

Pay-Net Online

Chapter 2

HUMAN RESOURCES

Introduction

The module requires the setup of HR Codes in the Company Admin > HR Setup section of the system. These user defined codes allow for the proper storage of information in the way the system was intended.

DOCUMENT STORAGE

Located in most of the tabs of the Human Resources Module is the access to store documents. The attachment can be Coded with a unique short description and then Notes entered as to what the document contains. Next, browse for the document on the computer accessing the site by clicking the Select button. Then SAVE to begin the importing of the document. Once the document is fully uploaded, it will appear in the documents window where you can view, edit, or delete it.

Supported document types are: pdf, xls, doc, txt, pps, csv, tsv, jpeg, bmp, tif, gif, png.

File Upload

Information

Code: Rev082011

Notes: Signed performance appraisal, Aug 5, 2011.

Attached File: Load/Update [Select]

[SAVE] [CANCEL]



Review Details | Notes | Documents

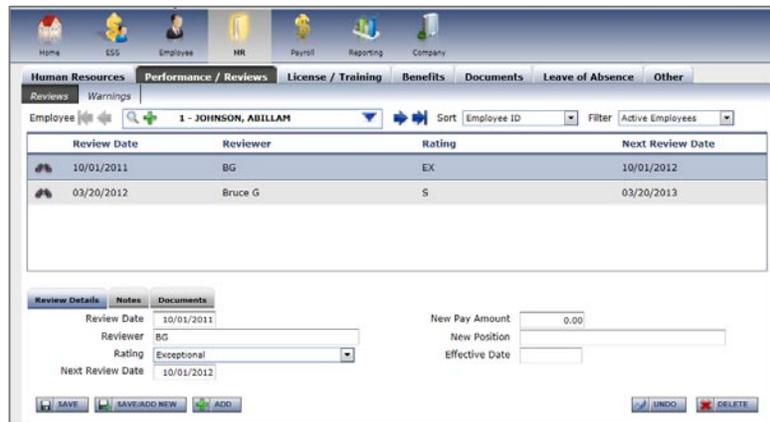
Code	Category	Notes
Rev082011	Review	Signed performance appraisal, Aug 5, 2011.

[ADD DOCUMENT]

2.1 Performance / Reviews

2.1.1 Reviews

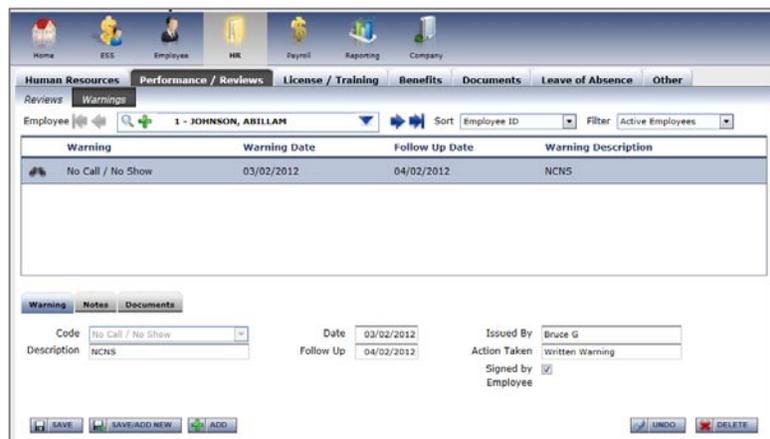
The Reviews sub-tab stores information regarding performance appraisals and offers several reportable fields to store data. The Review Details portion of the screen stores key information like when the review occurred, who gave the review, how the employee scored, when the next review should occur, and any new rate or position information. The Notes portion allows for the storage of comments made by the reviewer and the employee. *Document storage is available on this sub-tab.*



<Figure 2.1.A>

2.1.2 Warnings

The Warnings sub-tab stores information regarding employee disciplinary write-ups and offers several reportable fields to store data. The Warning portion of the screen sets the type or warning the employee received, a brief description of the event, the date the issue occurred and when it will be followed up. The person issuing the warning can also be tracked as well as the type of action taken and if the warning was written, the confirmation that it was signed by the employee. *Document storage is available on this sub-tab.*



