



Human Resources User Guide

A photograph of three business professionals (two women and one man) smiling and looking at a tablet together. The image is overlaid with a blue tint.

iSolved

Human Resources Guide

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HR Management

HR Data Screens

The HR screens in iSolved provide the tracking mechanism to offer insight to manage employees effectively. HR data can store information about:

1. Awards
2. Certifications
3. Education
4. Skills
5. Training
6. Disciplinary Offenses
7. Company Asset Types
8. Performance Reviews

The data is available through self-service to the employee, manager/supervisor and HR admin. Managers or supervisors can accurately make job changes, promotions or performance evaluation decisions when the data is easily accessible.

Getting Started

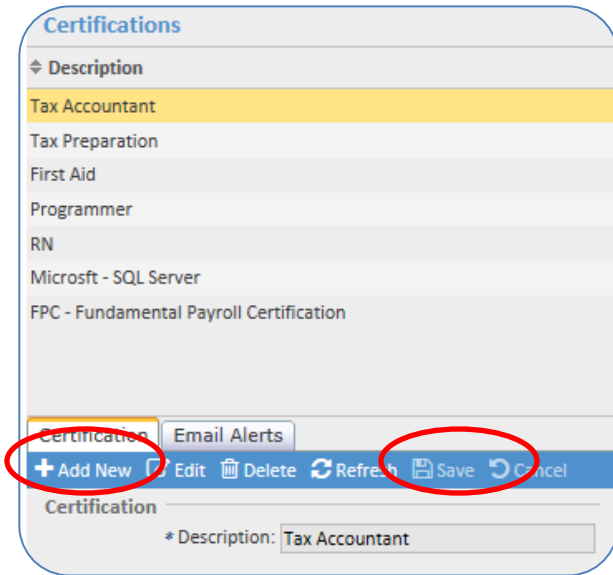
To get started, enter the HR data that is most important to your business under the Client Management> HR Management. Then assign the HR information (i.e., skill, award or certificate) as the employees earn them on the appropriate Employee Management> Human Resources screen. All the HR screens have corresponding reports and the data is also available in report writer, providing the ability for custom reporting.

Certifications



Navigate to **Client Management> HR Management> Certifications**

What types of certifications do your employees hold? When should they be recertified? Add each of the certifications that an employee may earn while employed at your company. This list will then become a drop-down that you can select for each employee. You may add to the list at any time.

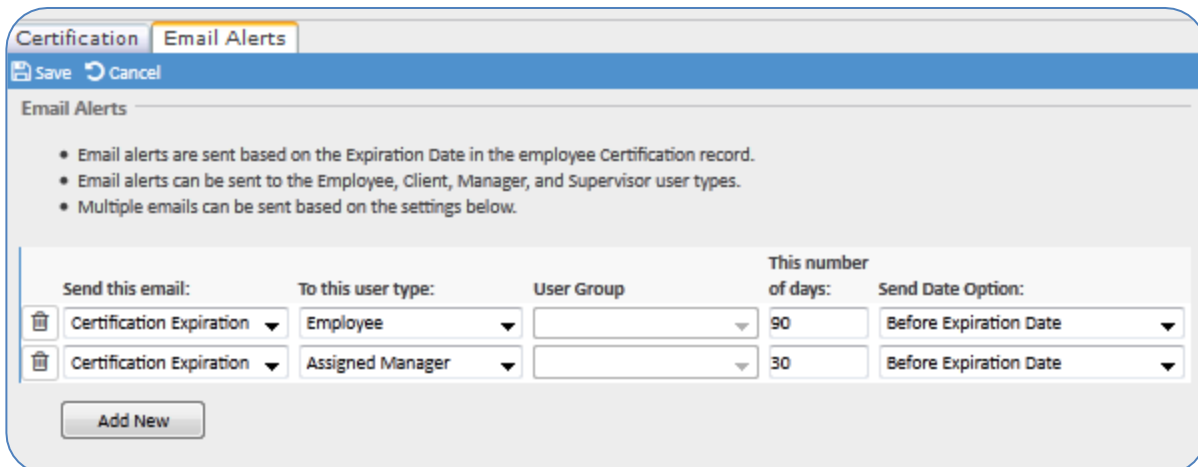


- Click on the [Add New] icon.
- Enter the name of the Certification.
- Click on the [Save] icon.

Email alerts

Employees, managers or admin may be notified by email when the employee's certification is ready to expire or has recently expired. Select the **Email Alerts** tab.

- Using the certification email alerts feature is not a requirement for certifications.
- Certification email alerts are generated daily at 5 p.m., ET.
- The expiration date on the employee's certification screen determines when email alerts are generated, based on parameters you create on the email alerts tab.
- Alerts will not be generated for inactive or terminated employees.
- Email templates need to be created for the certification email alerts.
- Multiple emails can be sent for each certification (see screen shot).





Note: To create an email template or a client user group, navigate to **Client Management> Workflow Setup> Client User Group** and **Email Templates**.

Please refer to your Workflow documentation for more about setting up User Groups and Email Templates.

In order to schedule the Email Alerts, select the **Email Template** set up for this certification from the drop down box and select a **User Group**. There are four types of User Groups:

- **Employee:** Email will be sent to the employee
- **Manager:** Email will be sent to the employee's manager. If the employee doesn't have a manager assigned, no email is sent
- **Supervisor:** Email will be sent to the employee's supervisor. If the employee doesn't have a supervisor assigned, no email is sent
- **Client User Groups:** Email will be sent to every client user in the client user group

User Group – Drop-down with a list of all client user groups. Drop-down is only available if the user type you chose was client user groups.

