

HR Generalist Training Agenda 2 Hour Online Course

Employee Manager Workspace

- Explanation of hot keys
 - Using the navigation toolbar
 - How to get the most out of the employee finder
- Employee Window (in order of the new hire process)
 - Personal information tab
 - New employee
 - Add/remove a picture
 - Delete employee
 - Contact tab
 - Employment tab
 - Job tab
 - Setting up a supervisor
 - OSHA tab
 - OSHA Status
 - Summary report
 - Dependents tab
 - Other tab
 - Updated Veteran status
 - Notes and attachments tab
- Compensation window
 - Compensation tab
 - View/change compensation
 - Calculation tab
 - Compa-ratio tab
 - Comments tab
 - What if tab
 - Use this
 - Review tab
 - Review wizard
 - View/edit history
 - Bonus tab
 - Review wizard
 - View/edit history
 - Benefits compensation tab
 - Taxes tab

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- Direct deposit tab
- Benefits window
 - Enrollment tab
 - How to enroll
 - Show enrollment history
 - Change/view/delete options
 - Recalc button
 - Eligibility tab
 - Override eligibility
 - View eligibility calculations
 - Other insurance tab
 - Providers tab
 - Beneficiaries tab
 - Billing adjustments tab
- Attendance window
 - Summary tab
 - Start a leave type
 - Stop/delete a leave type
 - View calcs
 - Leave taken tab
 - Record time off and adjustments
 - Brief summary of online leave requests through self-service
- Termination wizard
- COBRA/HIPAA
 - Coverage and continuation summary
 - Print notices
 - Post a COBRA election
 - Post COBRA payments
 - Notices log
 - How to show COBRA active
 - How to end COBRA election
- Report Wizard
 - Walk through a standard report
 - Set criteria within the report wizard
 - Create summary report
 - Create a custom report

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- Export report to file
- Save a report as a PDF
- Modify/print a saved report
- Organizational chart data for Visio
- Employee self-service administration
 - Accounts tab
 - Enable/disable user accounts
 - Generate/re-set user passwords
 - Send account info using correspondence wizard
 - New hire enrollment vs open enrollment
 - Monitor the open enrollment/new hire enrollment status
 - Approve/reject pending changes
 - Leave time off request system process
 - Review the self-service logs
- Employee correspondence wizard
 - Create a correspondence batch
 - Select fields for insert
 - Choose recipients
 - Choose a delivery method
 - Modify/Organize/Run saved batches
- Online help documentation