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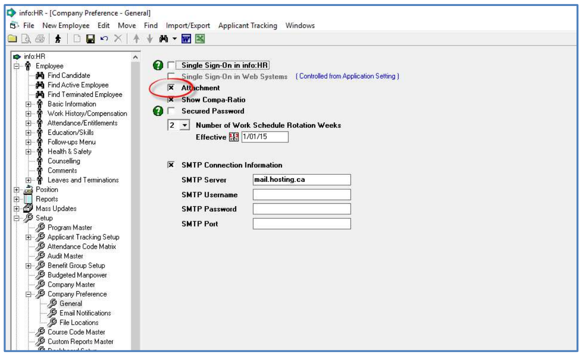
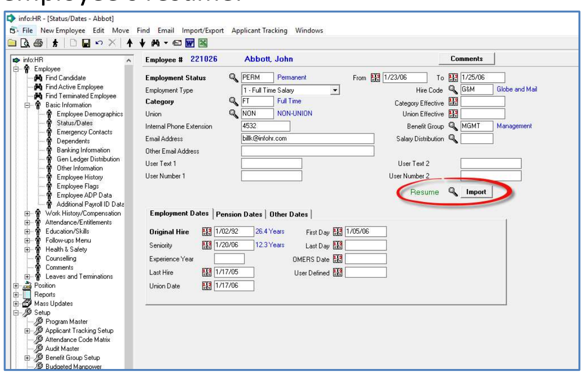
General Information

Attaching Documents

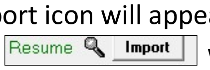
Assumption is made that the Document Attachment option is turned on. To check this, go to the **Setup/Company Preferences** screen. Ensure the **Attachment** box is checked.



Throughout info:HR there are various screens which allow the ability to attach a document to a record. For example: On the **Status/Dates** screen you have the ability to import a copy of the employee's resume.



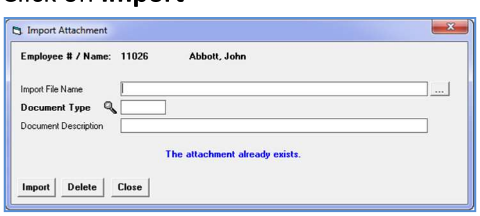
The Import icon will appear in two ways.

1. 

Without the red "X" means there is currently a document attached to the record. If you would like to view the attached document simply click on the magnify glass.
2. 

With the red "X" over the magnify glass means there is currently no document attached to this record. If you would like to **Import** a document

- Click on **Import**



  - To locate the file, click on the three dots button to the right of the box and find the file using the lookup.
  - Select a **Document Type** code. (*If document type code has a red "X" over the magnify glass, use security master to grant access to that code table*.)
  - If desired enter a **Document Description.**

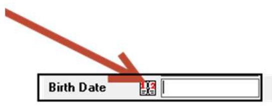
- When complete, click on **Import** and answer “**Yes”** to save the document.

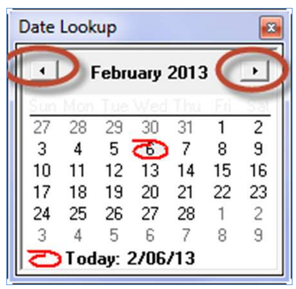
To delete the document or replace the document with another one, click on the **Import** button and click on either the **Import** or **Delete** buttons.

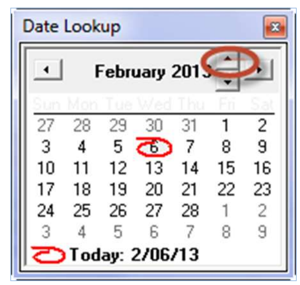
Date Lookups

For any field that requires a date be entered, you can either type the date manually (remember to use the date format set in Windows e.g. mm/dd/yyyy), or you can use the date icon () to select a date from the pop-up.

Navigation can be done by clicking on the Month and Year. Once the Month and Year are selected, click on the day of the month that’s needed. The right or left arrow keys will increase or decrease the month. The up or down arrow keys will increase or decrease the year.



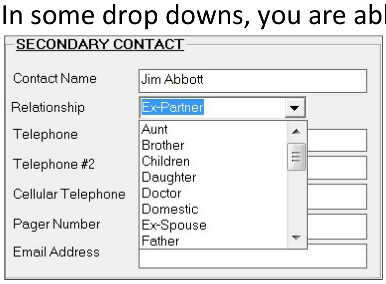




Drop Down Lists

Click on the drop down arrow and select one of the values listed. Only one value may be selected at a time.

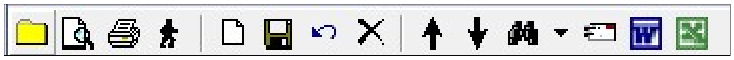
- In some drop downs, you are able to enter new values by typing the value into the field.

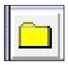


Navigating

Menu Icons

At the top of the info:HR window there is a row of icons that allow you to perform different functions throughout the system.

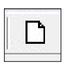


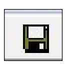
 **Close –** Will close the screen you are working in while leaving info:HR open.

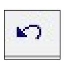
 **View** – Will allow you to view information prior to printing.

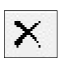
 **Print** – Will send the document to the printer without viewing.

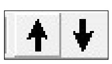
 **New Employee** – Will begin a new hire.

 **New Record** – Will allow you to enter a new record in any screen.

 **OK/Save** – Will save the information entered.

 **Cancel** – Will return you to the last saved point, removing all information entered that was not saved.

 **Delete** – Will delete the selected record.

 **Row Up/Down** – Provides the ability to move through a list of employees while remaining on the same screen.

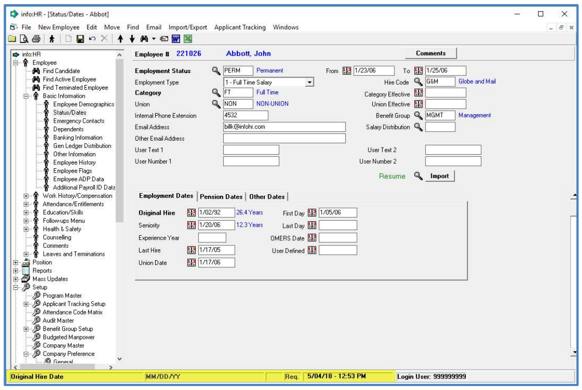
 **Find** – Provides the ability to Find Active Employee, Find Terminated Employee or Find Position.

 **Mail Box** – Provides the ability to send an email to the employee without closing info:HR.

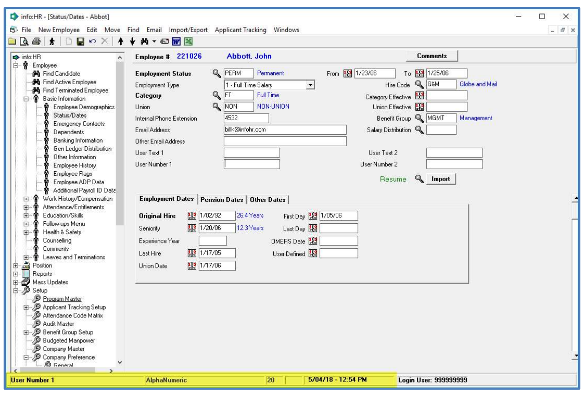
 **Word/Excel** – Provides the ability to open Microsoft Word or Excel without closing info:HR.

Information Bar

At the bottom of the info:HR window you will notice an information bar. This bar will tell you the field your curser is active on, the format of the information to be entered, the number of characters you are able to enter in the field and whether it is a required field or not. It also displays the current date and time in the format set in your computer.



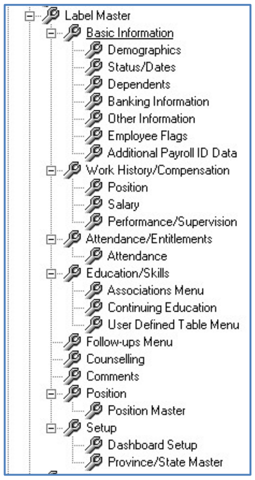
In the screen above notice the information highlighted. The curser is located in the Original Hire date field.



In the screen above the cursor is in User Number 1 field, which is an alpha numeric field that can hold 20 characters and is not a required field.

Re-labelling Field Names

There are a number of fields in the Employee Menu that can be re-labelled to reflect your organizational language. This re-labelling table can be found under **Setup/Label Master.** Then select the screen name you would like to re-label. The screen names are categorized in the same manner as found under the Employee menu item structure.

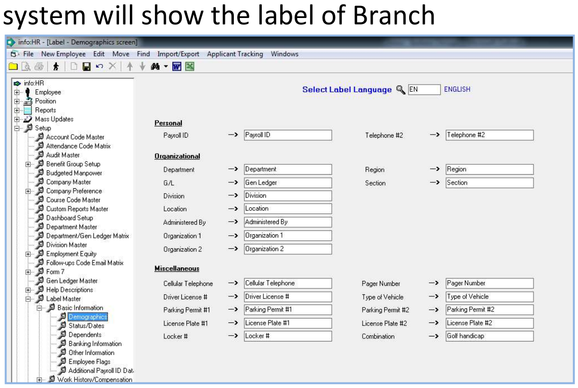


- This section not only allows for changes to field names in info:HR but there are a number of categories that can be renamed too. For example:

  - The menu structure name and field name is changeable for this function.

Changes made to the Label Master will be reflected throughout the system.

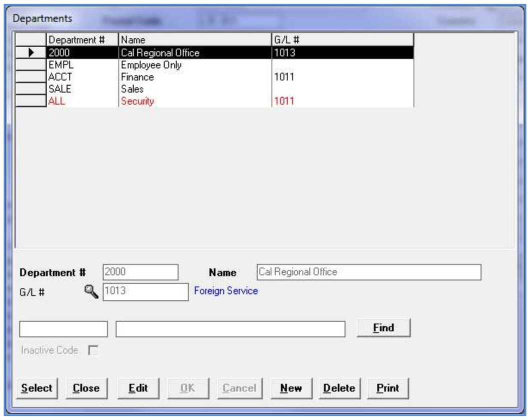
- For example, your organization does not use the label “Location” but would rather use “Branch”. After making the change in the Label Master, all areas and reports in the system will show the label of Branch



- For info:HR, the *Label Language* must always be “EN”. If the information is also used in ESS, a *Label Language* of “FR” is used for the Canadian-French translations.
- To change a label click in the text box, delete the old label and enter the new label. Click the **Save** button.

Table Lookups

Anywhere you see a **magnify glass** (), there is a code table where the codes are stored for that field. All Table Lookups have the same basic functions.



- To create a new code select **New**
- Enter in the **Code** and the **Description**
- Select **OK**

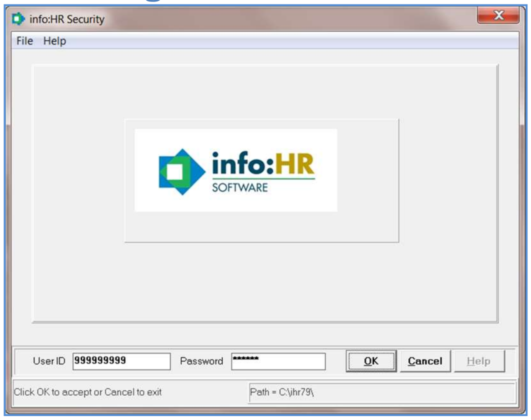
Notes:

1. A search can be made for any code by either typing in the code or description then selecting **Find**. When a code and its description show in red it has been made inactive; the code cannot be used but it has been used in the past and the history is maintained in the data base.
2. Some codes have other options that are maintainable on this screen too. For example, the Attendance Code lookup has “Seniority”, Incentive”, “Emergency Leave”, etc. that are maintained in the table code lookup screen.

Button	Purpose
Select	Once a code is highlighted, it can either be double clicked on, or click on the **Select** button to choose the code.
Close	Closes the coding table.
Edit	To edit a description of a code and other options; the Code itself cannot be changed.
Ok	When an edit is made select OK to save the changes.
Cancel	Will stop any actions taken.
New	To enter a new Code record.
Delete	To delete a code.
Print	Will print a list of all codes displayed in the table.

Getting Started

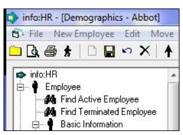
Initial Login Screen



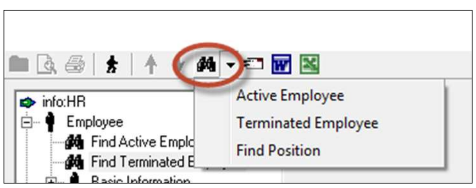
- To log in to info:HR enter your **User ID** and your **Password**.
- If info:HR is set up for single sign on, this screen will not appear. For single sign on to work, the network user ID must be identical to the info:HR User ID.

Find Active Employee

There are two ways to search for an Active Employee:

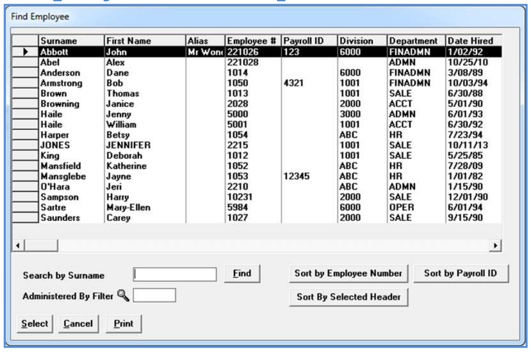


- Click on the **Find Active Employee** from the Main menu on the left of the screen.



- Click on the binoculars icon in the top menu bar and select **Active Employee** from the drop down list or select **Active Employee** from the menu on the left. The **Find Employee** window will open.

Employee Look Up



To find a specific employee, type the surname, or part of, into the Search By field, then select "**Find**".

- For example: If you type "S" into the Search By field, it will take you to where the first "S" Surname begins. If you type in "Smith," it will take you to the first occurrence of "Smith."

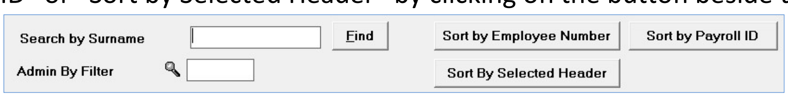
To filter the Employee list:

- If you utilized the **Admin By** field on the Demographics screen you can filter the Active Employee List by the code selected.
- Example: An Administrator only wants to see the employees they are responsible for.

Clicking on any of the headings will sort the list by that column in ascending order. Double clicking will sort in descending order.

- Example: To view alphabetically by first name click on the First Name heading. A single click will sort the list a – z, double clicking will sort the list z – a.

The default sort (display) order can be changed to "Sort by Employee Number", "Sort by Payroll ID" or "Sort by Selected Header" by clicking on the button beside the **Find** button.

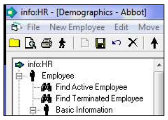


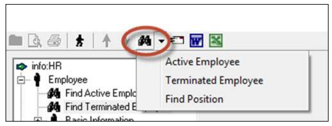
- Once the button is clicked, the **Search by** is changed to match the button selected.
- To sort by a selected header, click on the header name prior to clicking on the **Sort by Selected Header** button.

To select the employee you can either double click on the row or click on the **Select** button once the name is highlighted.

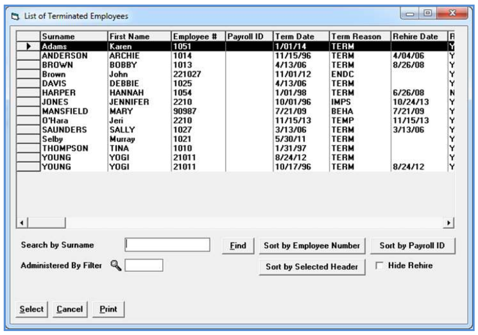
Find Terminated Employee

There are two ways to search for a Terminated Employee:





- Click on the **Find Terminated Employee** from the Main menu on the left of the screen.
- Click on the binoculars icon in the top menu bar and select **Terminated Employee** from the drop down list or select **Terminated Employee** from the menu. The **Find Employee** window will open.



Surname	First Name	Employee #	Payroll ID	Term Date	Term Reason	Rehire Date	R
Adams	Karen	1051		1/01/14	TERM		Y
ANDERSON	ARCHIE	1014		11/15/96	TERM	4/04/06	Y
BROWN	BOBBY	1013		4/13/06	TERM	8/26/08	Y
Brown	John	221027		11/01/12	ENDC		Y
DAVIS	DEBBIE	1025		4/13/06	TERM		Y
HARPER	HANNAH	1054		1/01/98	TERM	6/26/08	N
JONES	JENNIFER	2210		10/01/96	IMPS	10/24/13	Y
MANSFIELD	MARY	90987		7/21/09	BEHA	7/21/09	Y
O'Hara	Jeri	2210		11/15/13	TEMP	11/15/13	Y
SAUNDERS	SALLY	1027		3/13/06	TERM	3/13/06	Y
Selby	Murray	1021		5/30/11	TERM		Y
THOMPSON	TINA	1010		1/31/97	TERM		Y
YOUNG	YOGI	21011		8/24/12	TERM		Y
YOUNG	YOGI	21011		10/17/96	TERM	8/24/12	Y

To find a specific terminated employee, type the surname, or part of, into the Search field, then select “**Find**”.