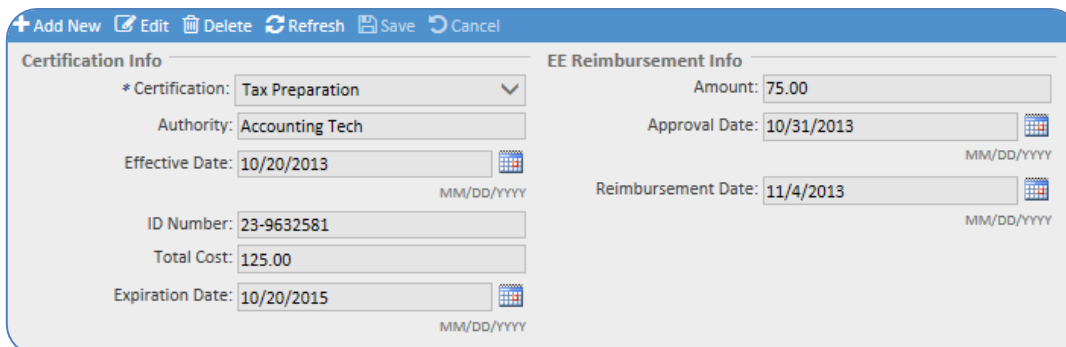
This number of days – Field to enter a number of days.

Send Date Option – Drop-down containing the selection of **Days Before Expiration Date** and **Days After Expiration Date**.

Employee Certifications



Navigate to **Employee Management>Human Resources>Certifications**



The screenshot shows a web form for adding a new certification. At the top, there are navigation buttons: Add New, Edit, Delete, Refresh, Save, and Cancel. The form is divided into two main sections: Certification Info and EE Reimbursement Info.

Field	Value
* Certification	Tax Preparation
Authority	Accounting Tech
Effective Date	10/20/2013
ID Number	23-9632581
Total Cost	125.00
Expiration Date	10/20/2015
EE Reimbursement Info - Amount	75.00
EE Reimbursement Info - Approval Date	10/31/2013
EE Reimbursement Info - Reimbursement Date	11/4/2013

- Click on the [Add New] icon.
- Select the **Certification** from the drop-down (required).
- Add **Authority** (optional).

- Enter **Effective Date** (optional).
- Enter **Expiration Date** (required if you are using the e-mail alert).
- Enter **ID Number** and **Total Cost** (optional).
- Add **Employee Reimbursement Info**, if desired.
- Click on [Save].



Entering the Employee Reimbursement with a Reimbursement date will not pay the employee these funds. It would need to be entered during Payroll Processing if required to be paid to the employee.

Certification		
↕ Certification	↕ Effective Date	↕ Expiration Date
Tax Preparation	10/20/2013	10/20/2015
Tax Accountant	1/15/2010	1/15/2017
FPC - Fundamental Payroll Certification	4/1/1998	4/1/2015

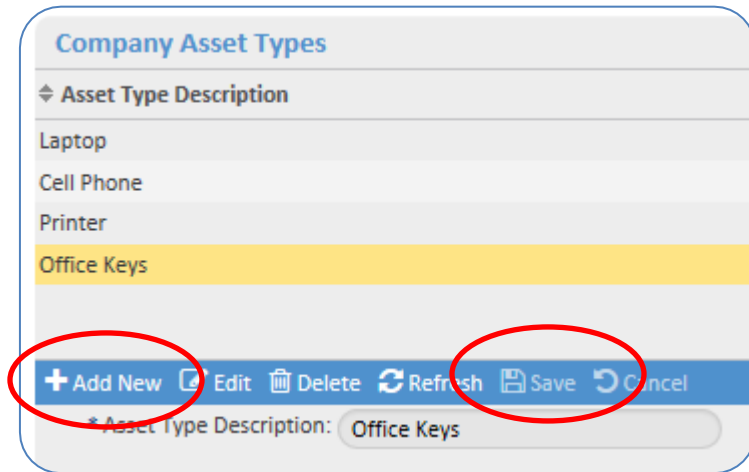
A history of all certifications for the employee will be maintained at the top of the screen.

Awards, Education, Skills, Disciplinary Offenses and Company Asset Type



Navigate to **Client Management**> **HR Management**> any of the above HR screens

What types of awards, education, skills, offenses or assets do you need to track for your employees? This list will then become a drop-down that you can select for each employee. You may add to the list at any time. Here is an example:



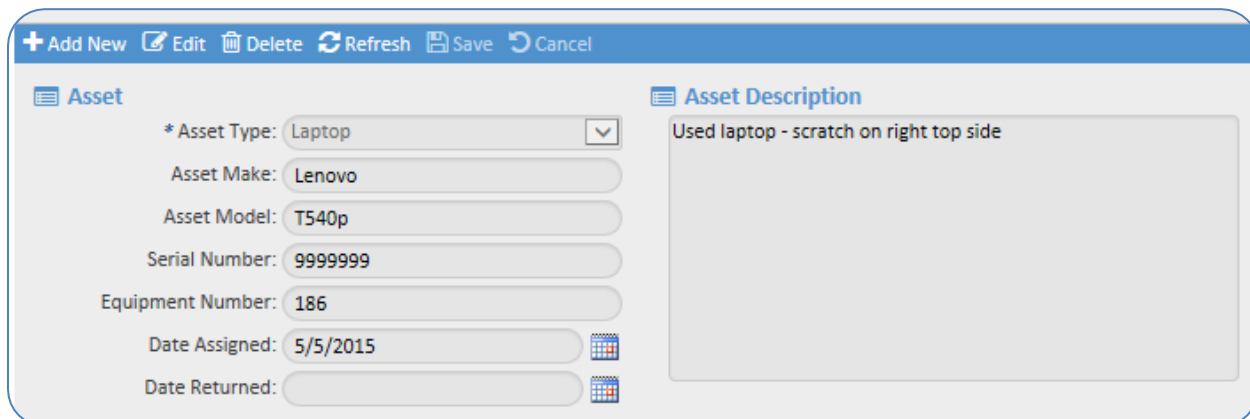
- Click on the [Add New] icon.
- Enter the description for the appropriate HR category
- Click on [Save].

Employee Awards, Education, Skills, Disciplinary Offenses and Company Asset Type



Navigate to **Employee Management**>**Human Resources**>any of the above HR screens

Add the details to the HR screen selected for the employee. Each screen will have different fields. Remember only the fields with an asterisk (*) is a required field. All other fields are at your discretion and the can contain the details you need for reporting.



