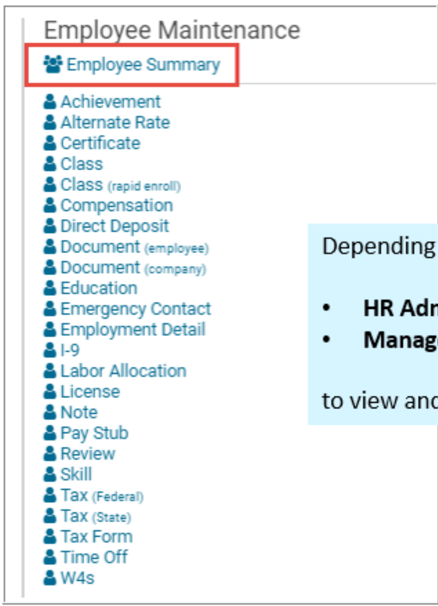
PayNortheast

Employee Summary Screen in Advanced HR 2.0

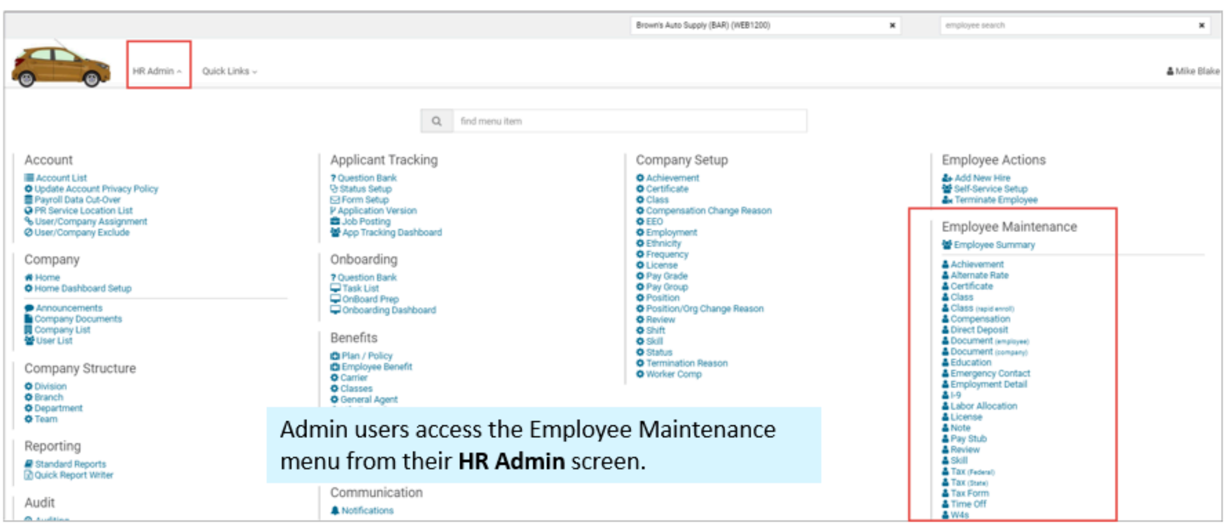
The **Employee Summary** dashboard displays a list of all the active employees in the company. The Employee Summary dashboard allows the user to access Employee information at a glance, add a New Hire, begin Onboarding Prep, and start the Self-Service Setup.



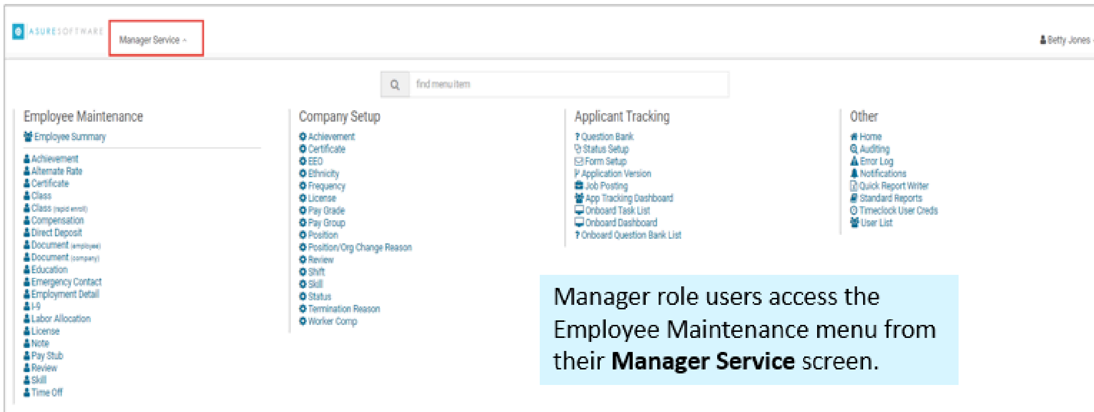
Depending on your role, go to:

- **HR Admin – Employee Maintenance – Employee Summary** or,
- **Manager Service – Employee Maintenance – Employee Summary**

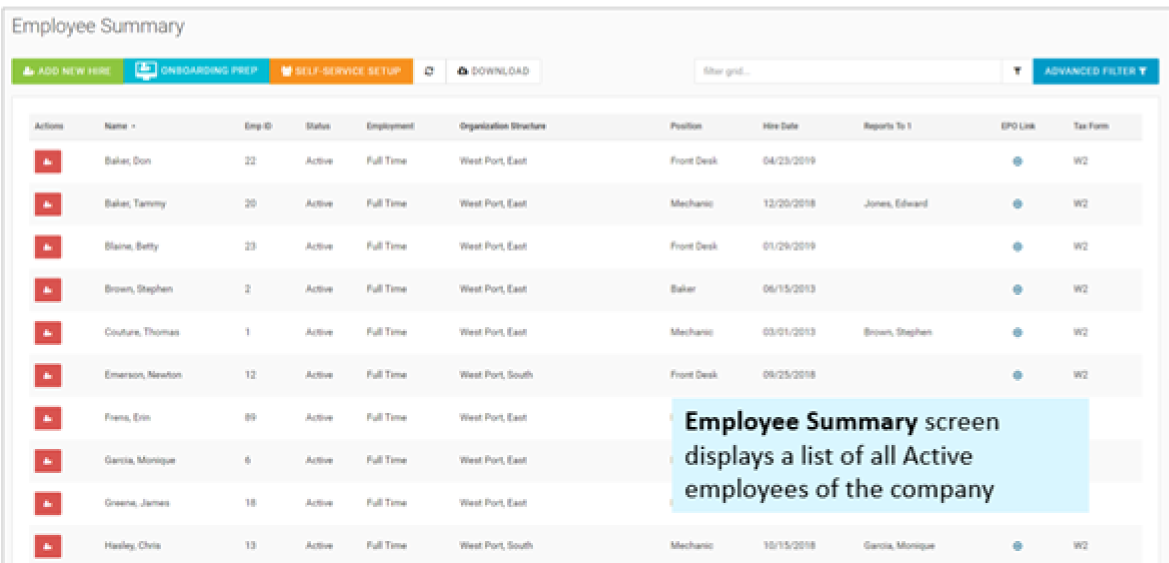
to view and edit employee information.



Admin users access the Employee Maintenance menu from their **HR Admin** screen.



- When clicked, the **Employee Summary** dashboard will show all the employees for the company.
- If no company is selected, the **Employee Summary** dashboard will display all the employees for all the companies the user has access to.



The list of employees you see depends on your security role:

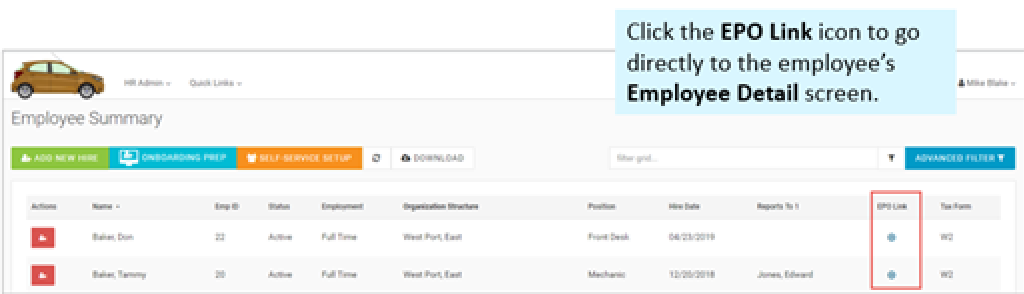
- If you are a **Super Admin**, you will see all employees for all companies.
- If you are a **Service Bureau Admin**, you will only see the employees of the companies you have access to.

Before applying any filters you will have visibility of *all* active and terminated employees. This grid can easily be filtered down to any level of visibility including hire date range utilizing the **Advanced Filter**. To learn how to use the Advanced Filter click here.

