EX Human Resources Payroll & Personnel

LEARNING GUIDE

Jenzabar

Compatible with
EX Version 6.3

Jenzabar Learning & Development

Competencies ◆ Knowledge ◆ Skills ◆ Education

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Chapter 1. Introducing the Learning Guide

This guide is a source of information on the setup, configuration, and use of the Payroll and Personnel modules as well as Timecards and Applicant Tracking features within the JICS CRM Staff portlet.

Within this guide, you may find one or more of the following graphics and formats to identify a particular fact, aspect, or detail:

A Note will be used to identify specific information related to the text preceding it and will be recognized by this type of format and icon.

A Hint will be used to point out a suggestion or recommendation that will assist you with the task or function preceding it, and will be recognized by this format and icon.

A Warning will be used to alert you to the consequences of a specific process, step, or its results and will be recognized by this type of format and icon.

Example

An Example will show you the steps of a process recently discussed or how you could put the recent information into practice, and will be recognized by this type of format and icon.

Case Study

Case Study will describe a recently discussed topic in detail to show how the principle can be applied to your situation.

In this document, you may see windows or features that you cannot access from your own system. Please note that what you see in your EX database will depend on your permission settings. If you do not see a window or feature that you need, contact your system administrator.

If you have questions about the setup and configuration of the tables, log into MyJenzabar.net, go to Support → EX → Module Resource Center, and choose the module you need to configure. The Configuration Guides are updated for each release and maintained by the Services group. If you need information about a specific field on a window, open the window in EX and then press F1 for the Help Documentation.

Chapter 2. Explaining the Guide

This chapter will provide an overview of the topics that will be addressed during the length of the course.

Agenda

- Maintaining Tables
- Working with Employees
- Processing Payroll
  - Payroll Controls
  - Timecards (CRM Staff)
  - Generate Check Batches
  - Print Checks/Transfer Direct Deposits
  - Update Payroll
- Using Applicant Tracking
  - Position Requests
  - Hiring Officers
  - Creating Positions
  - Application Process
  - Processing Applicants
  - Hiring an Employee
- Running Reports
  - Payroll Reports
  - Personnel Reports
  - Applicant Tracking Reports

Objectives

At the end of this guide, you will be able to:

- Work in the Payroll and Personnel tables
- Manage and maintain employee records
- Process payroll
- Utilize Timecards and Applicant Tracking
- Hire a new employee
- Run Human Resources Reports

Summary

Human Resources (HR) is comprised of the Jenzabar EX Payroll and Personnel products. This Learning Guide will give you an overview of the processes that take place in the Human Resources within Jenzabar EX, and you will learn which tables need maintained, step-by-step processes for working in the Payroll/Personnel, and learn how to complete the day-to-day tasks.

In addition to HR modules, this guide will cover the setup and use of the JICS CRM Staff portlet that will allow you to use Timecards and Applicant Tracking on the JICS web portal.

Overview

Human Resources is the result of combining Personnel and Payroll with the features in CRM Staff.

Personnel

In the Personnel product, you will work with employee records to ensure that all information and details of the individual are correctly entered into your system.

Payroll

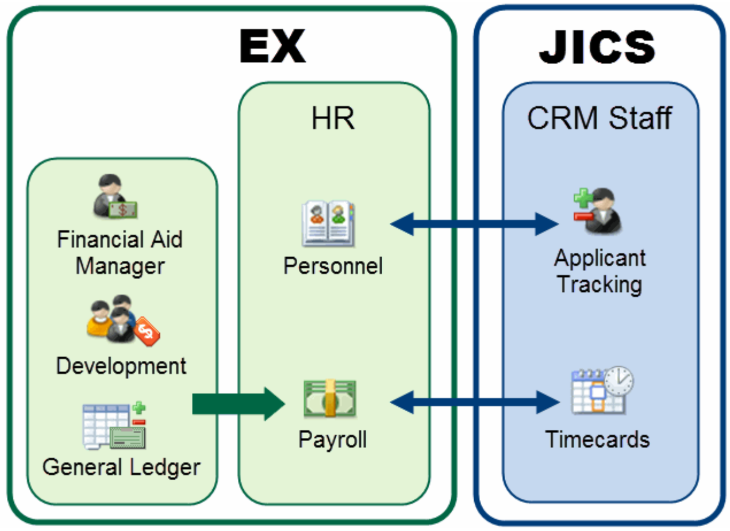
Within Payroll, you will work with windows and reports to use timecards, manage benefits, process payroll, issue checks or direct deposits, and update payroll to ensure that all employees recieve their money on time.

CRM Staff

There are two main features in CRM Staff that affect HR. Applicant Tracking and Timecards. The Applicant Tracking process will allow you to track positions and applications from the moment a position is requested all the way through the hiring of your chosen applicant. The Timecard feature will allow your employees to enter their work time and allow a supervisor approve the time.

HUMAN RESOURCES

Working Together



The Human Resources module is integrated with many other modules across the EX and JICS systems. Payroll and Personnel are closely tied together through employee records and many common windows. Payroll also works with General Ledger, Financial Aid Manager, and Development within the EX system to relate financial information and account numbers. The CRM Staff portlet within JICS helps to make the HR processes as easy and seamless as possible. Allowing your employees 24x7 self-service access, this web-based data management system delivers timely and accurate data to your staff (when they need it), and provides a user-friendly environment for many Human Resources tasks.

When you are using CRM Staff with Personnel, you can use the Applicant Tracking feature that will allow you to follow the application process from internal and external influences. When using CRM Staff with Payroll, you can utilize the Timecards function that will make it easier for employees to enter their hours, and for supervisors to review and approve the timecards of their staff.

Chapter 3. MAINTAINING TABLES

Most of your tables should already be configured for you; however, you will need to continually maintain several tables within the HR modules to ensure the content is correct. Because the Human Resources modules deal with personal and financial information, it is important that the data and tables be maintained properly.

OBJECTIVES

At the end of this chapter, you will be able to:

- Create Payroll groups
- Apply security to groups
- Edit, create, or delete benefit codes
- Set accrual standards
- Organize jobs, positions, and supervisors
- Check annual tax codes

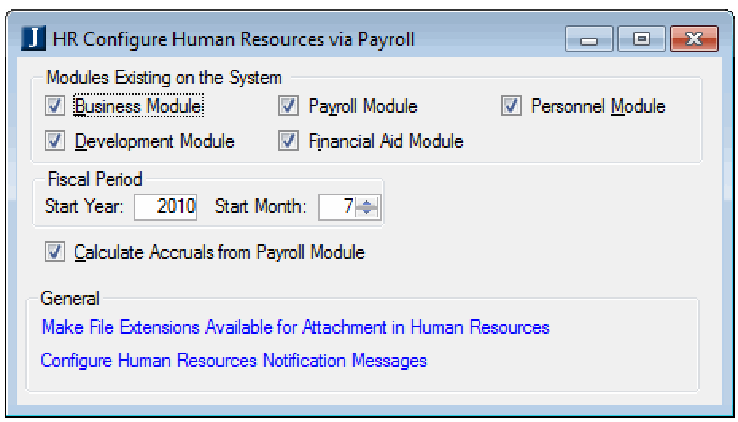
CONFIGURATION

When working with Human Resources, there are three main configuration windows you will need to use: **Configure Human Resources** via Payroll or Personnel, **Configure Personnel**, and **Configure Payroll**.

Configure Human Resources via Payroll/Personnel

This window is separated into four sections, and is available in both the Payroll and Personnel modules.

The first section, ***Modules Existing on the System***, is an informational section that will let you know what additional EX modules your school is using that can interact with HR.



Fiscal Period allows you to identify your current fiscal year and month. For most schools, this date may be the date you converted over to the Jenzabar EX system; however, this month and year will need to be updated if you use the *W2 Member Investment Plan* benefit.

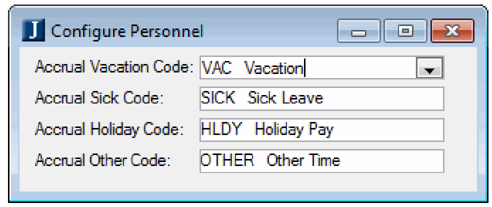
The ***Calculate Accruals from Payroll Module*** checkbox controls how the accrual benefits are processed during a pay run. There are two ways to calculate the accruals; you can process them through payroll or through accrual batch process. If you want the accrual information for each individual to calculate during the payroll run, select this checkbox. You will want to turn this option off if you are running accruals manually, or if you are submitting bonuses or other additional pay.

If you do not have the Payroll module, make sure this checkbox is cleared.

The ***General*** section of this window has two options that will affect your Human Resources modules. From this section, you can define file extensions and configure the notification messages. File attachments can be added during several processes to provide additional information, and you need to determine what type of file extensions users can upload (for example, .doc, .docx, .xls, .xlsx, .pdf, etc.). You may also want to configure the notification messages users will receive to keep groups and individuals informed about specific details and processes within Applicant Tracking.

Configure Personnel

From the **Configure Personnel** window, you will define your accrual benefit codes that can be used throughout the Personnel module. The benefits that can be defined in HR include, Vacation, Sick, Holiday, and Other times that will accumulated at a certain rate or amount per hours worked.



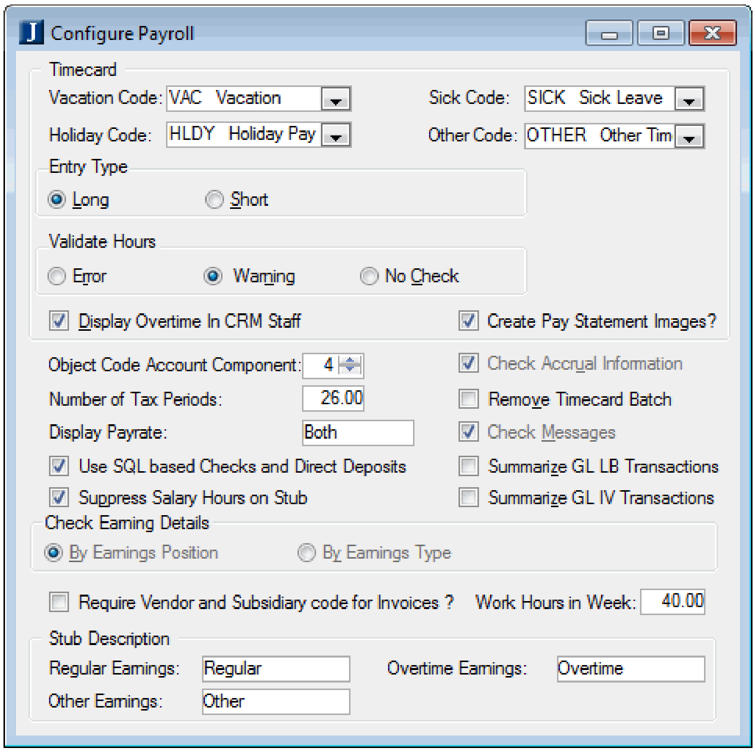
You cannot define more than four default accrual benefit codes, and these must already be entered on the Benefits Control table.

Configure Payroll

From this configuration window, you will define tax periods, check layout, hours, and timecard details. The **Configure Payroll** window mainly deals with accruals and timecard entry, and has many settings that will determine how your timecards work.

The ***Validate Hours*** section will be important because the option you choose here will determine how your timecards check the entered data:

- ***Error:*** if your timecard totals do not match, an error message will appear and the system will not allow you to leave the Timecard Entry window until your totals are fixed and match
- ***Warning:*** if your timecard totals do not match, this option will give you a warning message to let you know, but will still allow you to exit the Timecard Entry window assuming you will return to correct the information before continuing to process payroll
- ***No Check:*** this option will not check any of your totals for validity and assumes that all of your data is correct



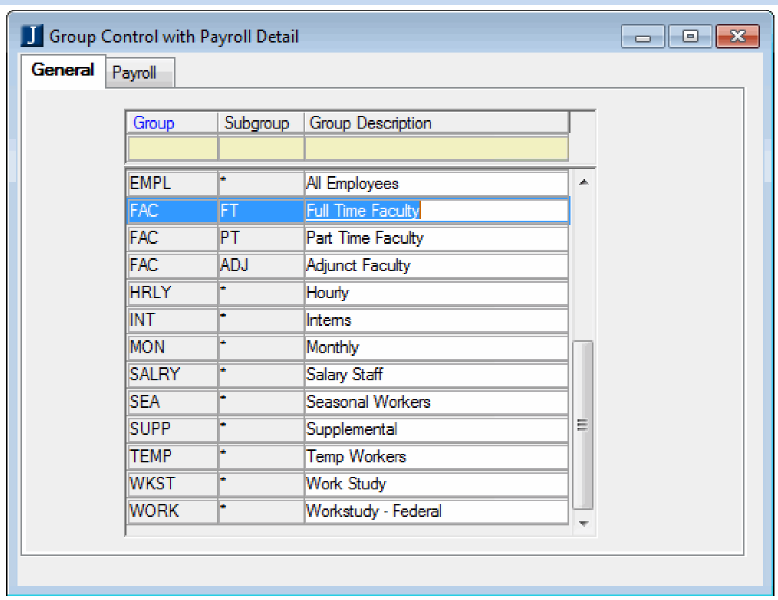
The ***Display Overtime in CRM Staff*** and ***Create Pay Statement Images?*** checkboxes determine whether employees can enter their own overtime hours and view their paychecks within the CRM Staff web application.

This window, also allows you to make several other decisions on how your Timecard Entry will work for your employees and for your Payroll department.

If you will be using the CRM Staff Timecard feature, this window will need to be setup prior to using the Payroll module.

Group Control with Payroll Detail

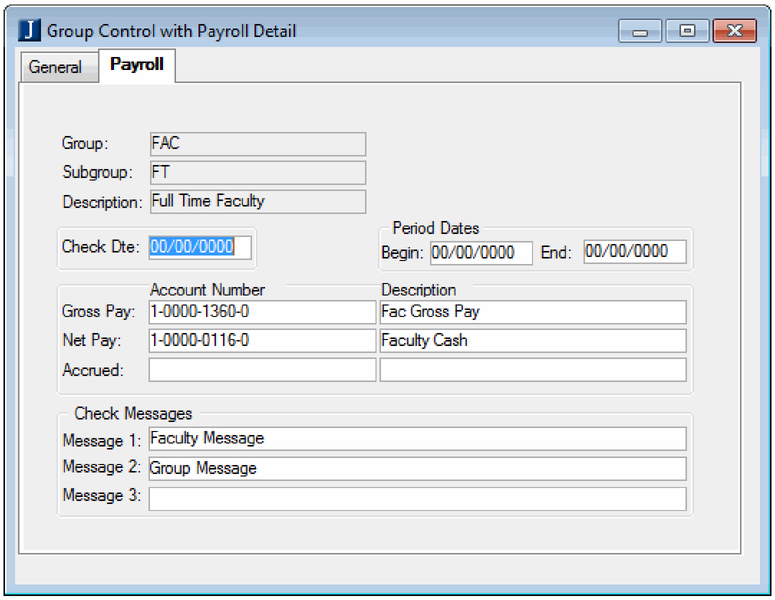
This window will allow you to group employees for payroll. You can have as many or as few groups as you need, and add new groups or subgroups as necessary. You can also assign security permissions to each group.



These groups are important for organizing your payroll, especially if you allow employees to enter their hours on the CRM Staff portlet.

The General tab contains the same information as the Group Control window (PE)

Depending on how your Human Resources department wants to organize the groups, you can have very detailed groupings or more simplistic groupings. For example, a more simplistic approach may include only full- and part-time employees. A more detailed approach may first break employees up into Administrative, Staff, and Faculty, then further into full- and part-time. There may also be additional positions that fall under Administrative or Staff employees such as Temporary workers and Interns; and in the case of Faulty, may include Adjuncts.



Every group will have additional information on the **Payroll** tab of the window.

From the **Payroll** tab, you can start associating GL account numbers to the specific group.

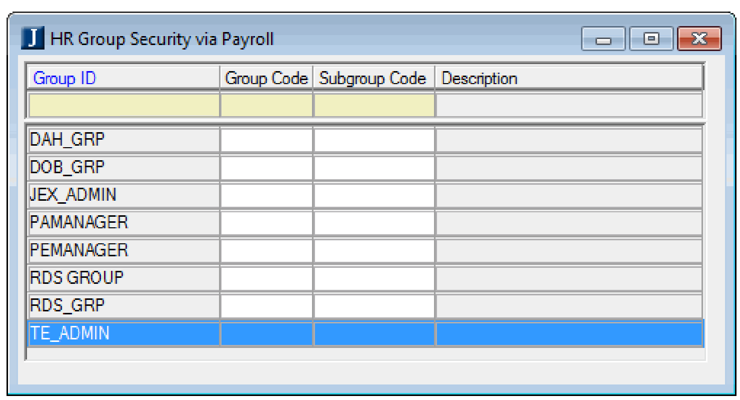
From this window, you can also edit the check date, period dates, add account numbers, and write messages that will appear on the check.

The check and period dates are informational only and do not affect the system.

Once you have made your selections, save your work and you can go back to the **General** tab to edit more groups or exit the window.

Applying Security

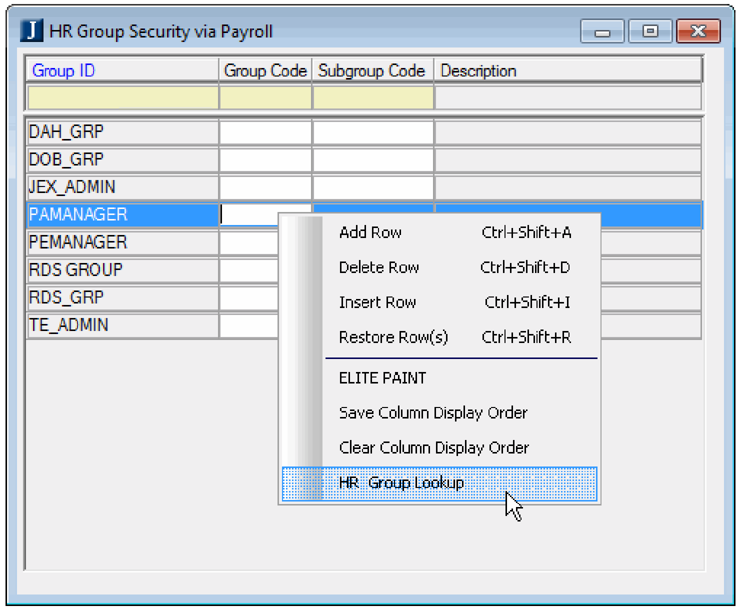
Once you have identified your groups and subgroups, you can add security by going to the **HR Group Security via Payroll** window.



For example, if you have work-study students in the office, but only want to allow them to see other students, you could apply security that would block them from employees and still allow them to see other students.

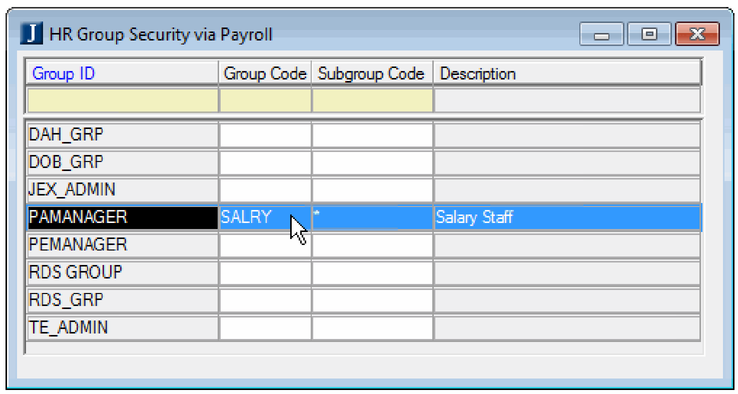
Security works by locking the tabs on the **HR Employee Master via Payroll** window for specific groups you wish to limit access. Without security, anyone with access to the HR Employee Master window could see the personal and financial information for all employees.

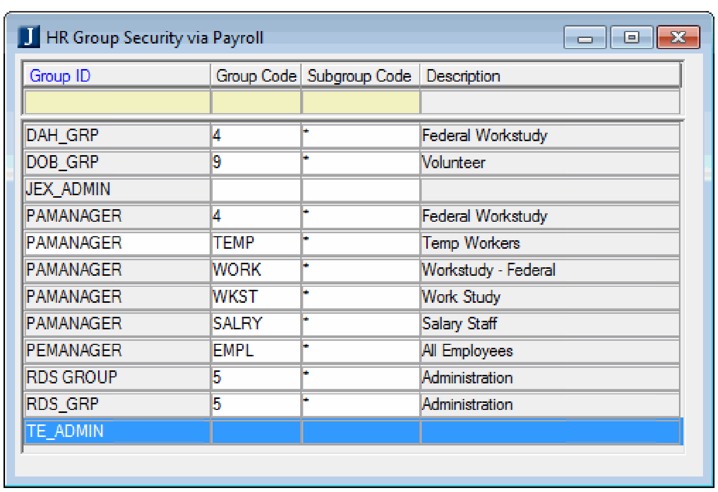
To apply security, right-click on the Group ID you wish to apply and then select ***HR Group Lookup*** to open the **HR Group Select** window.



You can choose which group you want to secure. Click ***OK*** once you have selected the ***HR Group***.

You will see your selection appear in the Group Code column. Now, when an individual tries to open an employee file they do not have the correct permissions for, they will receive an error stating they do not have access.





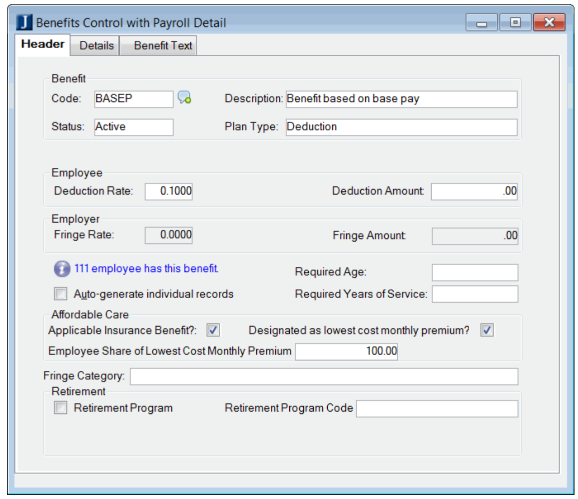
If you have a group that needs access to two or more group codes, you can simply add the Group ID multiple times on the **HR Group Security via Payroll** window.

If you want a Group ID to have access to everything, leave the Group Code blank.

If you are a member of more than one group, your permissions will be determined by the group you use to sign into EX.

Benefit Control with Payroll Detail

All benefits have a code and description, and from this window, you can control the details of the benefit codes. Benefits will include deductions, fringes, and other earnings (accruals) such as health care, 401K, and dependent care.



On the **Benefits Control** window, you can add, edit, or view your current benefit codes. To add a new benefit, right-click and select ***Add Row***. If you need to view or edit an existing benefit you can right-click and select ***Benefit Code***.

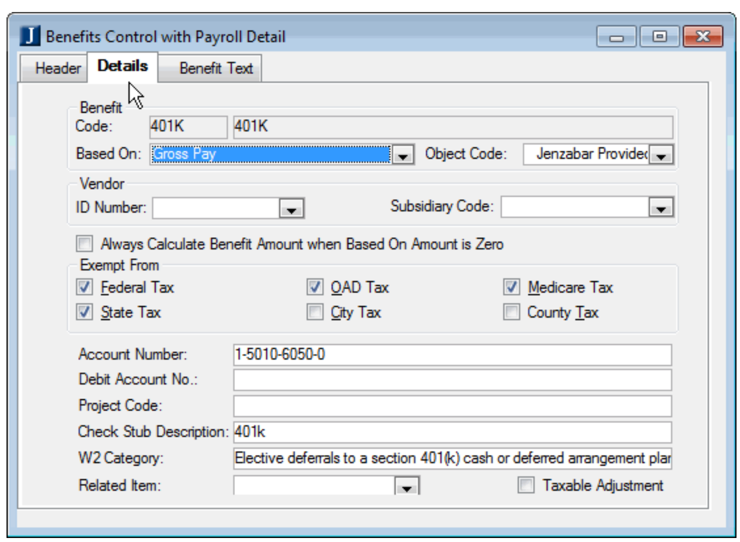
In the **Employee** section, you will notice Deduction and Fringe rates and amounts. These fields may be empty if your employees have an option for the amount they want to contribute. If there is a flat amount that all employees would pay for a benefit, then you would enter the rate or amount in this section.

Towards the bottom of the window, you will notice a checkbox for ***Auto-generate individual records***. If you check this box, the benefit code identified will automatically appear in the code options for every individual in your ***HR Employee Master*** window.

The system will automatically apply the code to all new individuals; it will not distinguish between employees and work-study students.

If an employee already exists, checking this checkbox will not add the benefit to their record. You will still have to manually add the benefit to your existing employees.

If you are working with Payroll, when you select a benefit code, you will notice that two additional tabs are available on the window.



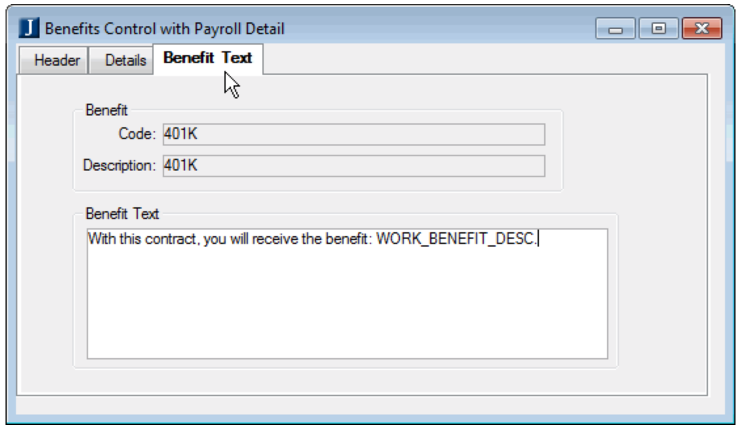
The **Details** tab will allow you to enter additional information that is required to accurately account for benefits and taxes.

In the middle of the window, you will notice a checkbox for ***Always Calculate Benefit Amount when Based on Amount is Zero.*** If you check this box, the system will force the benefit to be calculated, regardless of what the benefit calculation is based on for the individual.

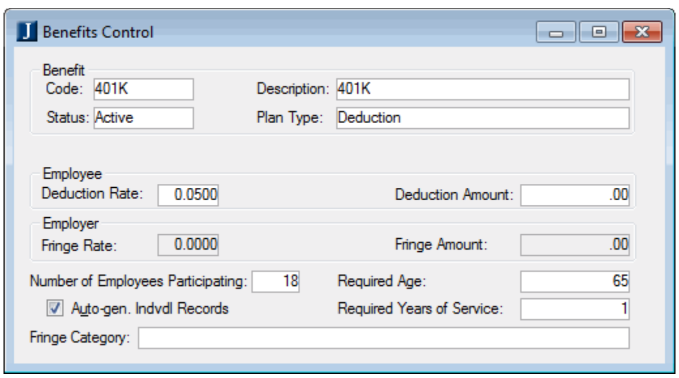
One way you could use this feature, for example, is to process your reimbursements through payroll instead of accounts payable. To do that, you would process the reimbursement as a negative deduction and select the ***Always Calculate Benefit Amount when Based on Amount is Zero*** checkbox so even if the employee's primary gross was zero, you could still generate a check to include the reimbursement.

The **Benefit Text** window is used in conjunction with the Employment Contracts functionality. Any text you enter here will appear on the *Employment Contract*, *Contract Audit Report*, and *Contract Error Report*.

While you can customize your text, there is a default statement setup to ensure the benefit description appears on the contract.



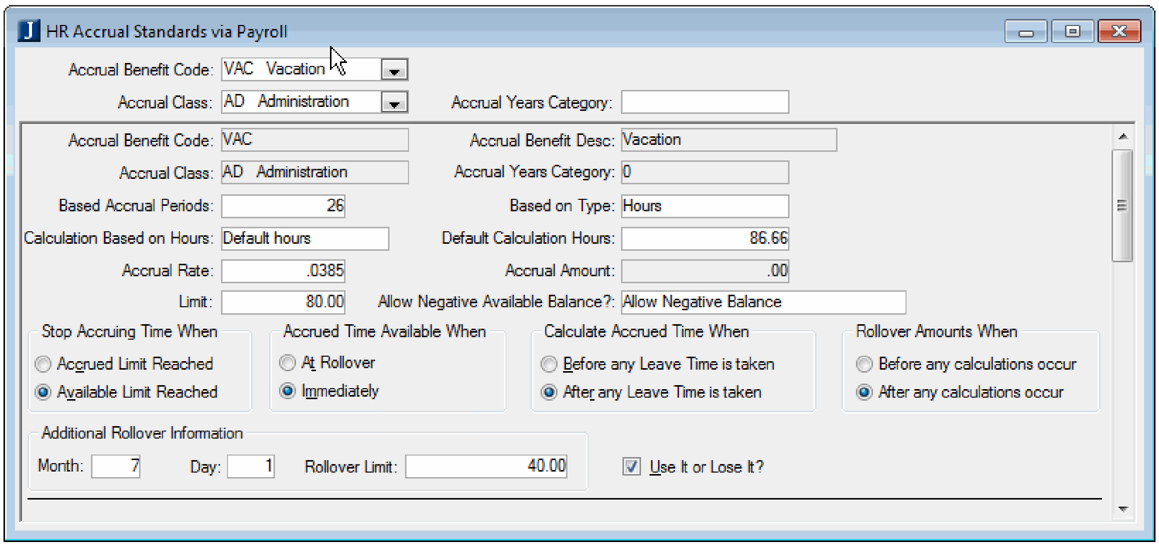
If you need to delete an unused benefit, you can right-click to Delete.



You are also able to access the Benefits Control window from the Personnel module; however, when viewing the window through Personnel you will only be able to see information from the Header tab.

HR Accrual Standards via Payroll/Personnel

This is the window where you will identify time off codes (vacation, sick time, personal, etc.) and define the regulations and policies about how your employees will accrue benefits.



The Accrual Class drop-down options can be maintained by right-clicking on the ***Accrual Class*** and selecting ***Maintenance Screen***. From the **Maintain Table Values** window, you can adjust the codes according to different groups you need for your employees (half-time, part-time, full-time, etc.). You can setup the accrual rates and limits, and determine when and how the accrual happens. There is also an option to allow employees to have a negative available balance, but you will need to review your school's policies for time off before choosing an option.

To setup how your accruals will work, there are several radio button options you need to select:

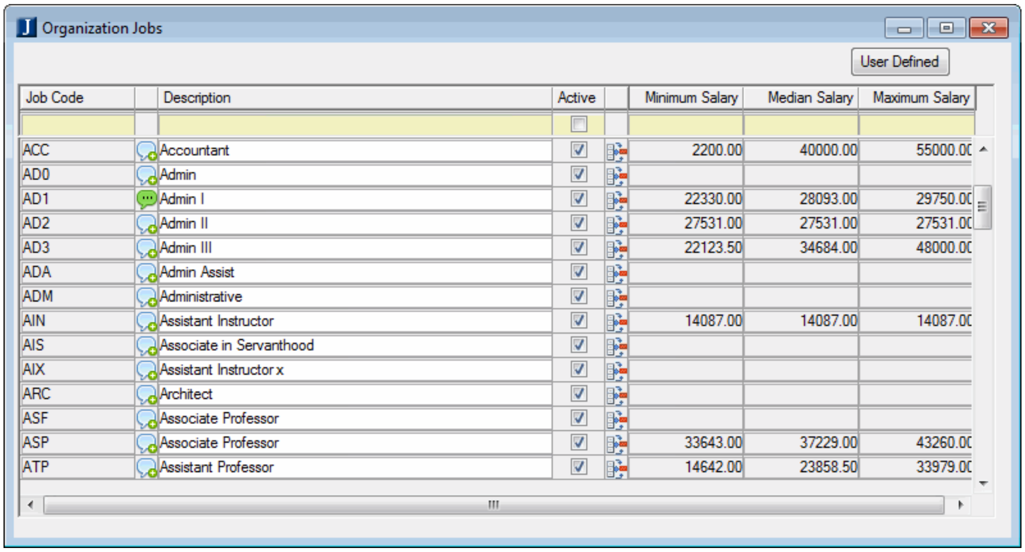
- ***Stop Accruing Time When:*** determines if the system looks at the Available amount or the Accrued amount on the individual's record to determine if they can accrue more time
- ***Accrued Time Available When:*** decide if the accrued benefit hours are available for use as soon as they are accrued, or if they are added after the accruals are rolled over
- ***Calculate Accrued Time When:*** this option determines if the time taken is subtracted from the available amounts before or after the accrual run
- ***Rollover Amounts When:*** determine if you want to have rollover occur before or after accrual calculations are done

At the bottom of the window, there is a section for ***Additional Rollover Information*** that will determine how to handle rollover time. You can choose a specific date for the rollover to occur such as the new year (January 1) or you can leave the Month and Day fields blank, and the system will automatically use adjusted service date and if that field is blank then it will look at the employee's original hire date. In this section, you can also set a limit for the number of hours an individual can rollover. If you want to set a specific number of hours, such as 40.00, you can simply enter the amount. If you want to allow an unlimited number of hours, you would enter all 9's (999999999.99), or if you do not want to allow rollover, you can enter 00.00.

The ***Use It or Lose It*** checkbox will serve as a reminder to you that any accrued time not used by the end of the year will be lost and not carried over to the next year. While this can be a helpful reminder, the system will not subtract any benefit hours based on this checkbox.

Organization Jobs

In the **Organization Jobs** window, you will define categories for past, current, and future job positions at your school. You will create job codes that can be attached to positions for classification, add comments, assign job competencies (), and activate/inactivate the job codes.



Organization Jobs

User Defined

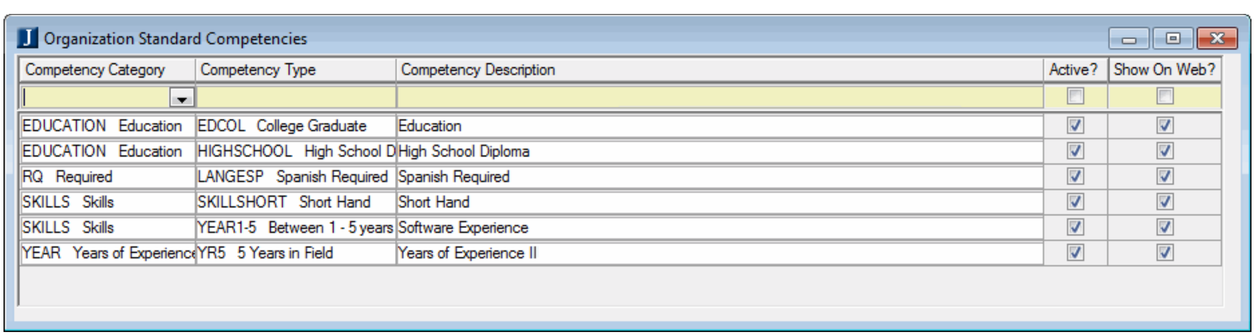
Job Code	Description	Active		Minimum Salary	Median Salary	Maximum Salary
ACC	Accountant	☑		2200.00	40000.00	55000.0(
AD0	Admin	☑				
AD1	Admin I	☑		22330.00	28093.00	29750.0(
AD2	Admin II	☑		27531.00	27531.00	27531.0(
AD3	Admin III	☑		22123.50	34684.00	48000.0(
ADA	Admin Assist	☑				
ADM	Administrative	☑				
AIN	Assistant Instructor	☑		14087.00	14087.00	14087.0(
AIS	Associate in Servanthood	☑				
AIX	Assistant Instructor x	☑				
ARC	Architect	☑				
ASF	Associate Professor	☑				
ASP	Associate Professor	☑		33643.00	37229.00	43260.0(
ATP	Assistant Professor	☑		14642.00	23858.50	33979.0(

The minimum, median, and maximum salary amounts cannot be changed on this window. These amounts are pulled from employee positions attached to a job code.

While the most obvious method of creating job codes is to use generic types (such as Admin or Instructor), you could also create the codes by department (such as English or IT Department). How you organize is up to your school, but there are many methods that can help with organization and reporting.

Organization Job Competencies

When defining organization positions, you can assign desired or required standard competencies for employees filling the position. You will need to setup your standard competencies on this window first before assigning them to specific job codes on the **Organization Jobs** window. If you want the codes to become active, you need to make sure the ***Active?*** checkbox is selected. If you want the competency to be available in CRM Staff, you need to select the ***Show On Web?*** checkbox.

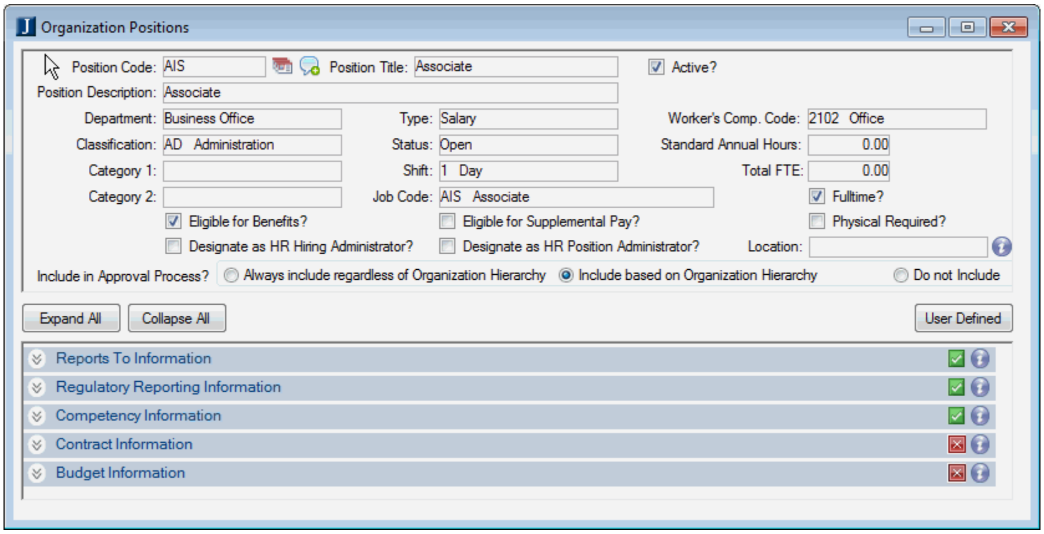


Organization Standard Competencies

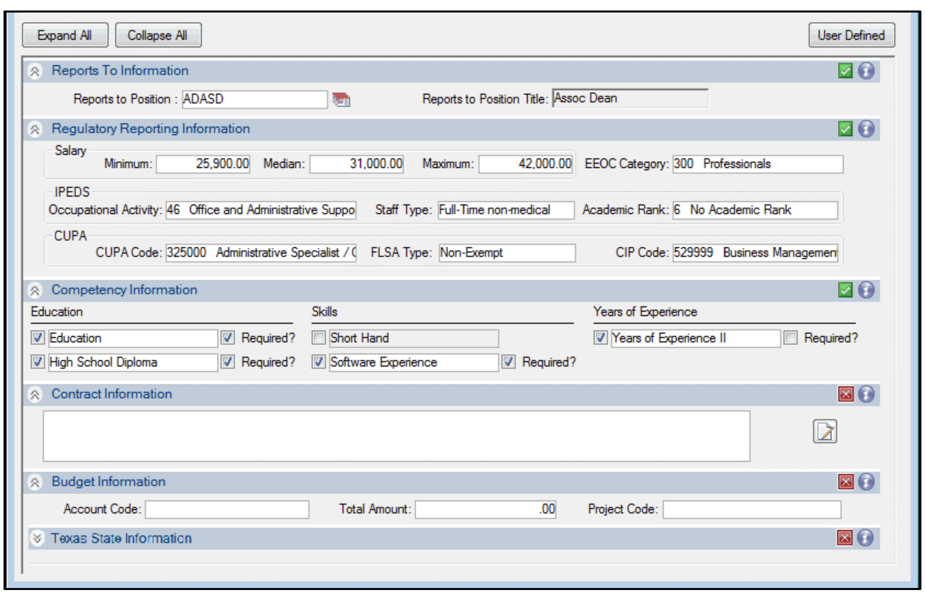
Competency Category	Competency Type	Competency Description	Active?	Show On Web?
EDUCATION Education	EDCOL College Graduate	Education	☑	☑
EDUCATION Education	HIGHSCHOOL High School D	High School Diploma	☑	☑
RQ Required	LANGESP Spanish Required	Spanish Required	☑	☑
SKILLS Skills	SKILLSHORT Short Hand	Short Hand	☑	☑
SKILLS Skills	YEAR1-5 Between 1 - 5 years	Software Experience	☑	☑
YEAR Years of Experience	YR5 5 Years in Field	Years of Experience II	☑	☑

ORGANIZATION POSITIONS

From this window, you will organize and maintain specific positions at your school. Further defining the Organization Jobs, in this window, you will create specific job titles and positions. In addition to the traditional classification, type, and status fields, this window will also allow you to attach departments or supervisors to positions.



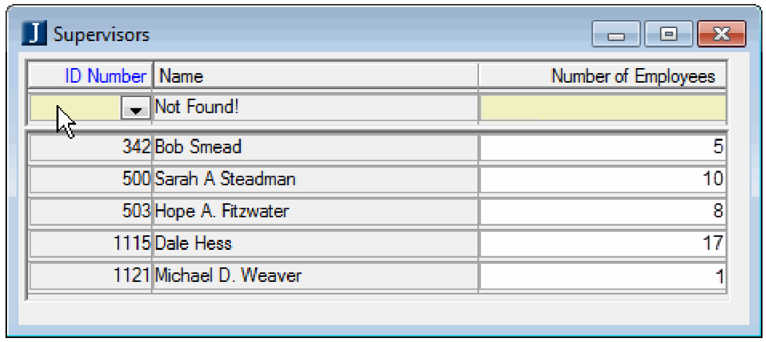
On the bottom portion of the window, you will see several collapsible fields. You can expand these sections to add additional information for the position. If you look at the icons to the right of the sections, you will notice either a or a icon. These icons simply let you know if there is any information in the collapsible sections.



