Employee Maintenance Guide

Advanced HR 2.0

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Document Revision History

Doc Version	Software Version	Publish Date	Description
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

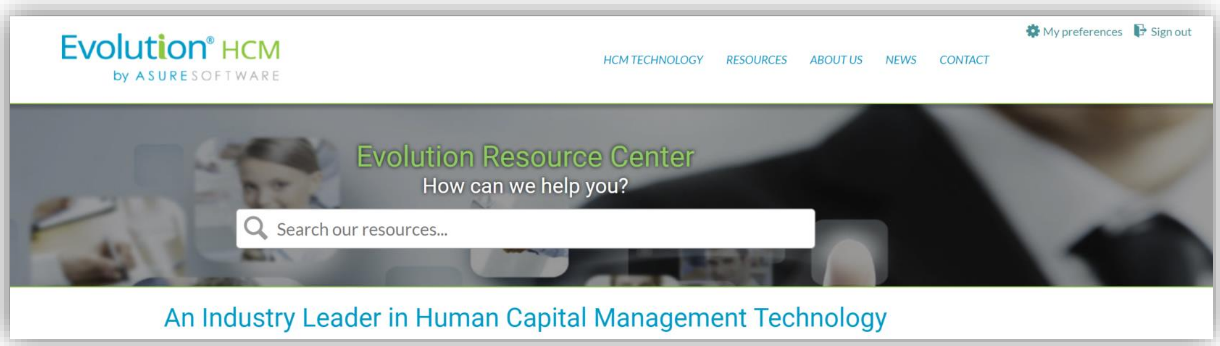
Employee end users should refer to the separate document *Getting Started: Employee End User Guide* which describes Advanced HR 2.0 from the employee user point of view.

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

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:

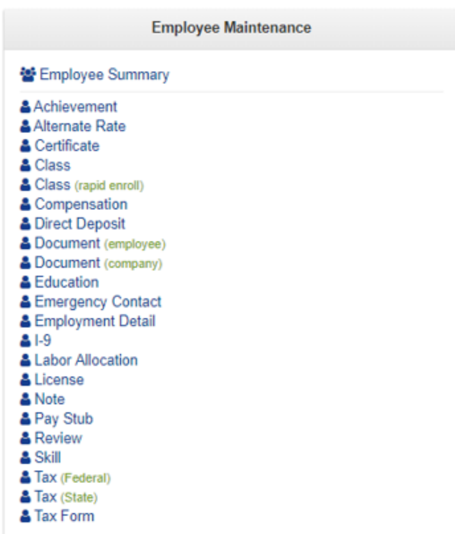
AHR_implementations@asuresoftware.com

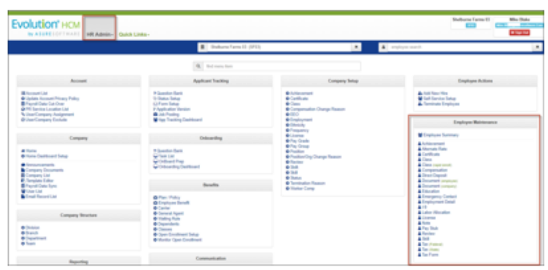
Advanced HR 2.0 Employee Maintenance Guide

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:** xxx-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:** xxx-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:** xxx-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.

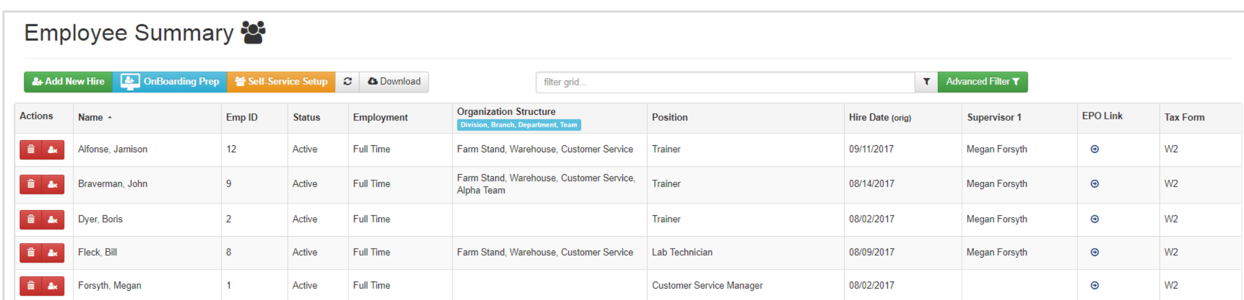
Note: The AHR 2.0 Onboarding Validation Report (S3550) is a Company Level Report that must be pulled from the **SB Reports** and then added to each company that will be cutover. In Evolution Classic, go to **Bureau - Company Default Reports**.

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**:



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**.

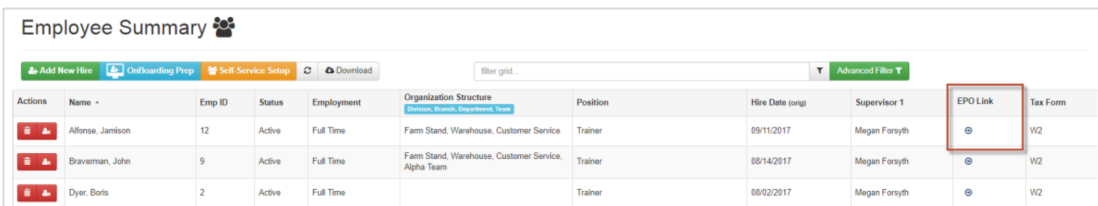
The **Employee Summary** dashboard displays the following information for employees in column fields:

- Employee Name
- Employee ID (Employee number)

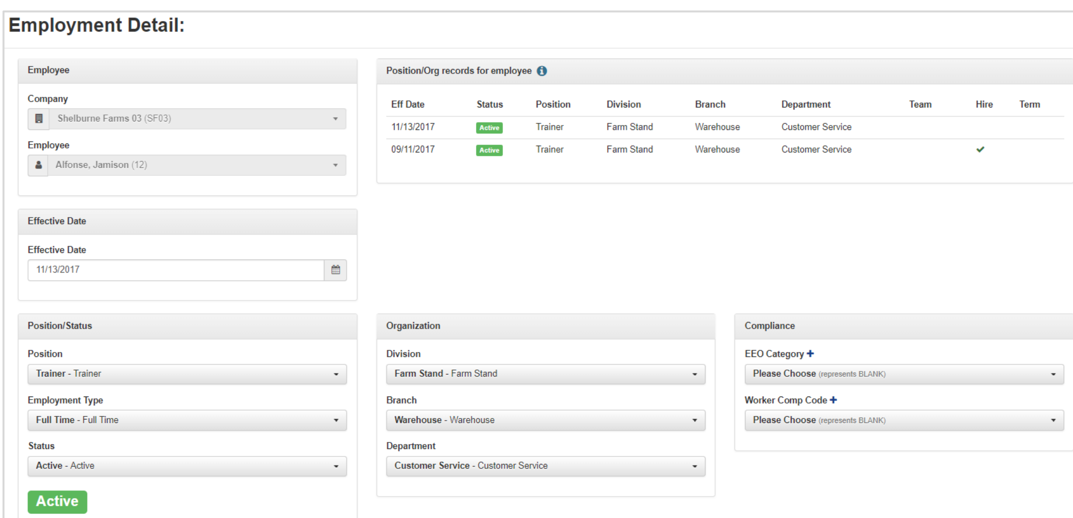
- Status
- Employment Type
- Organization Structure (DBDT)
- Position
- Hire Date
- Supervisor 1
- Tax Form

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**.



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.

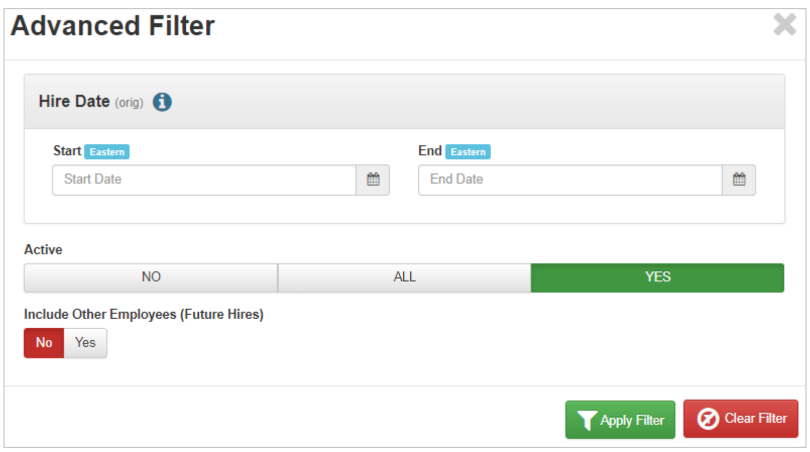


See the **Employee Detail** screen section of this document for more information about this screen.

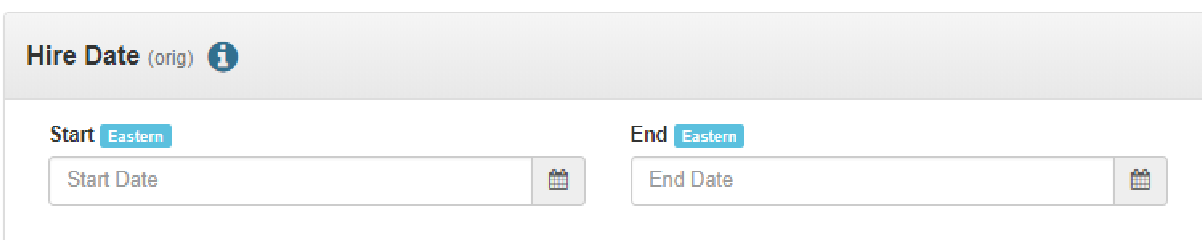
Using the Employee Summary Advanced Filter Screen

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.

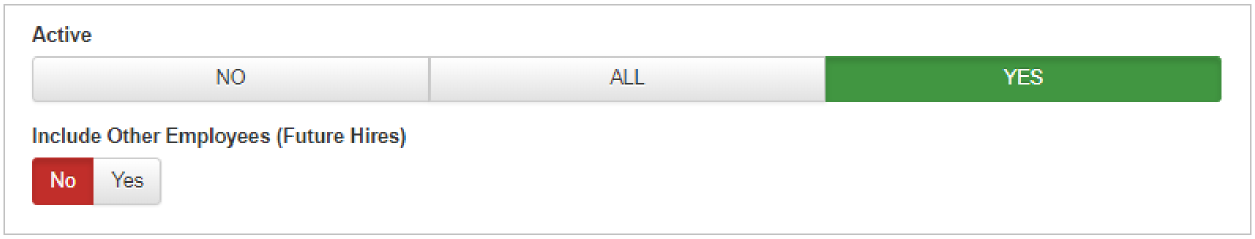


Use the **Hire Date** section to narrow the list of employees displayed by their date of hire as follows:



- 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:



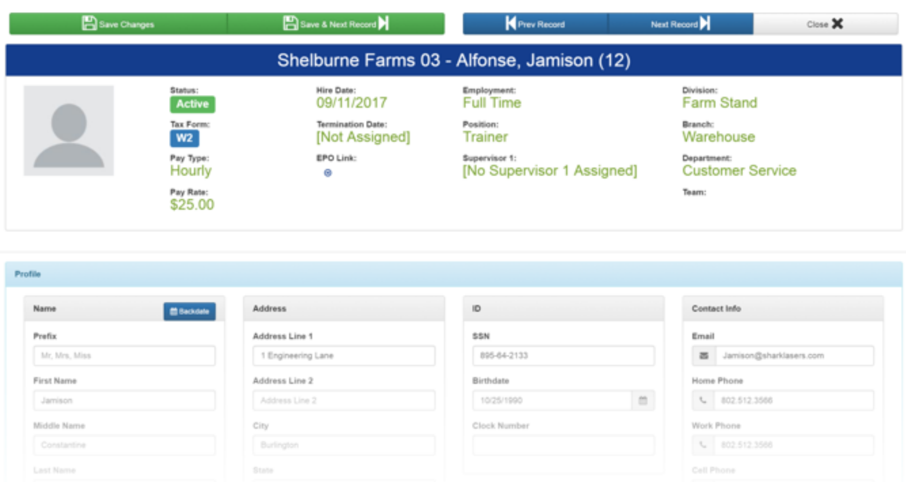
- The **Active** toggle setting will default to **Yes** to display all employees with a **Status** of **Active**.
- Set the **Active** toggle to **All** to display employees with all Statuses.
- Set the **Active** toggle to **No** to not display employees with a **Status** of **Active**.
- You can include 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

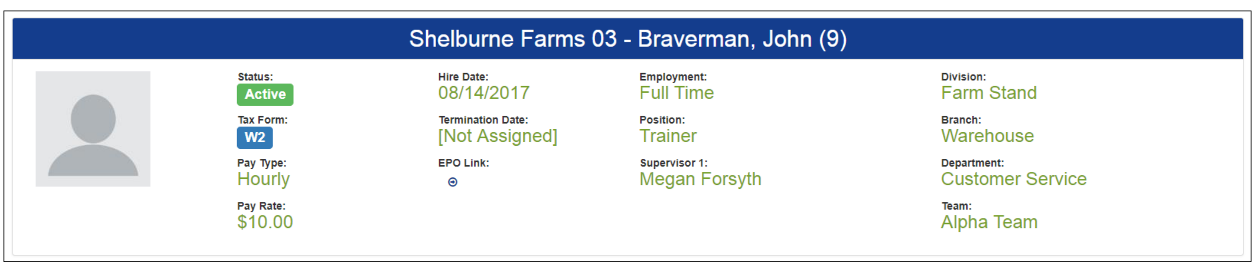
Section	Description
Summary	Gives a read only breakdown of the employee's information.
Profile	Displays Name, Address, SSN, etc.
Classification	Shows Gender, Ethnicity, Marital Status, etc.
Links	Displays the **Linked User(s)**. Shows what **Security Role(s)** the employee has assigned to them. Also 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 by 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.

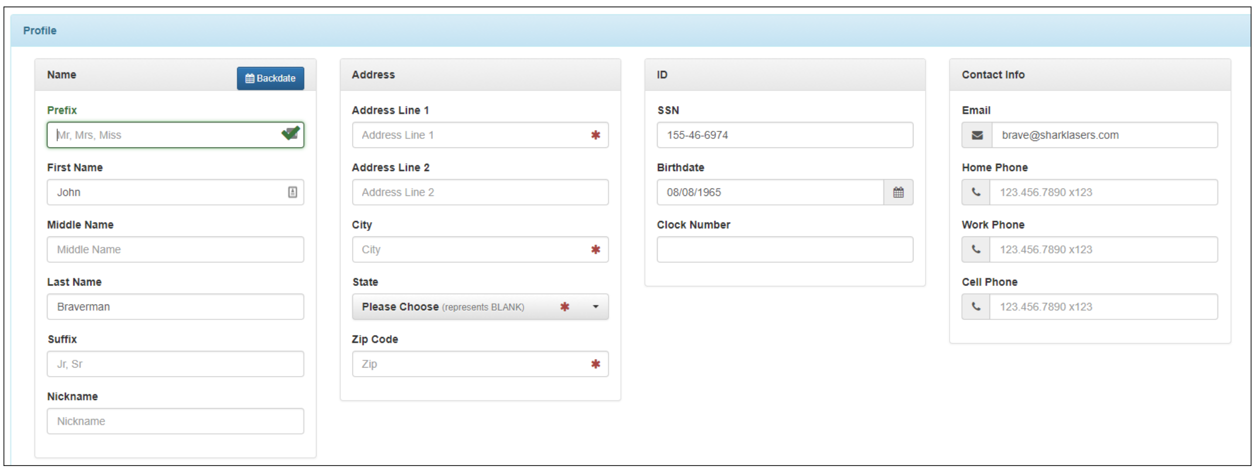


When an employee is selected, their information is displayed in sections on the **Employee Summary**. Scroll down to find:

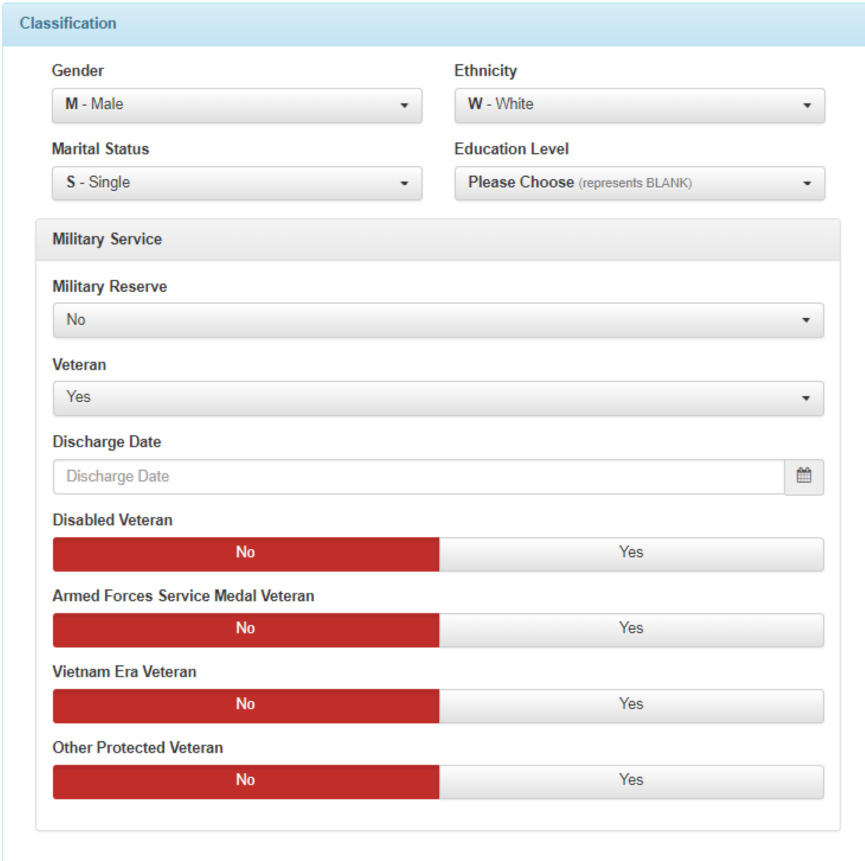
Section	Description
Summary	Gives a read only breakdown of the employee's information.
Profile	Displays Name, Address, SSN, etc.

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.

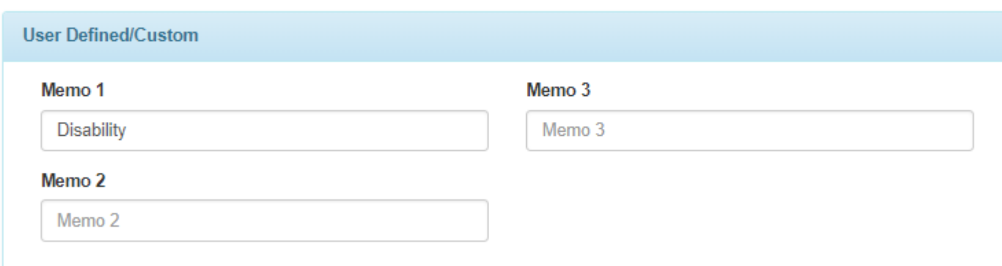
In the **Profile** section, we can see the employee's basic information. The Clock Number would be the SwipeClock number.



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

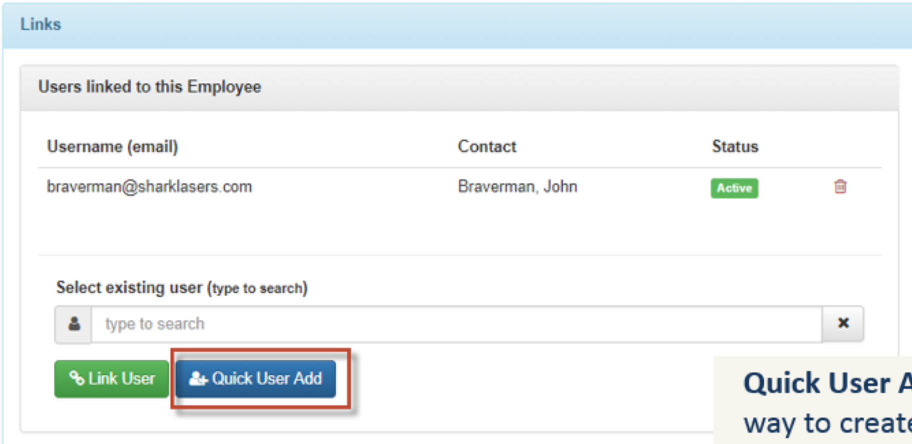


User Defined / Custom allows for editable memo codes to record any applicable information.



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.



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.