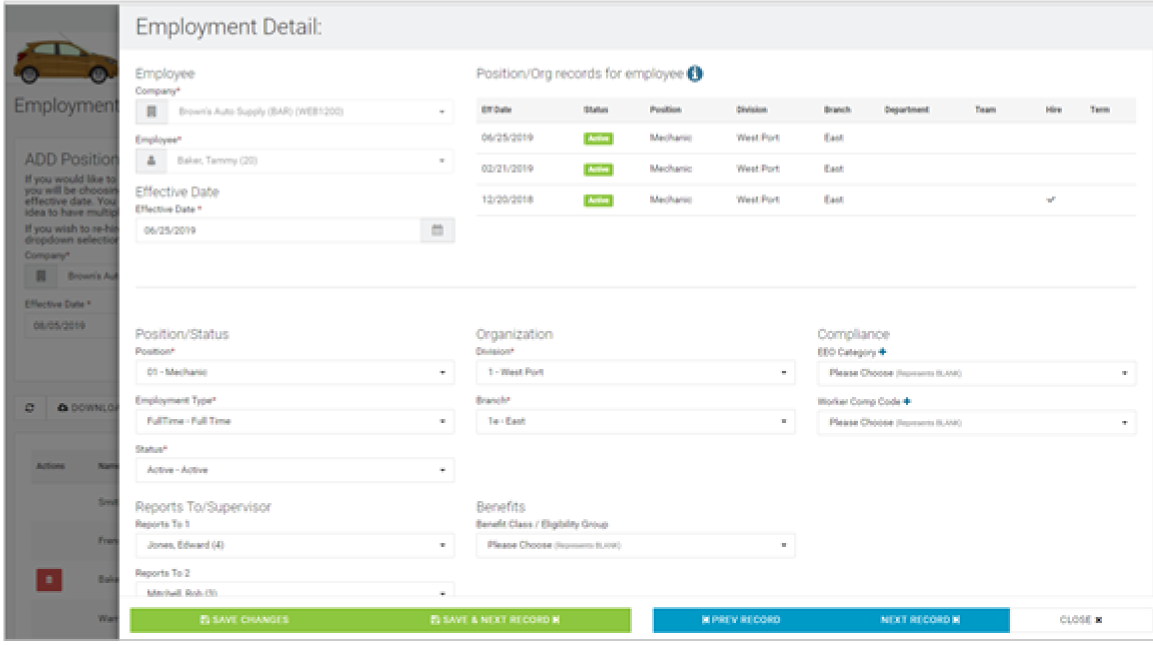
The Employee Summary dashboard displays the following information for each employee in columns:	
• Employee Name	• Employee ID (Employee Number
• Status	• Employment Type
• Organization Structure (DBDT)	• Position
• Hire Date	• Reports To 1
• Tax Form	

From the **Employee Summary** screen, you also have the option of:

- Add a new hire
- Initiate Onboarding Prep (getting a new hire or candidate ready for onboarding)
- Self-Service setup (do a mass self-service onboarding)
- Terminate a specific employee by clicking on the red icon in the **Actions** column
- Click on the **EPO Link** icon (shown below) on a row to go directly to that Employee's **Employee Detail** screen where you can create a new Position Org entry for the employee.

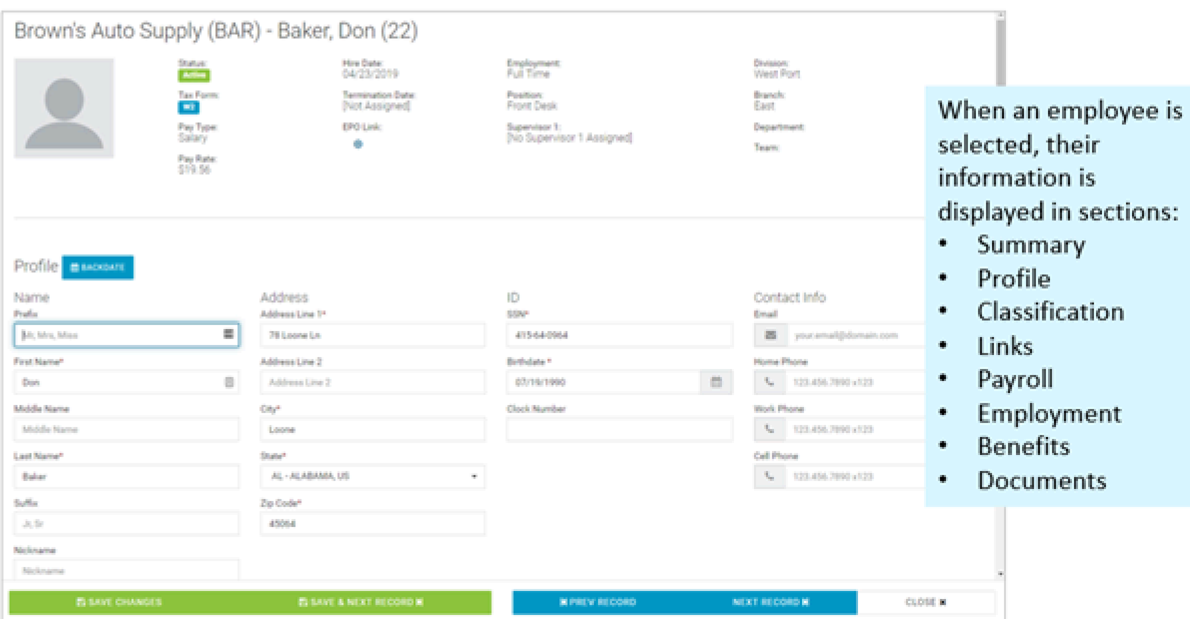


It will add an additional line for the new entry for that effective date. Note that when you go to the **Employment Detail** screen, find something in the list and edit it, the system will edit that specific entry, it will not create a new one.



See the [Employment Detail screen topic]() for more information about this screen.

Employee Summary Screen Sections

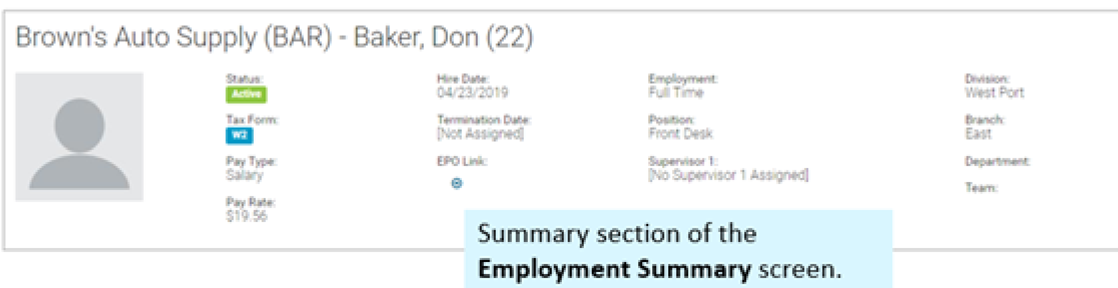


The Employee Summary screen contains the following sections:

Section	Description

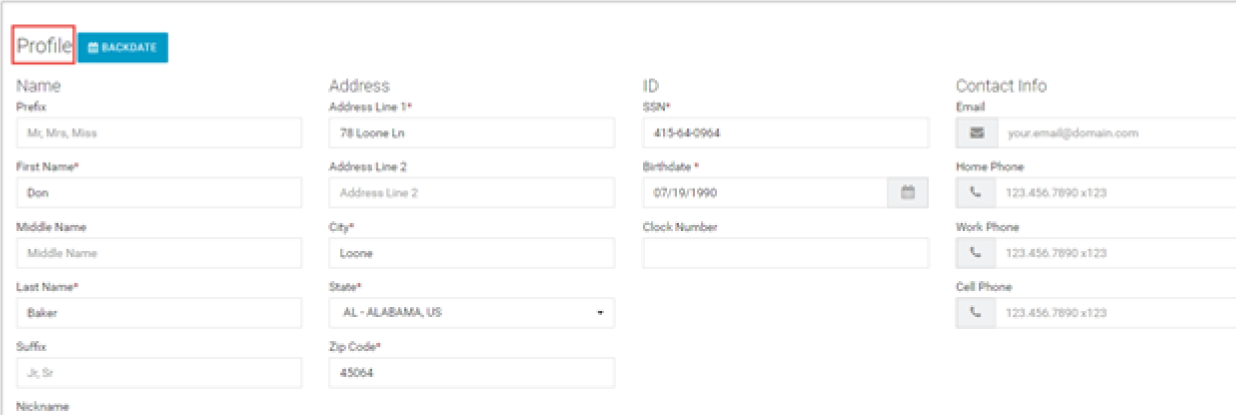
Summary	Gives a read only breakdown of the employee's information.
Profile	Displays Name, Address, SSN, etc.
Classification	Shows Gender, Ethnicity, Marital Status, etc.
Links	Displays the Linked User(s). Shows which Security Role(s) the employee has assigned to them. Also allows for the Quick User Add feature to be used.
Payroll	Displays Pay Frequency and Standard Hours.
Employment	Shows FLSA Classification and whether or not the employee is Eligible for Rehire.
Benefits	Allows the user to set an Eligible for Benefits date and what Medical Coverage is Offered.
Documents	Employee specific Documents can be uploaded.
Integration	Can be used to synch Employee to Timeclock (for W-2 or 1099 employees)

Top section and **Profile** section. The Summary provides a read only breakdown of the employee's information.



The Top section is a dashboard of important info with more detailed sections below. Your ability to edit this information is dependent on your security role access. Managers for example, are only allowed access to their designated employees they supervise.

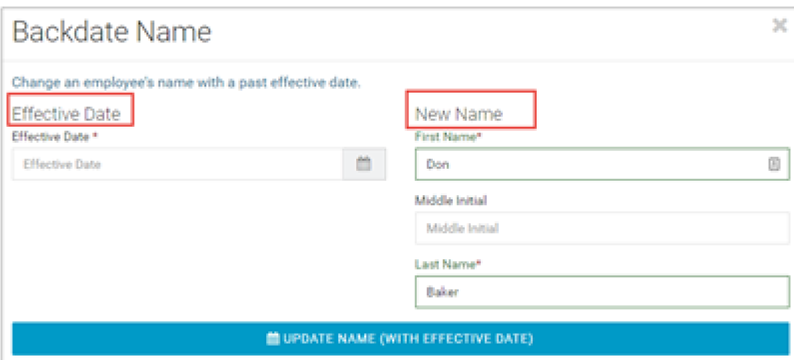
In the **Profile** section, we can see the employee's basic information, Name, Address, SSN, etc. The Clock Number is the SwipeClock number.



Note that the **Address Line 1** field is limited to 30 characters in length.

Note that you can backdate a changed employee's name with a past effective date if needed, by clicking the **Backdate** button

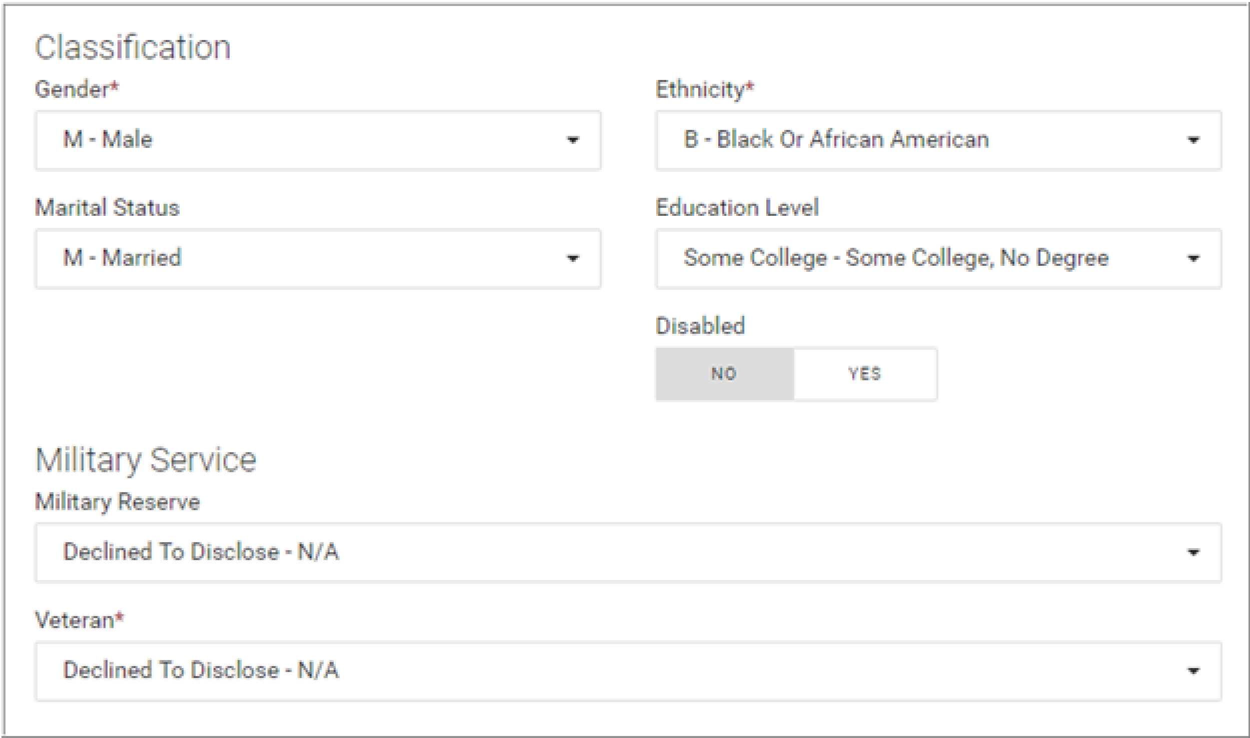
on the **Profile** section of the **Employee Summary** screen. The system displays the popup screen below:



Enter the **Effective Date** and the **New Name**, then press the **Update Name** (**with Effective Date**) button.

Classification section

The **Classification** section of the Employee Summary screen displays gender, marital status, disability flag if applicable, Military Service related information if applicable, and ethnicity.

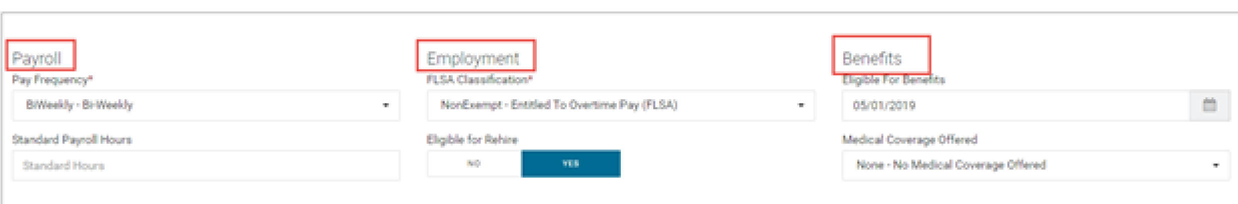


Note that if you set the **Veteran** dropdown to **Yes**, the screen redisplays with additional military service related information fields.

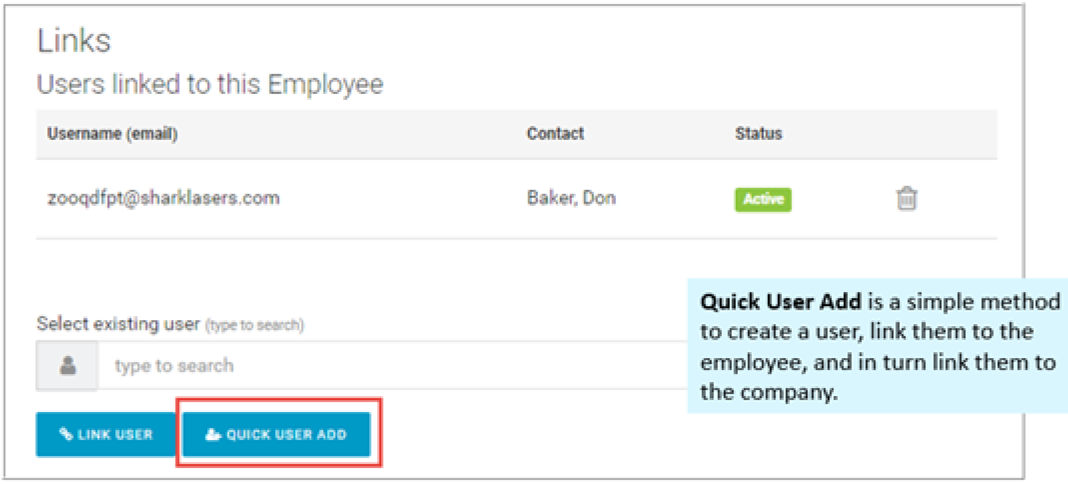
Payroll / Employment / Benefits sections

An employee's **Payroll**, **Employment**, and **Benefits** information can be accessed and edited. You can set a benefits eligibility date here and what medical coverage is offered.

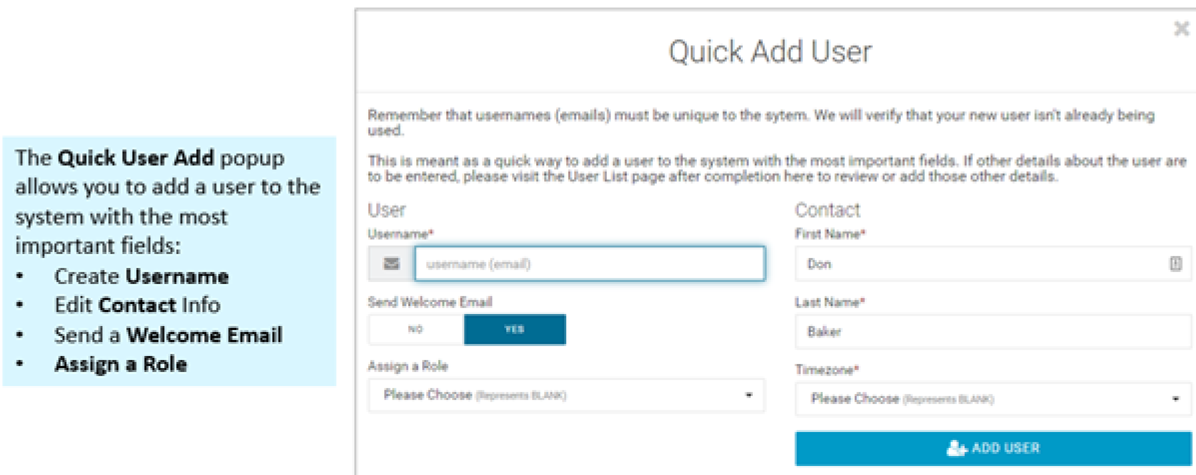
Note that what appears in the dropdowns is actually created in the **Company Setup** tile.



Links section – with **Quick User Add**



The **Links** tile allows the user to link the employee with a user. You can also see what Security **Role**(s) this employee has been assigned.



Click the blue **Add User** button when complete. You'll be taken back to the **Employee Summary** screen. Remember to click the green **Link User** button to link:

- The user
- The employee
- The company

Remember, you have an **employee** and you have a **user**. They have to be linked together. If they are not linked together, then when the employee signs in, they will not have any access to anything; they will see a blank Dashboard.

In the **Roles for all Users** section, you can see what security role(s) this user has. You can see the user shown below is an example of a Base User role for a company.

Roles for all Users

Role	Level	Company Name
WEB1200 - BaseUser	10	Brown's Auto Supply (BAR) (WEB1200)

Here is a different example showing an employee who has multiple roles:

Roles for all Users

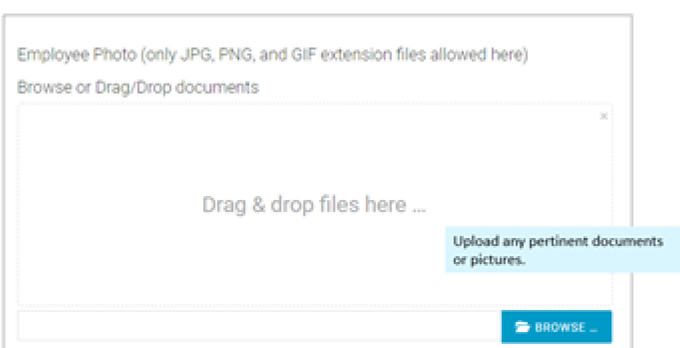
Role	Level	Company Name
WEB1200 - BaseManager	25	Brown's Auto Supply (BAR) (WEB1200)
WEB1200 - BaseUser	10	Brown's Auto Supply (BAR) (WEB1200)

You can see that this user is both a **Base Admin** and a **Base User**. Giving this person the **Base User** role in addition to Base Admin, gives them access to a **My HR** menu tab for viewing their own information.

Note: Remember that **usernames** (emails) must be unique to the system. Advanced HR 2.0 will verify that the new username is not already being used. Quick User Add is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered, go to the **Company - User List** screen after completion to review or add other details about the employee.

Employee Photo section

You can upload a photo of the employee (.jpg, .png, or .GIF) using the Employee Photo section. You can Browse your pc or drag and drop the photo.



Integration section

A **Timeclock** tile may display in the **Integration** section of the **Employee Summary** screen, if, for this company, in the **Other Info** section of the **Company List** screen, the **Enabled SwipeClock Sync for 1099 Employees** Yes/No toggle button has been set to **Yes**.