info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Fall 2018

Top ten ways to maximize value on your info:HR investment

The orange buses are back, there's more traffic, and the children are being shuffled off in their new outfits. That can only mean the start of school and the "end" of summer. I hope everyone had a wonderful summer filled with your favorite activities and, for some of us, surviving the sauna-like temperatures. Given that everyone is getting back from vacations and turning their attention to work priorities, I thought an appropriate column would be my take on "A Top 10 List for Maximizing the Value and Return You Realize From Your Use of info:HR." This is only my list based on what I've seen over the years meeting and talking to you, our clients. As with many things, you get out of something what you put into it. Ok so here goes!

1. **Training, training, and more training.** This only makes sense and applies not only to new clients but throughout your use of info:HR, i.e. refresher training. Barbara Chicago and the staff behind her would be happy to discuss your training needs and put together a training plan suited to your requirements.
2. **Use our Support and Helpdesk.** Our helpdesk is staffed with experts with an average tenure of over 12 years experience with us! They've seen almost everything. And what's better is we strive to get you speaking with one of them as quickly as possible. It drives me crazy when I call a support line and get stuck in an auto-attendant service.
3. **Meet with us.** Phone contact is fine but nothing replaces good old face-to-face contact. We've travelled most of Canada to meet with our clients. So many times I hear during these meetings "Well, I didn't know I could do that!" And we'll buy the coffee and lunch too!
4. **Speak with other info:HR clients.** We are more than happy to connect you with clients who experienced similar challenges, requirements, or software environments as you. Often we can put you in contact with a company in a similar business.
5. **Attend our webinars.** Did you know they exist? Did you know they are free? They are also quick, and focus on a variety of relevant topics. You can find the schedule and topics on the client section of our website (and also in this client newsletter).
6. **Take a tour of the client section of our website.** There's lots of good stuff there. If you don't know your serial number + password combo, email support@infohr.com and we'll provide it (sorry, for security reasons we can't give it out over the phone).
7. **Get to know the Documentation and Training Guides.** Yes, it's all on the client section of the website.
8. **Ask to attend a private one-on-one with Jerry Rowland.** Even if you don't have specific issues to discuss with Jerry, I guarantee you will get good value from a 45–60 minute chat with our Founder and VP, Product Development. And he would love it: Jerry loves hearing from our clients. At the very least, he'll update you on the weather in Palm Springs!
9. **Be aware of our Customization Services.** Most HRIS solutions are off-the shelf; if there is something you'd like that is unique to your business, they often won't be able to address it until the next release (or not at all). Many clients have benefited significantly from taking advantage of our Customization Services.
10. **Not completely satisfied with something?** Please, please call us and let us know. We will do our very best to address any issues you may have. It's in both of our interests that you are the best possible user you can be.

I hope that was helpful and if not, read on: there's always lots of good information in our newsletter. Fall is my favorite season and I wish all of you a great Fall, personally and professionally!

Andy Staniewski

IN THIS ISSUE

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

Cloud-hosted HRIS solution implemented at Northumberland Family Health Team

Cobourg-based Northumberland Family Health Team (NFHT), along with 20 affiliated physicians, serves over 26,000 patients in West Northumberland, Ontario.

The team is made up of a wide variety of regulated healthcare professionals who work interprofessionally in collaboration with the family physicians to provide patient-centred primary care. Affiliated medical clinics include Cobourg Clinic, Cobourg Health Centre, and Cobourg Medical Centre.

Paper-based HR records management for the 27-person team working at multiple clinic locations was becoming challenging and time consuming for the NFHT administrative group. It was determined that the solution lay in finding software that could be relied on to effectively automate routine human resource tasks.

"Not only did we have everyone's data in spreadsheets, we were also using paper-based time-off requests," says Laurel Savoy, Northumberland Family Health Team Executive Director. "It wasn't an efficient process for managing requests and updates, especially when you have staff at multiple clinic locations."

Northumberland Family Health Team Executive Director Laurel Savoy

After conducting some research into available options and asking peers for references, NFHT decided to implement the info:HR Human Resources Information System (HRIS) from HR Systems Strategies Inc. The team was reassured by the software provider's experience with similar-sized healthcare delivery organizations—including North York Family Health Team, Windsor-Essex County Health Unit, and East Elgin Family Health Team—and familiarity with their needs and requirements. Initial results are positive.