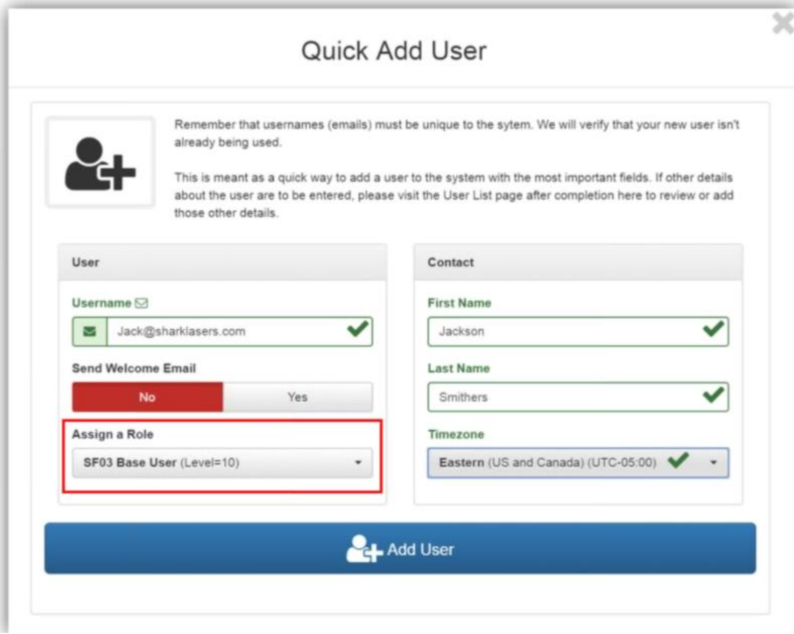
Roles for all Users

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

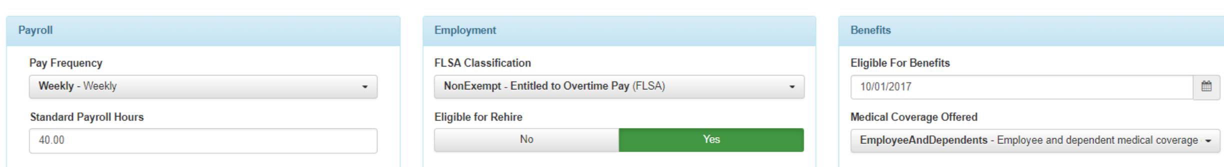


Note: Remember that **usernames** (emails) must be unique to the system. Advanced HR 2.0 will verify that the new username is not already being used. **Quick User Add** is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered,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

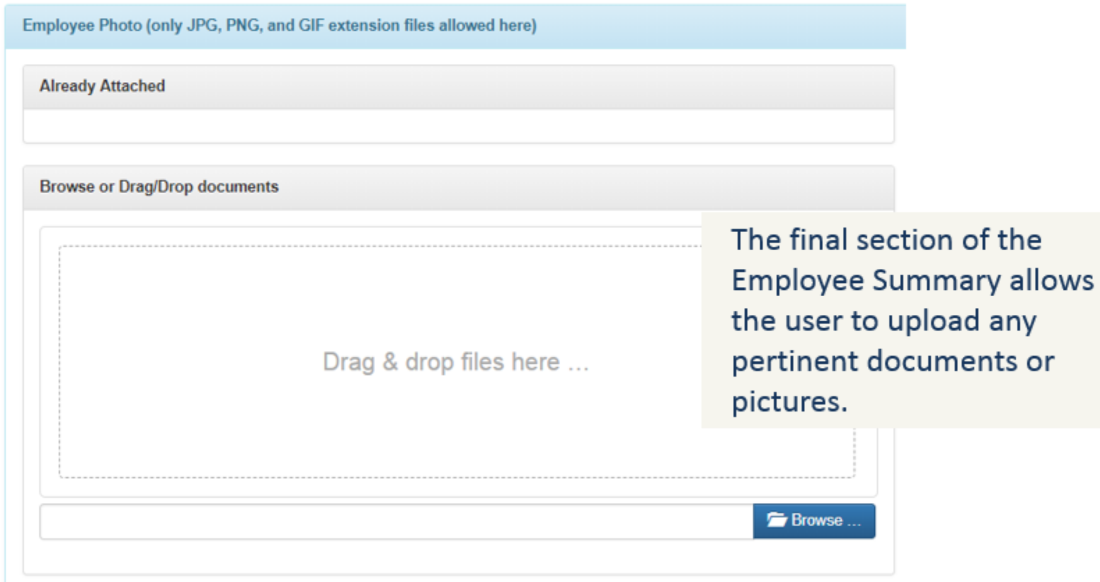
Payroll / Employment / Benefits sections

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.

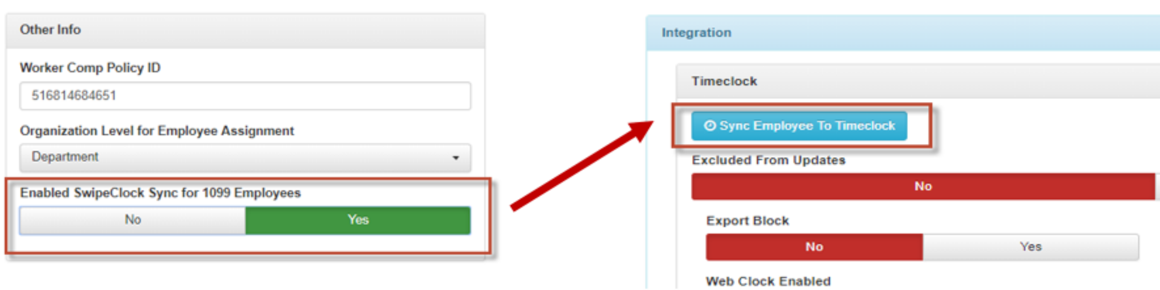


Employee Photo section



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**.

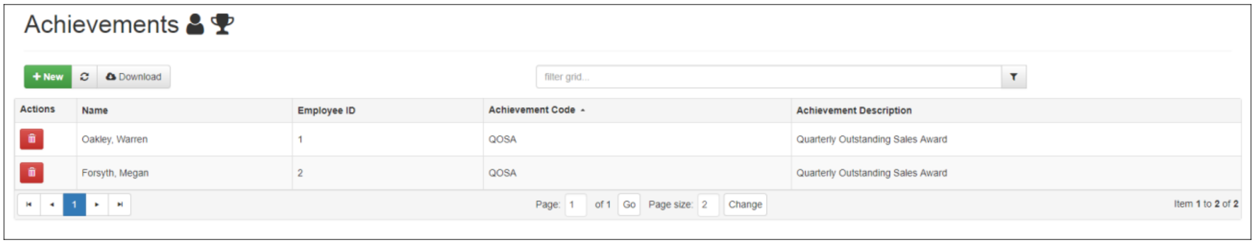


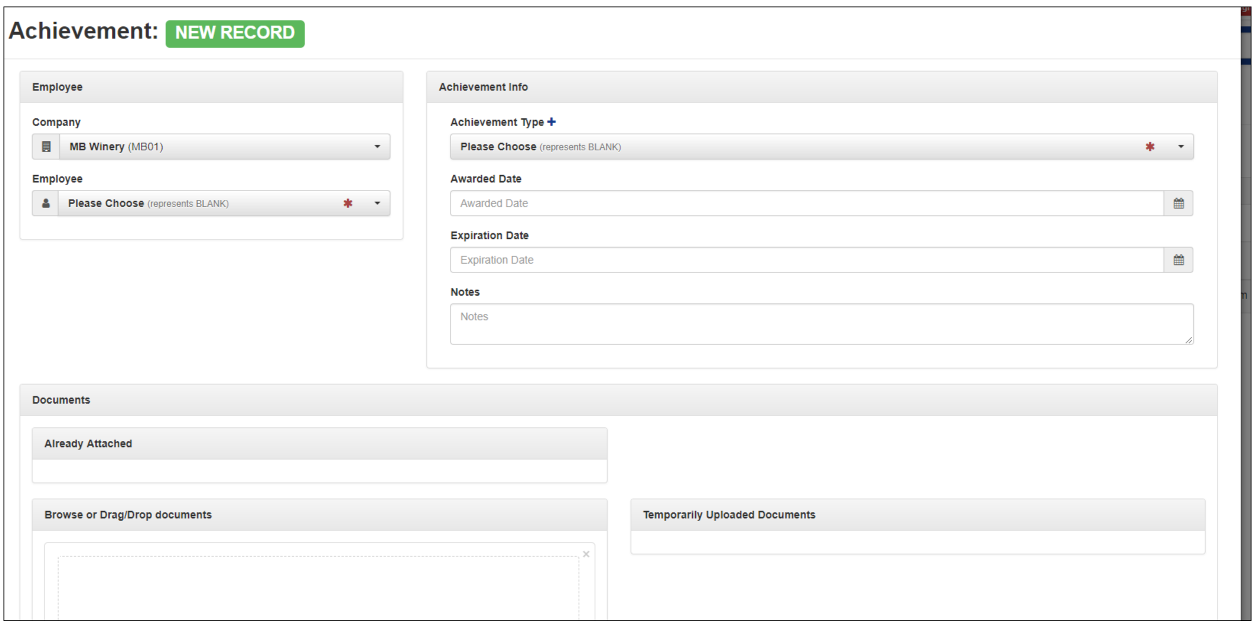
Previously, the button only appeared for regular (W-2) employees.

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.



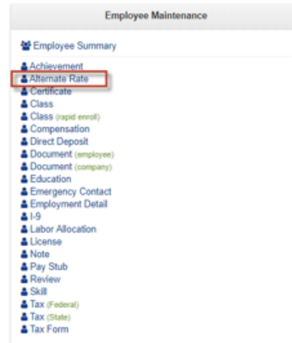


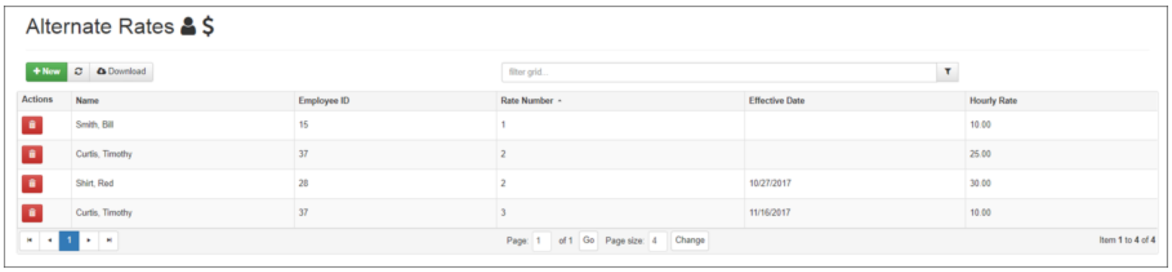
Alternate Rate

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.

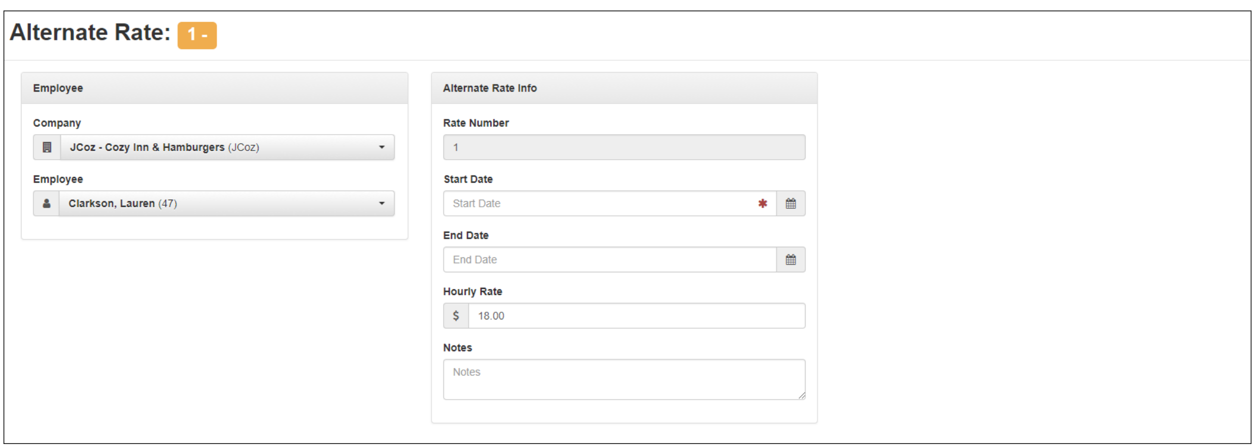
To view or edit an employee's alternate pay rates, click on **Alternate Rate.**

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



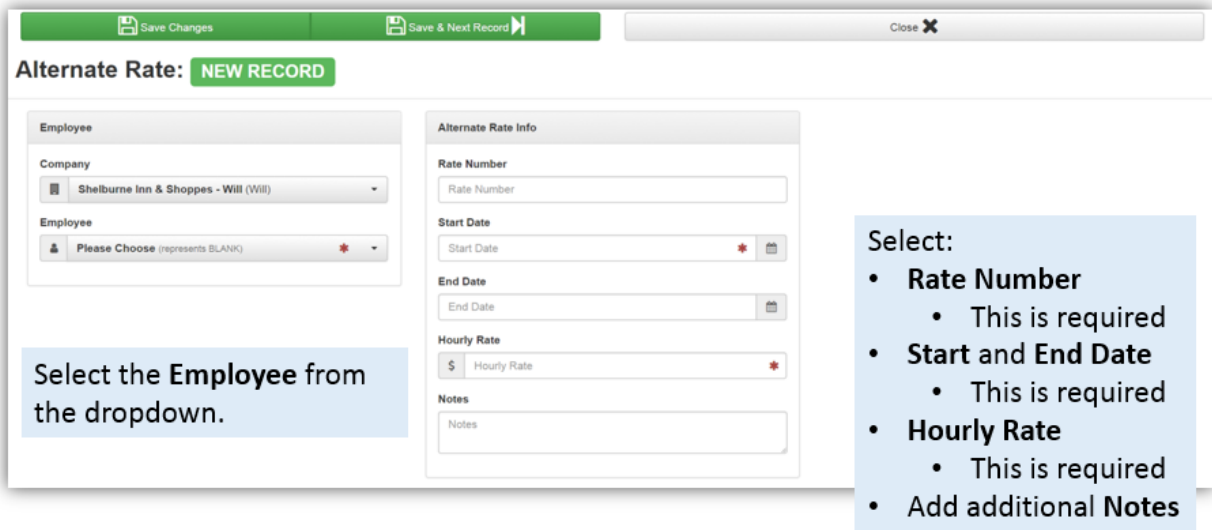


The **Alternate Rates** Dashboard displays any additional rates of pay the employees are receiving. This information flows over from Evolution Classic as part of the payroll cutover. You can also add other pay rates here and it will flow back into payroll and Evolution Classic. Click on an employee row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

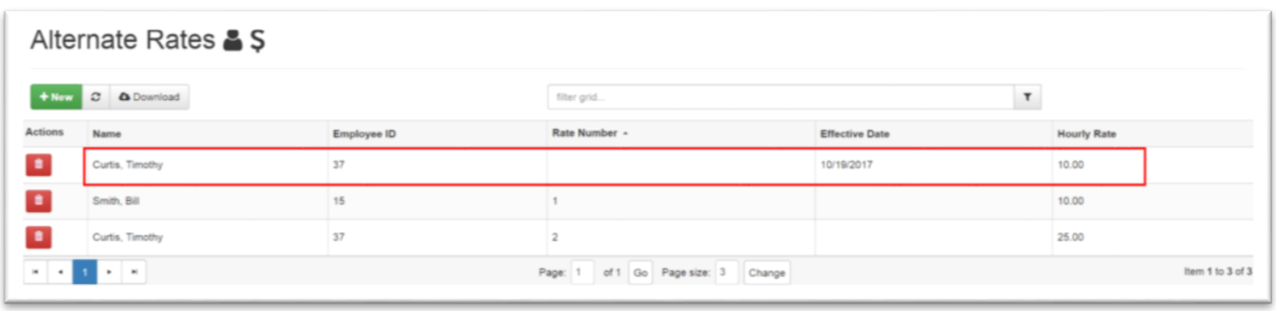


To enter a new alternate rate record, click on the **+ New** button. Remember, any required fields display with a red asterisk.

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



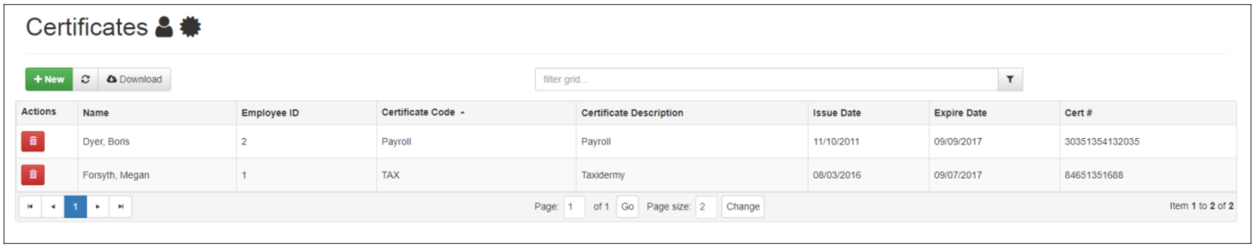
Any alternate rates you enter on this screen will by default not be set as the Primary Rate. The Rate Amount is 0.00 if nothing is entered.

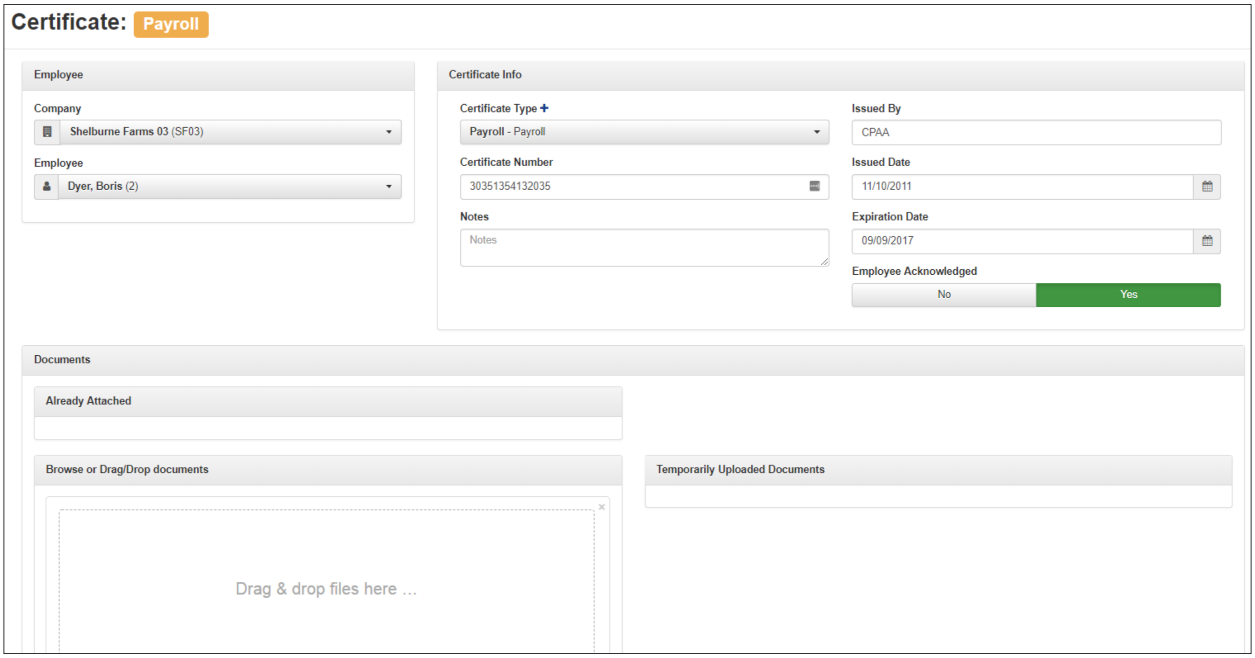


In the above screenshot, note the added Alternate Rate for Timothy Curtis.

Certificate

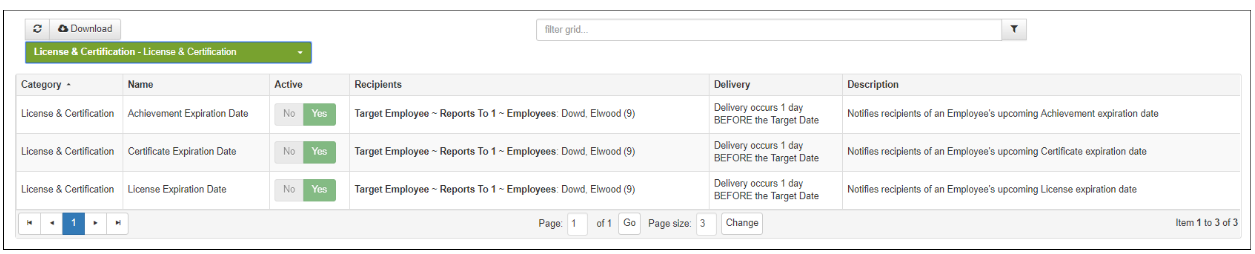
Provides a list of any certifications with the details displayed by clicking on a specific certification item row on the summary screen.





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.



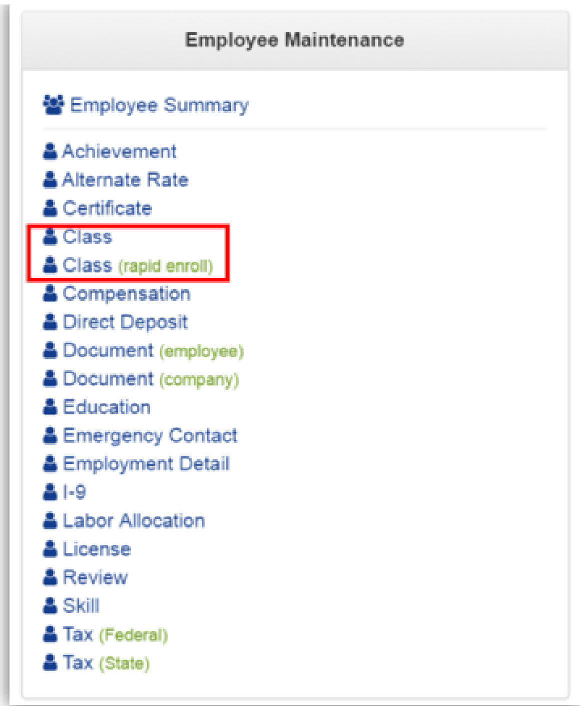
Date-Based Notifications are triggered by a date, such as for an expiring license. It's important to remember that Date-Based Notifications, unlike Event-based notifications, need to be set up and activated before they can be used. Refer to the *Advanced HR 2.0 Notifications Job Aid*.

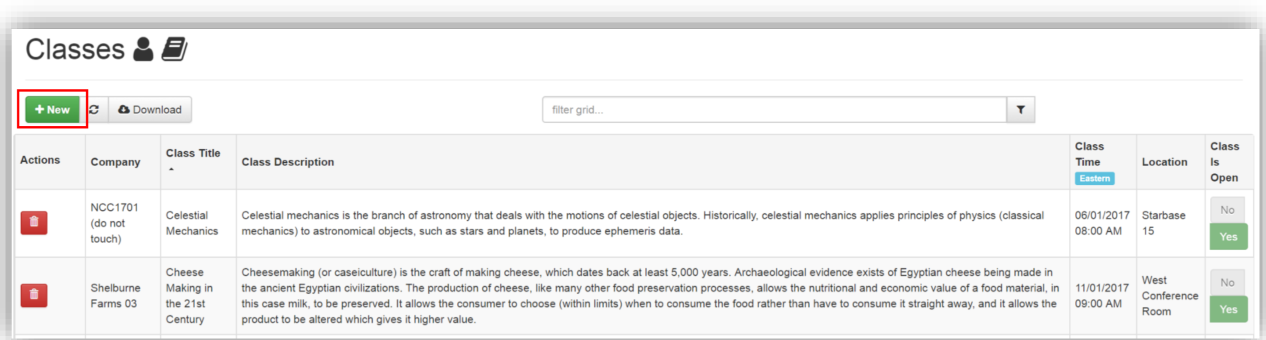
Class and Class (Rapid Enroll)

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.