Asset

* Asset Type: Laptop

Asset Make: Lenovo

Asset Model: T540p

Serial Number: 9999999

Equipment Number: 186

Date Assigned: 5/5/2015

Date Returned:

Asset Description

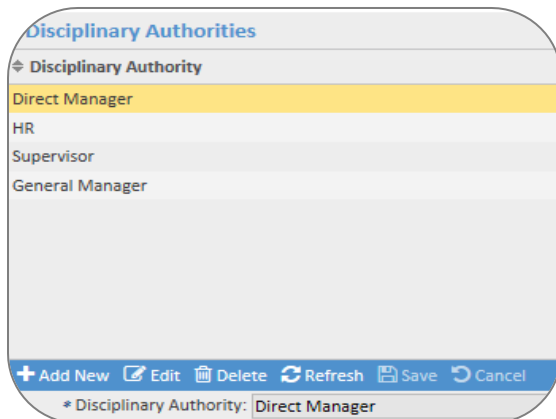
Used laptop - scratch on right top side

Disciplinary Authorities



Navigate to **Client Management>HR Management>Disciplinary Authority**

A disciplinary authority is a role within your company with the ability to enforce the rules of the organization (i.e., manager). Disciplinary authorities need to be set up prior to setting up disciplinary offenses. Adding each disciplinary authority into the system creates a drop-down that can be used within the employee's disciplinary offense record.



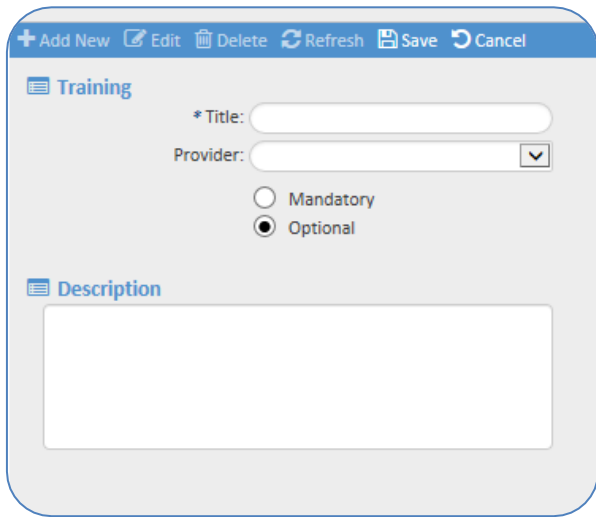
- Click on the [Add New] icon.
- Enter the **Disciplinary Authority**
- Click on [Save].

Training



Navigate to **Client Management>HR Management>Training**

Training has become a very important aspect in a company's structure. It is important to see who has attended training (possibly due to mandates); how the employee performed at the training (promotion decisions) and the costs associated with the training (actual cost or time away from work costs). iSolved training can give you reports to analyze all of these through our Training HR screens.

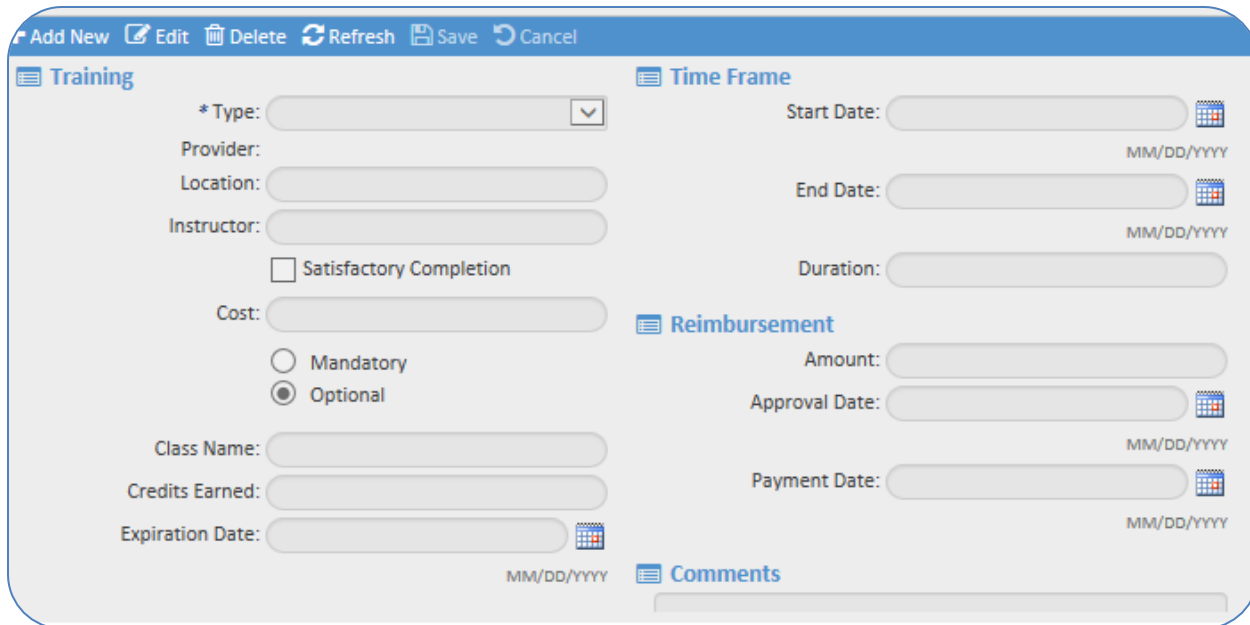


+ Add New Edit Delete Refresh Save Cancel
Training
 * Title:
 Provider:
 Mandatory
 Optional
Description



- Click on the [Add New] icon.
- Add a training class **Title**.
- Select **Provider** – Internal or External.
- Select if the class is **Mandatory** or **Optional**.
- Add **Description** (Optional).
- Click on [Save].