Each employee must be in an available/active position.

Supervisors

On each position, you can attach a supervisor. This table becomes very important if you are allowing your employees to enter their time on CRM Staff because the supervisor will need to approve their timesheets. If you are not using CRM Staff, assigning supervisors is optional, but can be a helpful feature for running reports.

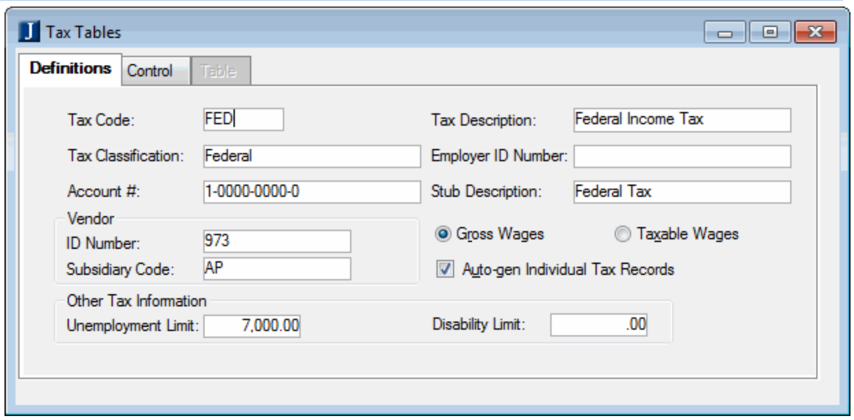


If you are working with CRM Staff via JICS you will need to setup this table.

Tax Tables

You will need to check your tax tables annually to ensure the tax rates are the same year-to-year.

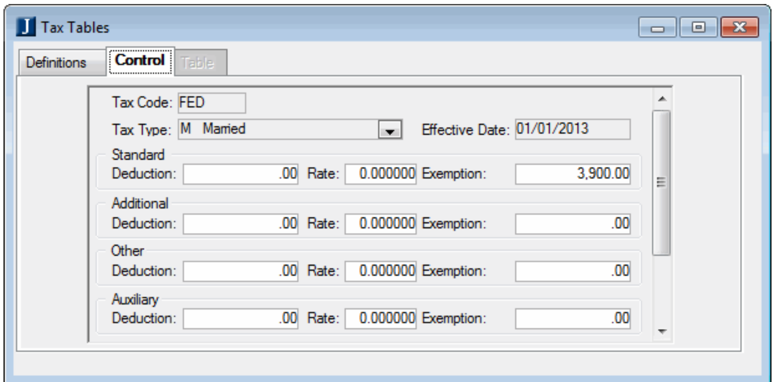
On the **Definition** tab of the **Tax Tables** window, you can create a new tax code, or you can open an existing code by right-clicking on the Tax Code field and selecting the ***Tax Code*** option. When you open an existing tax code, you can edit or delete the information.

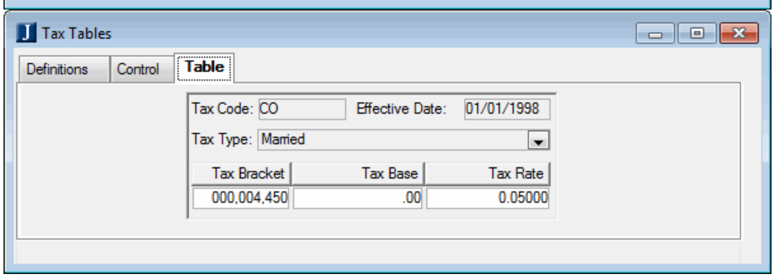


Jenzabar will maintain the federal taxes and send out service packs mid-December so that all of your tables will be ready for the next year.

State level taxes will be your responsibility. You will need to go into the tax table and check the rates at the beginning of each year.

On the **Control** tab of the **Tax Tables** window, you will be able to define the filing statuses that employees can use for a specific tax code. Once the tax codes and filing statuses are defined, you can set the tax limits and percentage rates on the **Table** tab.



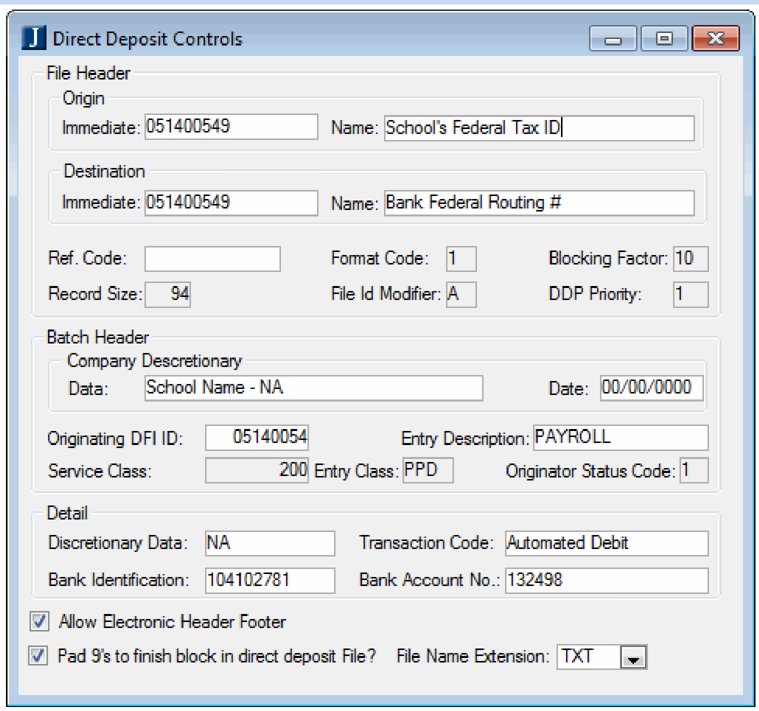


To access the Table tab, you must select a filing status from the Control tab.

Direct Deposit Controls

Use this window to setup and allow direct deposit transactions from your organization into the employee's bank account.

You should only need to change information on this window if your organization changes banks, or if your bank changes their requirements.

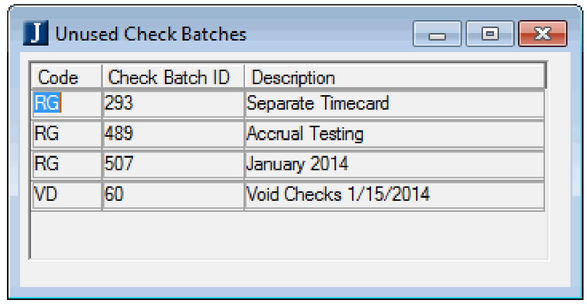


Work with your banker to enter the information required. Your banker can also tell you what type of magnetic media is required.

UNUSED CHECK BATCH

From this window, you can review and delete check batches that have not yet been updated in the system after creating checks, direct deposits, and registers.

This window should remain empty. If you leave unused batches, the system will add the amounts to your totals. The only batches you should see in this window are your current, active batches.



Do not delete an active batch you are currently working with.

Chapter 4. Working with Employee Records

When working with HR, it is important to keep the information on your employees up to date. This chapter will cover the windows you need to use in order to work with employee information.

Objectives

At the end of this chapter, you will be able to:

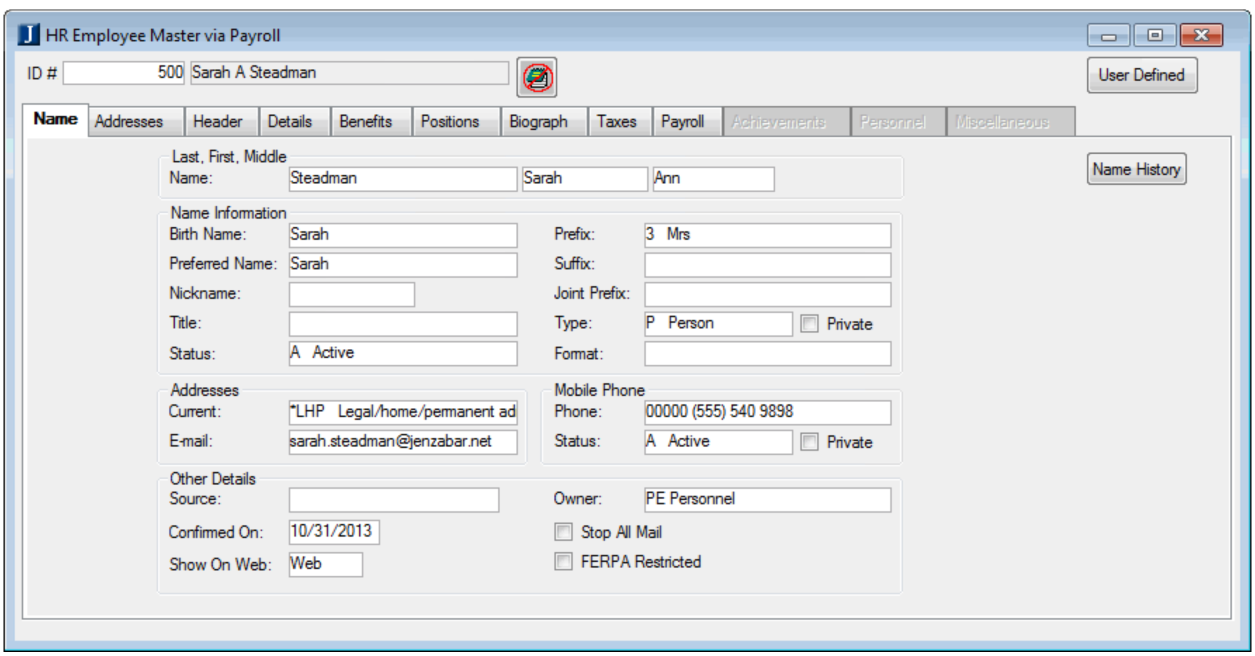
- Work with the employee master
- View employee profiles and pay checks
- Distribute salaries and fringes
- Create contracts

HR Employee Master

Use this window to enter information needed in both the Payroll and Personnel modules for your organization's employees. You should complete the fields with as much detail as possible to ensure your HR processes will run properly.

> If you need to enter a new name, you should always check Name Master before adding a new entry to avoid duplicate entries.

HR Employee Master via Payroll



The Achievements, Personnel, and Miscellaneous tabs are only active if your school also purchased the Personnel module and you have valid permissions. If you have both the Payroll and Personnel modules, all tabs will be available if you have the permissions. You will not have to switch between the via Payroll and via Personnel windows of the HR Employee Master.

There are twelve tabs on the **Employee Master** window:

Name

Information on Name tab is being pulled from the Name Master table, however you can edit existing information or add a new record. There is also a Name History option that will show you all the changes made to the name.

You must have a valid ID# with all information saved before you can access other tabs on this window.

Address

Pulling information from the Maintain Address window, the Addresses tab allows you to view and edit the addresses for the user. The Address History option will track any changes made to the individual's address information.

Header

The Header tab holds the group and subgroup information. Each individual must belong to a group and subgroup, and can only belong to one group and one subgroup code. On this tab, you will determine full-time or part-time and whether the employee is active or inactive. You will also notice several checkboxes to indicate if the employee has a pension plan, has received their W4, or is a former student or employee.

Details

Details tab holds data relating to accrual benefits, contracts, and I9 details.

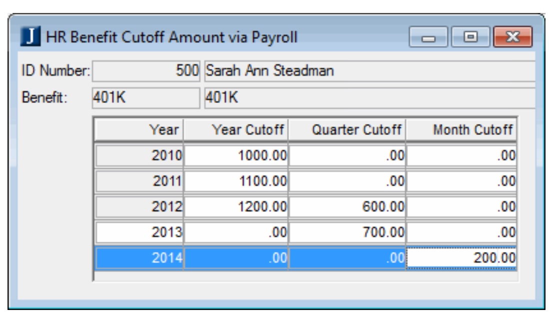
Benefits

Benefits tab will allow you to enter benefits information for an employee, such as benefits received, additional withholding, accruals, and special benefit rates. You can add benefits to an employee by right-clicking to ***Add a Row*** using the drop-down box to select the benefit. The benefits available are determined on the **Benefits Control** window.

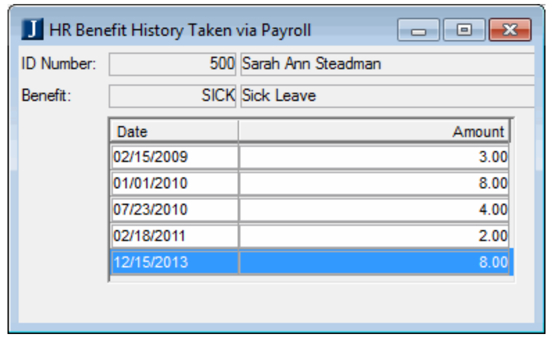
If you want a benefit to start at a later date, choose ***Inactive*** in the Status field and add a Start Date to indicate when the benefit will begin. This is a good option when you have a probationary period for new employees.

While on this tab, you can right-click for more options.

- When working with Gifts, you can right-click to ***Gift Number/Gift Group Lookup*** to find available options. This information will then link to the Development module so the gifts can be taken from the employee's pay.
- You can use the right-click option for the ***Cutoff Amounts*** to define the amounts for a benefit within a calendar year. The cutoff amount cannot be exceeded within the designated time frame.



- When you are looking at other accrual items such as Vacation, you can right-click to go to the **History Taken** window that will show a list of all time taken by the employee.

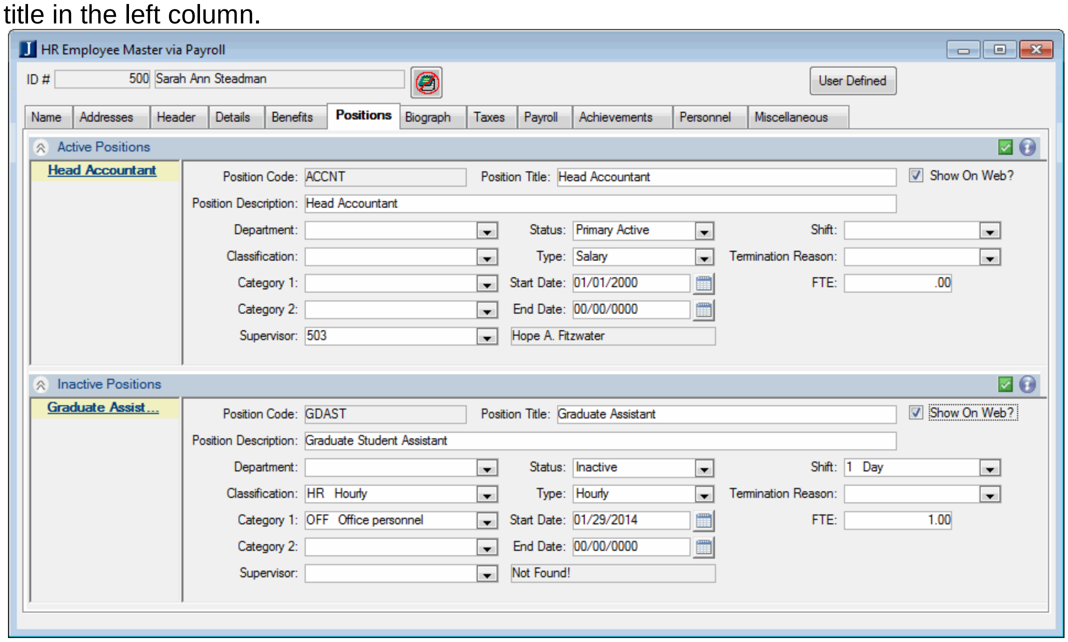


You will have to enter this data manually into the system.

Positions

Positions Tab is used to review or assign positions to an employee, and will describe what the employee does at your school. This window is broken into Active and Inactive positions. The active position is one (or more) job the employee currently holds. Inactive positions are jobs the employee used to have at your school.

For example Sarah Steadman was Graduate assistant before becoming the Head Accountant after graduating. Any available positions are listed in the left column under Active or Inactive positions. To view details about a specific position, select the position title in the left column.



An employee must have at least one position to be paid using the Payroll module.

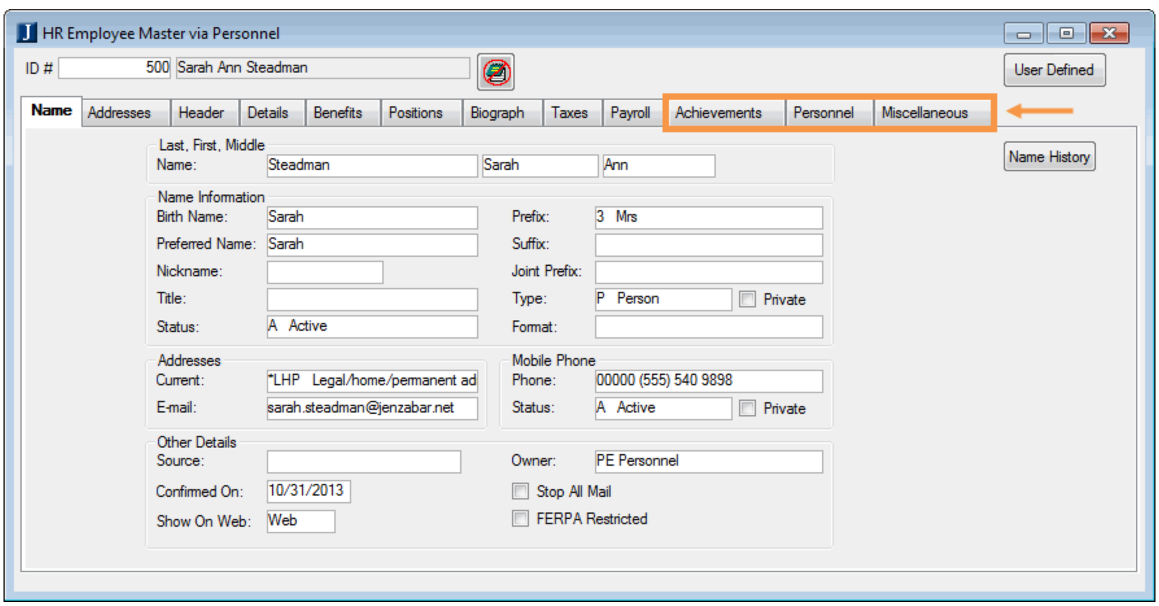
Biograph

This tab is used to enter personal demographic information about an employee. This tab holds the same information as the **Maintain Biograph Information** window stored in the the Biograph Master table.

Taxes	You will use the Tax tab to record taxes that will be withheld for each employee. You will be able to determine the employee's filing status and whether they are exempt from any taxes codes. Prior to adding a tax row for your employees, you need to define the tax codes on the Tax Definition window.
Payroll	This tab contains two sections: Direct Deposit and W2 information. On the first part, you can determine amounts and priority for direct deposits, enter banking information, and set active or inactive status. If an employee that usually receives a direct deposit requests a check, you can select the ***Create a check for this Direct Deposit*** checkbox, the system will override the direct deposit and create a check when the payroll is run. You will need to go back to this screen and un-check this option to return to the direct deposit option. On the second part of the window, you can view the W2 history information and you can add information on the employee's W2 form that may have been missed.

HR Employee Master via Personnel

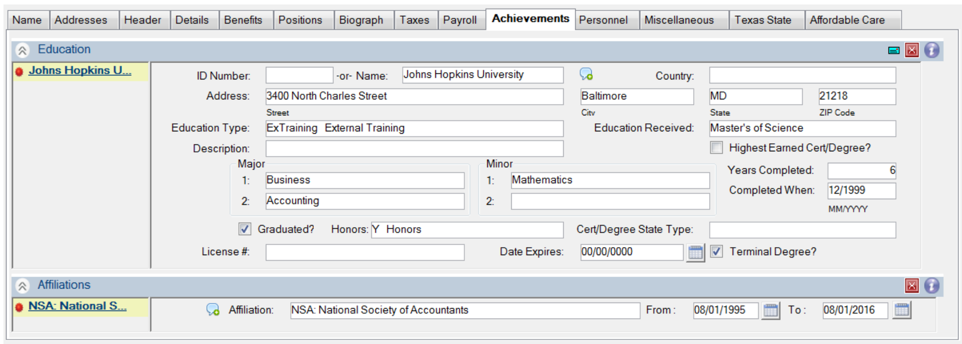
This window is the same as the HR Employee Master via Payroll window, however there are three additional tabs available only available through the Personnel module.



The Taxes and Payroll tabs are only active if your school also purchased the Payroll module and you have valid permissions. If you have both the Payroll and Personnel modules, all tabs will be available if you have the permissions.

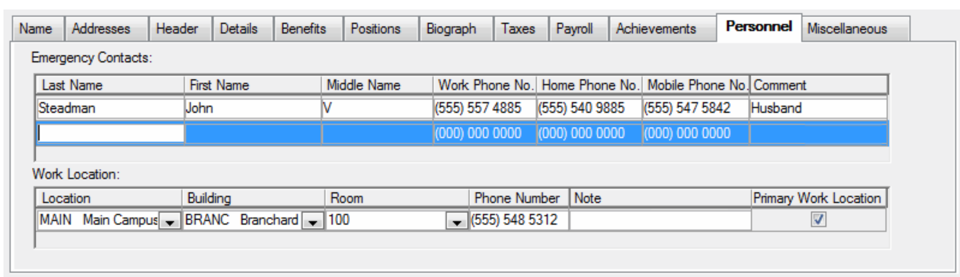
Achievements

This tab allows you to enter professional and educational achievements for an employee. You can add as many rows to this window as needed by right-clicking and adding a row. The **Education** section goes into a lot of detail, including the type of education, majors and minors, etc. Note that in order to enter education into the Achievements tab, the college or university the employee attended will need to be in the Name Master and have an ID Number. The **Affiliations** section is where you could add any professional organizations, accreditations, etc. In this section, you can type any affiliation information.

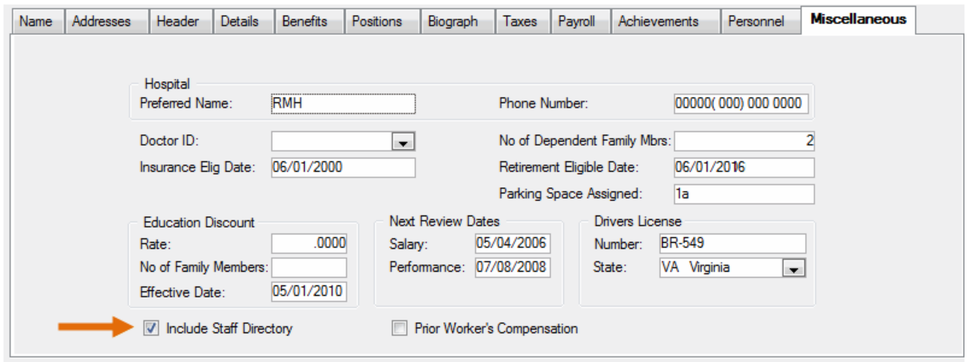


Personnel

The Personnel Tab is used to enter emergency contacts and office locations.

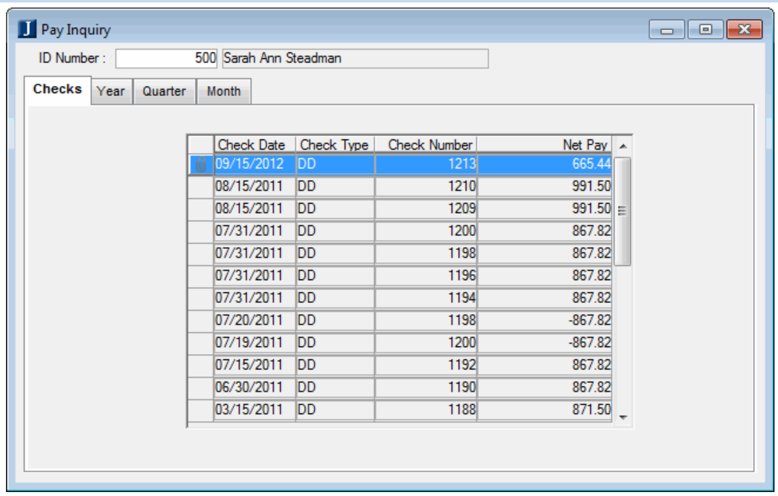


Any emergency contacts entered on this window will also appear on the Emergency Contacts via Personnel window.

Miscellaneous	This tab contains various bits of information including details about the employee's hospital, doctor, dependents, driver's license, tenure, educational discounts, and an option to include the employee in the Staff Directory. 

Pay Inquiry

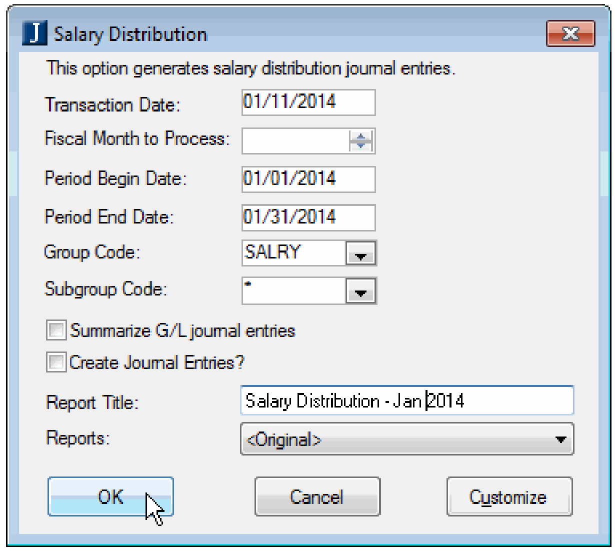
This window will show you the pay history for a particular employee. You can view the employee's pay information by check, year, quarter, or month. In addition, you can use the right-click feature to access benefits, taxes, timecards, and check details. On the **Checks** tab, you may see an attachment icon next to a check date. This icon will allow you to view the pay stub if you have configured the system to create pay stubs.



Salary Distribution

Salary distribution transactions are used to configure an employee's salary expense disbursement over a different number of periods than those in which they are paid.

Use the **Salary Distribution** window to create transactions that distribute salaries for salaried employees for the months in which their contracts are active.

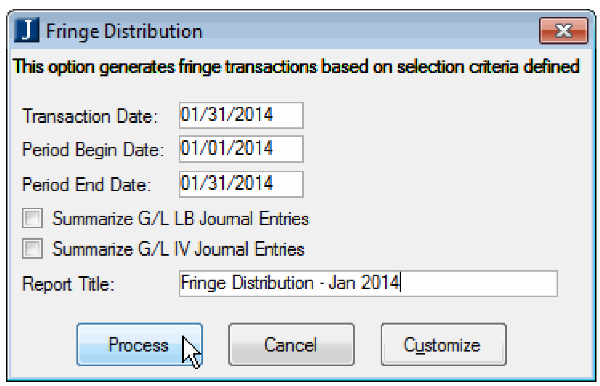


This process is usually run once a month.

Fringe Distribution

You will use the **Fringe Distribution** window to begin generating fringe benefits separate from the normal pay run cycle.

This process generates fringe benefit transactions for fringes not created during the pay run process and only uses benefits that have a Plan Type of Fringe ***nonpay run*** on the **Benefits Control** window and are active in the employees Benefits/Accruals window. If the fringe is inactive but the start date is between the Period Begin and Period End dates entered on the **Fringe Distribution** window, this process activates the fringe.



CONTRACTS

In addition to full- and part-time positions, you can also offer your employees contracts for positions that may not require full or even part-time dedication.

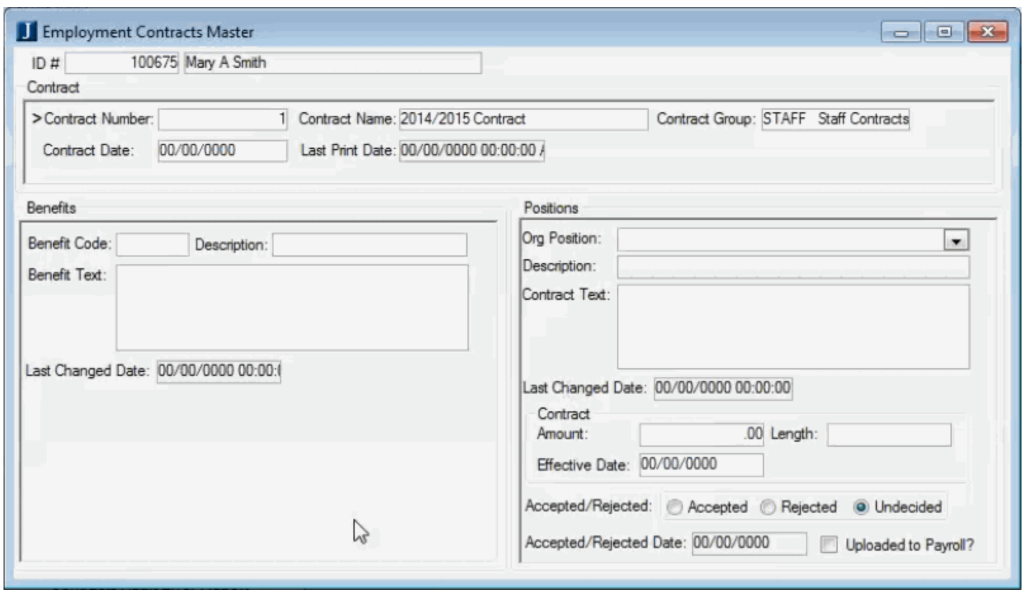
Contracts are designed to work with people already in your system as an employee. You cannot create a contract for a person that is not an active employee.

Creating a Contract

There are two ways you can create a contract. You can add a new contract manually from the **Employment Contracts Master** window to associate Benefits and Contracts with a specific ID Number; or you can generate the contract data from Payroll based on the employee's current position and benefits from the **Generate Contracts from Payroll** window.

Option One: Employment Contracts Master

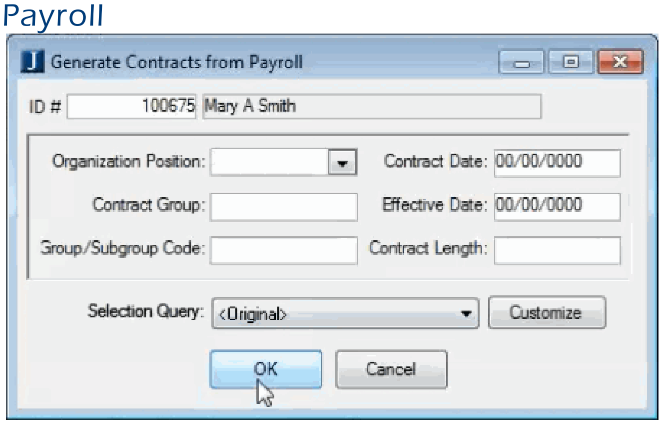
Manually enter contract information into the top portion of the Employment Contracts Master.



Option Two: Generate Contracts from Payroll

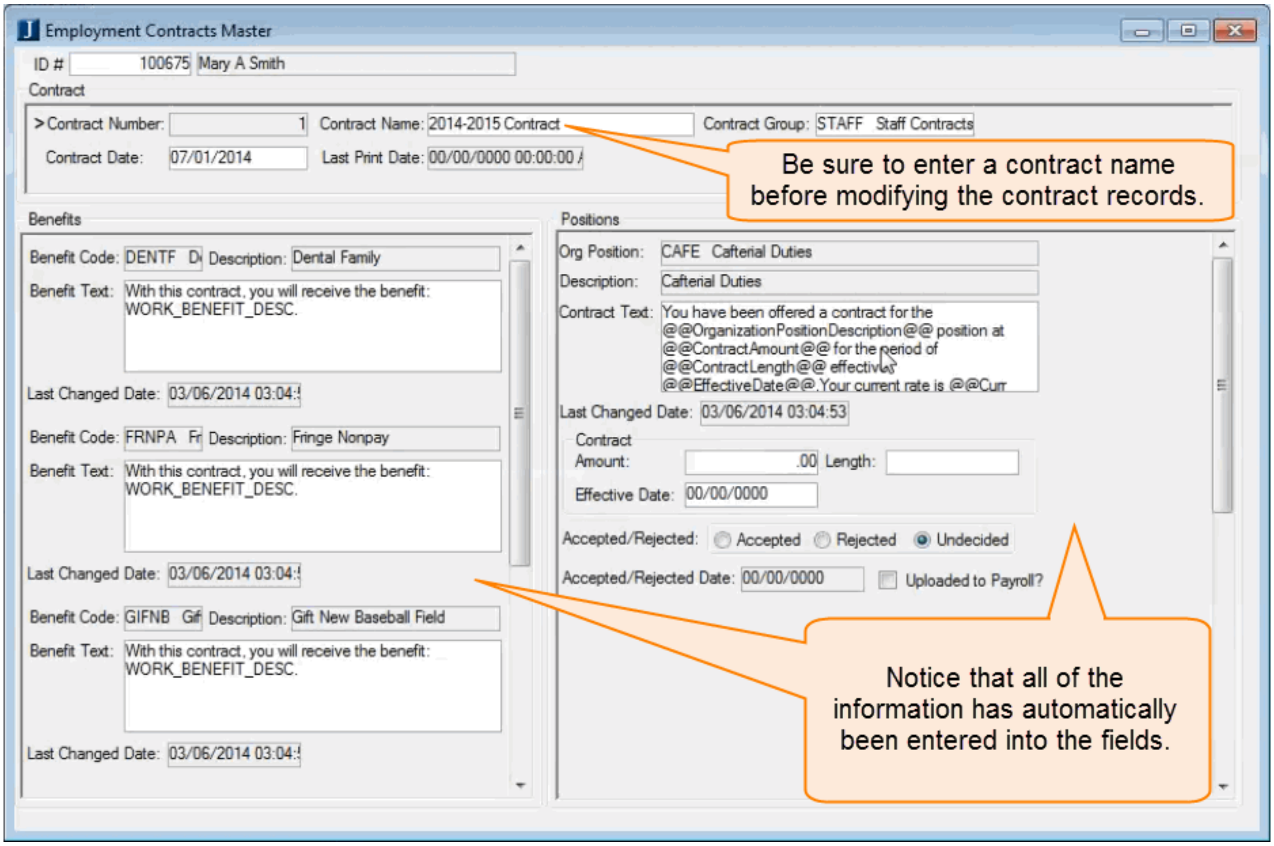
To create a new contract, simply enter an ID number (or group number if you are going to add a contract for multiple people) and click ***OK*** on the **Generate Contracts from Payroll** window to start the process.

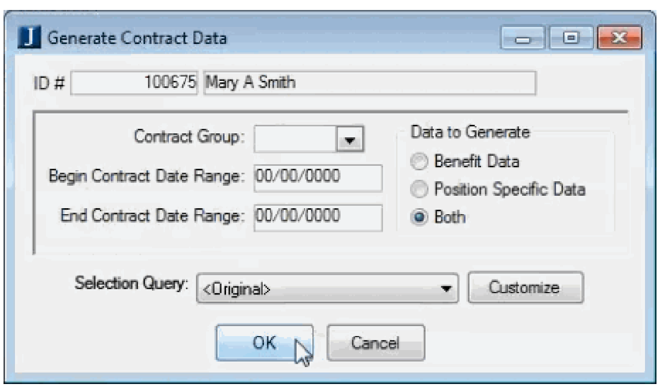
You will receive a message letting you know when the process has successfully completed and you can view your contract on the **Employment Contracts Master** window.



Working with Contracts

Back on the **Employment Contracts Master**, you will see the contract details for the employee.

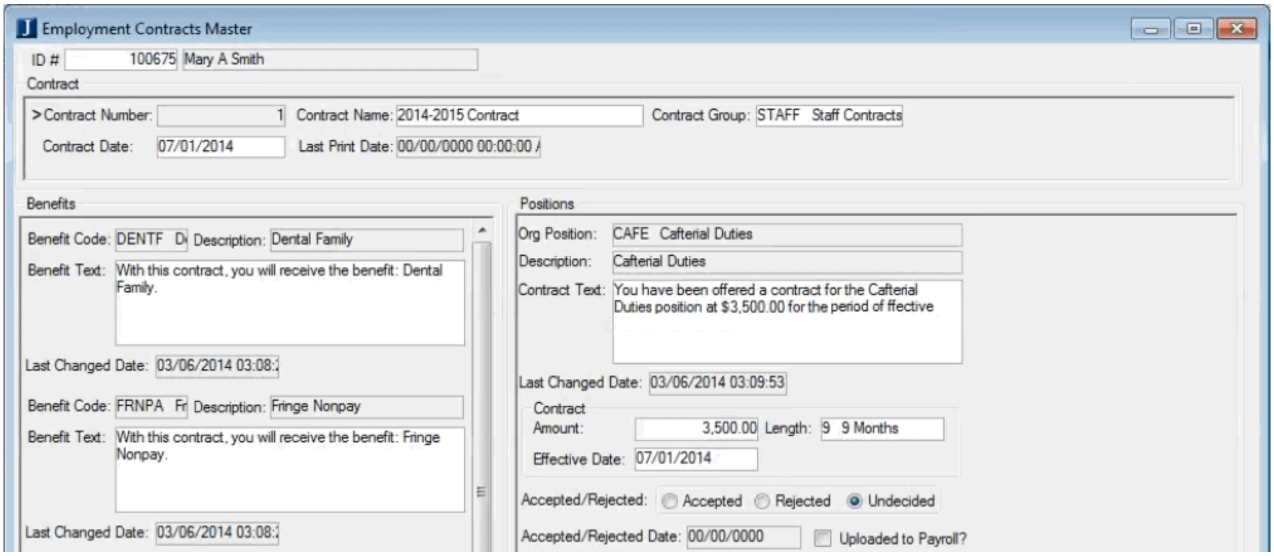




Now that you have all of the contract information on the window, you may want to make the text appear without all the table names and coding. There are two ways to populate the data.

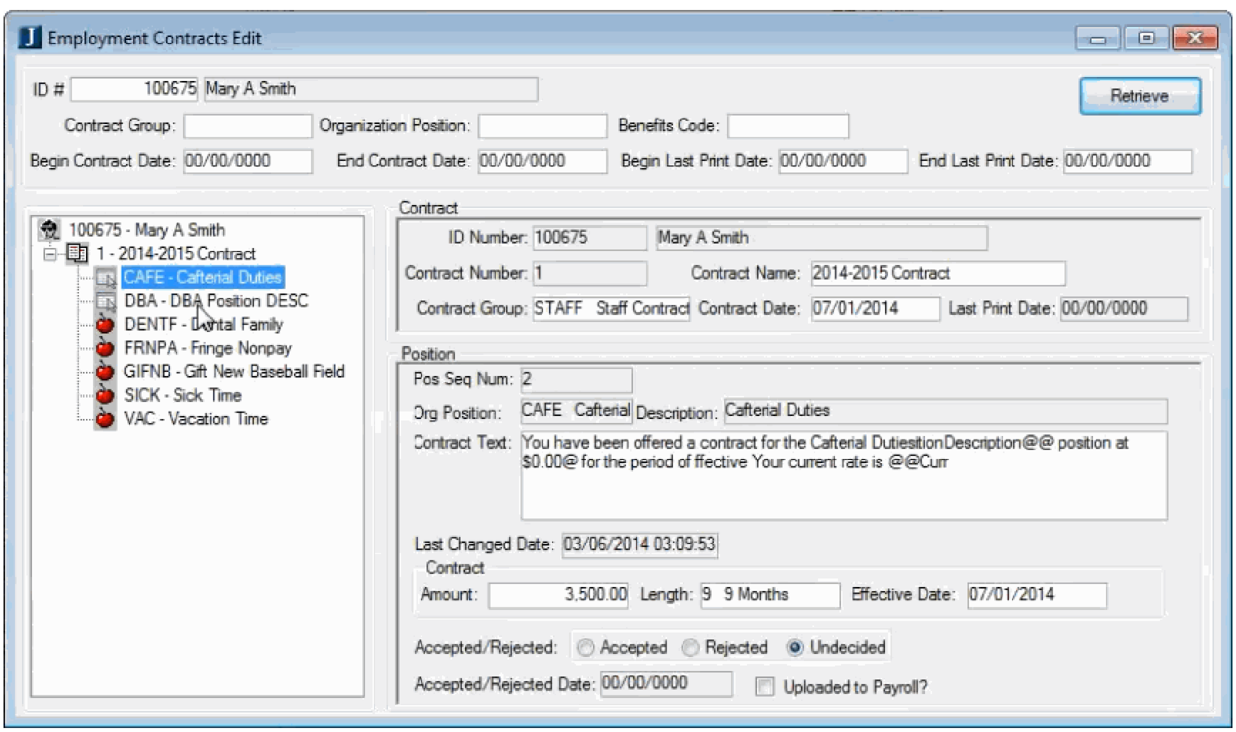
- You can right-click on a field and select ***Update Contracts Benefit/Positions Data*** to update the benefit and position data individually.
- You can also use the **Generate Contract Data** window, enter the employee's ID number and click OK.

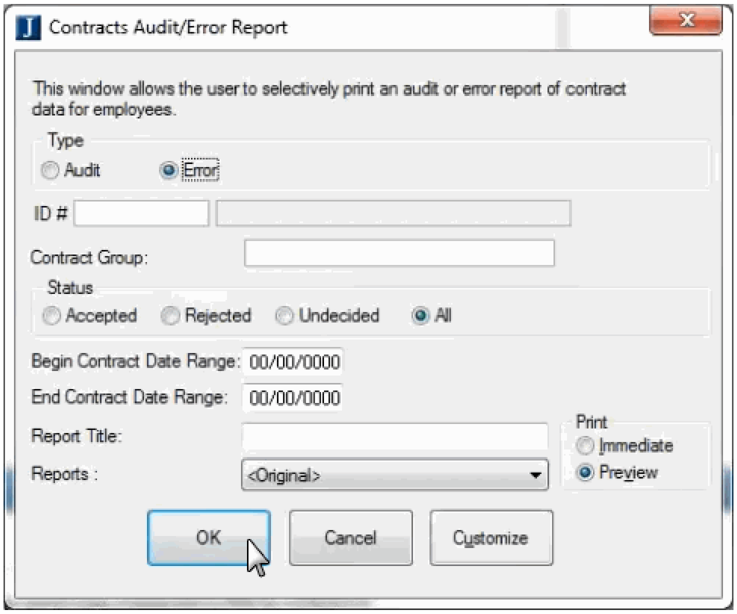
Once you have updated the data for an individual or contract group, where you used to see table information and coding on the Employment Contracts Master widow, you will now see clean and readable information for that contract.