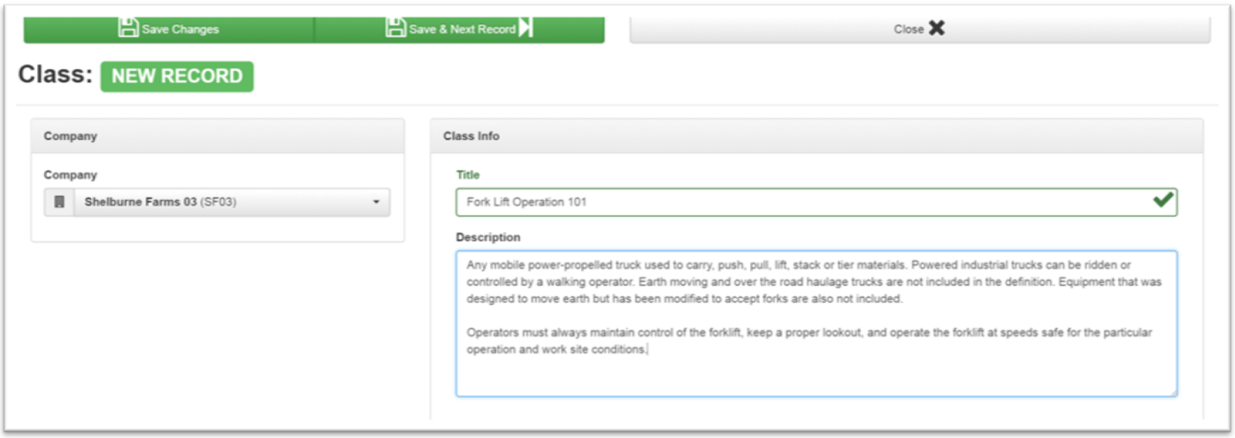
Let's create a Training Class by going to **HR Admin - Company Setup - Class**:





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.

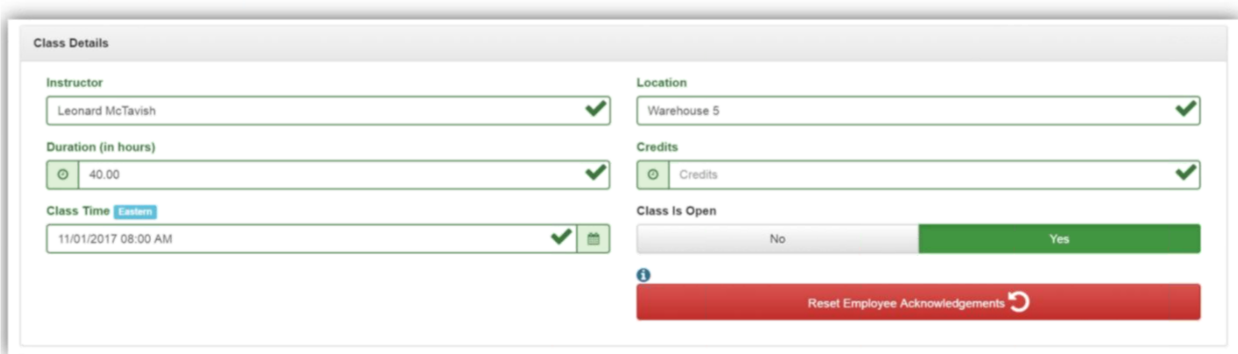
To create a new class, click the green **New** button.



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.

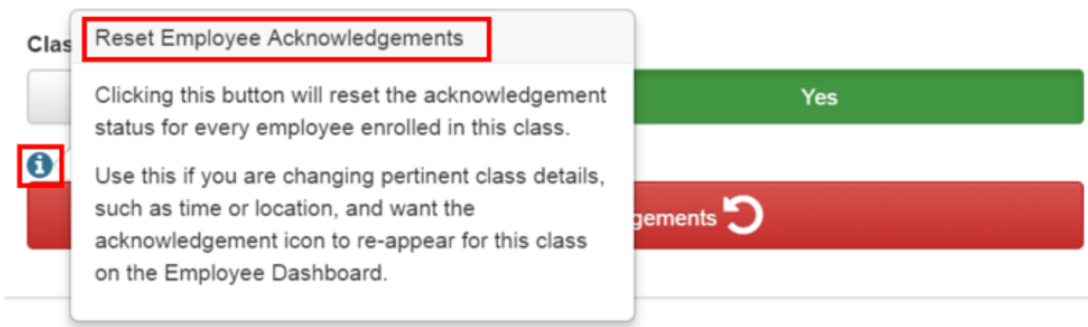
- If you haven't yet, select your **Company** from the dropdown.
- Give your class a **Title**.
- Give your class a **Description**.
- Enter any class details like start **Time** and **Location,** and maybe any **credits**.
- The **Class is Open** Yes/No toggle is where you make the class available for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

Enter the **Class Details**:



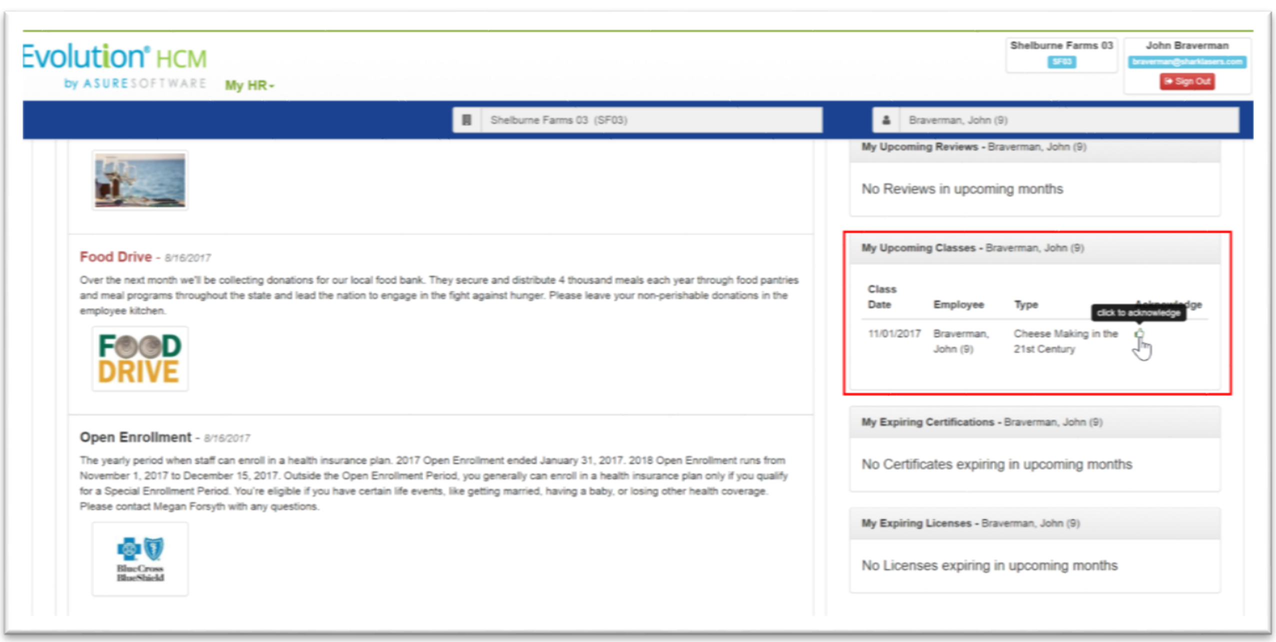
Note the blue 'i' information icon.

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.

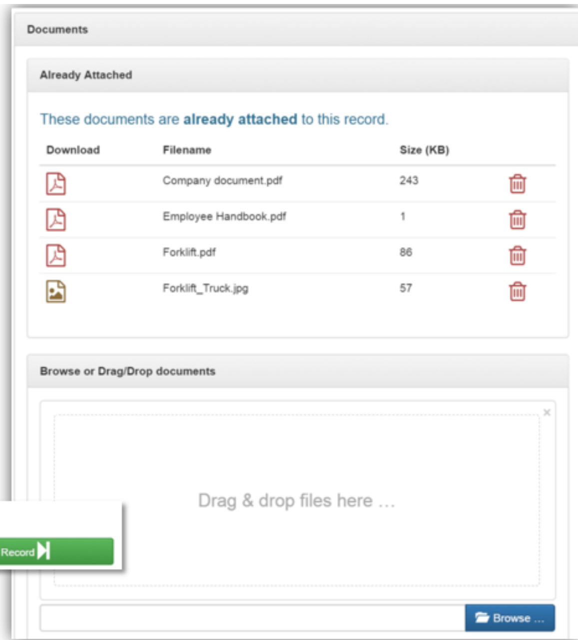
Classes can be **Acknowledged** by the employee on their Dashboard. Once a class is created, saved, and assigned to the employee, they can Acknowledge that they are going to attend the class. Below you can see a sample employee Dashboard with an acknowledgement icon showing in the **My Upcoming Training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

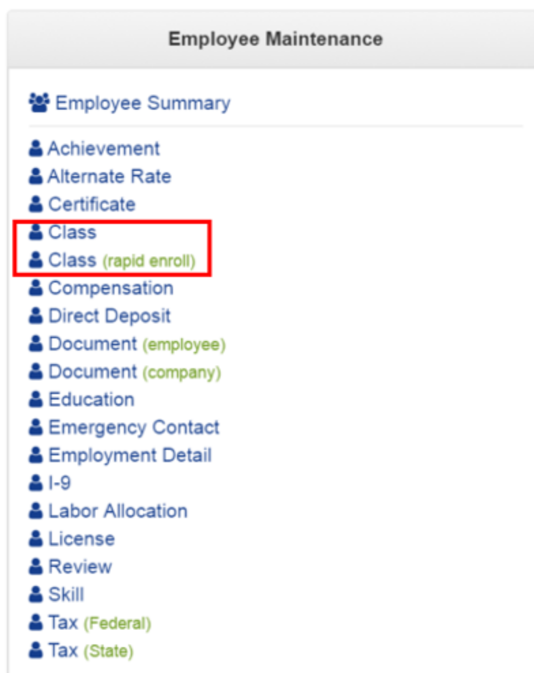
Assigning Training Classes to Employee(s)

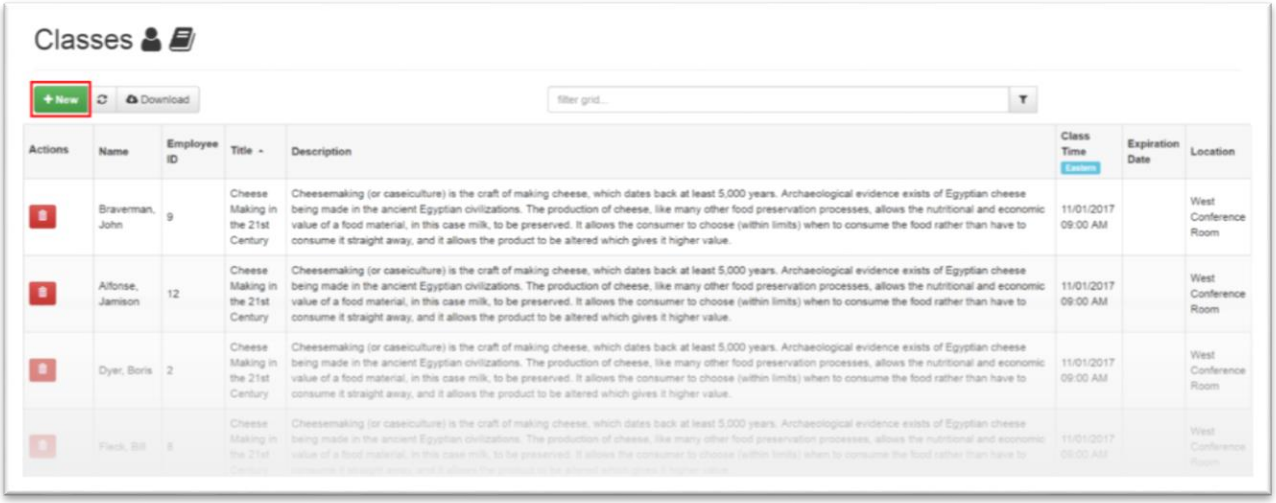
There are two ways to enroll employees in Training Classes:

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.

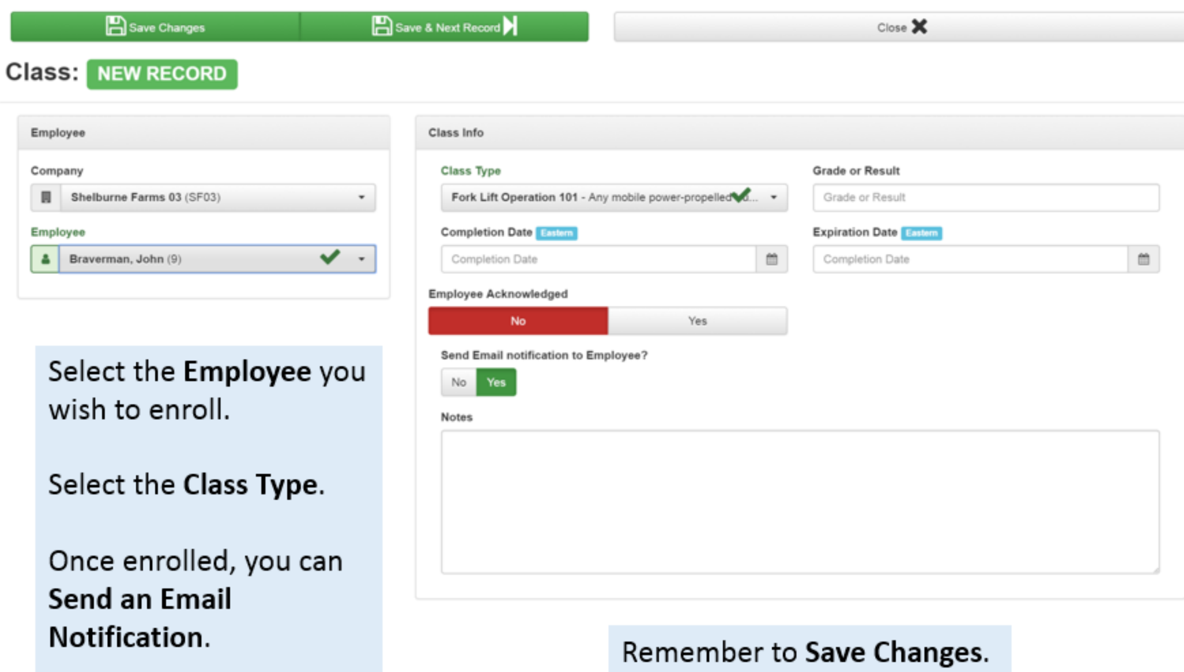
Note: Unless the **Class** is assigned to the employee(s), they won't be enrolled.





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.

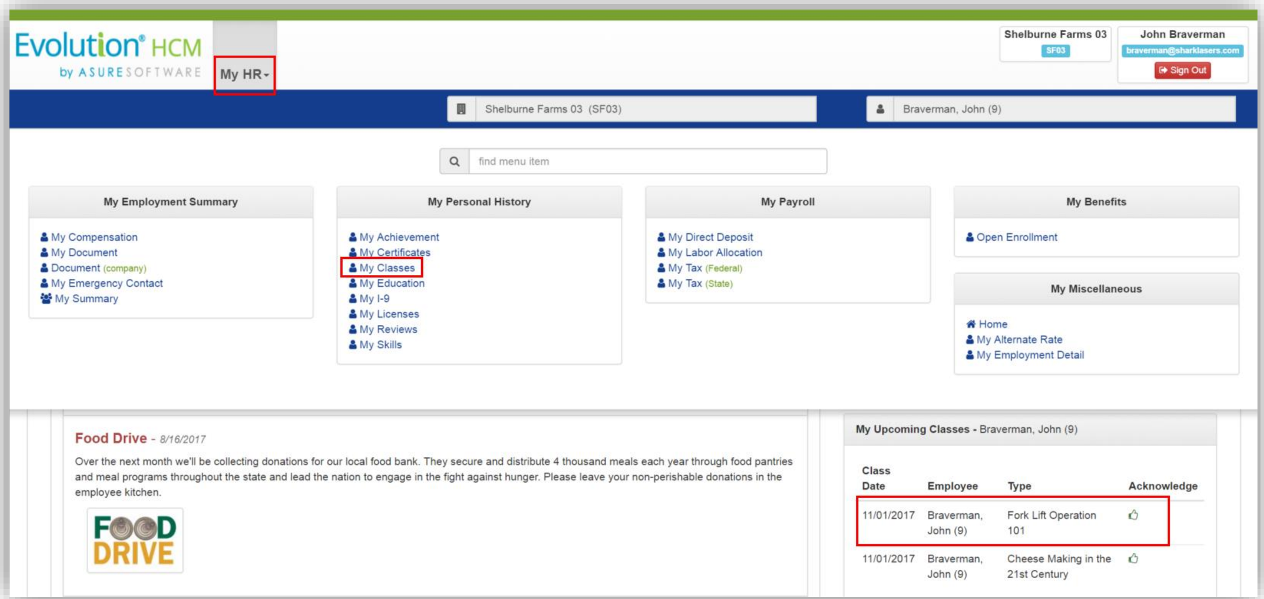
Enrolling One Employee in a Class:



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:

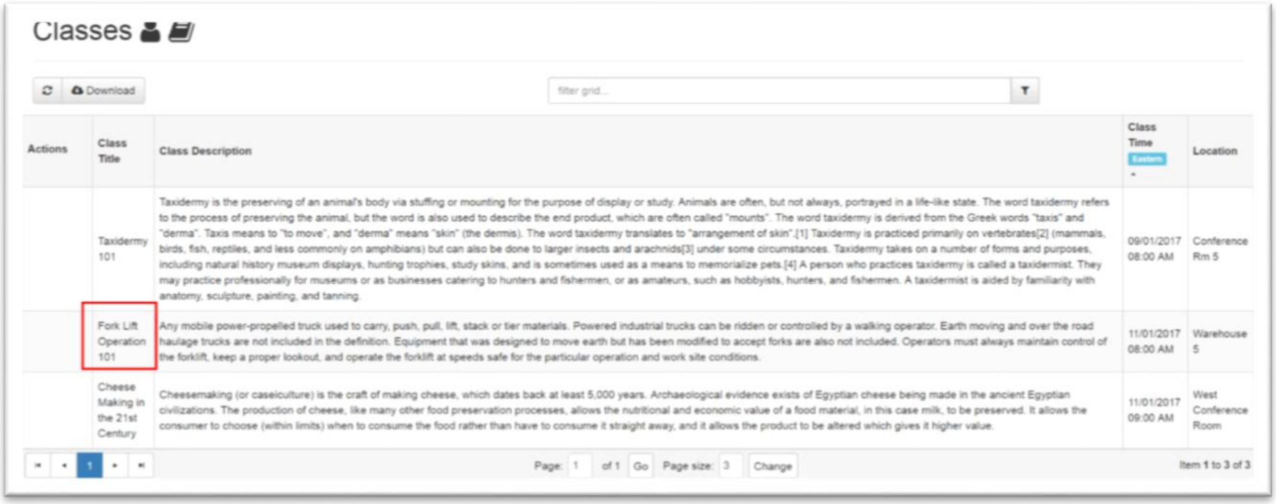


For the employee, the **My Upcoming Classes** tile will display all classes that have been assigned to the employee. They can **Acknowledge** the class by clicking the "thumbs up" icon.

Rapid Enroll Method - Enrolling Multiple Employees in a Class

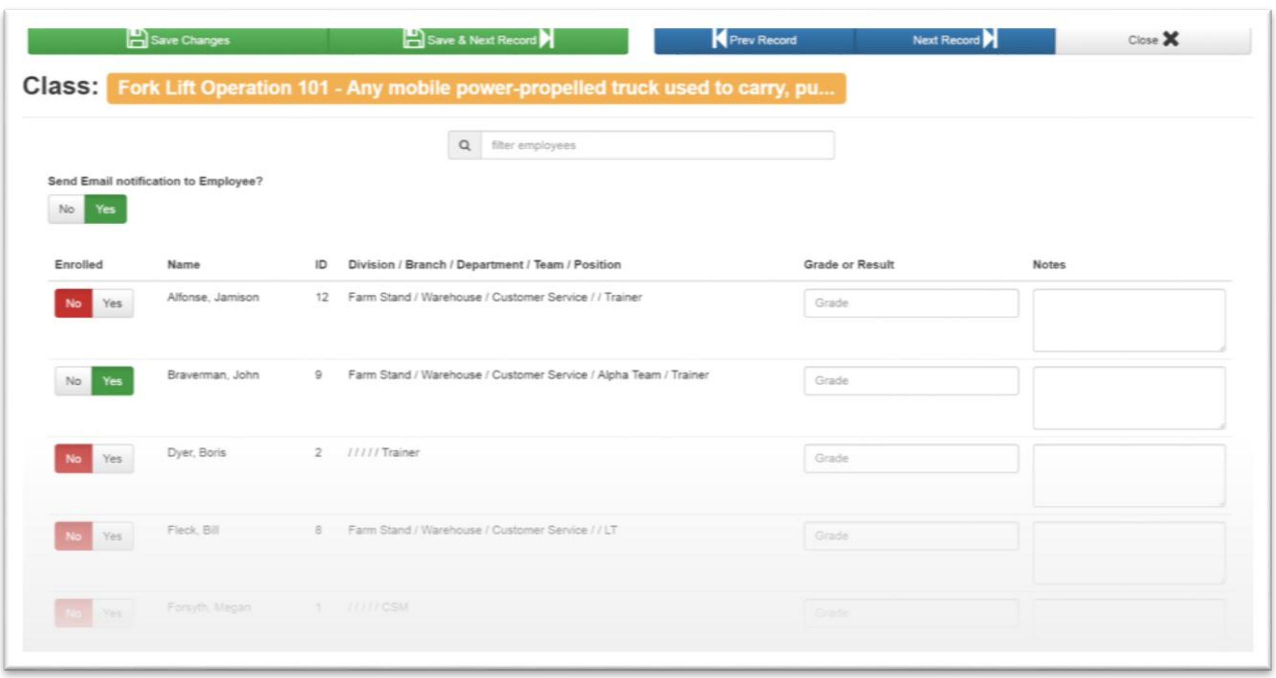
Rapid Enroll lets the user enroll multiple employees at once into a training class. It also allows you to assign grades or add notes to employees all at one time.