> "Introducing new software has reduced paperwork, saved time, and improved the overall workflow for the team."

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In addition to info:HR, NFHT opted to include the Employee/Manager Self-Serve (ESS) module, which enables employees to submit their time-off requests electronically in real time as well as being able to update their own information as required. NFHT also invested in a worry-free hosting solution: their data will reside in HR Systems Strategies' secure cloud-based hosting service. Cloud-based hosting relieves administrative staff of the additional burden of managing servers and backups, and enables employees to gain access to their information from wherever they are.

"We are very happy to welcome Northumberland Family Health Team to the info:HR user community," says HRSS President Andy Staniewski. "And they can rest easy knowing their employee data is securely managed in our subscription hosting service."

Laurel and her team benefited from the pace of the training provided by the info:HR software implementation team and the level of support provided during the implementation.

Because training modules are separated into small, manageable units, the custom info:HR training scheduled leaves time for the team to absorb new information and experiment with the software between training sessions. Any questions that arise can be answered in the following training session.

After training concludes, the NFHT team will be able to rely on a responsive, experienced info:HR support team member who understands both the software and the multiple details of human resources administration.

"It's reassuring to know that we can pick up the phone and speak to a tech support person who understands our needs," says Laurel. "Working with the info:HR team has been a very positive experience."

Tips and techniques: Frequently Asked Questions

by Hemu Mistry, Manager, Application Development

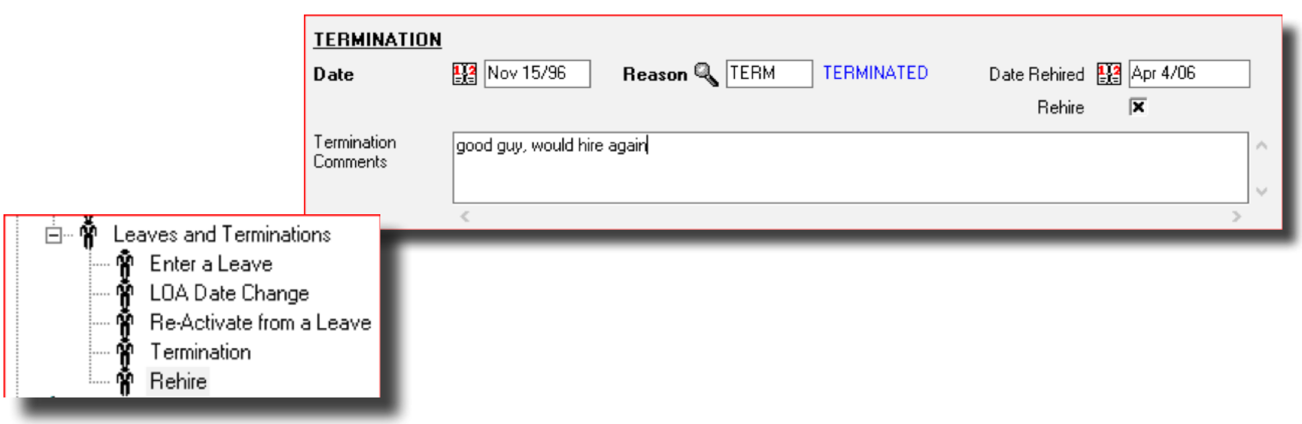
Hello everyone!! I hope you all had a wonderful summer. Welcome to the FAQ section of the newsletter. In this edition, I am going to talk about some of the questions that we get asked here quite frequently.

Incorrectly terminating an employee in info:HR

If you happen to terminate the wrong employee in info:HR, do not worry—we can revert this transaction. You will first need to rehire the employee back, using the **Rehire screen** located under the **Employee menu \ Leaves and Terminations**. On this screen you do not need to enter anything as what is necessary has already been populated. Simply check the "**Delete Termination Record**" checkbox and click on the "**Save**" ( ) icon on the toolbar. This process will rehire the employee back into the Active Employee list and will delete the termination record of the employee so there will be no history of this termination transaction. If for some reason you do not wish to delete the termination record while rehiring and want to make sure the employee is rehired correctly first, then do not check the "**Delete Termination Record**" checkbox. Simply click the "Save" ( ) icon on the toolbar to rehire the employee. Once the rehire process is complete and you have verified the employee's record in the Active Employee List, you can then delete the termination record. That's described in the next section.