<Figure 2.1.B>

2.2 License / Training

2.2.1 Certification

The Certification sub-tab stores information regarding accreditations the employee has earned and offers several reportable fields to store data. The Certification portion of the screen stores key information like the type of certification, a brief description, the unique identifier of the award, when it was earned and when it will expire. Also tracked is if the certification was paid for by the employer or employee. The Notes portion allows for the storage of comments about the certification. *Document storage is available on this sub-tab.*

Certification Code	Effective Date	Expiration Date	Certificate #
Certified Payroll Professional	04/01/2009	04/01/2014	12-RW09P

Code: Certified Payroll Professional
Description: CPP
Certificate #: 12-RW09P

Effective: 04/01/2009
Expires: 04/01/2014

Company Paid: 350.00
Employee Paid: 0.00
Reimbursed?

<Figure 2.2.A>

2.2.2 Education

The Education sub-tab stores information regarding higher learning the employee has completed and offers several reportable fields to store data. The screen stores key information such as the School attended, the course of study and to what level the employee completed their studies. There are also fields for the dates of attendance, GPA, and any additional commendations. The Notes portion allows for the storage of comments about the education.

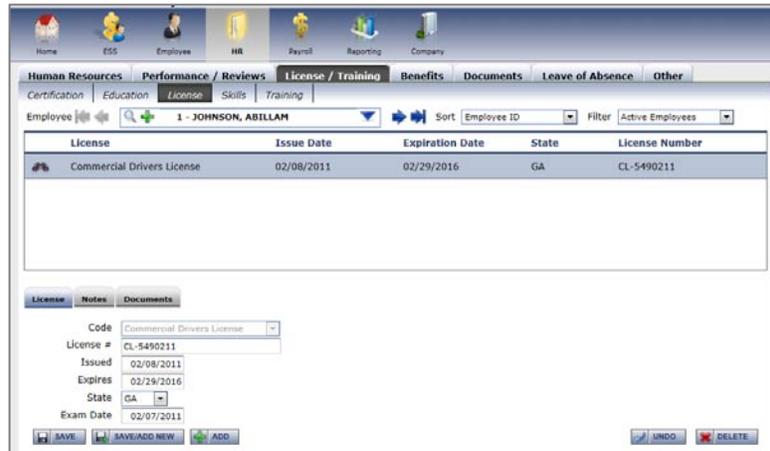
School	Major	Degree	Years	GPA
Univ of FL	Accounting	B	2001-2005	3.50

School: Univ of FL
Major: Accounting
Degree: B
Years Attended: 2001-2005
Classes:
GPA: 3.50
Awards:
Notes:

<Figure 2.2.B>

2.2.3 License

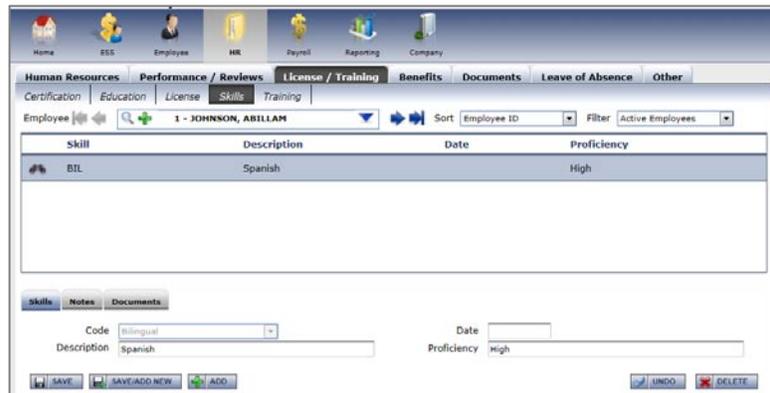
The License sub-tab stores information regarding licenses the employee has earned and offers several reportable fields to store data. The License portion of the screen stores key information like the type of license, the unique identifier of the license, when it was issued and will expire, the State of issuance and when the employee took the Exam to earn the license. The Notes portion allows for the storage of comments about the license. *Document storage is available on this sub-tab.*



<Figure 2.2.C>

2.2.4 Skills

The Skills sub-tab stores information regarding talents the employee has and offers several reportable fields to store data. The screen stores key information such as the type of skill the employee has exhibited, a brief description, the date the skill was mastered and details regarding the Proficiency shown while displaying the skill.