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



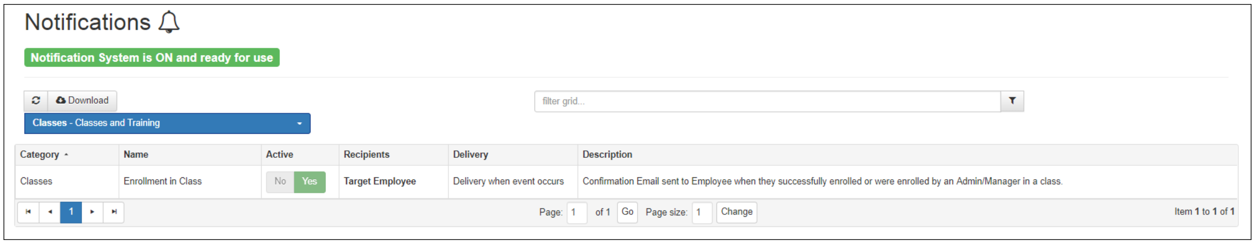
Go to the **Classes Rapid Enroll Dashboard** – this may be an easier and quicker method. In the above screenshot, we can see our **Fork Lift Operation 101** class. Click on it to open it.

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.



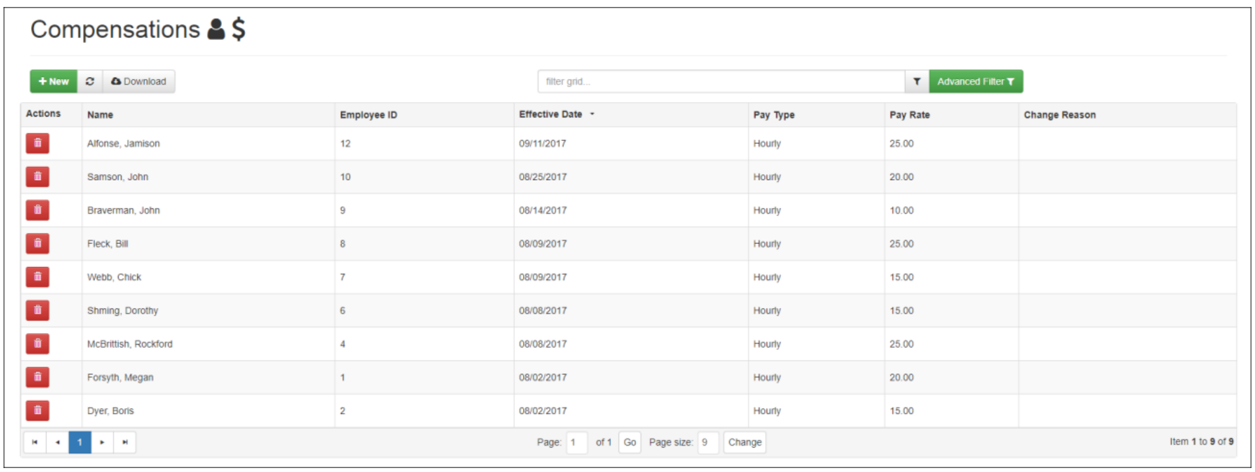
Notification Related to Employee Enrollment in Training Classes

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.

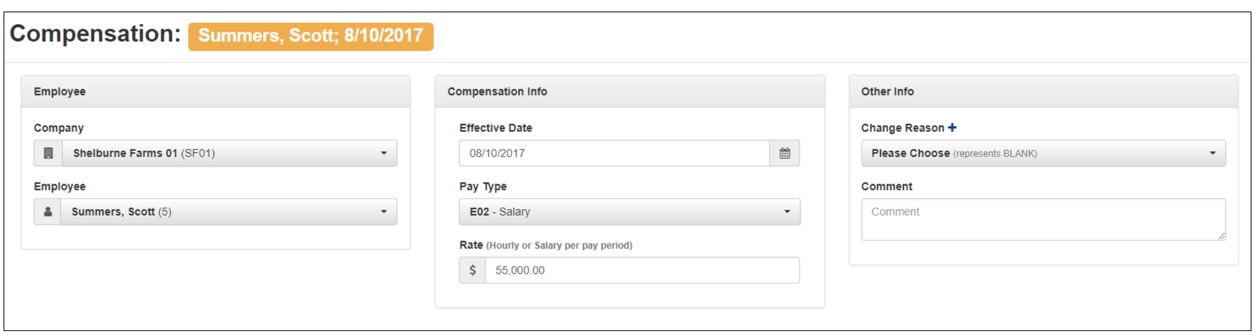


Compensation

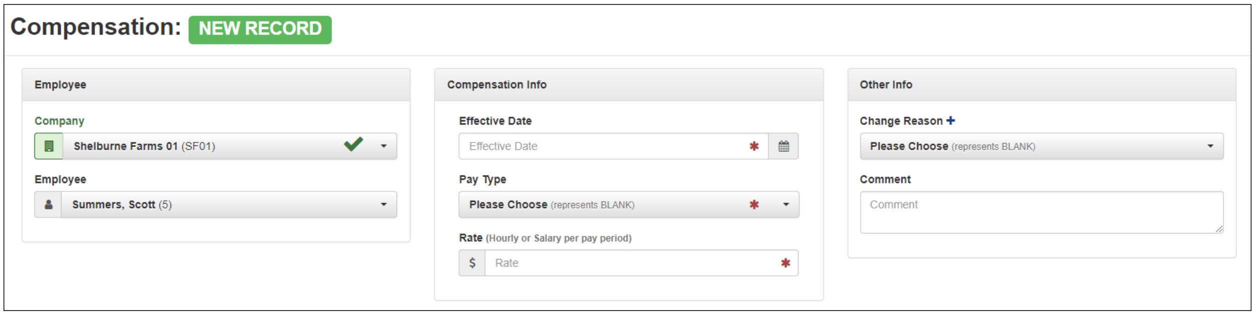
The Compensation screen displays the employee's primary rate or salary amount. You can view all of the employee's current and historical compensation changes.



Click on an employee to see the Compensation details screen.



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



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 an 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.

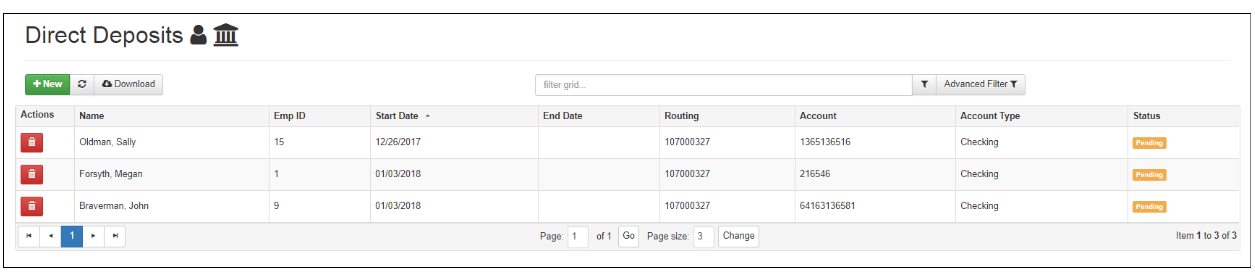
Direct Deposit

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.

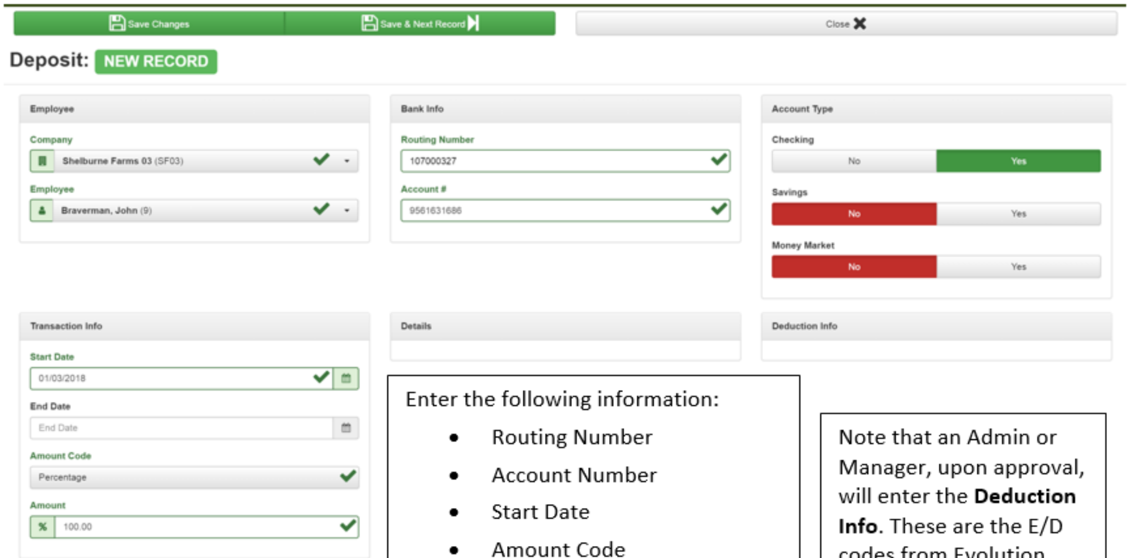
Note: Base Admins can enter, view, and approve Direct Deposits for any employee in the company. **Base Managers** can only enter, view, and approve Direct Deposit information for the employees that they supervise.

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



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



Enter the following information:

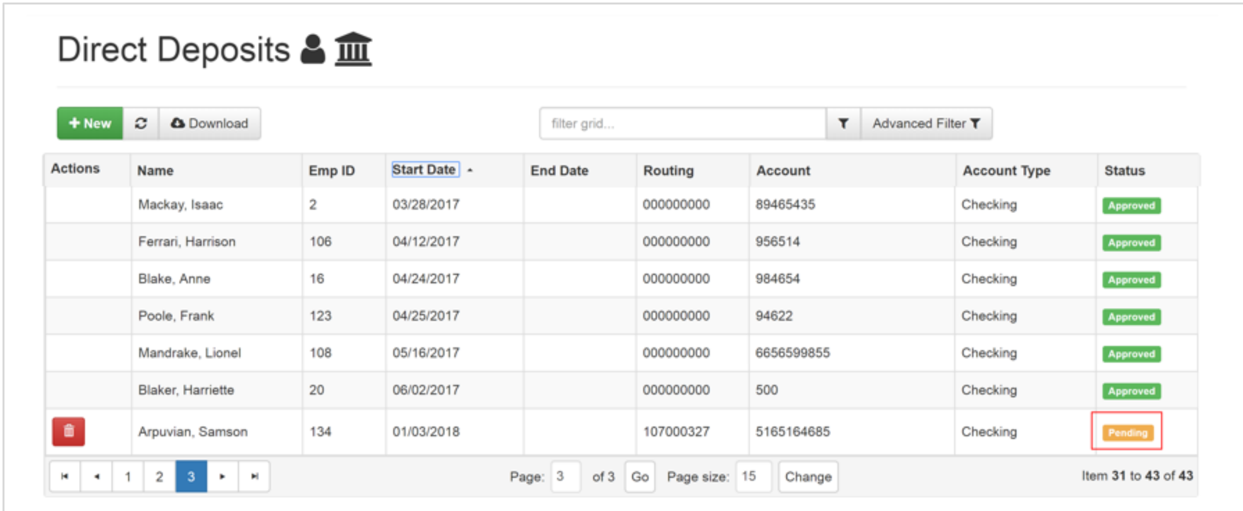
- Routing Number
- Account Number
- Start Date
- Amount Code
    - Percentage
    - Balance/Remainder
    - Flat Amount
    - Live Check Amount
- Amount of Deposit

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.

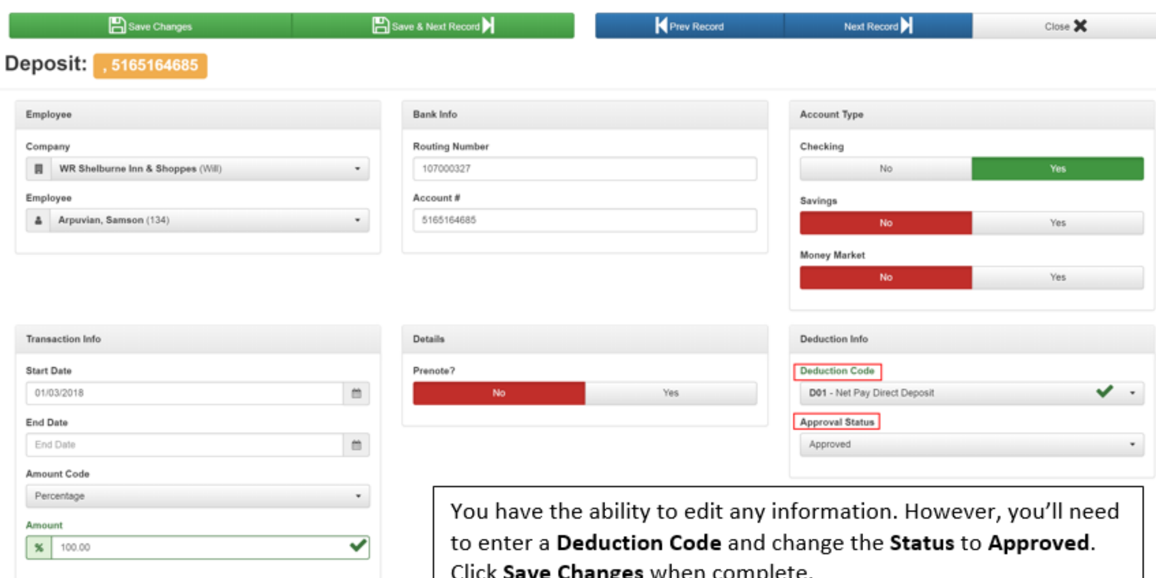
Note: Currently, the only **Account Types** that are set up for Direct Deposits are **Checking**, **Savings**, and **Money Market**. The system will allow for multiple entries in each category. Remember, if there are multiple checking accounts, for example, you'll need the corresponding E/D codes for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



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

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:



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.

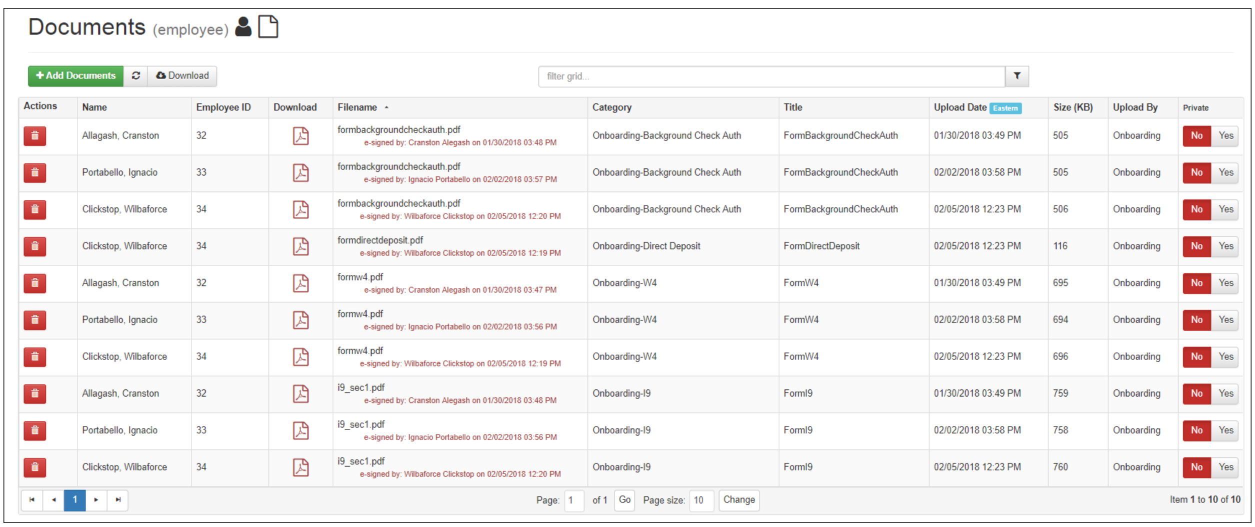
Direct Deposit Notifications

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.

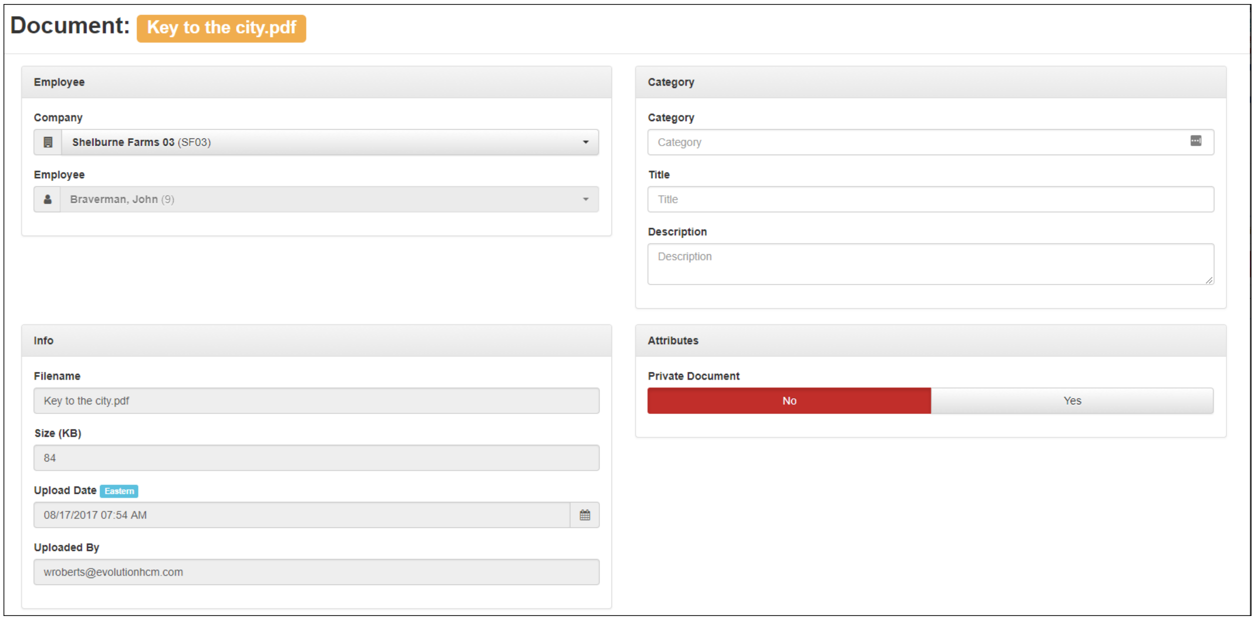
Document (Employee)

You can view, print, save, and add documents to the employee's "electronic personnel folder."


Documents (employee)
+ Add Documents | Download | filter grid...

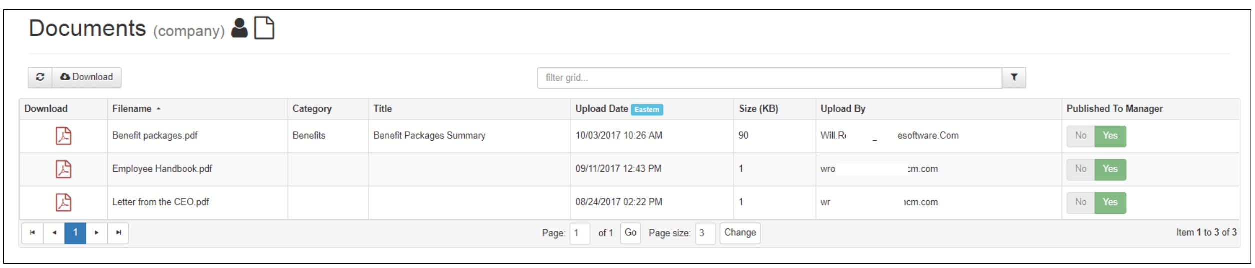
Actions	Name	Employee ID	Download	Filename	Category	Title	Upload Date Eastern	Size (KB)	Upload By	Private
	Allagash, Cranston	32		formbackgroundcheckauth.pdf e-signed by: Cranston Alegash on 01/30/2018 03:48 PM	Onboarding-Background Check Auth	FormBackgroundCheckAuth	01/30/2018 03:49 PM	505	Onboarding	No 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	No 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	No 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	No 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	No 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	No 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	No 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	No 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	No 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	No Yes

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



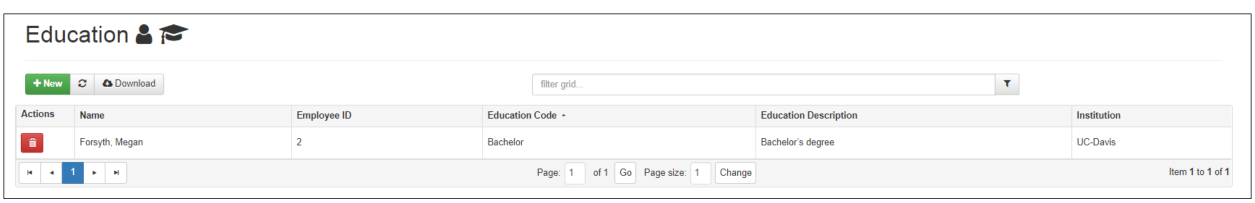
Document (Company)

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.