Navigate to **Employee Management>Human Resources>Training**



+ Add New Edit Delete Refresh Save Cancel
Training
 * Type:
 Provider:
 Location:
 Instructor:
 Satisfactory Completion
 Cost:
 Mandatory
 Optional
 Class Name:
 Credits Earned:
 Expiration Date:

Time Frame
 Start Date: 
 End Date: 
 Duration:

Reimbursement
 Amount:
 Approval Date: 
 Payment Date: 

Comments

- Click on the [Add New] icon.
- Select the **Type** from the drop-down (required).
- Add **Provider Location** (optional).
- Enter **Instructor** (optional).

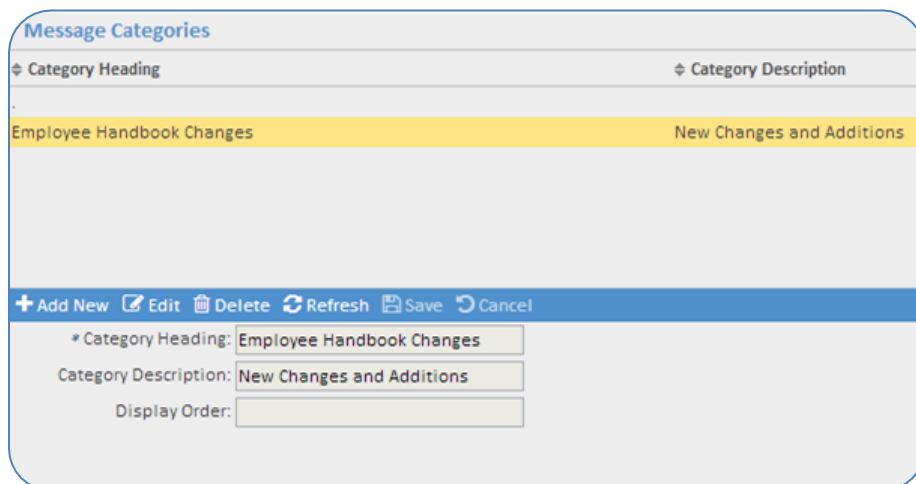
- Check **Satisfactory Completion** if class was completed using a criteria for acceptable.
- Enter **Cost** (optional)- This could be different than the reimbursement if partial reimbursement is given or if cost is internal.
- **Mandatory** or **Optional** will automatically be checked based on the selection in **Client Management** for the type selected.
- Enter **Class Name** (optional) The type may be the overall subject such as Microsoft, however the class name will give more details about the subject taken such as “Microsoft Access Development.”
- Add **Credits Earned**, if applicable.
- Enter **Expiration Date** (if training needs to be taken again at a future date).
- Enter **Timeframe** (optional).
- Enter **Duration** (optional).
- Enter **Reimbursement** information (optional).
- Click on [Save].



Entering the Employee Reimbursement with a Reimbursement date will not pay the employee these funds. It would need to be entered during Payroll Processing if required to be paid to the employee.

Message Categories

Message categories allow you to organize multiple messages into meaningful groupings. Some suggestions might be current events, employee recognition or company policies.



Category Heading	Category Description
Employee Handbook Changes	New Changes and Additions

+ Add New Edit Delete Refresh Save Cancel

* Category Heading:

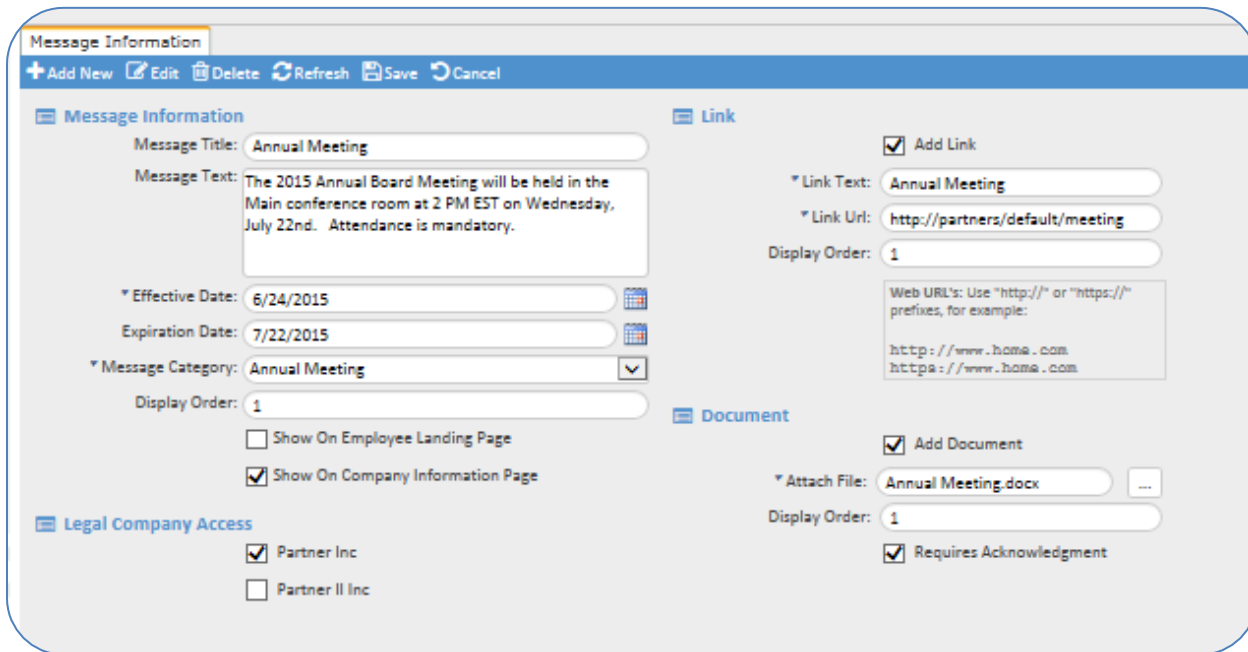
Category Description:

Display Order:

- Click on the [Add New] icon.
- Add a **Category Heading** (required).
- Add more details with the **Category Description** (optional).
- **Display order** will allow you to prioritize the categories (the order it will appear on the page).