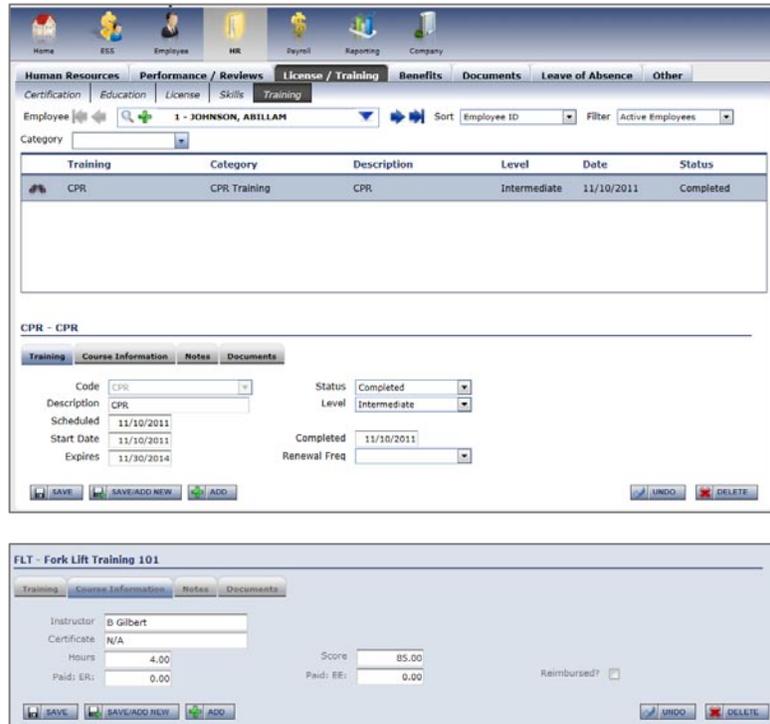


<Figure 2.2.D>

2.2.5 Training

The Training sub-tab stores information regarding courses the employee has completed and offers several reportable fields to store data. Trainings attended by the employee can be broken into categories and a pull-down menu is available at the top of the screen to select the appropriate category (Sales, Service, etc.). The Training portion of the screen stores key information about the course, a brief description, the Scheduled training date, when the course started and when the materials will expire. Also found here is the status of the employee's

completion, the level at which they have been taught, the actual date of completion by the employee and how often the employee should attend the session. The Course Information area stores information regarding the Instructor name, whether or not a Certificate was issued, how many Hours the employee attended, the Score received, and how much the employee and employer paid for the course. The Notes portion allows for the storage of comments about the training course. *Document storage is available on this sub-tab.*