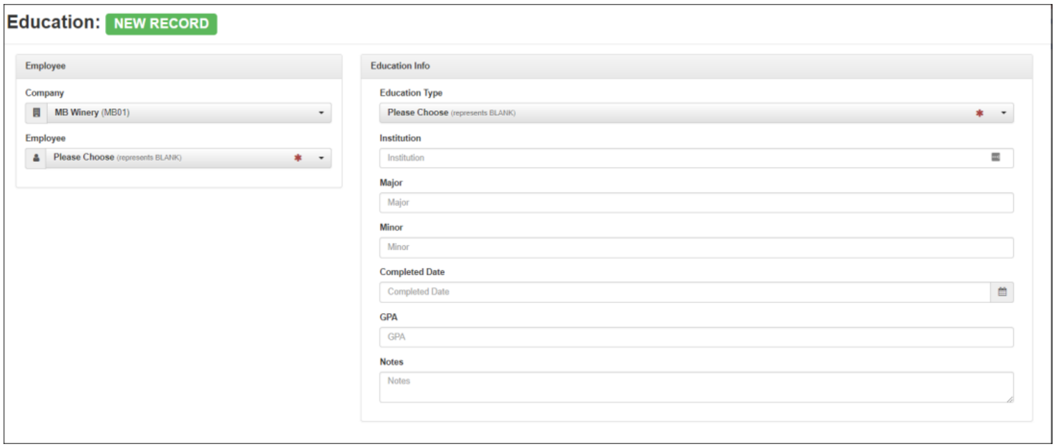


Education

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

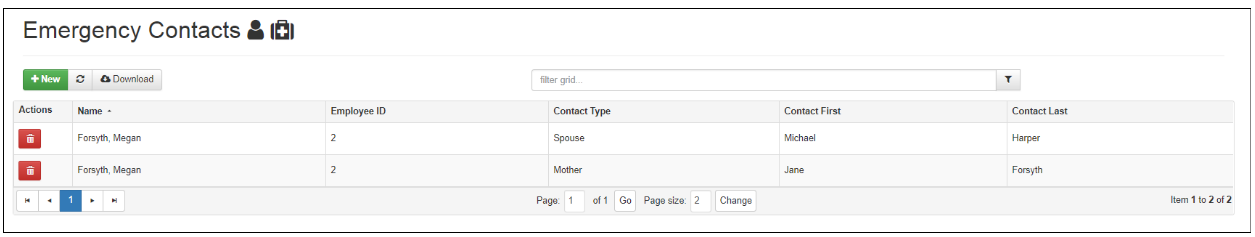


To add a new education record for the employee, click the green **+ New** button and complete the details.

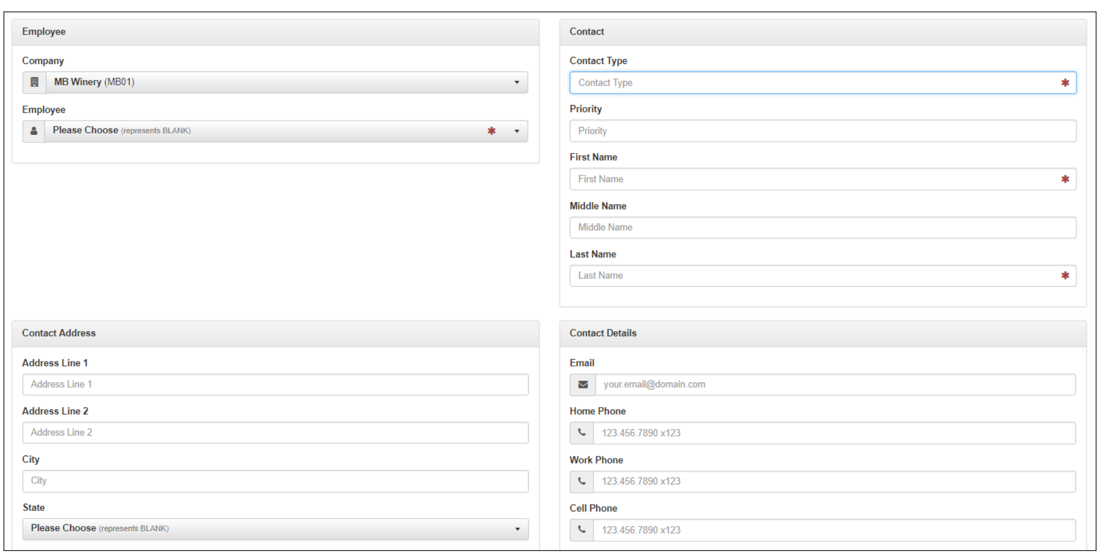


Emergency Contact

Provides details concerning emergency contact information for the employee.



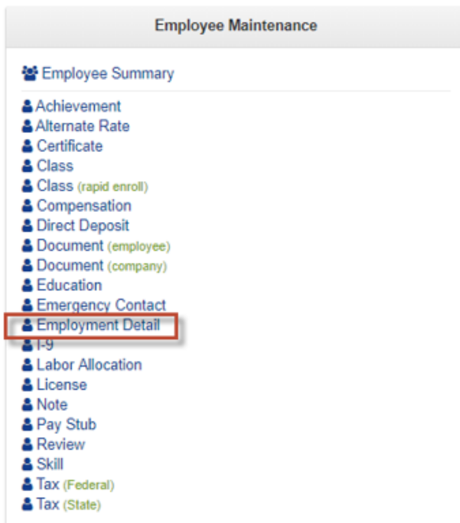
To add a new contact for an employee, click the **+ New** button and complete the information on the screen.



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**.

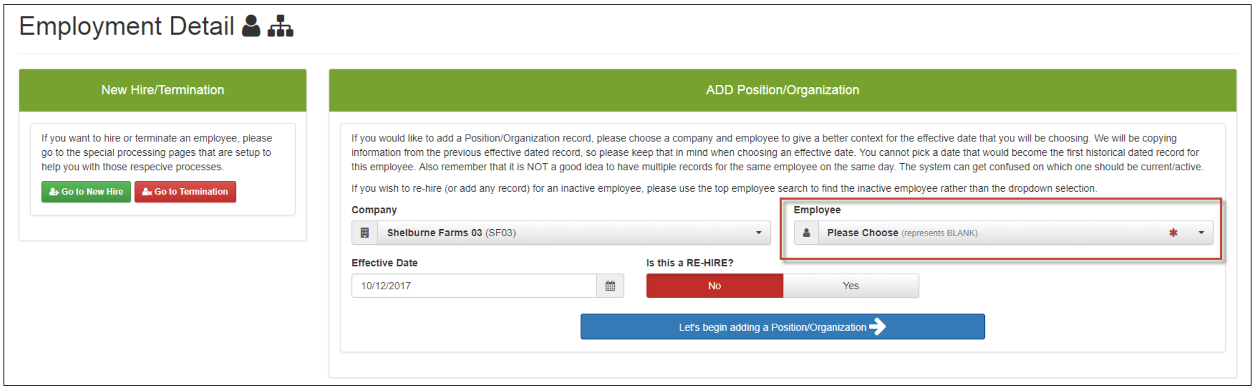


When selected, the **Employment Detail** will open a Dashboard that will allow for:

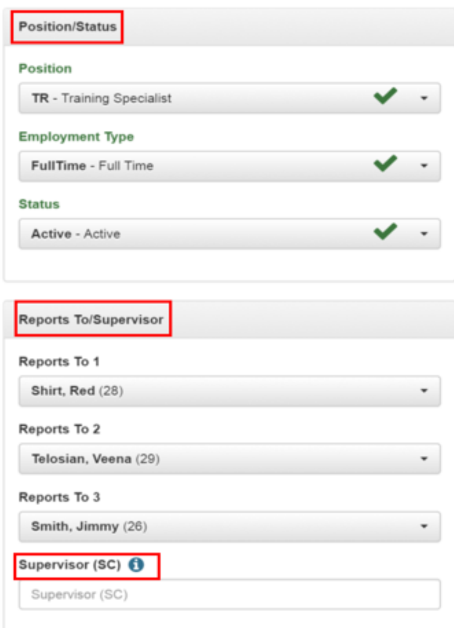
- New hire/Termination
- Position Organization
- Rehiring
- Effective Dating

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.



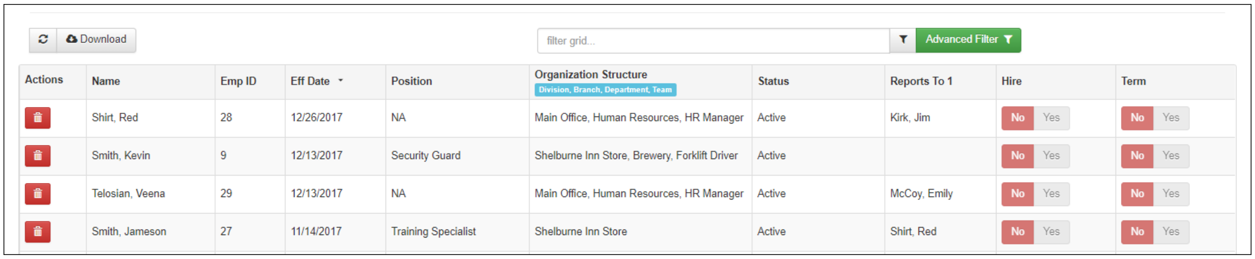
Scroll down the **Position/Status** tile and the **Reports To/Supervisor** tile:

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.

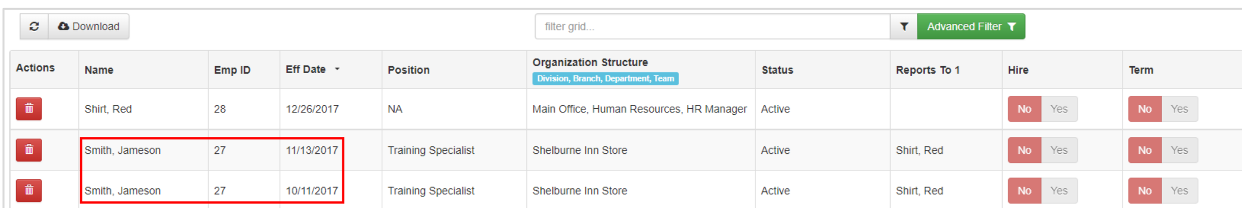
Employment Detail Dashboard

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 (Division, Branch, Department, Team)	Status	Reports To 1	Hire	Term
	Shirt, Red	28	12/26/2017	NA	Main Office, Human Resources, HR Manager	Active	Kirk, Jim	No Yes	No Yes
	Smith, Kevin	9	12/13/2017	Security Guard	Shelburne Inn Store, Brewery, Forklift Driver	Active		No Yes	No Yes
	Telosian, Veena	29	12/13/2017	NA	Main Office, Human Resources, HR Manager	Active	McCoy, Emily	No Yes	No Yes
	Smith, Jameson	27	11/14/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	No Yes	No 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 (Division, Branch, Department, Team)	Status	Reports To 1	Hire	Term
	Shirt, Red	28	12/26/2017	NA	Main Office, Human Resources, HR Manager	Active		No Yes	No Yes
	Smith, Jameson	27	11/13/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	No Yes	No Yes
	Smith, Jameson	27	10/11/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	No Yes	No 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.

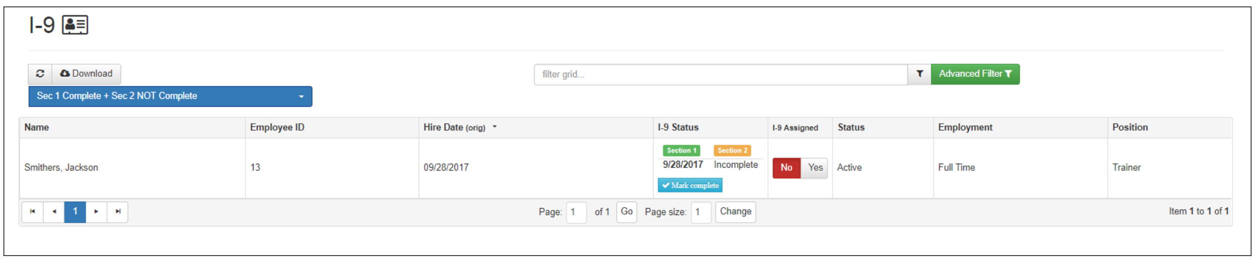
If you wish to re-hire (or add any record) for an inactive employee, please use the top employee search to find the inactive employee rather than the dropdown selection.

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.

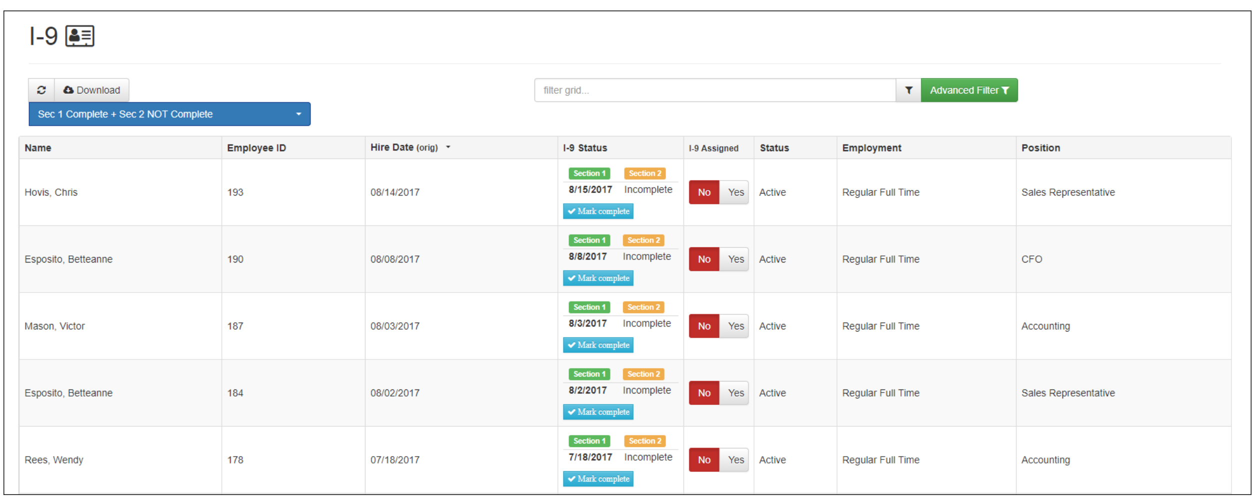
All the I-9 information is stored *on* the employee record itself.

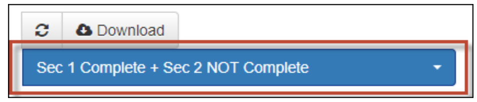
- The employee self onboards and completes Section 1 of the I-9
- Admins/Managers *cannot* do anything with **Section 1**, other than marking it (manually) as **Complete/Incomplete** and Assigning it to the employee. By "assigning it", it displays for the Employee to do, fix, update, or complete **Section 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.



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

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

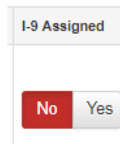




The filter at the top left of the I-9 screen allows the **Admin/Manager** to filter the types of I-9 Status to show. You can select the following views:

- 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

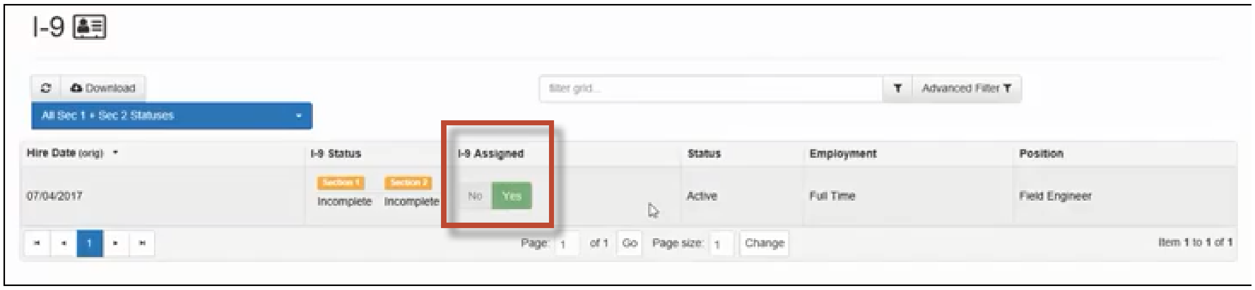


You can use the **I-9 Assigned** column field to open the **Section 1** of the I-9 Form in order for the employee to do something to their I-9, for example if the employee didn't fill out the I-9 during onboarding.

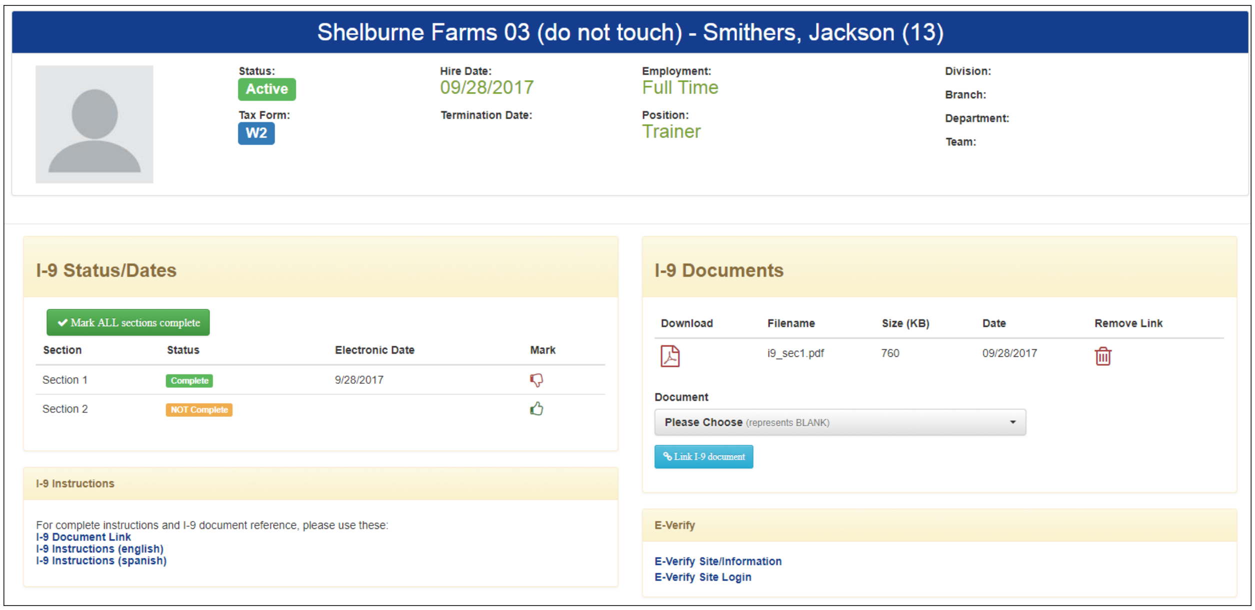
In the **I-9 Assigned** column – change the **Yes** / **No** toggle switch from **No** to **Yes** to assign the I-9 task to the employee. The system assigns the I-9 to the employee and sends an email to the employee indicating a request to go fill out or complete their I-9 document which includes a link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

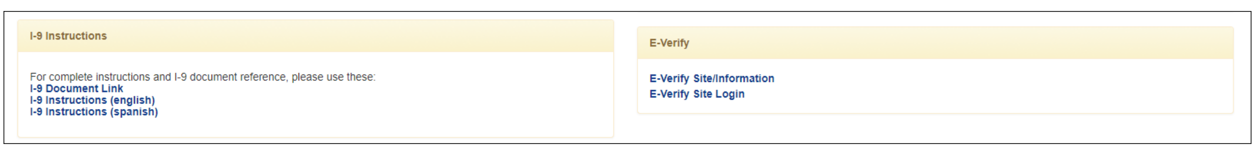
To do this, **you also need to change the Status** of the I-9 from **Complete** to **Not Complete** in order to be able to assign a completed I-9 back to the employee. You can do this manually, in the **I-9 Status/Dates** section of the screen, in the **Mark** column, by clicking on the Thumbs Up/Down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



3. 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.

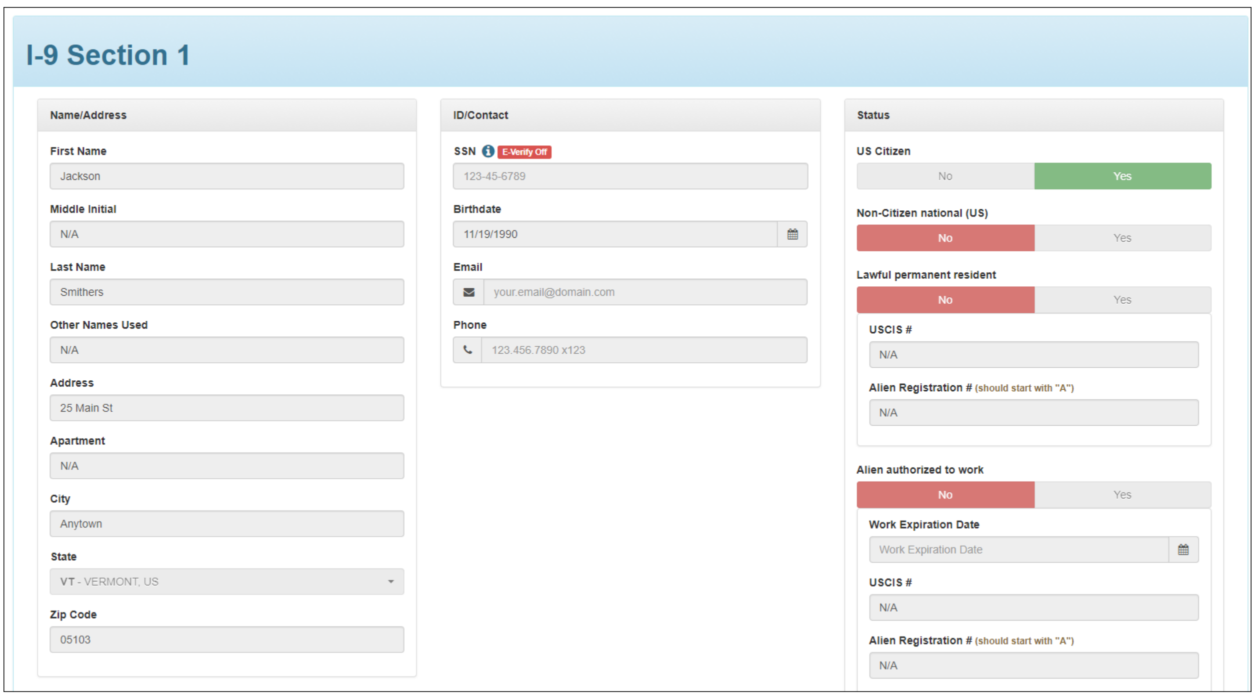


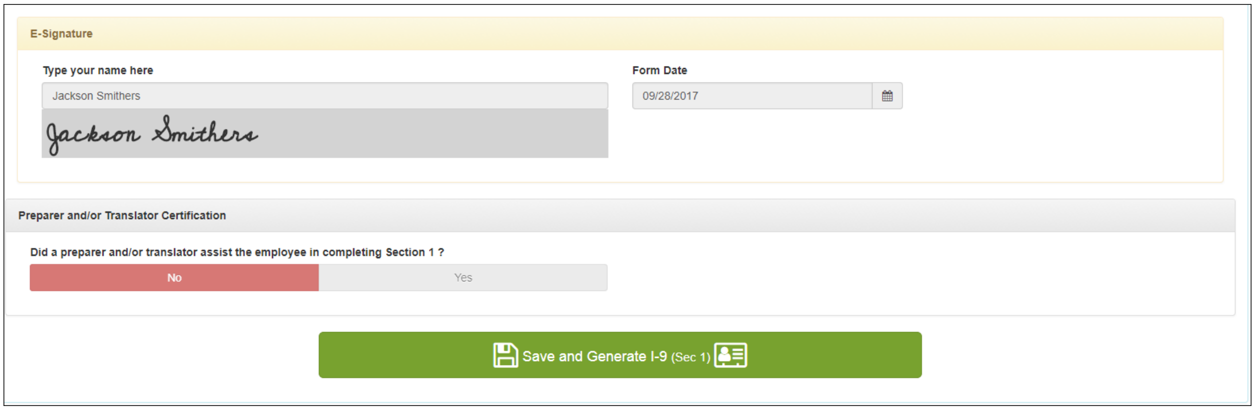


The top section of the I-9 screen contains the employee I-9 information, links to the I-9 Instructions and to E-Verify and to the physical I-9 Documents which you can click on such as the actual I-9 Section 1 portion that the employee completed.