Viewing and Editing Contracts

Once your contracts have been created, you can view and edit contracts for individuals and modify groups of contracts from the **Employment Contracts Edit** window. This is also a nice way of looking at all the contract in a more previewed format.



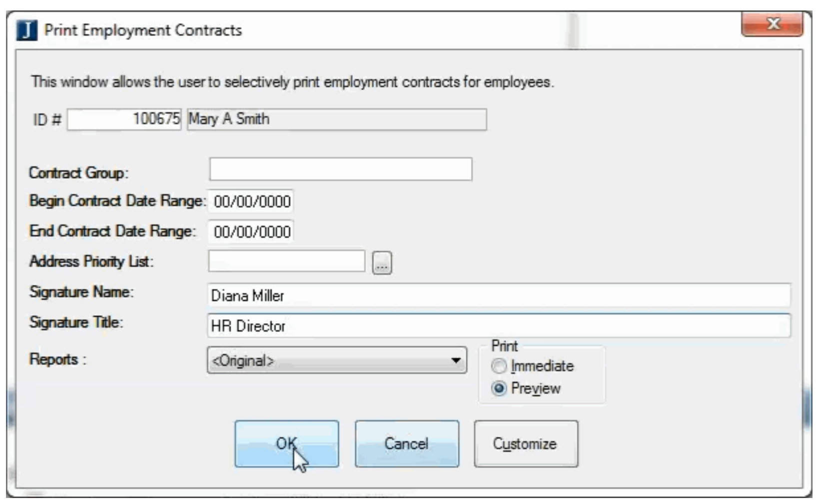


Once you have setup and generated your contracts, you can run the **Contracts Audit/Error Report**. There are two reports you can generate from this window:

- **Audit:** looks at contracts that fit the criteria selected, and allows you to review the information
- **Error:** pulls information from contracts where there may be missing or incorrect data, such as Contract Text, Benefit Text, and Contract Amount

Printing Contracts

Once you have generated the employment contracts and ensured that the information is complete and correct, the final step is to print the contracts for employees. You can print by individual ID numbers or contract groups.



Be sure to enter a Signature Name and Title that will appear at the bottom of the contract letter.

Chapter 5. Processing Payroll

Whether you process payroll once a week or once a month, it is important to follow all the steps in the process. This chapter will walk you through the steps necessary for a successful payroll run.

Objectives

At the end of this chapter, you will be able to:

- Setup pay period checks
- Utilize timecards
- Run the payroll process
- Void checks

Processing Payroll Overview

There is one day that all employees look forward to: Pay Day. While there are many important processes in Human Resources, money is probably one of the most important to your employees. Getting the paychecks out on time and with the correct amount will save you a lot of hassle.

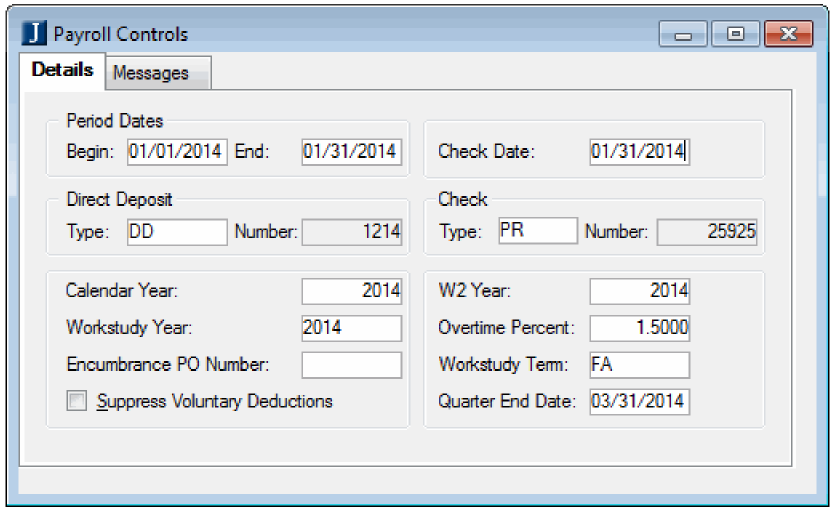
On the right, you will see a quick overview of the steps you need to follow in the Payroll module in order to complete a payroll run.

In the remainder of this chapter, you will follow these six steps in much more detail.

1. Setup Payroll Controls
2. Work with Timecards
3. Generate a Check Batch
4. Print Paychecks & Transfer Direct Deposits
5. Update Payroll
6. Void Checks

STEP 1: SETUP PAYROLL CONTROLS

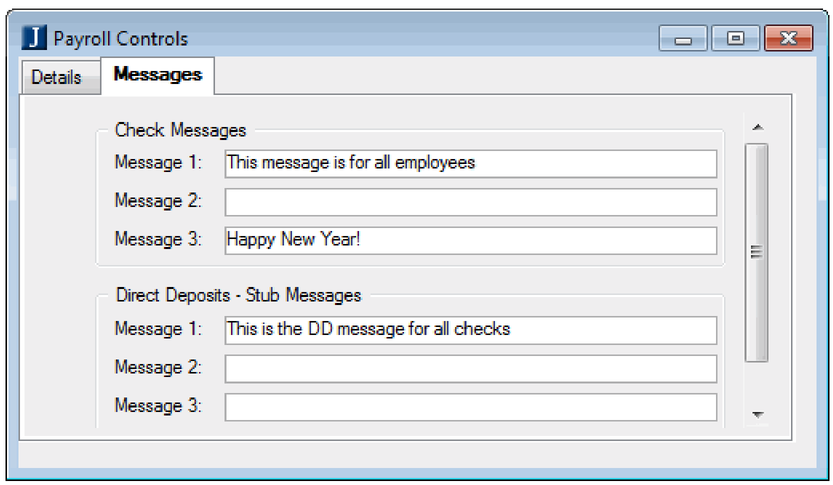
The first step of processing payroll is to make sure your **Payroll Controls** window is updated with the correct information. On the **Details** tab, you will determine the pay period and check dates. You will also need to ensure that the direct deposit and check numbers are correct and that your year and quarter dates are updated to the most recent periods.



If you are running checks for bonuses or other additional pay, you may want to select the ***Suppress Voluntary Deductions*** checkbox that will prevent amounts such as 401K and insurance fees from being removed from the check.

On the **Messages** tab, you can add any notes or comments that will be added to the check or direct deposit.

For example, if it is the first paycheck of the new year, you might say “Welcome back from winter break” or “Happy New Year.”

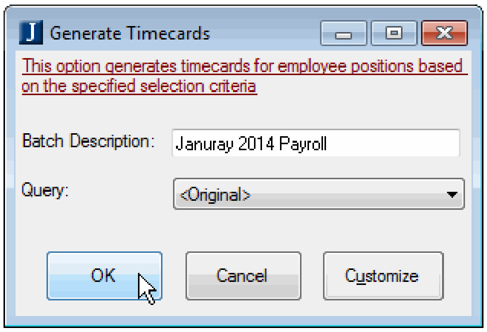


This window does allow you to separate check messages from direct deposit messages.

Step 2: Work with Timecards

Keeping track of an employee's time, is an important feature of the payroll system. Using timecards will allow you to create batches of your current employees for payroll. If you have Jenzabar Internet Campus Solution (JICS) and use the CRM Staff module, you can also setup timecards that will allow employees to enter their work hours online, and assign supervisors to approve their time.

Option One: Generate Timecards

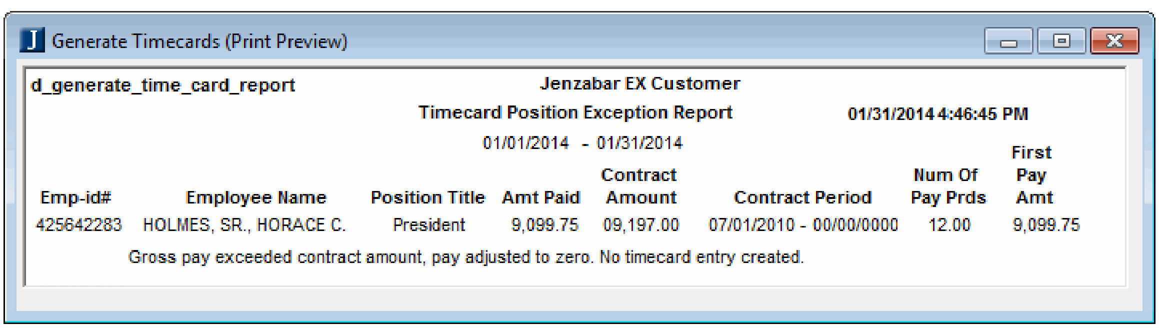


You will use this window to mass generate timecards for employees based on the current position information.

Each time you run this procedure, you will need to create a unique Batch Description to help you distinguish this batch from others later in the payroll process.

*You can create a custom query using InfoMaker by clicking the **Customize** button. Some common custom queries may include work-study, hourly, salary, etc.*

When you click ***OK***, you will receive a report preview with the employees, job and contract information, pay details, and any warnings or notes for each individual. Once you have seen the report, you can check to make sure amounts are correct and then change or adjust as necessary.


Generate Timecards (Print Preview)

d_generate_time_card_report

Jenzabar EX Customer

Timecard Position Exception Report — 01/31/2014 4:46:45 PM

01/01/2014 - 01/31/2014

Emp-id#	Employee Name	Position Title	Amt Paid	Contract Amount	Contract Period	Num Of Pay Prds	First Pay Amt
425642283	HOLMES, SR., HORACE C.	President	9,099.75	09,197.00	07/01/2010 - 00/00/0000	12.00	9,099.75

Gross pay exceeded contract amount, pay adjusted to zero. No timecard entry created.

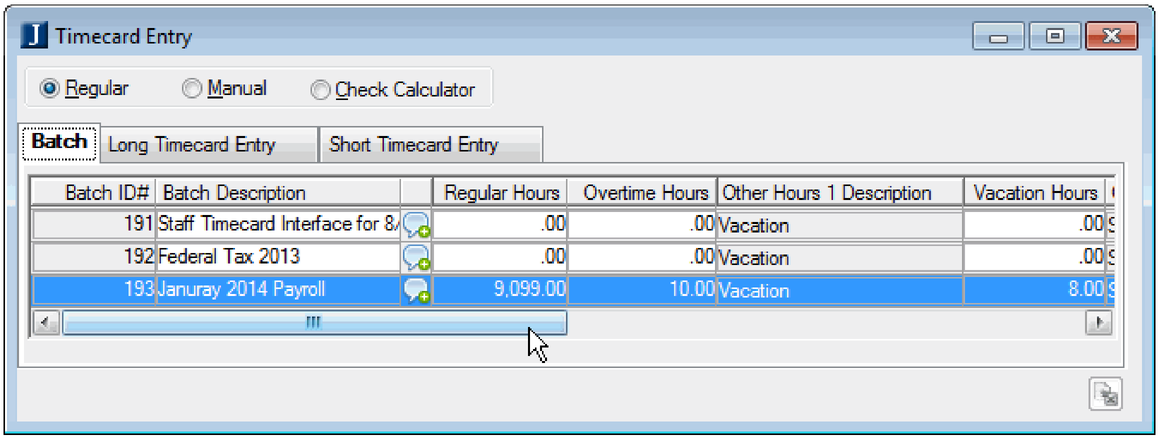
Option Two: Timecard Entry

If you do not want to auto-generate your timecards, and would prefer to take a manual approach, you can use the **Timecard Entry** window to enter employees individually.

You can also use this window to review employee timecards, update existing timecards, and manually enter new/additional timecards after you have run the Generate Timecards feature.

When the window opens, you will see the ***Batch*** tab where your batches will be listed, and you can setup the Batch tab to show what amounts of Regular, Overtime, and Other hours you should have on your timecards for the batch.

These amounts are what the Validate Hours feature will check against when reviewing your batches.

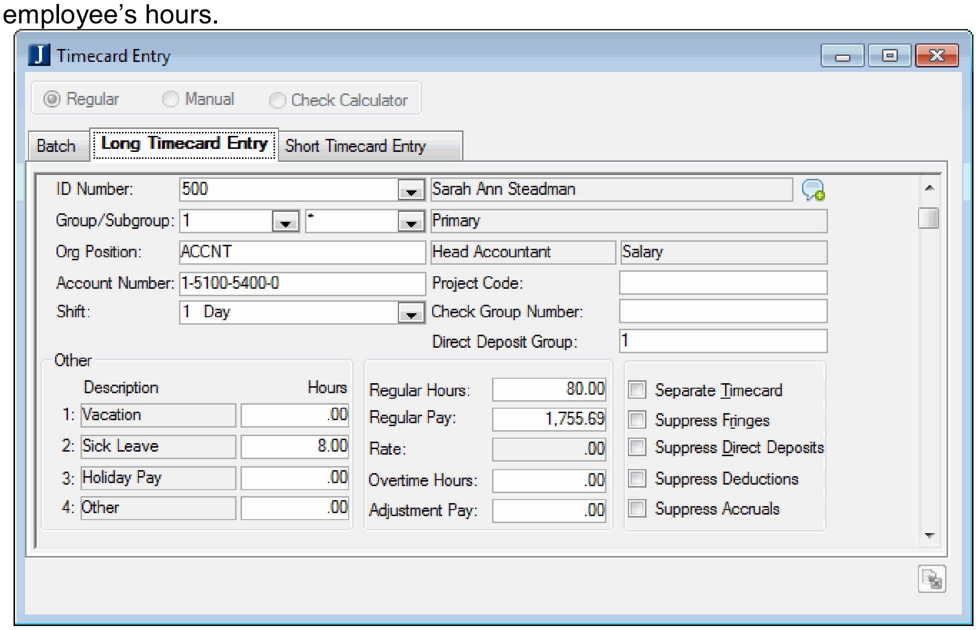


This window may look different depending on the *Validate Hours* setting from the Configure Payroll window.

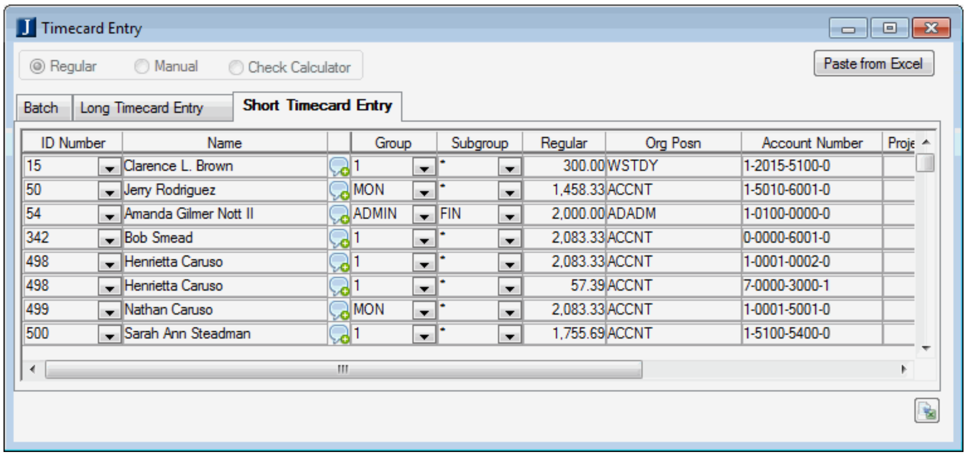
At the top of the window, you will notice three radio button options: select ***Regular*** for the timecards to be used in the pay run, ***Manual*** if you need to record a manual check that has already been issued, and ***Check Calculator*** if you want to preview the check without actually paying the employee.

When you go to the ***Long Timecard Entry*** tab you will see information about each individual and the hours they have accumulated during the pay period. Notice how the individuals differ based on salary or hourly pay.

On an individual's timecard, you will see several checkboxes that will allow you to separate timecards or suppress items. You can also add or remove employees from the timecard batch, as well as record or update the employee's hours.



On the ***Short Timecard Entry*** tab, you will see a summarized list of all your employees and their timecards. You will see overall information for the employees with their regular and overtime hours and any adjustments.



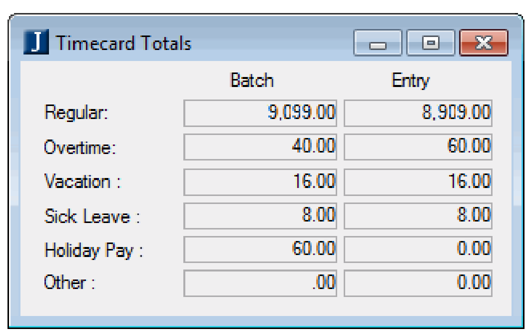
For each active position the individual has, you will see a separate timecard. Therefore, if an employee has three positions at the school, they will have three timecards listed.

While on the **Long** or **Short Timecard Entry** tabs, there are several right-click options you can utilize:

- **HR Group Lookup**: will allow you to search and select an HR group for the employee
- **Separate Timecard Benefits/Taxes**: will separate tax and benefits from pay received and allow you to make changes to the rates or amounts for benefits and taxes (to use this feature, you must check the Separate Timecard checkbox on the Long Timecard Entry tab)
- **Timecard Selection**: allows you to choose which position/salary record you are going to pay
- **Timecard Sort/Select**: provides you with a quick way to jump to a specific employee timecard
- **Timecard Other Pay**: this shortcut will open a window for the individual, and you can select the type of benefit, amount of time used, and the date the time was taken

Be aware that selecting Separate Timecards will cause taxes to be calculated differently than grouping multiple timecards together.

If you selected ***Warning*** on the **Payroll Configuration** window, when you close the Timecard Entry window, the **Timecard Totals** window will appear. This is a check window, allowing you to see how the totals you entered on the **Batch** tab add up to the actual hours in your timecards. If these totals do not match up as expected you will need to go back through your timecards until the numbers match.



If you selected ***Error***, in addition to seeing this window, you will receive an error message letting you know that you must correct the issues before you can continue.

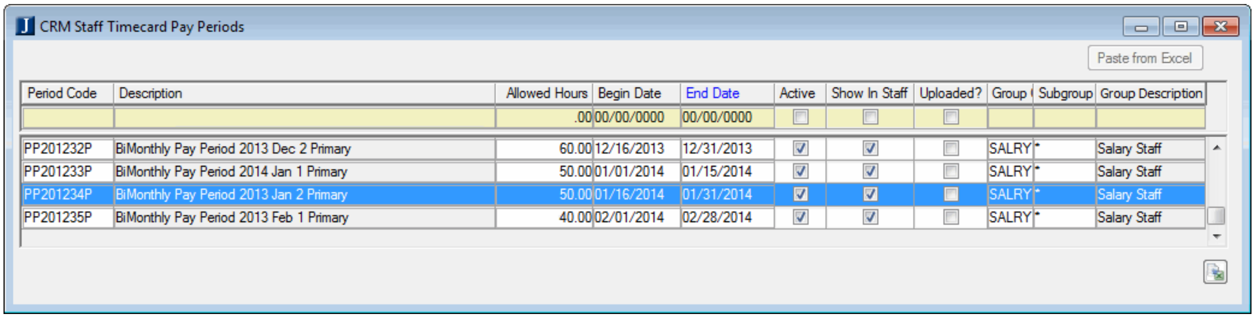
If you selected ***No Check***, the system assumes all timecards are correct and will continue without showing you this window.

Option Three: Timecards in CRM Staff

If you will be using the JICS CRM Staff portlet for your timecards, you will need to setup pay periods in EX and the actual timecards in JICS.

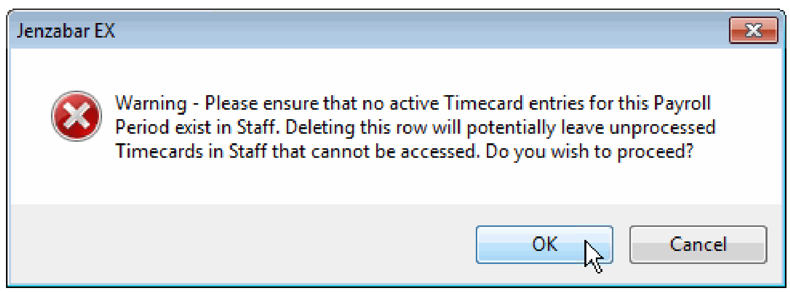
CRM Staff Timecard Pay Periods

This window will configure the available timecards for your employees. You can set the number of allowed hours, pay period dates, and make the timecards active and visible on CRM Staff.



Similar to the Payroll Control window, the **CRM Staff Timecard Pay Periods** window will create batches for the pay period specified. Each row in this window becomes a batch and will remain in the list unless you delete the row.

If you no longer need a pay period, you can delete it by right-clicking to ***Delete Row***. You will receive a warning making sure you do not delete current timecards, but if you are sure you no longer need the pay period click ***OK*** to continue.



If your salary staff is not required to enter their time into a timecard daily, then maybe you only create separate timecard pay groups for your hourly and salary staff. Then you can setup your timecards in JICS to allow your salary staff to enter their time (regular, sick, vacation, etc.) for an entire pay period while hourly staff enters their hours each day.

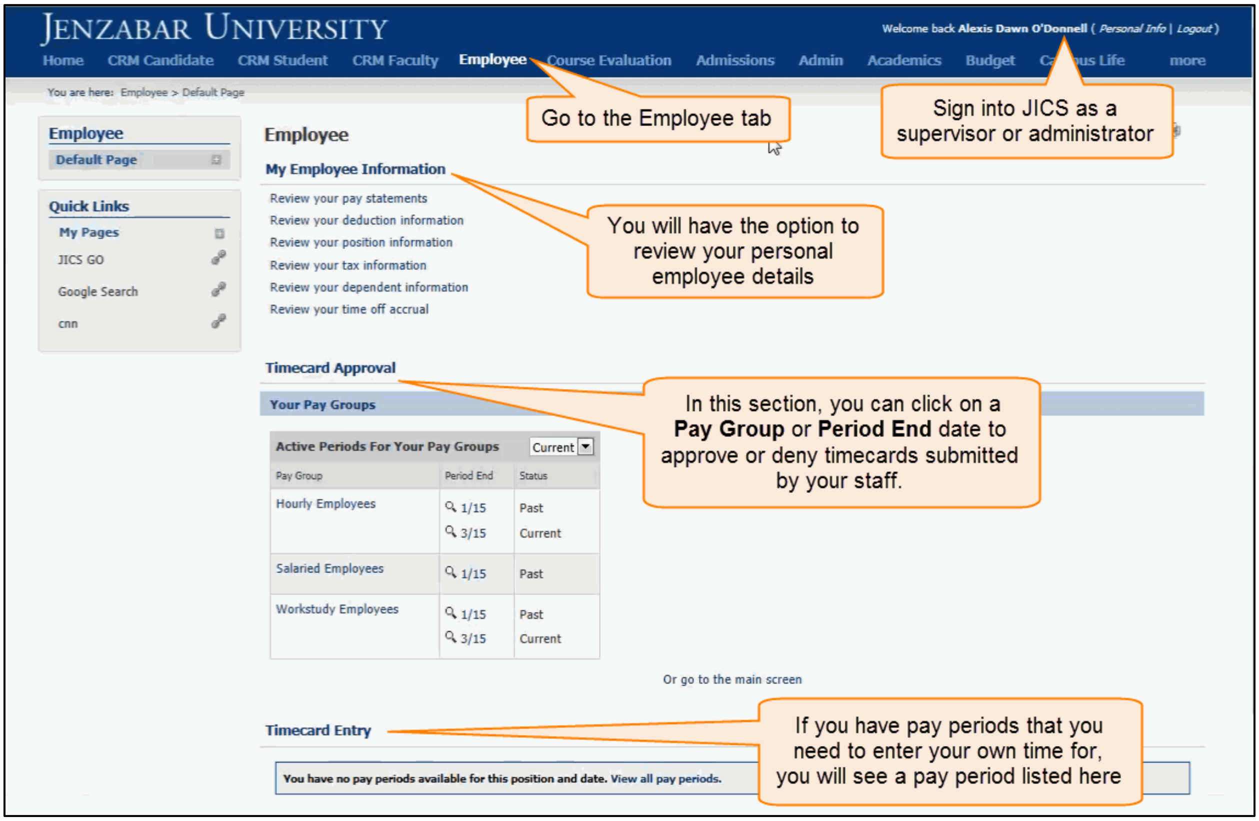
If you are using timecards in CRM Staff you must create the pay period batches in the CRM Staff Timecard Pay Periods window.

Timecard Entry – CRM Staff

When using CRM Staff, your employees will be able to enter their hours through the online portal. You will need to decide how to setup the timecards based on what options you want your employees to have when entering their time.

Administrative View

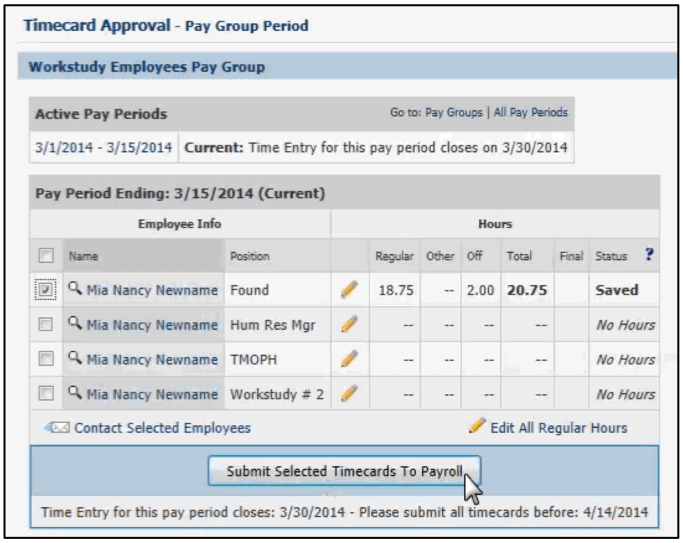
When logged in as an administrator, you will have the option to review your own employee information, setup and approve timecards for your staff, and enter hours into your own timecards.



Timecard Approval

When you click on ***Timecard Approval***, you will see the available timecards you need to review, as well as a list of groups where you are designated as a supervisor. As a supervisor, you have the option to view, edit, and submit timecards for the pay groups listed. In addition to the timecards and pay groups, you will have an ***Admin Options*** link at the top of the window. When you click this link, you will be presented with options that will help you determine how the timecards look and work for your employees.

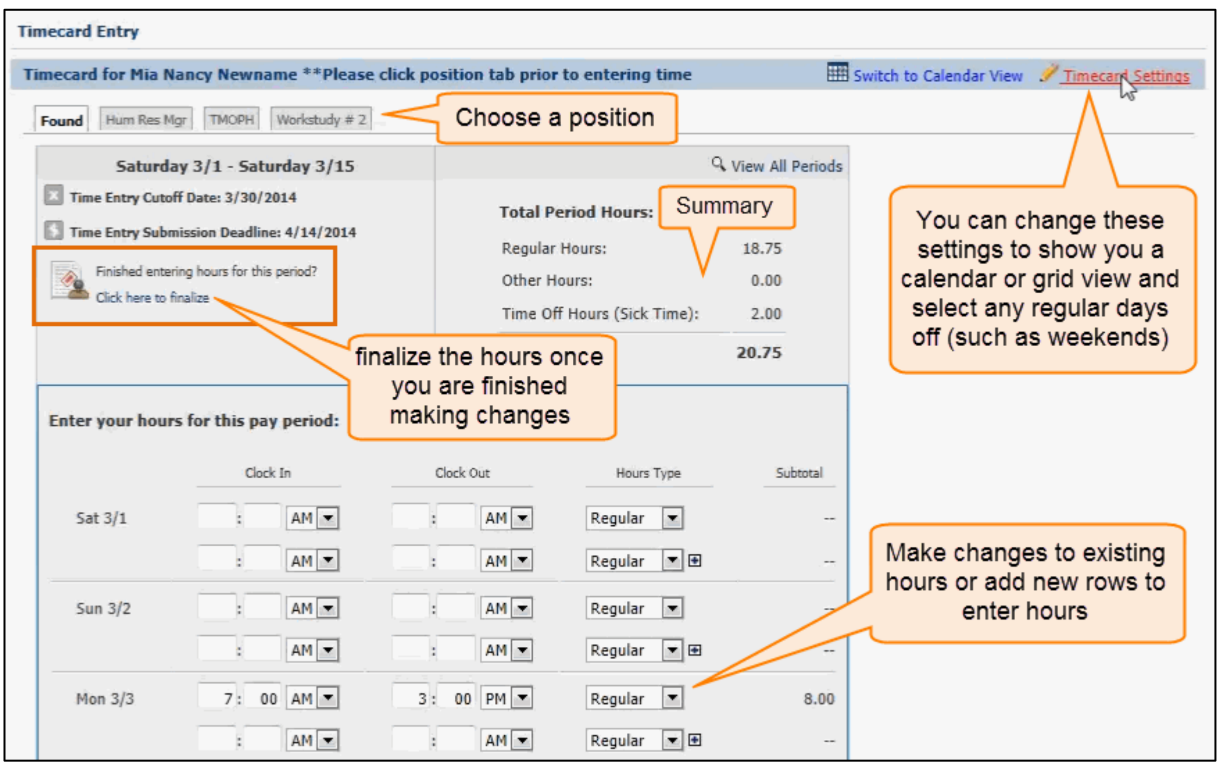
- **Timecard Submission Deadlines:** from this section you will determine deadlines for your employees and managers/supervisors
  - *Time Entry Cutoff Date* – determine how may days an employee has to enter their hours after the end of the pay period
  - *Time Entry Submission Deadline* – determine how many days after the Time Entry Cutoff date the manager/supervisor has to approve and submit the employee’s timecards to Payroll
- **Timecard Entry Rules:** In this section, you will determine if employees can enter hours for future days and times. If you want employees to be able to enter hours beyond the current time, you can check the checkbox.
- **Supervisor and Alternate Approver Assignments:** If you want to change the supervisor or approvers for specific pay groups or managers, you can assign or un-assign them from this section.
- **Rounding of Hours:** this section will allow you to determine if you want to round the hours entered by your employees to the nearest 5, 15, or 30 minute interval and if you want the rounding to always round up, down, or to the closest interval. You can also choose to not round hours.



Once you have setup your Admin Options and your staff enters and finalizes their hours, you can approve their timecards and send them to payroll.

While on the **Timecard Approval** page, you can see a list of your Pay Groups. When you select a Pay Group, you will see a list of people in the group along with their hours. To submit a timecard to payroll, select the checkbox next to the names you want to submit and then click the ***Submit Selected Timecards to Payroll*** button at the bottom of the window.

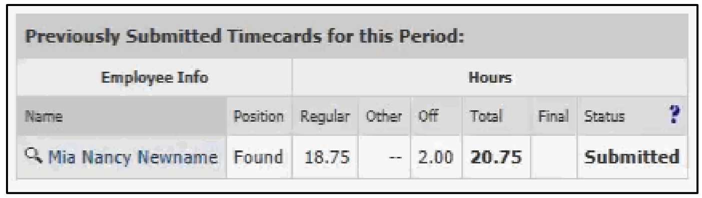
If you need to view/edit an employee's timecard before submitting it to payroll, you can click the name of the individual to open the timecard and view the details. Once on the View Timecard page, you can review the information and if you need to make edits, you can click Edit Hours/Add Comments. From timecard approval, if you know you need to make an edit, you can click on the icon.



Once you have edited the timecard and added any comments, be sure to save your changes at the bottom of the pay period before finalizing the timecard. You are now ready to submit the timecard to the payroll department.

Once a supervisor submits the timecard to payroll, there is no way to un-submit the timecard. Be sure you review your timecards before clicking the Submit Timecard to Payroll button.

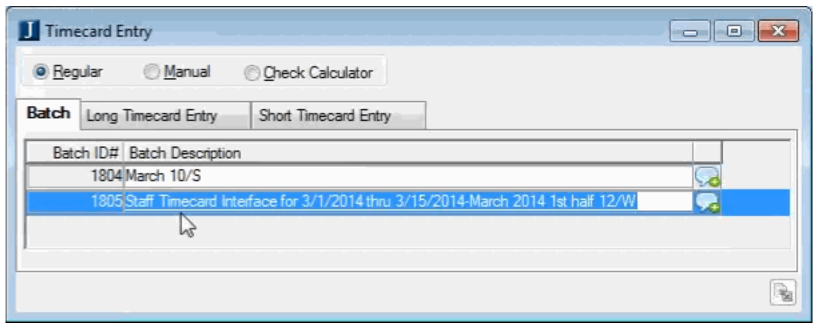
When you submit a timecard, you will see a new section listing the submitted timecards for that pay period.



Previously Submitted Timecards for this Period:

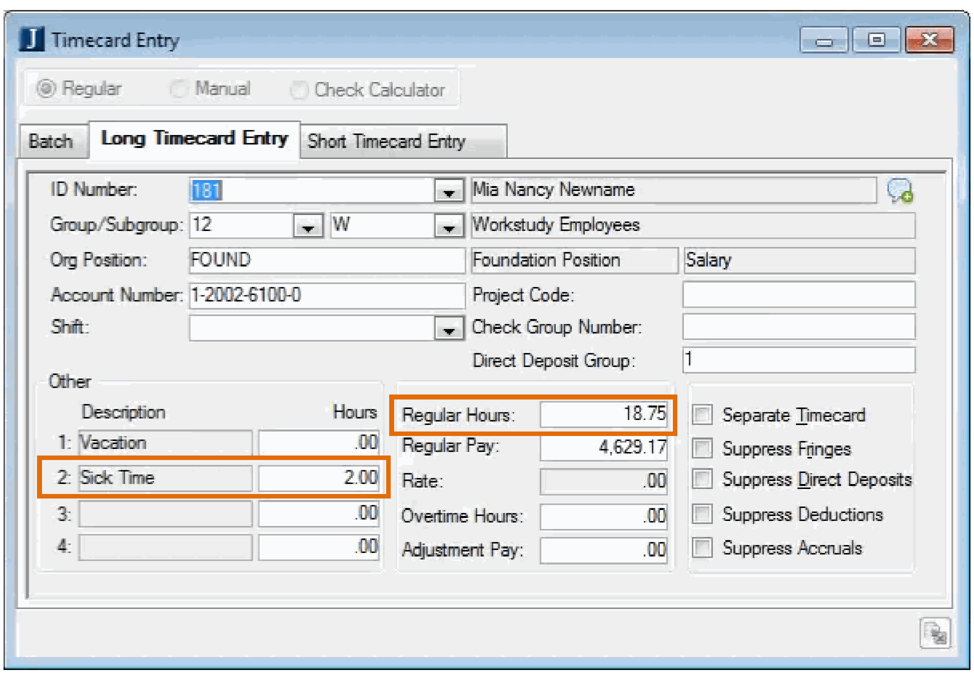
Employee Info		Hours						
Name	Position	Regular	Other	Off	Total	Final	Status	?
Mia Nancy Newname	Found	18.75	--	2.00	20.75		Submitted	

Meanwhile, back in EX on the **Timecard Entry** window, you will see that the system created a batch for the timecard you submitted.



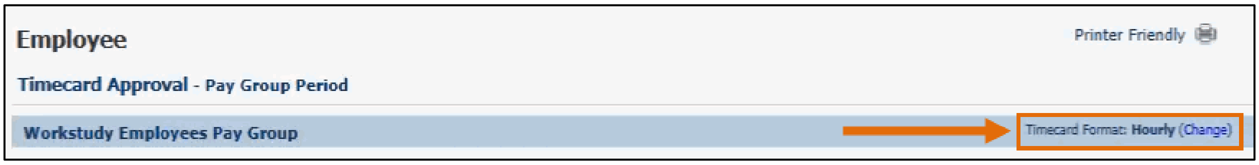
You can tell the difference between the CRM Staff and Manually entered batches by their Batch Descriptions.

If you then look at the **Long Timecard Entry** for the Timecard submitted through JICS, you will see the hours listed for the employee, as they were displayed on the CRM Staff Timecard.

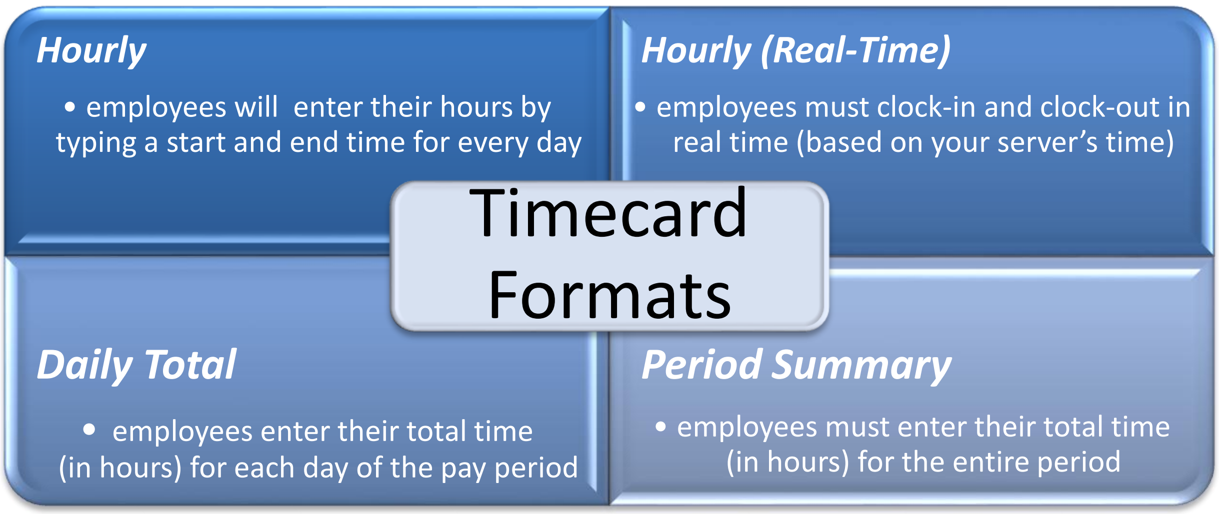


Timecard Entry

You will need to setup your timecards for each Pay Group to determine how you want the timecards to work. Select a Pay Group from the Timecard Approval page and then click the ***Change*** link next to Timecard Format.



You can choose from four timecard formats:



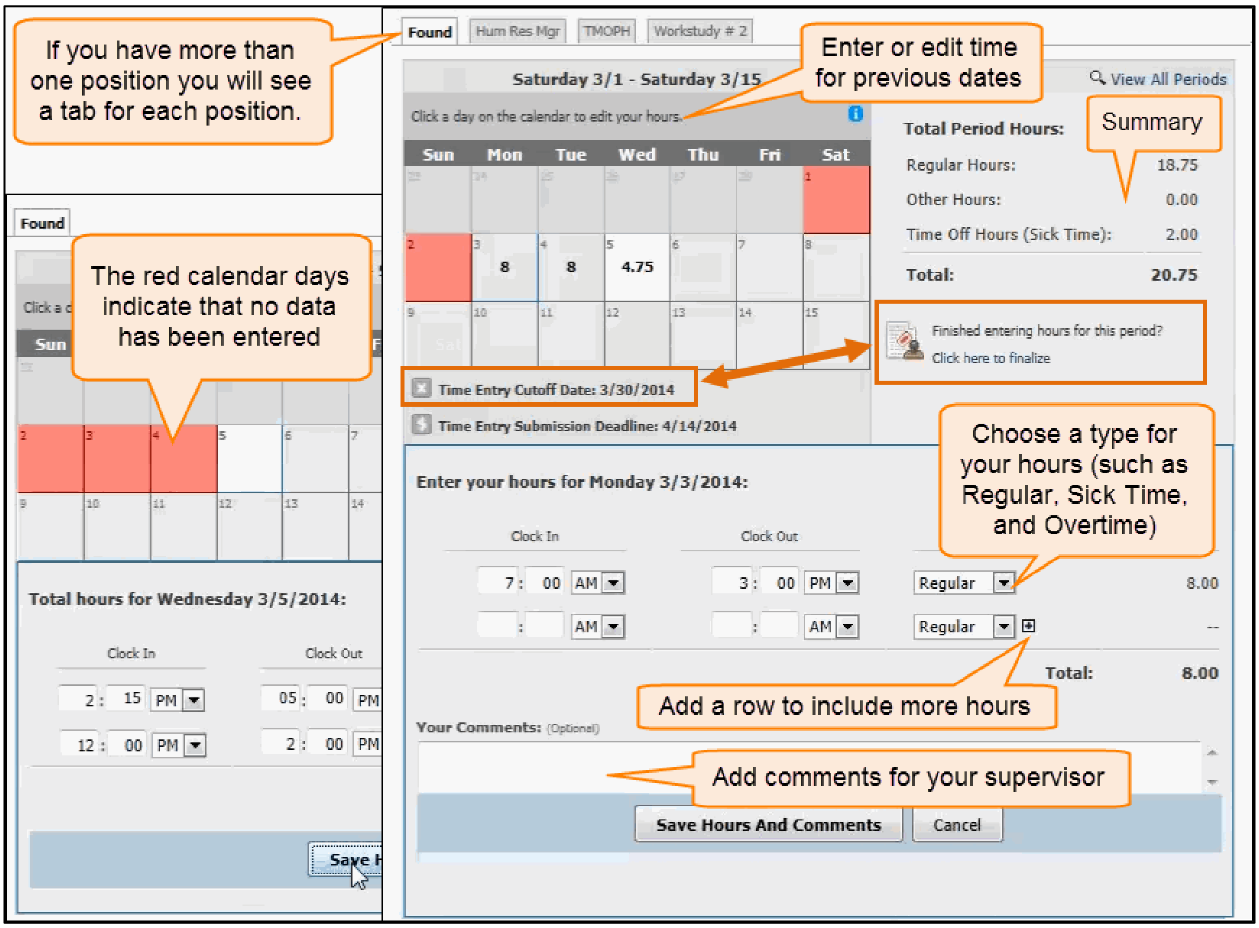
Below are screenshots and details about each of the four timecard formats.

