

Ascentis HR Training Workshop Training Agenda Day 1

Setup Manager

Introduction

- 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
- Introduction to the benefits setup wizard (Complete training on Day 2)

- Explanation of modify/view
 - Eligibility rules
 - Creating an open enrollment period
 - Changing rates
- Exporting/importing a plan
- Ending a plan
- Deleting a plan
- Setting a bookmark

Brief explanation of the self-service setup wizard

Attendance setup wizard

- Creating a new leave type
- Modifying an existing leave type/policy
- Deleting a leave type
- Setting up FMLA
- Changing leave unit configuration (days or hours)
- Defining the calendar

Employee Manager

Introduction to the toolbar

- 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
- 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

Compensation workspace

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

Benefits workspace

- Enrollment information
 - How to enroll
 - Showing enrollment history
 - Change/view/delete options
 - Recalc
- Eligibility tab
 - Overriding eligibility
 - Viewing eligibility calculations
- Other insurance tab
- Providers tab
- Beneficiaries tab
- Billing adjustments tab

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

COBRA/HIPAA

Overview of the COBRA section

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

OSHA

Entering/maintaining cases

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

Applicant Manager

Introduction to the applicant manager

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

Benefits

Walking through the benefit setup

- Dental plan type
- LTD/STD plan type
- Retirement plan type
- Section 125 plan type
 - Healthcare reimbursement
 - Dependant care
 - Premium conversion
 - How to verify pre-tax contribution
- Creating an "Other" (custom) plan type

Creating enrollment records

- Review "individual" enrollment
- "Batch" enrollment
- Brief explanation of "online enrollment" using self-service (Complete training on Day 3)
 - New hire wizard
 - Open enrollment wizard

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

QuickStart Data Import

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

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 file
- Saving a report as a .pdf
- How to modify/print a saved report
- Organizational chart using Visio

Enrollment Form Maker Tool

- Setup and configuration
- Creating the carrier plan group
- Printing enrollment forms

Ascentis HR Training Workshop Training Agenda Day 3

Employee Self-Service

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 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

Ascentis HR Alerts 4.1

- 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