- For example: If you type “S” into the Search field, it will take you to where the first “S” Surname begins. If you type in “Smith,” it will take you to the first occurrence of “Smith.”

To filter the Employee list:

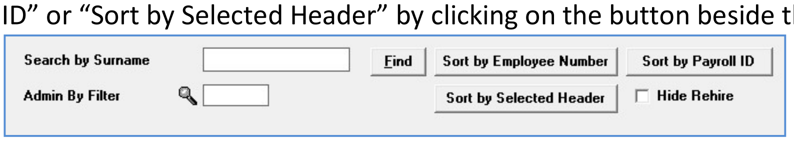
If you utilized the **Admin By** field on the demographics screen you can filter the Terminated Employee List by the code selected.

- Example: An Administrator only wants to see the employees they are responsible for.

Clicking on any of the headings will sort the list by that column in ascending order. Double clicking will sort in descending order.

- Example: To view alphabetically by first name click on the first name heading. A single click will sort the list a – z, double clicking will sort the list z – a.

The default sort (display) order can be changed to “Sort by Employee Number”, “Sort by Payroll ID” or “Sort by Selected Header” by clicking on the button beside the **Find** button.

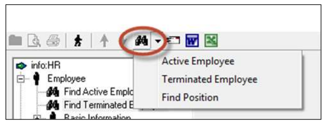


- Once the button is clicked, the **Search by** is changed to match the button selected.
- To hide employees that have already been rehired, click on the **Hide Rehire** option.

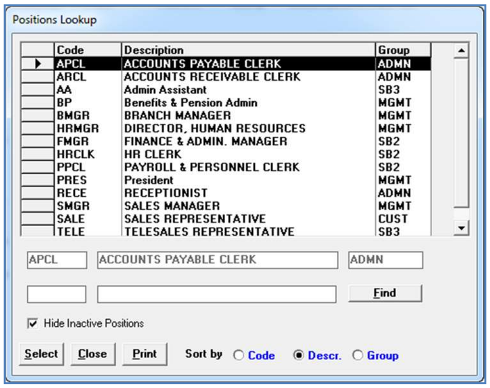
To select the employee you can either double click on the row or click on the **Select** button once the name is highlighted.

Find Position

There are two ways to search for a Position:



- Click on the **Position/Find Position** from the Main menu on the left of the screen.
- Click on the binoculars icon in the top menu bar and select **Find Position** from the drop down list or select **Position** from the menu. The **Find Position** window will open.



Clicking on any of the headings will filter the list by that column in ascending order. Double clicking will filter in descending order.

- Example: To view alphabetically by description click on the Description heading. A single click will sort the list a – z, double clicking will sort the list z – a.

You can also filter using the radio buttons below. These buttons also control how you want to search for a position.

Code - Will sort the list alphabetically by Position Code. If search using the Position Code, enter the sort information in the yellow highlighted area and click **Find**.
Descr - Will sort the list alphabetically by Position Description. If search using the Position Description, enter the sort information in the green highlighted area and click **Find.**
Group - Will sort the list alphabetically by Group Code. You cannot search by Group code.

Search using Position Code or Description:

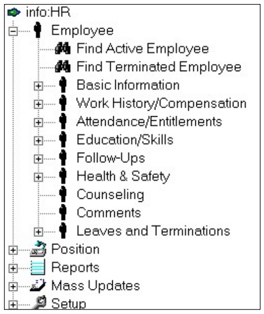
Type the code or description into the field and click **Find**.
To select the position you can either double click on the row or click on the **Select** button once the position is highlighted.

To close the Lookup window click **Close.**
If you would like a printed list of Positions click **Print** and the report is displayed to view, export or print.

The **Hide Inactive Positions** check box when checked will hide the positions which have been marked as inactive. To view all positions uncheck the box. All inactive positions codes will show up in red.

Menu Structure

The menu structure in info:HR has the look and feel of Outlook. There are several section headings; when you click on the heading or plus sign you can expand the menu. To close the menu, click on the minus sign.
Info:HR is comprised of five main sections. There are multiple functions under each section.



Employee: Items under this menu are directly related to the selected employee. Items are categorized based on type of information being stored.

- For example, salary information for an employee is found under **Work History/Compensation** whereas time and attendance is found under **Attendance/Entitlements**.

Find Active Employee and **Find Terminated Employee:** This option provides the ability to look up either active or terminated employees.

Position: Items in this menu are related to the positions in the organization and not the employee who occupies the position.

- For example, salary grids, skills, evaluation factors, required courses and budged positions.

Reports: Provides access the various predefined reports within info:HR. Each report has extensive selection criteria that allow the user to provide reports for a specific group of employees.

Mass Updates: Items in this menu allows for mass changes to the data in the system.

- For example, codes, salary adjustment, entitlements, etc.

Setup: These items define the global settings of info:HR that enable the system to be customized to match organizational structure and policies.

Depending upon your setup, other menu items may appear below **Setup**. For example and not limited to:

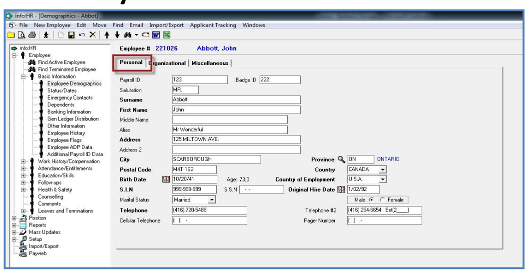
Employee Basic Information

Employee Demographics

This screen is the first screen completed when setting up a new employee in info:HR. There are three tabs on this screen. They are:

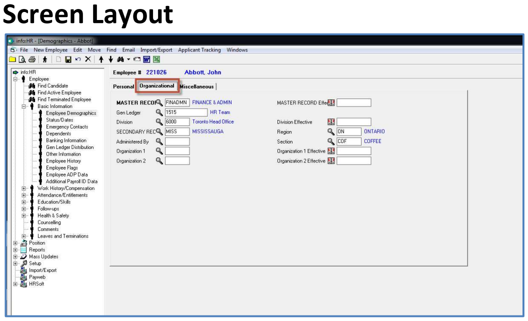
1. **Personal:** Tombstone information; bolded fields are mandatory. The information in this section contains all of the employee's personal information. This information is also used if transferring information to a 3rd party system such as payroll or benefits. Most of this information can be maintained by the employee via the ESS/MSS module or is tracked and updated by Human Resources.

   Screen Layout

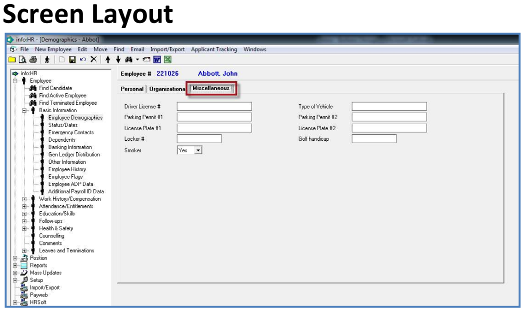
2. **Organizational:** This information provides HR with the ability to group employees based on organization structure or reporting structures. The information entered here makes up some of the selection criteria used to filter reports. Please refer to the Reports User Manual for more information on Reporting.

   Screen Layout

3. **Miscellaneous**: The information contained in this tab is not mandatory to the system. This tab can be used to store other information required by the organization.

   Screen Layout

Field names that are **bolded** are Mandatory fields. Additional field names may be bold if they are required by 3rd party systems. Other fields are populated depending or your organizational requirements. It is recommended to complete information in the Organizational section to mirror the organizational or reporting structure that is needed.

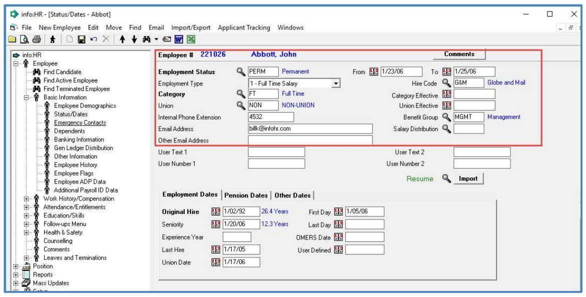
Buttons

Button	Purpose
Photo/Photo Off	Click this button to turn on or off the photograph of the employee. Employee Photos can be imported via the **Mass Update** / **Import Photos** menu item. Please refer to the *Mass Update User Guide* for further instructions.
What's Missing	By using the **New Hire Procedure** checklist located under the **Setup** menu, the application checks the info:HR tables for certain required information on each of the screens identified in the New Hire Procedure. If the data is not present, the application will list the screens that contain the missing information. Otherwise, a message will pop up indicating that there is no missing information for that employee.

Status and Dates

This is the 2nd screen of information which must be entered when hiring a new employee in info:HR. Most field names can be changed in the Label Master; please refer to the Re-labeling section of this manual.

Screen Layout – Section 1



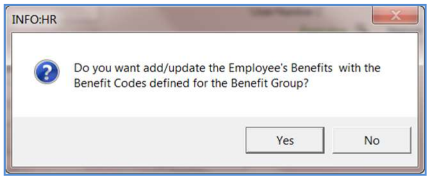
This section describes the nature of the employee's employment, associated dates, as well as assigning a *Benefit Group* so that the employee's benefits are set up during the *New Hire Procedure*.

Bolded fields are mandatory. Information entered here represents the employees' status in the organization.

- ***Employment Status*** defines whether the employee is permanent, temporary, active or on a leave. The *From Date* indicates when the employee became Active, Reactivated from a leave or is the start date of a leave. The *To Date* will should remain blank unless the employee is on a leave or they are on contract. When a To Date is entered on the Employment Status, a Follow-Up reminder is created using Follow-Up Type "EDTO". A change or removal of the To Date will update or delete the respective Follow-Up record. The leave of absence processing updates these dates. Employment Status can be any type of status and the From/To Date indicates the period the Status is going to be in effect.
- ***Category* and *Effective*** date provide the ability to track the Category changes. Examples of a Category are Full-Time, Part-Time, Contract, etc.
- When the ***Internal Phone Extension*** and ***Email Address*** are complete you will be able to print an active phone list for the organization, using the Telephone Extension Report. By setting up the employee's email address you can send email to the individual without closing info:HR.
- A ***Benefit Group*** can be assigned, which identifies which benefits that the employee is enrolled into. When entering, changing or deleting a Benefit Group, the user will be prompted to select the benefits that the employee will qualify for. Refer to the instructions below on how to process Benefit Group changes.
- ***Salary Distribution*** is used only by payroll.
- This screen allows you to attach the employee's resume to the info:HR file.

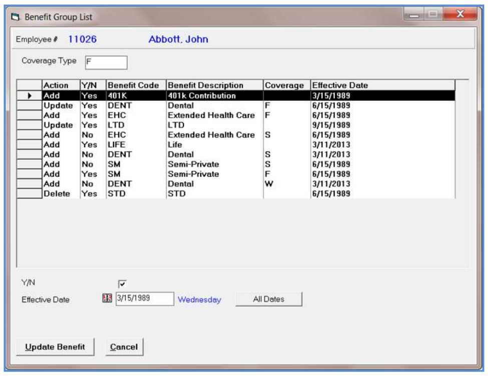
Changing Benefit Groups

Upon saving the Status/Dates screen, the screen below appears:

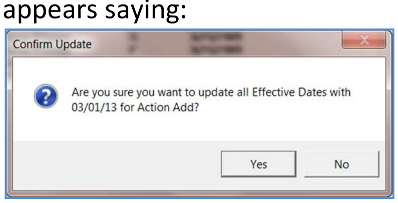


- You should always click **Yes** if you get this message. If, by accident, No is selected, you will need to go into the Benefits and manually make the changes.

Upon clicking Yes, the screen below appears:

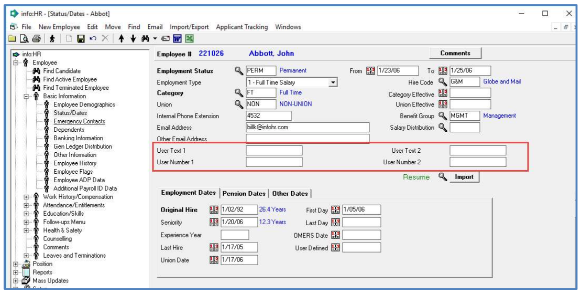


- Based on the old Benefit Group and the new Benefit Group, the Action column displays what the application will do with the benefits. The Actions available are:
  - **Add** – Adds a new benefit to the employee
  - **Update** – Updates the costing of an existing benefit to the employee
  - **Delete** – Deletes the benefit from the employee.
- The next column indicates whether or not to update the employee's benefits with the changes. Y for Yes and N for No.
- Type in the Coverage Type if the employee has selected all benefits of the same Coverage Type. With the Coverage Type completed, the application will automatically turn the **Y/N** column to No for all benefit coverage types that do not equal the entered Coverage Type.
- If changing from one Benefit Group to another, enter the new Effective Date. Click on All Dates to change all Benefit Effective Dates to equal the date typed in. A message appears saying:



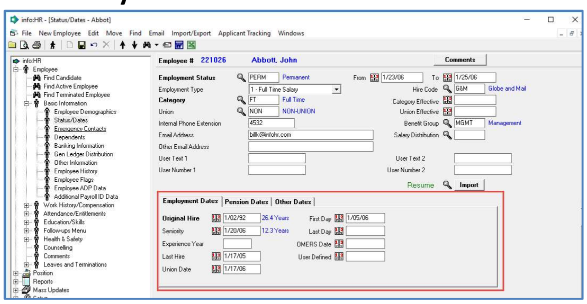
  - C lick **Yes** if all dates should equal the date entered.
  - The same message appears if you enter a new benefit End Date. All benefits may or may not end on the same day.

Screen Layout – Section 2



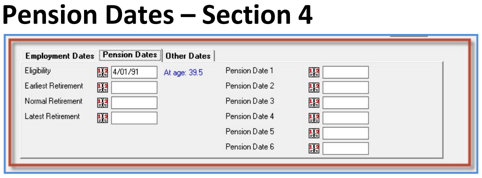
User defined fields provide the ability to track other information for employees that may not be present but required by the organization.

Screen Layout – Section 3



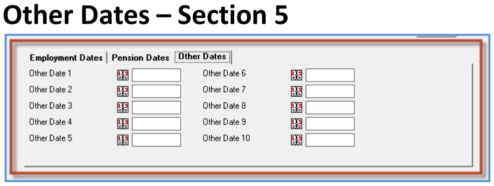
Employment Dates tab provides the ability to track various dates related to the employment status; these dates are used to calculate Entitlements.

Pension Dates – Section 4



Pension Dates tab provides the ability to enter dates specifically related to the employee's Pension. These dates are used to calculate Pension Entitlements. Pension Dates 1 – 6 labels can be changed in the Label Master.

Other Dates – Section 5



Other Dates tab provides the ability to enter 10 other dates which the organization may be required to track. The field names can be changed in the Label Master

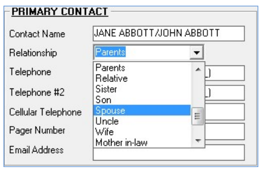
Emergency Contacts

This section is used to store Primary and Secondary contacts, as well as Doctors' information. It is recommended to have at least a Primary Contact in the system in case of emergency.

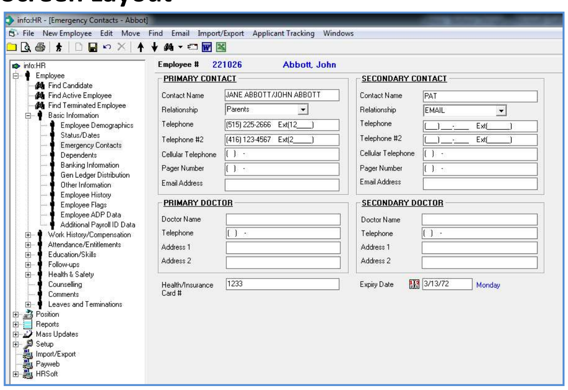
Emergency Contact Report is available under Reports / Employee Information

Relationship Drop Down can be changed if the correct relationship term for your organization is not in the list. Type in the Relationship term you require. The system will save the term for future use.

Drop Down



Screen Layout



Complete as much information as required, then click **Save**.

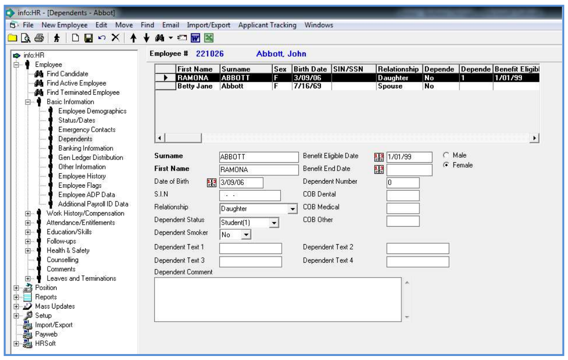
Dependents

Use this function to maintain dependents information for each employee as necessary for communicating with a benefits provider. Fields are to be completed with the appropriate information required by the organization and benefits provider.