If you want to change all of your timecards, each Pay Group must be changed individually.

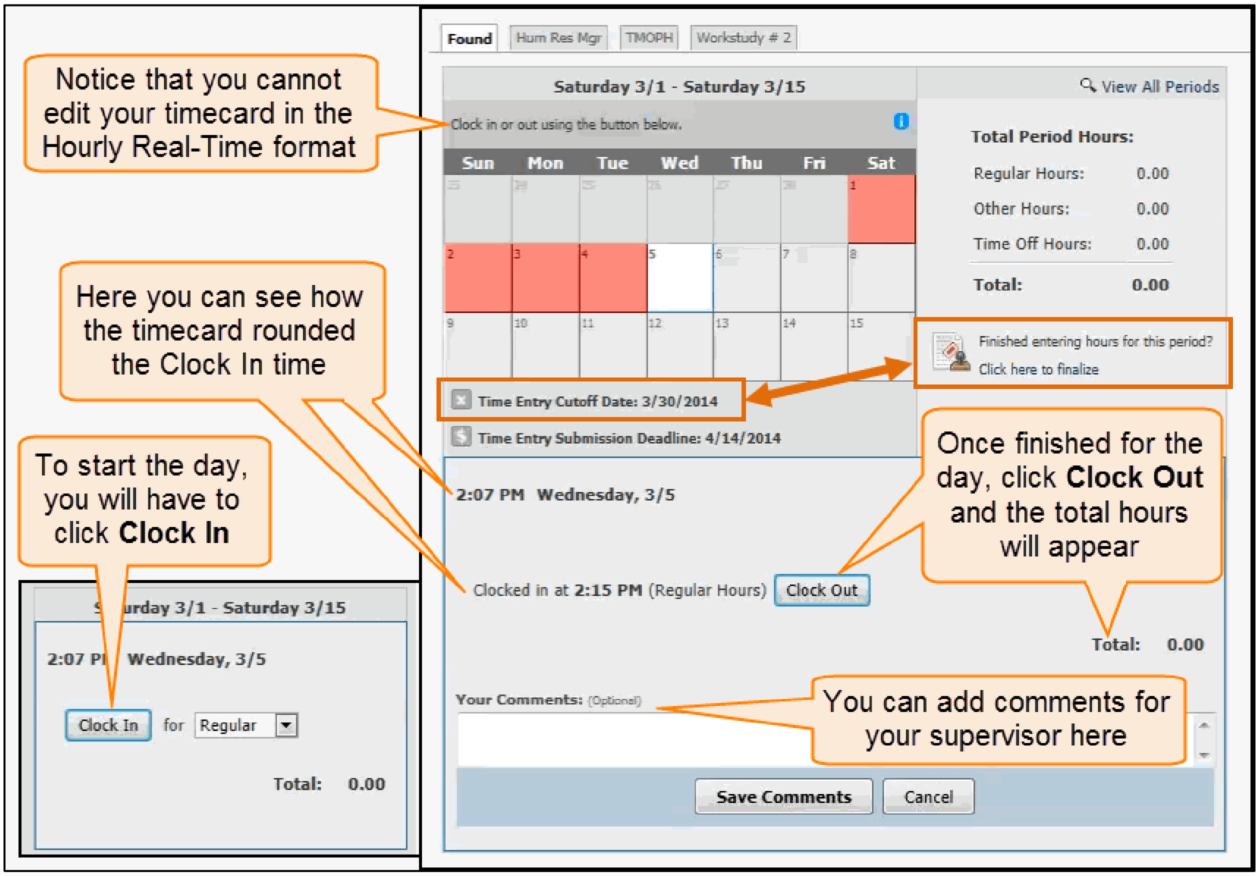
Hourly

In the Hourly timecard format, employees will have to manually enter their daily hours into the clock-in clock-out time slots. Employees with more than one position will need to be careful when entering time, and be sure to select the correct position before saving.

As long as the employee has not finalized their timecard for approval, they can click on a day to edit or enter their hours. Before the ***Time Entry Cutoff Date***, listed below the calendar on the timecard, the employee must ***finalize*** their hours so that their supervisor can approve and send the details to payroll.

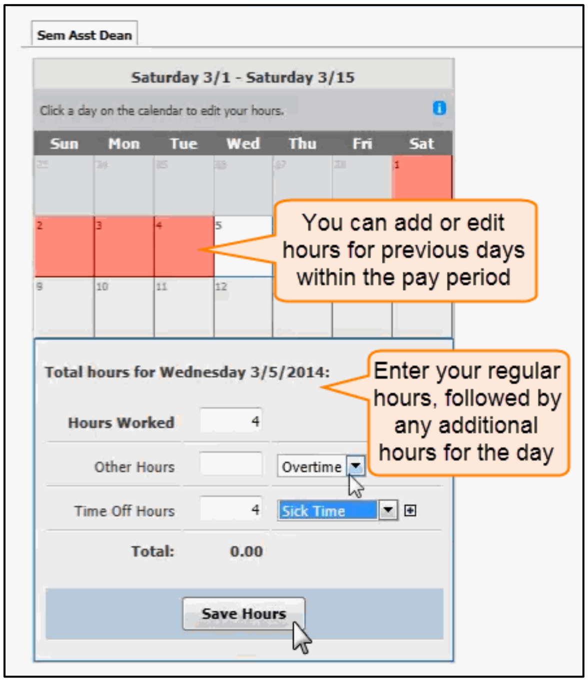


Hourly (Real-Time):
In the Hourly Real-Time timecard format, employees will need to log into JICS to click the ***Clock In*** and ***Clock Out*** buttons. In this format, employees cannot edit hours or add hours to previous dates. If an employee forgot to clock in, it will be the supervisor's responsibility to edit the timecard. This timecard format also does not allow for overtime, sick time, or vacation leave.



Daily Total

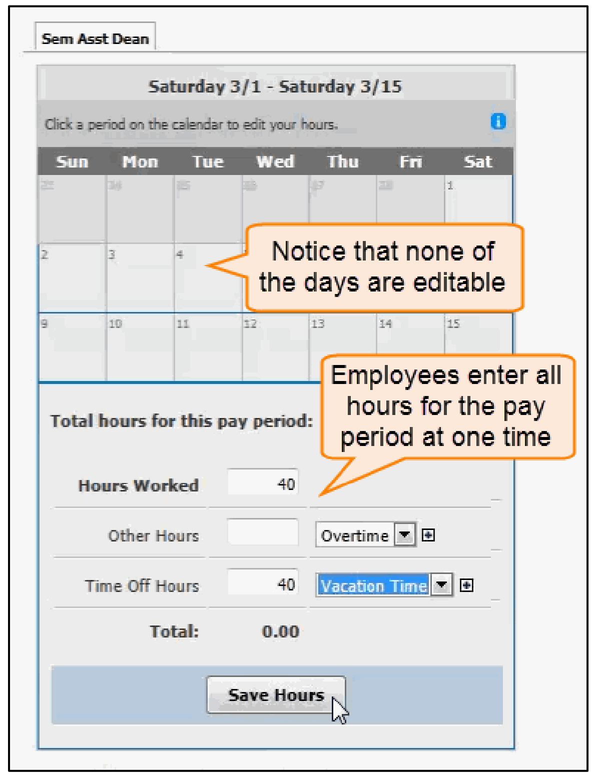
In the Daily Total timecard format, employees will enter the number of hours they spent working for an entire day, rather than entering a start and stop time. They will have the option to include regular, overtime, sick time, and vacation leave for the current or previous days.



The Daily Total option could be a good choice if you have employees that are both salary based and hourly in one Pay Group.

Period Summary

In the Period Summary timecard format, employees will only enter their hours once per pay period instead of daily. Like the Daily Total option, employees can enter hours for regular, overtime, sick time, and vacation leave, but only for the current pay period.



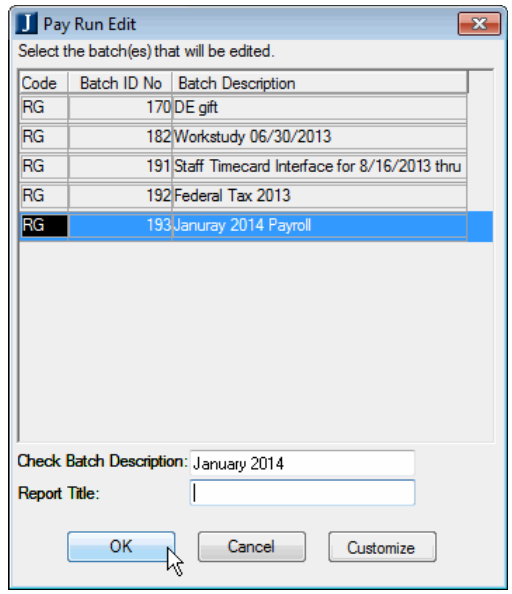
The Period Summary option might be a good choice if your Pay Group is salary based. You could then track sick, vacation, or overtime hours without asking them to enter regular hours on a daily basis.

Step 3: Generate a Check Batch

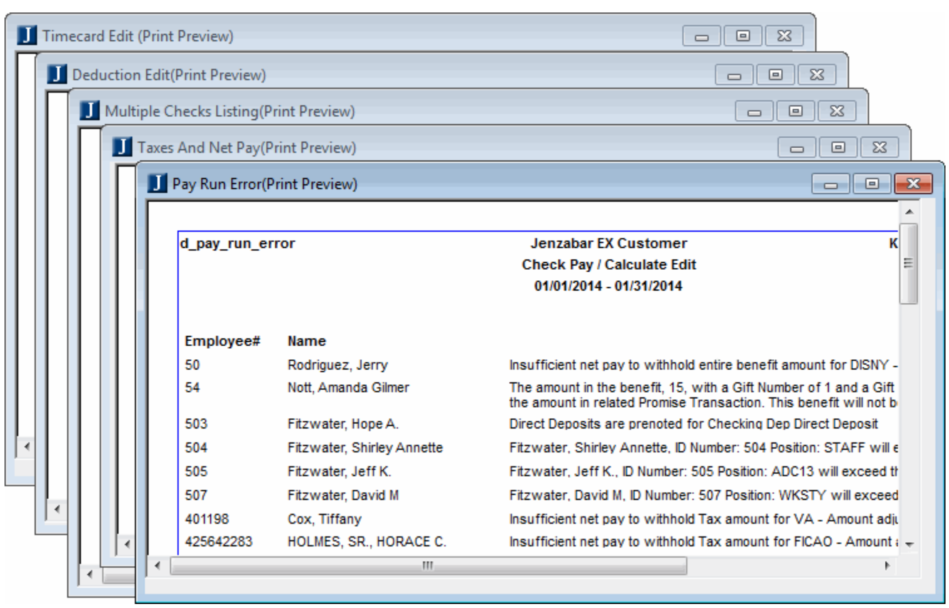
When you have setup your payroll controls and all of your timecards are complete, you will need to review your payroll information and generate a check batch from the **Pay Run Edit** window. Select your batch and create a description, then click ***OK***.

This will run several reports so that you can review details and pay amounts of the pay batch to ensure accuracy.

- **Pay Run Error**: will show any errors or warnings that you need to be aware of before continuing in the payroll run
- **Taxes and Net Pay**: will display tax, deduction, and fringe information for each individual within a group/subgroup
- **Multiple Checks Listing**: will show any employees receiving more than one check for the pay period
- **Deductions Edit**: will list the available deductions and each individual with the amount being deducted
- **Timecard Edit**: will show employee timecard details (similar to the information on the Short Timecard Entry tab)



Separate timecards are calculated independently and then associated with any applicable time entries.



Once you get to this point in the payroll process, if all of you numbers are accurate, you are ready to start cutting checks.

Step 4: Print Paychecks & Transfer Direct Deposits

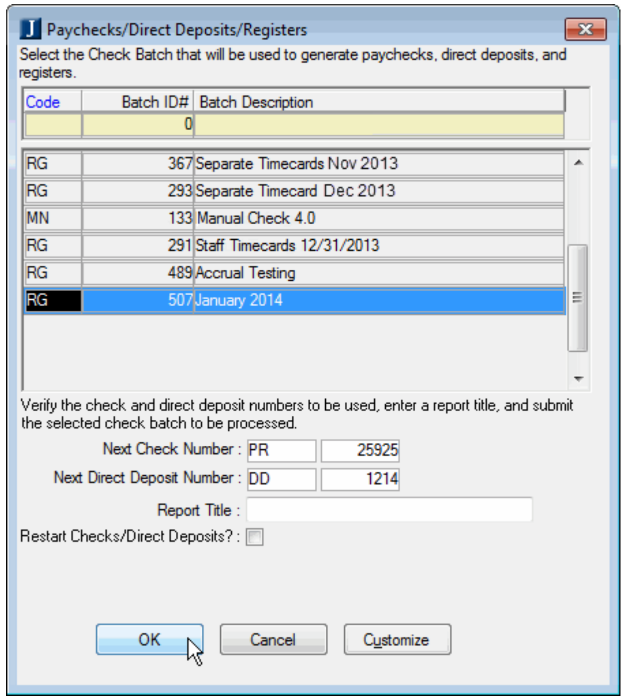
Once you have created your check batches and double-checked for accuracy, you will need to print checks and send the direct deposit information to the appropriate bank accounts.

Create Paychecks/Direct Deposits/Registers

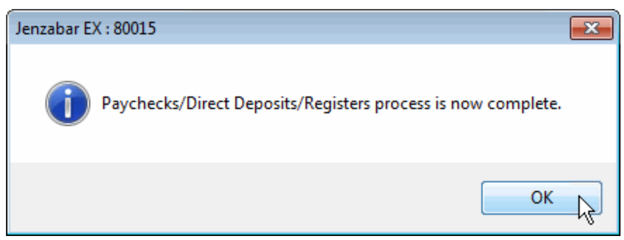
From this window, you can print checks, direct deposit stubs, and a register of the transactions.

Select the batch ID that you would like to print. In most cases, you will not need to change the check and direct deposit numbers, however, if you are in a situation where you want to start at a specific number, you can enter the check and deposit numbers.

The ***Restart Checks/Direct Deposits?*** checkbox is an option that will allow you to rerun the print process. You may need to use this if your printer did not properly print the checks or if you had a paper jam in the middle of your print.



When you click **OK**, you should also see a popup window letting you know that the process was completed sucessfully.

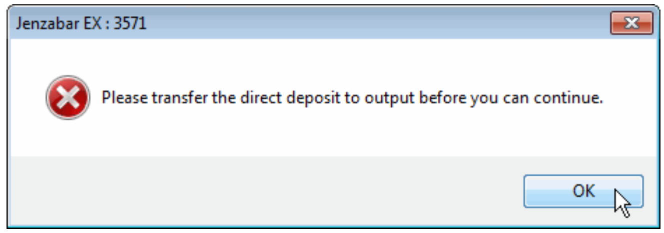


You will see several reports when the process completes:

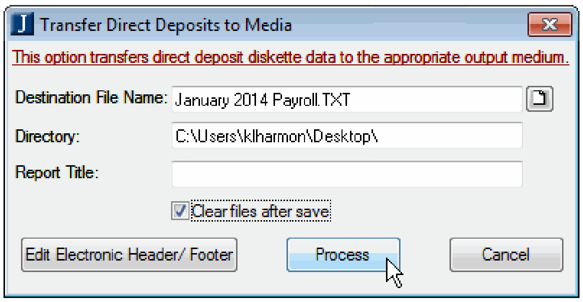
- **Individual Deductions Register**: breaks out deductions by group and then lists each deduction for each individual, and you will also be able to see the check/direct deposit numbers
- **Multiple Checks List**: will show any employees receiving more than one check for the pay period
- **Deduction Register**: will list the available deductions and each individual with the amount being deducted, and you will also see the general ledger account numbers and any project codes
- **Payroll Register**: this register you will get an overview of all information for your employees
- **Pay Check/Direct Deposit**: this report will list all of your checks and direct deposits is broken up into two tabs with printable checks or pay stubs and grand totals

Good record keeping: you should save these reports in a safe place in case of audits.

If you receive the warning message shown on the right, it means that either you did not transfer your direct deposits or you did not clear the direct deposit files after saving them. You will need to go to the **Transfer Direct Deposit to Media** window and clear the saved files.



Transfer Direct Deposit to Media

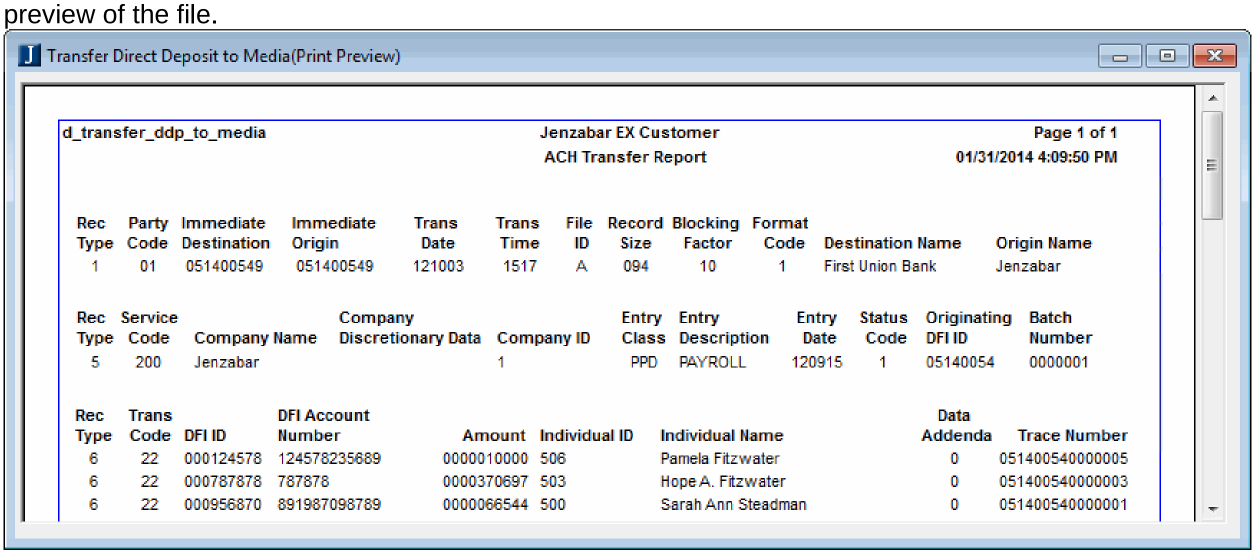


After you complete the Paychecks/Direct Deposits/Registers process, you will need to transfer your direct deposit information to a file. This file is what you will send to the bank so that the money will be transferred to your employee's accounts.

The Clear files after save checkbox will need to be selected to prevent the warning error on the **Paychecks/Direct Deposits/Registers** window. When you click this checkbox, all direct deposit information for the batch will be deleted from the system.

You can save these files somewhere on your computer as a backup in case you need them for your bank records later.

When you click ***Process***, a .TXT file will be saved in the location you chose, and you will see a report preview of the file.


Transfer Direct Deposit to Media(Print Preview)

d_transfer_ddp_to_media — Jenzabar EX Customer — Page 1 of 1

ACH Transfer Report — 01/31/2014 4:09:50 PM

Rec Type	Party Code	Immediate Destination	Immediate Origin	Trans Date	Trans Time	File ID	Record Size	Blocking Factor	Format Code	Destination Name	Origin Name
1	01	051400549	051400549	121003	1517	A	094	10	1	First Union Bank	Jenzabar

Rec Type	Service Code	Company Name	Company Discretionary Data	Company ID	Entry Class	Entry Description	Entry Date	Status Code	Originating DFI ID	Batch Number
5	200	Jenzabar		1	PPD	PAYROLL	120915	1	05140054	0000001

Rec Type	Trans Code	DFI ID	DFI Account Number	Amount	Individual ID	Individual Name	Data Addenda	Trace Number
6	22	000124578	124578235689	0000010000	506	Pamela Fitzwater	0	051400540000005
6	22	000787878	787878	0000370697	503	Hope A. Fitzwater	0	051400540000003
6	22	000956870	891987098789	0000066544	500	Sarah Ann Steadman	0	051400540000001

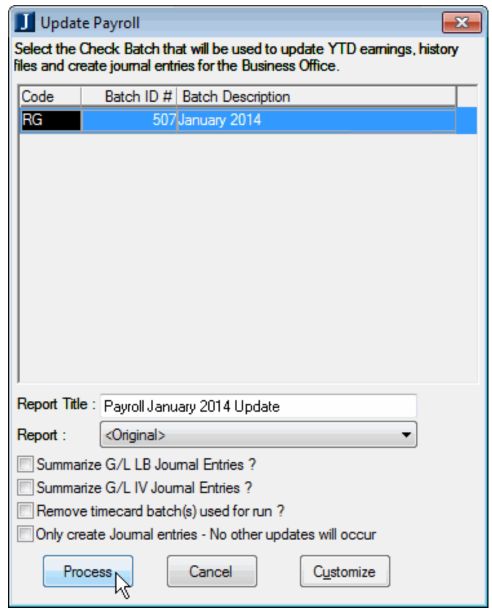
The .TXT file that goes to the bank will not have the formatting and headings that the above report will have. Having a copy of this file can be beneficial to you when you need to lookup specific IDs or account numbers.

Step 5: Update Payroll

Once you have completed steps 1-4, you need to update your payroll in the EX system.

Update Payroll

You will use this window to select a check batch that will be used to update payroll. The check batch is used to update year-to-date earnings, check history amounts, and to create journal entries for the Business Office application. Therefore, this process will send all monetary details to the general ledger and update all accrual information. Before you run Update Payroll, none of the accrual information for employees will update. As a result, the numbers on your general ledger accounts and accrual calculations will be incorrect.



When the process successfully completes, you will receive a report with all of your employees and payroll information itemized (or summarized if you chose the summarize option on the **Update Payroll** window).

During the Update Payroll process, the Check Date on the batch is used to determine the month, quarter, and year to which the amounts are added.

You must run the Update Payroll process to complete the payroll processing. If you do not run Update Payroll, you will have major issues with your employee accruals, year-to-date totals, and general ledger accounts.

As a part of the update process, the pay run controls are automatically updated with the next available check and direct deposit numbers.

Errors

- If your system is integrated with the Development module, the payroll cannot be updated until Development has pulled in the gifting from the previous payroll run.
- If there are any errors in found in your payroll, you must fix them before the update process can be completed.

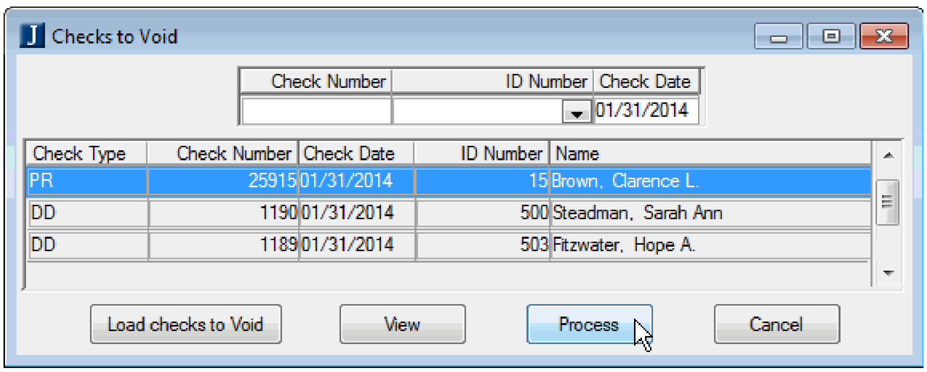
If the update process finds errors, you will see an error report that will help you locate the issues that need to be fixed.

Step 6: Void Checks

On occasion, there may be an error in the payroll process or your employees may misplace/damage their initial paycheck and you will need to void their check.

Checks to Void

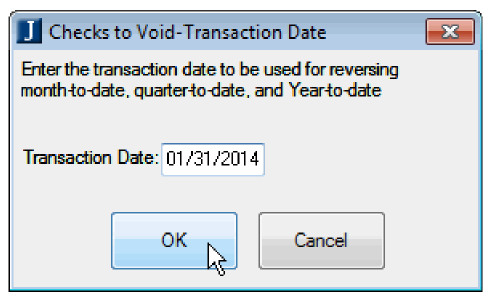
From the **Checks to Void** window, you will select the check or checks you need to void. You can search for checks by the check number, employee ID number, or the check date. Once you have selected the checks you wish to void, click the ***Process*** button.



You will need to enter a transaction date that will identify when the check was voided. Usually you will use the original check date; however, you may want to use the current date if you will be creating an adjusting report.

Click ***OK*** to void the check(s).

When you void a check, you will see all of your register reports with the negative amounts from the check(s) you voided.



You will also need to go back to the **Update Payroll** and run the process again to send the information back to the general ledger and update your year-to-date totals. Your original check would have been in a batch with a source code of RG, and the new check will be generated in a batch with a VD source code.

If you accidentally voided a check but did not update payroll, go to the Unused Check Batches window and remove the batch before updating to cancel the void.

Chapter 6. Using Applicant Tracking

In this chapter, you will follow the process of tracking potential employees through the application process using the CRM Staff portlet.

Objectives

At the end of this chapter, you will be able to:

- Setup CRM Staff for Applicant Tracking
- Request a position
- Review position requests
- Use Formbuilder to create an application
- Process applicants
- Hire a new employee

Applicant Tracking Process Overview

Applicant Tracking will take place internally and externally. Most of the process will be done internally; from requesting and positing a position to creating application forms and reviewing applicants. However, after posting a position, people (internal and external) can view and apply for the position.

STEP 1: COMPLETE SETUP AND MAINTENANCE

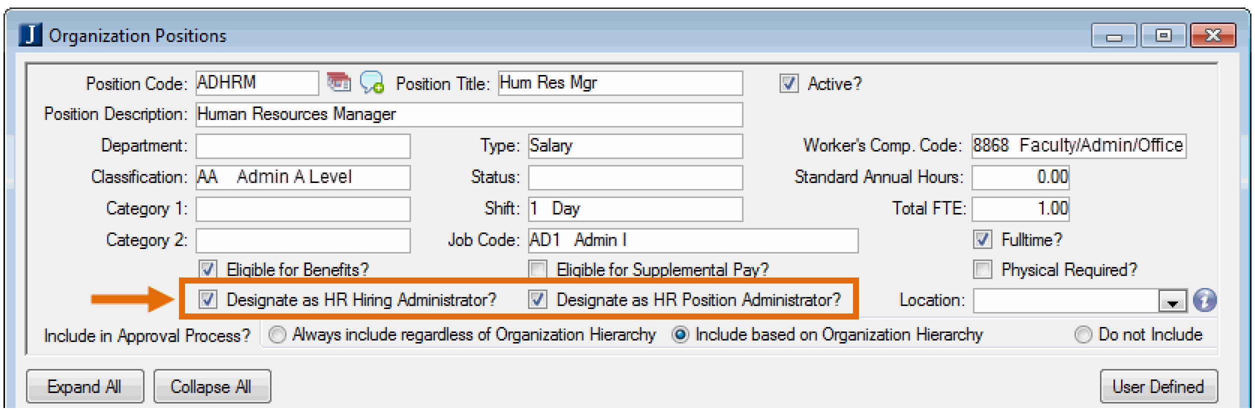
When using Applicant Tracking, there are several setup steps you need to complete before beginning the process. The windows and steps below will get you started.

Working in EX

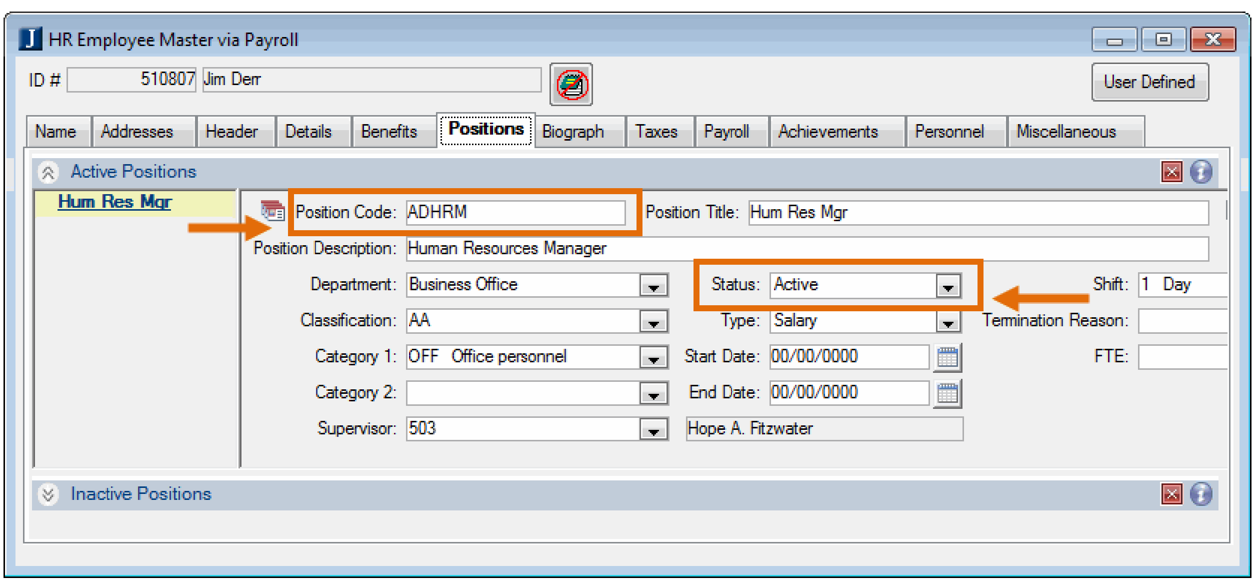
EX and JICS work together to make Applicant Tracking possible. To complete the process, you will need to work in the following EX windows.

Creating an HR Administrator

Set up a position that is an HR Administrator. Go to the **Organization Positions** window and make sure that at least one position is designated as an *HR Hiring Administrator*. This typically will be only one position. This setting will assign employees in the position to the appropriate roles of the Position Request by default.

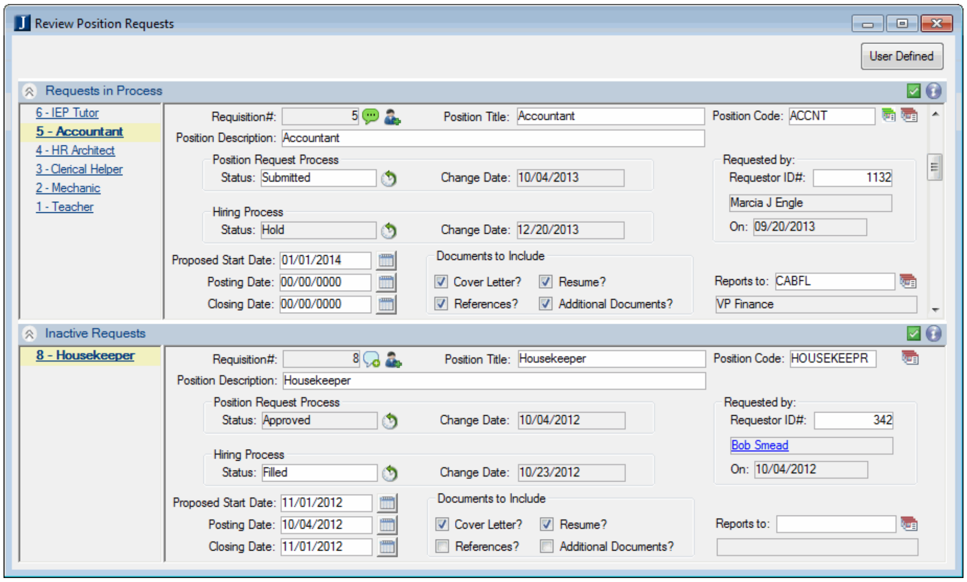


In addition to ensuring that a position is designated as an HR Hiring/Position Administrator you need to make sure there is an employee assigned to this position and the employee's position is active:



Reviewing Position Requests

When you begin the process of hiring a new employee, you will first need to have an open position. You may start with an existing position or you may need to create a new position. You will need to review the **Organization Positions** window to ensure that the position you want exists in the system. In addition to looking at the existing positions, current employees can submit a request for new positions. When an existing employee requests a new position, use the **Review Position Requests** window.

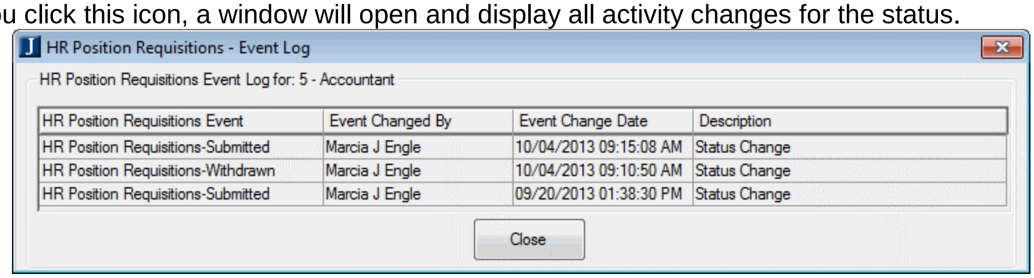


There are several icons on the window of which you should be aware:

	Click the icon to add a comment or attach a file.
	This icon indicates that there is one or more comments attached to the position. You can click the icon to view existing comments or respond to a comment.
	Selecting this icon will open the **Manage Hiring Officers** window, and allow you to assign a Hiring Manager to the position.
	Click this icon to attach the requisition to an existing organization position from the **Select Position Code** window.
	You would click this icon to open the **Organization Positions** window and create a new position for the requisition.

The system will automatically create a requisition number for each position request submitted *(not to be confused with purchasing requisition numbers)*. Once a request is submitted, you will be able to approve or deny the request as needed from the Status drop-down box (see Position Request Process Statuses).

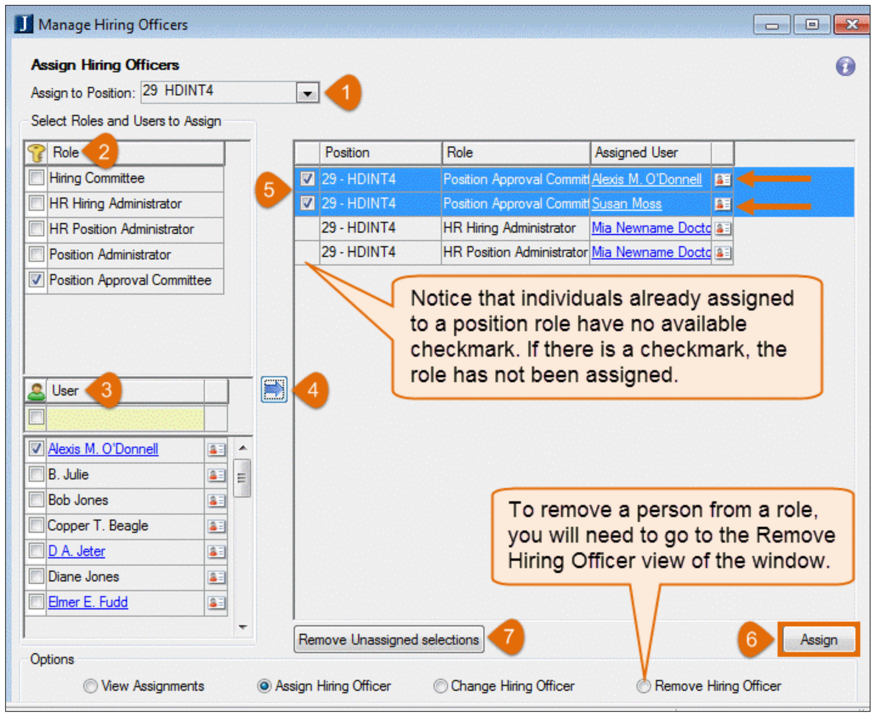
On the **Review Position Requests** window, you will see an Event Log icon  next to the status fields. When you click this icon, a window will open and display all activity changes for the status.



Managing Hiring Officers

From this window, you will assign, review, update, and remove hiring officers from positions and roles. Each hiring officer role can have multiple users assigned to them, and an individual can belong to multiple roles, but the roles must be assigned to each position individually. Each position also must be assigned at least one hiring officer.

1. Select a position
2. Choose which role you want to assign
3. Select users for the position
4. Click the icon to move users into the role
5. Select the checkboxes of the users you want to assign
6. Click the ***Assign*** button
7. If you did not want to assign an individual you moved over click the ***Remove Unassigned selections***



The illustration below provides a visual representation of the tasks that might be performed by each role maintained on the **Hiring Officers** window:

HR Hiring Administrator

Prepares, posts, and closes requested positions

Assigns Hiring Committee members

Reviews initial applications

Approves interviews and removes applicants from consideration

Offers a position to an applicant

Handles acceptance and rejection letters

Ends the position hiring process

HR Position Administrator

Requests, reviews, and withdraws requested positions

Approves or denies a newly requested position

Assigns hiring officers to the Position Approval and Hiring Committees

Offers a position to an applicant

Ends the position hiring process

(this role will usually be held by a Human Resources employee)

Position Administrator

Requests, reviews, and withdraws requested positions

Approves or denies a newly requested position

Assigns individuals to the Position Approval Committee

Handles rejected offers from applicants

Removes applicants from consideration

Position Approval Committee

Reviews positions

Approves or denies submitted position requests

Hiring Committee

Assists in the evaluation of the applicants

Approves or denies applicants for consideration

(this role can be comprised of people across campus or within a specific department)

Position Request Process Statuses

The Hiring officers will play different roles in the position request and hiring processes. Depending upon the role, hiring officers can submit or approve position requests, participate in the hiring process for a specific position, and receive notifications about the current status of the process. To better understand the statuses involved with the Position Request Process, see the table below:

	Submitted	Accepted	In Progress	Approved	Withdrawn
Who?	Users with the authority to submit position requests and access to JICS and/or the EX window (ex. HR Position Admin or Position Admin)	HR Position Admin and/or Position Admin	HR Position Admin	HR Position Admin and/or Position Admin	HR Position Admin and/or Position Admin
How?	Using the **Employment Position Management, *Request New Position*** link, or the EX ***Review Position Requests*** window a position request is submitted	Using the EX **Review Position Requests** window, someone from HR (or with the proper authority) reviews and accepts the position request (Committee members can be assigned using the EX **Manage Hiring Officers** window)	HR (or with the proper authority) has assigned a Position Approval Committee and possibly a Hiring Committee so now the position request can be reviewed by the Position Approval Committee and the status can be updated using the EX **Review Position Requests** window	Using the EX **Review Position Requests** window	Using the EX **Review Position Requests** window
Outcome?	The position request can be seen in **Employment Position Management** by the HR Position Admin or Position Admin	The position request is accepted and the position can be seen in **Employment Position Management** by the HR Position Admin, Position Admin, and the Position Approval Committee	The position request is being processed and can be seen in **Employment Position Management** by the HR Position Admin, Position Admin, Position Approval Committee (committee events commence), and may also be viewed by the individual requesting the position under **View you recent position requests?**	Position request is approved or denied and can be seen in **Employment Position Management** by the HR Hiring Admin and Position Admin but is no longer available to the HR Position Admin or Position Approval Committee; the position will not be available to the Hiring Committee until applications are submitted (if approved) and the Position Hiring Events begin	The position request is withdrawn and can be seen in **Employment Position Management** by the HR Position Admin and Position Admin but is no longer available to the Position Approval Committee
Notified?	HR Position Admin and/or Position Admin	None	Position Approval Committee	HR Position Admin, Position Admin, and/or Position Approval Committee	HR Position Admin, Position Admin, and/or Position Approval Committee
Why?	Notified to allow HR to review the request before releasing it for review by others (this is a time saver if there is a hiring freeze)	No one would be notified so that HR would have time to setup assignments (if needed)	The committee would be notified to allow the administrators to see the position request (no one from the hiring perspective would be involved at this point since the position has not yet been approved	This is not an automatic process since even if each committee member approves the position, it still may need to be approved or denied by an admin	This is not an automatic process

Working in JICS

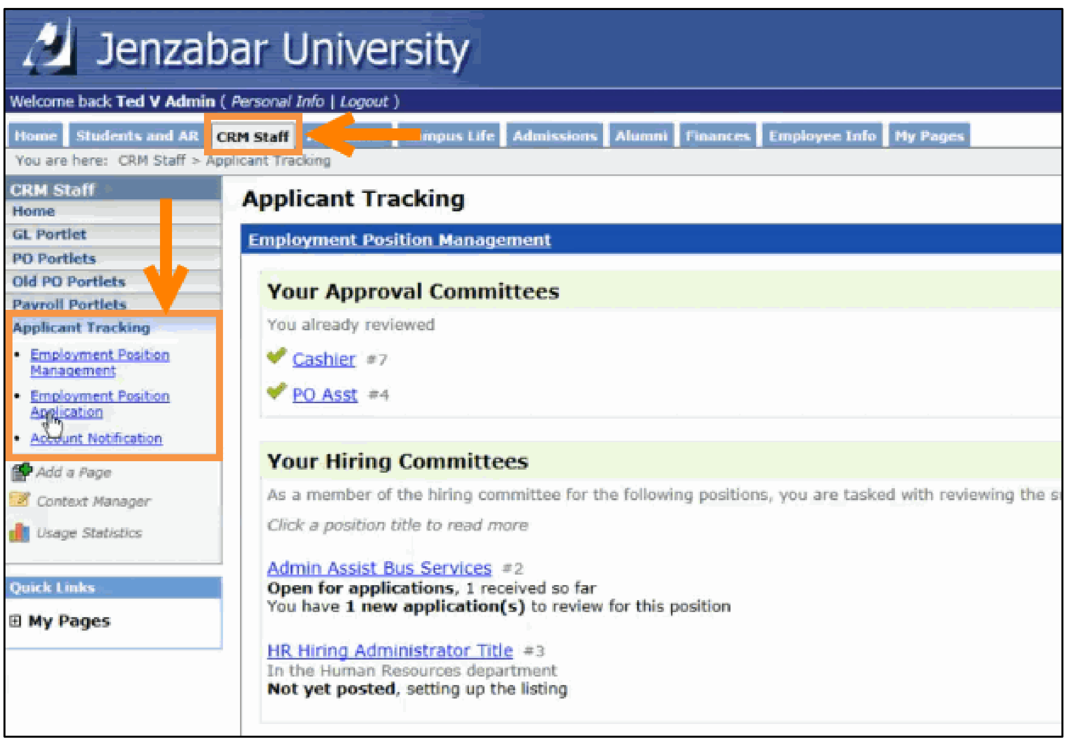
EX and JICS work together to make Applicant Tracking possible. To complete the process, you will need to work in the following windows of the JICS portal.

