">Additional Information</p> <p>Additional Information</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <hr/> <p style="text-align: center;">Attestment</p> <p>I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.</p> <p style="text-align: center;"> <input type="button" value="No"/> <input type="button" value="Yes"/> </p>
---	--

Employer/Representative	
<p>Employee's first day of employment Employment Date * </p>	
<p>Employer or Authorized Representative</p> <p>Title Title *</p> <p>First Name First Name *</p> <p>Last Name Last Name *</p>	<p>Business/Organization</p> <p>Business Name Business Name *</p> <p>Address Address *</p> <p>City City *</p> <p>State Please Choose (represents BLANK) * ▾</p> <p>Zip Zip *</p>

The **Admin/Manager** clicks **Yes** to the **Attestment** section, signs the **E-Signature** section and clicks the **Save and Generate I-9 (Sec 2)** button.

E-Signature	
<p>Type your name here</p> <p>E-Sign Name *</p> <div style="border: 1px solid gray; height: 20px; width: 100%;"></div>	<p>Form Date</p> <p>08/09/2017 </p>
<p> Save and Generate I-9 (Sec 2) </p>	

The system then generates the document and you can see it now listed in the **I-9 Documents** section of the screen at the top.

Download	Filename	Size (KB)	Date	Remove Link
	i9_sec1_sec2.pdf	770	07/05/2017	
	i9_sec1.pdf	756	07/04/2017	

I-9 Related Employee Notification

Admins can set up a Notification to inform an employee that they are being asked to complete an I-9 document. Go to **HR Admin – Communications – Notifications** and select the **Compliance Category**.

Category	Name	Active	Recipients	Delivery	Description
Compliance	I-9 Assignment	No Yes	Target Employee	Delivery when event occurs	Employee being asked to complete I-9 document

Labor Allocation

Actions	Name	Emp ID	Start Date	End Date	%	Allocated To
	Mandrake, Lionel	13	02/15/2017	02/15/2018		Division: Retail

Click on a row to display the Details screen.

Allocation: Mandrake, Lionel; Division: Shelburne Inn Store; 0%



Employee Company Will's Other Company (Will 2)	Labor Allocation Info Division Retail - Shelburne Inn Store
Employee Mandrake, Lionel (13)	Job Please Choose (represents BLANK)
Basic Info Start Date 02/15/2017	
End Date 02/15/2018	
Percentage %	


Allocation: NEW RECORD


Employee Company Shelburne Farms 03 (SF03)	Labor Allocation Info Division Please Choose (represents BLANK)
Employee Please Choose (represents BLANK)	Branch Please Choose (represents BLANK)
Basic Info Start Date Start Date	
End Date End Date	
Department Please Choose (represents BLANK)	
Job Please Choose (represents BLANK)	
Percentage %	

License

Provides access to details on any license - including expiration dates and any attached documents.

Licenses  

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

Actions	Name	Employee ID	License Code -	License Description	Issue Date	Expire Date	License #
	Forsyth, Megan	1	TAX	Taxidermy	02/19/2015	09/23/2017	56165461335136485

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

License: TAX

Employee

Company
Shelburne Farms 03 (SF03)

Employee
Forsyth, Megan (1)

License Info

License Type +
TAX - Taxidermy

License Number
56165461335136485

Issued By
TAA

Issued Date
02/19/2015

Expiration Date
09/23/2017

Notes
Notes

Employee Acknowledged
 No Yes

Click on the + **New** button to add a new license record for the employee.

License: NEW RECORD

Employee

Company
Shelburne Farms 03 (SF03)

Employee
Please Choose (represents BLANK)

License Info

License Type +
Please Choose (represents BLANK)

License Number
License Number

Issued By
Issued By

Issued Date
Issued Date

Expiration Date
Expiration Date

Notes
Notes

Employee Acknowledged
 No Yes

Expiring License Notifications



Using the **Communications – Notifications** screen (**License & Certification** category) you can set up date-based expiring license and certification reminders targeted to the impacted employee.