"COB" titled fields refer to the term "Coordination of Benefits" and if required by the benefits provider must be completed. All fields can be relabeled in the Label Master to meet your organizational terminology.

Dependent Report is available under Reports / Employee Information.

Screen Layout



Complete as much information as required, then click **Save**.

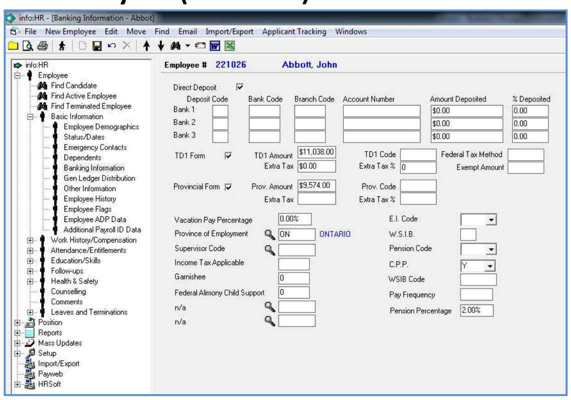
Banking Information

Use this function to maintain payroll and banking information only if you are using a Payroll Interface. The information on this screen gets passed between info:HR and payroll system when new employees are added or when the information has changed.

The Direct Deposit checkbox is turned 'ON' by default when entering banking information for an employee.

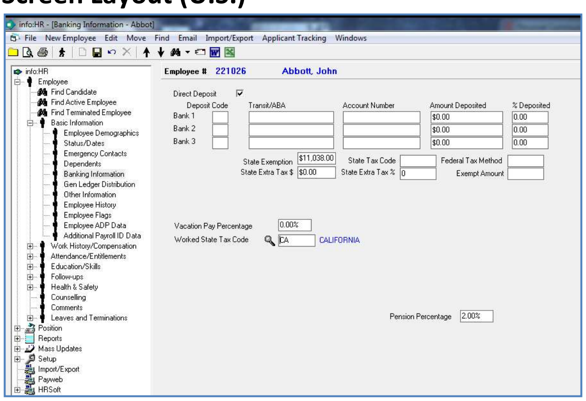
The use of the fields on this screen are dependent on the payroll product that info:HR is being interfaced with. Your HR Systems Strategies Inc. consultant will work with you to determine which fields are required.

Screen Layout (Canadian)



Complete as much information as required, then click **Save**.

Screen Layout (U.S.)



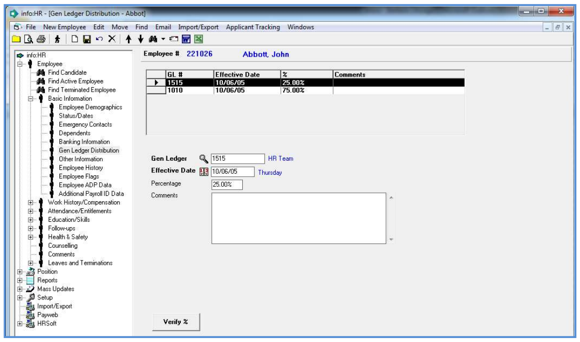
Complete as much information as required, then click **Save**.

G/L Distribution

This is used only for certain payroll interfaces and should only be completed if needed.

The purpose of this function is to split an employee's salary and/or benefits across multiple general ledger accounts.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Effective Date	Provides the ability to enter a date which the salary is to be applied to the G/L account.
Percentage	Provides the ability to assign a percentage of the salary to the G/L account.
Comments	Provides the ability to enter any notes required against the entry.

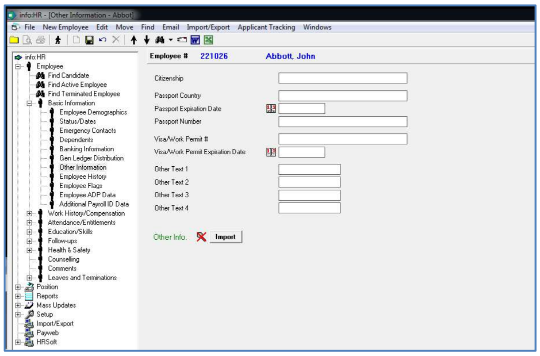
Buttons

Button	Purpose
Verify %	Once all the entries have been entered for an employee, click this button to verify that the percentages entered add up to 100%.

Other Information

Provides an area to track Passport, Visa Work/Permit and their expiry Dates. There are four other fields available for other information which may be required. When an Expiration Date is entered a Follow-Up record is created, using a type code of "PE" for passport expiry and "WP" for work permit expiry. These fields can be renamed. Please see Re-labelling section of this document.

Screen Layout

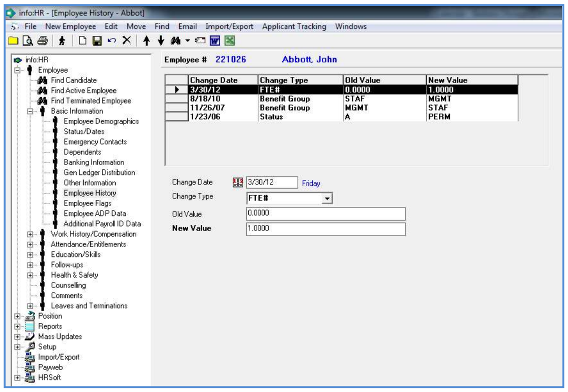


Complete as much information as required, then click **Save**.

Employee History

This screen is automatically populated from changes that are made on a to an employee's profile. It creates a date stamp of the day the change was made and who made the change. This screen is typically only used upon start up to document employee history prior to using info:HR.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Example of how to use this screen:

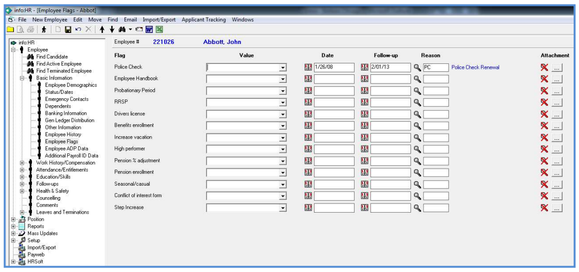
View Employment Status Changes made by an employee:

1. Click on the header **Change Type**. This group all Change Types together.
2. Look for the Change Type **Status** and read the Employment Status changes chronologically.

Employee Flags

These are your "**one time**" reminders. The setup of Employee Flags is found in Setup/Label Master/Basic Information/Employee Flags. You have 20 flags to label, and once labelled, they will appear here.

Screen Layout



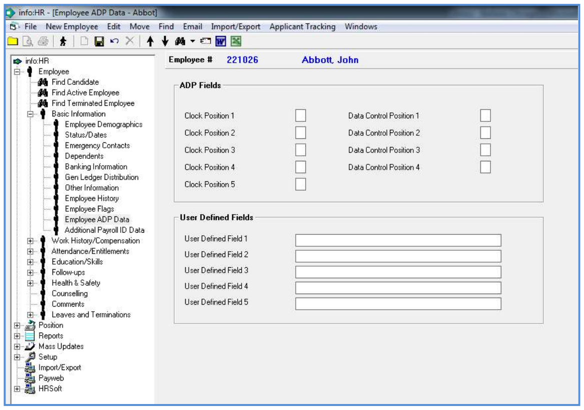
Information Validation

Field	Purpose
Value	Provides the ability to enter an "action" word or phrase for each follow-up. This will remain in the drop down list for future use.
Date	This is the date the value is effective or was entered into info:HR.
Follow Up	If you want the application to create a Follow-Up record for a given date, enter the date here.
Reason	This is the same table as your Follow-Ups. You can create separate ones for each flag, group some of them together, or use the existing ones.
Attachment	Provides the ability to import a document for each flag.

Employee ADP Data

This screen is not for general use. It is only used if you have the ADP PC/PW payroll interface.

Screen Layout

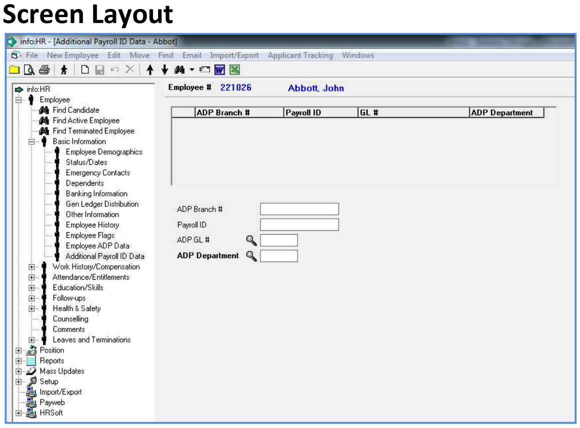


Complete as much information as required, then click **Save**.

Additional Payroll ID Data

This screen is not for general use. It is only used if you have the ADP PC/PW payroll interface.

Screen Layout



Complete as much information as required, then click **Save**.

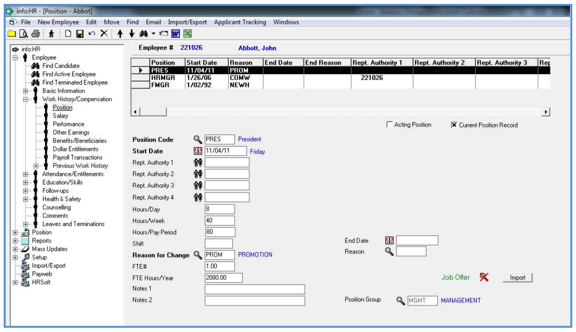
Work History/Compensation

Position

The Position screen is the 3rd screen in the New Hire Process; each employee must have a current position. This screen documents the employee's current and historical Position information. A new record must be created with each Position change within the organization to accurately capture the Position history.

Every employee must have a current Position record, otherwise they will not appear on most info:HR reports.

Screen Layout



Information Validation

Field	Purpose
Position Code	Select the position code by entering the Position Code or by clicking on the magnify glass and select the position from the Look Up.
Reporting Authority	Represents the organization hierarchy. Either enter the employee number or click on the people icon () and select the name of the supervisor from the employee look up window. To use ESS, one of the Report Authorities must be entered.
Hours/Day	These hours are the FULL TIME hours for the position. This is mandatory if you are using FTE# or Days option when calculating Entitlements.
Hours/Week	These hours indicate how many hours are worked in a week. If the employee is paid an annual salary, this field should be completed. It is used during the calculation of Annual Rate to Hourly Rate.
Hours/Pay Period	These hours indicate how many hours an employee will work within a pay period. Traditionally, this value is sent to payroll on the employee master transfer.
Shift	Enter a shift value if applicable.

Field	Purpose
Reason for Change	Select a reason code by entering the code or using the magnify glass to select the reason code from a look up window. This could be New Hire, Promotion, etc.
FTE#	This field is mandatory if you are calculating entitlements based on FTE#.
FTE Hours/Year	Provided that the Position Master has a FTE Hours per Year entered, this field will automatically populate. The calculation is the Employee's FTE# multiplied by the FTE Hours per Year in the Position Master for this Position.
Notes 1 and 2	Can be utilized to store other information. Field names can be changed in the Label Master.
End Date and Reason	Enter when this position has ended.
Position Group	Is automatically displayed from the information in the Position Master.

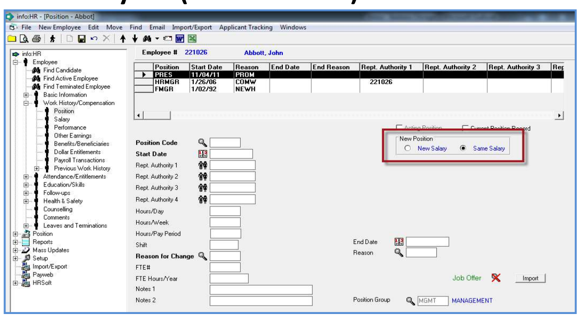
Buttons

Button	Purpose
Import	Provides the ability to attach an offer letter to the record.

When creating a new record, you will need to select an option for the Salary Master. The options are:

1. Same Salary (default)
    a. If selected, the application will automatically create a new salary record for the employee using the Position, Position Start Date and Hours per Week that is entered on this screen. The old position will be marked as "not current" and the new record will be marked as "current".
2. New Salary
    a. If selected, no salary record is automatically created. The user will need to go to the Salary screen and enter a new salary record.

Screen Layout (New Position)



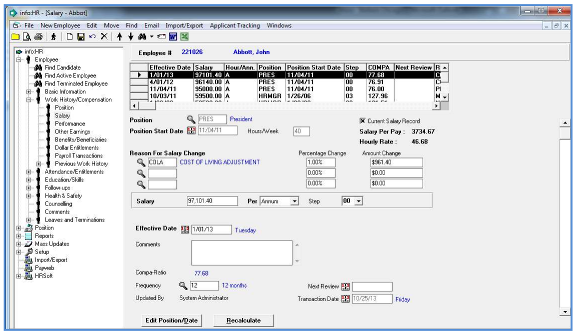
- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record. The user should also delete the matching Salary and/or Performance record.

Salary

Salary is the 4th screen in the New Hire Process. The employee's salary information is captured here. When entering a new hire the salary information must be completed to properly track the employee's salary information. A new record should be created with each change in salary to maintain the employee's salary history.

Every employee must have a current Salary record, otherwise they will not appear on most info:HR reports.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

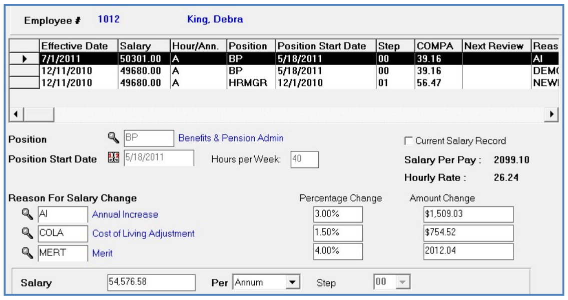
Field	Purpose
Position/Start Date/Hours per Week	Will auto populate based on the information from the Employee's position screen.
Reason for Salary Change	Select the appropriate reason code to define why there was a change in salary.
Salary	Enter the salary amount.
Per	Select from the drop down *Per* Annum, Hour, Daily or Monthly.
Step	If you use Grid Steps, from the Position Master, select the **Step** in which the employee's salary resides on.
Effective Date	Select the date the salary becomes effective.
Comments	This field can be used for additional notes.
Pay Period	Select the pay period the salary will take effect.
Next Review	A date can be entered here to create a follow-up for the next Salary Review.
Updated By	Displays the name of the login user who created or changed the record.
Transaction Date	Displays the date the record was changed.

There are multiple methods of providing a salary increase to one employee; they are:

1. In the **Salary** box, type in the new salary and select the **Per**. The system will calculate the Percent Changed 1 and Amount Changed 1 using the old and new current salary information.

2. If an employee is paid based on a grid step, you can increase their salary by selecting a **Step** from the drop down list. The system will calculate the new Salary, Percent Changed 1 and Amount Changed 1 using the old and new current salary information.

3. An employee can also receive an increase based on a percentage or fixed dollar amount. These increases may be broken into different reasons, each having its own percentage and/or amount changed. Refer to example below:



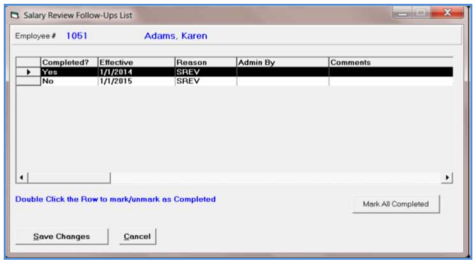
- Original salary was $50,301.
- Received three increases totalling 8.5%.
- Each Amount Change is calculated using the Percent Change against the old salary.
- The sum of all increases makes up the employee's current salary.

Note: The user could also enter the Amount Change for each reason and the application would calculate the Percentage Change.

Buttons

Button	Purpose
Edit Position/Date	Provides the ability to edit the employee Position data. This should only be used if correction to data is needed.
Recalculate	This button recalculates the Percent Change and Amount Change based on the previous and current salary. It ignores the Multi-Position logic.

When saving a new salary record, the application will check the Follow-Up Master for the employee being updated. If there is a Salary Review Follow-Up record for this employee, a box pops up showing all salary review Follow-Ups.

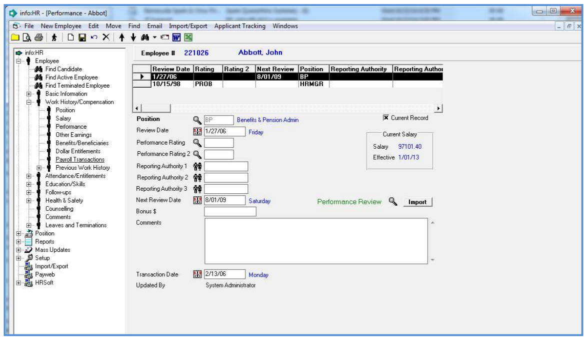


- To mark the record complete, double-click on the line which changes the “Completed” column from No to Yes.
- Click on **Mark All Completed** button to mark all the Follow Up records of the employee listed as Completed.
- Click on **Save Changes** to update the Follow-Up Master.