CRM Staff

Within the JICS product, you can use the CRM Staff portlet to follow and work with Applicant Tracking. Once logged into your JICS website, you will need to move to your CRM Staff portlet and find the Applicant Tracking.

There are three portlets within Applicant Tracking:

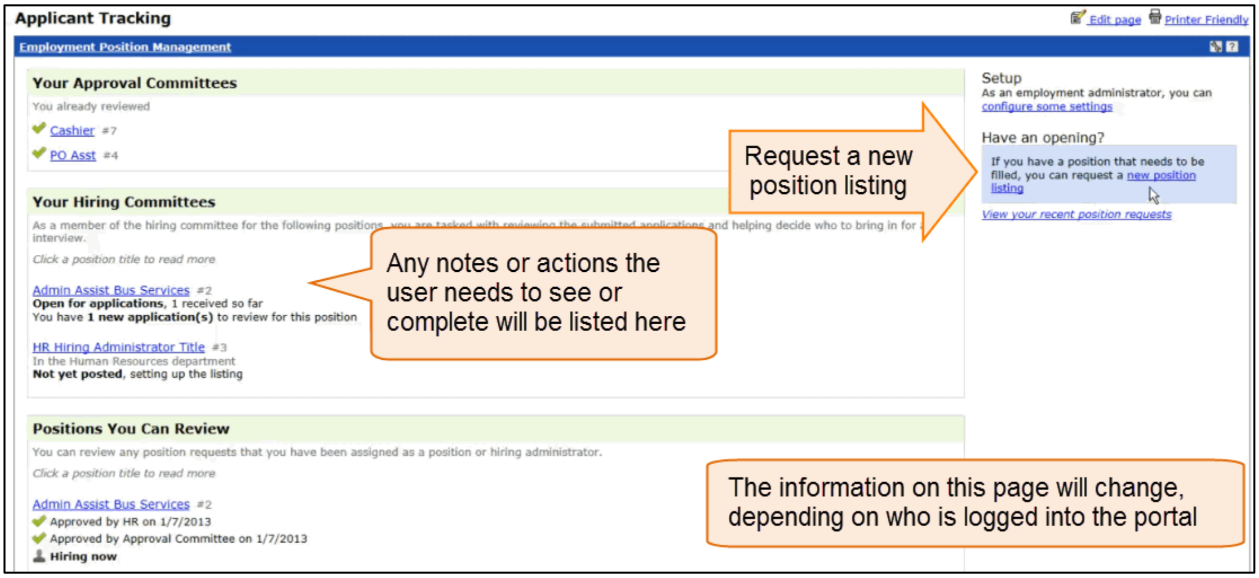
- **Employment Position Management** – this internal page is where your current employees can go to request a new position
- **Employment Position Application** – this public page is where internal and external individuals will go to apply for an open position
- **Account Notification** – this administrative page is where your school will setup how notifications are sent



Your screens will not look the same as the images in this document. The setup of your website and portals will vary depending on the site design for your school and your permissions. In addition, the name and location of your portals/pages will vary.

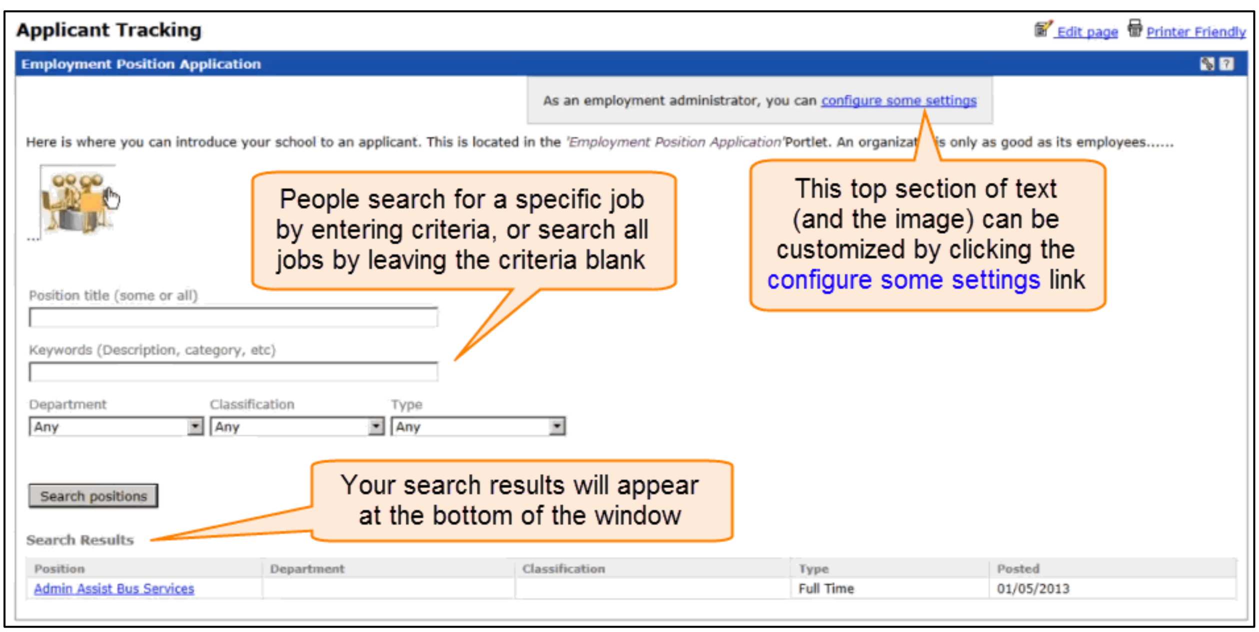
Employment Position Management

The Employment Position Management portal is where an employee can request a new position listing, view their membership in the Approval and Hiring Committees, and review positions assigned to them.

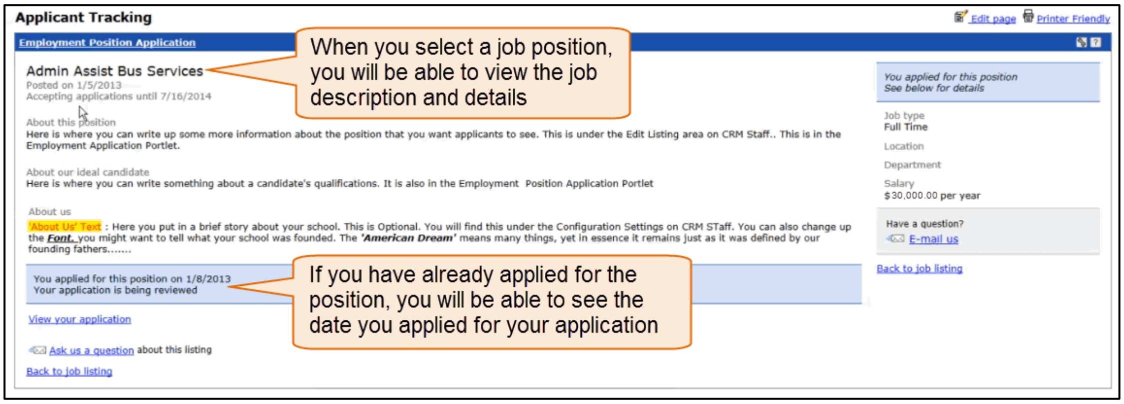


Employment Position Application

The Employment Position Application portal is where your potential applicants can search all available positions at your school, review their applications, and submit questions about a specific position.



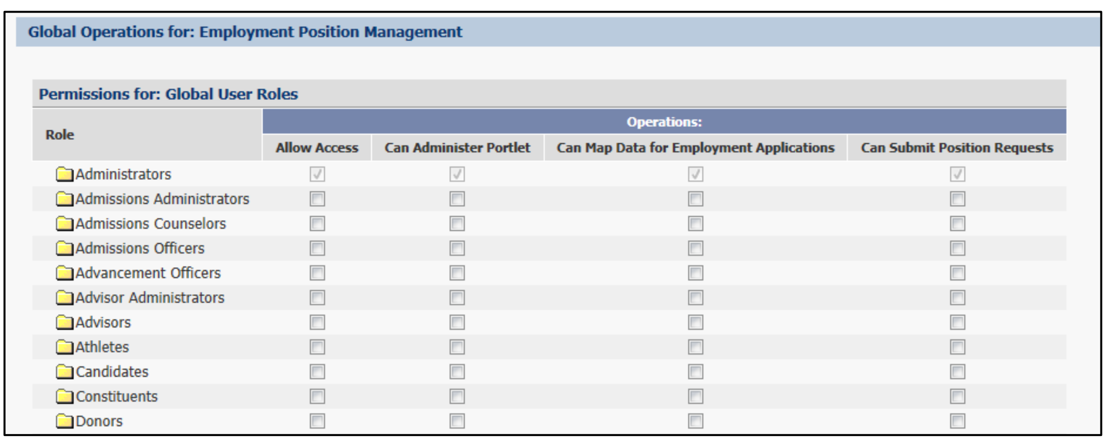
You can select any of the positions in the Search Results for more information about the job listing.



Role Permissions

You will need to setup role permissions for the portlets and add them to an existing page or create a new tab.

1. Log into JICS as an administrator
2. Go to Site Manager → Global Portlet Operations
3. Scroll down to the ***Employment Position Management*** link and click on it
4. The **Global Operations** window will appear



Global Operations for: Employment Position Management

Permissions for: Global User Roles

Role	Allow Access	Can Administer Portlet	Can Map Data for Employment Applications	Can Submit Position Requests
Administrators	☑	☑	☑	☑
Admissions Administrators	☐	☐	☐	☐
Admissions Counselors	☐	☐	☐	☐
Admissions Officers	☐	☐	☐	☐
Advancement Officers	☐	☐	☐	☐
Advisor Administrators	☐	☐	☐	☐
Advisors	☐	☐	☐	☐
Athletes	☐	☐	☐	☐
Candidates	☐	☐	☐	☐
Constituents	☐	☐	☐	☐
Donors	☐	☐	☐	☐

- ***Allow Access:*** when selected, individuals with this permission will be able to see the page
- ***Can Administer Portlet:*** this option gives individuals administrative rights to the page
- ***Can Map Data for Employment Management Application:*** this option will give individuals permission to create and map information for application forms in Formbuilder
- ***Can Submit Position Requests:*** if selected, this checkbox will give individuals permission request a position from the Employment Position Management page

Permissions for: Global User Roles

Role	Operations: Allow Access	Operations: Can Admin Global Settings
Administrators	☑	☑
Admissions Administrators	☐	☐
Admissions Counselors	☐	☐
Admissions Officers	☐	☐
Advancement Officers	☐	☐
Advisor Administrators	☐	☐
Advisors	☐	☐
Athletes	☐	☐
Candidates	☐	☐
Constituents	☐	☐
Donors	☐	☐
Employment Applicant	☐	☐
Everyone	☑	☐
External Authentication	☐	☐
Faculty	☐	☐
Financial Aid Administrators	☐	☐
Guests	☑	☐
Parent	☐	☐
Parents	☐	☐
Staff	☑	☐
Staff Administrators	☑	☑
Student	☐	☐
Student Administrators	☐	☐
Students	☐	☐
Teacher Assistant	☐	☐
Users	☑	☐

5 Select the proper operations for each role and save

6 Do the same for the ***Employment Position Application*** portlet

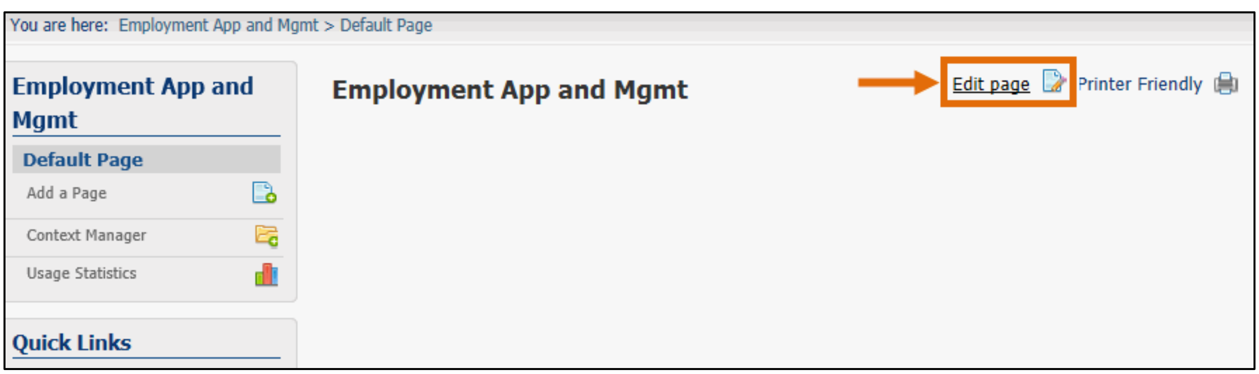
You may want to hold off making this portlet available to Everyone or Guests until you are up and running; however, you will want to make it available to the Staff Admin Role so you can run tests.

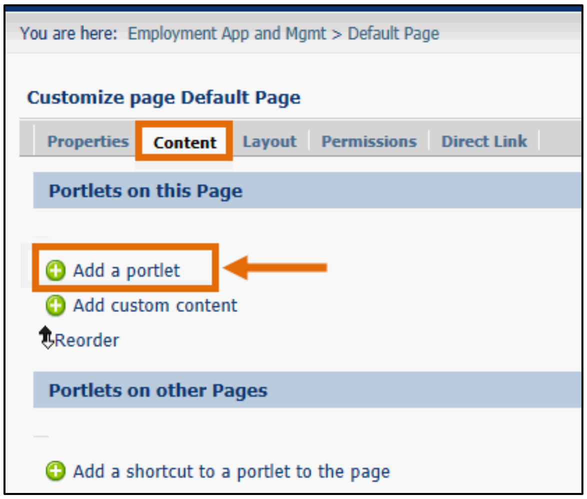
The permissions on the left have configured who will be able to access the portlets and what they can do in each portlet.

Creating Pages for Applicant Tracking

Once you have the correct permissions, you can build pages by adding portlets. If you want the Applicant Tracking to be visible, you will need to add the Employment Position Management and Employment Position Application portlets to the page.

1 Go to the empty page and click on ***Edit Page***





2 Click the ***Content*** tab and ***Add a portlet***

3 Scroll down to ***Pages for Staff*** if that is a role you gave access to the portlets

4 Click on each one to add it to the page

5 Exit and the log out of Administrator

Notifications

The notification features will provide updates about where in the process a specific position may be and send the details to individuals signed up to receive the notifications.

All notifications must be sent from EX (Notepad) there is currently no process in JICS.

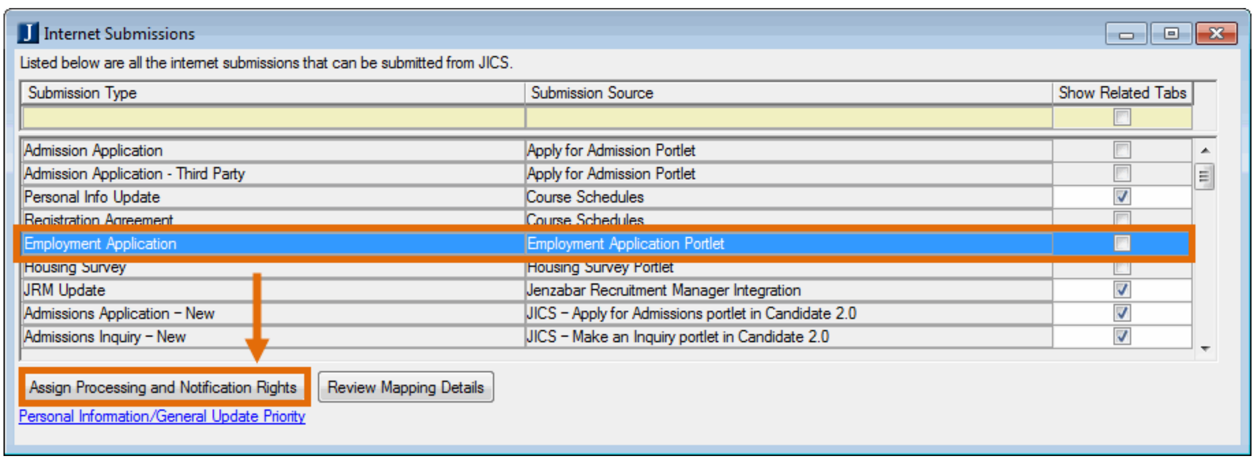
EX Notifications

To setup notifications you will need to look at two places in EX: Internet Submissions and HR Configure Human Resources via Payroll/Personnel.

Internet Submissions

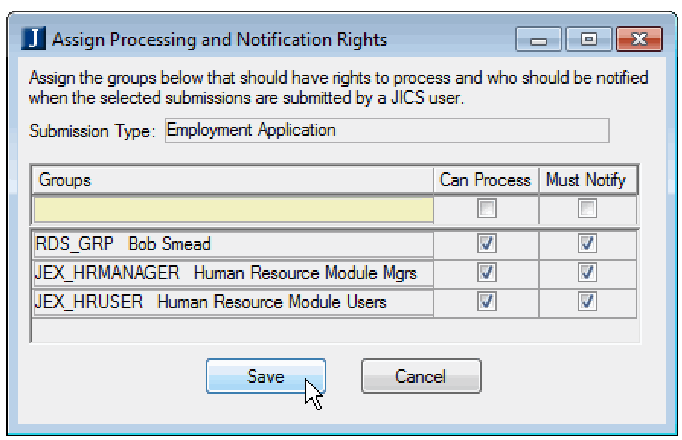
1 Scroll down the **Internet Submissions** window until you find *Employment Application*

2 Highlight the row and click on ***Assign Processing Notification Rights***



3 On the **Assign Processing and Notifications Rights** window, right-click to add or delete rows as needed

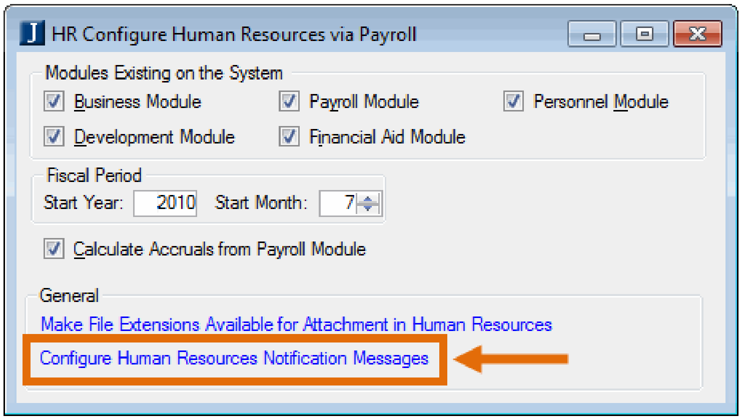
4 Select the checkboxes to assign processing rights and notifications for each group



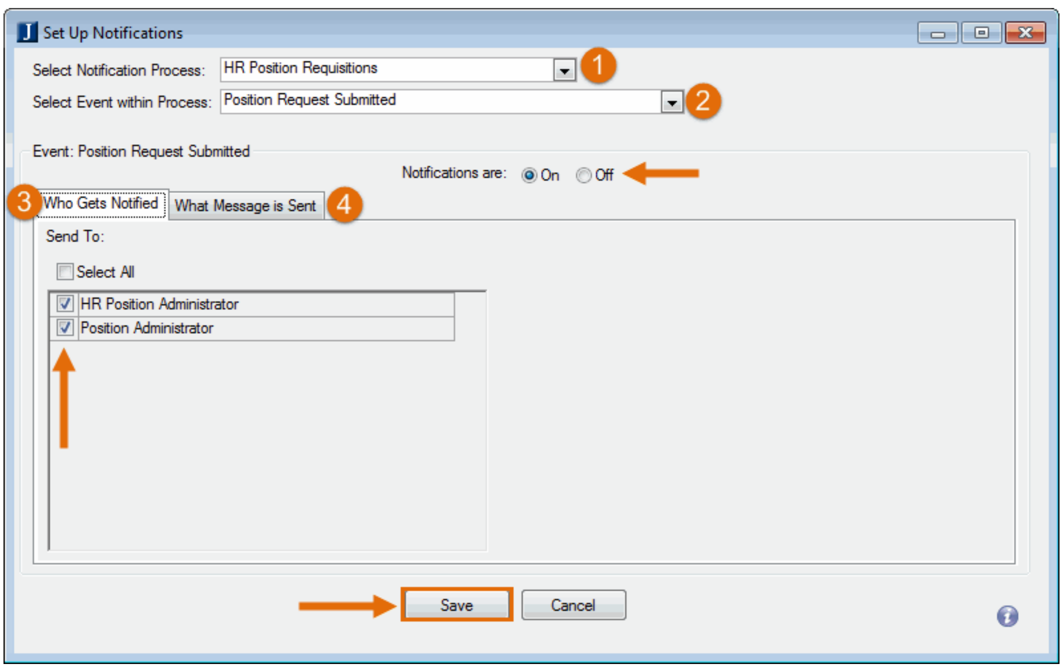
The users in the above groups will receive a notification when someone submits an application. The user would then process that application via the Process Internet Submissions window.

HR Configure Human Resources

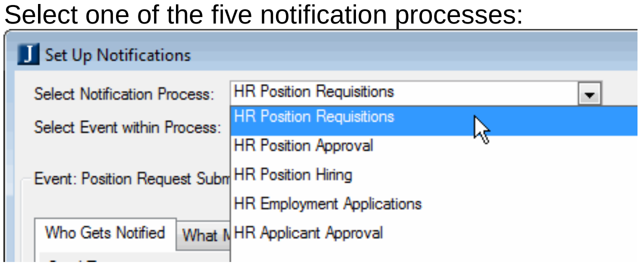
1 Click on ***Configure Human Resources Notification Messages***



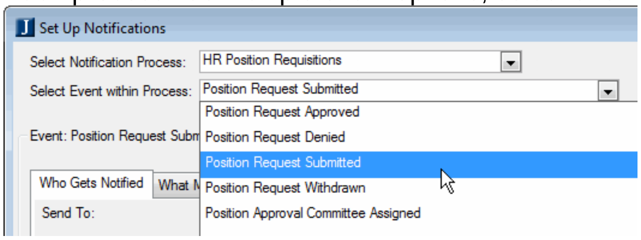
2 There are many options available from the **Set Up Notifications** window



1 Select one of the five notification processes:

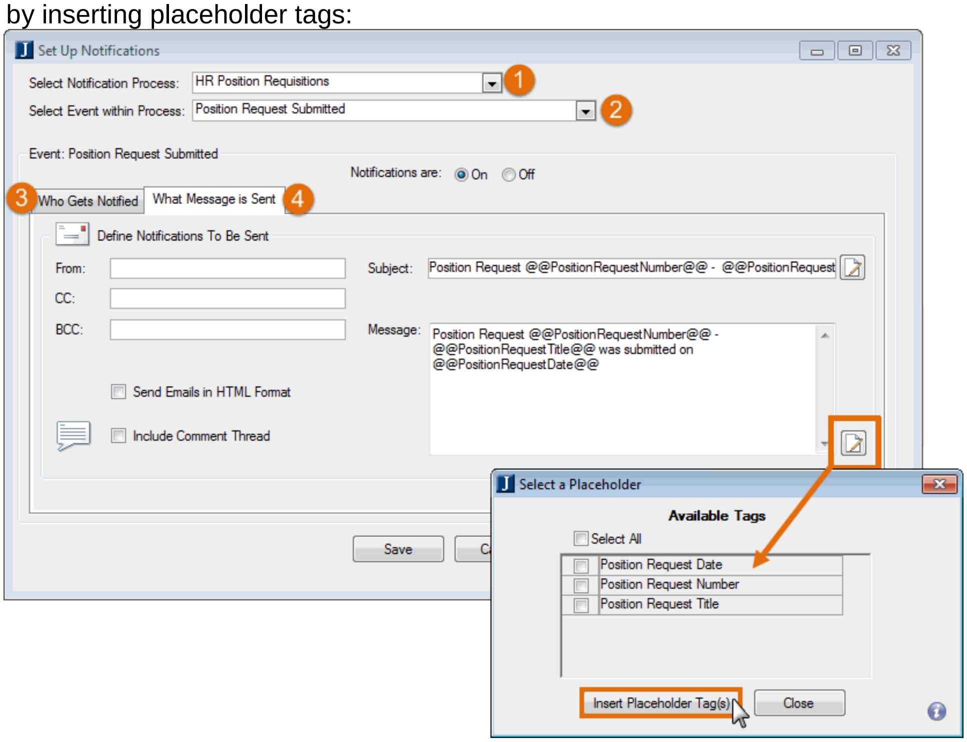


2 Each process has multiple event options, select one:

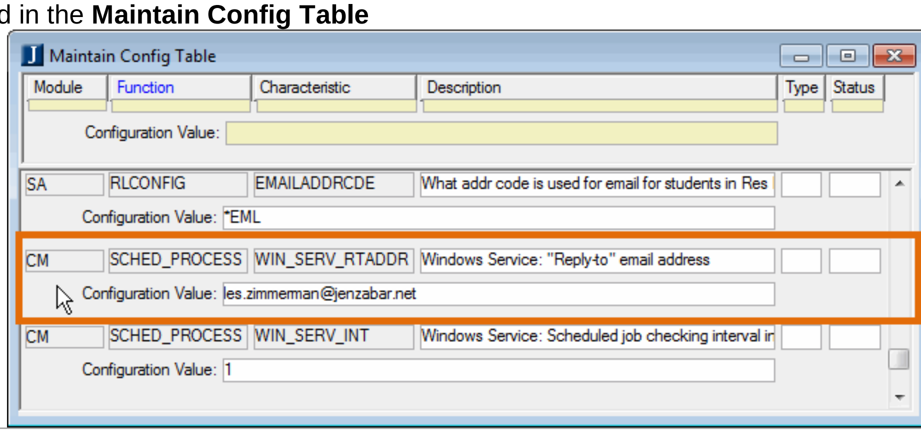


3 Select the checkboxes for any role(s) you want to receive notifications

4 Choose which role(s) to notify for each specific action. Then you can configure what message is sent by inserting placeholder tags:



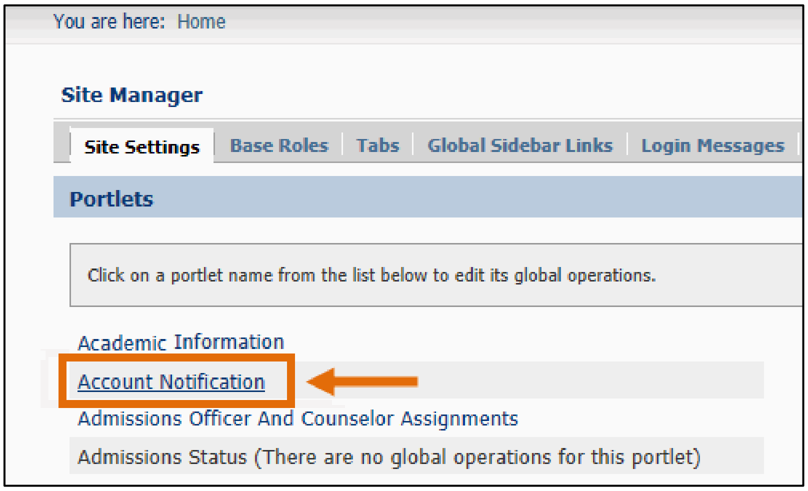
If you do not put an email address in the From field, it will send it from the email address specified in the **Maintain Config Table**



JICS Notifications

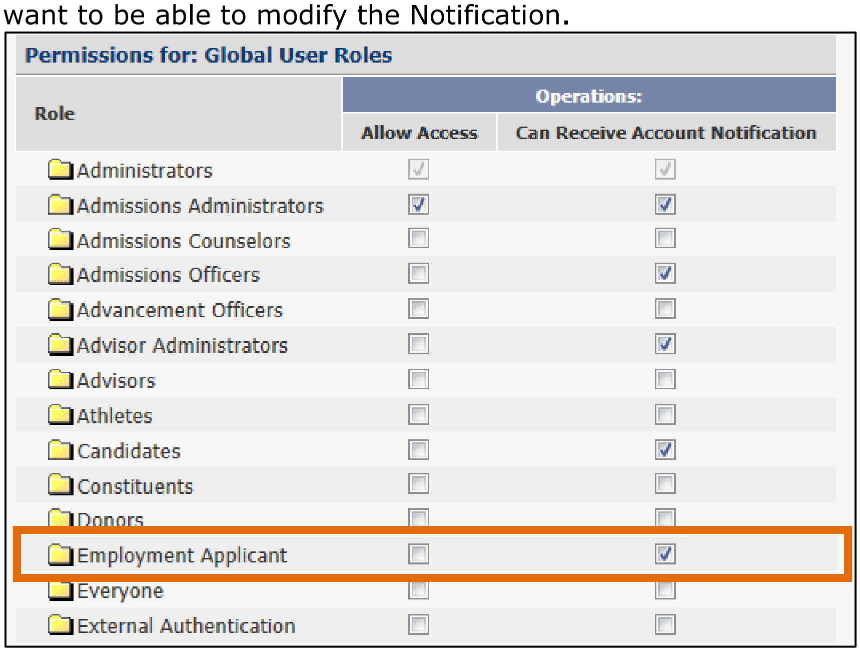
To setup account notifications, you will also need to check settings within JICS so that the user who submits their application will receive an automatic notification once it has been processed by HR via the **Process Internet Submissions** window.

1 Log into JICS as an administrator. Go to Site Manager → Global Portlet Operations and click on **Account Notification**:



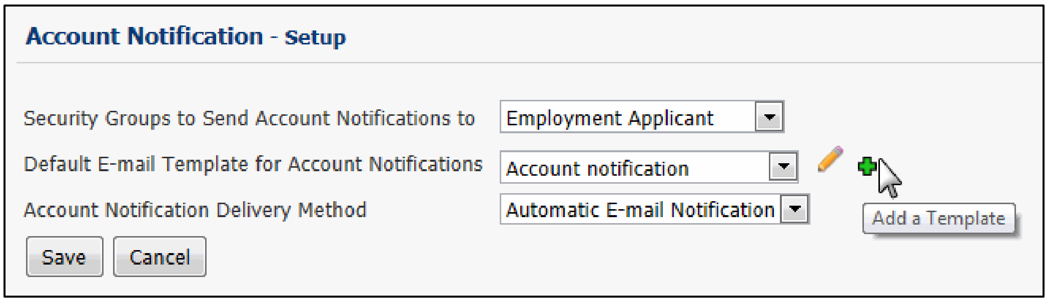
2 On the Employment Applicant row, click the ***Can Receive Account Notification*** box

3 Also, click the ***Allow Access*** box for the role(s), such as Staff Administrator, that you want to be able to modify the Notification.

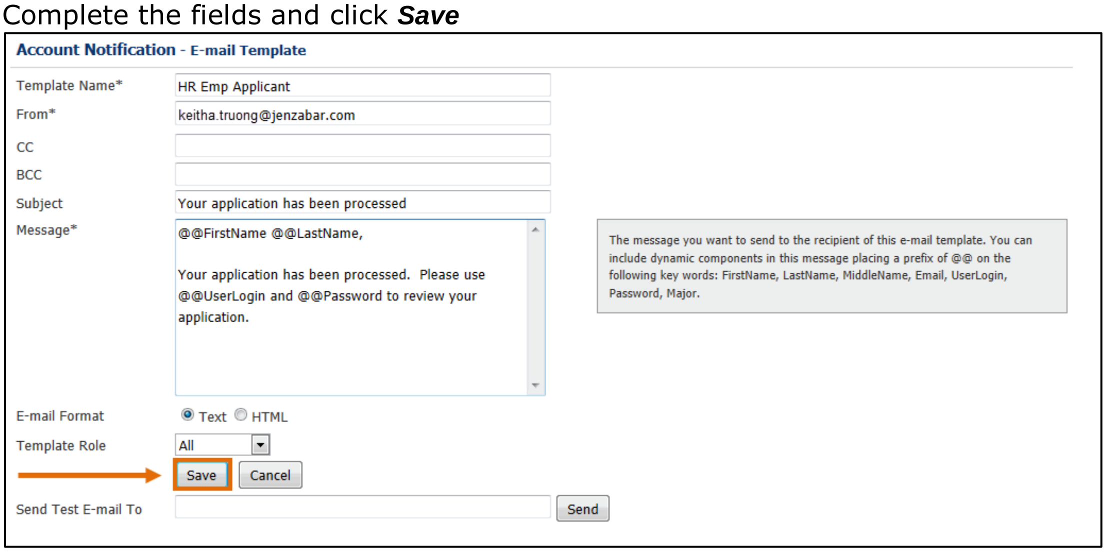


4 Next go to the **Account Notification** portlet

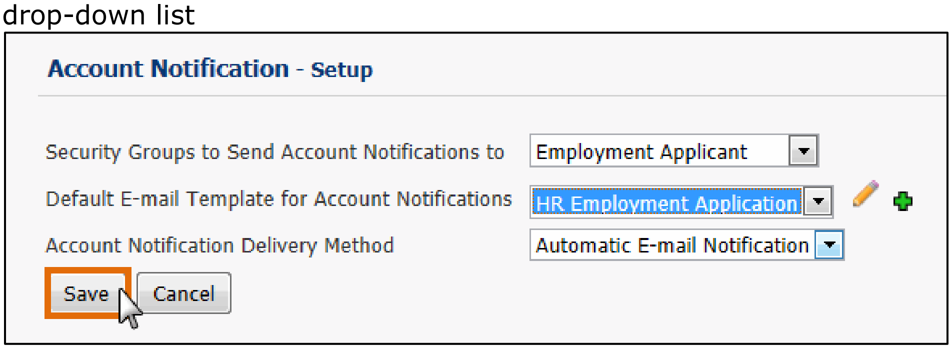
5 Click on ***Setup*** and select the icon to create a new e-mail template for your account notifications



6 Complete the fields and click ***Save***



7 Back on the **Account Notification – Setup** page, select the new template from the drop-down list



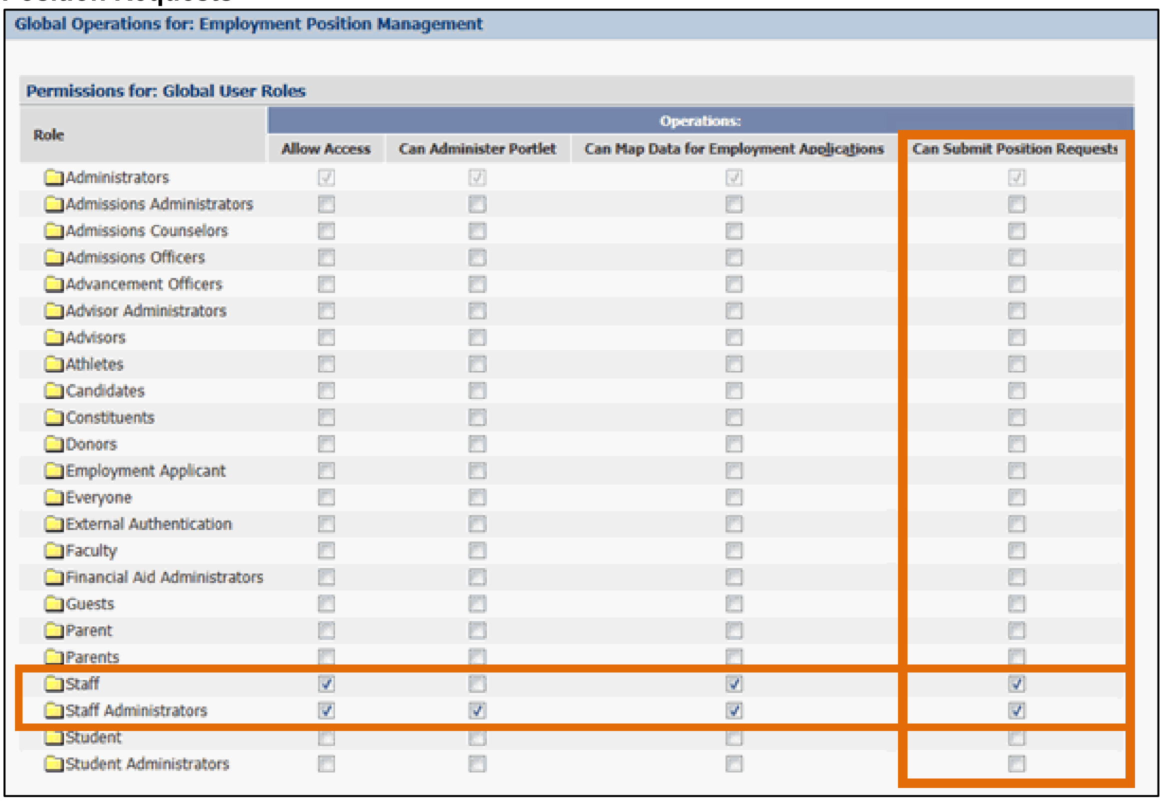
8 Click ***Save*** to apply the new template

Step 2: Request a Position

There are two ways to submit a position request. Via the **Employment Position Management** Portlet in JICS or via the **Review Position Requests** window in EX.

Request a Position in JICS

1 Log into JICS as a person who is in a roll that was provided access to **Can Submit Position Requests**



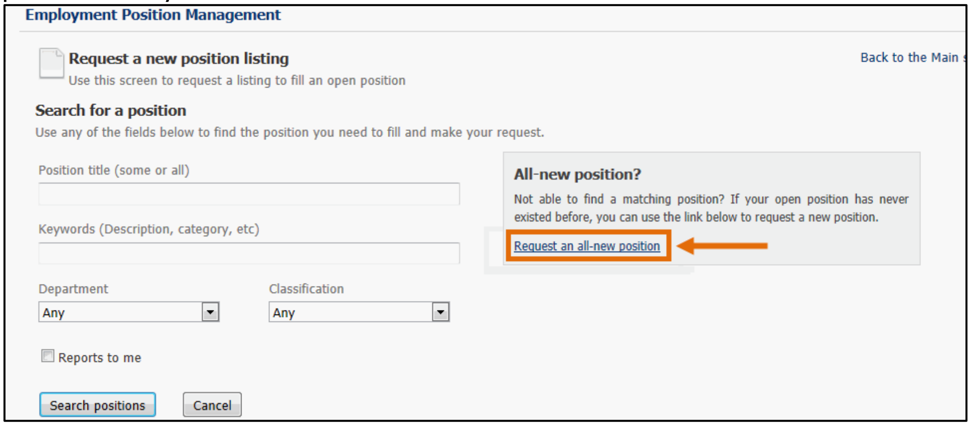
Global Operations for: Employment Position Management

Permissions for: Global User Roles

Role	Allow Access	Can Administer Portlet	Can Map Data for Employment Applications	Can Submit Position Requests
Administrators	✓	✓	✓	✓
Admissions Administrators				
Admissions Counselors				
Admissions Officers				
Advancement Officers				
Advisor Administrators				
Advisors				
Athletes				
Candidates				
Constituents				
Donors				
Employment Applicant				
Everyone				
External Authentication				
Faculty				
Financial Aid Administrators				
Guests				
Parent				
Parents				
Staff	✓		✓	✓
Staff Administrators	✓	✓	✓	✓
Student				
Student Administrators				

2 From the Employment Position Management portal, click ***new position listing***

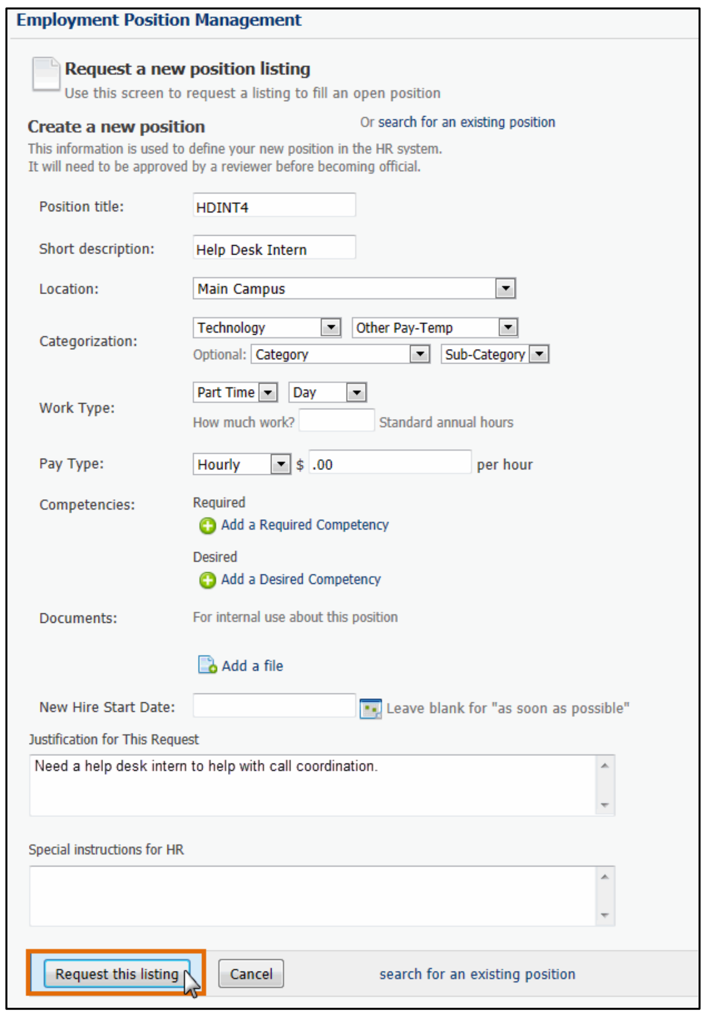
3 You can search for an existing position or create a new one if it is a brand new position for your school



If you need to hire another professor that would probably be an existing position that you could find in a search.