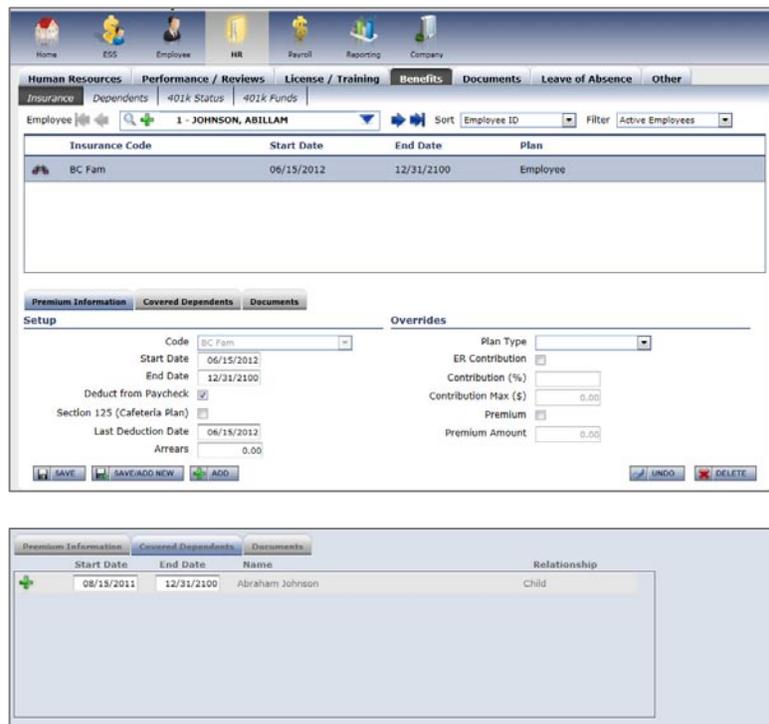
<Figure 2.2.E>

2.3 Benefits

2.3.1 Insurance

The Insurance sub-tab stores information about the employee’s participation in an insurance/benefit offering and offers several reportable fields to store data. The policy to which the employee is participating populates the left-hand side of the screen except for the Start Date and End Date which should be entered appropriately. The policy info pulls from the HR Setup area of the application. The Overrides section on the right-hand side of the screen allows for overriding the company policy specific to the selected employee. The type of benefit, and employee and employer contributions can be overridden. The Notes portion allows for the storage of comments about the benefit election. *Document storage is available on this sub-tab.*

** The Covered Dependents area should be populated to ensure the proper calculation of the employee and employer contributions. Those being covered should first be set up on the Dependents sub-tab also found under the Benefits tab (next sub-tab in the document; 3.3.2). **



<Figure 2.3.A>

2.3.2 Dependents

The Dependents sub-tab stores all demographic, contact, and relative information for family members of the employee. Beyond name and contact information, there are pre-set options for the relation of the person, Gender, SSN, Birth Date, whether they smoke. The information stored here can be used solely for reporting or informational purposes but also can be utilized in setting up the Insurance sub-tab.

Last Name	First Name	DOB	Relationship	Phone
Johnson	Jack	09/22/1985	Child	
Johnson	Lisa	06/07/1958	Spouse	

<Figure 2.3.B>

2.3.3 401k Status

The 401k Status sub-tab stores all census information that may be needed by a retirement plan administrator, such as the employee's Status of participation in the plan, Eligibility Date for contributing, deferral and company match info, and whether they are Highly Compensated and if they are the Owner or Related to Owner.

*** Information entered on the screen is for reporting purposed only and in no way affects paycheck calculation. ***

<Figure 2.3.C>

2.3.4 401k Funds

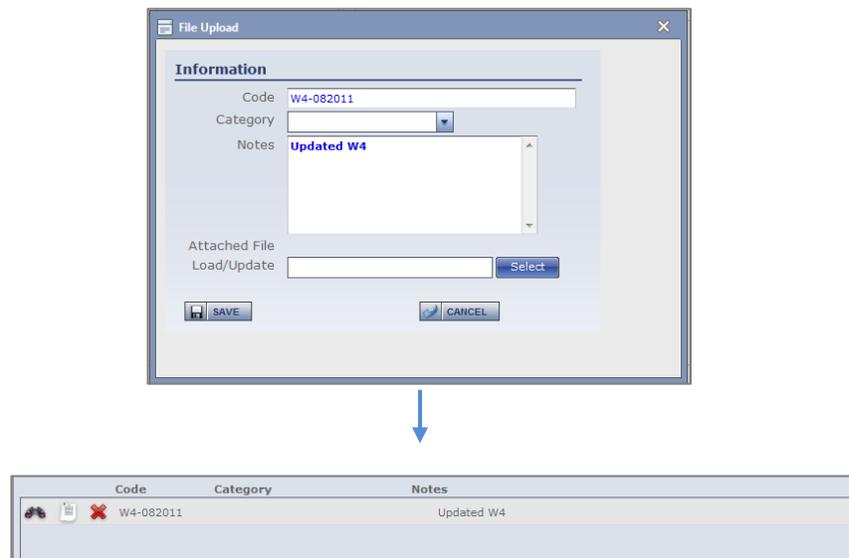
The 401k Funds sub-tab stores fund allocations made by the employee when setting up their 401k plan and investment strategies of their funds.