Performance

The employees' Performance information is captured here. When entering a new hire the Performance information could be completed to track the employee's probationary period. A new record should be created with each change in Performance to maintain the employee's Performance history.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

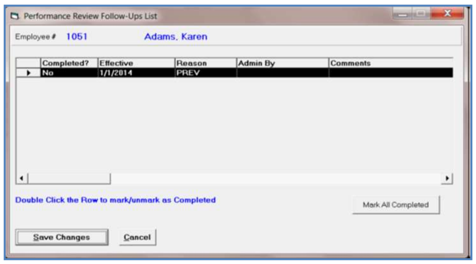
Information Validation

Field	Purpose
Position/Salary/Effective	Will auto populate based on the information from the Employee's position screen.
Reporting Authority	Provides the ability to enter either the reporting structure within the organization or who actually performed the Performance Review.
Review Date	This is the date the performance review took place.
Performance Rating	Select a performance rating code.
Next Review Date	Enter the date for the next Performance Review and the system will create a Follow up for the Performance Review.
Bonus	May be entered as a part of the record for reference purposes.
Comments	Can be entered if applicable, for reference purposes.
Transaction Date	Is automatically populated when the record is saved and can be altered.
Updated By	Is automatically populated and cannot be changed. It will show the name of the user who last saved the record.

Buttons

Button	Purpose
Import	Provides the ability to import a copy of the review.

When saving a new performance record, the application will check the Follow-Up Master for the employee being updated. If there is a Performance Review Follow-Up record for this employee, a box pops up showing all performance review Follow-Ups.

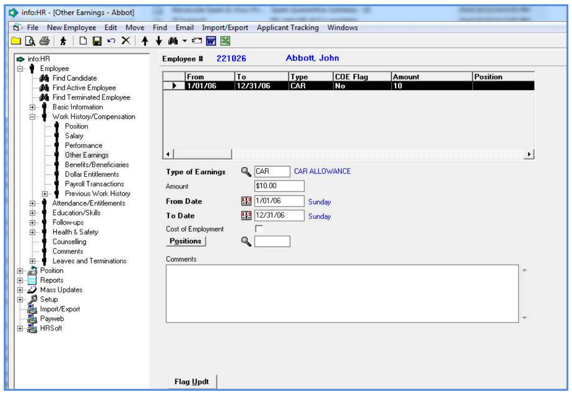


- To mark the record complete, double-click on the line which changes the “Completed” column from No to Yes.
- Click on “Mark All Completed” button to mark all the Follow Up records of the employee listed as Completed.
- Click on **Save Changes** to update the Follow-Up Master.

Other Earnings

The purpose of this screen is to capture earnings other than the regular pay. For example: Commission, Bonus, etc. Traditionally, this screen can be automatically populated if a client is importing YTD earnings and deductions from their payroll provider.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Type of Earning	Enter the Earning Type Code by entering the code or using the magnify glass and selecting the code from the Look up table.
Amount	Enter the earning value.
From and To Date	Enter the dates in which the earning was received.
Cost of Employment	If this earning is deemed as a adding to an employee's cost of employment click the check box.
Comments	Can be included if necessary.

Buttons

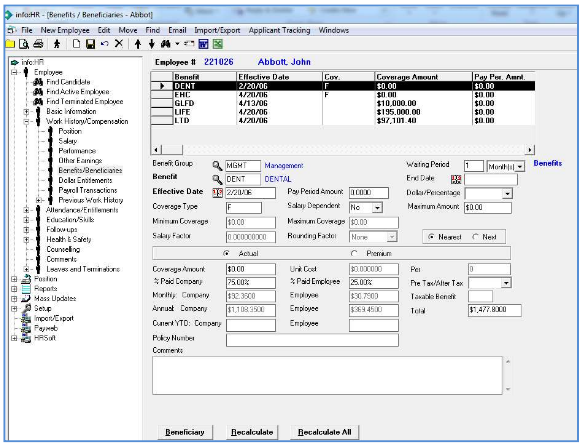
Button	Purpose
Flag Updt	Provides the ability to check or uncheck all earnings as Cost of Employment.

Benefits

The benefits screen lists each benefit the employee receives, what the employer and employee contributions are and the total cost. The majority of the benefits appearing here are automatically added when assigning a Benefit Group to an employee on the Status/Dates screen. Any benefit that has a *Benefit Group Code* should never be changed on this screen. If, for some reason, the details of the benefit must be changed for an individual employee, remove the *Benefit Group Code* prior to making any changes.

Optional benefits that are not part of a *Benefit Group* can be manually entered here. Examples of optional benefits include: Spousal Life, Dependent Life, RRSP, etc.

Screen Layout



- To enter a new benefit record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

These fields are defined in the Benefit Group Master setup section of the Setup User Manual. Please refer to that document for more details.

Buttons

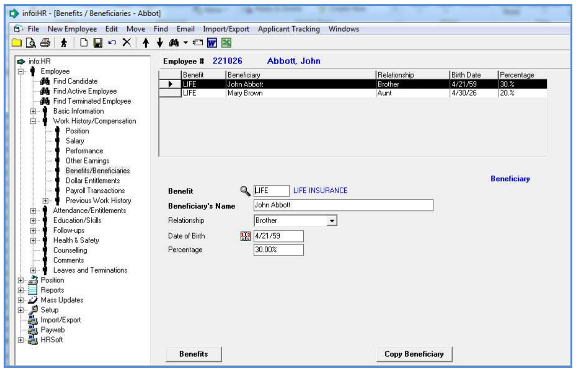
Button	Purpose
Beneficiary	This button opens the Beneficiary screen.
Recalculate	This button recalculates the cost of the highlighted benefit.
Recalculate All	This button recalculates the cost for all benefits.

Note: If should not be necessary to recalculate the benefits unless some unforeseen issue occurs. Benefit costs should be automatically updated during the day-to-day processing in info:HR.

Beneficiary

The purpose of this screen is to track beneficiaries assigned to a benefits. One benefit can have an unlimited number of beneficiaries.

Screen Layout

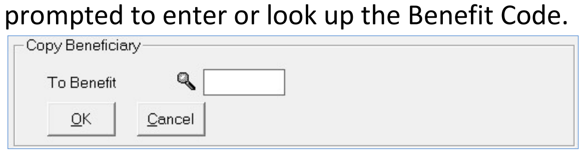


- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Benefit	Enter the Benefit Code or click on the magnify glass to select the code from the look up.
Beneficiary's Name	Beneficiary's Name.
Relationship	Select from the drop-down list provided.
Date of Birth	Enter their date of birth.
Percentage	Enter the percentage of benefit being received.

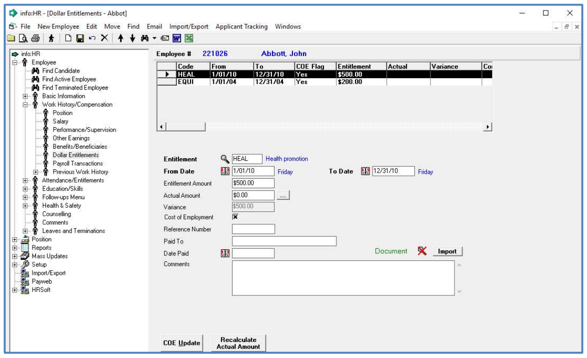
Buttons

Button	Purpose
Benefits	This button returns to the Benefit screen
Copy Beneficiary	This button copies all beneficiaries from one Benefit to another. When pressed, the user is prompted to enter or look up the Benefit Code.  Clicking **OK** copies the beneficiaries to the new Benefit Code.

Dollar Entitlements

This section tracks any Dollar Entitlements given to employees. Examples of Dollar Entitlements include: Safety glasses, work boots, etc.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Entitlement	Enter the Dollar Entitlement Code or click on the magnify glass to select the code from the look up.
From and To Date	Automatically populates with the Fiscal Year Date Range located in the Company Master. This can be changed if necessary.
Entitlement Amount	The amount the employee is entitled to.
Actual Amount	The amount paid out to the employee.
Variance	Automatically calculated and is the difference between the Entitlement Amount and the Actual Amount.
Cost of Employment	Identifies that this expense will add to the employee's cost of employment.
Reference Number	Provides the ability to enter a reference number such as a receipt number or invoice number.
Paid To	Provides the ability to enter the name of the person or organization the money was paid to.
Date Paid	Provides the ability to enter the date the money was paid out.

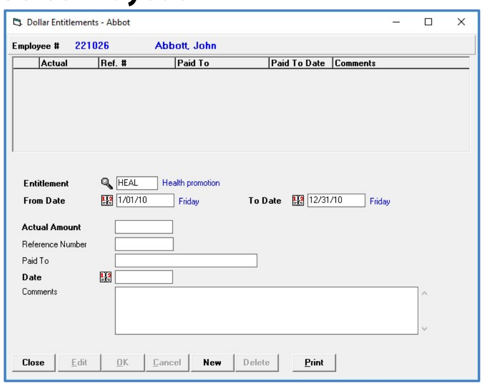
Buttons

Button	Purpose
Import	Provides the ability to attach a document such as a receipt to the record.
COE Updt	Provides the ability to change the COE Flag for all entitlements to say “Yes”.

Entering multiple records against a single dollar entitlement, click ... .

- This provides the ability to record multiple receipts against the annual entitlement.

Screen Layout



Information Validation

Field	Purpose
Entitlement	Automatically populates with the dollar entitlement code.
From Date	Automatically populates with the entitlement date range.
To Date	Automatically populates with the entitlement date range.
Actual Amount	Displays the amount of the Dollar Entitlement.
Reference Number	Provides the ability to enter a reference number
Paid To	Provides the ability to record the name of the person or organization who received payment.
Date	Provides the ability to record the date of the payment.
Comment	Provides the ability to enter additional information.

Buttons

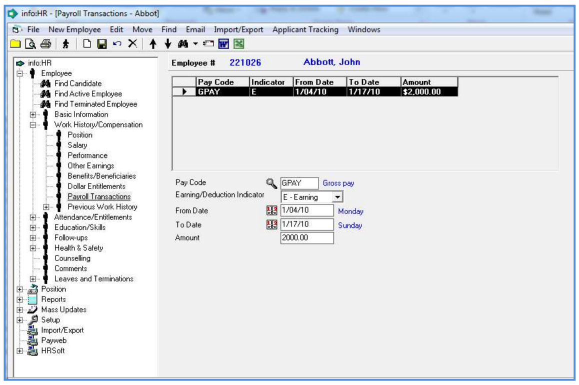
Button	Purpose
Close	Closes the Dollar Entitlement Window
Edit	Provides the ability to edit the selected record.
Ok	Saves changes made to the record.
Cancel	Clears the data entered and not saved.
New	Creates a new record.
Delete	Deletes the selected record.
Print	Prints all records.

Payroll Transactions

This screen is only populated by certain payroll interfaces. It records all earnings, deductions and memo codes for each pay cycle. Pay Codes make up the details in the employee's Payroll Register. The user has the ability to control which items are imported via the "PAYT" Type in the Payroll Matrix. Refer to the Setup User Manual for more details.

Manual data entry is also available.

Screen Layout



- To enter a new position record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

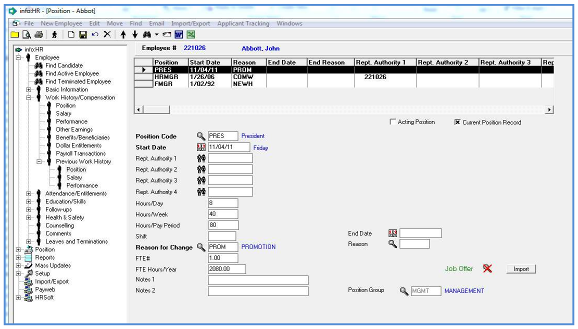
Information Validation

Field	Purpose
Pay Code	Enter the Pay Code or click on the magnify glass to select the code from the look up.
Earning/Deduction Indicator	Select from the drop down Deduction, Earning, or Memo.
From To Dates	Payroll Cycle From and To Date range.
Amount	The amount associated with the Pay Code.

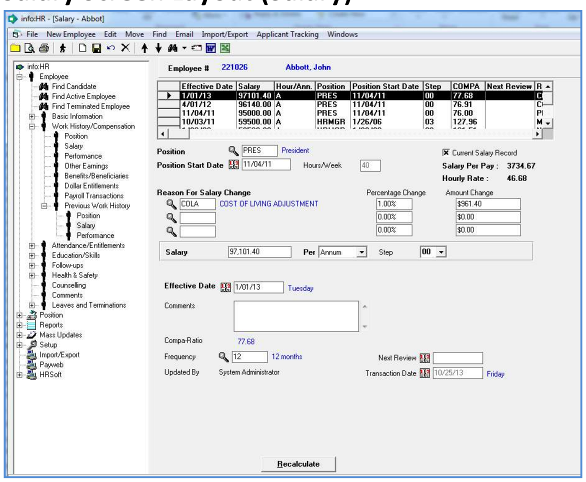
Previous Work History

These screens look identical to the Position, Salary and Performance screen. The only difference is the functionality in the back end. The Previous Work History screens will allow you to enter Positions, Salaries or Performance Reviews that have a start/effective/review date prior to the date of their current records. This section is typically only used upon implementation to record historical data. Changes to historical data can be made through the regular screens.

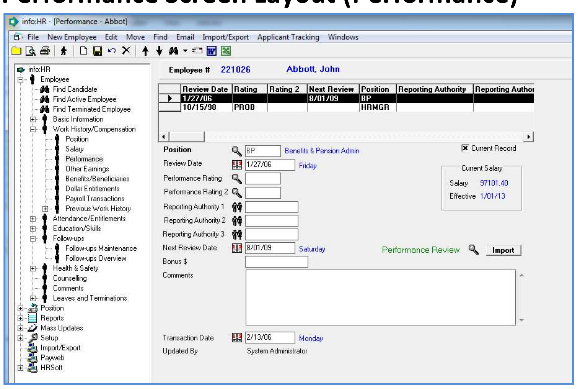
Position Screen Layout (Positon)



Salary Screen Layout (Salary)



Performance Screen Layout (Performance)

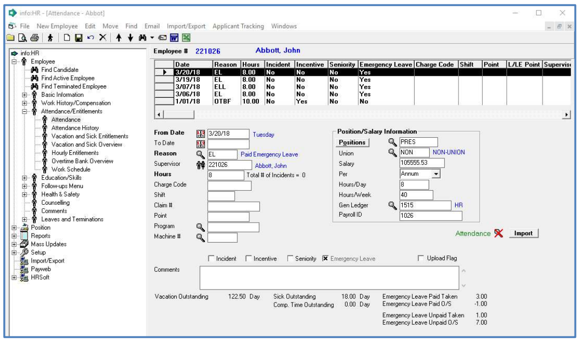


Attendance/Entitlements

Attendance

This screen captures all attendance records for the current year. Attendance data is entered either manually or automatically through an interface, ESS or Timesheets.

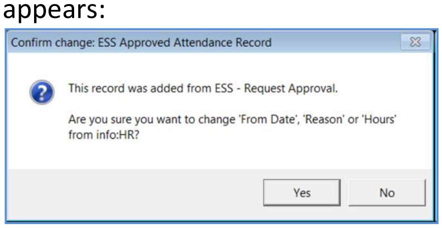
Screen Layout



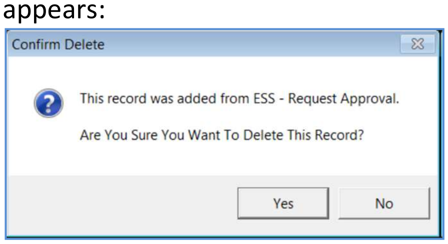
- To enter a new Attendance Record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Note: For clients using ESS

- All attendance records created with ESS have a “Source” code of ESSAP associated with them.
- If any records with Source ESSAP are changed in info:HR, the following message appears:



  - This is just a warning. Clicking Yes will change the info:HR record but *does not make any changes to the matching ESS record.*
  - Changes in ESS requests should be completed in ESS to be properly audited.
- If any records with Source ESSAP are deleted in info:HR, the following message appears:



  - This is just a warning. Clicking Yes will delete the info:HR record but *does not make any changes to the matching ESS record.*
  - All deletions in ESS requests should be completed in ESS to be properly audited.

Information Validation

Field	Purpose
From and To Date	Enter the dates relating to the record. For a single day, only the From Date needs to be entered. A From and To Date will create multiple attendance records using the same information that is entered below.
Reason	Enter the Reason or click on the magnify glass to select the code from the look up.
Supervisor	Will automatically populate based on the Employee's current Position's Reporting Authority #1. This value can be overridden if necessary.
Hours	Enter the hours associated with the code.
Charge Code	Provides the ability to attach a Charge Code to the attendance record.
Shift	Will automatically populate based on the Employee's current Position's Shift. This value can be overridden if necessary.
Claim #	Provides the ability to enter a Claim # number to the Attendance Code. There is no validation on this field. The user can enter any information desired.
Point	If the Reason entered has a point value assigned to it, the Point value displays here. The point value can be overridden if necessary.
Account Code	Enter the Account Code or click on the magnify glass to select the code from the look up.
Machine #	Enter the Machine # or click on the magnify glass to select the code from the look up.
Incident	This box is used if tracking "number of occurrences" in an Attendance Management program. The first day of the incident is checked. Subsequent days of the same incidents are not checked. info:HR's Attendance Reports can be used to track both absences and occurrences.
Incentive	If the Reason entered has incentive assigned to it, Incentive will be checked. The box can be overridden if necessary. There is no special logic associated with this item.
Seniority	If the Reason entered has seniority assigned to it, Seniority will be checked. The box can be overridden if necessary. This check box is used by organizations who track hours worked for seniority purposes.

