Training Agenda Day 1

Setup Manager

Getting Around

- Navigation Tips and Tricks
- 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 - Creating new Benefit Plans

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

Benefit Setup Wizard - Modifying an Existing Plan

- Eligibility rules
- Changing rates
- Exporting/importing a plan
- Ending a plan vs. Deleting a plan

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
- 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
- Saving/loading a template from file
- Discuss how to import data into a custom field

<u>QuickStart Data Import</u>

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

Employee Manager

<u>Getting Around</u>

- Navigation Tips and Tricks
- How to get the most of out of the Employee Finder

<u>The Employee workspace</u>

- Personal information tab
    - New employee
    - Add/remove a picture
    - 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

<u>The Compensation workspace</u>

- 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

Training Agenda Day 2

<u>The Benefits workspace</u>

- Enrollment information
    - How to enroll employees in benefit plans
    - Showing enrollment history

- Change/view/delete options
- Recalc button
- Using the “Batch enrollment” wizard
- Eligibility tab
  - Overriding eligibility
  - Viewing eligibility calculations
- Other insurance tab
- Providers tab
- Beneficiaries tab
- Billing adjustments tab
  - Remittance report

<u>Attendance workspace</u>

- 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

<u>Employee Correspondence Wizard</u>

- 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

<u>Reporting</u>

- 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

Employee SelfService

<u>Setup</u>

- 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

Use
- 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