

### Training Agenda Day 1

#### Employee Manager

##### Getting Around

- Explanation of toolbar buttons
- Introduction to the menu
- Hot keys
- Introduction to the navigation toolbar
- How to get the most of out of employee finder

##### The Employee workspace

- Personal information tab
  - New employee
  - Add/remove a picture
  - Delete employee record
  - Termination wizard
- Employment tab
  - Termination wizard results
  - How to re-hire an inactive employee
- Job tab
  - Setting up a supervisor
- Contact tab
- OSHA tab
- Dependents tab
- Other tab
- Notes and attachments tabs

##### The Compensation workspace

- Viewing/changing compensation
  - Calculation tab
  - Compa-ratio tab
  - Comments tab
  - "What If" and "Use This" features
- Review information
  - Review wizard
  - Bonus tab
- Benefits compensation tab
- Taxes tab
- Direct deposit tab

##### The Benefits workspace

- Enrollment information
  - How to enroll employees in benefit plans
  - Showing enrollment history
  - Change/view/delete options
  - Recalc button
- Using the "Batch enrollment" wizard
- Brief explanation of "Online enrollment" using self-service (Complete training on Day 3)
- Eligibility tab
  - Overriding eligibility
  - Viewing eligibility calculations

- Other insurance tab
- Providers tab
- Beneficiaries tab
- Billing adjustments tab
  - Remittance report

### Attendance workspace

- Summary tab
  - Starting up leave
  - Stopping/deleting a leave
  - Viewing calcs
- Leave taken
  - Recording time off and adjustments
  - Brief summary of online leave requests through self-service
- FMLA

### The COBRA process

- Coverage and continuation summary
- Printing notices
- Posting a COBRA election
- Posting a COBRA payment
- Viewing the notices log

### Entering/maintaining OSHA cases

- Within the employee workspace
- Globally from utilities/OSHA status
- Summary report

### Employee Correspondence Wizard

- Creating a correspondence batch
  - Selecting fields for insert
  - Choosing recipients
  - Choosing a delivery method
- Modifying, organizing and running saved batches
- Using with Custom Tab information

### Reporting

- Walking through a standard report
  - Setting criteria within the report wizard
  - Creating a summary report
- Create a custom report using report wizard
- Exporting a report to file
- Saving a report as a .pdf
- How to modify/print a saved report
- Organizational chart using Visio

### Training Agenda Day 2

#### Setup Manager

##### Getting Around

- Explanation of toolbars and menus
- Hot keys
- How to use the online documentation
- The setup menu
  - Reason codes
  - Type/status codes
  - Taxes
  - Direct deposits
  - Payroll codes

##### Security

- License tab
  - Users and roles
  - Setting & resetting user's passwords

##### Company information

- General tab
- Locations/divisions/departments tabs
- Job titles tab

##### Review and bonus setup

- Creating a performance review policy
- Defining bonus types

##### Setting up compensation plans

- Creating pay grade levels
- Making changes to compensation plans

##### Benefit Setup Wizard - Modifying an Existing Plan

- Eligibility rules
- Creating an open enrollment period
- Changing rates
- Exporting/importing a plan
- Ending a plan vs. Deleting a plan
- Bookmarking

##### Benefit Setup Wizard - Creating new Benefit Plans

- Dental plan type
- LTD/STD plan type
- Retirement plan type
- Section 125 plan type
  - Healthcare reimbursement
  - Dependent care
  - Premium conversion
- Creating an "Other" (custom) plan type

##### Attendance setup wizard

- Creating a new leave type
  - Accruing vs. Non-accruing
- Modifying an existing leave type
  - Modifying a current policy vs. Implementing a new policy

- Deleting a leave type
- Setting up FMLA
- Changing leave unit configuration (days or hours)
- Defining the calendar

### Customization Wizard

- Creating a simple type and list type custom tab
- Making changes to an existing tab
- Deleting a custom tab
- Saving/loading a template from file
- Discuss how to import data into a custom field
- Reporting on custom tab data

### QuickStart Data Import

- Required fields
- Using MS Excel format
- Using comma delimited
- Mapping and translating date
- Importing data to a custom tab
- Audit logs

### Overview of Applicant Manager

- Explanation of toolbar buttons
- Applicant report wizard
- Custom tabs
- Hiring applicants

### Training Agenda Day 3

#### Setup Manager

##### Self-Service setup wizard

- Setup/testing the login page address and the SMTP server
- Defining a security policy for self-service
  - Strategy for generation of user ids/passwords
  - Policy for handling forgotten passwords/failed logins
- How to setup/enable the employee self-service applications
  - Walk through setup *My Self, My Family* and *My Company*
  - Walk through setup *My Pay Check*
    - Discuss requirements for *Pay Check Detail*
    - Walk through the *My Time Off* configuration screens
      - Defining the process for requesting/approving time off
      - Security requirements for *My Team Tab*
    - Walk through setup *Home* and setup *Custom Tabs*
  - Open enrollment setup
  - Setup approval policies
  - Walk through *My Benefits* configuration screens
    - Enabling sections
    - Enabling the benefit plans
    - Configuring the comparison screens for benefit plans
    - How to customize instructions and messages
  - Kicking off an open enrollment period
  - Accounts tab – employee manager
  - Enable/disable user accounts
  - Generate/re-set user passwords
  - Sending account information using correspondence wizard
  - New hire enrollment wizard vs. open enrollment wizard
  - Monitoring the open enrollment/new hire statuses
    - Approving/rejecting pending changes
    - Reviewing the self-service logs
  - Leave time-off request system process

#### Manager Self Service

##### Setup

- Creating users and defining their roles
- Walk through the approval workflow
  - Build approver roles
  - Build approver chains
  - Define the approval workflow
- How to rename or hide fields

##### Use

- Working with employees
  - Using the employee finder
  - What defines direct reports

- The employee card
- Adding information to an employee record
  - Personal
  - Employment
  - Compensation
  - Job information
  - Leave summary
- Working with tasks
  - What is a task?
  - How to approve/skip/override the approval chain on a task
  - What happens when a task is approved or rejected
  - Adding comments to the task and for the next approver

### **Ascentis HR Alerts 5.1**

- Connecting to the alerts server
- Agent control panel
  - Email agent
  - Data source
  - Global fields
- Copying, importing, exporting alerts
- Configuring an alert
  - Steps and sub steps
    - Configuring/previewing the "get" step
    - Monitor vs. query alerts
    - Configuring/previewing the "send" step
  - Testing (running the process)
  - Trouble shooting
  - Enabling an alert