Employee Messages

The employee message screen provides the fields to add text, links and/or documents and schedule the message to appear.



The screenshot shows a web application interface for creating an employee message. The window title is "Message Information". At the top, there are navigation buttons: "+ Add New", "Edit", "Delete", "Refresh", "Save", and "Cancel". The main content is divided into several sections:

- Message Information:** Includes fields for "Message Title" (Annual Meeting), "Message Text" (The 2015 Annual Board Meeting will be held in the Main conference room at 2 PM EST on Wednesday, July 22nd. Attendance is mandatory.), "Effective Date" (6/24/2015), "Expiration Date" (7/22/2015), "Message Category" (Annual Meeting), and "Display Order" (1). There are checkboxes for "Show On Employee Landing Page" (unchecked) and "Show On Company Information Page" (checked).
- Link:** Includes a checked "Add Link" checkbox, "Link Text" (Annual Meeting), "Link Url" (http://partners/default/meeting), and "Display Order" (1). A note below states: "Web URL's: Use 'http://' or 'https://' prefixes, for example: http://www.home.com, https://www.home.com".
- Document:** Includes a checked "Add Document" checkbox, "Attach File" (Annual Meeting.docx), "Display Order" (1), and a checked "Requires Acknowledgment" checkbox.
- Legal Company Access:** Includes checkboxes for "Partner Inc" (checked) and "Partner II Inc" (unchecked).

Message Title and Text: Add a message title and message text into these fields.

Effective Date: The effective date is a required field. The message will not appear to employees until the effective date has been reached.

Expiration Date: An expiration date is optional but can be used when a specific message should only be displayed for a certain amount of time. A message will be automatically removed once the expiration date has passed.

Message Category: Select the message category that you want this message to appear under.

Show on Employee Landing Page or Company Information Page: If you select "Show on Employee Landing" page the message will appear on the **Employee Messages** screen of ESS. You have the option to place the message on either or both pages. Suggestion: Some customers use the employee message screen for current events and topics but use the company information screen for company policies, like the company handbook.

Legal Company Access: If you have multiple legal companies, you can choose to display a message for the employees of one legal company or multiple. You must select at least one company or the message will not appear.

Adding links to a message

Link Text: Add the text you would like to appear for your employees.



Link URL: Add the URL including the http or https.

Display Order: Each message may contain more than one link. You may sequence them as needed.

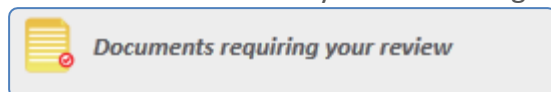
Adding documents to a message

Attach File: Select the attach file button to search for your document.

Display Order: Each message may contain multiple documents.

If you need an electronic signature from the employee verifying that they have read the document, click the **Requires Acknowledgment** box. This flag will trigger three additional actions.

1. The employee will see a message appear on the **Employee Welcome** page that alerts them and links them directly to this message.



2. The employee will see this policy title in red and a message indicating that they must read and acknowledge this document.

You are required to read and acknowledge this document

Eligibility

Once you click [Save], three other tabs appear.



The **Eligibility** tab is used to customize the employee message to a certain group of employees. By adding eligibility rules under benefits, you can now select them to be rules for the message recipients.

Select the rule that applies. In my example, only employees at the “Ohio Location” will receive this Employee Message. To verify the recipients, click on **Eligible Employees** [Report] or [Export] to view who will receive the email.

Employees Included Based on Eligibility				
Report Generated on: 6/24/2015 4:01:19 PM				
Included Eligibility Rules: (Ohio Location)				
- Following is a list of employees that will be included				
- After each employee's name is a list of Eligibility Rules that applied to that employee				
Company Name	Pay Group Name	Employee Number	Employee Name	Applicable Eligibility Rules
Partner Inc	Hourly EE	1204	Amy Leopold	Ohio Location
Partner Inc	Hourly EE	1214	Amy L Masters	Ohio Location
Partner Inc	Hourly EE	1219	Richard L Trotter	Ohio Location
Partner Inc	Hourly EE	1220	Debbie Lindsay	Ohio Location
Partner Inc	Hourly EE	1221	Mitch Lindsay	Ohio Location
Partner Inc	Hourly EE	1228	Dean Martino	Ohio Location
Partner Inc	Salary EE	1201	Jerry L Lewis	Ohio Location
Partner Inc	Salary EE	1202	Mildred C Lewis	Ohio Location
Partner Inc	Salary EE	1203	Bobby J McAlister	Ohio Location
Partner Inc	Salary EE	1218	Robert H Crandall	Ohio Location
Partner Inc	Salary EE	1222	Caprice C Bennett	Ohio Location

Links

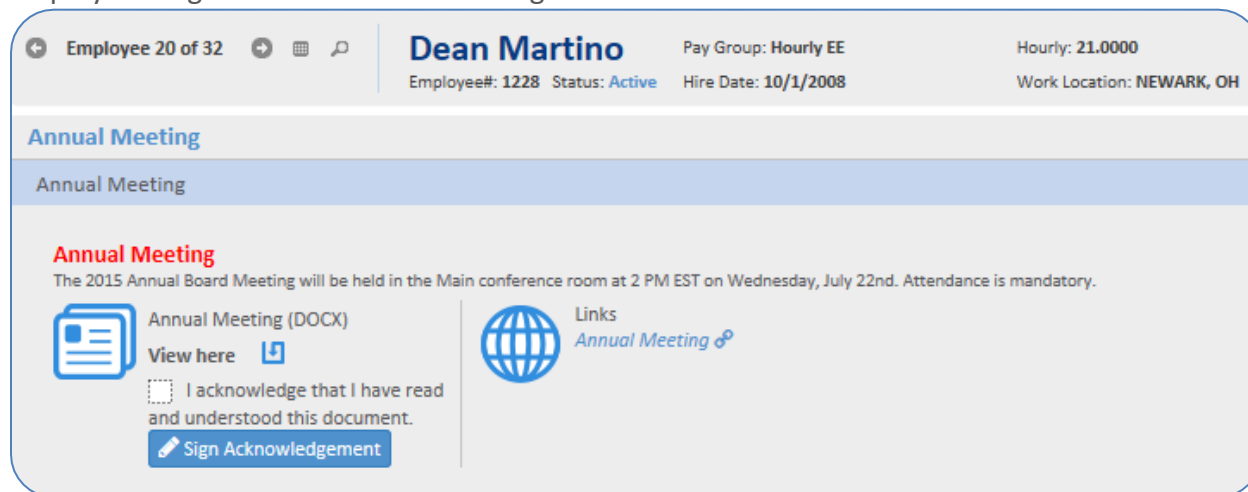
The **Links** tab will include the URL for any links attached to the message.