Deleting a termination record

To delete the termination record of an employee or to remove older termination records, click on the "**Find Terminated Employee**" menu item and select the Termination record you wish to delete. Don't be surprised if you see multiple termination records for the same employee; it's not unusual, especially in the case of seasonal or casual employees who may come and go several times. If there are multiple termination records, select the one you want to delete and go to the **Status/Dates screen** located under the **Employee menu \ Basic Information**. Verify this is the right termination record to delete by checking the Termination Date. Then go to the **Employee Demographics screen** and click on the "**Delete**" ( ) icon on the toolbar to delete the termination record. At the prompt to confirm the deletion of the termination record, click on the "**Yes**" button. The termination record will be deleted.



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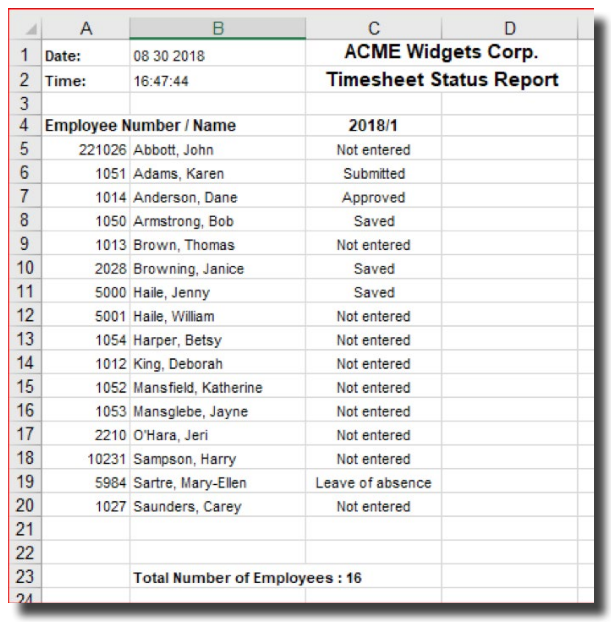
Timesheet Status Report

For those using the Timesheet web module where employees enter time sheets by pay period and you want to check the status of the timesheet completion for different pay periods, i.e. if they have been saved, submitted, approved, etc., use the **Timesheet Status report** located under the **Reports menu \ Attendance and Entitlements**. The report selection criteria on this report screen gives you the option to generate a report for various statuses of the Timesheet and for the pay period range. This way you can find out if Timesheets are ready to be exported to your Payroll Interface (if you have one), if all employee Timesheets are approved, or if the Pay Period(s) can be closed.



	A	B	C	D
1	Date:	08 30 2018	ACME Widgets Corp.	
2	Time:	16:47:44	Timesheet Status Report	
3				
4	Employee Number / Name		2018/1	
5	221026	Abbott, John	Not entered	
6	1051	Adams, Karen	Submitted	
7	1014	Anderson, Dane	Approved	
8	1050	Armstrong, Bob	Saved	
9	1013	Brown, Thomas	Not entered	
10	2028	Browning, Janice	Saved	
11	5000	Haile, Jenny	Saved	
12	5001	Haile, William	Not entered	
13	1054	Harper, Betsy	Not entered	
14	1012	King, Deborah	Not entered	
15	1052	Mansfield, Katherine	Not entered	
16	1053	Mansglebe, Jayne	Not entered	
17	2210	O'Hara, Jeri	Not entered	
18	10231	Sampson, Harry	Not entered	
19	5984	Sartre, Mary-Ellen	Leave of absence	
20	1027	Saunders, Carey	Not entered	
21				
22				
23		Total Number of Employees : 16		

I hope this section has been informative. If you have any questions or comments, or need assistance with any of the functionality in info:HR, ESS, or Timesheet, please do not hesitate to call our support line at 1-800-567-4254 or 416-599-4747. See you all in our next issue!