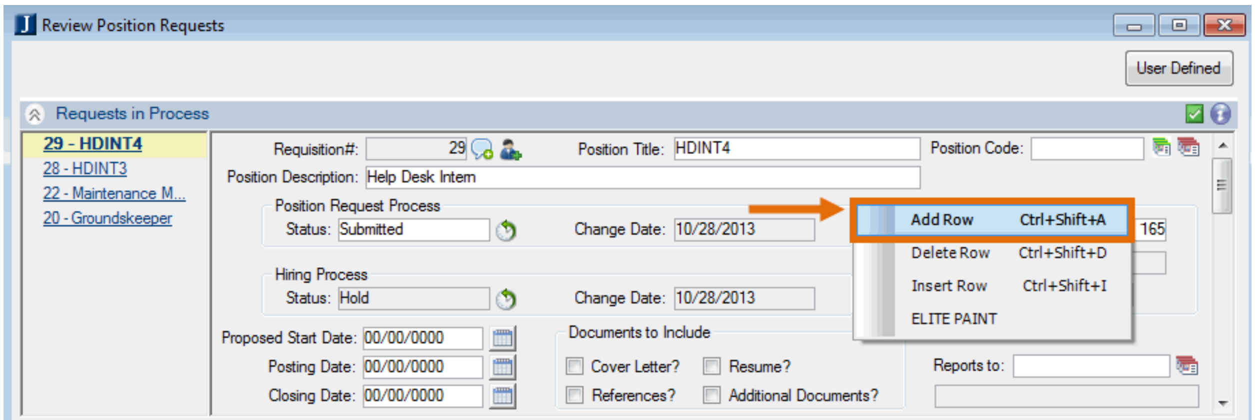
4 When you create a new position, you will need to complete the fields to the best of your ability

5 Once you have completed the form, click ***Request this listing*** to submit your position request

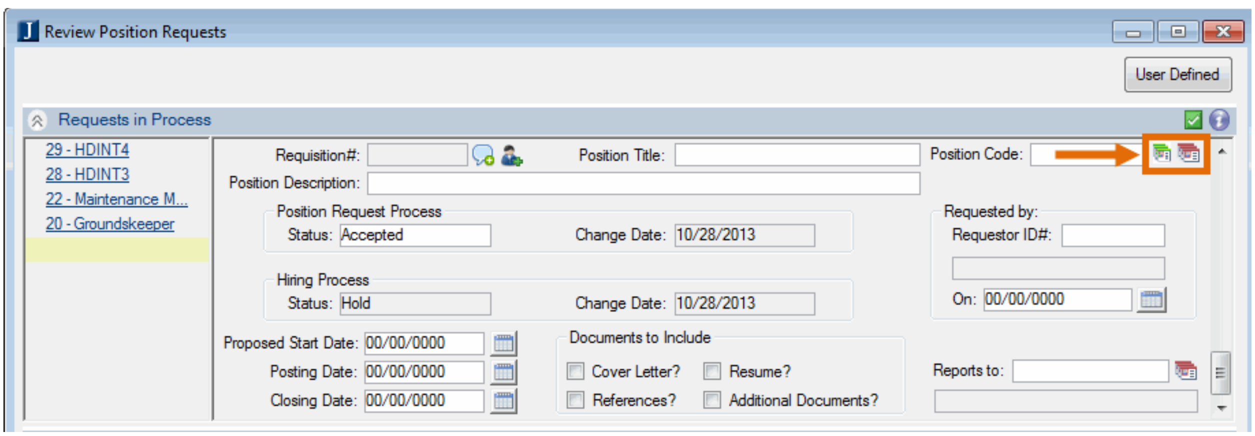


Request a Position in EX

1. Go to the **Review Position Requests** window
2. Right-click and choose ***Add Row***



3. Click the ***Create New Position*** button or ***Choose Existing Position*** button



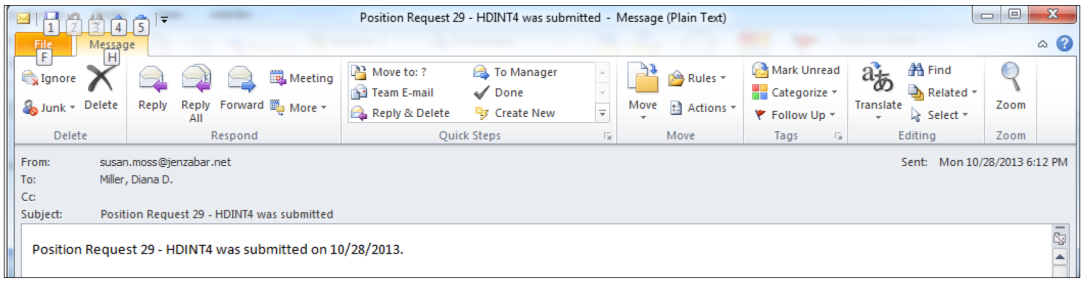
4. Complete the fields to the best of your ability
5. Save the request

Step 3: Review and Create a Position

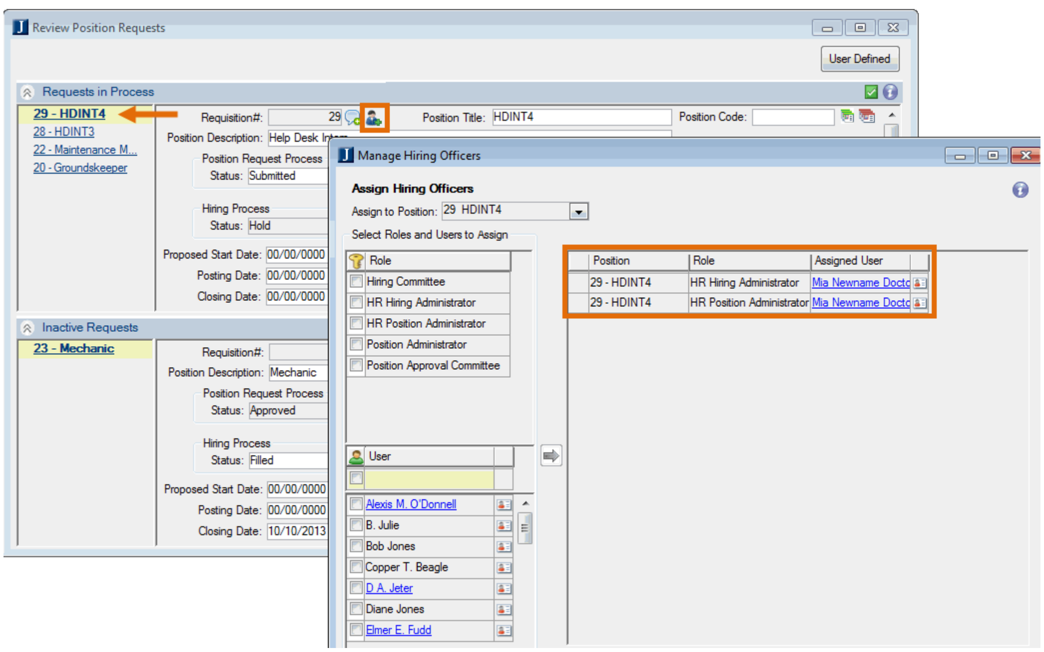
Once you have requests for new or existing positions, you will need to setup a system to approve or deny the requests.

Process the Position Request

As the HR Hiring Administrator, you will receive a notification that a position request has been submitted.



This email notification alerts you to go to the **Review Position Requests** window for the position requested and click on the Manage Hiring Officers icon.



You will see that by default, the employee setup as the HR Hiring Administrator and HR Position Administrator will be automatically put in to those roles for all position requests.

Depending on your organization's hiring procedures, what you do next will vary:

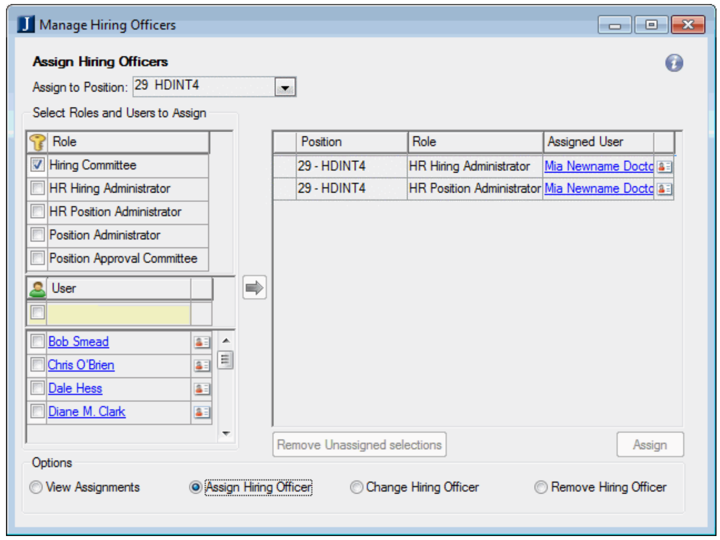
- If the position request will go through a position approval process, you will want to assign people to the Position Approval Committee.
- If you are not using an approval process, you can move straight to the hiring process and skip the Position Approval Committee and change the Position Request Status from Submitted to Approved.

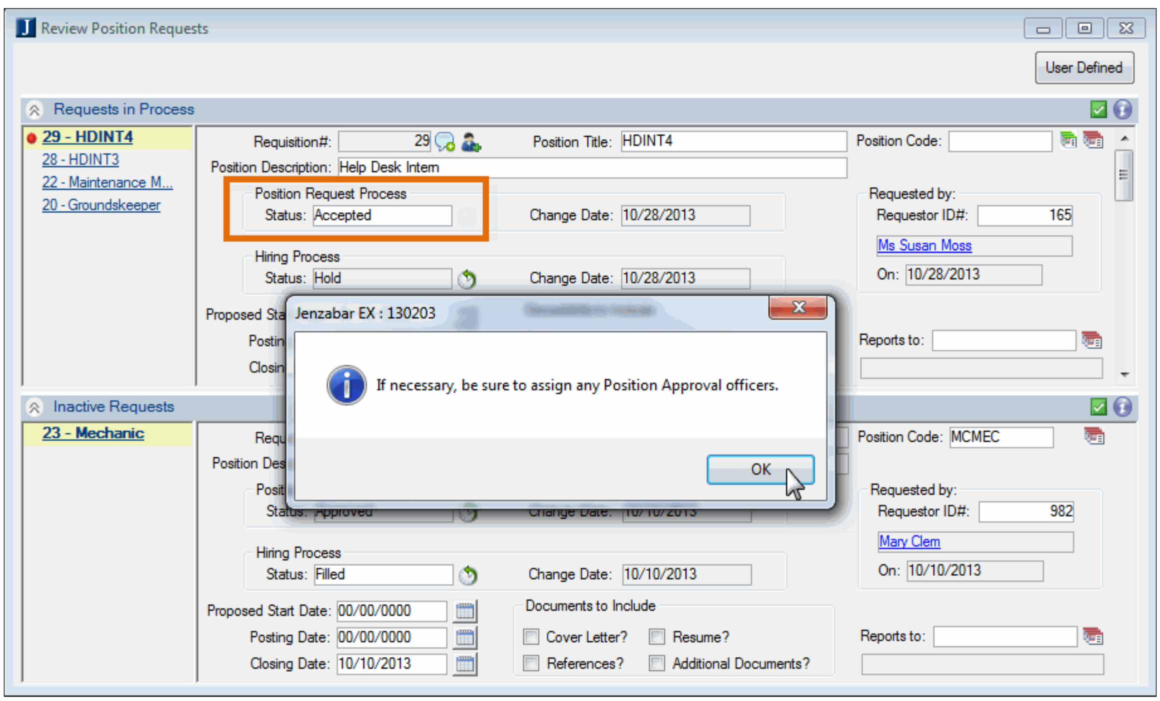
Assigning Hiring Officers

While the HR Hiring Administrator and the HR Position Administrator should be assigned automatically (these will pull from the Organization Positions window), if they are not, or if you would like to add another person, you can do so at this time.

Save and close the Manage Hiring Officers window.

Back on the **Review Position Requests** window, change the Position Request Status to ***Accepted***. You will see a warning to assign Position Approval Committee members.





In order for the Position Approval Committee to see the request, the Position Request Process status must be set to Accepted.

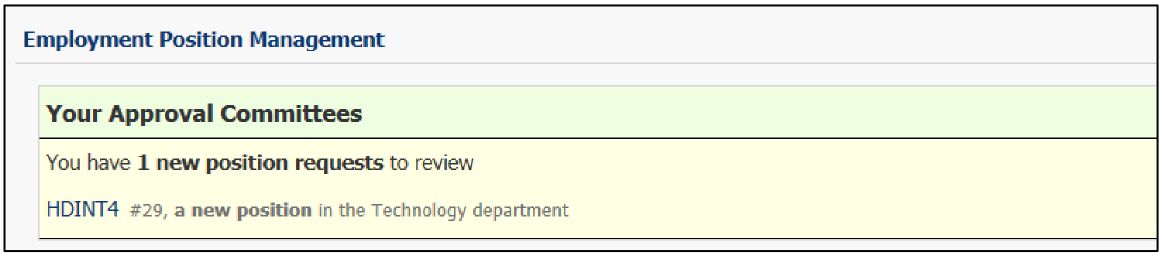
The Accepted status does not mean the position has been approved. You would use Accepted for situations where the position must go through a separate approval process before the hiring process can begin.

Approving/Denying - Position Approval Committee

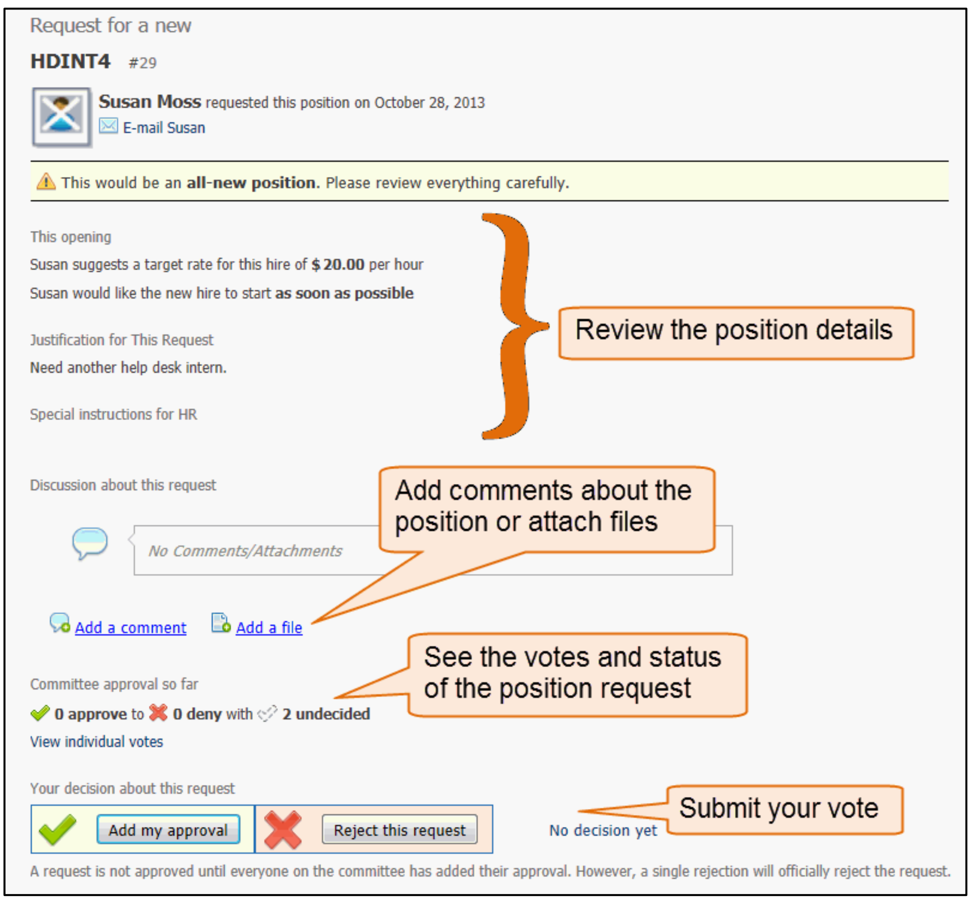
Once you have assigned your administrators, select the people you would like to be on the Position Approval Committee for this position.

At this point, the Approval Committee will need to approve or deny the position request from the Employment Position Management portal in CRM Staff.

1 Log into JICS as a person who is on the Approval Committee



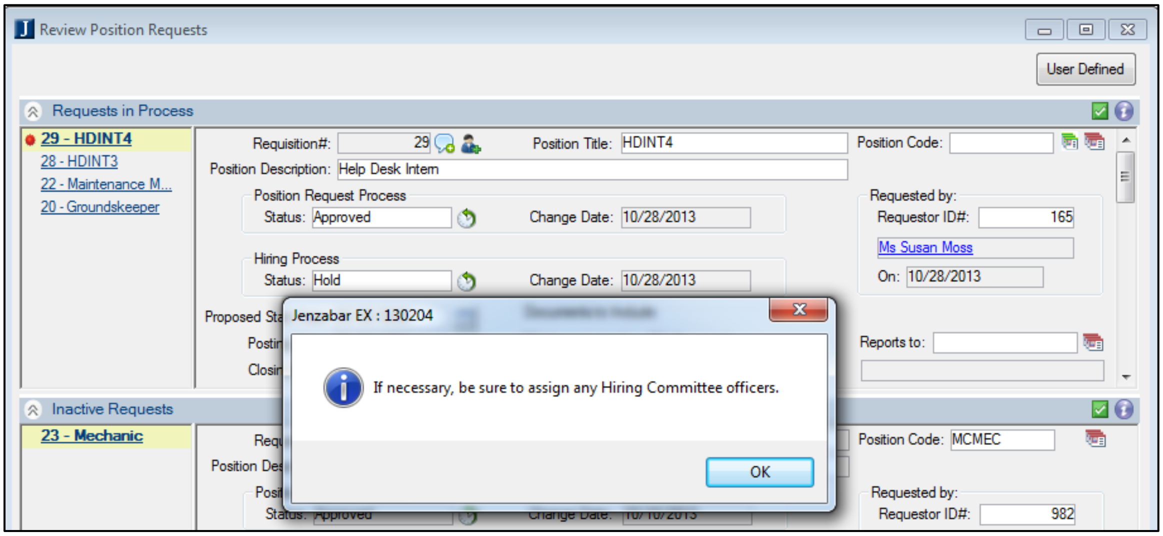
2 Click on the link for the position request to carefully review the position information



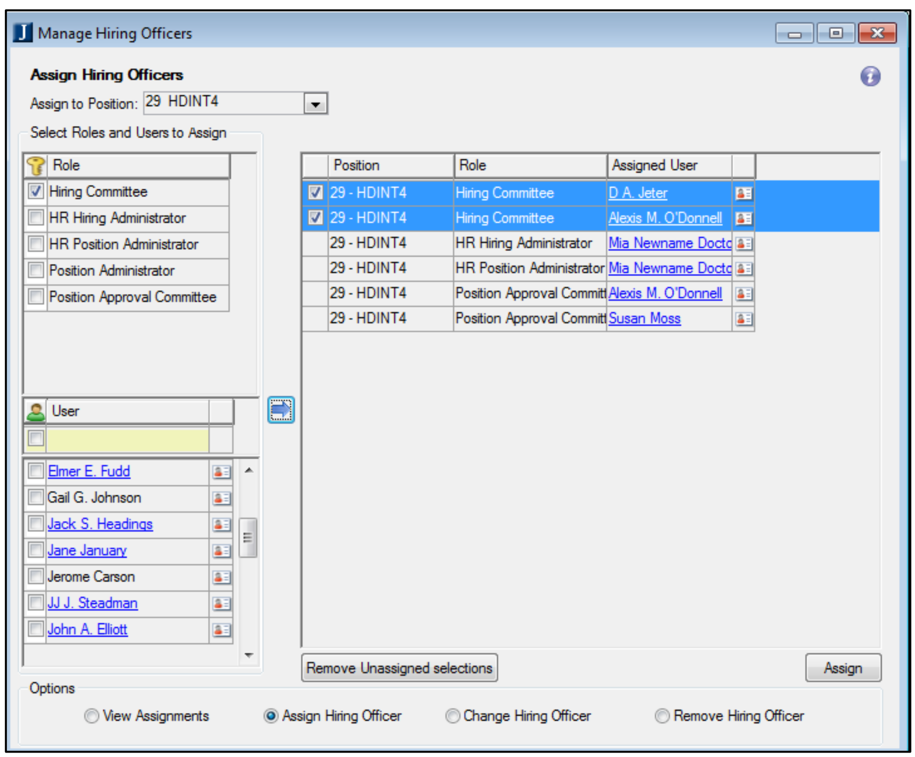
3 Once you have reviewed the details of the position, you can click the Add my approval or Reject this request button

Assigning a Hiring Committee

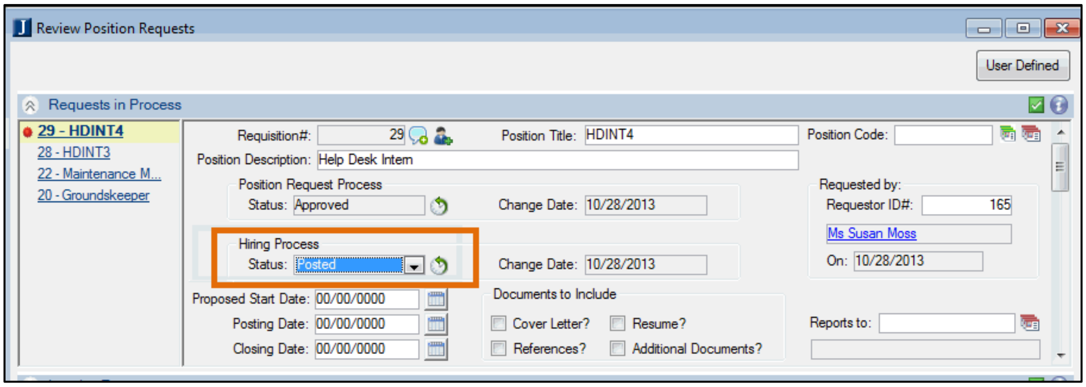
1. Once all members of the position approval committee have approved the position request in JICS, go back to the **Review Position Requests** window and set the status to ***Approved***



2. Next, assign Hiring Committee members on the **Manage Hiring Officers** window



3 Set Hiring Process Status to ***Posted*** so the Hiring Committee members will be able to see the position and applicants online



4 Log into JICS as a member of the hiring committee

From here, you will be able to view the position details and any applications

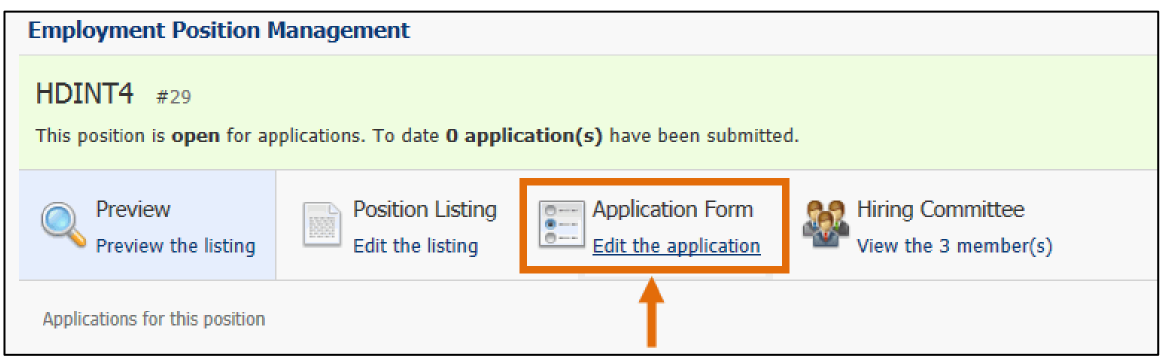
Step 4: Build Application Forms in Formbuilder

After you have a position created and you are ready for people to apply, you need to create an application form using Formbuilder.

1. To setup the application form, an HR administrator will go online and under **Positions you can review** and click on the position request

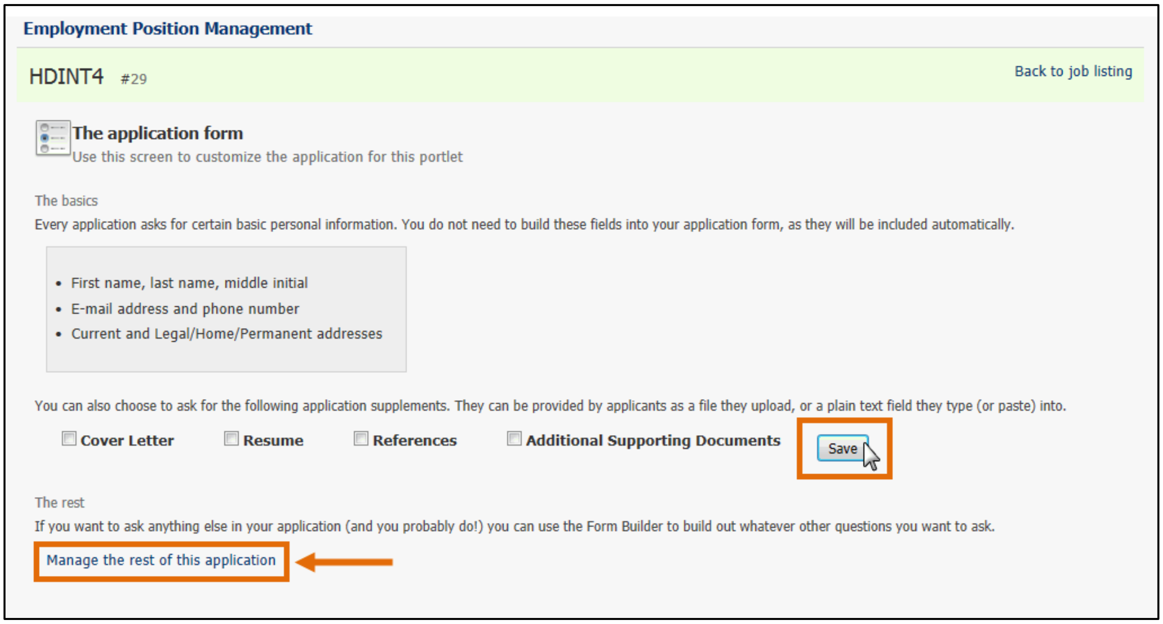
2. Here you can ***Preview the listing***, ***Edit the listing***, and ***Edit the application***

3. Click ***Edit the application*** (this is the necessary piece for the application it to appear online)



There are three basic elements (name, email, and address) that will appear on every application. If you do not want to ask for more than the basic information, you can click ***Save***, and the application will be visible online; however, most of the time, you will want to build a more comprehensive application.

4 Click ***Manage the rest of this application*** to begin customizing the application form for the position

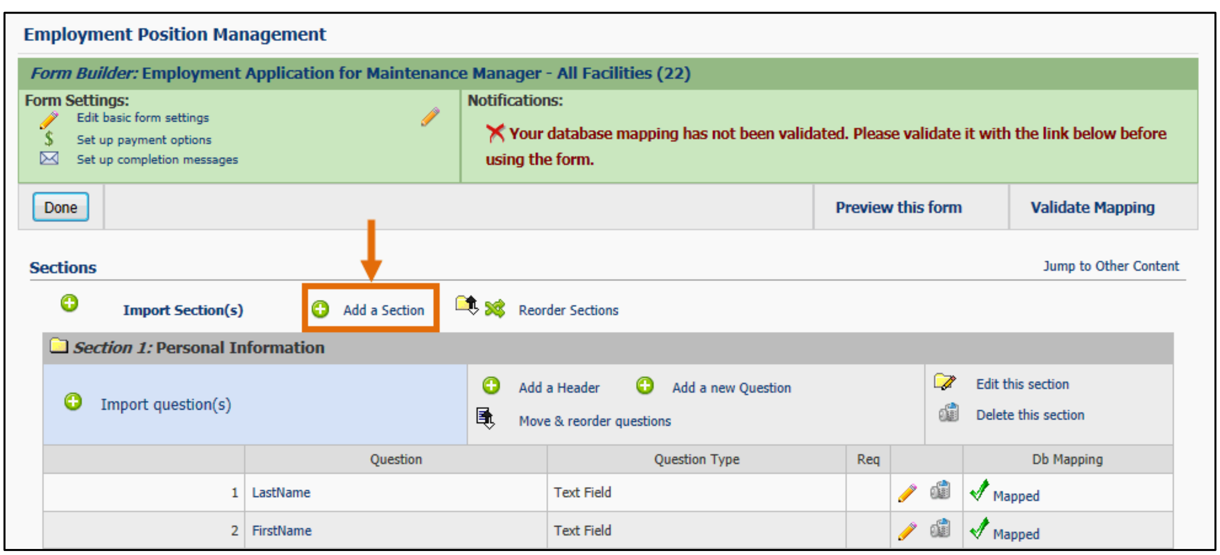


Customizing Your Application

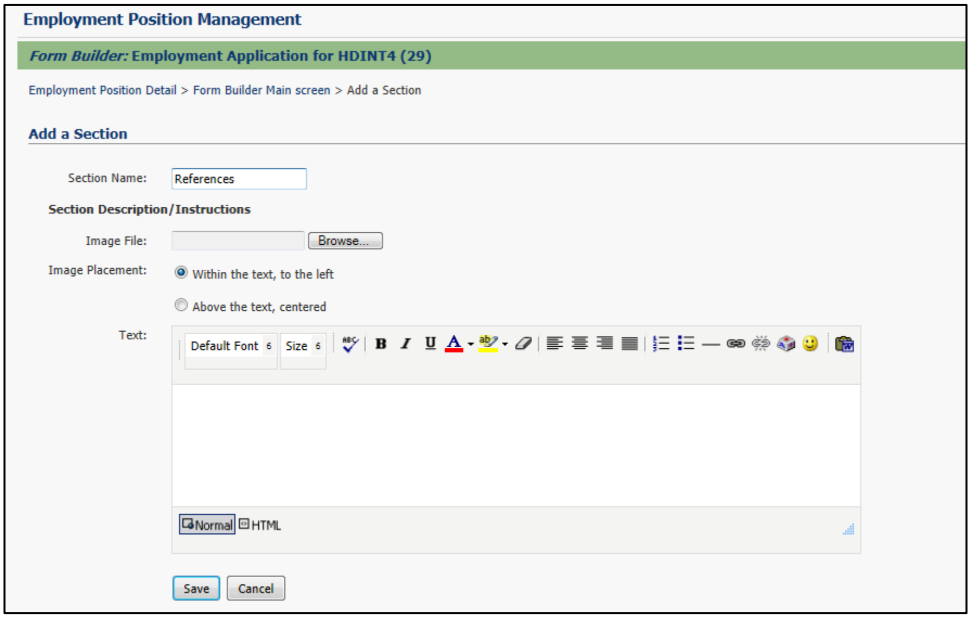
When building an application you will create sections and questions that will ask your applicants for information that will help you determine if the applicant is a good candidate for the position.

The steps below show an example of how you could build your application. When customizing your own form, the sections and questions will be different.

1 Click ***Add a Section*** to create a section for character references

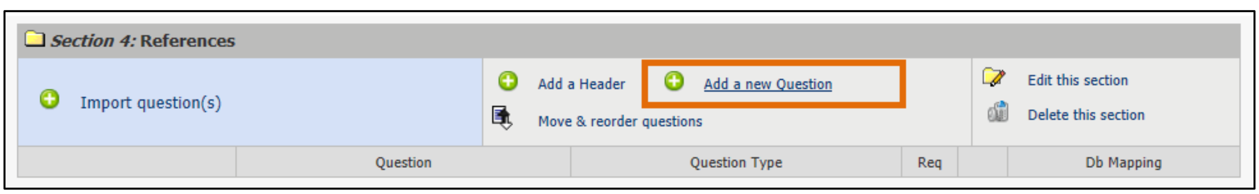


2 Enter a section name and a brief description for the new section, then click ***Save***

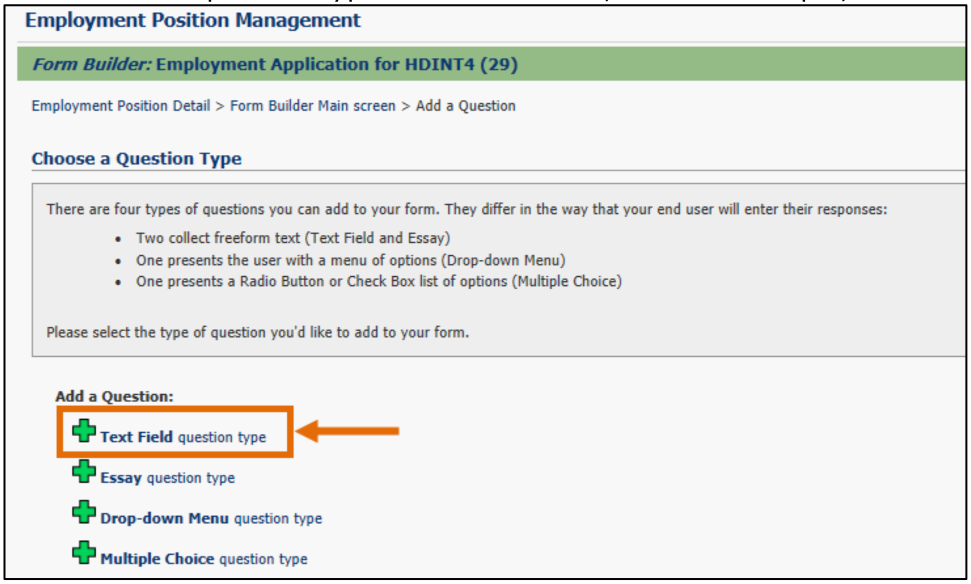


Back on the position application form, you will see a new section for references along with some options. You can edit or delete the section, add a header or questions, import questions, or reorder existing questions. Since the section is currently empty, you will need to either import or add questions.

3 Click ***Add a new Question***



4 You have four question types to choose from, for this example, select ***Text Field***


Employment Position Management

Form Builder: Employment Application for HDINT4 (29)

Employment Position Detail > Form Builder Main screen > Add a Question

Choose a Question Type

There are four types of questions you can add to your form. They differ in the way that your end user will enter their responses:

- Two collect freeform text (Text Field and Essay)
- One presents the user with a menu of options (Drop-down Menu)
- One presents a Radio Button or Check Box list of options (Multiple Choice)

Please select the type of question you'd like to add to your form.

Add a Question:

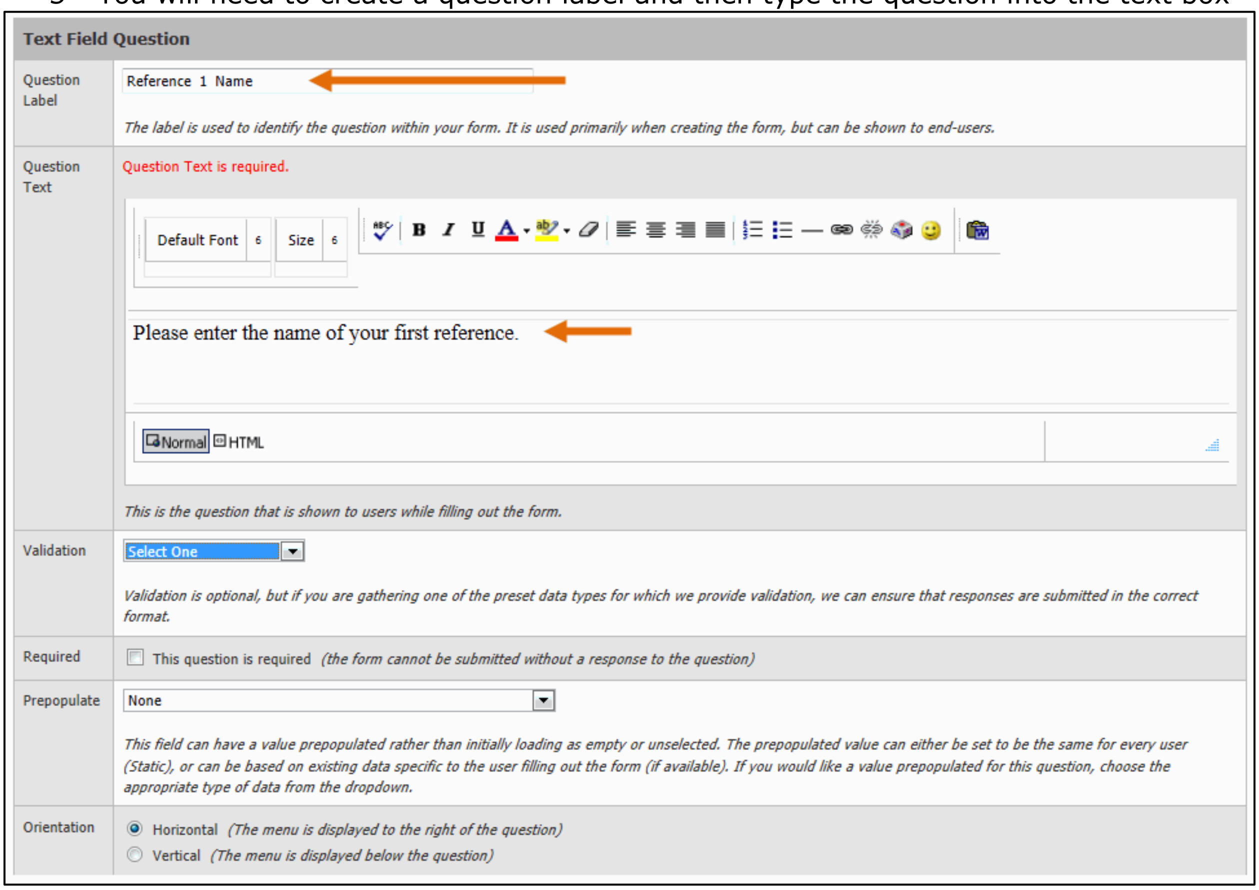
Text Field question type

Essay question type

Drop-down Menu question type

Multiple Choice question type

5 You will need to create a question label and then type the question into the text box


Text Field Question

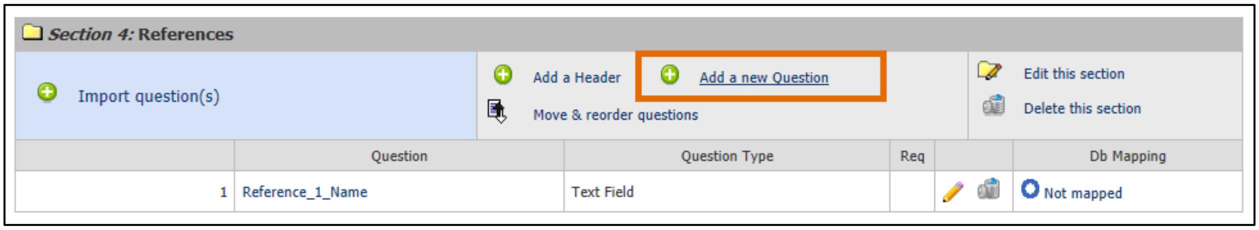
Question Label	Reference 1 Name *The label is used to identify the question within your form. It is used primarily when creating the form, but can be shown to end-users.*
Question Text	Question Text is required. Default Font Size Please enter the name of your first reference. Normal HTML *This is the question that is shown to users while filling out the form.*
Validation	Select One *Validation is optional, but if you are gathering one of the preset data types for which we provide validation, we can ensure that responses are submitted in the correct format.*
Required	This question is required *(the form cannot be submitted without a response to the question)*
Prepopulate	None *This field can have a value prepopulated rather than initially loading as empty or unselected. The prepopulated value can either be set to be the same for every user (Static), or can be based on existing data specific to the user filling out the form (if available). If you would like a value prepopulated for this question, choose the appropriate type of data from the dropdown.*
Orientation	Horizontal *(The menu is displayed to the right of the question)* Vertical *(The menu is displayed below the question)*

From this window, you also have the option to validate the data entered, require a response to the question, prepopulate data, and alter the orientation of the question.