Documents

The **Documents** tab will include any attachments to the message. If **Requires Acknowledgement** was checked, there is also a **View Acknowledgement Report** that is available.

Employee Self Service

The message above was to appear on the **Company Information** page in **Employee Self Service** for only the employee's located in the Ohio office. This is what the message will look like for the employees eligible to receive this message.



The screenshot shows the Employee Self Service interface for Dean Martino. At the top, it displays "Employee 20 of 32" and "Dean Martino" with details: Pay Group: Hourly EE, Hourly: 21.0000, Employee#: 1228, Status: Active, Hire Date: 10/1/2008, and Work Location: NEWARK, OH. Below this is a section titled "Annual Meeting" with a sub-header "Annual Meeting". The main content area contains a document icon for "Annual Meeting (DOCX)" with a "View here" link and a "Sign Acknowledgement" button. A checkbox is present with the text "I acknowledge that I have read and understood this document." To the right, there is a globe icon and a "Links" section with a link for "Annual Meeting".

Performance Reviews

Since the setup of **Performance Reviews** is a more complicated set up with many variables, please refer to documentation specifically covering this subject. It will not be covered in this document.

Human Resources- Employee Management

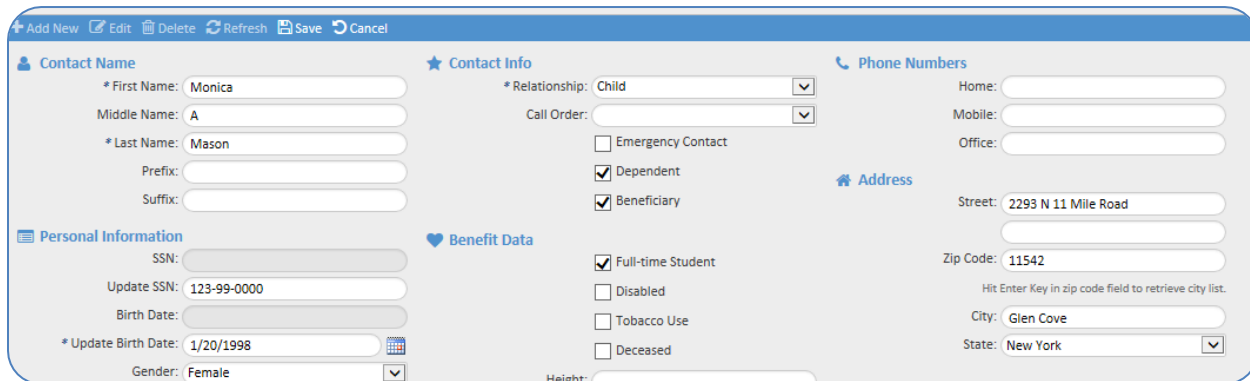
There are several screens under **Employee Management** that do not have a corresponding screen under **Client Management**. These screens do not require titles or labeling but are screens that let you add the information without prior setup. Let's review them.

Contacts



Navigate to **Employee Management>Human Resources>Employee Contacts**

Maintaining a list of employee contacts serves two important functions. The first is providing online access to the employee's emergency contact information. Employees should be encouraged to keep this information current at all times. The second function is essential for benefits and COBRA administration. This screen lists all dependent and beneficiaries to be sure that they are properly covered by the benefits selected and receive mandated COBRA notices when changes occur. Employees will be prompted with the contact screen to add or update dependents and beneficiaries before beginning open enrollment or a life event change. As an admin, you may add this information for the employees under **Employee Management, Human Resources** and **Employee Contacts**. All HR screens have corresponding reports and the data is also available in report writer, providing the ability for custom reporting.



- Click on the [Add New] icon.
- Enter **First Name** of contact (required).
- Enter the **Last Name** (required).
- Select a **Relationship** (required).
- Select a **Call Order** (optional).
- **Emergency Contact, Dependent or Beneficiary** (required for benefits, carrier feeds and COBRA services).
- **SSN and Birthdate** (required for benefits, carrier feeds and COBRA services).
- Enter any desired **Phone Numbers** (optional).
- **Benefit Data** (may be required for some Life Event changes for COBRA services).
- The **Address** field will default to the employee address, but can be changed.
 - For customers using the Benefits or COBRA Service: o Enter a complete address (address, city, state, ZIP) if different from the employee's address. No partial addresses, please.
- Click on the [Save] icon.




All dependent and beneficiaries must be added as contacts and designated with the appropriate check box for benefits, carrier feeds and COBRA services. Remember to add the SSN and Birthdate if required for any of these services.

Multiple contacts can be entered for each employee, and a listing of each will be available at the top of the page for reference.

Prior Employment

The prior employment screen is used to catalog the information from an Employee’s resume. This information could assist managers in making job changes, promotions or even performance evaluation based on past experience.



Navigate to **Employee Management>Human Resources>Prior Employment**

+ Add New
✎ Edit
🗑 Delete
🔄 Refresh
💾 Save
↶ Cancel

Job Info

* Employer:

* Job Title:

* Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

Salary Info

Annual
 Hourly

Ending Salary:

Job Description

Additional Info

Change Reason:

Manager/Reference:

Location:

Comments

- Enter **Employer** (required).
- Enter **Job Title** (required).
- Enter **Start Date** (required).
- Enter **End Date** (optional).
- Enter **Salary Info; Job Description; Additional Info** and **Comments** (when available).
- Click on the [Save] icon.