Category	Name	Active	Recipients	Delivery	Description
License & Certification	Achievement Expiration Date	No Yes	Target Employee – Reports To 1 – Employees: Dowd, Elwood (9)	Delivery occurs 1 day BEFORE the Target Date	Notifies recipients of an Employee's upcoming Achievement expiration date
License & Certification	Certificate Expiration Date	No Yes	Target Employee – Reports To 1 – Employees: Dowd, Elwood (9)	Delivery occurs 1 day BEFORE the Target Date	Notifies recipients of an Employee's upcoming Certificate expiration date
License & Certification	License Expiration Date	No Yes	Target Employee – Reports To 1 – Employees: Dowd, Elwood (9)	Delivery occurs 1 day BEFORE the Target Date	Notifies recipients of an Employee's upcoming License expiration date

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3


Note

Admins / Managers can use the **Note** screen as a direct method to communicate to an employee and leave a record of the communication in the system.

Notes  

+ New   Download

filter grid...

Actions	Name	Employee ID	Date	Title	Description
	Braverman, John	9	12/04/2017	Did you know?	You were supposed to work today.

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

Click on a row to display the Details screen.

Note: Did you know?

Employee

Company
Shelburne Farms 03 (SF03)

Employee
Braverman, John (9)

Note Info

Note Date
12/04/2017

Title
Did you know?

Description
You were supposed to work today.

To create a new note:

From the **Notes** screen, click on the **+ New** button.

Note: NEW RECORD

Employee

Company
Please Choose (represents BLANK)

Employee
Please Choose

Note Info

Note Date
12/28/2017

Title
Title

Description
Description

Select the **Employee** and **Company**, if not already selected.

In the **Note Info** section:

The Note **Date** defaults to today's date; you can change it using the calendar icon.

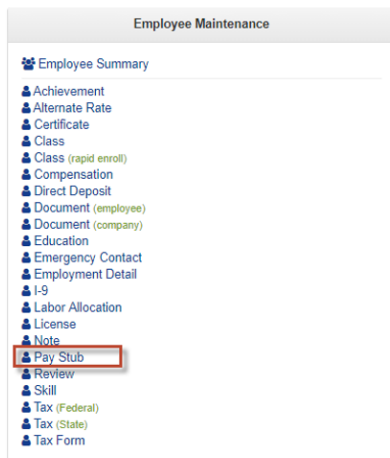
Enter a **Title** for the Note.

Enter the text for the note in the **Description**.

Click **Save**.

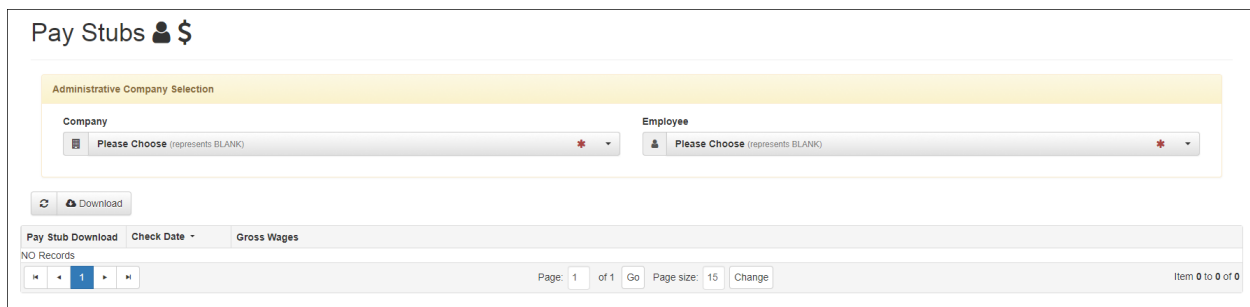
Pay Stub

Use the **Pay Stub** menu option to see and download a PDF version of an employee's pay stub.



Go to **HR Admin – Employee Maintenance – Pay Stub**

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





Select the **Company** and the **Employee** for which you want to display the Pay Stub for in the **Company** and **Employee** dropdowns. If you were already locked into a **Company**, then just select the **Employee**.

The system displays a screen listing the **Pay Stubs Dashboard** for that employee which are available to download as a PDF.