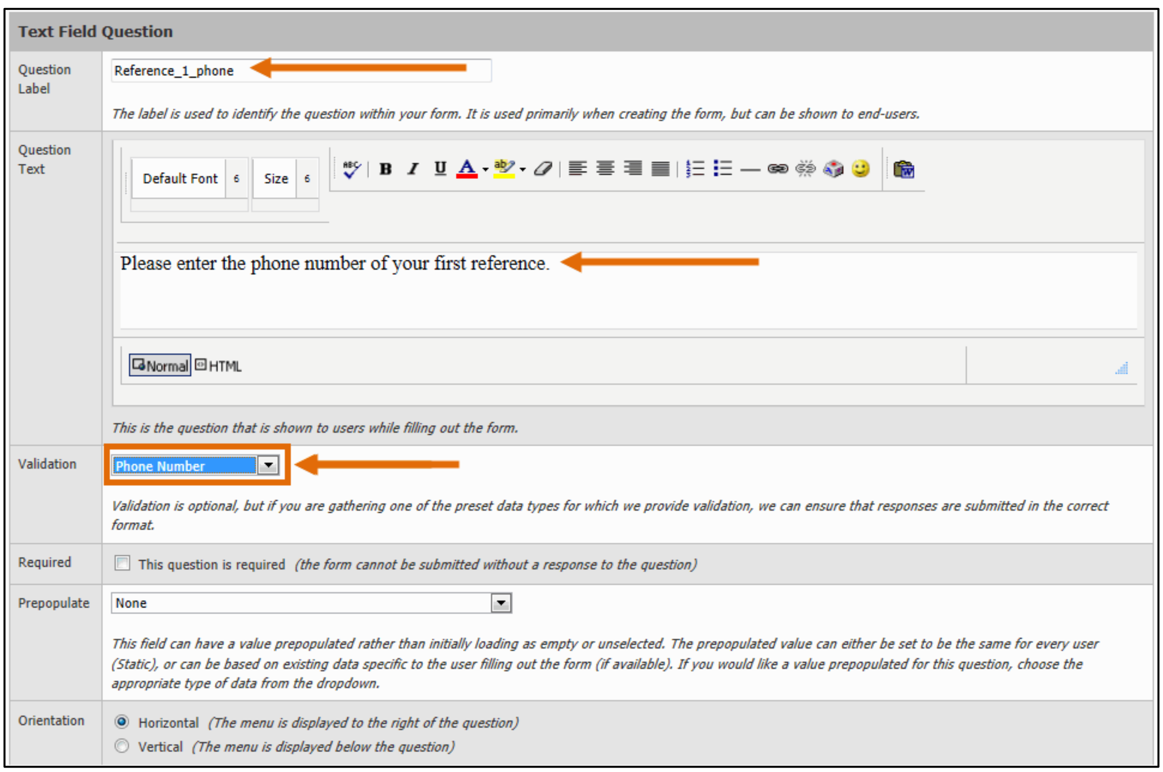
6 Make your selections, then click ***Save***

Now when you look at your References section, you will see your question listed. For a reference to be complete, in addition to the name, you will also want to have a way of contacting the references (such as a phone number).

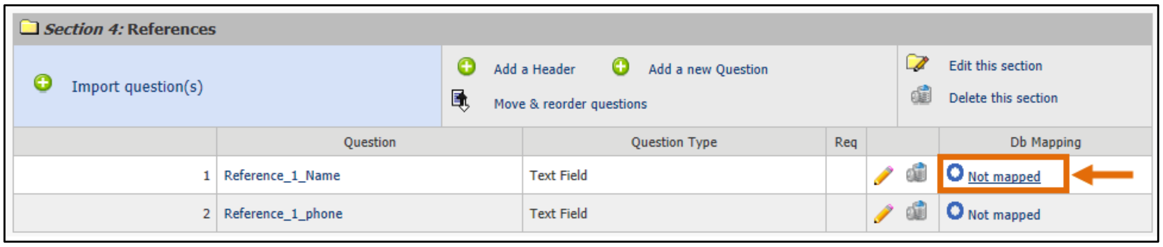
7 Click ***Add a new Question***



8 Follow the steps to add a new text question for a Reference Phone Number, and this time also select a ***Validation*** of ***Phone Number*** then ***Save***

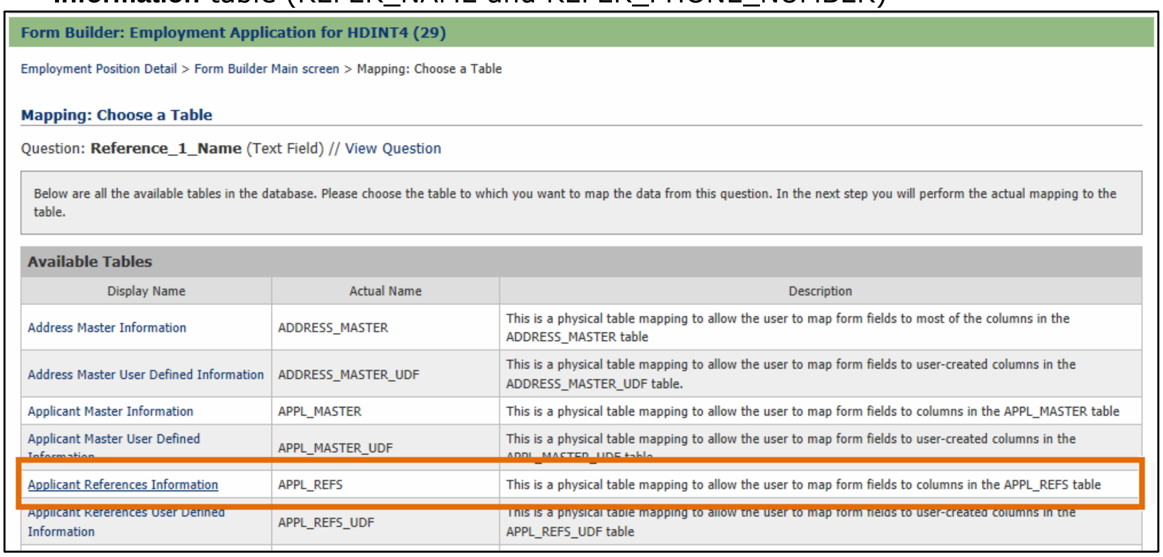


When you return to your Reference Section, you should now see a name and phone question for Reference 1. If you look to the far right column, you will see that the questions are not mapped.

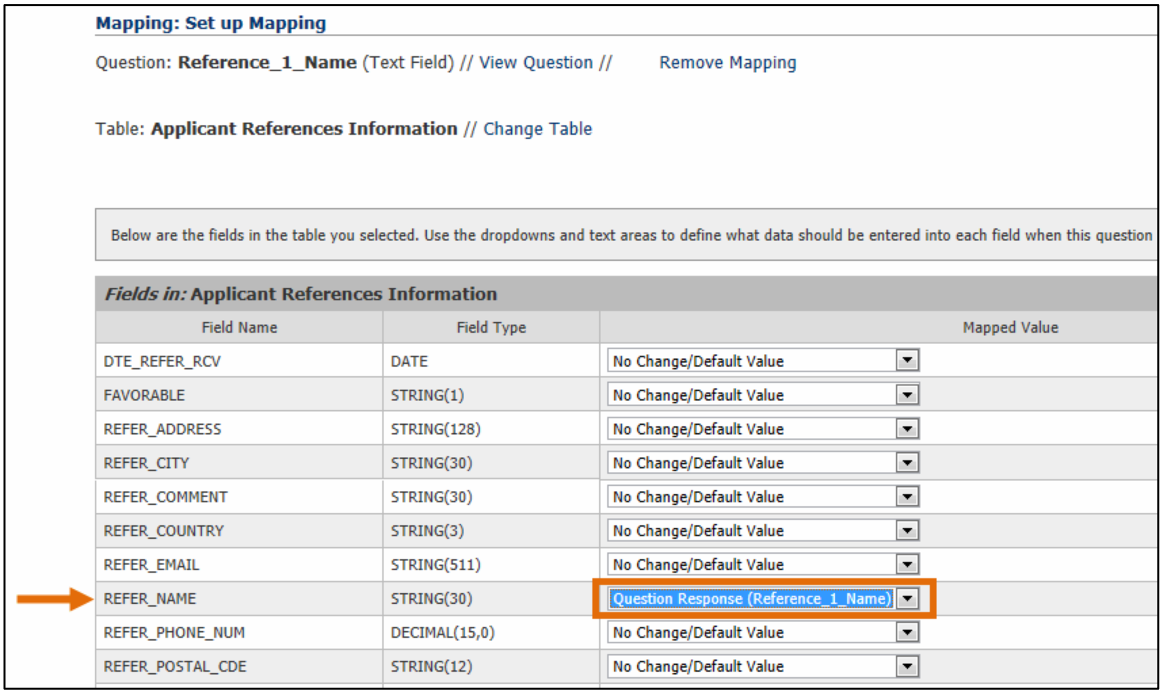


You must map the questions in order for the information to be stored on the Applicant Master table.

9 Click the ***Not mapped*** link to map both questions to the **Applicant References Information** table (REFER_NAME and REFER_PHONE_NUMBER)

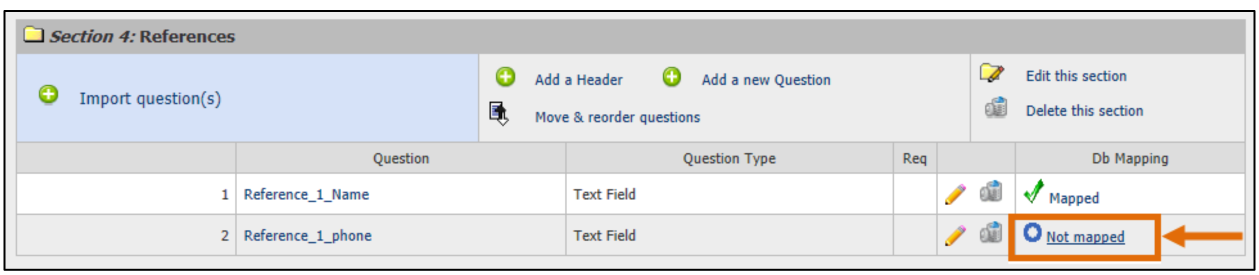


10 Find the REFER_NAME field and select ***Question Response (Reference_1_Name)*** from the drop-down box, then click ***Save***

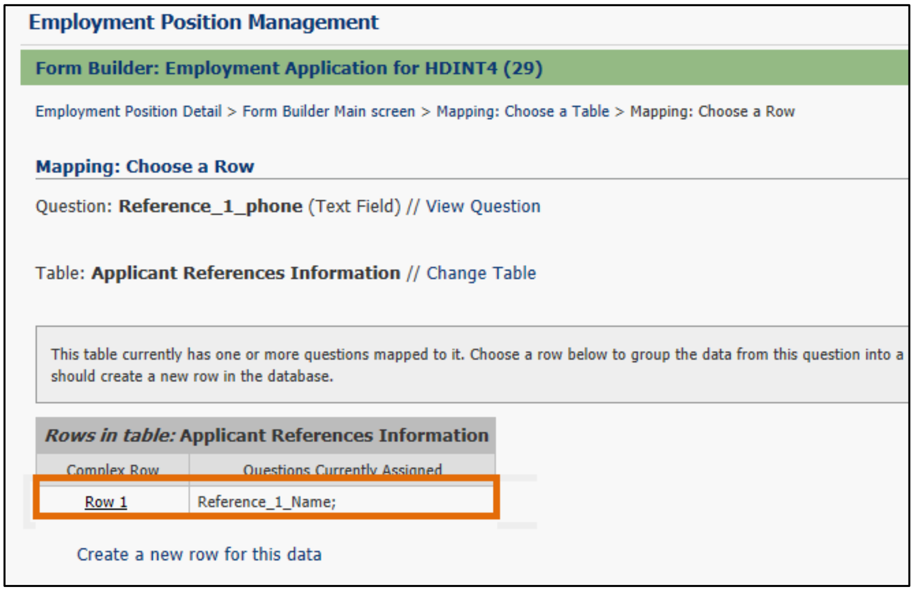


Notice that the status on the Reference_1_Name question has changed to Mapped.

11 Click the ***Not Mapped*** link for the Reference_1_phone



12 Select the ***Applicant Reference Information*** table

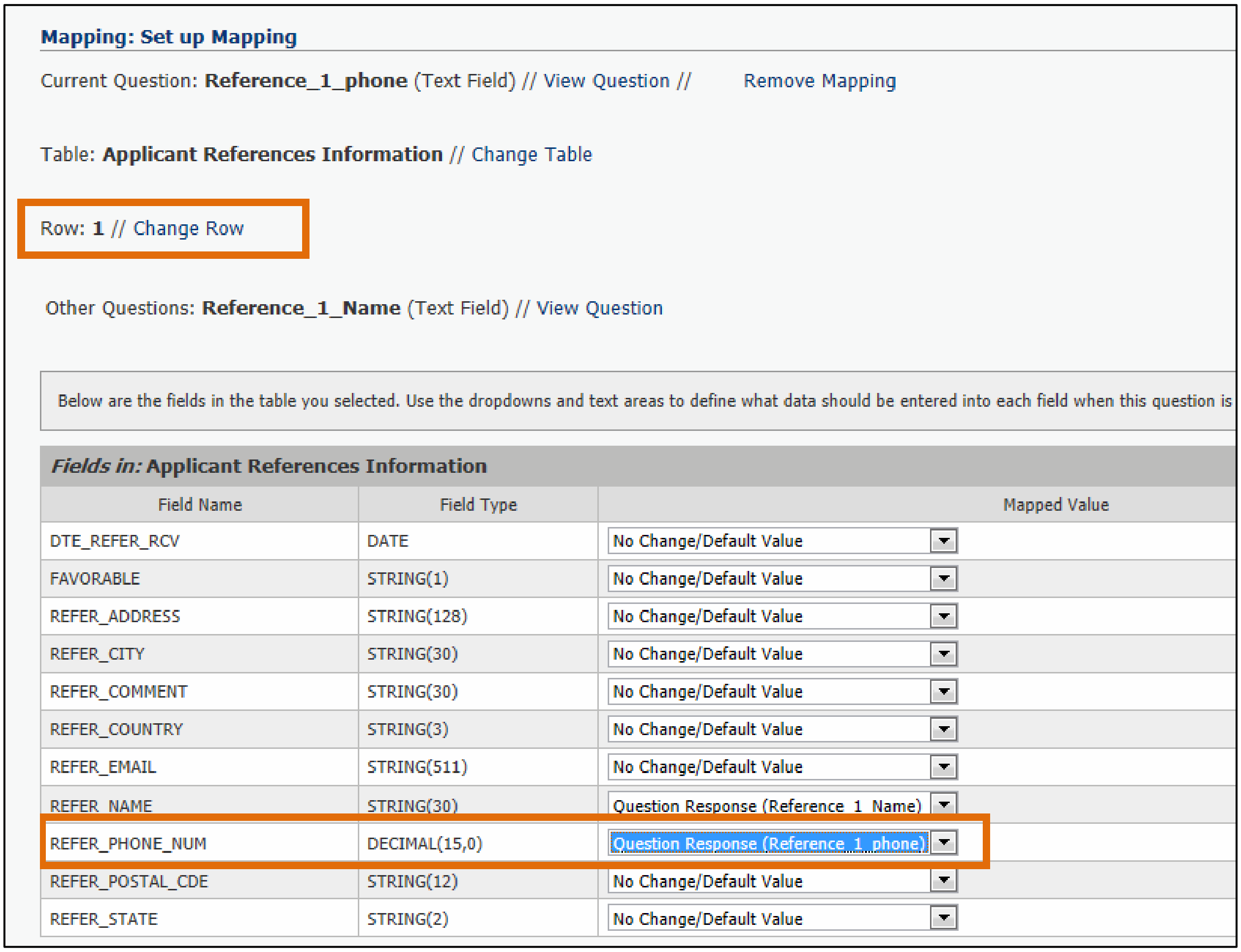


Because you have already mapped the Reference_1_Name question to this table, you have to decide if you want this question on the same row as the previous question, or on a new row.

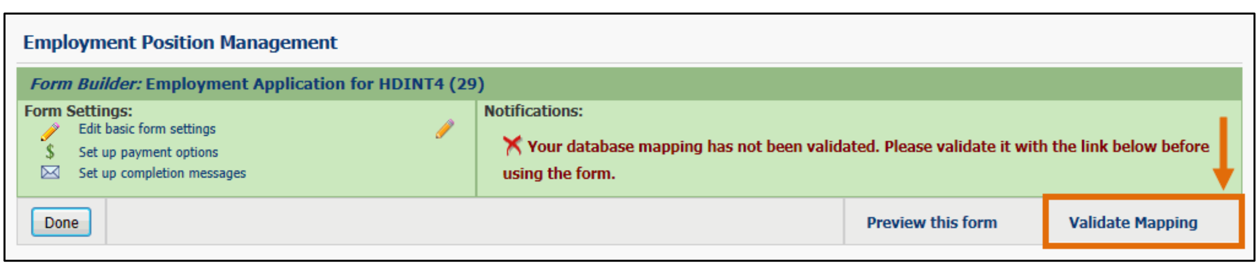
- ***Row 1:*** if the information in the second question goes along with the information from the first question, you would click Row 1 so that all the details stay together in the Applicant Master table. Because the name and phone number relate back to Reference 1, you would want the them to stay together on the same record.

- ***Create a new row for this data:*** If the information from the question does not go with the previous question, you would create a new row so that the new information will have its own record in the Applicant Master table. If the question related to Reference 2, you would want a new row to hold the information so that Reference 1 and Reference 2 details are separated on the Applicant Master.

13 Look through the fields list and find REFER_PHONE_NUM and select ***Question Response (Reference_1_phone)*** from the drop-down box, then click ***Save***

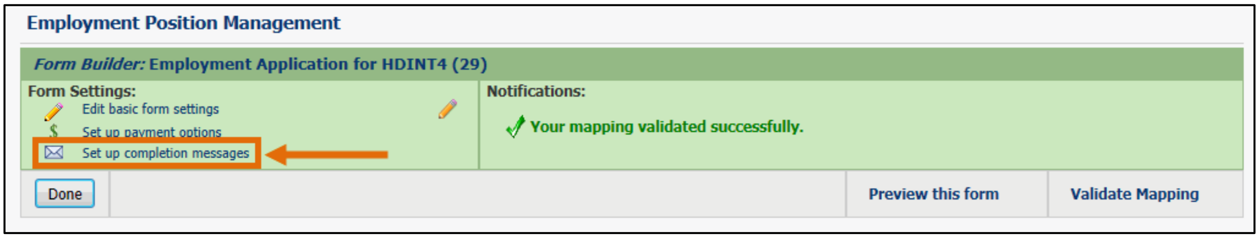


14 You will see a message in the Notifications section that your mapping will not be complete until validated, click ***Validate Mapping***

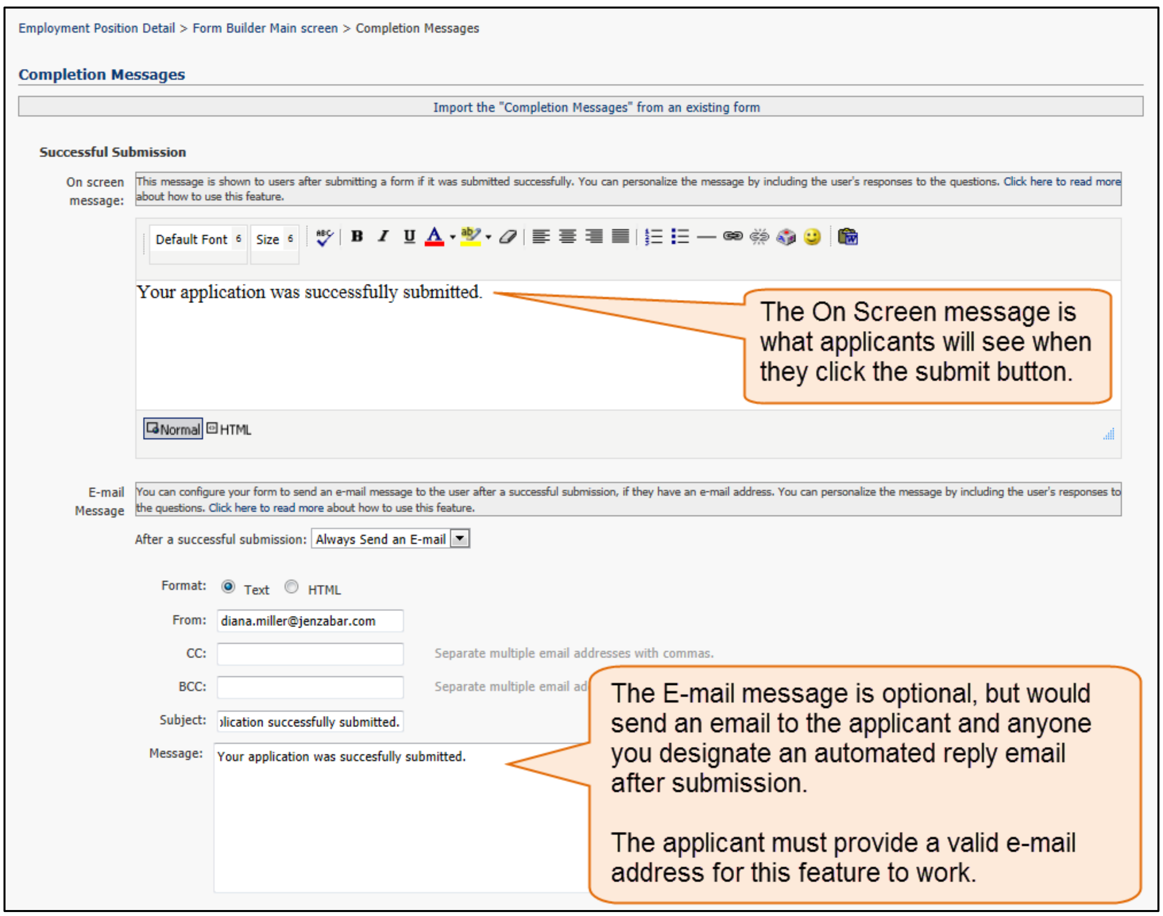


Once your mapping has been validated, you are almost finished. You now need to setup a message that applicants will see when they submit their application form.

15 Click ***Setup completion messages***



16 Write the messages that applicants will see for both a Successful and Unsuccessful application submission



17 Click ***Save***

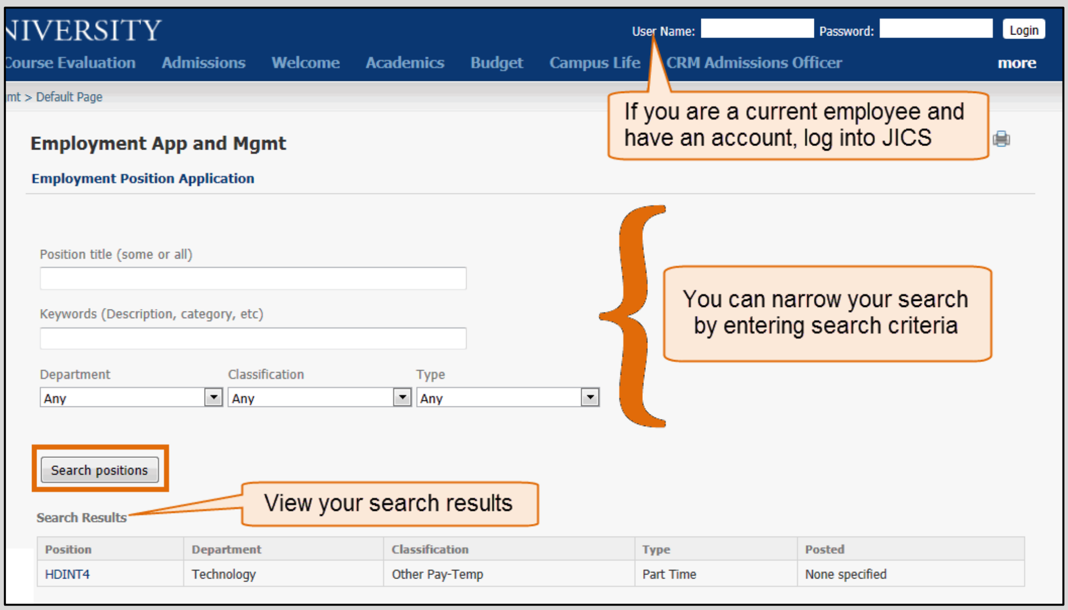
18 Click the link for **Employment Management** portlet to get out of Formbuilder after saving

Step 5: Submitting Applications

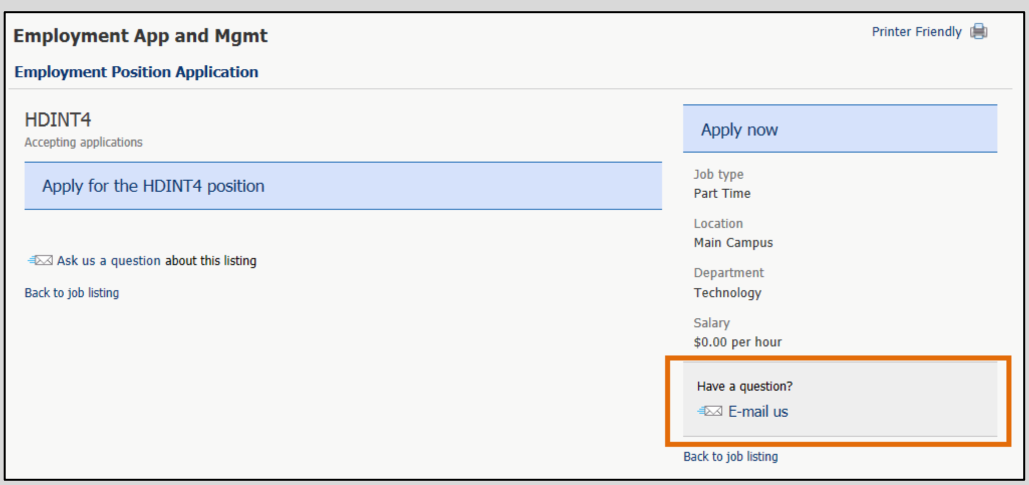
Once you have built an application form, people can apply for the position from the Employment Position Application portlet.

This step will be completed by the applicants.

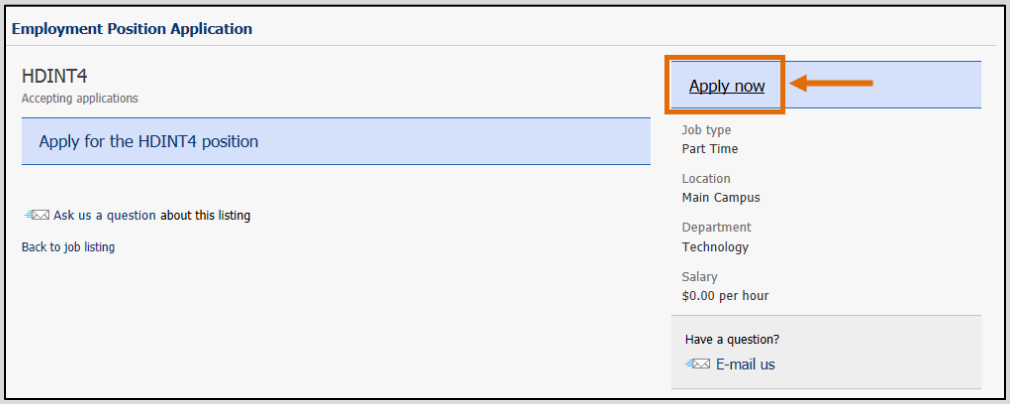
1 Apply for the position as a guest



2 Click on a position link to see position details

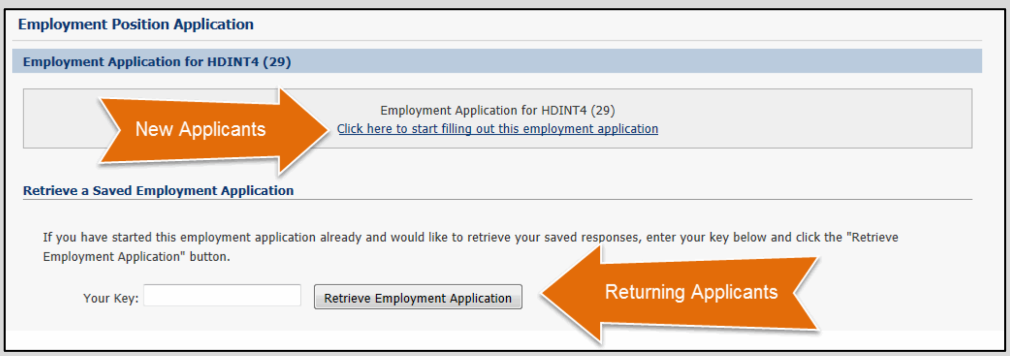


3 Click on ***Apply now***

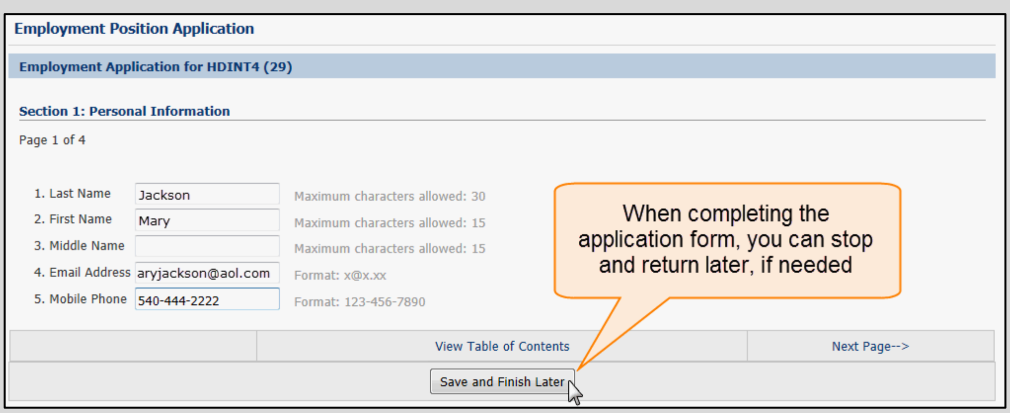


4 On the application page for the position, you have two options:

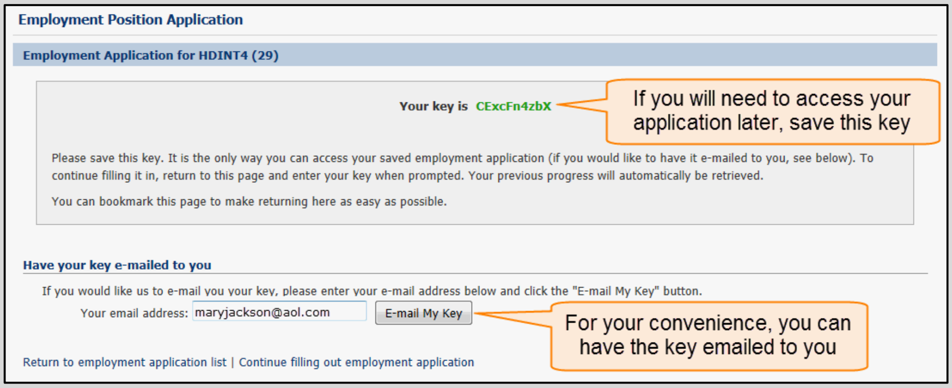
- If you are applying for the position the first time, click ***Click Here to start filling out this employment application***
- If you are coming back to finish a prior application, enter your key and click the ***Retrieve Employment Application*** button



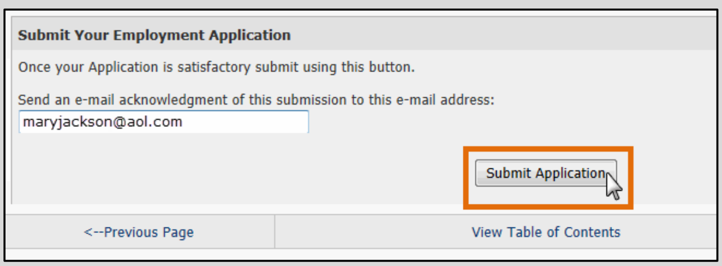
5 In the application, answer all the questions and then save or continue to the next page



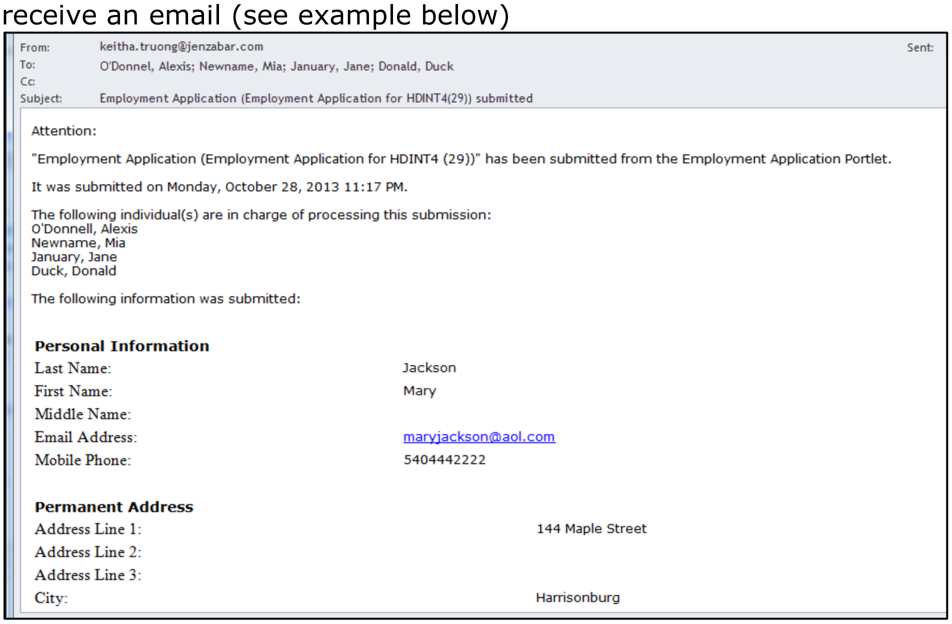
6 If you decide you need to finish the application at a later time, and click the Save and Finish Later button, you will be given a key that will allow you to return



7 Finish filling out the application, and on the last page, enter your email address and click ***Submit Application***



8 The user(s) in the group designated to be notified when an application is will receive an email (see example below)



From: keitha.truong@jenzabar.com Sent:
To: O'Donnel, Alexis; Newname, Mia; January, Jane; Donald, Duck
Cc:
Subject: Employment Application (Employment Application for HDINT4(29)) submitted

Attention:

"Employment Application (Employment Application for HDINT4 (29))" has been submitted from the Employment Application Portlet.

It was submitted on Monday, October 28, 2013 11:17 PM.

The following individual(s) are in charge of processing this submission:
O'Donnell, Alexis
Newname, Mia
January, Jane
Duck, Donald

The following information was submitted:

Personal Information

Last Name:	Jackson
First Name:	Mary
Middle Name:	
Email Address:	maryjackson@aol.com
Mobile Phone:	5404442222

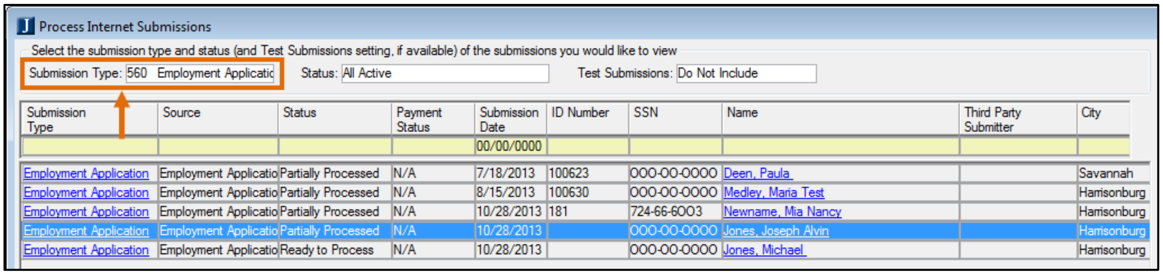
Permanent Address

Address Line 1:	144 Maple Street
Address Line 2:	
Address Line 3:	
City:	Harrisonburg

STEP 6: PROCESS APPLICATIONS

Once you receive applications, you will need to process them in EX.

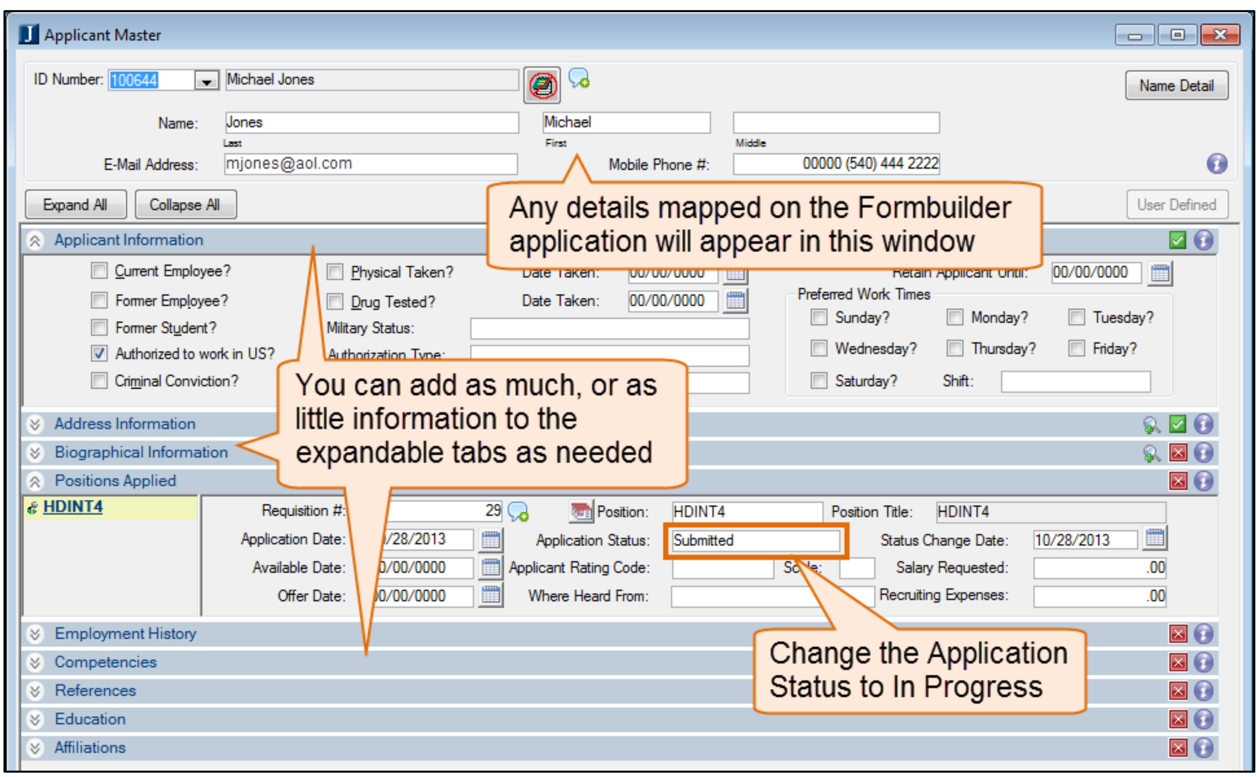
1 Go to the **Process Internet Submissions** window in EX



2 Select the submission you want to view, for this example, we will be looking at Joseph A. Jones Submission Type 560 Employment Application

3 Double-click the row to view the submission details

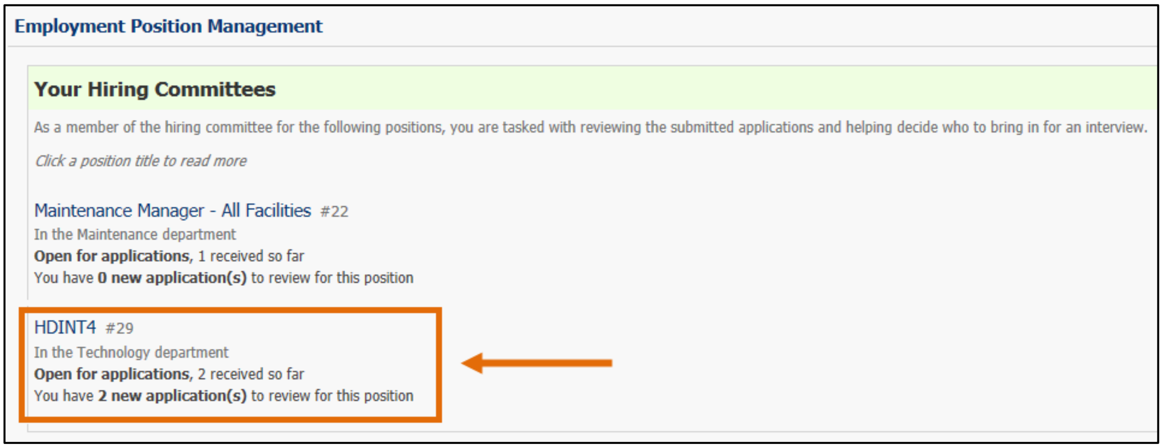
4 When you are ready to process a submission, highlight the row and click ***Process*** to go to the **Applicant Master**
- Duplicate Name search will come up if applicable. Research as to whether this is an existing person in your database or a new person.
- If it is a new id, click on ***No Match – New ID***. Then when the **Applicant Master** window comes up, click on ***Save***. This will assign an id number to the applicant.