All **Prior Employment** records will be shown in a list at the top of the screen.

Prior Employment				
↕ Employer	↕ Job Title	↕ Start Date	↕ End Date	↕ Ending Salary
Ford Motor Company	Auditor	2/13/1994	6/1/1999	\$32,500.00
Dell Computers	Auditing Manager	6/15/1999	10/1/2003	\$35,900.00

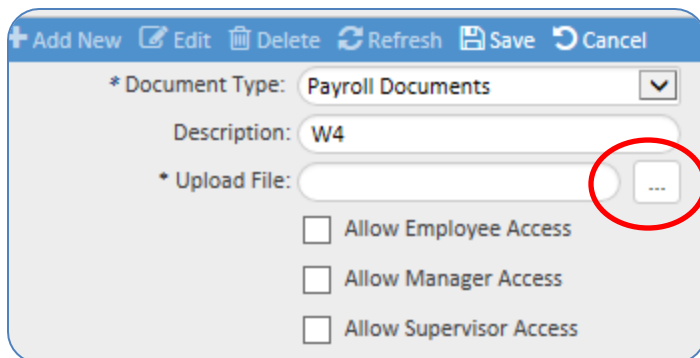
Employee Documents

The iSolved **Employee Documents** screen provides the ability to store HR and Payroll related documents online that were previously held in a filing cabinet. Storing documents online allows the employees, managers and admin access to documents while maintaining the appropriate level of security. No more digging through filing cabinets or scanning and sending information to managers.



Navigate to **Employee Management>Human Resources>Employee Documents**

How does your company store important employee documents? Add each important document in the employee document area and the system will keep a record as well as a copy of the document for as long as you may need it. You may add or delete documents from this list at any time.



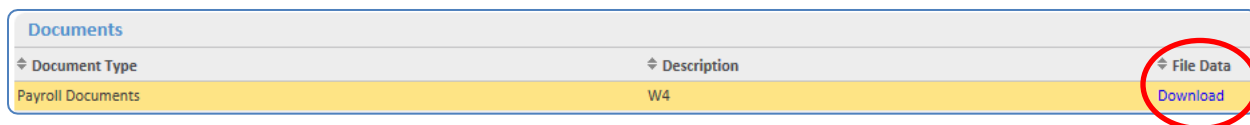
The screenshot shows a form with a blue header containing buttons for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. The form fields include: '* Document Type:' with a dropdown menu set to 'Payroll Documents'; 'Description:' with the text 'W4'; '* Upload File:' with a text box and a red circle around the file selection icon; and three checkboxes for 'Allow Employee Access', 'Allow Manager Access', and 'Allow Supervisor Access'.

- Click on the [Add New] icon.
- Select the **Document Type**.
- Enter **Description** (optional but will appear on reports).
- Click [Upload File] box – attach document
- Click on [Save].

Select who should have access to the document. For each document, you can decide if it is appropriate for the employee, manager or supervisor to see this document through **Employee Self Service**.

A list of all employee documents will be maintained at the top of the screen.

In order to view the file, log into Employee Self Service>Documents and click “Download” to view the file.



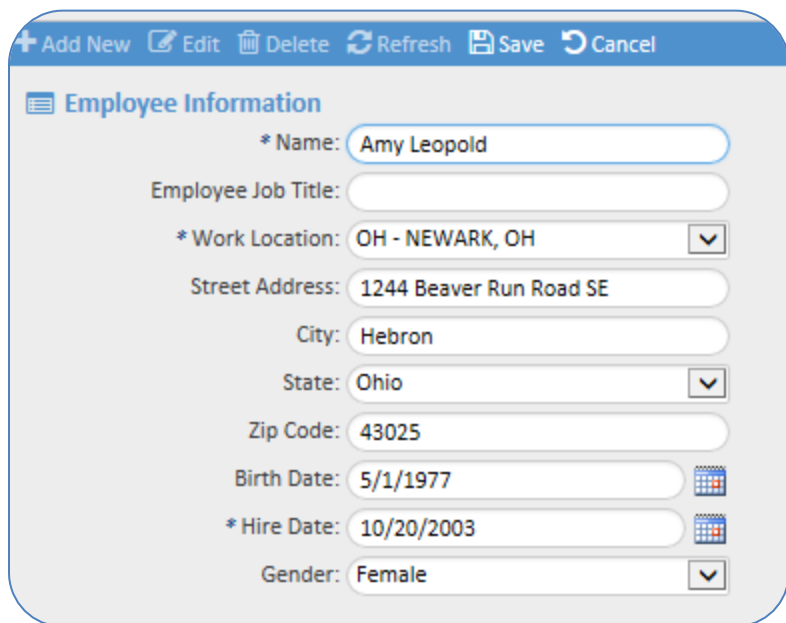
Document Type	Description	File Data
Payroll Documents	W4	Download

OSHA Incidents



Navigate to **Employee Management>Human Resources>OSHA Incidents**

To get started, select an employee from the **Employee Summary** who sustained an injury on the job.



