

HR Generalist Training Agenda 2 Hour Online Course

Employee Manager Workspace

- Using the side toolbar and file menu
 - Explanation of the toolbar buttons
 - Introduction to the menu
 - Hot keys
- Using the navigation toolbar
 - How to get the most out of the employee finder
- Employee window
 - Personal information tab
 - New employee
 - Add/remove a picture
 - Delete employee
 - Contact tab
 - Employment tab
 - Termination wizard results
 - How to re-hire an inactive employee
 - Job tab
 - Setting up a supervisor
 - Dependents tab
 - OSHA tab
 - Other tab
 - Notes and attachments tab
- Compensation window
 - 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 window
 - Enrollment information
 - How to enroll
 - Showing enrollment history
 - Change/view/delete options
 - Recalc button
 - Eligibility tab
 - Overriding eligibility
 - Viewing eligibility calculations
 - Other insurance tab
 - Providers tab
 - Beneficiaries tab
 - Billing adjustments tab

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- COBRA/HIPAA
 - Coverage and continuation summary
 - Printing notices
 - Posting a COBRA election
 - Posting a COBRA payment
 - Viewing the notices log
 - How to show COBRA active
 - How to end COBRA election
- Attendance window
 - Summary tab
 - Starting a leave type
 - Stopping/deleting a leave type
 - Viewing calcs
 - Leave taken
 - Recording time off and adjustments
 - Brief summary of online leave requests through self-service
- FMLA
- Entering/maintaining OSHA cases
 - Within the employee workspace
 - Globally from utilities/OSHA status
 - Summary report
- Employee correspondence
 - Creating a correspondence batch
 - Selecting fields for insert
 - Choosing recipients
 - Choosing a delivery method
 - Modifying, organizing and running saved batches
- Reporting
 - Walk through a standard report
 - Setting criteria within the report wizard
 - Creating 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