5 Set the application status for the position to ***In Progress***

6 Log into JICS as a member of the hiring committee

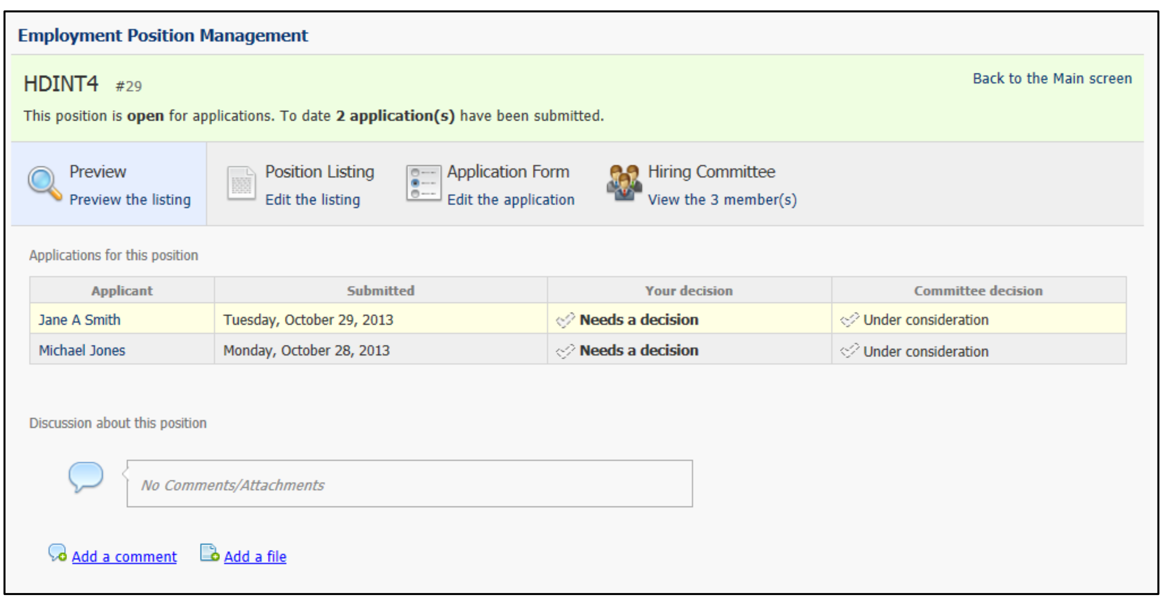
7 You will see any applications that you can review for any positions where you are on the hiring committee, click on the position you want to view



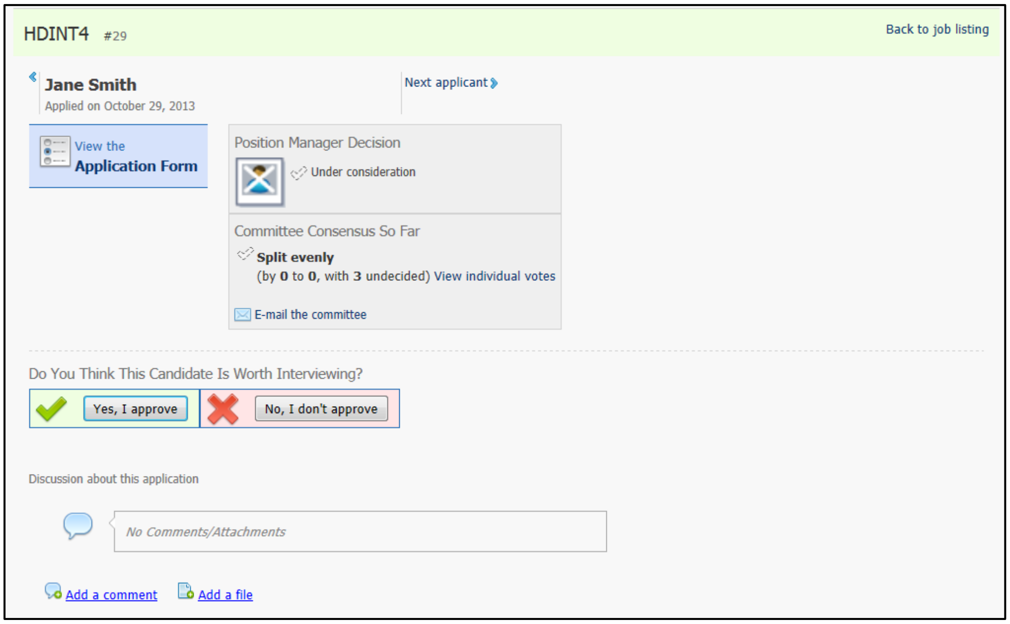
Make sure all people in hiring admin position have the position status set to Active or a row will not be written to ORG_POS_APPL_APPROVAL_HIST.

Do not change status of applicant to Approved and then back to In Progress. Setting them to Approved flips the flag on the Position Request to Filled, but setting it back does not undo that change.

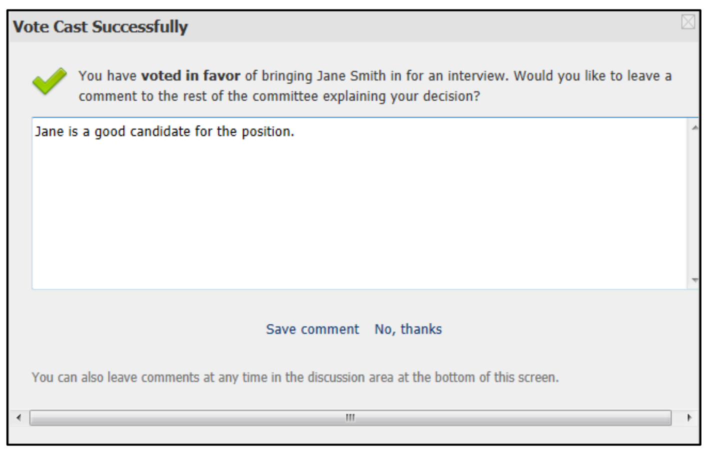
8 Click on the row of the person who's application you want to review



9 After careful evaluation of the applicant, click the ***Yes, I Approve*** or ***No, I don't Approve*** button to approve or deny the candidate



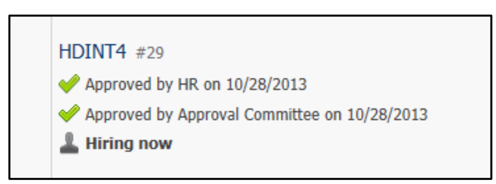
10 If you have any comments about your approval or denial, enter them here



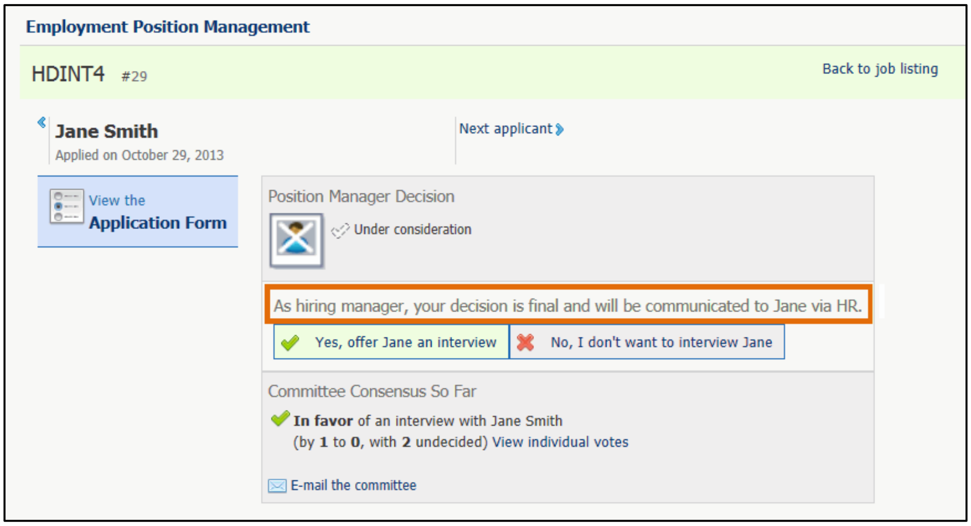
Any comments entered can be read by other members of the Hiring Committee or the HR Position Administrator.

HR Position Administrator Approval

1 When the HR Position Administrator or the HR Administrator signs into the **Employment Position Management** portal, they will see the status of applicants for a position

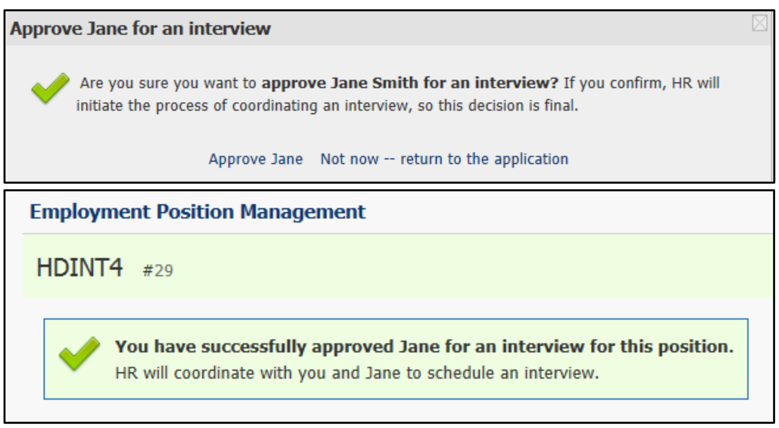


2 Locate the position request



Be aware, that the hiring manager, can override the committee's decision and deny this person or go ahead and offer the interview without full committee approval.

3 Approve an individual that you want to continue on to the interview process



4 Return to the **Applicant Master** window in EX, and change the Application Status to ***Interview***

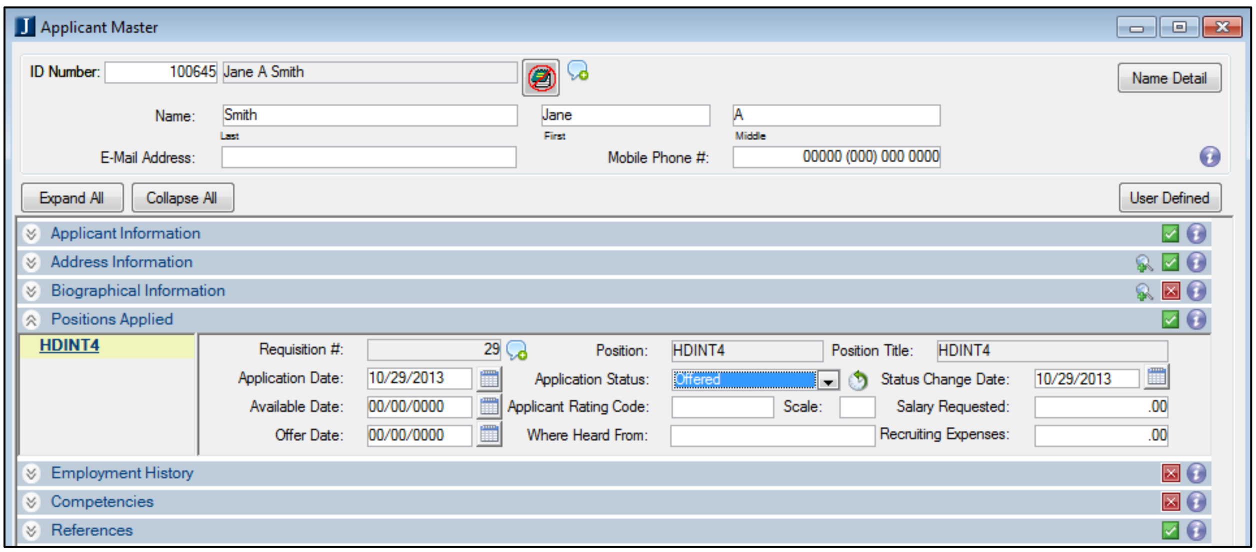
5 At this point in the applicant tracking process, you will start to interview and evaluate the approved applicants

Step 7: Hire an Applicant

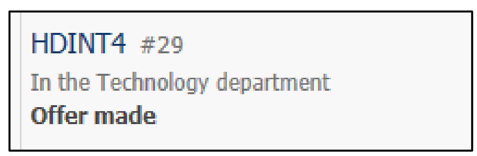
Once the interviewing process is complete, and you have selected an applicant for the position, you will need to make an offer to the chosen applicant.

There is no automatic method for making an offer, so you will need to call or write the applicant.

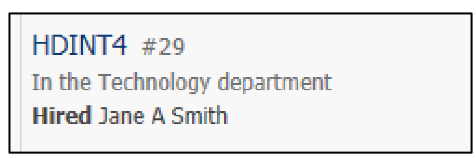
In EX, you will go back to the **Applicant Master** window and access the applicant's record. Change the Application Status to ***Offered***.



When the Application Status is changed to ***Offered***, the Hiring Committee will see that an offer has been made.

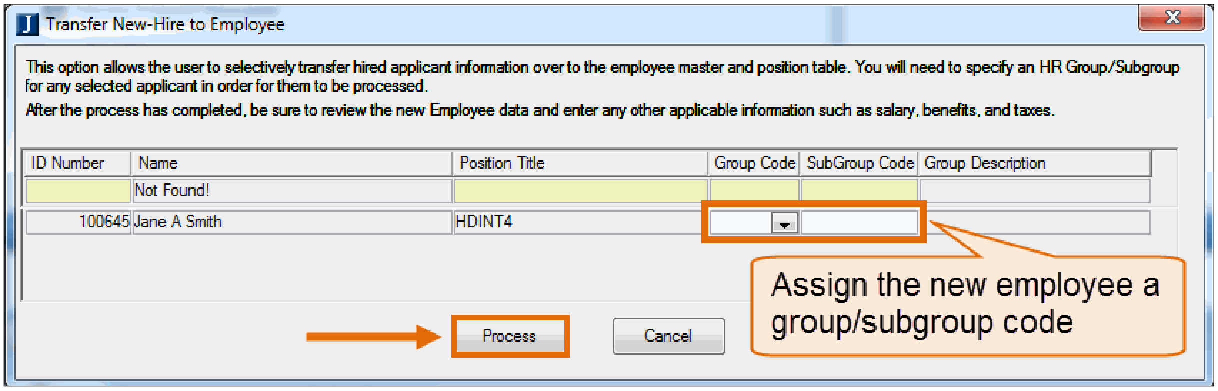


If the employee accepts, update the Applicant Status to ***Accepted***, then the Hiring Committee will see that the individual has been hired.



Transfer New Hire to Employee

When an applicant is hired, they will need to have a record in the Employee Master record. Instead of creating an entirely new record for the individual, you can use the **Transfer New Hire to Employee** window to bring over the details from the Applicant Master table.



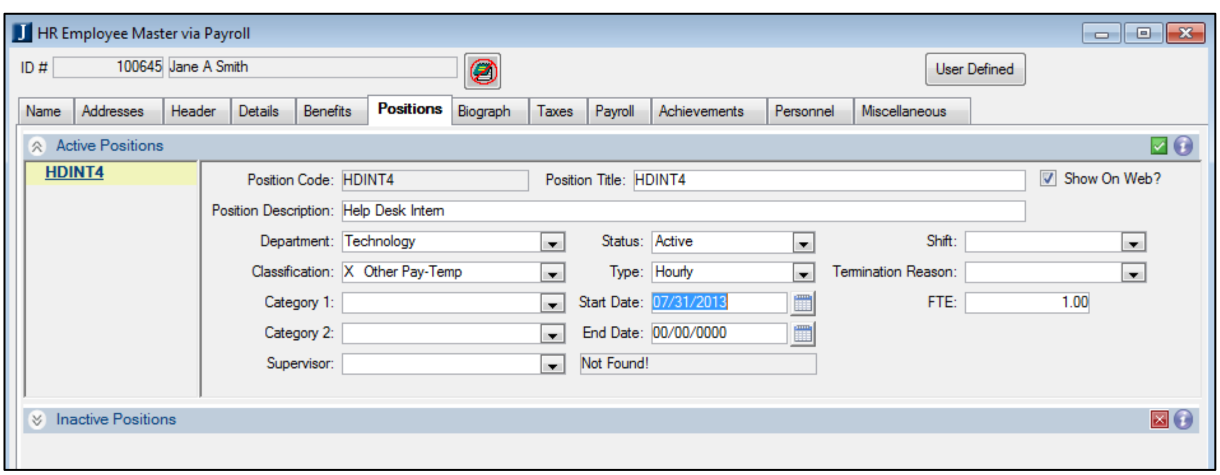
When an Application Status is changed to ***Accepted*** on an applicant's record, their name will automatically appear on the Transfer New-Hire to Employee window.

1. Highlight the new employees you want to transfer and click ***Process***
2. The Process button creates as much information as it can on the **Employee Master** window

This process will move your new employees to the Employee Master table.

When the new employees appear in the Employee Master, a record will automatically appear in the table without you needing to manually enter the basics of the employee's information.

3. Enter a start date, and finish adding any details needed



Chapter 7. Running Reports

This chapter will review some of the reports available in the Payroll and Personnel modules.

On many of the report windows, you will see a Customize button. If you have InfoMaker, you can click the Customize button to determine what information appears in the report and design the report to format the page layout and content.

Objectives

At the end of this chapter, you will be able to:

- Identify and Run Payroll and Personnel Reports
- Work with Regulatory Reporting
- Run Applicant Tracking Reports

Payroll Reports

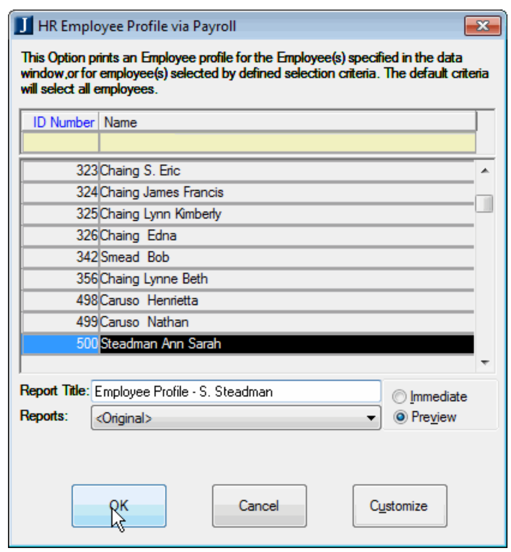
There are several reports available to you in the Payroll module; some may be required for the Payroll process, while others will be helpful for your own records.

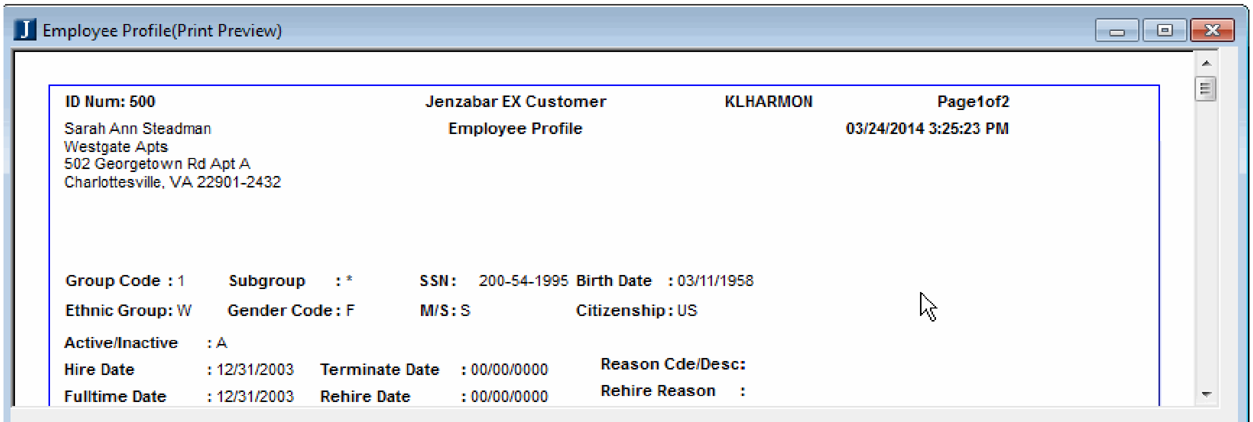
Employee Profile

This payroll report will provide you will all available information for the employee(s) selected.

From this report, you will be able to see all information from all tabs on the **HR Employee Master via Payroll** window.

This is a good way to view all of a specific employee’s benefits and positions.





Other Payroll Reports

Federal Wage/ Tax Reports	This report will allow you to print the Federal Earnings Proof Report or the Federal Unemployment Tax Proof Report for a month, quarter, or year period.
State Wage/ Tax Reports	From this report, you can print either the State Earnings Proof Report or the State Unemployment Tax Proof Report for a month, quarter, or year period.
State Reporting Media	This report allows you to generate a reporting file and save it to a Magnetic Media file that you can send to your state or local tax authority.
Local Wage/ Tax Reports	Use this report to print either the default Local Wage/Tax Report or the PA Municipality Report for a month, quarter, or year period.
W-2 Controls	Use this window to enter your school's W-2 information. There are three sections on this window: ▪ Transmitter: contains the name and location of the organization transmitting the information ▪ File Return: contains the name and location where the file was created ▪ W2 Form Name Address: contains the employer's name, address and ZIP code as it is printed on the W-2s
Generate W-2s	From this window, you will print W-2 forms or create media formats to send to the Federal Government.

Personnel Reports

There are several reports available to you in the Personnel module; these reports will be helpful as you maintain your employee records.

Regulatory Reporting

In Personnel, the regulatory reporting feature will allow you to can generate the following federally mandated reports for submission to the Department of Education:

- Integrated Postsecondary Education Data System (IPEDS) Report
- Equal Employment Opportunity Commission (EEOC) Report
- Colleges & University Personnel Association (CUPA) Faculty Salary Report
- Colleges & University Personnel Association (CUPA) Administrative Report
- Colleges & University Personnel Association (CUPA) Mid-Level Report

Prior to generating these reports, you can create employee snapshots to evaluate employee information and determine if any information is missing or inaccurate. An employee snapshot will allow you to capture and view employee information at a specific point in time for reporting purposes. The snapshots contain basic employee information such as name, address, position information (including current salary) and can be used to:

- Evaluate employee information for accuracy
- Simplify the reporting process by collecting data for a specified historic period
- Filter employee records by IPEDS reporting requirements

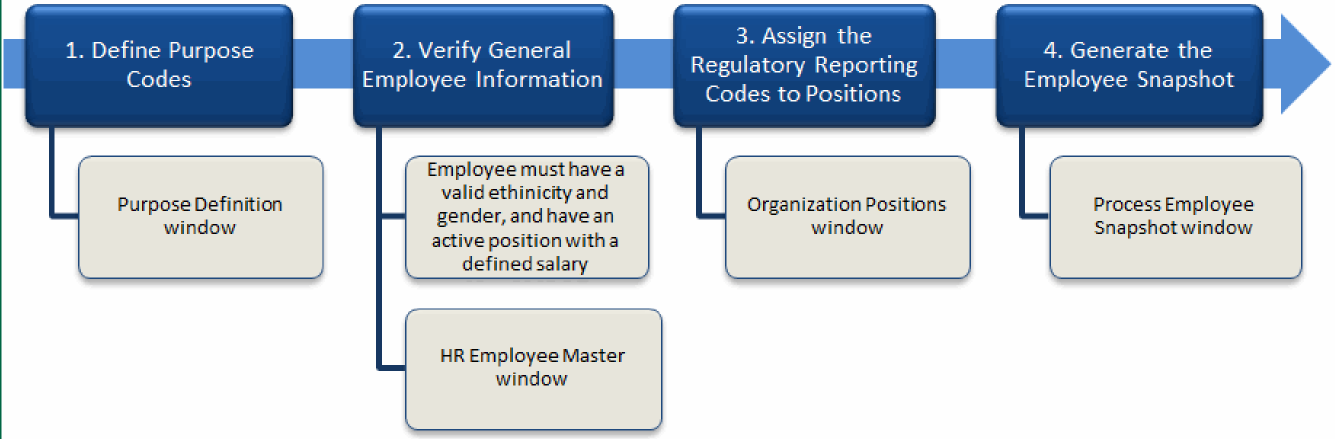
There are some general snapshot criteria that you will need to include for all employee snapshots:

- Purpose Type: describes the purpose and is used to create the Purpose Code (e.g., HR IPEDS)
- Purpose Code: defines why the information is being collected for the snapshot (e.g., 2013 IPEDS)
- Employee with the following:
  - Biographical master data (i.e., valid ethnicity and gender)
  - A primary or active position with defined salary information
  - Position start and salary review dates

If you are generating a snapshot with a specific regulatory reporting focus, you will need additional criteria beyond the general snapshot criteria:

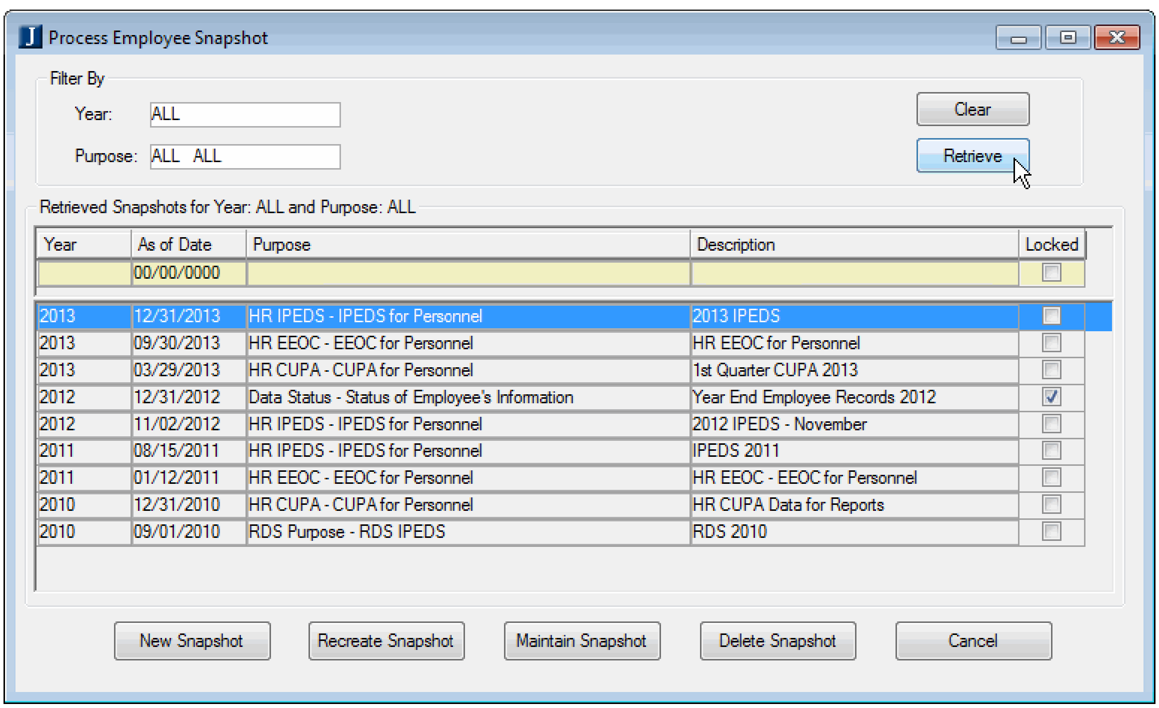
IPEDS	CUPA	EEOC
• IPEDS occupational activity, staff type, and academic rank must be assigned to the employee's position on the Organization Positions window	• CUPA, CIP codes and FLSA type must be assigned to the employee's position on the Organization Positions window	• EEOC category must be assigned to the employee's position on the Organization Positions window

To generate an employee snapshot, you will need to follow four steps:



Process Employee Snapshot

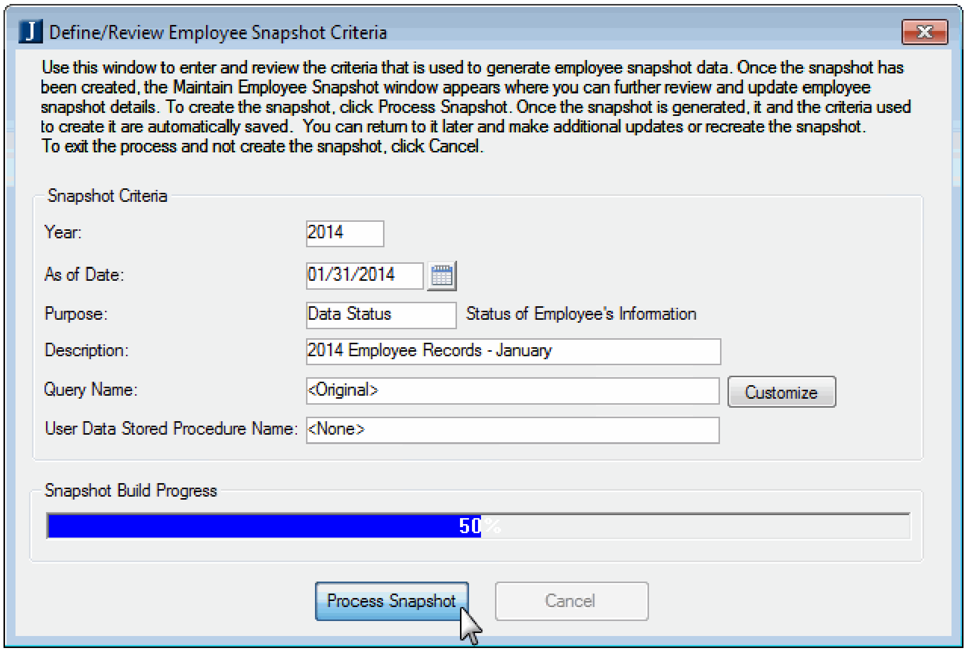
From this window, you can create, recreate, maintain, and delete snapshots. At the top of the window you can retrieve existing snapshots by selecting the year and purpose, then view your results in the bottom half of the window.



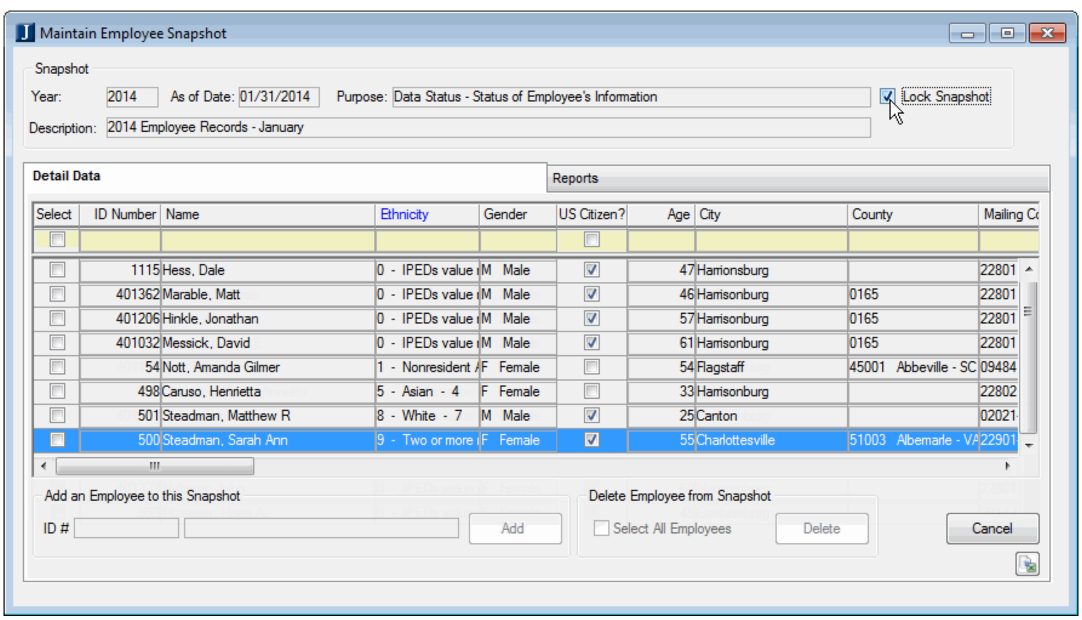
Year	As of Date	Purpose	Description	Locked
	00/00/0000			☐
2013	12/31/2013	HR IPEDS - IPEDS for Personnel	2013 IPEDS	☐
2013	09/30/2013	HR EEOC - EEOC for Personnel	HR EEOC for Personnel	☐
2013	03/29/2013	HR CUPA - CUPA for Personnel	1st Quarter CUPA 2013	☐
2012	12/31/2012	Data Status - Status of Employee's Information	Year End Employee Records 2012	☑
2012	11/02/2012	HR IPEDS - IPEDS for Personnel	2012 IPEDS - November	☐
2011	08/15/2011	HR IPEDS - IPEDS for Personnel	IPEDS 2011	☐
2011	01/12/2011	HR EEOC - EEOC for Personnel	HR EEOC - EEOC for Personnel	☐
2010	12/31/2010	HR CUPA - CUPA for Personnel	HR CUPA Data for Reports	☐
2010	09/01/2010	RDS Purpose - RDS IPEDS	RDS 2010	☐

You can lock the snapshots to prevent anyone else from editing or deleting the snapshot by selecting the Locked checkbox.

When you create a new snapshot, the **Define/Review Employee Snapshot Criteria** window will appear. You will enter the criteria details that will be used to generate the snapshot.

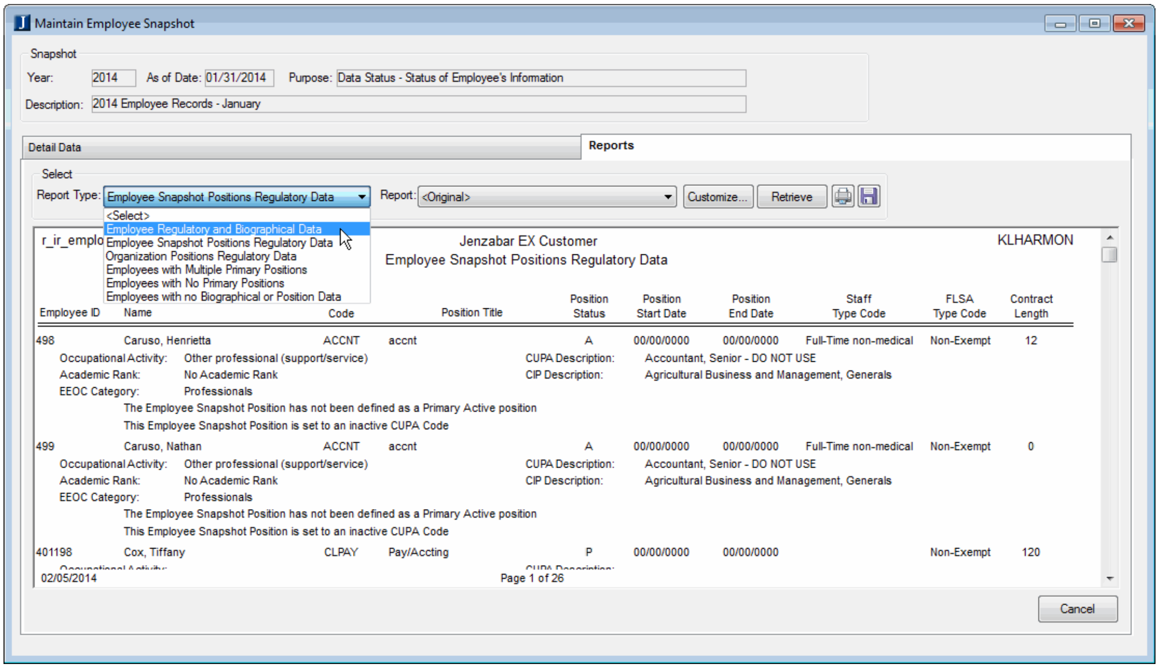


Once the snapshot is processed, the **Maintain Employee Snapshot** window will appear. From this window, you can further review and update employee snapshot details and view/print reports.



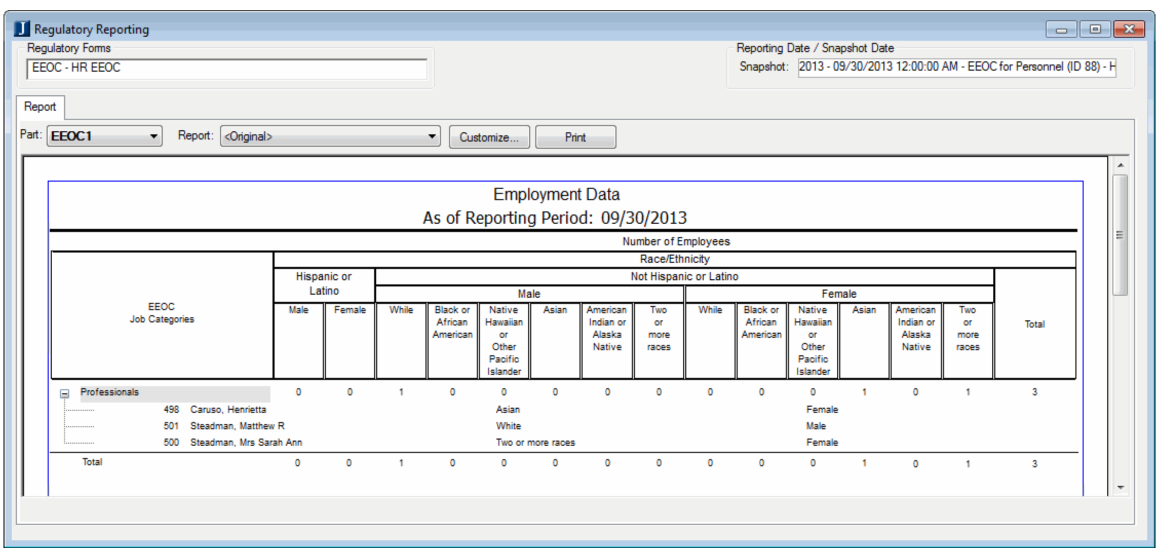
When you update employee snapshot information, only the snapshot is modified. For example, if you update an employee's Ethnicity, the ethnicity is not updated in the employee's biographical data in the Employee Master/Data tables.

From the **Maintain Employee Snapshot** window, you can select the ***Reports*** tab to view more information about the snapshot. These six reports will take the data from your snapshot and present the information in a more user friendly way. You can customize these reports.



Regulatory Reporting

From the **Regulatory Reporting** window, you will choose one of the Regulatory Forms (IPEDS, EEOC, or CUPA) and then select one of your snapshots. The report will pull information and breakdown the content to types of employees and various important details.



Prior to generating these reports, you will need to create employee snapshots to evaluate employee information and determine if any information is missing or inaccurate.

Other Personnel Reports

Performance\Salary Reviews	This reporting option will print a listing of upcoming employee reviews (salary or performance).
Staff Directory	This window will allow you to generate a list of all staff, and can be run to show a specific employee, all employees, or employees belonging to a group/subgroup. *In order for employees to appear in the Staff Directory report, the Include Staff Directory checkbox must be selected on the Miscellaneous tab of the HR Employee Master window.*
Exit Interview	This option will generate and print an exit interview form for employees who have been inactivated due to termination or resignation.
Employee List by Job	This report will list all the positions and employees who are in a select job position. You can select a specific job code to search, or you can generate a list of all positions and employees by not selecting search criteria.
Salary Statistics	Use this report to generate information on pay amounts and the number of employees in a specific job code.

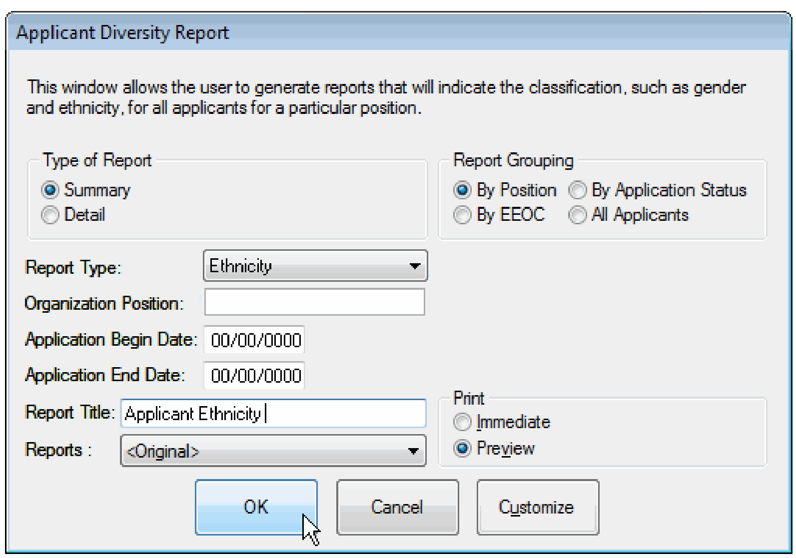
Applicant Tracking Reports

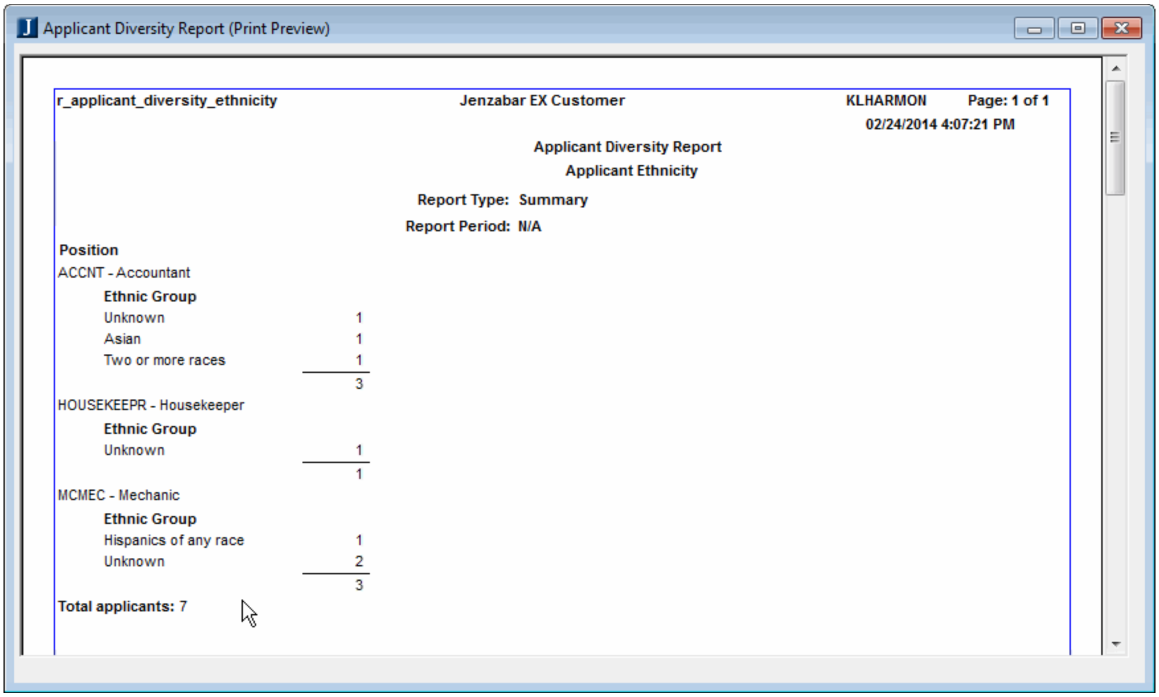
When working with CRM Staff, there are several reports you can run to help you through the Applicant Tracking process.

Applicant Diversity Report

You can generate reports that indicate classifications such as gender and ethnicity for all applicants for a particular position.

If you do not specify an Organization Position you will get results for all active positions.





Other Application Tracking Reports

Applicants by Position List	Use this report to generate a list of all applicants for a particular position.
Position Interviewees	You can generate a report that lists interviewees for a specific position or interviewees for all positions.