

HRIS Administrator Training Agenda 2 Hour Online Course

Setup Manager

- Introduction to the toolbar
 - Explanation of the toolbar buttons
 - Tool tips
- Introduction to the menu
 - Explanation of various menu items
- Security
 - License tab
 - Set up and explanation of roles
 - Assigning roles to users
- Company information
 - General tab
 - Locations tab
 - Divisions tab
 - Departments tab
 - Job titles tab
- Benefits setup
 - Creating a new medical plan
 - Step by step creating a medical plan
 - Eligibility rules
 - Changing rules
 - Importance of finalizing a plan
 - Walking through the benefit setup wizard by plan type
 - Medical
 - Dental
 - LTD/STD
 - Retirement/401k
 - Section 125 plans
 - Enrollment of section 125 plans
 - Healthcare re-imbusement
 - Dependent care
 - Premium conversion
 - How to verify premium conversion
 - The other (custom) plan type
 - Exporting/importing a plan
 - Ending or deleting a plan
 - Setting a bookmark
- Enrollment of benefits
 - Individual enrollments
 - Batch enrollments
 - Configure a new batch
 - Online enrollment using Self-Service
- Attendance setup wizard
 - Setting up a new leave type
 - Modifying a leave type
 - Deleting a leave type
 - Setting up FMLA
 - Changing leave unit configuration (to days or hours)

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Setup Manager Continued

- Customization wizard
 - Setting up a new custom tab
 - Changing an existing custom tab
 - Deleting a custom tab
 - Saving and loading a custom tab template to a file
 - Loading a custom tab template from the internet
- QuickStart data import
 - Recommendations for importing data
 - SSN requirement
 - Using MS Excel format
 - Using comma delimited
 - Dependant data
- Employee correspondence wizard
 - Creating a correspondence batch
 - Selecting fields for insert
 - Choosing recipients
 - Choosing a delivery method
 - Modifying, organizing and running saved batches
- 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 a file
 - Saving a report as a .pdf
 - How to modify/print a saved report
 - Organizational chart using Visio
- Employee Self-Service Administration
 - 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
 - Leave time off request system process
 - Reviewing the self-service logs