Field	Purpose
Emergency Leave	If the Reason entered is for emergency leave, Emergency Leave will be checked. The box can be overridden if necessary. This check box is used if Emergency Leave tracking is required.
Upload Flag	Indicates where or not the record has been uploaded to payroll. Not all payroll interfaces use this feature.
Import	A doctor's note or any type of document can be attached to a specific Attendance Record using the **Import** button.

Vacation, Sick, Emergency Leave and Compensatory Time outstanding are automatically calculated and listed at the bottom of the screen for quick reference. Every calendar year, the compensatory time is recalculated to use only the values for the current year.

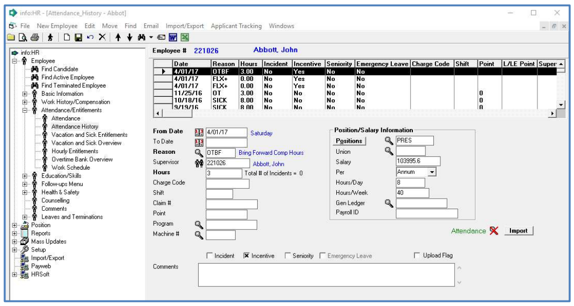
Buttons

Button	Purpose
+Another	Only appears when clicking the new icon. Clicking this button will save the current record and automatically increment the From Date by one day, repeating the remaining fields. This button can be clicked many times if entering a multi-day/same Reason request. This feature is a carry-over from an older version of info:HR and can be replaced by entering From Date and To Date in the date fields.

Attendance History

This screen is identical to the Attendance screen and is used to store previous year's attendance information. Data on this screen typically comes from the year end "Mass Update Attendance History" functions. New records can be entered if necessary. Any additions, changes or deletions entered in this area will not affect the employee's current year entitlement balances. If needed, the *Previous Year* Entitlement balance can be manually changed.

Screen Layout



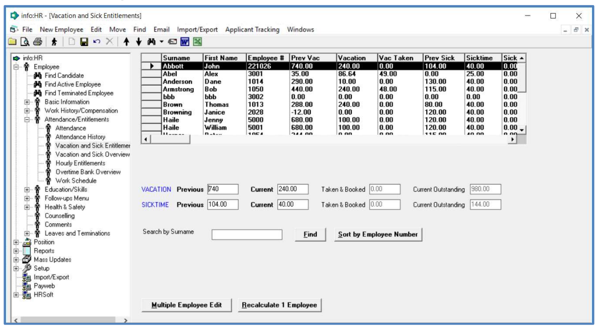
- To enter a new Attendance Record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation – Please refer to the Attendance documentation for informational validation rules.

Vacation and Sick Entitlement

Vacation and Sick Entitlements are displayed in a grid box for all employees. The selected employee's entitlements will appear in the in the entitlements section below the grid box. Entitlements are shown in hours only. The Vacation and Sick Overview has the ability to view the entitlement date range and to switch between hours and days. Manual adjustments can be made to an employee's previous and/or current entitlements. Adjustments cannot be made to the Taken column since this value is populated by the Attendance screen. Outstanding is an automatic calculation consisting of: Previous + Current - Taken = Outstanding.

Screen Layout



To view an employee's entitlements click on the employees name in the grid box. You can sort the grid box by clicking on the column heading; this will sort the list by that column in ascending order. Double clicking will sort in descending order.

- Example: To view alphabetically by first name click on the first name heading. A single click will filter the list a – z, double clicking will filter the list z – a.

To make adjustments to an employee's Previous and Current Entitlements select the employee and type the changes into the appropriate field. Click on the save icon button in the toolbar.

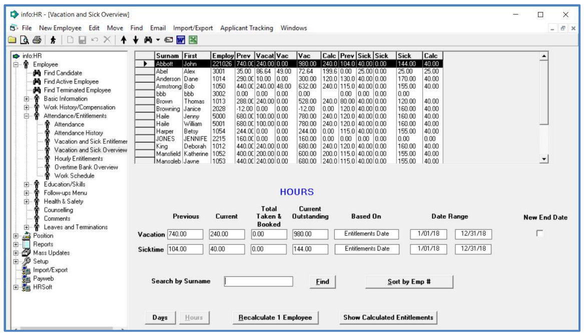
Buttons

Button	Purpose
Find	To find a specific employee, type their name, or part of, into the Search field and click on this button.
Sort by Employee Number	Provides the ability to sort the grid by employee name instead of employee surname. Once the list is sorted by employee number, the **Find** button will look up employees based on an Employee Number and not Surname.
Multiple Employee Edit	Provides the ability to type into the grid box on the top overwriting the entitlement columns. The "Taken" columns cannot be overwritten since they are calculated based on the Attendance Master. Once you have entered all the numbers, click on the save icon button in the toolbar.
Recalculate 1 Employee	Works like a refresh. If you wish to recalculate an employee's taken balance, select the Recalculate button. This has no effect on the Previous or Current balances. Taken is the sum of the attendance records.

Vacation and Sick Overview

This is a view only screen which shows employees' entitlements and the date range the entitlements are granted. These date ranges are populated by the Vacation and Sick Mass Update functions.

Screen Layout



To view an employee click on the employee's name in the grid box. You can sort the grid box by clicking on the column heading; this will sort the list by that column in ascending order. Double clicking will sort in descending order.

- Example: To view alphabetically by first name click on the first name heading. A single click will sort the list a – z, double clicking will sort the list z – a.

Buttons

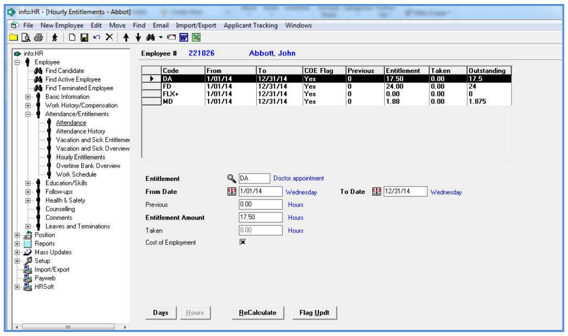
Field	Purpose
Find	To find a specific employee, type their name, or part of, into the Search field and click on this button
Sort by Emp#	Provides the ability to sort the grid by employee number instead of employee surname. Once the list is sorted by employee number, the **Find** button will look up employees based on an Employee Number and not Surname.
Days/Hours	Provides the ability to view the Entitlements in either hours or days. The "hours per day" is determined by checking the Hours per Day field on the employee's current Position record.
Recalculate 1 Employee	Works like a refresh. If you wish to refresh an employee's taken balance, select the Recalculate button. This has no effect on the Previous or Current balances. This button also rechecks the employee's Hours per Day as recorded on their current Position record.
Show Calculated Entitlements	This button will be greyed out unless you have your Vacation or Sick Mass Updates based upon a Monthly Accrual. If so, the Show Calculated Entitlements displays what the

Field	Purpose
	employee would earn in a full year.
New End Date	This can only be used on the Vacation Entitlement. It provides the ability to calculate an outstanding balance as of a given date. Only the *Taken* is recalculated. *Example*: If the normal end date is Dec. 31-13 and you enter a new End Date of May 31-13, the Taken will automatically be calculated by summing the attendance records from the beginning date up to and including May 31-13.

Hourly Entitlements

Hourly Entitlements are other paid time offs an employee is permitted to use. These paid time off may include vacation and sick or those entitlements may be tracked separately using their own function. Examples of other entitlements are: Float Days, Family Sick Days, Statutory Holidays, etc. The Hourly Entitlements Mass Updates function usually populates this screen or they can be manually entered by Entitlement/employee.

Screen Layout



- To enter a new Hourly Entitlement record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Entitlements	Is the Attendance Code that is used to track this entitlement.
From Date and To Date	Identifies the period of time in which the entitlement may be taken.
Previous	Is the amount of hours the employee carried from previous years.
Entitlement Amount	Is the amount of hours the employee is entitled to within the date range showing.
Taken	The system populates the *Taken* field by summing the Hours from the Attendance Master for the Entitlement code within the period of time identified in the From/To Date range.
Cost of Employment	Identifies that the cost of this entitlement will affect the employee's cost of employment.

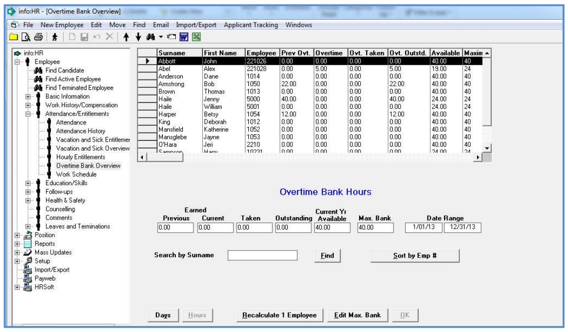
Buttons

Field	Purpose
Recalculate	This button reads the Attendance Master for the Entitlement/Date Range combination and computes the new Taken and Outstanding hours.
Flag Update	Changes the Cost of Employment flag to 'checked'

Overtime Bank Overview

Information on this screen is populated by the Overtime Bank Mass Update function. Employees cannot be added to this list. However, individual employee's maximum banks can be edited.

Screen Layout



Information Validation

Field	Purpose
Earned – Previous	Contains the number of hours that the Rollover Overtime Master calculated.
Earned – Current	Sum of all "OT" Attendance Reason Codes that fall within the Date Range.
Taken	Sum of all "CT" Attendance Reason Codes that fall within the Date Range.
Outstanding	Earned Previous + Earned Current – Taken
Current Yr. Available	Difference between the Maximum Bank and the Taken.
Max. Bank	Contains the number of hours that were set up in the Overtime Bank Master.
Date Range	Contains the Date Range that was set up in the Overtime Bank Master.

Buttons

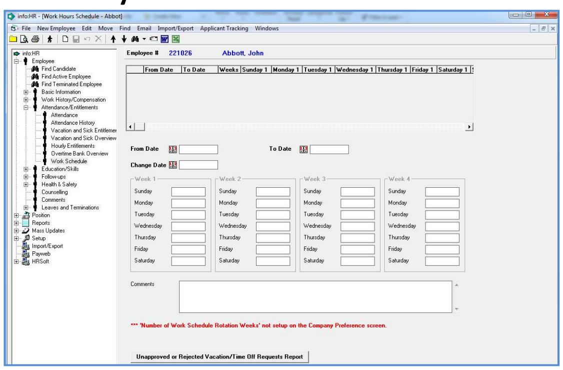
Field	Purpose
Find	To find a specific employee, type their name, or part of, into the Search field and click on this button.
Sort by Emp#	Provides the ability to sort the grid by employee number instead of employee surname. Once the list is sorted by employee number, the **Find** button will look up employees based on an Employee Number and not Surname.
Days/Hours	Provides the ability to view the Entitlements in either hours or days. The "hours per day" is determined by checking the Hours per Day field on the employee's current Position record.
Recalculate 1 Employee	If you wish to refresh an employee's *Taken* column, select the Recalculate button. This button also rechecks the employee's Hours per Day as recorded on their current Position record.
Edit Max Bank	Once the mass update is complete, you can change the Max Bank amount on an individual level if necessary.
OK	If the Max Bank pressed, click on this button to save the changes.

Work Schedule

A Work Schedule can be set up for part-time employees or full-time employees that do not work the same hours per day, every day. Only the ESS module has built-in logic that uses this feature. In Timesheets, an employee’s Hours per Day are displayed under the Date. There is no other validation performed.

Prior to entering an employee’s Work Schedule, you must identify which Employment Status codes are available to Work Scheduled employees. The employee must be assigned to the appropriate Status code before a Work Schedule can be created for this employee. Also, Work Schedule Rules, found in the Setup User Manual, must be created prior to using this function.

Screen Layout



- To enter a new Work Schedule record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
From To Dates	Enter in the date range for the Work Schedule.
Days (Saturday to Sunday)	Enter in the hours that correspond to the Days that the employee is scheduled to work.
Comments	Can be entered if necessary.

Buttons

Button	Purpose
Unapproved or Rejected Vacation/Time Off Requests Report	Prior to changing an employee’s Work Schedule, this button must be clicked and the report reviewed. If the Work Schedule changes and there are unapproved requests, the unapproved requests will not use the new Work Schedule hours. The requests should be deleted prior to changing the employee’s Work Schedule.

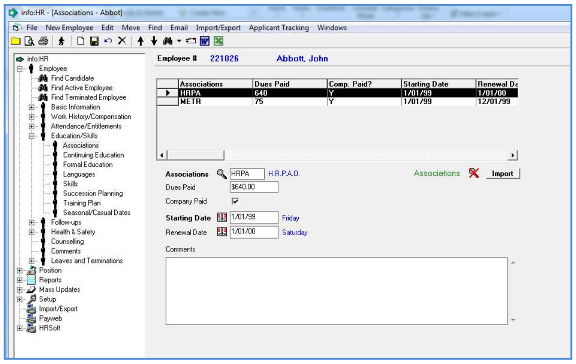
Education/Skills

The Education Skills section of the Employee menu contains all information relating to Education and Skills for each employee. This section can also be utilized to maintain Succession Planning and Training Plans.

Associations

This section tracks all professional associations an employee belongs to as well as the financial responsibility of the employee and organization.

Screen Layout



- To enter a new Association record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Association	Select the Association from the table using the magnify glass or enter the appropriate code.
Dues Paid	Enter in the amount of dues if applicable.
Company Paid	If the dues are paid by the organization, ensure Company Paid box is checked
Starting Date	Is the date the association membership commenced.
Renewal Date	Is when the dues are to be paid again, or the Association Membership must be renewed.
Comments	Enter notes as required.

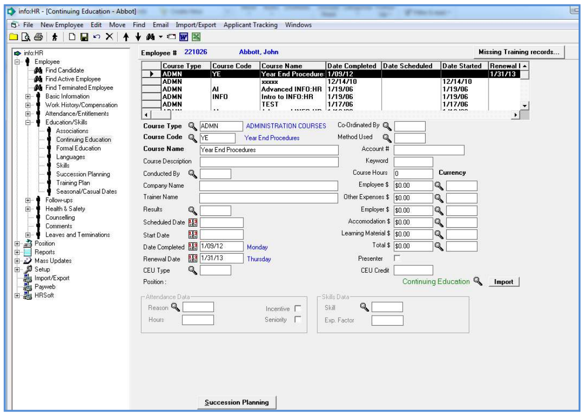
Buttons

Button	Purpose
Import	A document can be attached for each association record.

Continuing Education

Tracks all training courses the employee has taken within the organization and external courses or seminars. Attendance and Skill data for courses can also be tracked when entering new course information, saving the user the need to enter data into multiple screens.

Screen Layout



- To enter a new Continuing Education record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Course Type	Enter the Course Type or click on the magnify glass to select the code from the look up. Its purpose is to group Course Codes into groups. For example: Health & Safety is a Course Type and CPR would be a course code.
Course Code	Enter the Course Code or click on the magnify glass to select the code from the look up.
Course Name	By default, the Course Code's Description is displayed and can be overwritten by the user.
Course Description	This is a further description of the course.
Conducted By	Enter the Conducted By or click on the magnify glass to select the code from the look up. Examples include: Internal versus External or other defining factors useful to the organization.
Company Name	If external, name of company that provided the course.
Trainer Name	Name of the course trainer.
Results	Enter the Results or click on the magnify glass to select the code from the look up. Examples include: Pass, Fail, Attended or Recorded Mark.

Field	Purpose
Scheduled Date	Scheduled Date of course.
Start Date	For a multi-day course, center the date the course started.
Date Completed	Date the course was completed.
Renewal Date	If the course needs to be renewed in the future, enter a date, which will generate a Follow Up reminder. If the course is part of a Training Plan, the Renewal Date will be automatically created.
CEU Type	Enter the CEU Type or click on the magnify glass to select the code from the look up. CEU means Continuing Education Unit.
CEU Credit	CEU Credit.
Co-ordinated By	Enter the Co-ordinated By or click on the magnify glass to select the code from the look up. This value identifies the group or department who co-ordinated the course.
Method Used	Enter the Method Used or click on the magnify glass to select the code from the look up. This value identifies the method of training conducted. For example: e-Learning, classroom, etc.
Account Number	Contains an Account Number for financial reporting purposes.
Keyword	Keyword search code.
Course Hours	Length of course.
Employee $	Employee paid expenses.
Other Expenses	Additional expenses incurred. For example: Transportation, food, etc.
Employer	Employer paid expenses. For example: Cost of the course.
Accommodations	Expense costs related to accommodations.
Learning Material	Expense costs related to purchasing textbooks or learning materials.
Currency	Enter the Currency or click on the magnify glass to select the code from the look up. Each cost can have an associated currency code.
Total	Not entered by the user. This displays the sum results of the costs entered above.
Presenter	Provides the ability to identify whether or not the employee was also a presenter at the conference.