info:HR and Systems 24-7: a Learning Management System Interface

by Jerry Rowland, Chief Technology Officer

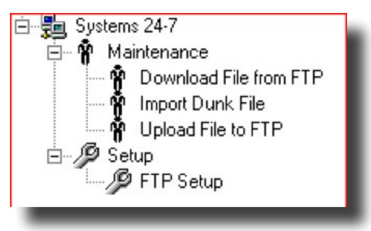
Systems 24-7 is a popular Learning Management System (LMS) suite from Dunk & Associates of Bobcaygeon, Ontario (of Tragically Hip fame). Since 2000, they have been serving all types of business sectors in successfully managing their workplace systems, especially in the areas of Health & Safety, Human Resources and Environmental.

Several info:HR clients also use Systems 24-7 and asked us about the possibility of creating an interface so that the two systems could share data. After speaking with our colleagues at Dunk—who were most helpful—Frank Shen, our Senior Software Engineer (and interface guru), and I embarked on a development project to provide the needed functionality.

After considering the data stored in info:HR that would be of use in managing employee training in Systems 24-7 and the data in that system that would be of use in info:HR for display and reporting purposes, we came up with a bi-directional interface that moves the relevant data in the proper direction.

On a nightly basis info:HR automatically creates five master files. These are:

1. **Employee Master** contains all 'active' employees regardless of their employment status.
2. **Course Code Master** contains all courses available in info:HR that have been identified as a Systems 24-7 course.
3. **Position Master** contains all positions defined in the info:HR Position Master.
4. **Department Master** contains a master list of all departments defined in info:HR.
5. **Employee Training Schedule** contains all the training courses assigned to employees via the Training Plan screen.



The files created are automatically uploaded to Systems 24-7 each night.

Weekly, a file is downloaded automatically from Systems 24-7 with the scores for all courses taken by employees. This download updates info:HR's Continuing Education and Training Plan screens. At that point all info:HR and ESS screens and reports will include the new employee training activity for the past week.

If you are using Systems 24-7 and are interested in learning more about this interface, contact me at **jerryr@infohr.com**.

Pay Stub Display in ESS

by Jerry Rowland, Chief Technology Officer

At the request of one of our clients in the municipal government sector, we are just putting the finishing touches on a new feature of our Employee/Manager Self Serve module to display employee pay stubs. Employees will be able to view, download and print their pay stubs directly from a new screen in ESS.

As you might expect, access to the actual pay stub data to be displayed, which is stored in your payroll system, will vary greatly from one payroll system to the next.

Because of this, the first payroll system to be supported will be iCity from Aptean. We will consider other payroll systems to be supported in the future depending on client demand.

In addition to displaying gross, deductions, net and benefits amounts on the pay stub, you can choose to add two additional displays: vacation/sick time balances; and, bank account deposits.

New security items in info:HR will control the importing of the pay stub data from the payroll system and the display in ESS – pay stub display will be restricted to the logged-in user; for confidentiality reasons supervisor/managers will not be able to see pay stubs of employees reporting to them.

If you'd like to learn more, including pricing and availability, please contact Michelle Beasley (**michelleb@infohr.com**) or Bill Kennedy (**billk@infohr.com**).

Webinar Schedule 2018-2019

FREE
WEBINARS
THURSDAYS
1PM EST

WEBINARS 2018

New Features: Emergency Leave	September 13
Simple Timesheets	October 18
ESS 5.3 New Look and Feel	November 15
Reporting	December 20

WEBINARS 2019

Year End	January 17
Flags, Follow-Ups, Comments, and Counselling	February 20
Reporting	March 21
Year End	April 18
Continuing Education and Training Plans	May 23
ESS Course Administration	June 20

ALL WEBINARS START AT 1PM EST

To register, please email **support@infohr.com** with the webinar of interest indicated in the subject line. You will receive a confirmation that you have been registered. Monday prior to the webinar you will receive a link and supporting documentation.

Space is limited, so in fairness to others please register only if you fully plan on attending. If there is more than one interested party at your organization, please share the registration/webinar log in.

Whenever possible, we like to create an interactive environment during our webinars; we encourage questions throughout the webinar. Please mute your telephone or computer microphone to minimize background noise. **See you at the next webinar!**

info:HR
SOFTWARE

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