I-9 Section 1

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





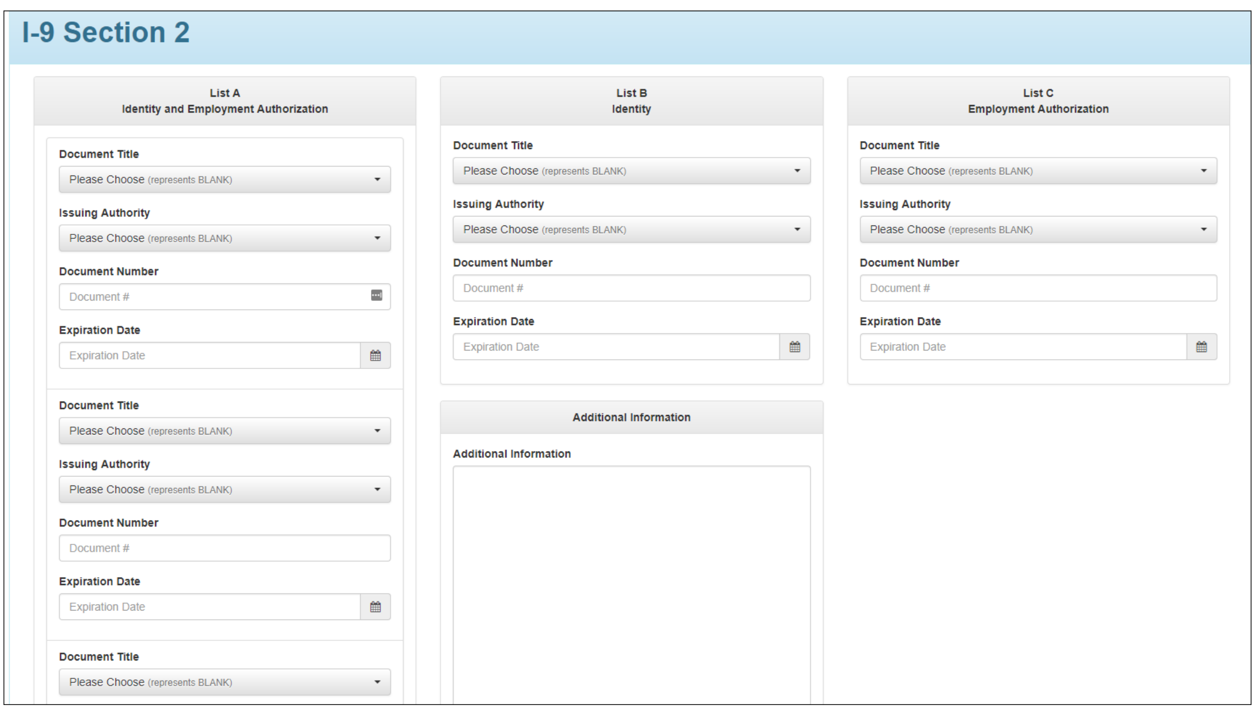
Providing your 9-digit Social Security Number is voluntary on Form I-9 unless your employer participates in E-Verify.

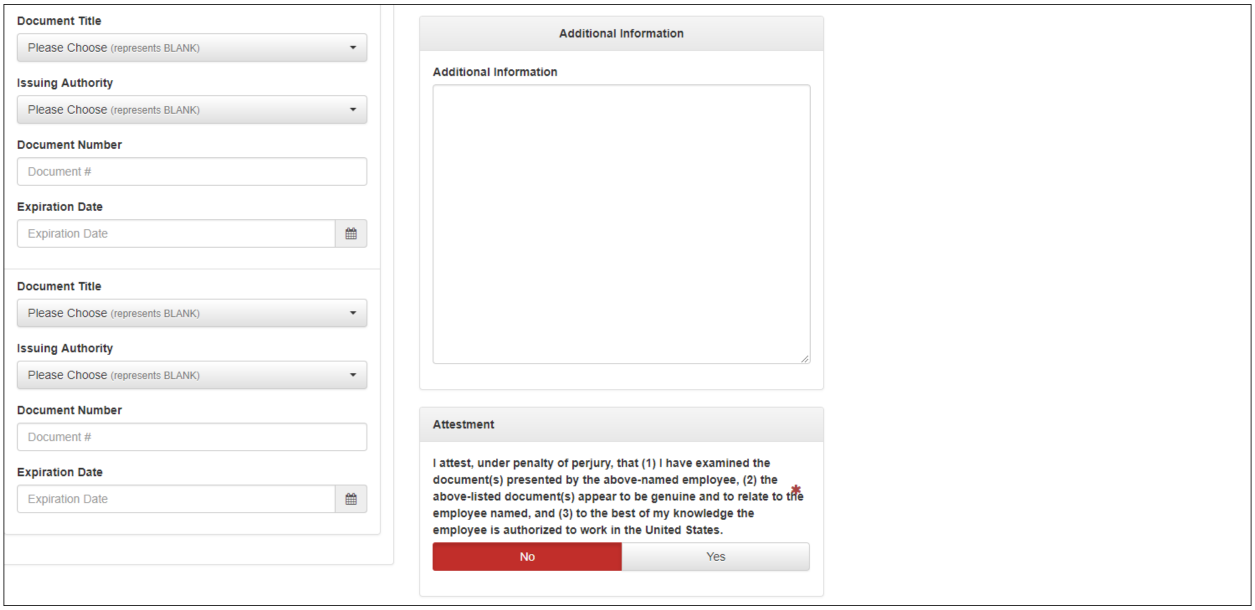
If your employer participates in E-Verify and:

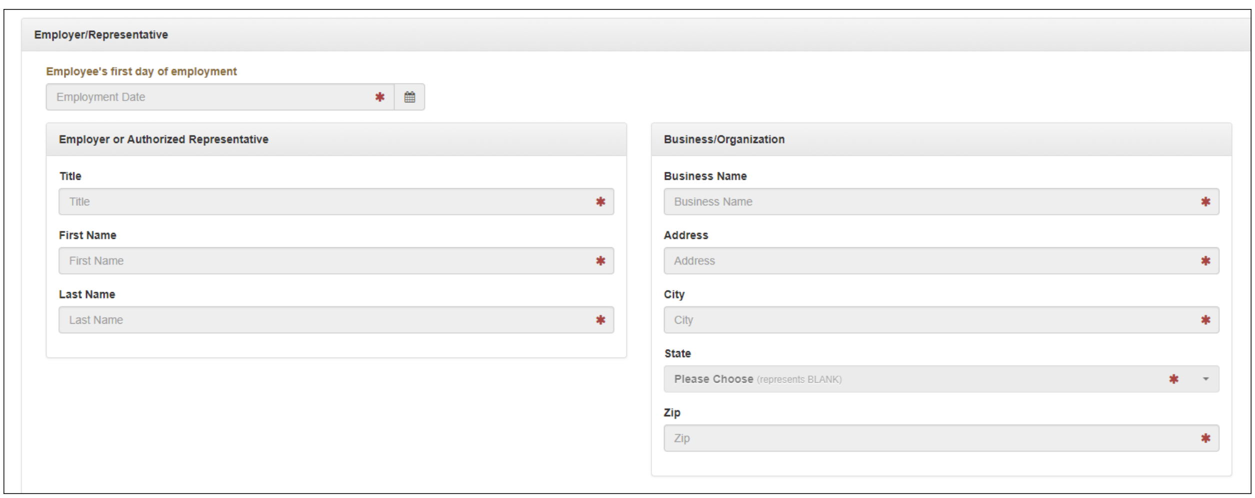
1. You have been issued a Social Security number, you must provide it in this field; or
2. You have applied for, but have not yet received a Social Security number, leave this field blank until you receive a Social Security number.

I-9 Section 2

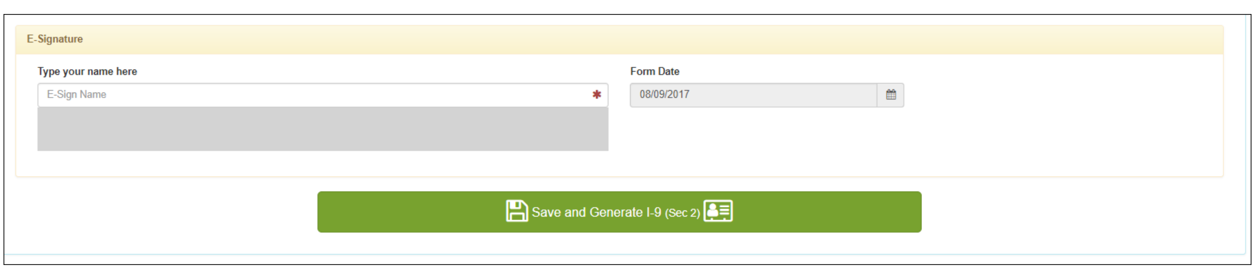
The common workflow is the **Admin/Manager** will display the Section 2 section of the I-9 screen to complete the employer portion. The employee does not have access to Section 2. The screen mimics the online Smart I-9 Form.



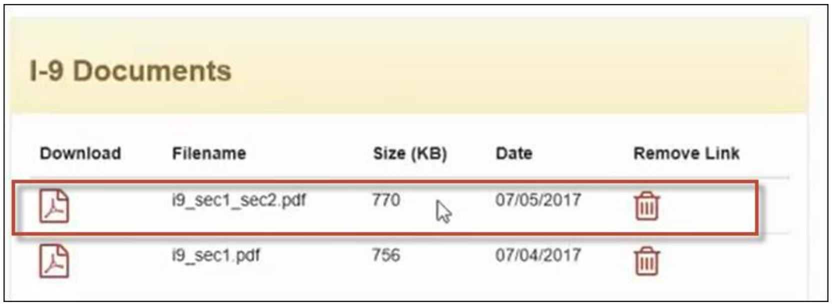




The **Admin/Manager** clicks **Yes** to the **Attestment** section, signs the **E-Signature** section and clicks the **Save and Generate I-9 (Sec 2)** button.

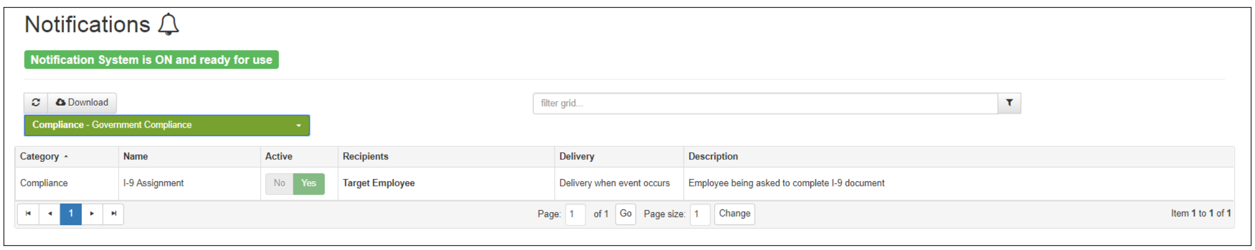


The system then generates the document and you can see it now listed in the **I-9 Documents** section of the screen at the top.

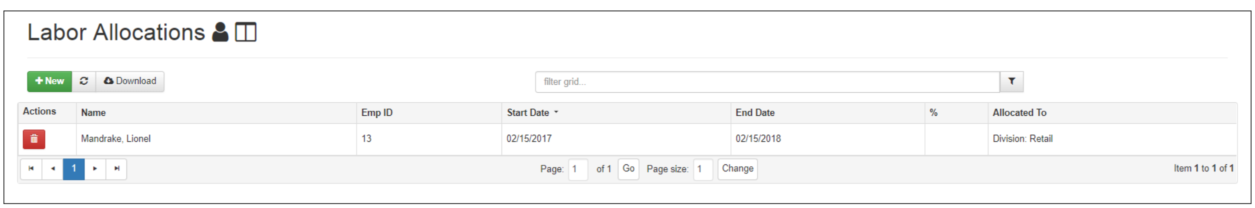


I-9 Related Employee Notification

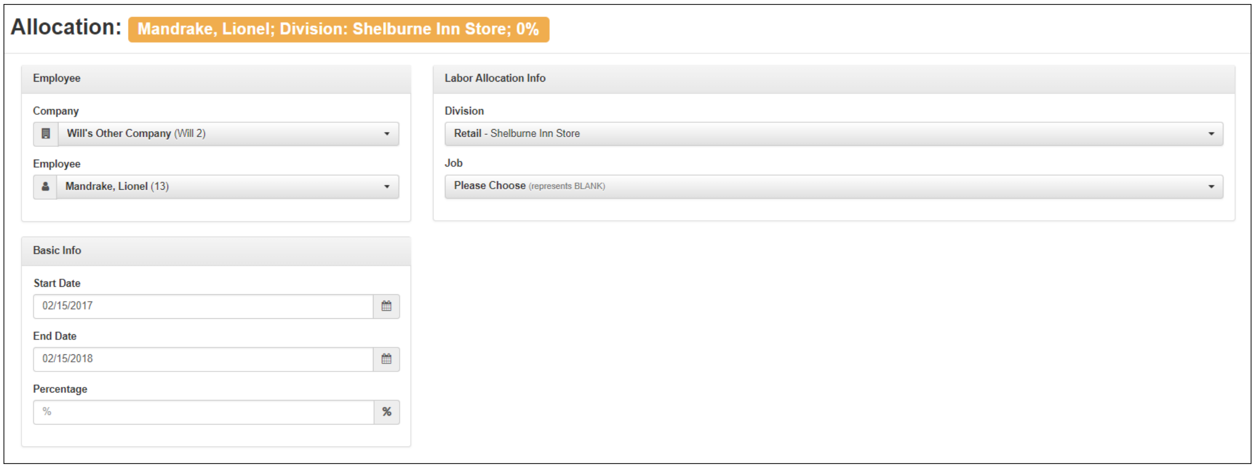
Admins can set up a Notification to inform an employee that they are being asked to complete an I-9 document. Go to **HR Admin – Communications – Notifications** and select the **Compliance Category**.

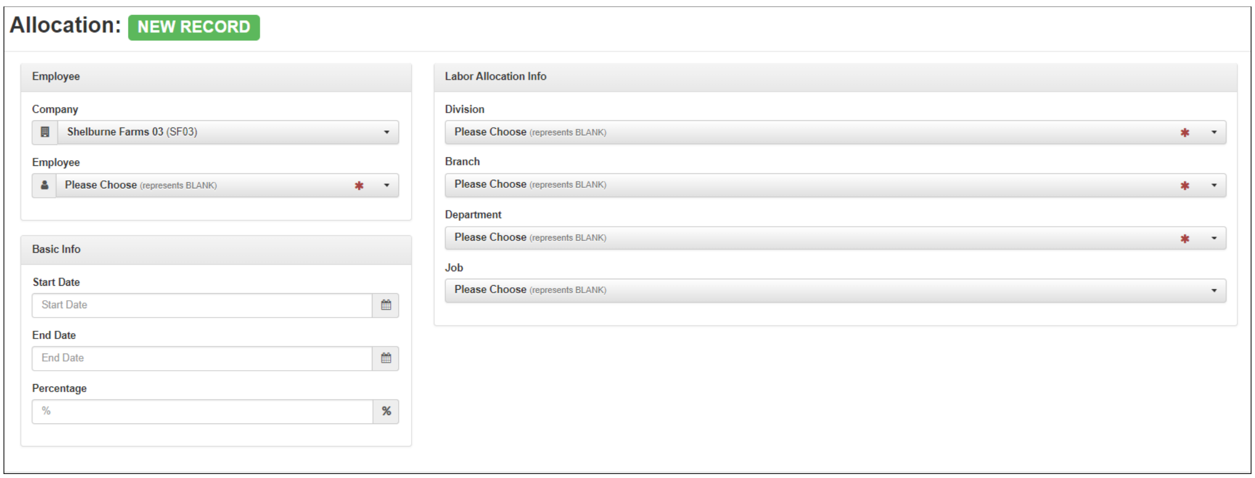


Labor Allocation



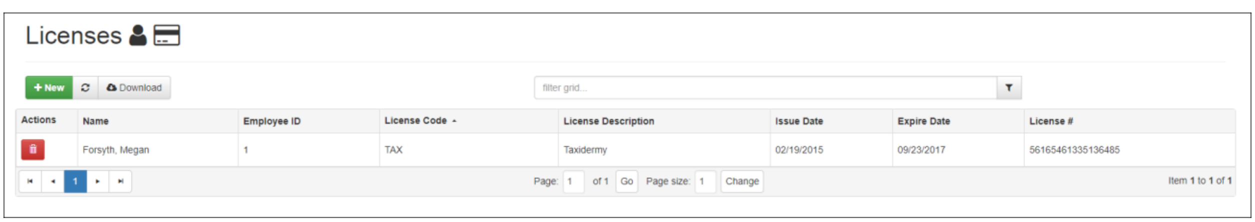
Click on a row to display the Details screen.

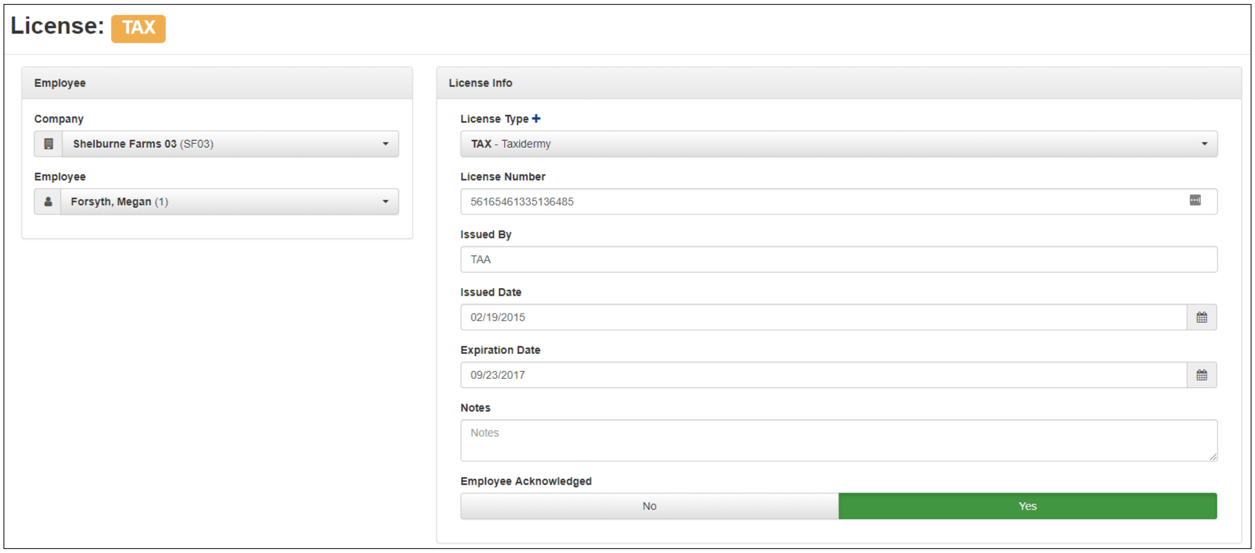




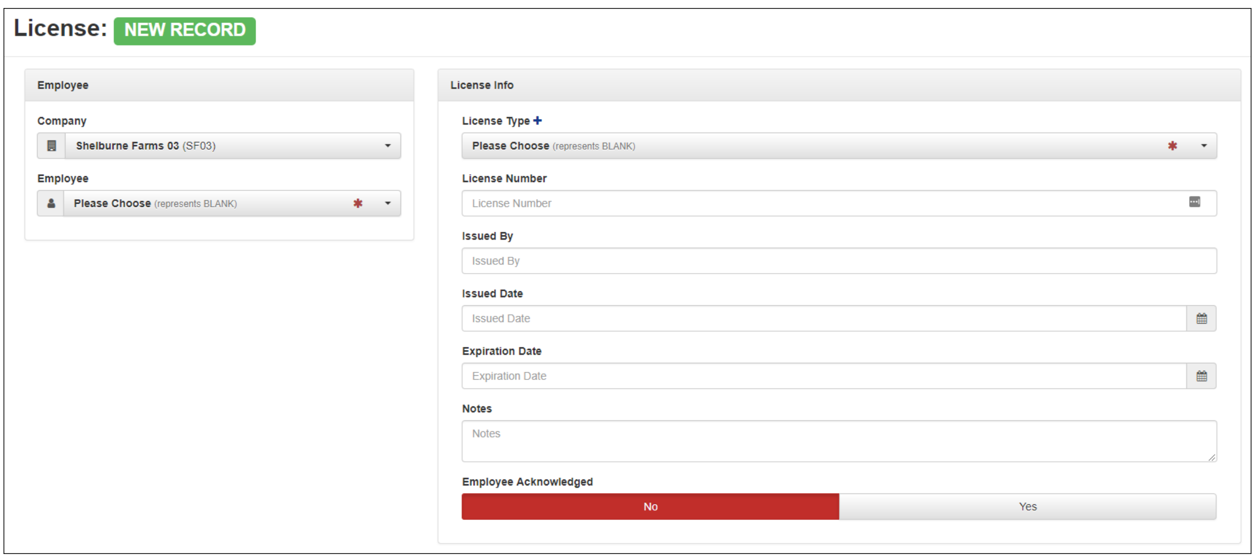
License

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



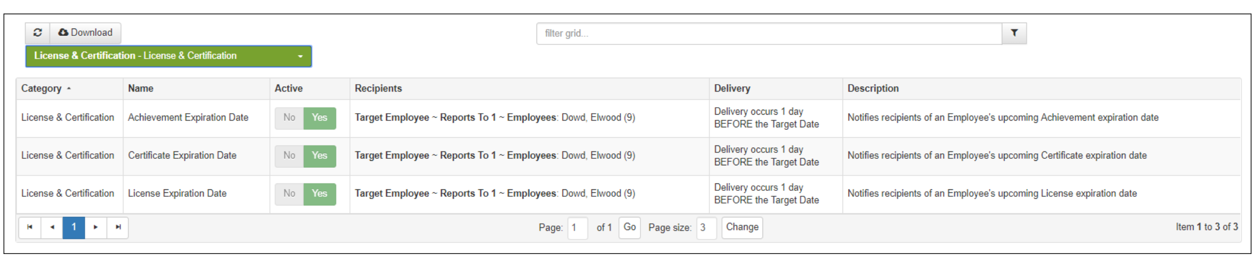


Click on the **+ New** button to add a new license record for the employee.