Buttons

Button	Purpose
Import	Provides the ability to import a certificate or document to attach to the record.

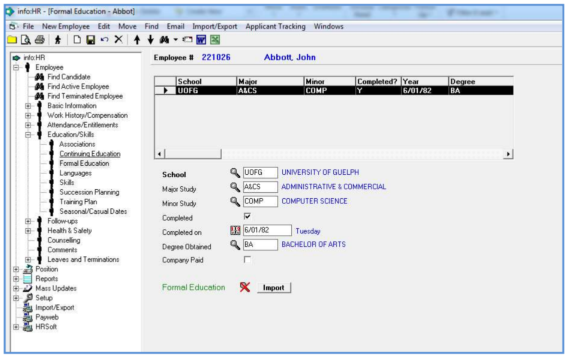
Entering Attendance or Skills Data:

- Select the Reason or Skill from the table.
- If in Attendance, enter in the hours the employee spent on the course.
- If in Skills, enter in *the Experience Factor* of that skill.
- Once you select **Save,** both Attendance and Skills Data will automatically be populated into the Attendance and Skills screens.

Formal Education

The Formal Education screen provides the ability to record all Formal Education for the employee. This could be a Degree, Diploma or Certificate.

Screen Layout



- To enter a new Formal Education record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
School	Enter the School or click on the magnify glass to select the code from the look up. For example: Actual school name may not be necessary. School may be University, College, etc.
Major Study	Enter the Major Study or click on the magnify glass to select the code from the look up.
Minor Study	Enter the Minor Study or click on the magnify glass to select the code from the look up. This field shares the same table value as Major Study.
Completed	Provides a check box to identify that a degree was obtained.
Completed On	Date study was completed/degree obtained.
Degree Obtained	Enter the Degree or click on the magnify glass to select the code from the look up.
Company Paid	Provides a check box to identify the organization paid for the education. When checked this will also add to the cost of employment

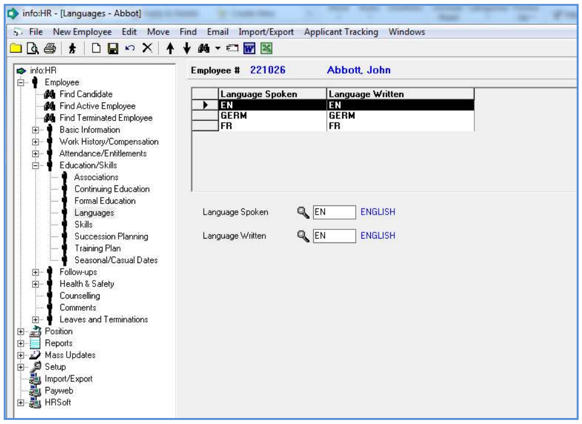
Buttons

Button	Purpose
Import	Provides the ability to attach a document to the record.

Languages

The Language section provides the ability to record languages spoken and written by the employee. an unlimited number of languages are allowed.

Screen Layout



- To enter a new Language record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

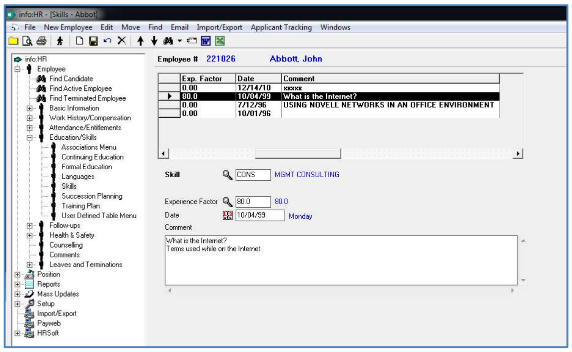
Information Validation

Field	Purpose
Language Spoken	Enter the Language or click on the magnify glass to select the code from the look up
Language Written	Enter the Language or click on the magnify glass to select the code from the look up.

Skills

The Skills section provides the ability to record various skills possessed by the employee. For each record you can also set an experience factor. Data in this section is used by the Skills Matching Report when reviewing employees for Succession Planning.

Screen Layout



- To enter a new Skill record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

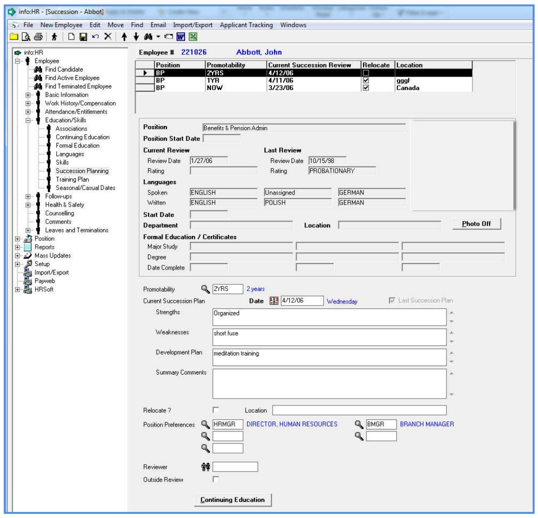
Information Validation

Field	Purpose
Skills	Enter the Skill or click on the magnify glass to select the code from the look up. Skill codes displayed use the same table values as the Position Skill Codes.
Experience Factor	Enter an experience factor or click on the magnify glass to select a code form the look up.
Date	Date skill was obtained. By default, the system selects today's Date.
Comment	Enter if needed

Succession Planning

This screen is used track succession planning data for an employee. The screen also shows the last two performance review ratings and languages written/spoken.

Screen Layout



- To enter a new Succession Planning record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

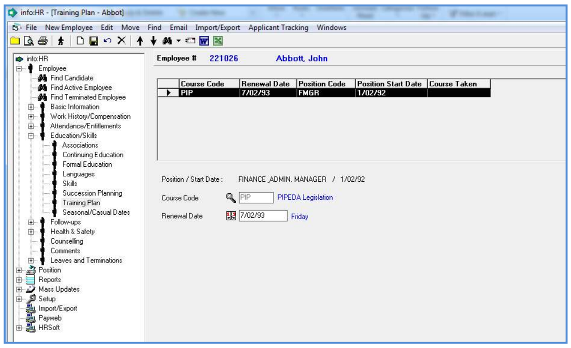
Field	Purpose
Promotability	Enter the code or click on the magnify glass to select the code from the look up. This code corresponds to the length of time the employee may be promotable to a new position.
Date	Enter the date the plan was created.
Strengths	List the employee's strengths.
Weaknesses	List the employee's weaknesses.
Development Plan	Enter a development plan.
Relocate?	Identifies whether or not this employee is willing to relocate.
Location	Identifies locations of preference for relocation.
Position Preferences	Enter the code or click on the magnify glass to select the code from the look up. Up to 5 different positions can be selected.
Reviewer	Provides the ability to record the individual who reviewed the plan with the employee
Outside Review	Provides the ability to record the individual who reviewed the plan with the employee.

Training Plan

This section provides the ability to set up Training Plans for employees. A Training Plan can be automatically adjusted based on the Course Code Master and the Position's Required Courses. Individual courses can be maintained here too. Courses with a Renewal Date prior to today will display the grid box details in **red**.

Both the Course Code Master, located under the Setup Menu item, and the Required Courses, located under the Position Menu item, must be completed in order to create a meaningful Training Plan.

Screen Layout



- To enter a new Training Plan record, click the new record icon button.
- To make changes to an existing plan select the plan from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the plan.

Information Validation

Field	Purpose
Position/Start Date	Displays the current Position and Start Date. If these values do not appear, the Course Code is not associated with the employee's current position and may have been manually assigned to the employee.
Course Code	Enter the code or click on the magnify glass to select the code from the look up. This information should come from the Required Courses for the employee's current Position. Otherwise, the Course Code can be manually entered.
Renewal Date	Enter the date when the course needs to be renewed. This information should come from the Required Courses for the employee's current Position. Otherwise, the Renewal Date can be manually entered or skipped if no renewal is required.

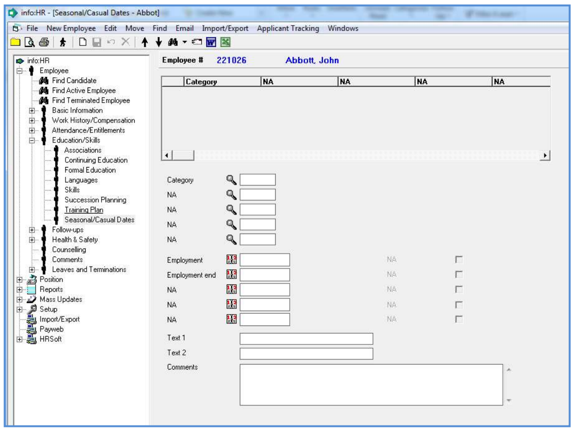
User Defined Table

This screen uses the Label Master. It provides the ability to track employee information that may not be tracked in other info:HR screens. There are five:

1. user defined tables
2. user defined flags
3. user defined dates

In addition to the above, text boxes and comments can be entered.

Screen Layout



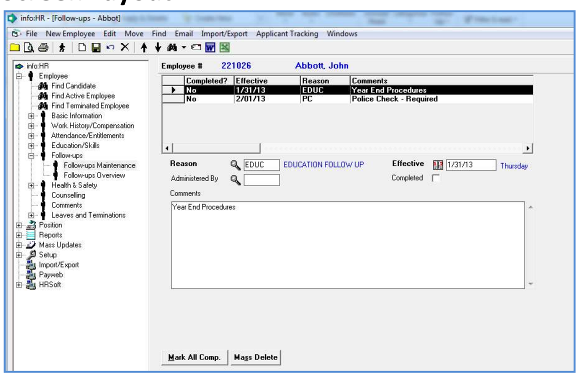
- To enter a new record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Follow-ups

Follow-Ups Maintenance

The Follow-Ups Maintenance screen is a history of all follow-ups that are specific to each employee. Many of these follow-ups are automatically generated from the system by entering renewal dates on items like: Performance Reviews, Continuing Education Reviews, Salary Reviews, health & safety, etc. This gives the status of each follow-up, listing whether it is completed or not. Additional follow-ups can be entered in this screen. The security on this screen is specific to each Follow-Up Reason Code. You can allow employees or supervisors to see some follow-ups, but not all. Refer to the Setup User Manual, Security Master for more details.

Screen Layout



- To enter a new follow up record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Reason	Enter the Reason or click on the magnify glass to select the code from the look up.
Effective Date	Date Follow-Up is due.
Admin By	Enter the Admin By or click on the magnify glass to select the code from the look up. By using this field, you can assign Follow- Ups to particular staff by assigning them an Admin By code.
Completed	When the Follow-Up is completed, check this box. Completed Follow-Up records will be hidden in the Follow-Up Overview screen.
Comments	Enter as necessary

Buttons

Button	Purpose
Mark All Comp.	Provides the ability to mark all follow-up records as complete.
Mass Delete	Provides the ability to delete all follow-up records listed.

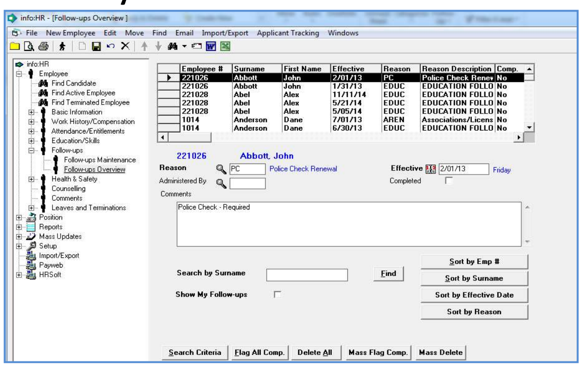
Follow-Ups Overview

The Follow-Up Overview screen can be considered a to-do list. Follow-Ups displayed are based on the **Search Criteria** saved for the local computer. Individual computers may have different search criteria. Generally, only incomplete Follow-Ups or Follow-Ups coming due within 'x' days are displayed.

By default, Follow-Ups are displayed by employee's last name only. The sort order can be changed by clicking on a sort button on the right of the screen.

The security on this screen is specific to each Follow-Up Reason Code. You can allow employees or supervisors to see some follow-ups, but not all. Refer to the Setup User Manual, Security Master for more details.

Screen Layout



Buttons

Button	Purpose
Find	Will search for the set criteria.
Sort By Emp#	Provides the ability to search by employee number.
Sort By Surname	Provides the ability to search by employee surname.
Sort by Effective Date	Provides the ability search by date.
Sort by Reason	Provides the ability to search by reason code.
Search Criteria	Defines when this screen is displayed and what Follow-Ups will appear in the display.
Flag All Complete	Will mark all Follow-Ups as complete and remove them from the Overview screen.
Delete All	Will delete all Follow-Ups from the system.
Mass Flag Complete	Can select multiple Follow-Ups and mark them complete.
Mass Delete	Can select multiple Follow-Ups and delete them.

Health and Safety

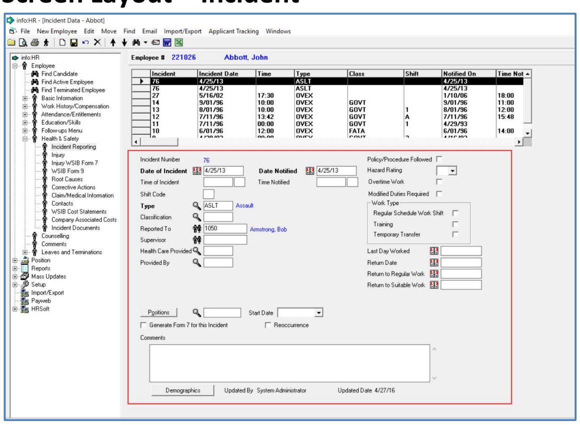
The Health and Safety section of the Employee Menu is where all of the information relating to Health and Safety is recorded for employees. In this section you will be able to record all manner of injuries, root causes and WSIB costs. If you have info:HR's Form 7/Form 9 Module, you are also able to create WSIB Form 7 and Form 9 documents, which can be printed and submitted.

Incident Reporting

For every incident, the details of the incident should be recorded. An incident does not mean that the employee will have an injury or a claim. You may wish to record that an incident occurred regardless of the consequences. The top of the screen displays a gird box containing all of the recorded incidents for the employee. The bottom of the screen contains the information regarding the incident that is highlighted.

Click on the Hand to move to the other screens. The other screens can also be accessed from the side menu item under Health & Safety. **Important**: Until the save icon is clicked, data is not saved. Please ensure that you save each screen before proceeding to the next screen.

Screen Layout – Incident



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record. Deleting an incident deletes <u>all data and attachments associated with the incident number.</u>

To use this screen:

- Mandatory data, fields bolded, must be entered.
- Enter remaining fields as deemed necessary based on the incident being reported.
- At the time of the incident, if the employee was doing a job different that their current position, select the Position from the lookup and enter the date that they started working in that position.

To use this screen:

- If the incident requires a Form 7, check the Generate Form 7 box. Note: Any functions related to Forms 7 & 9 are available only if the Form 7/9 Generator module has been purchased through info:HR.
- If the Form 7 is a reoccurrence from a previously generated Form 7, click on the Reoccurrence box.

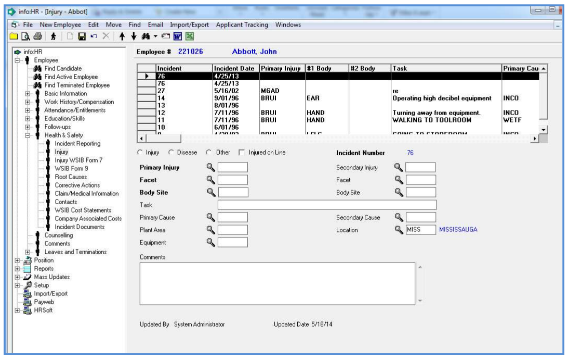
Buttons

Demographics – Provides the ability to view and make changes to the employees Demographics information.

Injury (non Form 7)

This screen is displayed if info:HR's Form 7/Form 9 module has not been purchased or if the incident recorded in the Incident screen did not require a WSIB form to be created. Data stored on this screen updates the health and safety incident table that was created in the Incident screen. The new record icon button and the delete icon button are not active.

Screen Layout – Injury (non Form 7)



- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button.

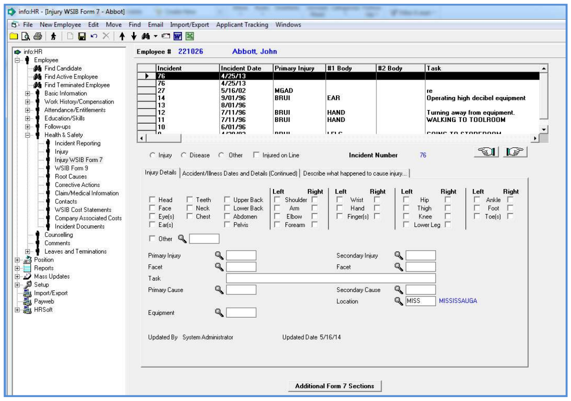
To use this screen:

- Mandatory data, fields bolded, must be entered.
- Enter remaining fields as deemed necessary based on the incident being reported.