*** Information entered on the screen is for reporting purposed only and in no way affects paycheck calculation. ***

2.4 Documents

Documents that are not able to be categorized into one of the Human Resources sub-tabs can be stored here. Often times, these are documents related to employment verification and tax information. The document/attachment can be Coded with a unique short description and then Notes entered as to what the document contains. Next, browse for the document on the computer accessing the site by clicking the Select button. Then SAVE to begin the importing of the document. Once the document is fully uploaded, it will appear in the documents window where you can view, edit, or delete it.

Supported document types are: pdf, xls, doc, txt, pps, csv, tsv, jpeg, bmp, tif, gif, png.

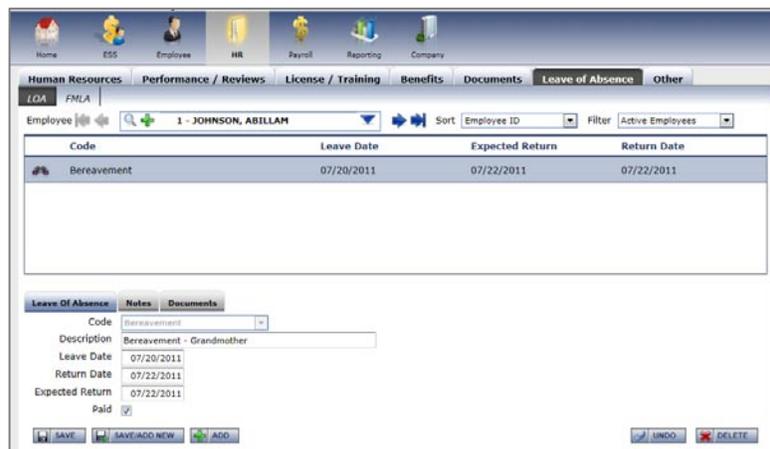


<Figure 2.4.A>

2.5 Leave of Absence

2.5.1 LOA

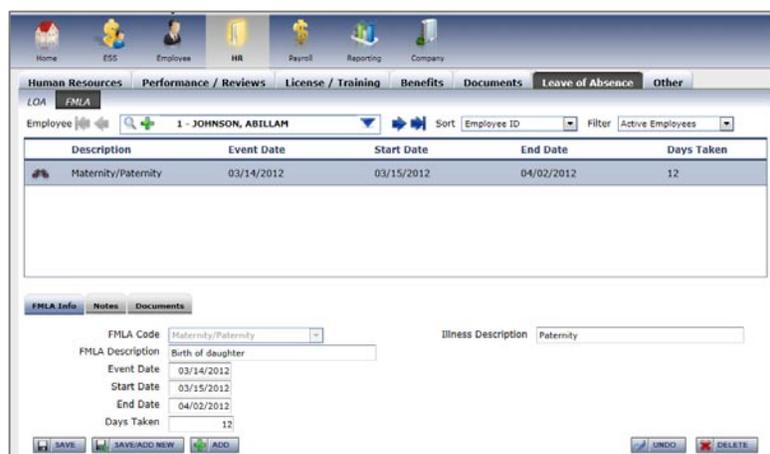
The LOA (Leave of Absence) sub-tab stores information regarding extended periods of absence by the employee and offers several reportable fields to store data. The Leave of Absence portion of the screen stores key information like the type of leave, brief description, when the leave started, when it ended, an Expected Return date, and If the leave was Paid. The Notes portion allows for the storage of further details of the leave. *Document storage is available on this sub-tab.*



<Figure 2.5.A>

2.5.2 FMLA

The FMLA (Family Medical Leave Act) sub-tab stores information regarding absences by the employee for family issues and offers several reportable fields to store data. The FMLA Info portion of the screen stores key information like the type of leave, brief description, the date of the event causing the leave, when the leave started, when it ended, the number of Days Taken, and the Illness Description. The Notes portion allows for the storage of further details of the leave. *Document storage is available on this sub-tab.*