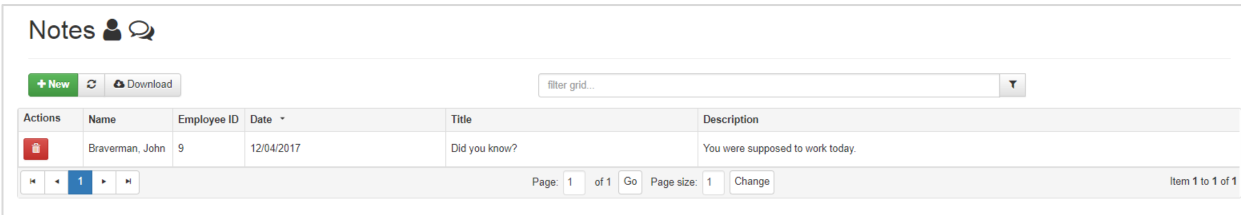
Expiring License Notifications

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

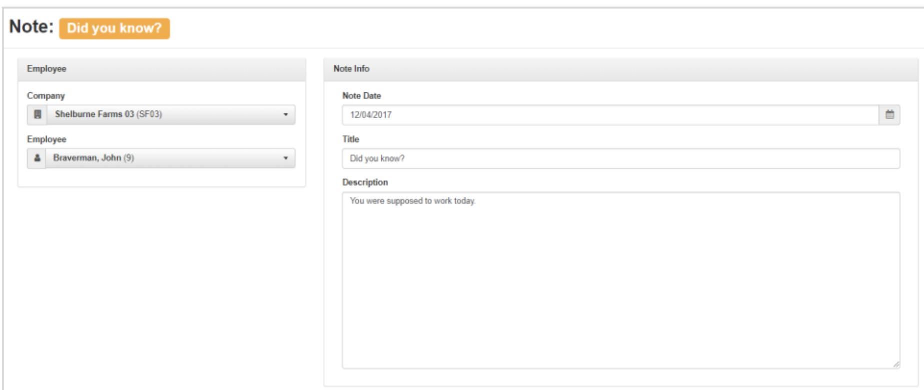


Note

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.

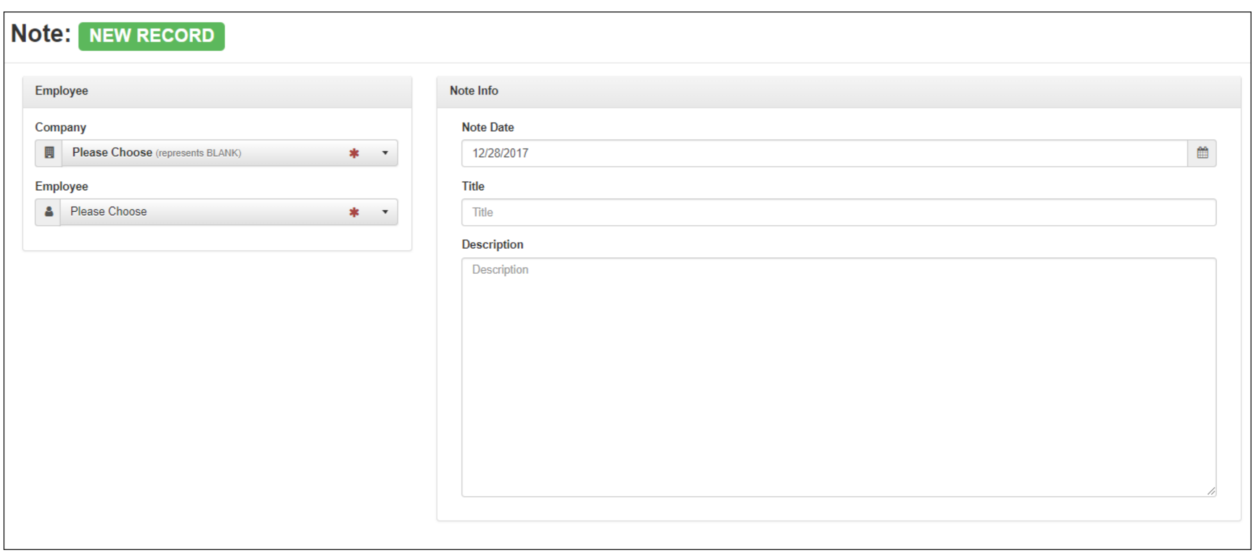


Click on a row to display the Details screen.



To create a new note:

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



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.

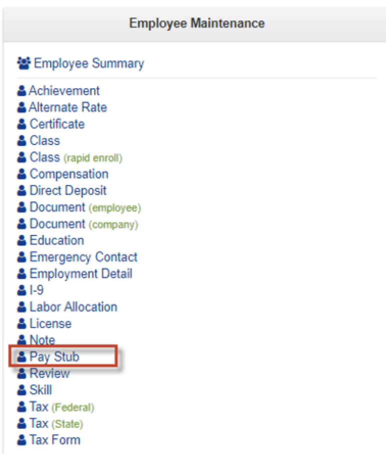
Enter a **Title** for the Note.

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

Click **Save**.

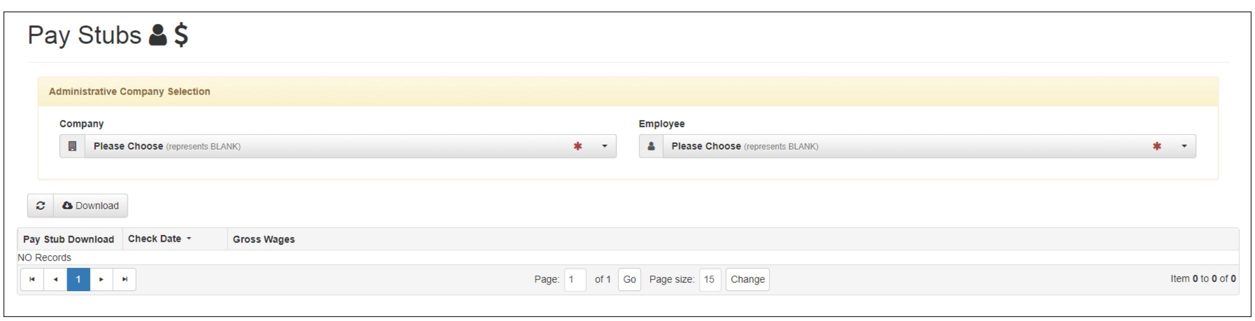
Pay Stub

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



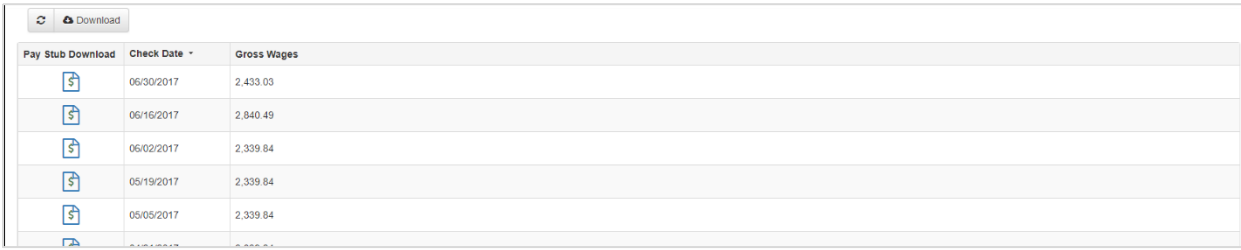
Go to **HR Admin – Employee Maintenance – Pay Stub**

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



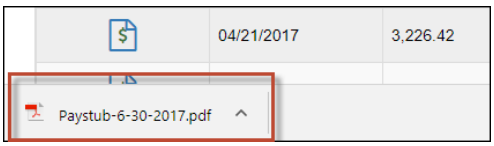
Select the **Company** and the **Employee** for which you want to display the Pay Stub for in the **Company** and **Employee** dropdowns. If you were already locked into a **Company**, then just select the **Employee**.

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

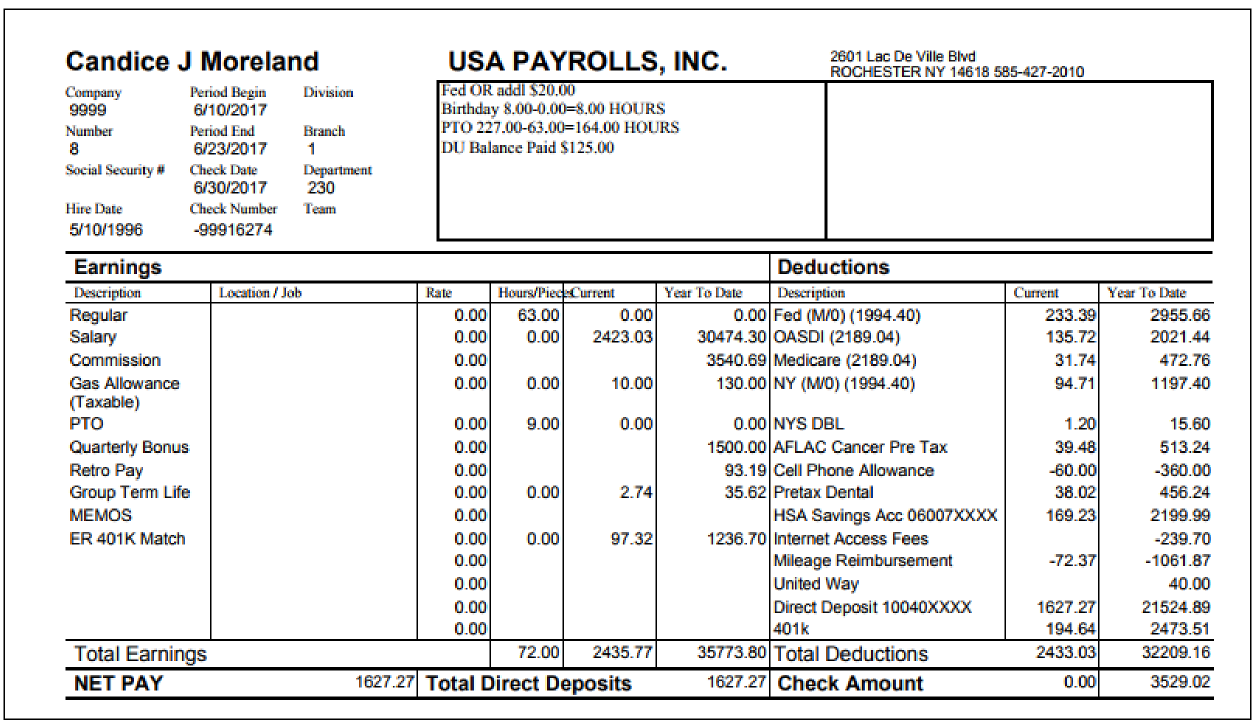


Pay Stub Download	Check Date	Gross Wages
	06/30/2017	2,433.03
	06/16/2017	2,840.49
	06/02/2017	2,339.84
	05/19/2017	2,339.84
	05/05/2017	2,339.84

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.



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.



Candice J Moreland

USA PAYROLLS, INC.
2601 Lac De Ville Blvd
ROCHESTER NY 14618 585-427-2010

Company	Period Begin	Division
9999	6/10/2017	
Number	Period End	Branch
8	6/23/2017	1
Social Security #	Check Date	Department
	6/30/2017	230
Hire Date	Check Number	Team
5/10/1996	-99916274	

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

Earnings

Description	Location / Job	Rate	Hours/Piece	Current	Year To Date
Regular		0.00	63.00	0.00	0.00
Salary		0.00	0.00	2423.03	30474.30
Commission		0.00			3540.69
Gas Allowance (Taxable)		0.00	0.00	10.00	130.00
PTO		0.00	9.00	0.00	0.00
Quarterly Bonus		0.00			1500.00
Retro Pay		0.00			93.19
Group Term Life		0.00	0.00	2.74	35.62
MEMOS		0.00			
ER 401K Match		0.00	0.00	97.32	1236.70
		0.00			
		0.00			
		0.00			
		0.00			
Total Earnings			72.00	2435.77	35773.80

Deductions

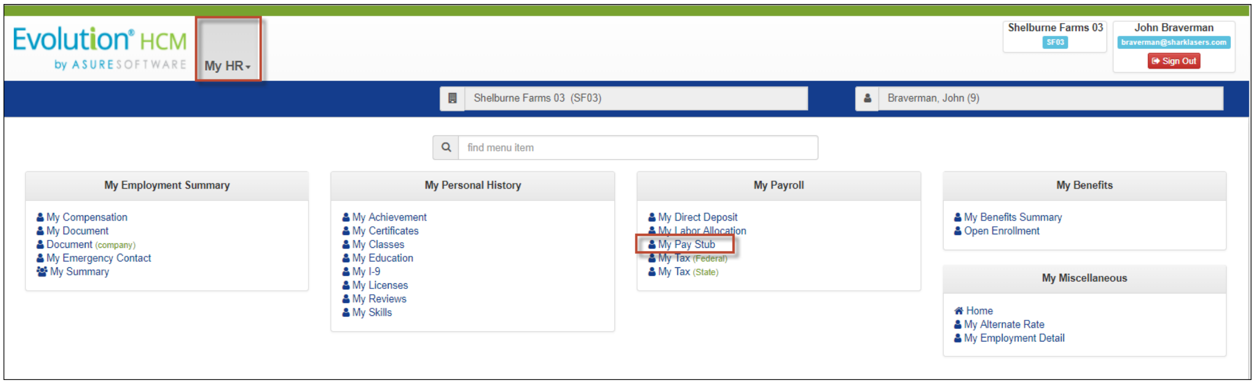
Description	Current	Year To Date
Fed (M/0) (1994.40)	233.39	2955.66
OASDI (2189.04)	135.72	2021.44
Medicare (2189.04)	31.74	472.76
NY (M/0) (1994.40)	94.71	1197.40
NYS DBL	1.20	15.60
AFLAC Cancer Pre Tax	39.48	513.24
Cell Phone Allowance	-60.00	-360.00
Pretax Dental	38.02	456.24
HSA Savings Acc 06007XXXX	169.23	2199.99
Internet Access Fees		-239.70
Mileage Reimbursement	-72.37	-1061.87
United Way		40.00
Direct Deposit 10040XXXX	1627.27	21524.89
401k	194.64	2473.51
Total Deductions	2433.03	32209.16

NET PAY	1627.27	**Total Direct Deposits**	1627.27	**Check Amount**	0.00	3529.02

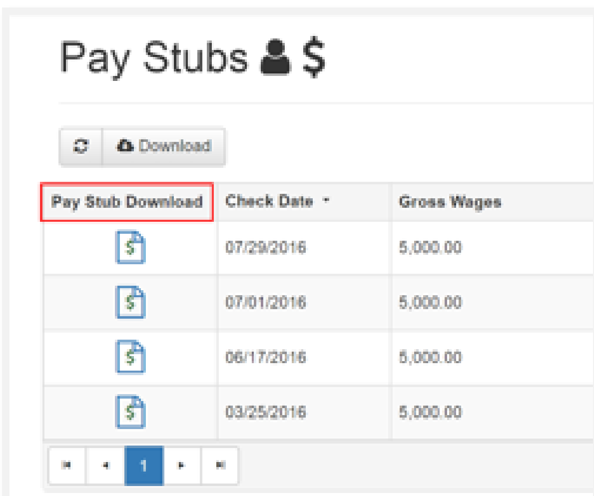
You can print or save the pay stub file.

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**:

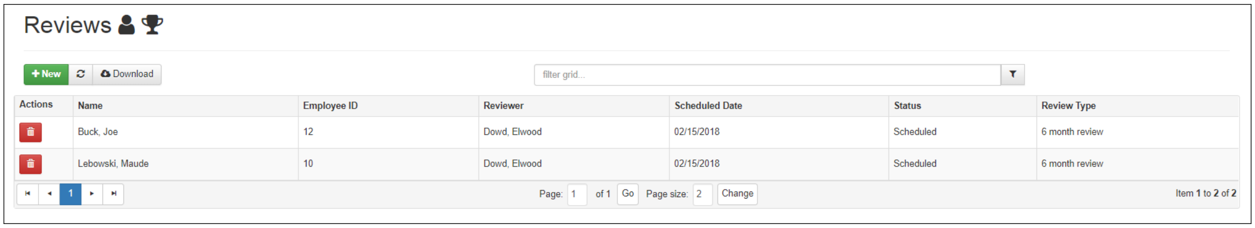


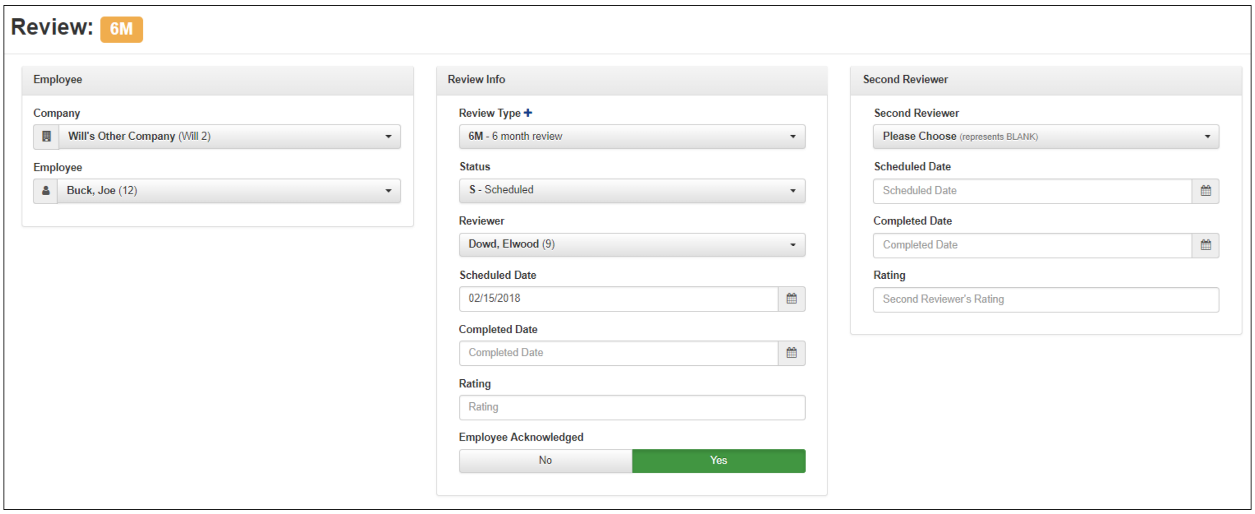
The Pay Stubs Dashboard will allow the employee to:

- 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.