Pay Stub Download	Check Date	Gross Wages
	06/30/2017	2,433.03
	06/16/2017	2,840.49
	06/02/2017	2,339.84
	05/19/2017	2,339.84
	05/05/2017	2,339.84

Click on the Pay Stub check date row 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 ^		

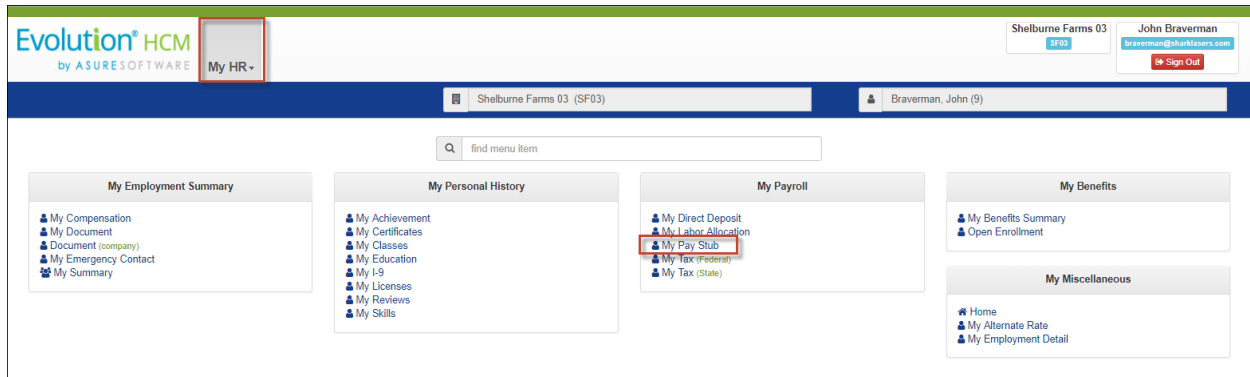
Click on the PDF icon to display or download the PDF file to your machine. The system displays the PDF of the employee's pay stub.

Earnings		Deductions						
Description	Location / Job	Rate	Hours/Piec	Current	Year To Date	Description	Current	Year To Date
Regular		0.00	63.00	0.00	0.00	Fed (M/0) (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/0) (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
		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	Check Amount	0.00	3529.02

You can print or save the pay stub file.

Base User

For a **Base User**, after the payroll has been run, they will be able to access their Pay Stubs. The Base User will go to their **My HR** menu tab - **My Payroll** - **My Pay Stub**:



When clicked, **My Pay Stub** will display the **Pay Stubs Dashboard**:

The screenshot shows the 'Pay Stubs' dashboard. It features a title 'Pay Stubs' with a person icon and a dollar sign. Below the title is a 'Download' button. The main content is a table with three columns: 'Pay Stub Download', 'Check Date', and 'Gross Wages'. The 'Pay Stub Download' column contains PDF icons. The 'Check Date' column shows dates from 03/25/2016 to 07/29/2016. The 'Gross Wages' column shows a value of 5,000.00 for each entry. A pagination bar at the bottom shows '1' of 1 items.



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


The Pay Stubs Dashboard will allow the employee to:



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

Review

You can view a list of the employee's 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
	Buck, Joe	12	Dowd, Elwood	02/15/2018	Scheduled	6 month review
	Lebowski, Maude	10	Dowd, Elwood	02/15/2018	Scheduled	6 month review

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


Review: 6M

Employee

Company
Will's Other Company (VII 2)

Employee
Buck, Joe (12)

Review Info

Review Type 
6M - 6 month review

Status
S - Scheduled

Reviewer
Dowd, Elwood (9)

Scheduled Date
02/15/2018

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

Details

Review Notes

Notes

Private Notes

Private Notes

Review Template

Review Template

Review Template (from Review Type).

Documents

Already Attached

Skill

View a comprehensive list of all skills the employee has achieved. Clicking on an individual skill on the summary screen provides basic details of the specific skill.

The screenshot shows the 'Skills' management interface. At the top, there are icons for 'New' and 'Download', and a search filter labeled 'filter grid...'. Below this is a table with columns for 'Actions', 'Name', 'Employee ID', 'Skill Code', and 'Skill Description'. The table currently shows 'NO Records'. At the bottom of the table area, there is a pagination control showing 'Page: 1 of 1', 'Go', 'Page size: 15', 'Change', and 'Item 0 to 0 of 0'.