2.6 Other

2.6.1 Company Assets

The Company Assets sub-tab stores information regarding items issued to the employee as part of their job and offers several reportable fields to store data. The Company Assets portion of the screen stores key information like the item issued, Model, Serial Number, when it was issued/returned, and the value of the item. The Notes portion allows for the storage of further details about the item. This area is designed to log items for retrieval should the employee ever terminate/be terminated. *Document storage is available on this sub-tab.*

Asset Code	Date Received	Model	Serial Number
Company Lap Top	02/09/2011	Dell Inspiron 350	1XC459CLDP

Company Assets | Notes | Documents

Asset Code: Company Lap Top
Model: Dell Inspiron 350
Serial Number: 1XC459CLDP
Receipt Date: 02/09/2011
Return Date:
Value: 475.00

SAVE SAVE/ADD NEW ADD UNDO DELETE

<Figure 2.6.A>

2.6.2 Prior Employer

The Prior Employer sub-tab stores information regarding the employee's positions with previous employers. Included on the screen are fields to store employment dates, types of employment and prior pay data.

2.6.3 OSHA

The OSHA (Occupational Safety & Health Administration) sub-tab stores information regarding accidents on the job and offers several reportable fields to store data. The OSHA portion of the screen stores key information like the type of accident, the date when it occurred, applicable Case #, type of injury, brief description, result of the accident, what the employee was performing to cause the injury, the area(s) of the body affected by the injury, the number of Days Missed or Restricted, and where it happened. The Care Info portion tracks information about the treating physician and the hospital where the employee was taken to be cared for. *Document storage is available on this sub-tab.*

Human Resources | Performance / Reviews | License / Training | Benefits | Documents | Leave of Absence | Other

Company Assets | Prior Employer | OSHA | Events

Employee: 1 - JOHNSON, ABILLIAM | Sort: Employee ID | Filter: Active Employees

Case	Location	Date	Type
123856	Warehouse	12/11/2009	ChemSpill

OSHA | Care Info | Documents

Date: 12/11/2009

Case #: 123856

Injury Type: Chemical Spill

Injury Category: Respiratory Condition

Injury Desc: Inhaled toxic chemicals; burned throat

Injury Result: Restriction

Activity: N/A

Body Part: N/A

Object Causing Injury: Chlorine

Days Missed: 0

Days Restricted: 5

Location: Warehouse

On Premises?

SAVE | SAVE+ADD NEW | ADD | UNDO | DELETE

Human Resources | Performance / Reviews | License / Training | Benefits | Documents | Leave of Absence | Other

Company Assets | Prior Employer | OSHA | Events

Employee: 1 - JOHNSON, ABILLIAM | Sort: Employee ID | Filter: Active Employees

Case	Location	Date	Type
123856	Warehouse	12/11/2009	ChemSpill

OSHA | Care Info | Documents

Physician Information

Name: Dr John Smith

Address: 123 Main Street

City: Atlanta

State: GA | Zip: 30328

Phone: 111-222-3333

Hospital Information

Name: Emergency Hospital

Address: 123 Main Street

City: Atlanta

State: GA | Zip: 30324

Phone: 111-222-4444

SAVE | SAVE+ADD NEW | ADD | UNDO | DELETE

<Figure 2.6.B>

2.6.4 Events

The Events sub-tab stores information regarding special events the employee participated in and offers several reportable fields to store data. The Event portion of the screen stores the type of event, brief description, and date of the events occurrence. The Notes portion allows for the storage of further details about the event.

Human Resources | Performance / Reviews | License / Training | Benefits | Documents | Leave of Absence | Other

Company Assets | Prior Employer | OSHA | Events

Employee: 1 - JOHNSON, ABILLIAM | Sort: Employee ID | Filter: Active Employees

Code	Description	Event Date	Next Date
EmpMonth	EDM	06/15/2011	

Event | Notes

Event: Employee of the month

Description: EDM

Date: 06/15/2011

Next Date:

User1 String:

User2 String:

User1 Date:

User2 Date:

User1 Double: 0.00

User2 Double: 0.00

SAVE | SAVE+ADD NEW | ADD | UNDO | DELETE