Injury WSIB Form 7

This section provides the ability on enter specific information required by a WSIB Form 7, and generate the WSIB Form 7 for submission. There are multiple tabs to be completed including the tabs under the **Additional Form 7 Sections** button. Prior to entering any Form 7 employee information, the Form 7 master information must be completed under the Setup menu item. Refer to the Setup User Manual for details.

Screen Layout – Injury Form 7

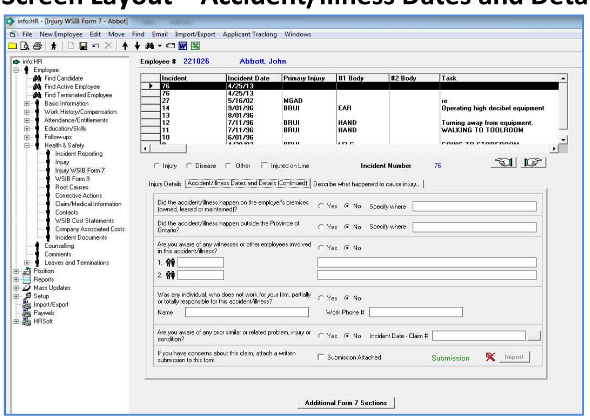


- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button.

To use this screen:

- Mandatory data, fields bolded, must be entered.
- Enter remaining fields as deemed necessary based on the incident being reported.
- To select a different tab, click on the tab name.
- Click on Additional Form 7 Sections to complete all Form 7 sections prior to saving this screen.

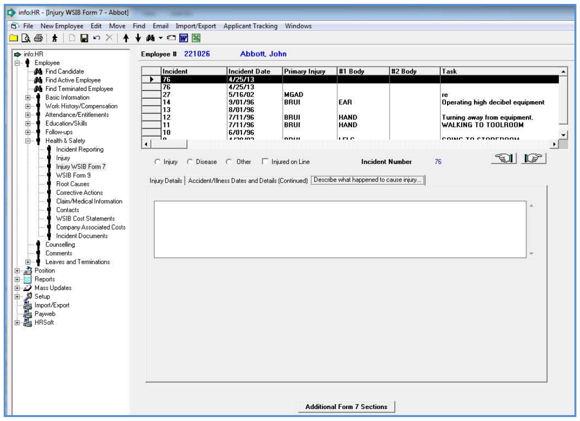
Screen Layout – Accident/Illness Dates and Details



- Click on the save icon button prior to proceeding to the next tab.

Screen Layout – Describe what happened to cause the injury…

Provides the ability to record details about the injury.

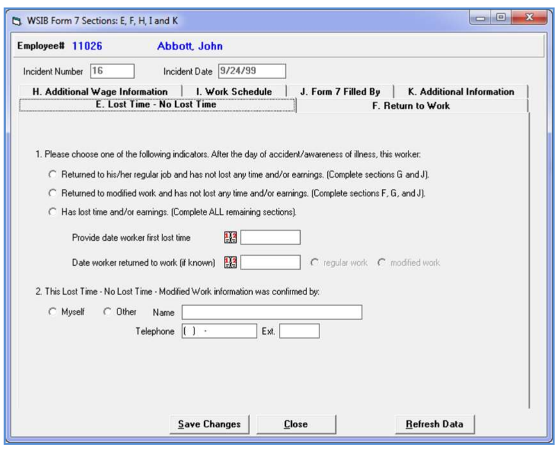


- Click on the save icon button prior to clicking the Additional Form 7 Sections.

Additional Form 7 Sections

Screen Layout – E. Lost Time – No Lost Time

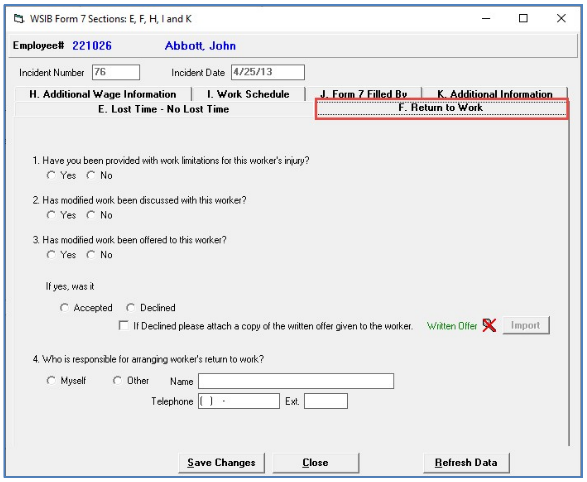
This screen provides the ability to record information regarding lost time or no lost time against the incident.



- Once completed, click on the **Save Changes** button.
- The **Refresh** button removes all unsaved changes.
- Click on **Close** when completed.

Screen Layout – F. Return to Work

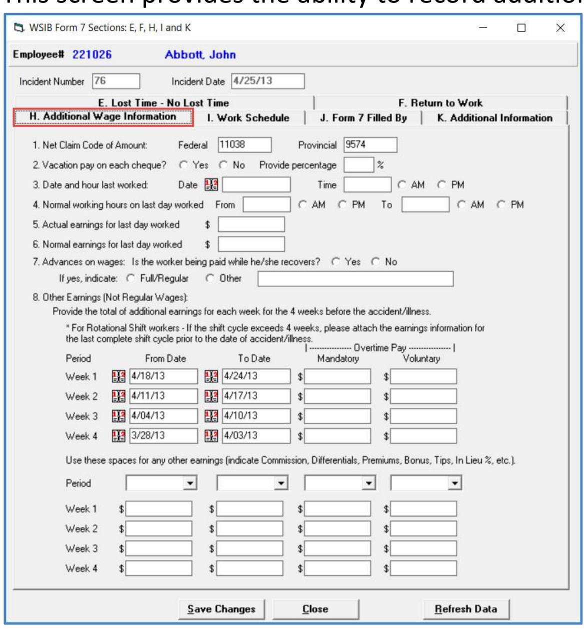
This screen provides the ability to record and store information regarding the return to work plan.



- Once completed, click on the **Save Changes** button.
- The **Refresh** button removes all unsaved changes.
- Click on **Close** when completed.

Screen Layout – H. Additional Wage Information

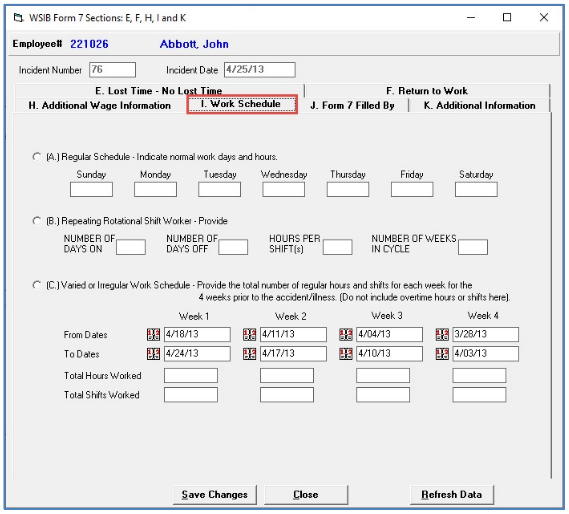
This screen provides the ability to record additional wage information.



- Once completed, click on the **Save Changes** button.
- The **Refresh** button removes all unsaved changes.
- Click on **Close** when completed.

Screen Layout – I. Work Schedule

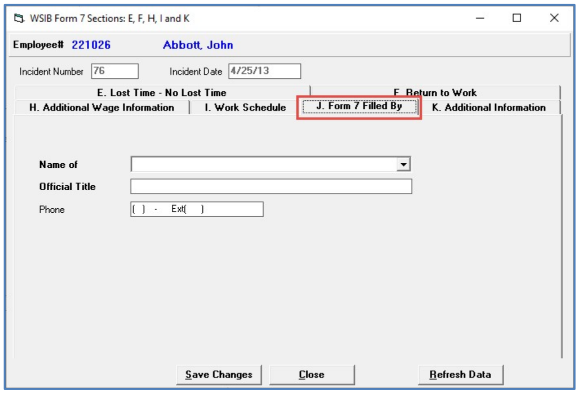
This screen provides the ability to store work schedule information.



- Once completed, click on the **Save Changes** button.
- The **Refresh** button removes all unsaved changes.
- Click on **Close** when completed.

Screen Layout – J. Form 7 Filled By

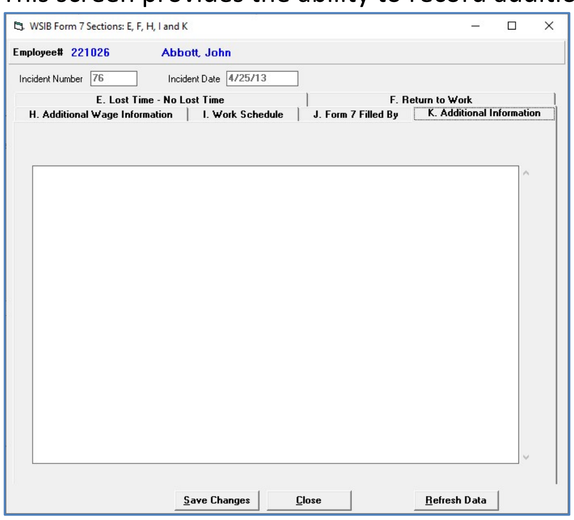
This screen provides the ability to record information regard the person completing the Form 7.



- Once completed, click on the **Save Changes** button.
- The **Refresh** button removes all unsaved changes.
- Click on **Close** when completed.

Screen Layout – K. Additional Information

This screen provides the ability to record additional information regarding the incident.

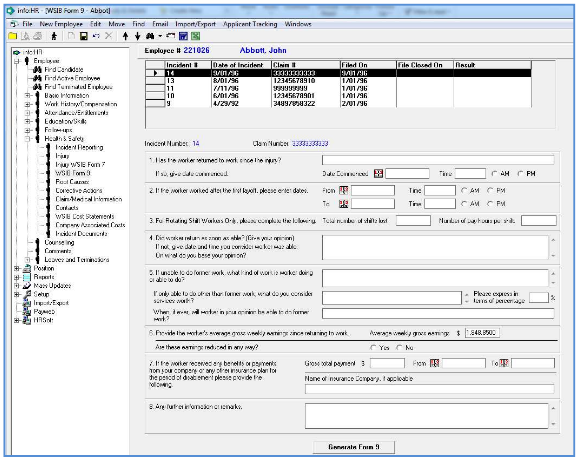


- Once completed, click on the **Save Changes** button.
- The **Refresh** button removes all unsaved changes.
- Click on **Close** when completed.

WSIB Form 9

This section provides the ability on enter specific information required by a WSIB Form 9.

Screen Layout

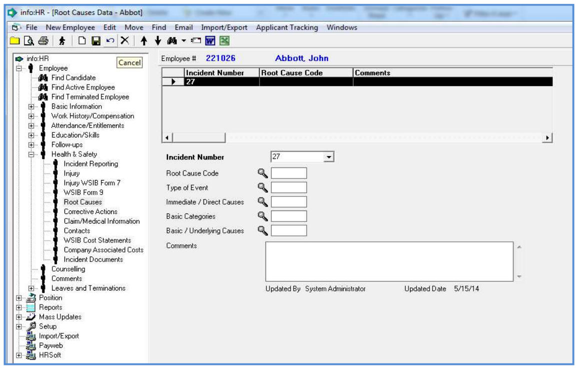


- Once the information is entered, click on **Generate Form 9** to print the form.
- An electronic copy of the form is stored under Health & Safety Incident Documents.

Root Causes

This screen is completed after an investigation of an incident has occurred and the Health & Safety Committee has identified reasons for the incident.

Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

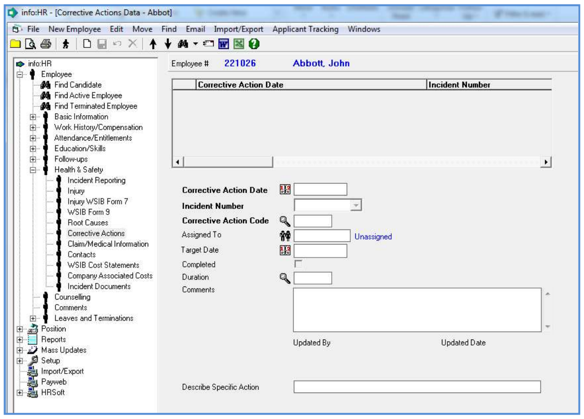
Information Validation

Field	Purpose
Incident Number	Provides the ability to select an existing Incident.
Root Cause Code	Enter the code or click on the magnify glass to select the code from the look up.
Type of Event	Enter the code or click on the magnify glass to select the code from the look up. Under the Setup menu, a matrix can be created that will link Type of Events with their matching Immediate/Direct Causes.
Immediate/Direct Causes	Enter the code or click on the magnify glass to select the code from the look up. Under the Setup menu, a matrix can be created that will link Immediate/Direct Causes with their matching Basic Categories.
Basic Categories	Enter the code or click on the magnify glass to select the code from the look up. Under the Setup menu, a matrix can be created that will link Basic Categories with their matching Basic / Underlying Causes.
Basic/Underlying Causes	Enter the code or click on the magnify glass to select the code from the look up.
Comments	Provides the ability to enter comments.

Corrective Actions

This screen is populated after an investigation of the incident has occurred and the Health & Safety Committee has identified correct actions that are required to avoid the incident happening again.

Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

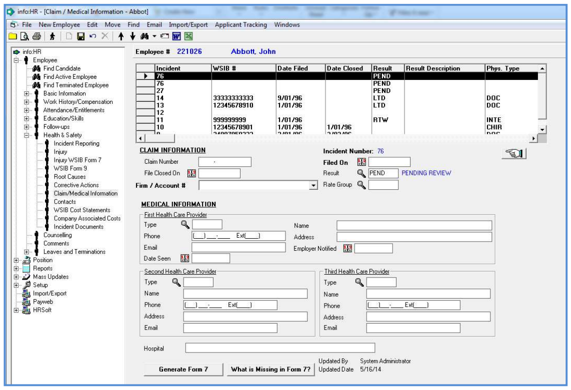
Information Validation

Field	Purpose
Corrective Action Date	Provides the ability to enter the date the corrective action should start.
Incident Number	Provides the ability to select an existing incident.
Corrective Active Code	Enter the code or click on the magnify glass to select the code from the look up.
Assigned to	Provides the ability to enter the employee who is responsible to complete the corrective action.
Target Date	Provides the ability to enter a target date for completion.
Completed	Provides the ability to check the corrective action as completed.
Duration	Enter the Duration or click on the magnify glass to select the code from the look up.
Comments	Provides the ability to enter comments.
Describe Specific Action	Provides the ability to enter more detail.

Claim Medical Information

This section is used to document medical information regarding an incident. This is also accessible through the Incident Reporting section.

Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

To use this screen:

- Mandatory data, fields bolded, must be entered.
- Enter remaining fields as deemed necessary based on the incident being reported.
- **Buttons**

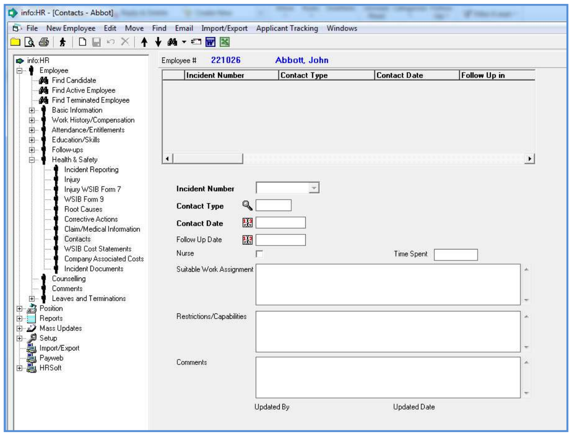
Button	Purpose
Generate Form 7	Provides the ability to generate a Form 7. An electronic copy of the form is stored under Health & Safety Incident Documents.
What is Missing in form 7	Provides the ability to view what information is missing from the Form 7 prior to generating the Form 7.

Note: These buttons are available only if the Form 7/9 Generator module has been purchased through info:HR.

Contacts

The purpose of this screen is to record all contact that occurs against the incident. If a Follow-Up Date is entered, the system automatically creates a Follow-Up record as a reminder.

Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

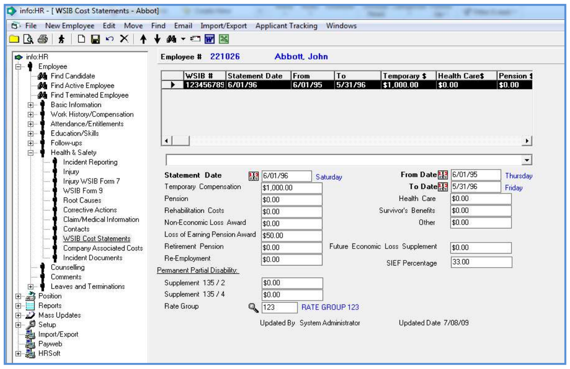
Information Validation

Field	Purpose
Incident Number	Provides the ability to select an incident.
Contact Type	Enter the Type or click on the magnify glass to select the code from the look up.
Contact Date	Provides the ability to enter a date of contact.
Follow up Date	Provides the ability to enter a follow up date to create a reminder.
Nurse	Provides the ability to check if the employee was seen by a company nurse.
Time Spent	Provides the ability to enter the time taken for the contact.
Suitable Work Assignment	Provides the ability enter notes and comments.
Restrictions/Capabilities	Provides the ability to enter notes on the restrictions and capabilities.
Comments	Provides the ability to enter comments.

WSIB Cost Statements

Depending upon whether you are NEER 1 or NEER 2, select the appropriate screen.

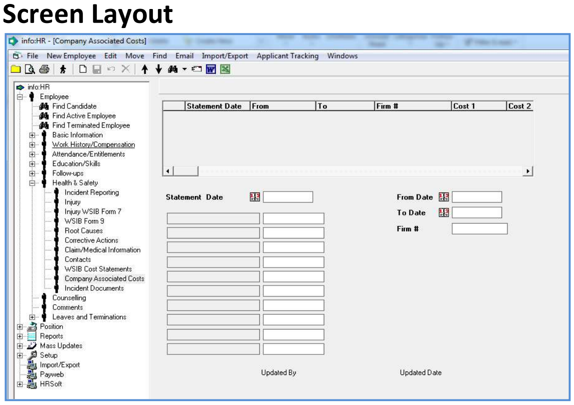
Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Company Associated Costs

Screen Layout

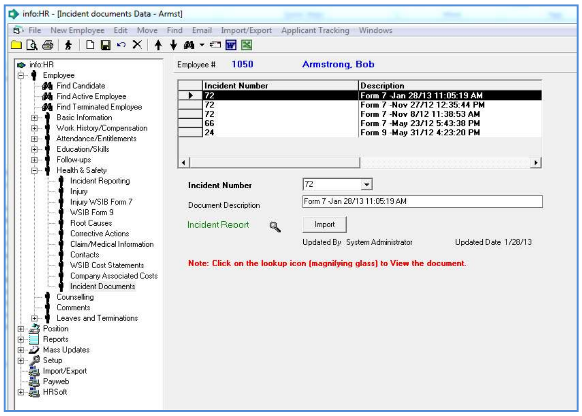


- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.
- On this screen, the user has the ability to enter labels associated with the dollar amount to the right. The labels will be determined based upon your cost statement and must be entered on every new entry.

Incident Documents

This area provides the ability to attach unlimited documents per incident. The “Document Description” is the English description of the attachments. All system generated Form 7 and Form 9 documents are stored here too. Multiple versions of Form 7 and Form 9 documents may be displayed based on the number of times the user wanted to change and reprint the document.

Screen Layout



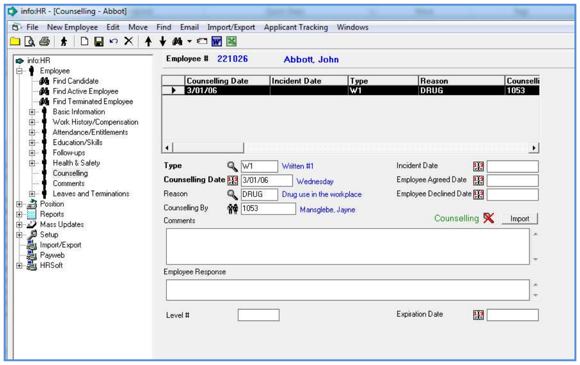
- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. C lick on the save icon button or the delete icon button to delete the record.
- To view documents, click on the magnify glass .
- **Buttons**

Button	Purpose
Import	Provides the ability to attach a document to the record.

Counselling

This section is used to maintain counseling information for employees.

Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Type	Enter the Type or click on the magnify glass to select the code from the look up.
Counselling Date	Provides the ability to enter a date.
Reason	Enter the Reason or click on the magnify glass to select the code from the look up.
Counselling By	Provides the ability to enter the employee who performed the counselling.
Incident Date	Provides the ability to enter the date of the incident.
Employee Agreed Date	Provides the ability to enter an employee agreed date.
Employee Declined Date	Provides the ability to enter an employee decline date.
Comments	Provides the ability to enter comments.
Employee Response	Provides the ability to enter employee comments.
Level#	Provides the ability to enter a level reference.
Expiration Date	Provides the ability to enter an expiry date on the record.

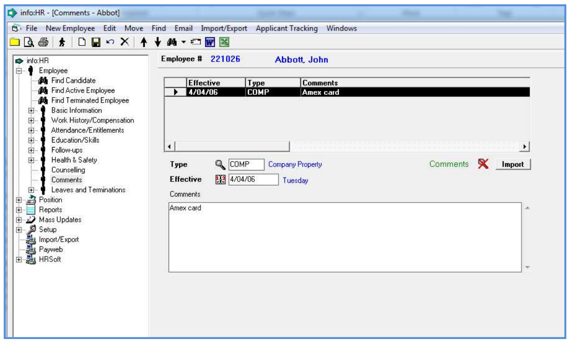
Buttons

Button	Purpose
Import	Provides the ability to import a document.

Comments

The Comments section can be used to track anything. Some examples are Company Assets or Personal Records not already tracked in info:HR. The security on this screen is specific to each comment type. You can allow employees or supervisors to see some comments, but not all. Refer to the Setup User Manual, Security Master for more details.

Screen Layout



- To enter a new incident record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Type	Enter the Type or click on the magnify glass to select the code from the look up.
Effective	Provides the ability to enter a date.
Comments	Provides the ability to enter comments.

Buttons

Button	Purpose
Import	Provides the ability to import a document.

Leaves and Terminations

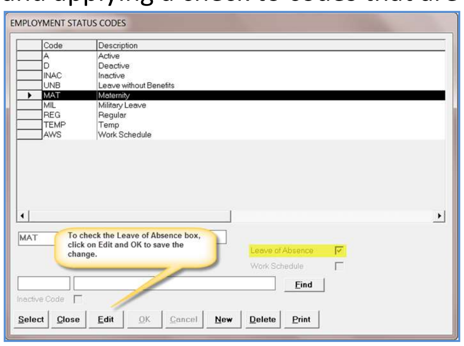
This section provides the ability to process various types of leaves or termination. It is important to use this procedure when processing an employee leave of absence. This procedure will ensure that the employee's records are administered properly.

Enter a Leave

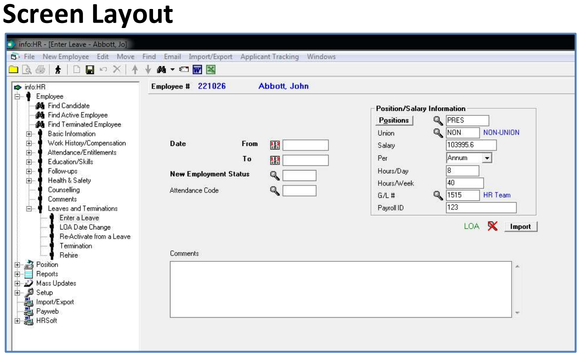
The enter a leave section is where a leave of any type should be processed in info:HR. Using this procedure updates:

1. Employee's Status/Dates
2. Employee History
3. Attendance Master (optional)
4. Follow Up Master

In order to use this function, Employment Status codes must be identified as codes pertaining to "leave of absences". This setting can be found by opening the Employment Status code lookup and applying a check to codes that are considered leave codes. Refer to screen shot below:



Screen Layout



- Click on the save icon button to process the leave.

Information Validation

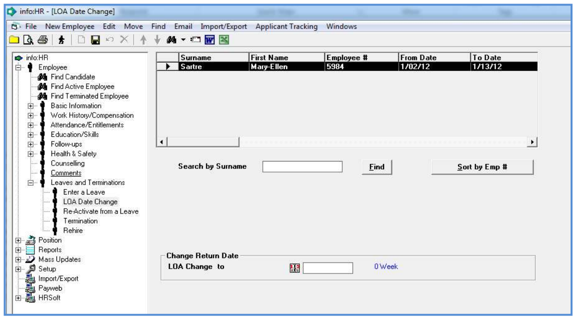
Field	Purpose
Date From	Enter the beginning of the leave.
Date To	Enter the end date or projected end date of the leave.
New Employment Status	Enter the Status or click on the magnify glass to select the code from the look up. Status code must be marked

Field	Purpose
	as a “Leave”.
Attendance Code	Enter the code or click on the magnify glass to select the code from the look up. If entered, the Attendance Master is updated.
Comments	Enter Comments or notes as required.

LOA Date Change

This section provides the ability to modify or alter the To Date of a leave of absence. If an employee needs to extend or shorten their leave, it is important to enter that change here. If the leave was entered with a projected end date and the projected end date needs to be revised, enter the new date here. This automatically updates the Status and Dates and Follow-Up screens. If an attendance code is used when initially entering the leave, the Attendance Master will be updated with the change.

Screen Layout



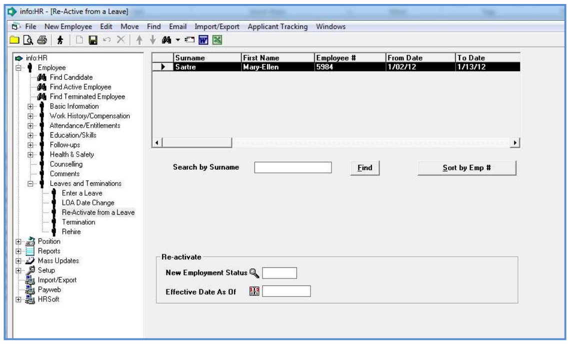
- To make a change, locate the employee from the table and select
- Once their name is highlighted, you can then change the date by selecting a new date using the calendar.
- Click on the save icon button to process the leave.

Reactivate From a Leave

This section provides the ability to reactivate an employee from a Leave of Absence which will:

1. Update the Employment Status and date ranges on the Status/Dates screen.
2. Update Employee History with the status change.
3. Mark the Follow-Up record as 'complete'.

Screen Layout

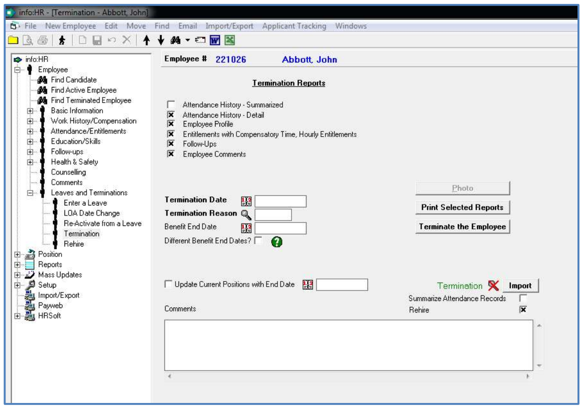


- To reactivate an employee, select the employee from the table.
- Once their name is highlighted, enter their New Employment Status or use the lookup to select the code.
- Enter the Effective Date of the return.
- Click on the save icon button to process the leave.

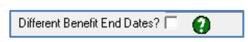
Termination

This provides the ability to terminate employees from the system. Once an employee is terminated the information is viewed through the Terminated Employee section of Info:HR. Terminated employees reduce the 'active' headcount from your license. Prior to terminating the employee, a selection of reports can be printed for storage in the employee's file. Only the Employee Profile is the recommended report to run.

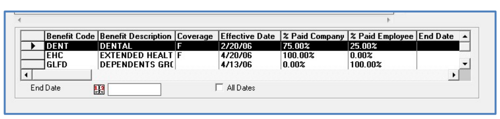
Screen Layout



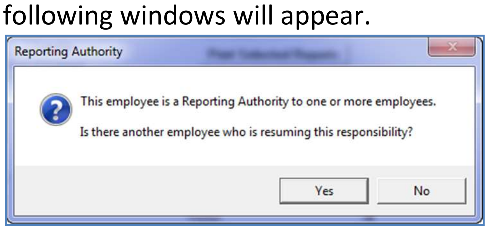
To use this screen:

- Check off the selected reports you wish to print prior to the termination. If you do not want any reports, go to the next step.
  - Click **Print Selected Reports**
- Enter the Termination Date and Reason. The Reason can be looked up by clicking on the magnify glass.
- If there is an interface to an insurance carrier system, enter the Benefit End Date.
  - Click **Different Benefit End Dates?** Check box. 

  - The Qeustion mark displays a description of the check box purpose.

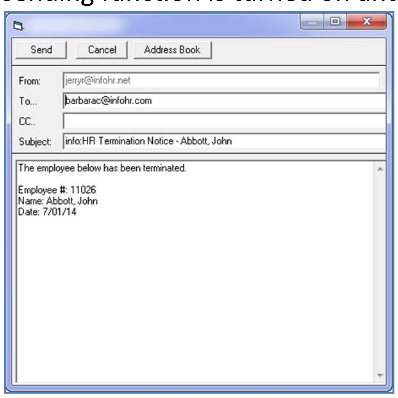


  - Highlight the Benefit and enter the end date.
  - Click **Terminate the Employee**
- If no termination reports were printed, the system will want you to confirm whether to proceed with the termination without running the reports. Otherwise, you will be asked to confirm the termination.
- If the employee being terminated is a Reporting Authority of any other employee the following windows will appear.



- Clicking **Yes** provides the ability to assign a new Reporting Authority to all employees reporting to the employee being terminated.

  - Enter/select the New Reporting Authority and click **OK**.
  - The employee will be terminated and all employees whose Reporting Authority 1 through 4 matched the terminated employee will have their Reporting Authorities changed to the employee entered in the screen above.
  - To exit without changing the Reporting Authority, click on **Cancel** and answer **Yes** to continue with the termination without changing the Reporting Authority. The terminated employee number will be removed from any Reporting Authorities.
- Clicking **No** will terminate the employee and remove all references of the terminated employee's employee number under the Reporting Authorities.
- Once all confirmations have been accepted, the termination will proceed. If the Email sending function is turned on and email window will appear.



- Click **Send** to send the email, **Cancel** to exit without sending, and **Address Book** to access your Outlook address book enabling you to add recipients to the email.
  Note: This window allows the user to modify the email prior to sending.

Buttons

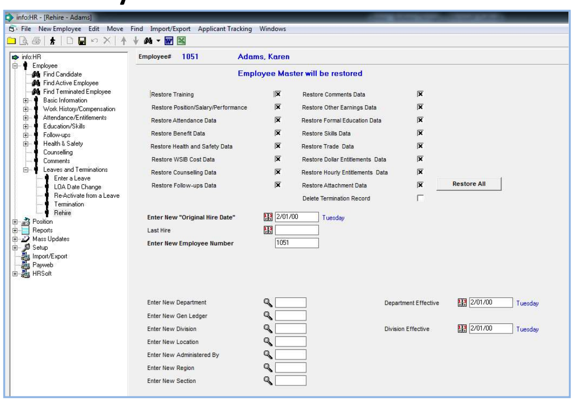
Button	Purpose
Photo Off	Will remove the display of the employee photo.
Print Selected Reports	Will send all of the reports to the printer.
Terminate the Employee	Will process the termination.
Import	Provides the ability to attach a document to the termination record.

Rehire

Employees previously terminated can be rehired and their selected employee records restored. An employee may appear more than once in the list of terminated employees. This would happen if the employee has been rehired and terminated more than one time. For example: seasonal employees are terminated at the end of the season and may be rehired for the next season. When selecting an employee for rehire, make sure that the latest termination record is selected. To assist with the proper selection, click on the 

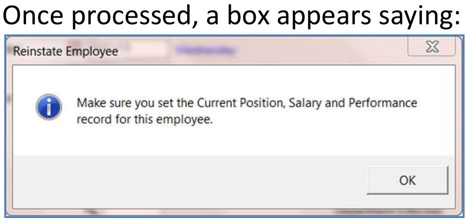
check box. This hides all employee records that were previously rehired.

Screen Layout



To use this screen:

- Select an employee from the terminated list.
- You have the ability to restore their employee file. Check the boxes of the information you wish to restore.
- If you wish to delete the termination record, ensure *Delete Termination Record* is checked. This should only happen if you are rehiring someone who may have been accidently terminated and you want to remove the trace from the termination files.
- The system defaults to bring back their *Original Date of Hire* and *Employee Number*. Change the information as needed.
- If you wish to use their current Rehire date as their *Last Hire* date in the Status/Dates screen, enter the Last Hire.
- New Demographic data can be entered as well. These changes can be done at time of Rehire or during subsequent employee master file maintenance.
- Click on the save icon  button to process the rehire.
- You will need to confirm the rehire prior to the transaction being processed.
- Once processed, a box appears saying:



  - Click **OK** to proceed and then open the rehired employee's position, salary and performance record to assign them a new position and salary.