Employee Information

* Name: Amy Leopold

Employee Job Title:

* Work Location: OH - NEWARK, OH

Street Address: 1244 Beaver Run Road SE

City: Hebron

State: Ohio

Zip Code: 43025

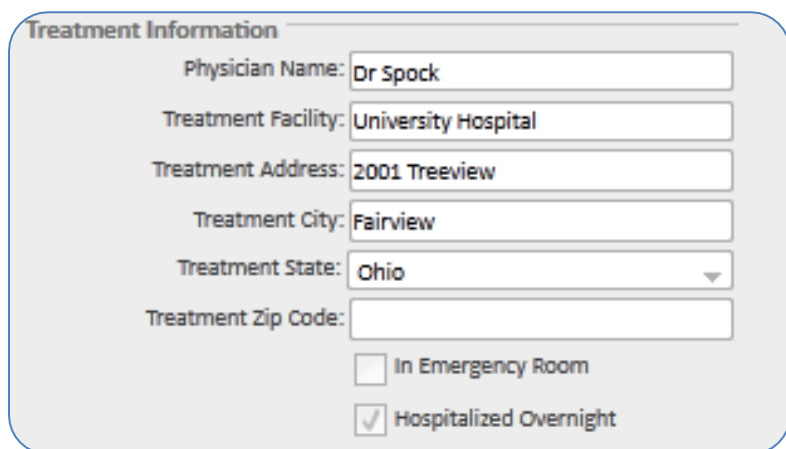
Birth Date: 5/1/1977

* Hire Date: 10/20/2003

Gender: Female

Employee information

- All employee information will auto fill; you may change populated information if needed.
- Select the **Work Location** (if different than what is listed).



Treatment Information

Physician Name: Dr Spock

Treatment Facility: University Hospital

Treatment Address: 2001 Treeview

Treatment City: Fairview

Treatment State: Ohio

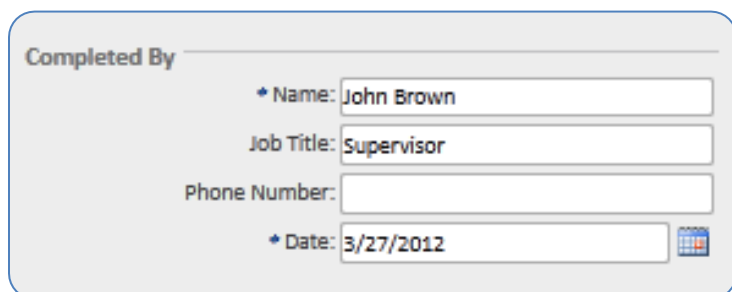
Treatment Zip Code:

In Emergency Room

Hospitalized Overnight

Treatment Information

- This area is optional. Complete if any of this information is provided.



Completed By

* Name: John Brown

Job Title: Supervisor

Phone Number:

* Date: 3/27/2012

Completed By

- Enter the **Name** of the person that is completing the report (required).
- Enter the **Job Title** of that person.
- Enter **Phone Number** of that person.
- Enter **Date** completed (required).

Case Information

• Case Number:

• OSHA Incident Type: ▼

Is Privacy Case

• Incident Date: 📅

Time Employee Began Work: ▼

Time Of Event: ▼

• Incident Location:

• Incident Desc:

Case information

- Add **Case Number** (required).
- Choose the **OSHA Incident Type** from the drop-down (required).
- Is **Privacy Case** (optional).
- Fill in the **Incident Date** (required).
- Select the **Time employee Began Work** (optional).
- Select the **Time of Event** (optional).
- Enter the **Incident Location** (required).
- Enter an **Incident Desc** (required).

Incident Details

Pre-Incident Event:

Injury/Illness Event:

Injury/Illness Desc:

Object/Substance Desc:

• Days Transferred/Restr:

• Days Away From Work:

Date Of Death: 📅

Incident details

- Enter a **Pre-incident Event** (optional).
- Enter any **Injury/Illness Event** (optional).
- Enter any **Injury/Illness Desc** (optional).
- Enter any **Object/Substance Desc** (optional).
- Enter any **Days Transferred/Restr** (restricted).
- Enter any **Days Away From Work**.
- Select a **Date of Death** (optional).
- Click on the [Save] icon.

Client Reports

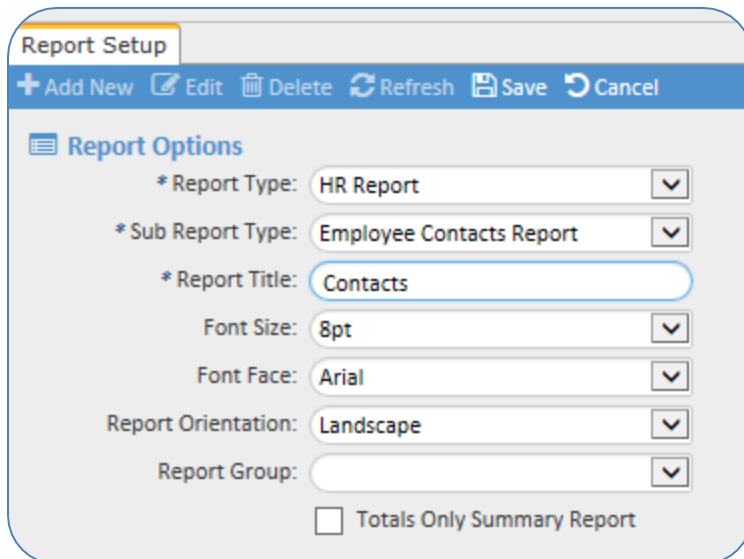
Each HR section has a corresponding report. The reports usually start with the word “Employee”. The reports are date range reports so you are able to see the history of an HR event.

Here are some of the reports.

Employee Award History Report	Date Range
Employee Birth Age List	Date Range
Employee Census	By Payroll Run
Employee Census Export	By Payroll Run
Employee Certification History Report	Date Range
Employee Company Assets	Date Range
Employee Comparison Ratio Report	As Of Date
Employee Disciplinary Report	As Of Date
Employee Documents On File	Date Range
Employee Education History Report	Date Range

Report Writer

Report Writer has a **Report Type** called “HR Report.” After selecting the **Report Type**, the **Sub Report Type** drop down will contain a list of all HR screens and more.



The screenshot shows the 'Report Setup' dialog box with the following options:

- Report Options**
 - * Report Type: HR Report
 - * Sub Report Type: Employee Contacts Report
 - * Report Title: Contacts
 - Font Size: 8pt
 - Font Face: Arial
 - Report Orientation: Landscape
 - Report Group: (empty)
 - Totals Only Summary Report

Once you select the report and sub report type, the add and edit columns will contain selections from that HR screen.

