

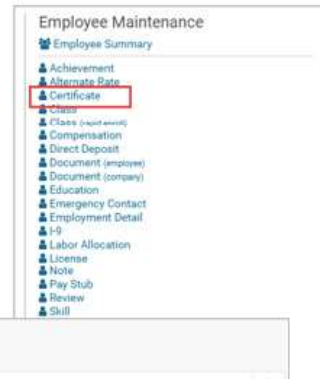
Certificate Screen in Advanced HR 2.0

The term **certification** is often used as a catch-all term for several different activities that apply to credentialing of individuals and institutions. Certificates are designations related to skills, knowledge, or earned credentials an employee might hold. Employee certifications and licenses are required for compliance in certain industries; they can also serve as important designations that impact salary decisions.

Certificates are designations related to skills, knowledge, or earned credentials an employee might hold.

Go to **HR Admin – Employee Maintenance – Certificates**.

Unless you are locked into a particular employee, you will see all the employees for the company that have certificates.



To assign a new certificate to an employee, click the **+ New** button



A screenshot of the 'Certificates' screen. The 'Certificates' title is highlighted with a red box. Below the title are buttons for '+ NEW', a refresh icon, and 'DOWNLOAD'. A search bar labeled 'filter grid...' is also present. The main content is a table with the following data:

Actions	Name	Employee ID	Certificate Code	Certificate Description	Issue Date	Expire Date	Cert #
	Mitchell, Rob	3	01	Fuel Pump Certification	07/17/2018		1325468045
	Brown, Stephen	2	01	Fuel Pump Certification	04/18/2019	04/30/2020	C123456
	Perry, Jackson	5	01	Fuel Pump Certification			
	Brown, Stephen	2	02	Smog test	02/02/2016	10/13/2018	fasdfasdf
	Marley, Tyson	9	02	Smog test	07/31/2018	06/04/2019	45648
	Marks, Jefferson	10	CA101	California Auto Dealer Certification	02/18/2014		CA9078080156F

The **HR Admin - Employee Maintenance - Certificates** screen provides a list of any employee's certifications with the details displayed by clicking on a specific certification item row on the summary screen. You can also assign a new certificate to an employee using this screen.

Assigning a Certificate to an Employee

Once Certificate Types have been setup for a company, Admins can assign a certificate to employees. Admins [create Certificate Types](#) on the **HR Admin – Company Setup – Certificate** screen.

To assign a certificate to an employee:

1. Go to **HR Admin – Employee Maintenance – Certificate**.
2. Click the **+ New** button. Select an employee (if not already locked in) and assign a certificate to the employee.
3. In the **Certificate Type** dropdown, select the certificate to award to this employee.

Certificate: **NEW RECORD**

Employee Company* Brown's Auto Supply (BAR) (WEB1200)	Certificate Info Certificate Type +* Please Choose (Represents BLANK)	Issued By Issued By
Employee* Please Choose (Represents BLANK)	Certificate Number Certificate Number	Issued Date Issued Date
	Notes Notes	Expiration Date Expiration Date
		Employee Acknowledged NO YES

4. If there is a **Certificate Number** and **Date**, enter this information.

Admins can set up a Date-based Notification for a Certificate expiration that will appear on the employee's company Dashboard by using the **HR Admin – Communications – Notifications** screen. When the certificate is about to expire, a notification can be triggered to be sent to the Employee. If wanted, enter the **Expiration Date**.

If the employee acknowledges the certificate, set the **Employee Acknowledged** field to **Yes**.

You can also upload any documents related to the certificate for the employee using the Browse or Drag & Drop feature in the **Documents** section of the screen.

5. Click the **Save Changes** button to save this certificate for this employee.

Employees Display a List of their Certificates

Employees can display a list of their certificates on their **My HR - My Personal History - My Certificates** screen.

This menu option is similar to **My Achievements** and provides a list of any certifications with the details displayed by clicking on a specific certification item row on the summary screen.

Certificates

filter grid...

Actions	Certificate Code -	Certificate Description	Issue Date	Expire Date	Cert #
	01	Fuel Pump Certification	04/18/2019	04/30/2020	C123450
	02	Smog test	02/02/2016	10/13/2018	fasdfasdf
	CA101	California Auto Dealer Certification	02/22/2017	05/01/2022	VT13501

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If an employee's certificate is about to expire, they will be notified, if this feature has been enabled, on their company Dashboard, in the **My Expiring Certifications** section on the right side of their Dashboard.

My Upcoming Classes
No Classes in Upcoming Months

My Expiring Certifications
No Certificates expiring in upcoming months

My Expiring Licenses
No Licenses expiring in upcoming months

Expiring Certification Notifications

Using the **Communications – Notifications** screen (**License & Certification** category) you can set up date-based expiring license and certification reminders targeted to the impacted employee.

Notifications

Notification System is ON and ready for use

License & Certification - License & Certification Standard - Standard Events

filter grid...

Actions	Category -	Name	Active	Recipients	Delivery	Description
	License & Certification	Achievement Expiration Date	NO YES			Notifies recipients of an Employee's upcoming Achievement expiration date
	License & Certification	Certificate Expiration Date	NO YES			Notifies recipients of an Employee's upcoming Certificate expiration date
	License & Certification	License Expiration Date	NO YES	Target Employee ~ Reports To 1 ~ Employees: Jones, Edward (4)	Delivery occurs 5 days BEFORE the Target Date	Notifies recipients of an Employee's upcoming License expiration date

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