The screenshot shows the 'Skill: NEW RECORD' form. It is divided into several sections:

- Employee:** Contains dropdown menus for 'Company' (Shelburne Farms 03 (SF03)) and 'Employee' (Please Choose (represents BLANK)).
- Skill Info:** Contains a 'Skill Type +' dropdown (Please Choose (represents BLANK)), a 'Notes' text area, a 'Proficiency Percentage' field with a '%' symbol, and a 'Years of Experience' field with 'Experience in Years' text.
- Documents:** A section with three sub-panels:
 - 'Already Attached': An empty list box.
 - 'Browse or Drag/Drop documents': A large dashed box with the text 'Drag & drop files here ...'.
 - 'Temporarily Uploaded Documents': An empty list box.

Tax - (Federal)

Select **HR Admin – Employee Maintenance – Tax (Federal)** to display/add an employee’s Federal Tax information.

Federal Taxes 👤💰

Download

Employee Name -	Employee ID	Marital Status	Tax Type	Exemption Type	Exemptions
Hunter, Hannah	14	Single	63	AdditionalAmount	800.0
Allan, Sophia	15	Married	W2	None	0.0
Alsop, Ahanu	7	Single	W2	None	
Anders, Kimmy	7940	Single	W2	None	0.0
Auto TOA, Test	7901	Single	W2	None	
Barnes, Sean	1984	Single	W2	None	0.0
Black, Jessica	36	Married	W2	None	
Black, Tom	7922	Single	W2	None	0.0
Blake, Anne	16	Married	W2	None	

Click on an employee row to get the Federal Tax detail information.

Tax Info: Jameson T Smith - 27

Details

Federal Marital Status:

Allowances:

Federal Tax Type:

Amount: \$

Annual Tax Form

Tax Form:

Residential State:

Legal Name

First Name:

Middle Name:

Last Name:

Suffix:

W-2 Settings

Deceased: No Yes

Legal Representative Designated: No Yes

Deferred Compensation: No Yes

Statutory Employee: No Yes

Pension: No Yes

Overrides and Exemptions

Employee Tax Statuses

Federal Tax Status
Include - Withhold tax

OASDI Exempt
 No Yes

Medicare Exempt
 No Yes

Employer Tax Statuses

FUI Rate Credit Override
\$ 0.00

FUI Exempt
 No Yes

OASDI Exempt
 No Yes

Medicare Exempt
 No Yes

Tax - (State)

Select **HR Admin – Employee Maintenance – Tax (State)** to display/add an employee’s State Tax information.

State Taxes 👤 \$

Employee

Employee
👤 Shirt, Red (28) ✓

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

Actions	State	SUI State	SDI State	Marital Status	Tax Exemptions
🗑️	VT	VT	VT	Single	1

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

Tax Info: Red S Shirt - 28

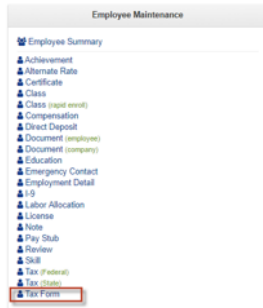
Details Earnings State: VT - VERMONT County: <input type="text"/> SUI State: VT - VERMONT SDI State: VT - VERMONT State Marital Status: Single Exemptions: 1 State Tax Code: <input type="text"/>		Reciprocation Reciprocal Method: None Reciprocal State: Please Choose (represents BLANK)	
Settings Salary Type: N/A Calculate SUI Taxable 1099 Wages: No		Overrides and Exemptions State Tax Type: None Employee Tax Statuses: State Tax: Include - Withhold tax SDI Exempt: Include - Withhold tax SUI Exempt: Include - Withhold tax Employer Tax Statuses: SDI Exempt: Include - Withhold tax SUI Exempt: Include - Withhold tax	

And here is the screen the user receives when adding a new State Taxes record:

Tax Info: New State Tax: Red S Shirt - 28

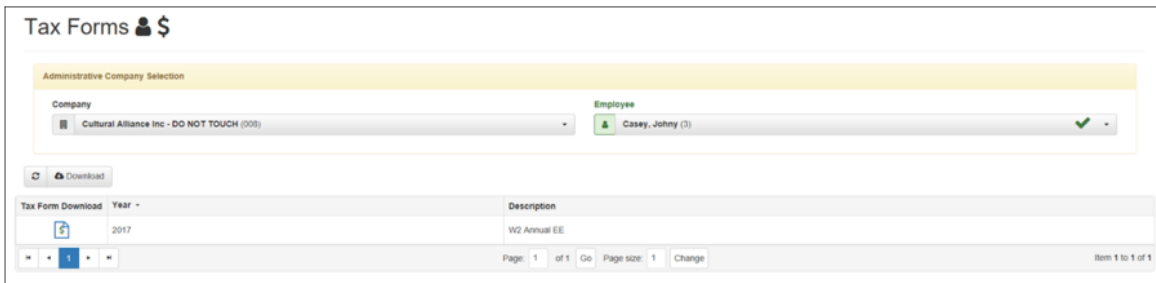
Details Earnings State: Please Choose (represents BLANK) County: <input type="text"/> SUI State: Please Choose (represents BLANK) SDI State: Please Choose (represents BLANK) State Marital Status: Please Choose (represents BLANK) * Exemptions: OverrideAmount State Tax Code: <input type="text"/>		Reciprocation Reciprocal Method: None Reciprocal State: Please Choose (represents BLANK)	
Settings Salary Type: Salary For Varying Hours Calculate SUI Taxable 1099 Wages: No		Overrides and Exemptions State Tax Type: None Employee Tax Statuses: State Tax: Include - Withhold tax SDI Exempt: Include - Withhold tax SUI Exempt: Include - Withhold tax Employer Tax Statuses: SDI Exempt: Include - Withhold tax SUI Exempt: Include - Withhold tax	

Tax Form



Admins (or higher roles) have access to an employees electronic tax forms by clicking the **Tax Form** menu item on the Employee Maintenance screen.

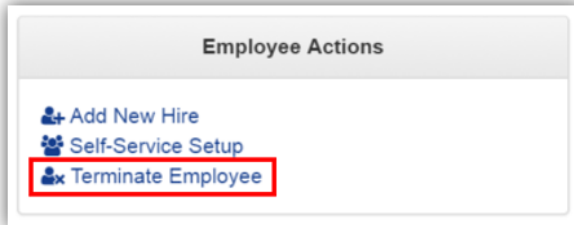
Tax forms include: EE W2 Electronic Copy, EE 1095B Electronic Copy, EE 1095C Electronic Copy, and 1099-Misc.



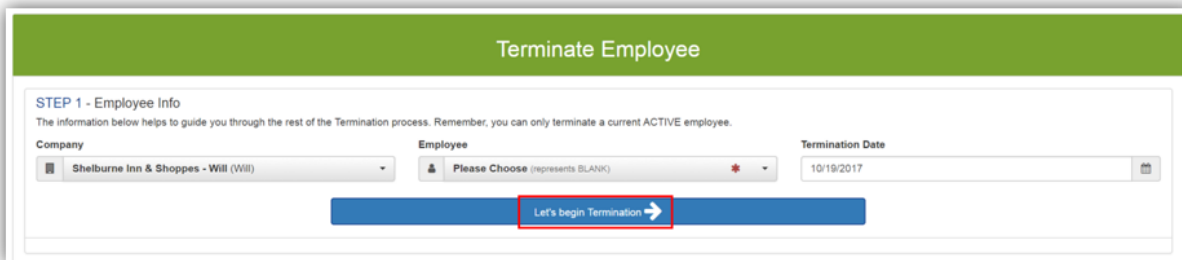
Terminating an Employee

Terminating an employee can be performed, as long as you have access. The only users, besides Super Admins and SB Admins that have the permissions to terminate an employee are Base Admin users.

To terminate an employee, go to **HR Admin - Employee Actions - Terminate Employee.**

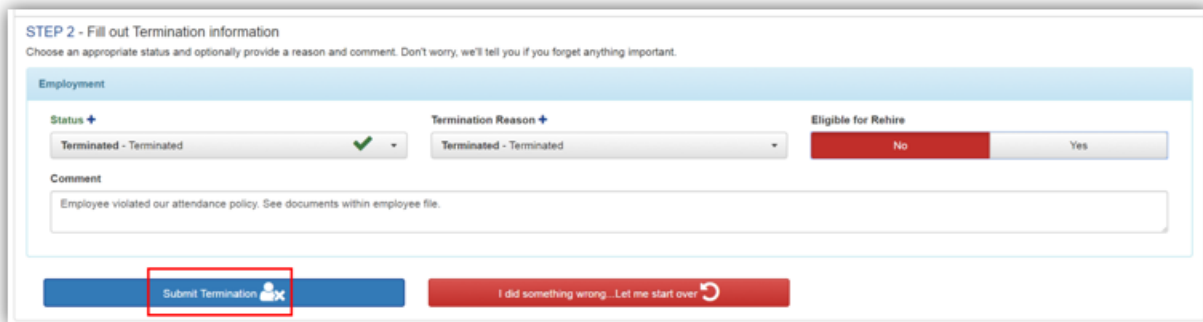


The two-step **Terminate Employee** wizard will walk you through the process.



Select the **Company**, the **Employee** and click the blue **Let's begin termination** button.

The **Termination Date** will always default to the current date. It can be back dated, but not post dated.



Step 2 allows the user to set:

- Status
- Termination Reason
- Eligible for Rehire

Click the blue **Submit Termination** button when complete

Note: After Terminating the employee, remember to adjust their **User Security Role** accordingly. Go to **HR Admin – Company - User List**. Click on the user. If, for example, they were a Base Manager, that level should be removed so they only have access as a Base User. If you choose, you can also **delete** or make them **inactive** as a user.

Re-Hiring an Employee

To Rehire an employee, make sure you are first locked into that company and employee using the Company and the Employee search boxes in the upper-right section of the **Dashboard**:



If the employee is Eligible for Rehire, go to the **HR Admin - Employee Maintenance - Employment Detail**. Since you are locked in, the employee's name will appear in the **Employee** dropdown:

 A screenshot of the 'Employment Detail' form. The form has two main sections: 'New Hire/Termination' on the left and 'ADD Position/Organization' on the right. The 'ADD Position/Organization' section contains fields for 'Company' (WR Shelburne Inn & Shoppes (Will)), 'Employee' (Longbottom, Jasper (144)), and 'Effective Date' (02/21/2018). There is a toggle switch for 'Is this a RE-HIRE?' with 'Yes' selected. A blue button labeled 'Let's begin adding a Position/Organization' is at the bottom. A callout box on the left contains the following text:

Make sure the green **Is this a Rehire** toggle is set to **Yes**.

Click the blue **Let's begin adding a Position/Organization** button.

Set the **Is this a Re-Hire?** toggle switch to **Yes**.

Position/Status

Position
TS - Training Specialist

Employment Type
NA - N/A

Status
Active - Active

When the employee's **Employment Detail** screen opens, scroll down to the **Position/Status** tile. Select **Active** from the Status dropdown.

Click the green **Save Changes** button when complete.

The employee is now **Active**. You can verify this by viewing the employee's status in Evolution Classic. Go to **Employee – Employee - EE Entry** tab:

Employee

SSN * 855-55-4558 EE Code * 144

Last Name * Longbottom

First Name * Jasper MI

Address 1 * 1 Exploding Poplart

Address 2 *

City * Thebes State * VT Zip * 05248

Primary Phone * ext * Gender * Male

Date of Birth * 5/20/1988 County * N/A

Ethnicity * Black or African Americ Tribe *

Hire Status

Current Hire Date * 2/21/2018 Original Hire Date * 5/9/2017

Current Term Date * 2/20/2018 Eligible for Rehire * Yes

Current Status Code * Active

Position Status * N/A

Pay

Pay Frequency * Bi-Weekly Standard Hours

Salary Amount * Average Hours 0.00

Rate Number * 1 Rate Amount * 20.00

Position for Pay Grade * Pay Grade

Position

Healthcare Coverage * No ER Paid Ins/Not Eligibl

Dependent Coverage Available * Eligible for Benefits

Labor Defaults

Assign D./B./D./T

Division * Retail Shelburne Inn Store

Branch * Cheese Cheese Shoppe

Department * Taster Cheese Taster

Team *

Default W/C *

Default Job *

Union *

Taxation Details

Federal Marital Status * Single Married

Federal Dependents * 0

State * VT

SDI * VT

SUI * VT

State Marital Status * State Dep

Work At Home * Yes No

Reciprocal Method * Take None

Reciprocal State *