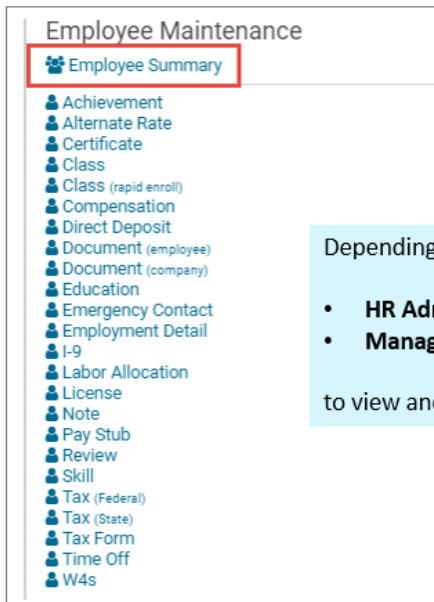


Employee Summary Screen in Advanced HR 2.0

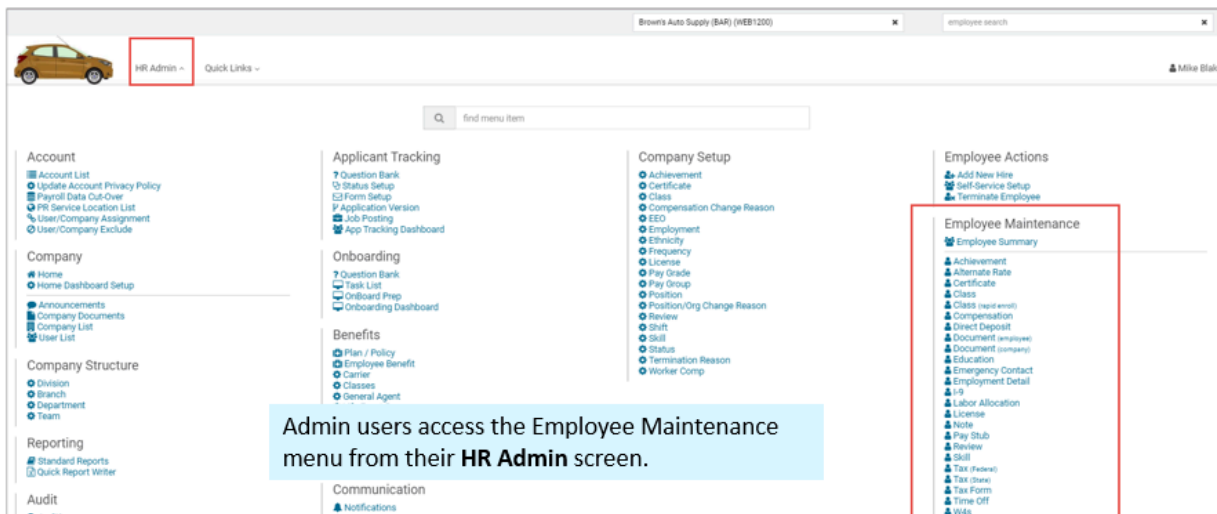
The **Employee Summary** dashboard displays a list of all the active employees in the company. The Employee Summary dashboard allows the user to access Employee information at a glance, add a New Hire, begin Onboarding Prep, and start the Self-Service Setup.



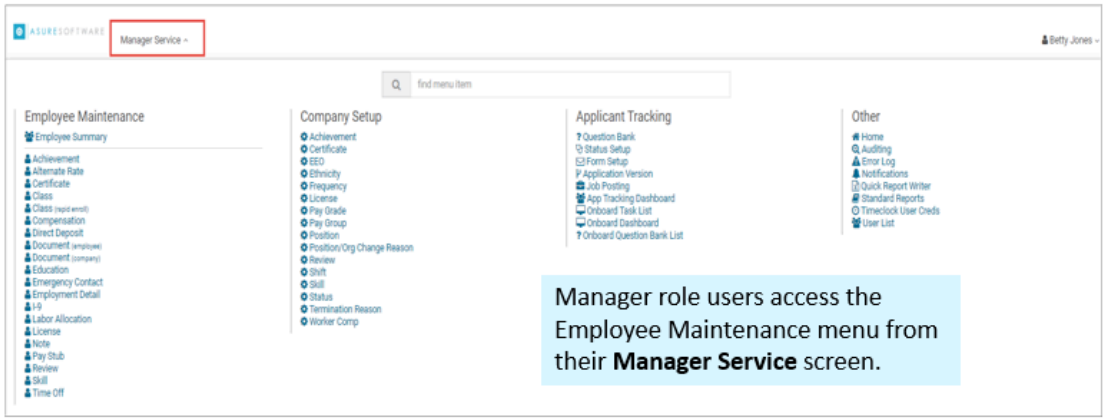
Depending on your role, go to:

- **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.

Employee Summary

ADD NEW HIRE | ONBOARDING PREP | SELF SERVICE SETUP | DOWNLOAD

Star grid... | ADVANCED FILTER

Actions	Name	Emp ID	Status	Employment	Organization Structure	Position	Hire Date	Reports To 1	EPO Link	Tax Form
	Baker, Don	22	Active	Full Time	West Port, East	Front Desk	04/23/2019			W2
	Baker, Tammy	20	Active	Full Time	West Port, East	Mechanic	12/20/2018	Jones, Edward		W2
	Blaine, Betty	23	Active	Full Time	West Port, East	Front Desk	01/29/2019			W2
	Brown, Stephen	2	Active	Full Time	West Port, East	Baker	06/15/2013			W2
	Couture, Thomas	1	Active	Full Time	West Port, East	Mechanic	03/01/2013	Brown, Stephen		W2
	Emerson, Newton	12	Active	Full Time	West Port, South	Front Desk	09/25/2018			W2
	Fiens, Erin	89	Active	Full Time	West Port, East					
	Garcia, Monique	6	Active	Full Time	West Port, East					
	Greene, James	18	Active	Full Time	West Port, East					
	Hasley, Chris	13	Active	Full Time	West Port, South	Mechanic	10/15/2018	Garcia, Monique		W2

Employee Summary screen displays a list of all Active employees of the company

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.

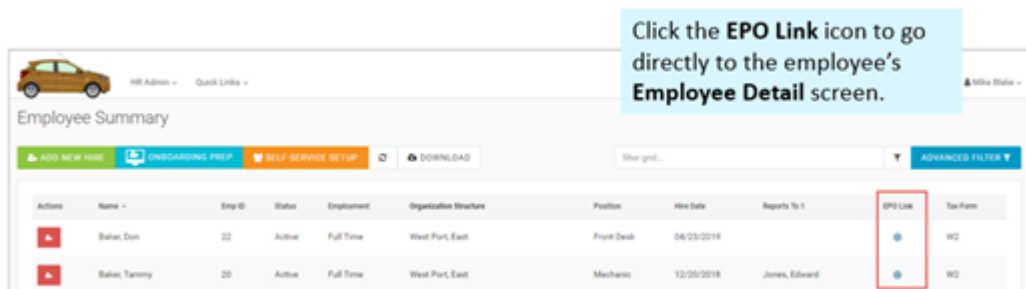
Before applying any filters you will have visibility of *all* active and terminated employees. This grid can easily be filtered down to any level of visibility including hire date range utilizing the **Advanced Filter**. To learn how to use the [Advanced Filter](#) [click here](#).

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.

Employment Detail:

Employee
 Company* Brown's Auto Supply (BAR) (WEB1200)
 Employee* Baker, Tommy (20)
 Effective Date* 06/25/2019

Position/Org records for employee

ET Date	Status	Position	Division	Branch	Department	Team	Hire	Term
06/25/2019	Active	Mechanic	West Port	East				
02/21/2019	Active	Mechanic	West Port	East				
12/29/2018	Active	Mechanic	West Port	East			✓	

Position/Status
 Position* 01 - Mechanic
 Employment Type* FullTime - Full Time
 Status* Active - Active

Organization
 Division* 1 - West Port
 Branch* 1a - East

Compliance
 EEO Category* Please Choose (Requires SLAW)
 Worker Comp Code* Please Choose (Requires SLAW)

Reports To/Supervisor
 Reports To 1 Jones, Edward (4)
 Reports To 2 Mitchell, Rob (3)

Benefits
 Benefit Class / Eligibility Group Please Choose (Requires SLAW)

SAVE CHANGES SAVE & NEXT RECORD PREV RECORD NEXT RECORD CLOSE

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

Employee Summary Screen Sections

Brown's Auto Supply (BAR) - Baker, Don (22)

Status: Active
 Tax Forms: No
 Pay Type: Salary
 Pay Rate: \$19.56

Hire Date: 04/23/2019
 Termination Date: [Not Assigned]
 EPO Link: [Link]

Employment: Full Time
 Position: Front Desk
 Supervisor 1: [No Supervisor 1 Assigned]

Division: West Port
 Branch: East
 Department:
 Team:

Profile [BACKOFF]

Name
 Profile [Mr, Mrs, Miss]
 First Name* Don
 Middle Name
 Last Name* Baker
 Suffix
 Nickname

Address
 Address Line 1* 78 Loone Ln
 Address Line 2
 City* Loone
 State* AL - ALABAMA, US
 Zip Code* 45064

ID
 SSN* 415-64-0964
 Birthdate* 07/16/1990
 Clock Number

Contact Info
 Email: your.email@domain.com
 Home Phone: 123.456.7890 x123
 Work Phone: 123.456.7890 x123
 Cell Phone: 123.456.7890 x123

SAVE CHANGES SAVE & NEXT RECORD PREV RECORD NEXT RECORD CLOSE

When an employee is selected, their information is displayed in sections:

- Summary
- Profile
- Classification
- Links
- Payroll
- Employment
- Benefits
- Documents

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.

Profile BACKDATE

Name	Address	ID	Contact Info
Prefix Mt, Mrs, Miss	Address Line 1* 78 Loone Ln	SSN* 415-64-0964	Email your.email@domain.com
First Name* Don	Address Line 2 Address Line 2	Birthdate * 07/19/1990	Home Phone 123.456.7890 x123
Middle Name Middle Name	City* Loone	Clock Number	Work Phone 123.456.7890 x123
Last Name* Baker	State* AL - ALABAMA, US		Cell Phone 123.456.7890 x123
Suffix Jr, Sr	Zip Code* 45064		
Nickname			

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:

Backdate Name [Close]

Change an employee's name with a past effective date.

Effective Date [Effective Date] [Calendar]

New Name

First Name*
Don

Middle Initial
Middle Initial

Last Name*
Baker

UPDATE NAME (WITH EFFECTIVE DATE)

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.

Classification

Gender*
 M - Male

Ethnicity*
 B - Black Or African American

Marital Status
 M - Married

Education Level
 Some College - Some College, No Degree

Disabled
 NO YES

Military Service

Military Reserve
 Declined To Disclose - N/A

Veteran*
 Declined To Disclose - N/A

Note that if you set the **Veteran** dropdown to **Yes**, the screen redisplay 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.

Payroll
 Pay Frequency*
 BiWeekly - Bi-Weekly

Employment
 FLSA Classification*
 NonExempt - Entitled To Overtime Pay (FLSA)

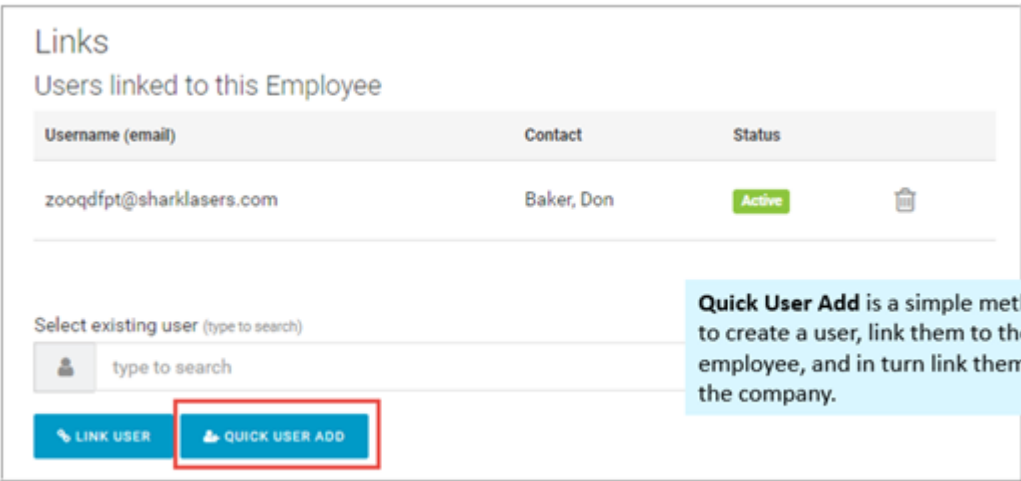
Benefits
 Eligible For Benefits
 05/01/2019

Standard Payroll Hours
 Standard Hours

Eligible for Rehire
 NO YES

Medical Coverage Offered
 None - No Medical Coverage Offered

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.

The **Quick User Add** popup allows you to add a user to the system with the most important fields:

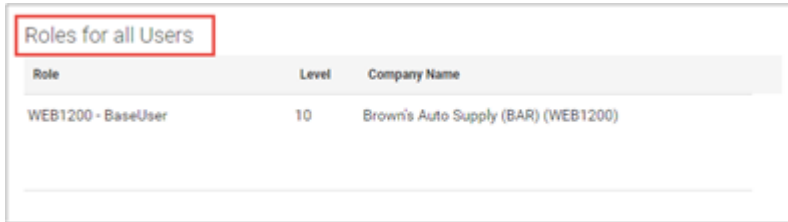
- Create **Username**
- Edit **Contact Info**
- Send a **Welcome Email**
- **Assign a Role**

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

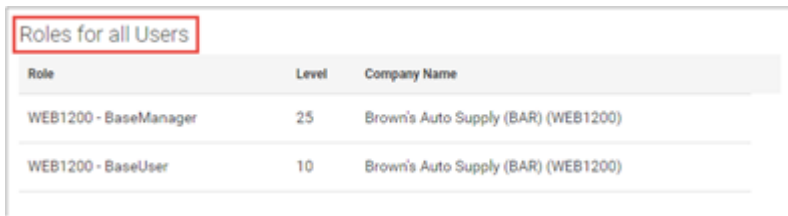
Remember, you have an **employee** and you have a **user**. They have to be linked together. If they are not linked together, then when the employee signs in, they will not have any access to anything; they will see a blank Dashboard.

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.



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:



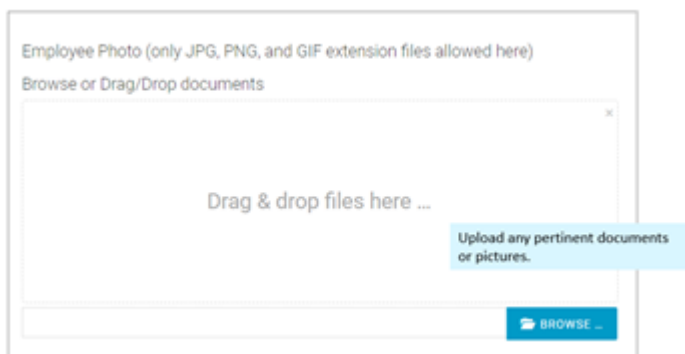
Role	Level	Company Name
WEB1200 - BaseManager	25	Brown's Auto Supply (BAR) (WEB1200)
WEB1200 - BaseUser	10	Brown's Auto Supply (BAR) (WEB1200)

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.



Employee Photo (only JPG, PNG, and GIF extension files allowed here)

Browse or Drag/Drop documents

Drag & drop files here ...

Upload any pertinent documents or pictures.

BROWSE ...

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**.