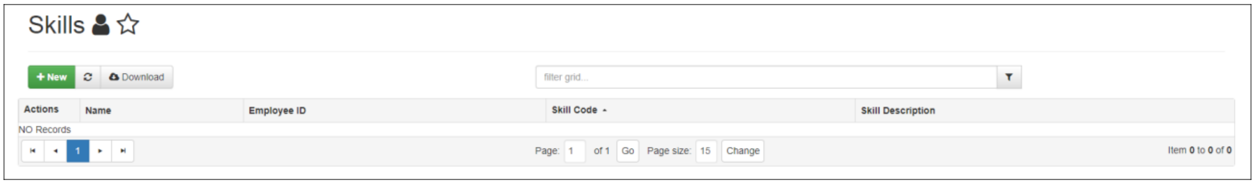

Reviews
New
Download
filter grid...
Actions
Name
Employee ID
Reviewer
Scheduled Date
Status
Review Type
Buck, Joe
12
Dowd, Elwood
02/15/2018
Scheduled
6 month review
Lebowski, Maude
10
Dowd, Elwood
02/15/2018
Scheduled
6 month review
Page: 1 of 1 Go Page size: 2 Change
Item 1 to 2 of 2

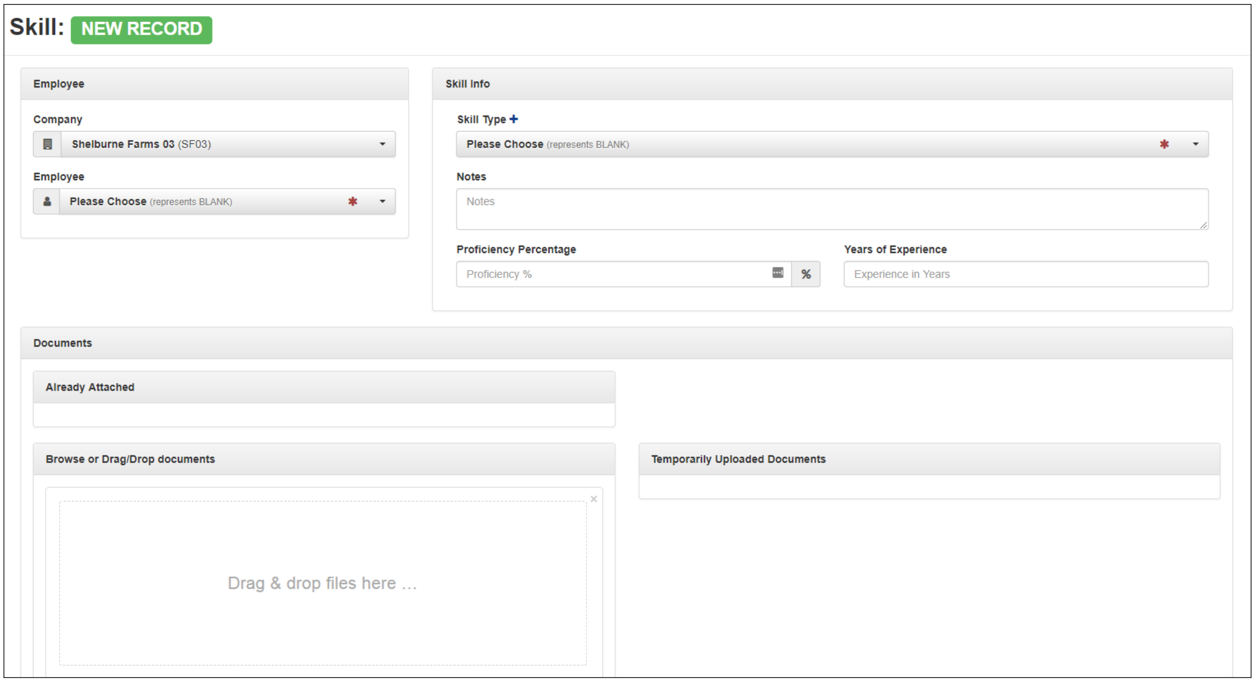

Review: 6M
Employee
Company
Will's Other Company (Will 2)
Employee
Buck, Joe (12)
Review Info
Review Type
6M - 6 month review
Status
S - Scheduled
Reviewer
Dowd, Elwood (9)
Scheduled Date
02/15/2018
Completed Date
Completed Date
Rating
Rating
Employee Acknowledged
No
Yes
Second Reviewer
Second Reviewer
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

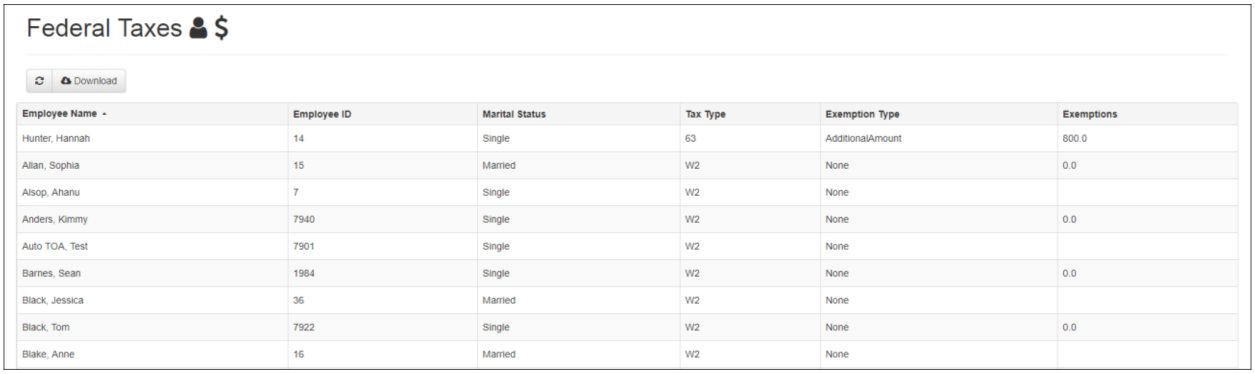
View a comprehensive list of all skills the employee has achieved. Clicking on an individual skill on the summary screen provides basic details of the specific skill.





Tax - (Federal)

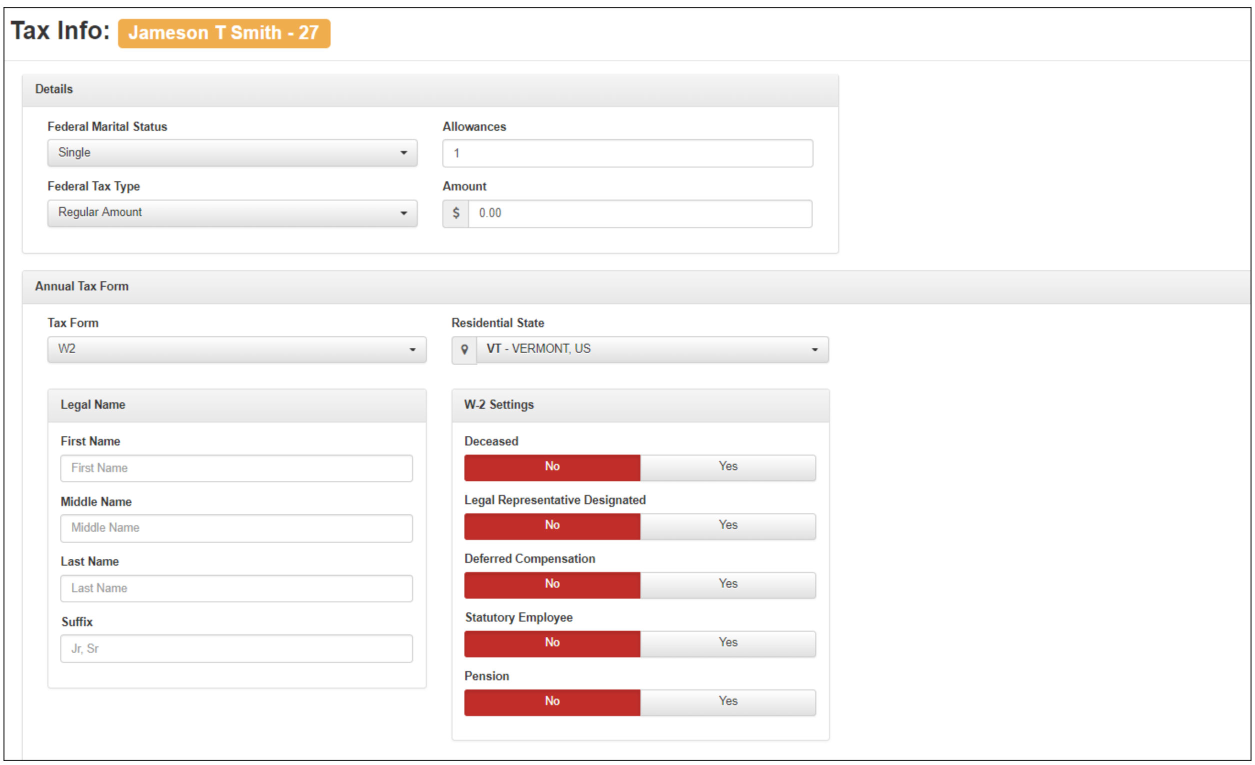
Select **HR Admin – Employee Maintenance – Tax (Federal)** to display/add an employee's Federal Tax information.

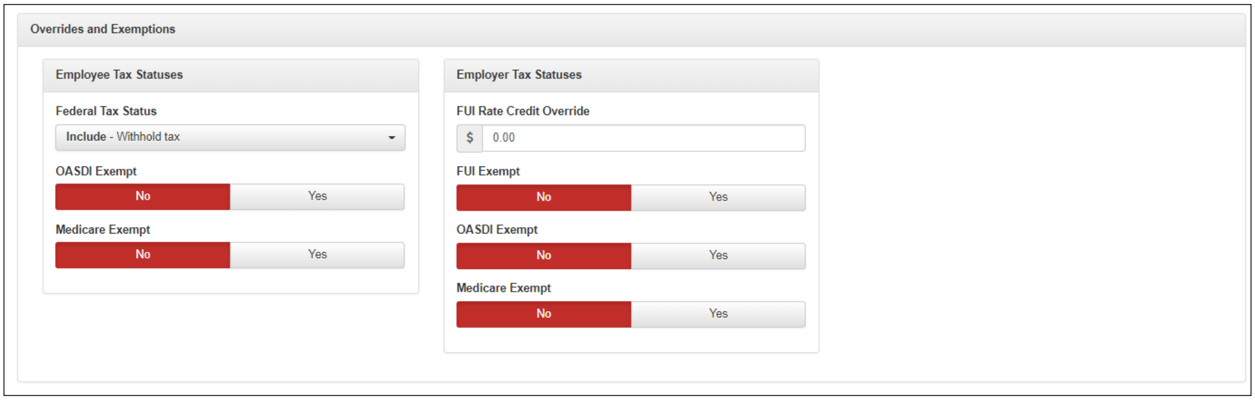

Federal Taxes

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	

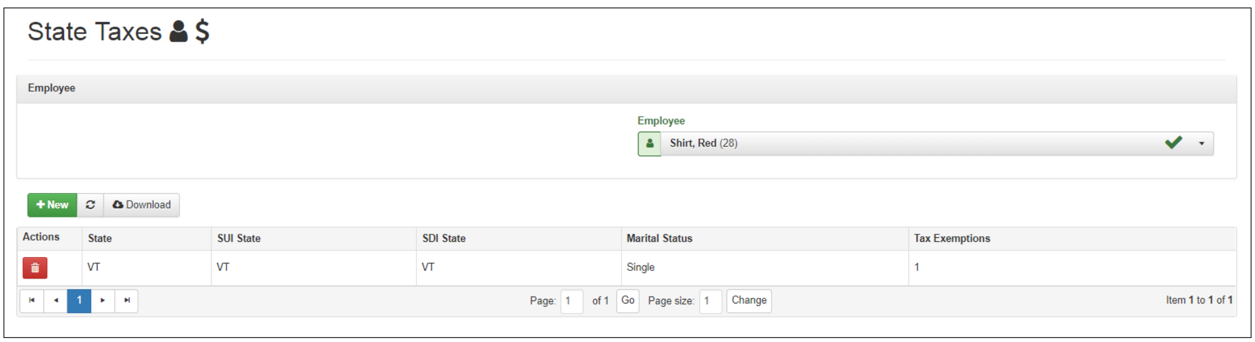
Click on an employee row to get the Federal Tax detail information.

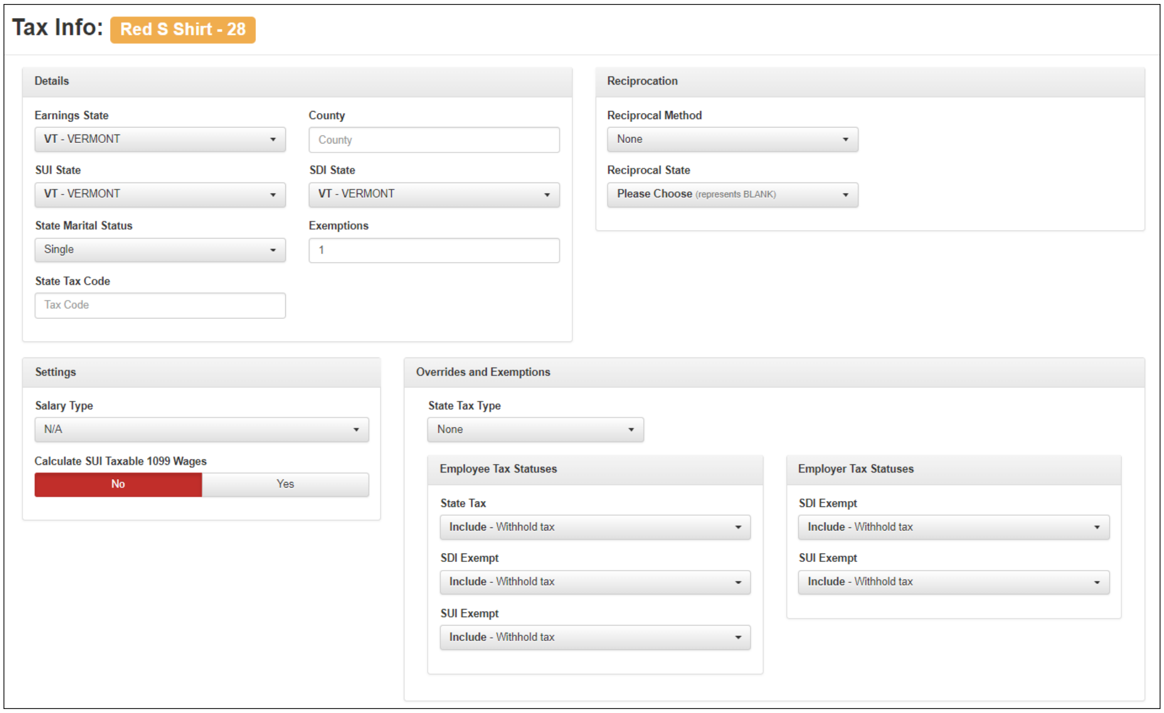




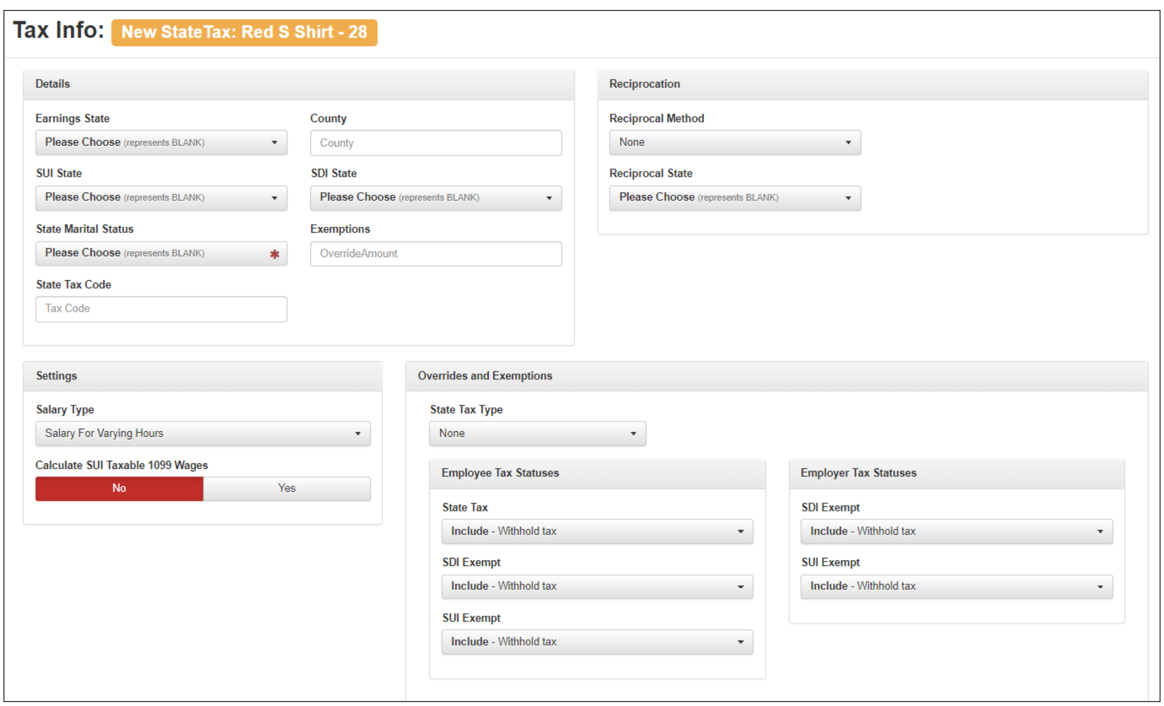
Tax - (State)

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





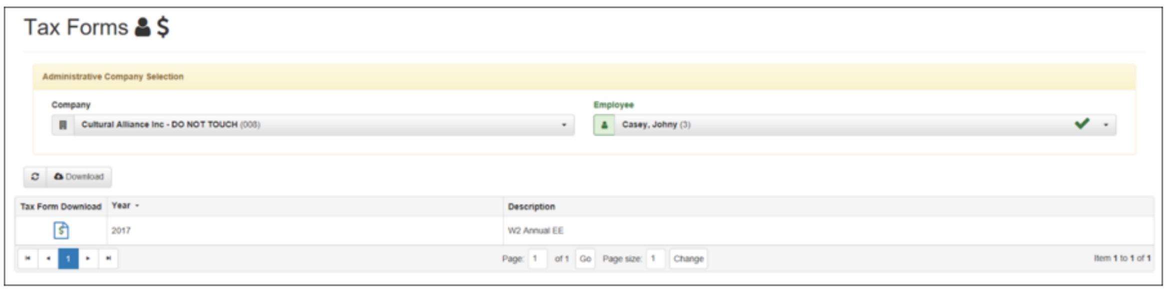
And here is the screen the user receives when adding a new State Taxes record:



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.

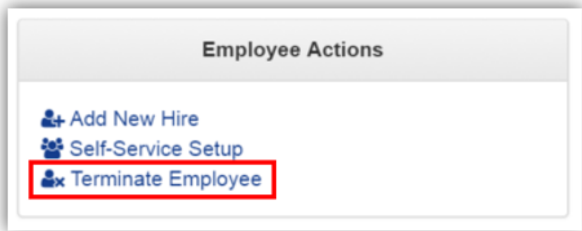
Tax forms include: EE W2 Electronic Copy, EE 1095B Electronic Copy, EE 1095C Electronic Copy, and 1099-Misc.



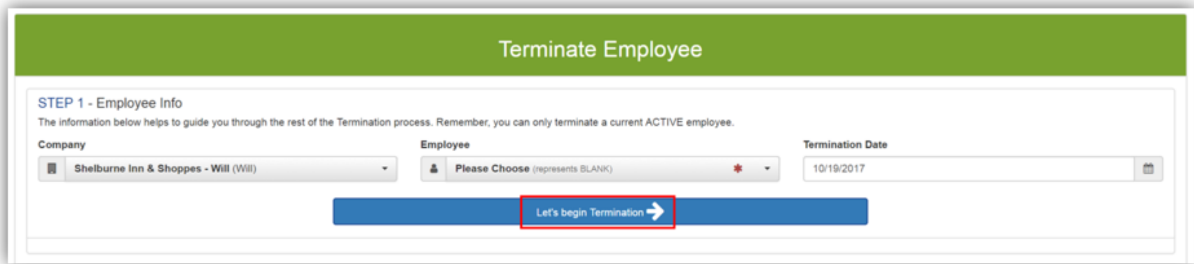
Terminating an Employee

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.**

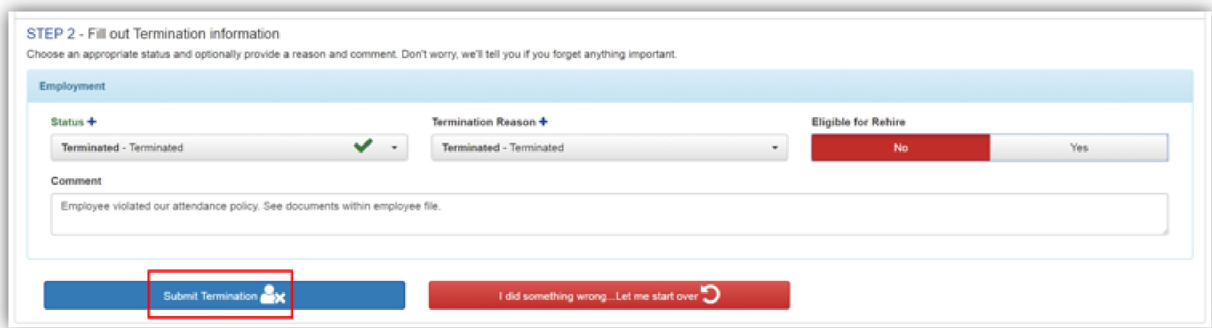


The two-step **Terminate Employee** wizard will walk you through the process.



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

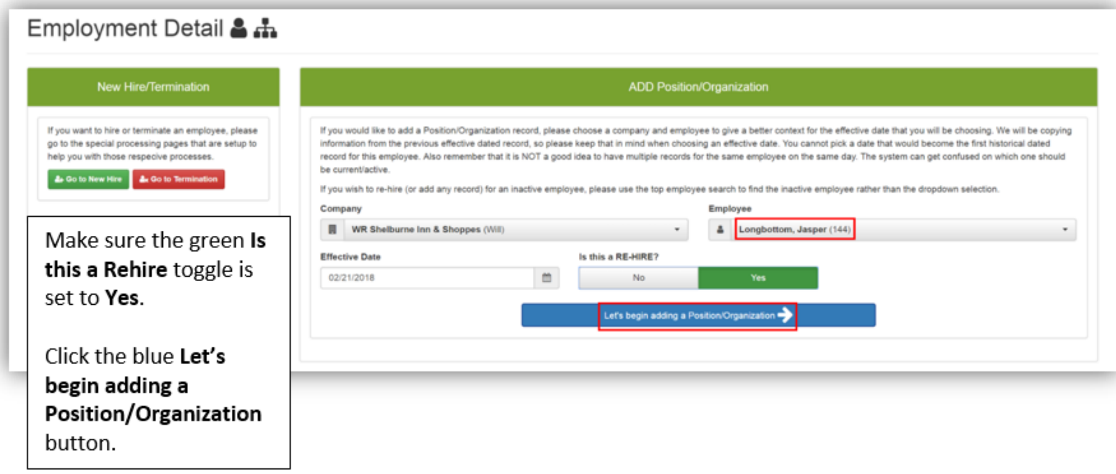
Click the blue **Submit Termination** button when complete

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.

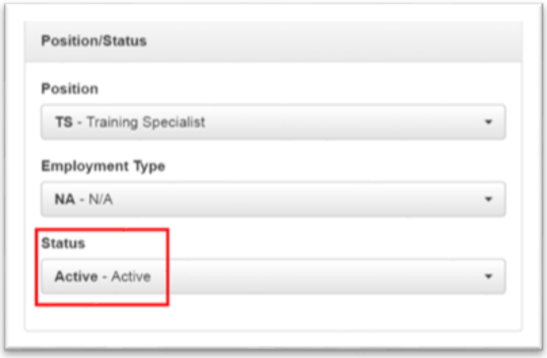
Re-Hiring an Employee

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:



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



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: