Microsoft Dynamics® GP

Advanced Human Resources

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CHAPTER 1: FEATURES AND REQUIREMENTS

Objectives

The objectives are:

- Understand the features, requirements and multi-user access criteria for Benefit Lifecycle Manager within Advanced Human Resources.
- Understand the features and requirements for the Certification, License and Training Manager component of Advanced Human Resources.
- Understand the features available through the Employee Health and Wellness component of Advanced Human Resources.

Introduction

Microsoft Dynamics® GP Advanced Human Resources includes three components: Benefit Lifecycle Manager; Certification, License and Training Manager; and Employee Health and Wellness.

Benefit Lifecycle Manager integrates with the Microsoft Dynamics GP Payroll module. It is designed to create Human Resources, Payroll Benefit and Payroll Deduction setup records that are not immediately effective. At the appropriate time, the records can be activated and previous setup records are tracked in history.

Certification, License and Training Manager integrates with the Microsoft Dynamics GP Human Resources module. Certification, License and Training Manager creates the link between the skills, training and certifications as well as provides a means to track employee certifications, licensing and training. It also enables the tracking of certifications or license to the extent of reporting on expiration, renewal periods and whether the certifications or licenses are required. You may query on required certifications, licenses, training and dates of expiration. In addition, a query can be created on a specific list of employees with a particular certification, license or training.

Employee Health and Wellness Manager integrates with the Microsoft Dynamics GP Human Resources module. The purpose of the Employee Health and Wellness Manager is to provide features for tracking all immunizations, vaccinations and tests required for each employee. The results for each test can also be recorded. Since codes can be defined to meet the company needs, this solution allows for additions or changes as business or job requirements change. The Employee Health and Wellness Manager will enable the user to schedule follow-up vaccinations, immunizations and tests. Having all the data available will enable easy searches on who is past due or scheduled for a particular immunization, vaccination or test. The requirements per employee are more easily assigned and tracked by the utilization of health and wellness templates.

Benefit Lifecycle Manager

Benefit Lifecycle Manager is used to create Human Resources Benefit, Payroll Benefit and Payroll Deduction setup records that are not immediately effective when creating employee level records or running payroll in Microsoft Dynamics GP. Benefit Lifecycle Manager then enables the user to activate the Future Effective setup records at the appropriate time, while tracking the past setup records in history.

By creating a Future Effective date to the record, this information can also be extended to the Benefit Self Service product on Business Portal.

Benefit Lifecycle Manager integrates with the Microsoft Dynamics GP Payroll module. When creating Human Resources Benefit, Payroll Benefit or Payroll Deduction records, the user can easily create or modify the Future Effective record as well.

Features

The features and capabilities of Benefit Lifecycle Manager include:

- Create Human Resources Setup Future Effective records for:
  - Miscellaneous Benefit
  - Health Insurance
  - Life Insurance
  - Retirement Plans
- Create corresponding Payroll Setup Future Effective records for:
  - Benefit
  - Deduction
- Activate Future Effective Setup records
- Track History of previous Setup records
- Make Pending Changes available to Benefit Self Service for informational and enrollment purposes.

NOTE: *This product is required for use with Benefit Self Service to activate any Pending Changes options in Business Portal.*

Release Requirements

Certain features and the use of this product must meet the following setup requirements to ensure proper functionality. Failure to use the Benefit Lifecycle Manager product as specified here will not currently be supported.

- Changes must be made from the Human Resources menu and rolled down to Payroll. There is **NO** reconciling functionality for future effective records.
- If creating a Future Effective Benefit, Payroll Deduction or Payroll Benefit record, the core record for that Benefit Code must exist before attempting to create the Future Effective record.
- Each individual must have the Payroll View for Human Resources option selected. To enable this option open the User Setup window, click the **Administration** series button, click **System** on the Setup content pane and then click **User**. Enter or select the **User ID**. Select the **Payroll View for Human Resources** checkbox. Click **Save**.
- Grant Security Access using the Security Setup window to grant individual security settings for each company.

Multi-User Access

Additional checks have been added to restrict access to Benefit Codes and Future Effective Benefit Codes when Benefit Lifecycle Manager is being used to ensure that benefit codes are modified correctly. The restrictions added include the following scenarios and if one of these scenarios is encountered, the system prompts with “This code is open by another user. Please try again later.”

Multi User Access Denied Scenarios:

- If the benefit code is opened in the Future Effective mode in the Human Resources Benefit Setup, Payroll Benefit Setup or Payroll Deduction Setup window, no other employee is able to open that benefit code in any of the three areas at the core setup level.
- If more than one employee currently has the benefit code open in the Human Resources Benefit Setup, Payroll Benefit Setup or Payroll Deduction Setup window and there is an attempt to create a new or display the existing Future Effective record in any of the three areas for that benefit code.

When the Human Resources to Payroll Integration is happening for a Future Effective record, if another employee would open that benefit code in one of the subsequent windows before the Human Resources to Payroll Integration gets to that level, when the Human Resources to Payroll Integration hits that level, the integration is stopped.

Certification, License and Training Manager

The Certification, License and Training Manager tracks all Certifications, Licensing and Training requirements. This product completes certain areas and fills additional areas that core Microsoft Dynamics GP skills and certification tracking does not currently handle.

Certification, License and Training Manager integrates with Microsoft Dynamics GP Human Resources. The Certification, License and Training Manager will create the link between the skills, training and certifications as well as provide a means to track employee certifications, licensing and training. It will also enable the tracking of certifications or licenses to the extent of reporting on expiration, renewal periods and whether the certifications or licenses are required. You may query on required certifications, licenses, training and dates of expiration. In addition, you may query on a specific list of employees with a particular certification, license or training.

Features

The features and capabilities of Certification, License and Training Manager include:

- Enter unlimited Certifications
- Certifications tracking for employees
- Enter unlimited Licenses
- License tracking for employees
- Enter unlimited Training
- Training tracking for employees
- Inquire for an employee on Certifications, Licenses and Training
- Set and View Requirements per Department and Position combinations for Certification, License and Training
- View Employee Percent Current per Department and Position combinations based on Worked or Home department/positions for Certification, License and Training
- SmartList Builder reporting options

Release Requirements

Certain features and the use of this product must meet the following setup requirements to ensure proper functionality. Failure to use the Certification, License and Training Manager product as specified here will not currently be supported.

To Grant Security Access use the Security Setup window to grant individual security settings for each company.

Certification Feature

The Certification feature of the Certification, License and Training Manager allows the user to enter Certification information specific to the company needs as well as track employee level Certification information as required within the industry or business. The Certification feature is easy to use and provides inquiry options to view the information employees are tracking more easily.

When a record for a Certification is entered where an expiration date is an attribute of that Certification whether the date is known at the time of entry or later, the expiration date will always be a future date to expire in relationship to the current record, i.e. my current Certification will expire at a future date. When the Certification is renewed or completed, the user can pull up the record for the Certification and enter the current renewal/completed date, the future expiration date and select Save. When it is the first year of a Certification, then the Original Issue Date = Date Renewed/Completed.

License Feature

The License feature of the Certification, License and Training Manager allows the user to enter License information specific to the company needs as well as track employee level License information as required within the industry or business. The License feature is easy to use and provides inquiry options to view the information an employee is tracking.

When a record for a License is entered where an expiration date is an attribute of that License whether the date is known at the time of entry or later, the expiration date will always be a future date to expire in relationship to the current record. When the License is renewed or completed, you should pull up the record for the License and enter the current renewal/completed date and the future expiration date and select Save. When it is the first year of a License, then the Original Issue Date = Date Renewed/Completed.

Training Feature

The Training feature of the Certification, License and Training Manager allows the user to enter Training information such as Courses and Classes specific to the company needs as well as track employee level Training information as required within the industry or business. The Training feature is easy to use and provides inquiry options to view the information the employee is tracking more easily.

When a record for the Training is entered where an expiration date is an attribute of that Training, the expiration date will always be a future in relationship to the current record. When the Training is renewed / completed, you will pull up the record for the Training and enter the current renewal / completed date and the future expiration date and select

Save. When it is the first year of a Training, then the Original Issue Date = Date Renewed/Completed.

Employee Health and Wellness

Within Microsoft Dynamics GP Human Resources, you can track injury and illness information for each employee and generate the necessary OSHA reports. Employee Health and Wellness Manager enables organizations to completely track all additional employee immunizations, vaccinations and test requirements that are related to the injury and illness cases, but not included on OSHA reports.

Employee Health and Wellness Manager is an enhancement that integrates with Microsoft Dynamics GP Human Resources. The purpose of Employee Health and Wellness Manager is to provide features for tracking all immunizations, vaccinations and tests required for each employee. The results for each test can also be recorded. Since the codes can be defined, the product allows for additions or changes as business or job requirements change.

Employee Health and Wellness Manager enables the user to schedule follow-up vaccinations, immunizations and tests. Having all the data available will enable easy searches on who is past due or scheduled for a particular period for a particular immunization, vaccination or test. The requirements per employee are more easily assigned and tracked by the utilization of health and wellness templates.

Features

The features and capabilities of Employee Health and Wellness Manager include:

- Create Categories and associated Codes specific to the business needs
- Create unlimited Results types that can be associated with the Health and Wellness codes
- Create Health and Wellness codes for use in Health and Wellness and related to Injury and Illness tracking
- Assignment of multiple codes to employees via customized Templates
- Assignment of Health and Wellness codes to employees for informational and tracking purposes
- Additional information for tracking with Illness and Injury Cases, including Source tracking
- SmartList Builder reporting options

Sensitive information related to the Health and Wellness of Employees and Sources is tracked using this product. Compliance with HIPPA regulations as it pertains to this data is the responsibility of the user.

Summary

The Advanced Human Resources module for Microsoft Dynamics GP is comprised of three components:

1. Benefit Life Cycle Manager
2. Certification, License and Training Manager and
3. Employee Health and Wellness

Key points to remember from this chapter:

- Benefit Life Cycle Manager provides the ability to assign future effective dates for Miscellaneous Benefits, Health Insurance, Life Insurance and Retirement Plans
- The user can enter an unlimited number of certifications, licenses and training data for employees.
- Employee Health and Wellness allows the organization to track various health-related categories, codes and tests, as well as the results of each.

CHAPTER 2: ADVANCED HUMAN RESOURCES SETUP

Objectives

The objectives are:

- Use Security Task Setup window to set security tasks for Advanced Human Resources modules.
- User Security Roles Setup window to set security roles for Advanced Human Resources modules.
- Create a future effective record for a benefit plan such as health insurance, life insurance or a retirement plan.
- Learn to complete the various setup windows required to use Certification, License and Training Manager.
- Learn to set up various Health and Wellness windows to allow the organization to track health related information for employees.

Introduction

Microsoft Dynamics GP Advanced Human Resources components (Benefit Lifecycle Manager; Certification, License and Training Manager and Employee Health and Wellness) require various setup tasks to be completed prior to connecting them with the employee records.

Planning what will be used within the various set up windows is critical. As categories, codes, types and templates are developed; keep in mind what information is required for outputs in the form of inquiries and reports.

Security Setup for Advanced Human Resources

Setting up a Security Task

Use the Security Task Setup window to select a default security task or modify the default security task. To open this window, click the **Administration** series button, click **System** on the Setup content pane, and then click **Security Tasks**.

Enter a **Task ID**.

Select **HRM Solutions Series** for the **Product**.

- Select **Windows** for the **Type**
- Select **3rd Party** for the **Series**

- Select the following from the **Access List**:
  - **Benefit Options**
  - **Effective Date**
  - **Employee Beneficiaries**
  - **Employee Benefit Dependents**
  - **Employee Dependents**
  - **Future Effective Activation**
  - **Plan Status Reason Lookup**
  - **Plan Status Reasons**

Change the **Type** to **Reports**

- Select the following from the **Access List**
  - **Future Effective Activation Reports**

Change the **Product** to **Certification Manager**.

- Select **Windows** for the **Type**.
- Select **3rd Party** for the **Series**.
- Select the following from the **Access List**:
  - **Certification Endorsement**
  - **Certification Entry**
  - **Certification History**
  - **Certification Setup**
  - **Certification, License and Training Required by Department and Position**
  - **Certification, License and Training Inquiry**
  - **Certifications**
  - **Class Point**
  - **Course and Class Employee Entry**
  - **Employee Certification Endorsements**
  - **Employee License Endorsements**
  - **Employee Training**
  - **Endorsement Setup**
  - **Instructor Lookup**
  - **Instructor Setup**
  - **Issued By Lookup**
  - **Issued by Setup**
  - **License Endorsements**

- **License Entry**
- **License History**
- **License Type Setup**
- **License Types**
- **Percent Current Inquiry**
- **Training Course Definition Additional Information**
- **Training Courses**
- **Training History**

Change the **Type** to **Reports**

- Select the following from the **Access List**
  - **CLM Certification History**
  - **CLM Certification License and Training Inquiry Report**
  - **CLM Certification Setup**
  - **CLM Certifications**
  - **CLM Course Setup**
  - **CLM Instructor Setup**
  - **CLM Issued By Setup**
  - **CLM License History**
  - **CLM License Setup**
  - **CLM Licenses**
  - **CLM Percent Current**
  - **CLM Percent Current Totals**
  - **CLM Required Report**
  - **CLM Training History**

Change the **Product** to **Employee Health and Wellness**.

- Select **Windows** for the **Type**
- Select **3rd Party** for the **Series**
- Select the following from the **Access List**:
  - **Assign Templates**
  - **Category Lookup**
  - **Category Setup**
  - **Health and Wellness Code Lookup**
  - **Health and Wellness Code Setup**

  - **Health and Wellness Entry**
  - **Health and Wellness History**
  - **Health and Wellness Template Lookup**
  - **Health and Wellness Template Setup**
  - **Injury and Illness Details**
  - **Result Lookup**
  - **Result Setup**
  - **Source Lookup**
  - **Source Setup**

Change the **Type** to **Reports**

- Select the following from the **Access List**
  - **EHW Category Setup**
  - **EHW Code Setup**
  - **EHW Health And Wellness Entry Report**
  - **EHW Health and Wellness History Report**
  - **EHW Injury And Illness Report**
  - **EHW Result Setup**
  - **EHW Source Setup**
  - **EHW Template Setup**

Click **Save** to save the selections and close the window.

Setting up Alternate/Modified Forms and Reports Security

Use the Alternate/Modified Forms and Reports window to set access to the alternate/modified forms for Advanced Human Resources. To open this window, click the **Administration** series button, click **System** on the Setup content pane and then click **Alternate/Modified Forms and Reports**.

Select the appropriate **ID**.

Select **HRM Solutions Series** for the **Product**.

Select **Windows** for the **Type**.

Expand the Payroll folder and select the HRM Solution Series radio button for each of the following Alternate Core Dynamics GP windows.

- Benefit Setup
- Deduction Setup
- Employee Deduction Maintenance

Click **Save** to save the selections and close the window.

Setting up Security Roles

Use the Security Role Setup window to select a default security role for Advanced Human Resources or modify the default security role. To open this window, click the **Administration** series button, click **System** on the Setup content pane, and then click **Security Roles**.

Benefit Lifecycle Manager - Setup

Benefit Lifecycle Manager allows Future Effective Records to be created for any of the benefit plans. The Future Effective options are accessed the same way in the Human Resources Benefit Setup and in the Payroll Deduction and Benefit Setup windows.

To access a Future Effective Record window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Benefits and Deductions**, click **Miscellaneous Benefits**, **Health Insurance**, **Life Insurance** or **Retirement Plans**, enter or select a **Code**, click the **Benefits icon** and then click **Future Effective**.

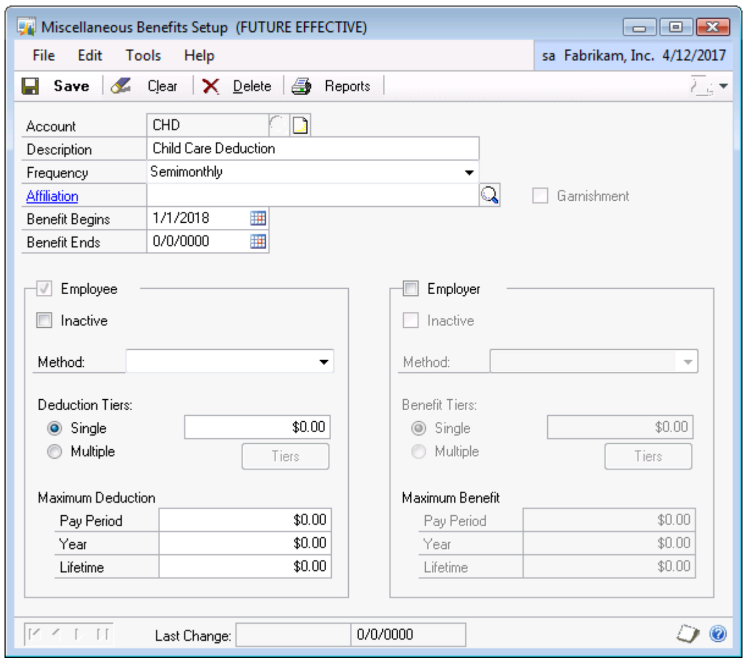


FIGURE 2.1 BENEFIT SETUP (FUTURE EFFECTIVE) WINDOW

One of two options will be available on the drop down menu:

- **Future Effective (New)** – this option will be available if no future effective record currently exists for the benefit/deduction record currently open.
- **Future Effective (Existing 00/00/0000)** – this option will be available if a future effective record currently exists for the benefit/deduction record currently open. The 00/00/0000 represents the future effective date (or Benefit Begin Date) assigned to this future effective record.

Setting up a Future Effective Record

To create a new Future Effective record for the benefit or deduction record currently open, click the **Benefits icon** and then click **Future Effective (New)** option. The system prompts, “Create a Future Effective record using the current information?”

- Select **Create** to open the Future Effective window with the current core record values defaulted in the fields.
- Select **Cancel** to return to the current core record.

For Human Resources the system prompts to enter the Future Effective Date, enter a date greater than the current user date and select OK.

- Enter the future information for this benefit. The window name will be followed by “(FUTURE EFFECTIVE)”.
- Select **Save.** They system prompts, “Save future effective record?”
    - Select **Save** to save the current Future Effective record. Refer to section “Human Resources and Payroll Integration” for more information on subsequent messages that appear during the save process.
    - Select **Cancel** to return to the current future effective record.

Roll down from HR/Payroll Setup level to existing Employee level HR/Payroll records exists so beware of the selection to this message when saving Future Effective records. Since the roll down feature is for employee records, answer this question **No** as Future Effective functionality is for Benefit Setup windows only.

- Select **Clear** to clear the record form the window and set the window back to the core record.
- Select **Delete** and the system prompts, “Delete this Future Effective record?”
    - Select **Delete** to delete the displayed Future Effective record. Then there are checks to determine if there are corresponding Future Effective records in Payroll, if there are then the system prompts a message asking if the corresponding Future Effective records from Payroll should be deleted. If the answer is yes, then select Yes, and then all Human Resources and Payroll Future Effective records are deleted for that code. If the answer is No and No is selected, then only the Human Resources Future Effective records are deleted for that code.
    - Select **Cancel** to return to the current Future Effective record.

- **Reports** are only available if the Future Effective record is open.

__NOTE:__ Future Effective amounts are not reported on the Reports generated from the Reports > Human Resources menu.

If a Future Effective record is created for a Human Resources code that does not exist in Payroll and corresponding is set up in Payroll, the system prompts, “The Payroll Benefit must exist before a Future Effective Record can be created.” Select OK.

__NOTE:__ When Future Effective records are created, you should not select to roll down to Payroll or Human Resources. This roll down functionality does not apply to the future effective records.

Editing and Viewing an Existing Future Effective Record

To open an existing Benefits and Deduction Setup window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Benefits and Deductions**, click **Miscellaneous Benefits**, **Health Insurance**, **Life Insurance** or **Retirements Plans**, click the **GoTo** menu and then click **Future Effective**.

The system prompts, “Display future effective record?”

- Select **Yes** to open the current Future Effective record in the Future Effective window. For Human Resources the system then prompts to verify the Future Effective Date, leave the date as entered or edit the date and select OK.
- Select **No** to return to the current core record.
- Select **Save** to save and the system prompts, “Save future effective record?”
  - Select **Save** to save the current Future Effective record.
  - Select **Cancel** to return to the current Future Effective record.

Roll down from HR/Payroll Setup level to existing Employee level HR/Payroll records exists so beware of the selection to this message when saving Future Effective records. Select **No**; Future Effective functionality is for the Benefit and Deduction Setup windows only.

- Select **Clear** to clear the record from the window and set the window back to the core record.
- Select **Delete** to delete the record, the system prompts “Delete this Future Effective record?”

  - Select **Delete** to delete the displayed Future Effective record. Then there would be checks if there were corresponding Future Effective records in Payroll, if so the system prompts with a message asking to delete corresponding Future Effective records from Payroll. If Yes is selected, then all Human Resources and Payroll Future Effective records are deleted for that code. If No is selected, then only the Human Resources Future Effective records are deleted for that code.
  - Select **Cancel** to return to the current future effective record.
- **Reports** are only available while a Future Effective record is open.

Saving in Payroll

When saving a future effective record in Payroll, the system prompts, “Save future effective record?”

- Select **Save** to save the current future effective record.
  - The system prompts, “The information for the Payroll deduction code is different than the Human Resources deduction code. Do you want to continue?”
- Selecting **Yes** prompts, “These changes must be saved in the Benefit Setup window to take effect across Human Resources with Integration to Payroll. When the Benefit Setup window opens, choose Save to save changes.” Click OK.
- Selecting **No** cancels the message and returns to the Future Effective record.
- Select **Cancel** to return to the current Future Effective record window.

Select **Save** to save this operation, the system prompts, “Save future effective record?”

- Select **Save** to save the current future effective record.
  - The system prompts, “The information for the Payroll deduction code is different than the Human Resources deduction code. Do you want to continue?”
- Select **Yes** or
- Select **No**
- Select **Cancel** to return to the current Future Effective record window.

Select **Clear** to clear the window and return to the core window.

Saving in Human Resources

Next, the system prompts, “Do you want to set up the corresponding codes in Payroll so the integration is complete?”

- Select **Yes** to open the Payroll Deduction window and default all values from the Human Resources Future Effective record. Once the record is saved in this window, the Payroll Benefit window opens and defaults to save as well.
- Select **No** to save the Future Effective record only in Human Resources and return to the core window.

If this operation should **NOT** be saved, click **Cancel**. It returns to the Future Effective record.

Click **OK** when prompted, “These changes must be saved in the Benefit Setup window to take effect across Human Resources with Integration to Payroll.” When the Benefit Setup window opens, select **Save** to save changes.

Employee Dependents Window

Within the Employee Dependents window data fields have been added to use to set up dependents associated with the employee. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee** and then click **Dependents**.

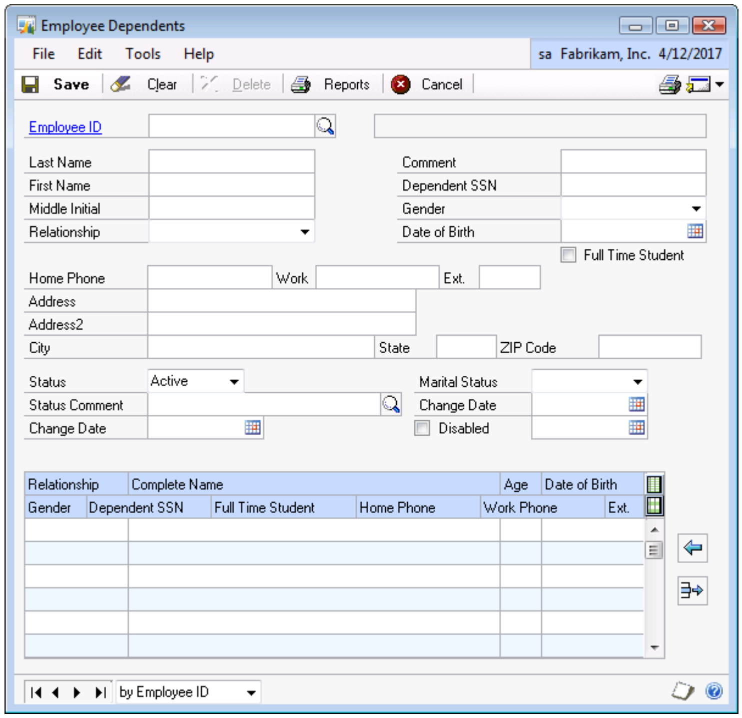


FIGURE 2.2 EMPLOYEE DEPENDENTS WINDOW

The additional data fields are:

- **Status** - select Active or Inactive
- **Status Comment** - these options are defined in the Plan Status Reason window
- **Change Date**
- **Marital Status** - select Married, Single or N/A
- **Change Date**
- **Disabled** checkbox
- **Disabled Date**

Employee Beneficiaries Window

Within the Employee Beneficiaries window additional data fields are available, to define beneficiaries associated with the employee and specific benefit plan. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee - Benefits**, select a **Benefit**, select an **Employee ID**, click the **Benefit** icon, and click **Beneficiary Definition**.

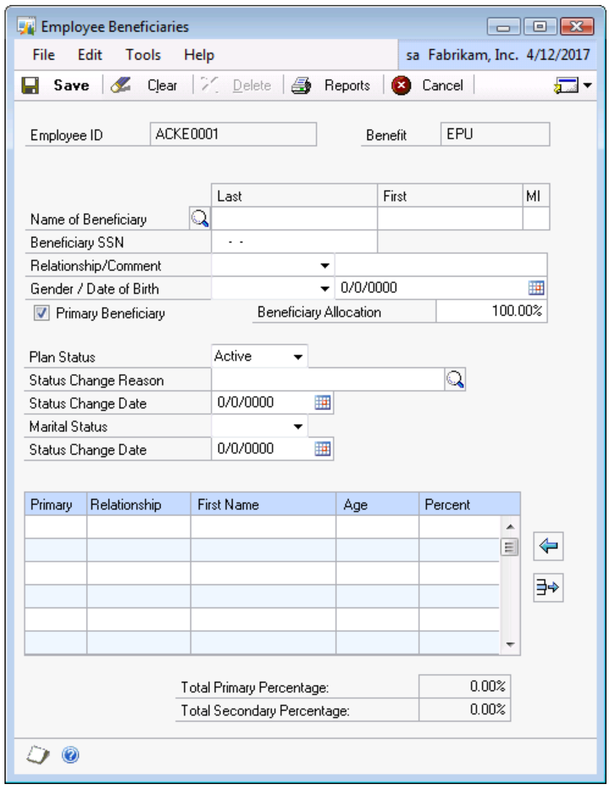


FIGURE 2.3 EMPLOYEE BENEFICIARIES WINDOW

The data fields are:

- **Plan Status** - select Active or Inactive
- **State Change Reason** - the lookup button allows information to be defaulted from existing Dependents.
- **Status Comment** - these options are defined in the Plan Status Reason window
- **Change Date**
- **Marital Status** - select Married, Single or N/A
- **Change Date**
- **Disabled** checkbox
- **Disabled Date**

Employee Benefit Dependents Window

The Employee Benefit Dependents window allows Human Resources to define the employee dependents associated with a specific employee benefit plan. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee - Benefits**, select a **Benefit**, select an **Employee ID**, select a **Benefit Code**, click the **Benefit** icon, and click **Dependents**.

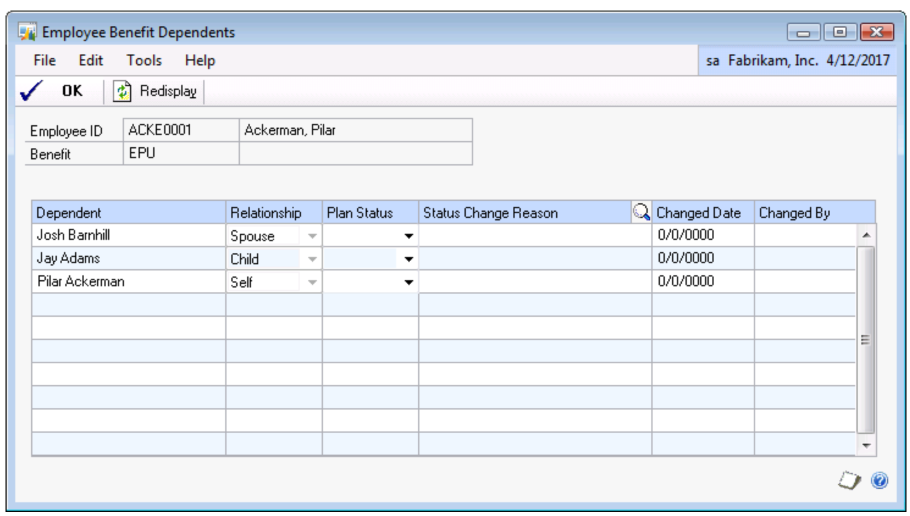


FIGURE 2.4 EMPLOYEE BENEFIT DEPENDENTS WINDOW

Complete the **Plan Status** and **Status Change Reason** fields as appropriate.

Plan Status Reasons Window

The Plan Status Reasons window allows Human Resources to define acceptable Reasons for why a particular dependent or beneficiary were activated or inactivated from a benefit plan. This information is necessary to provide to benefit carriers. To open the Plan Status Reasons window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane and then click **Plan Status Reasons**.

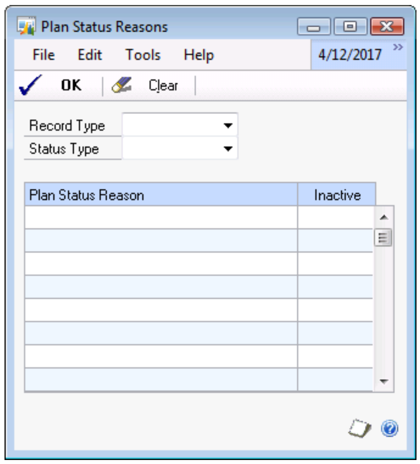


FIGURE 2.5 PLAN STATUS REASONS WINDOW

Select a **Record Type** and then select a **Status Type**.

Benefit Options Window

To open the Benefit Options window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, select a **Benefit** window, select a **Benefit Code**, click the **Benefits** icon and then click **Benefit Options**.

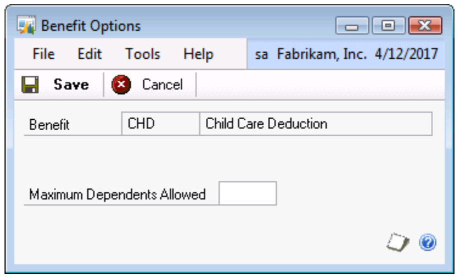


FIGURE 2.6 BENEFIT OPTIONS WINDOW

Each of the Benefit Setup windows (Miscellaneous Benefits, Health Insurance, Life Insurance and Retirement Plans) has the Benefit Options item added to the Benefits button. When Benefit Options is selected this will allow the user to define the maximum number of dependents allowed for the specified benefit.

NOTE: *A Benefit Setup record must be displayed within the window to open Benefit Options.*

This window allows the user to set the Maximum Dependents Allowed. The Maximum Dependents Allowed will be validated when enrollment changes are made to the benefit record.

By default, the number of dependents is set to zero which means unlimited if the Benefit Self Service module is not being used.

Certification, License and Training Manager Setup

There are several set up windows associated with Certification, License and Training Manager:

- Issued By Setup
- Instructor Setup
- Endorsement Setup
- Certification Setup
- License Type Setup

In addition, several other windows can be completed at this point in the process:

- Training Course Definition Additional Information window
- Class Points window
- Certification, License and Training Required by Dept and Position window

Issued By Setup Window

Use the Issued By Setup window to set up, assign an unlimited number of Issued By Agencies with description, contact and address information. An Issued By could be Agency or other organization. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Certifications, Licenses and Training** and then click **Issuers**.

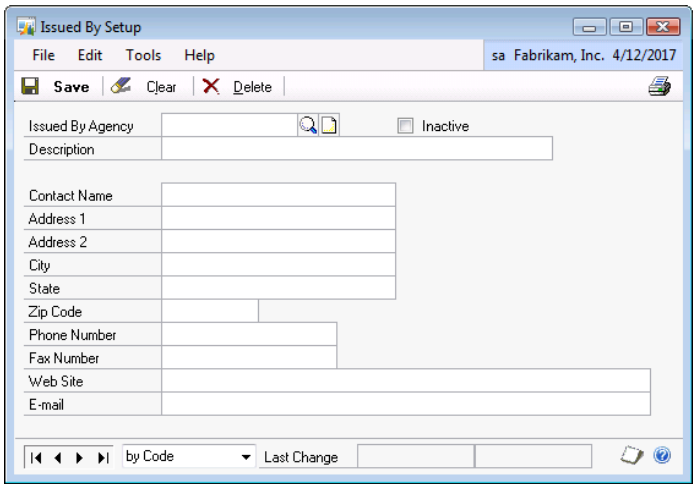


FIGURE 2.7 ISSUED BY SETUP WINDOW

Enter or select an **Issued By Agency**.

Enter the following information:

- **Description**
- **Contact Name**
- **Address 1**
- **Address 2**
- **City**
- **State**
- **Zip Code**
- **Phone Number**
- **Fax Number**
- **Web Site**
- **E-mail**

Select the **Inactive** checkbox to inactivate the current Issued By Agency code.

Instructor Setup Window

Use the Instructor Setup window to set up, assign unlimited number of Instructors with contact and address information. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Certifications, Licenses and Training** and then click **Instructors**.

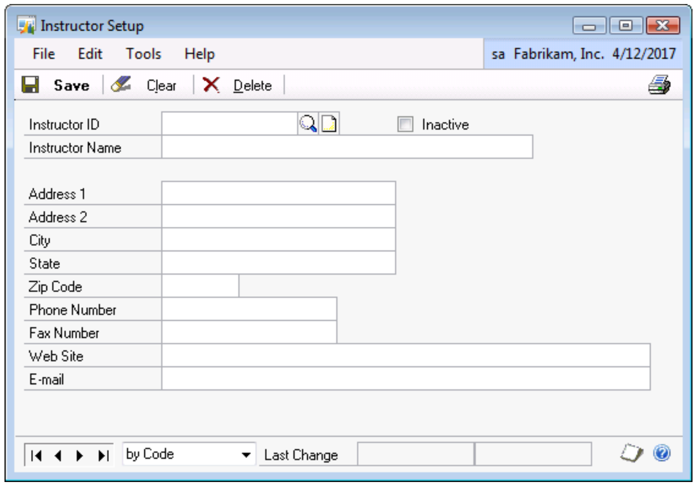


FIGURE 2.8 INSTRUCTOR SETUP WINDOW

Enter or select **Instructor ID**.

Enter the following information:

- **Instructor Name**
- **Address 1**
- **Address 2**
- **City**
- **State**
- **Zip Code**
- **Phone Number**
- **Fax Number**
- **Web Site**
- **E-mail**

Select the **Inactive** checkbox to inactivate the current instructor ID code.

Endorsement Setup Window

Use the Endorsement Setup window to define the Endorsements by Certification or License. To open this window, click the **HR and Payroll** series button, click **Human Resources o**n the Setup content pane, click **Certifications, Licenses and Training** and then click **Endorsements**.

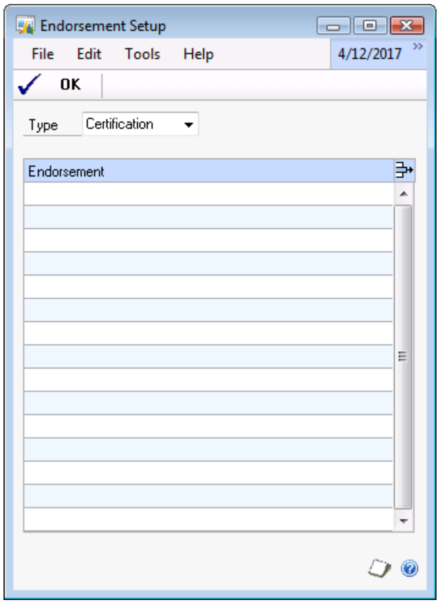


FIGURE 2.9 ENDORSEMENT SETUP WINDOW

Select the **Type**:

- Certification
- License

Enter the new **Endorsement** or edit the Endorsement for the selected Type.

Select **OK** to save the Endorsement Setup and close the window.

To delete a row, select the Endorsement and then select the delete row button to delete this Endorsement.

Certification Setup Window

Use the Certification Setup window to set up and assign unlimited number of Certifications with descriptions. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Certifications, Licenses and Training** and then click **Certifications**.

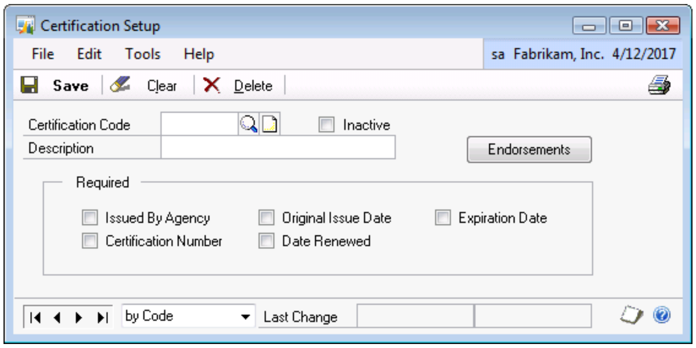


FIGURE 2.10 CERTIFICATION SETUP WINDOW

When entering a new Certification Code, enter a **Description** and select any **Required** options.

- **Issued By Agency**
- **Original Issue Date**
- **Expiration Date**
- **Certification Number**
- **Date Renewed**

Selecting any of the **Required** options affects the Employee Certification Entry window by forcing entry of a value in the field prior to saving the record.

Select the **Inactive** checkbox to inactivate the current Certification Code.

Certification Endorsements Window

Use the Certification Endorsements window to mark the appropriate Endorsement that was created during the Endorsement Setup. To open this window, click the **Endorsements** button on the Certification Setup window.

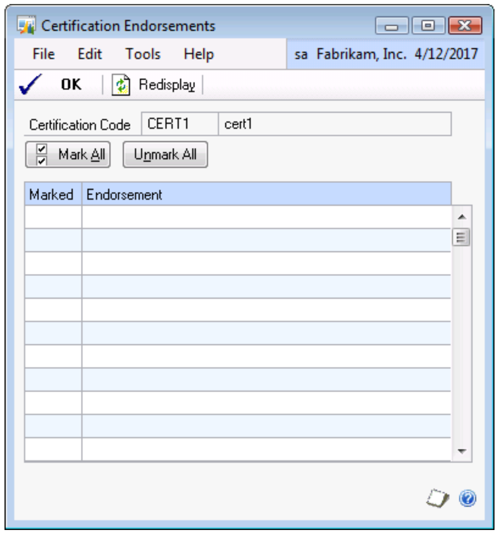


FIGURE 2.11 CERTIFICATION ENDORSEMENTS WINDOW

The **Marked** column indicates the Endorsements that are marked for the specific Certification Code. Use **Mark All** and **Unmark All** to mark or unmark all Endorsements at once.

Select **OK** to save the Endorsement Assignment and close the window.

License Type Setup Window

Use the License Type Setup window to set up and assign unlimited number of License Types with descriptions. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Certifications, Licenses and Training** and then click **License Types**.

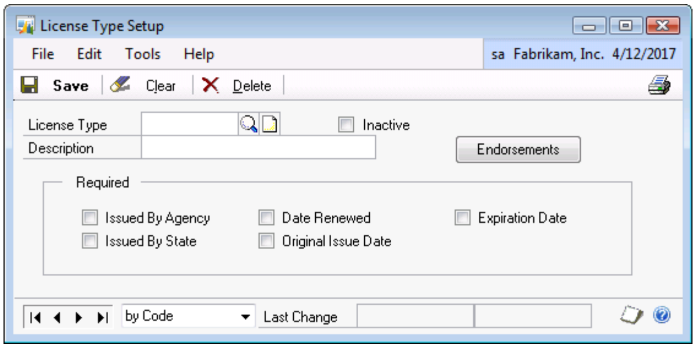


FIGURE 2.12 LICENSE TYPE SETUP WINDOW

Enter or select a **License Type**.

When entering a new License Type, complete the **Description**, select the appropriate **Required** options and assign **Endorsements**.

- **Issued By Agency**
- **Date Renewed**
- **Expiration Date**
- **Issued By State**
- **Original Issue Date**

Selecting any of the fields as **Required** affects the Employee License Entry window by forcing entry of a value in the field prior to saving the record.

Select the **Inactive** checkbox to inactivate the current Certification Code.

License Type Endorsements Window

Use the License Endorsements window to select the appropriate Endorsement that was created during the Endorsement Setup. To open this window, click the **Endorsements** button on the License Type Setup window.

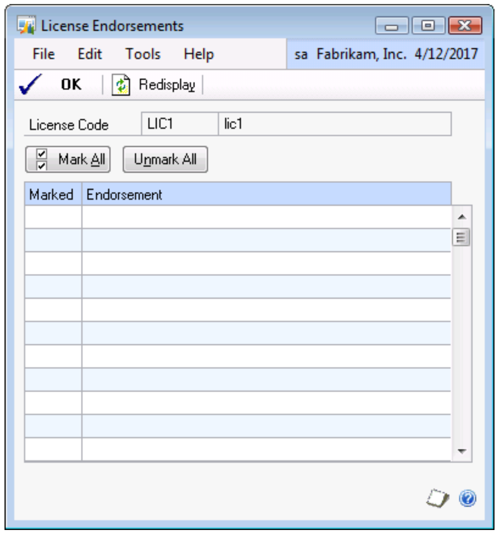


FIGURE 2.13 LICENSE ENDORSEMENTS WINDOW

The **Marked** column indicates the Endorsements that are marked for the specific License Code. Use **Mark All** and **Unmark All** to mark or unmark all Endorsements at once.

Select **OK** to save the Endorsement Assignment and close the window.

Training Course Definition Additional Information Window

Use the Training Course and Class Definition window to set up a training course. The Certification, License and Training Manager has extended the Course set up with additional fields on the new Training Course Definition Additional Information window. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Certifications, Licenses and Training** and then click **Training Additional Info**.

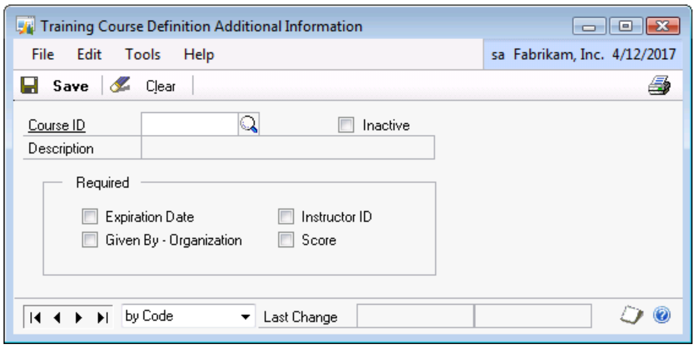


FIGURE 2.14 TRAINING COURSE DEFINITION ADDITIONAL INFORMATION WINDOW

Enter or select a **Course ID**. The **description** field displays from the Training Course and Class Definition window. Check the boxes for fields that are to be **Required** on the Employee Training window.

Select the **Inactive** checkbox to inactivate the current Course ID.

Class Points Window

Use the Class Points window to add points to the individual class combination. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Training**, select a **Course ID**, select a **Class**, click **Additional** from the menu and then click **Class Points**.

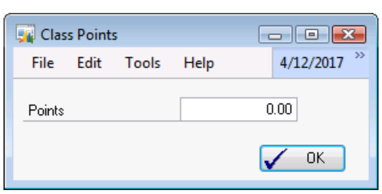


FIGURE 2.15 CLASS POINTS WINDOW

Enter a **Points** value for the selected class (ex: time length of class).

Select **OK** to save and close the Class Points window.

Certification, License and Training Required by Dept and Position Window

Use the Certification, License and Training Required by Department and Position window to assign to a specific Position and Department combination and any required certifications, licenses or training. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Certifications, Licenses and Training** and then click **Requirements**.

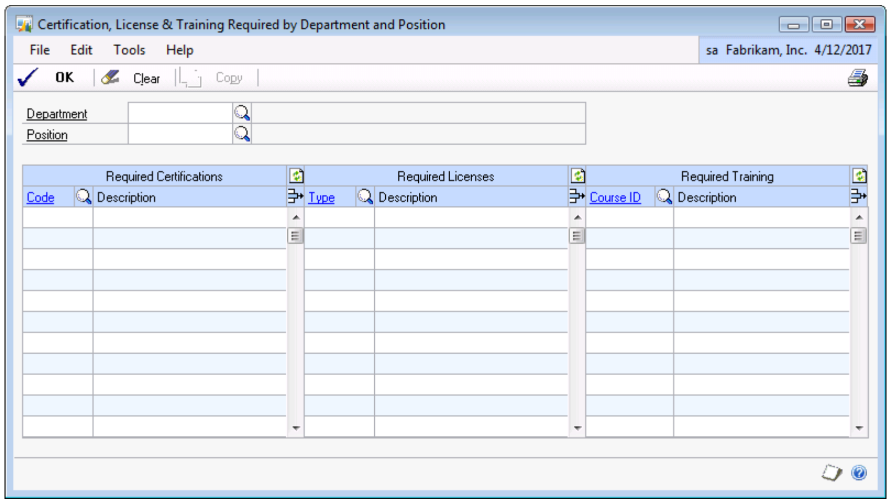


FIGURE 2.16 CERTIFICATION, LICENSE AND TRAINING REQUIRED BY DEPARTMENT AND POSITION WINDOW

Use this window to add, update or remove from a list any required certifications, licenses or training.

Enter or select a **Department** and **Position**.

Required Certifications section within the scrolling window allows the user to assign any Certification Codes that are required for the currently selected Department and Position. Enter or delete the Certification Codes as required. To delete the Certification Code, select the code and then select delete row button.

Required Licenses section within the scrolling window allows the user to assign any License Types that are required for the currently selected Department and Position. Enter or delete the License Types as required. To delete the License Type, select the type and then select delete row button.

Required Training section within the scrolling window allows the user to assign any Course IDs that are required for the currently selected Department and Position. Enter or delete the Course IDs as required. To delete the Course ID, select the course id and then select delete row button.

Once a Department and Position have been selected, the **Copy** button is enabled. Selecting Copy opens the Copy Requirements window and allows the user to copy all of the Required Certifications, Licenses and Training associated with the currently open Department/Position combination to another Department/Position combination.

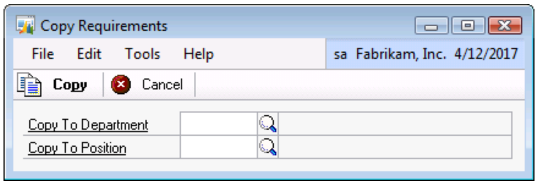


FIGURE 2.17 COPY REQUIREMENTS WINDOW

Enter or select the **Copy To Department** and **Copy To Position**. Select **Copy** to complete the copy process or select **Cancel** to cancel the copy process.

Employee Health and Wellness Manager - Setup

There are several set up windows associated with Employee Health and Wellness:

- Category Setup window
- Results Setup window
- Health and Wellness Code Setup window
- Health and Wellness Template Setup window
- Sources Setup window

Health and Wellness Code Setup Window

Use the Health and Wellness Code Setup window to set up and assign unlimited number of Codes with descriptions and be able to set the status of the code to Active or Inactive. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Health and Wellness** and then click **Codes**.

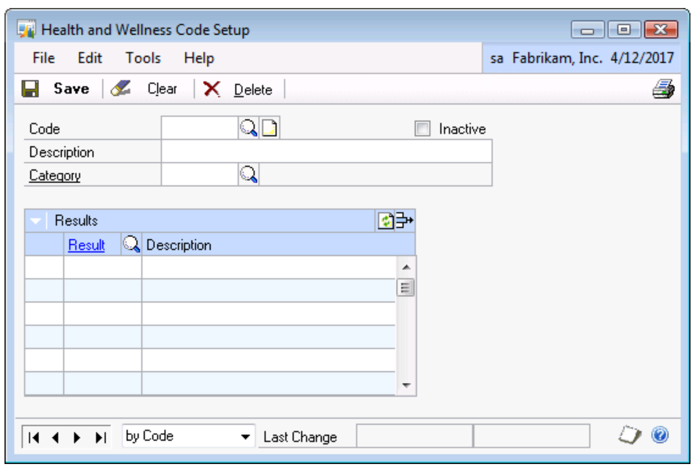


FIGURE 2.18 HEALTH AND WELLNESS CODE SETUP WINDOW

Examples of Health and Wellness Codes are Rubeola, Rubella, Booster, Hepatitis C, Pertussis Exposure, Laser Screening, Hearing Protection and Eye Exams.

For each Code the user will be able to set up results, such as Positive or Negative. These results will then be available as choices on the Employee Health and Wellness Entry window.

Enter or select a **Code**; enter or modify the **Description** and enter or select the **Category**.

The scrolling window allows the user to apply the Results that relate to the current Health and Wellness code.

- **Checkbox** will activate the Result
- Enter or select a **Result Code**
- The **Description** displays from the Result Setup window

Result Setup Window

Use the Result Setup window to set up and assign unlimited number of Result Codes with descriptions and be able to set the status of the code to Active or Inactive. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Health and Wellness** and then click **Results**.

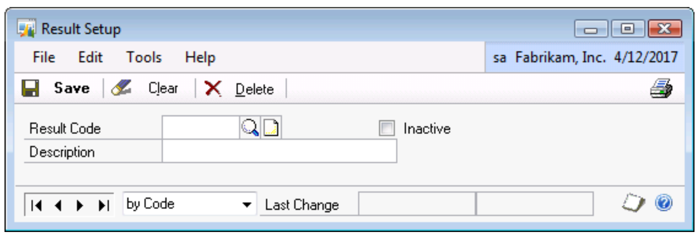


FIGURE 2.19 RESULT SETUP WINDOW

Enter or select a **Result Code**. Enter or modify the **Description**.

Select the **Inactive** checkbox will inactivate the current Result Code.

Select **Save** to save the Result Code.

Health and Wellness Template Setup Window

Use the Health and Wellness Template Setup window to set up and assign unlimited number of Templates with descriptions and be able to set the status of the Template to Active or Inactive. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Health and Wellness** and then click **Templates**.

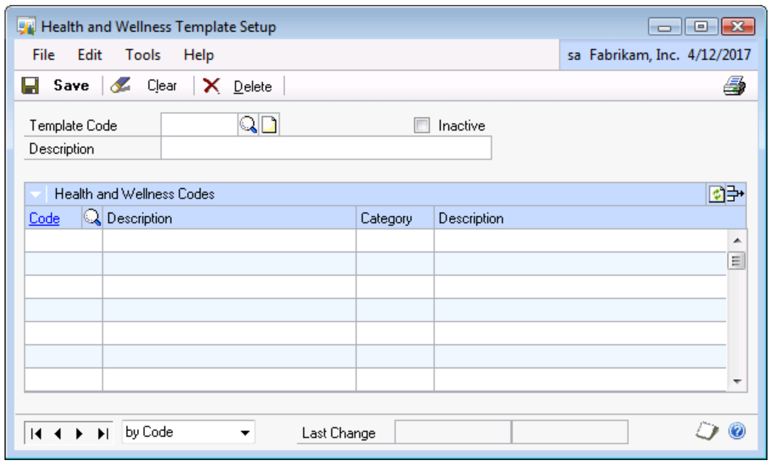


FIGURE 2.20 HEALTH AND WELLNESS TEMPLATE SETUP WINDOW

Employee defined templates can be used to assign defaults to employees. One template setup assigned can easily establish all the tests required by a certain position, employee class or grouping specific to each facility.

Enter or select a **Template Code** and enter or modify the **Description**.

The scrolling window allows the user to associate Health and Wellness Codes with a Template Code.

Enter or select a **Health and Wellness Code**.

The **Description** displays from the Health and Wellness Code Setup window.

The **Category and Description** displays from the Category Setup window.

Source Setup Window

Use the Source Setup window to create Source records. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Health and Wellness** and then click **Sources**.

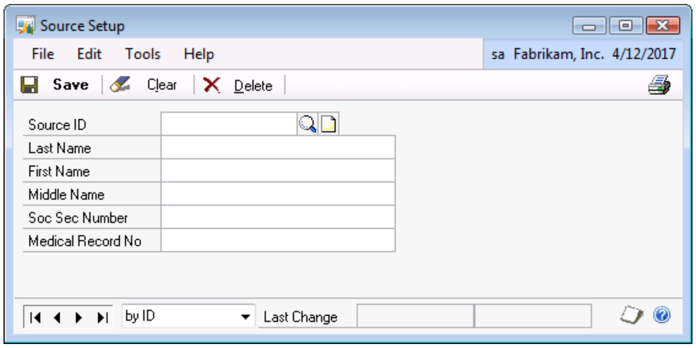


FIGURE 2.21 SOURCE SETUP WINDOW

Enter or select a **Source ID**.

Enter the **Last Name**, **First Name**, **Middle Name**, **Social Security Number** and **Medical Record Number**.

Select **Save** to save the Source ID.

Category Setup Window

Use the Category Setup window to set up an unlimited number of Category Codes with descriptions and be able to set the status of the code to Active or Inactive. The Category Code can be used for report grouping and restrictions. Example: Immunizations, Vaccinations, Blood Exposure, Injuries and Tests. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Setup content pane, click **Health and Wellness** and then click **Categories**.

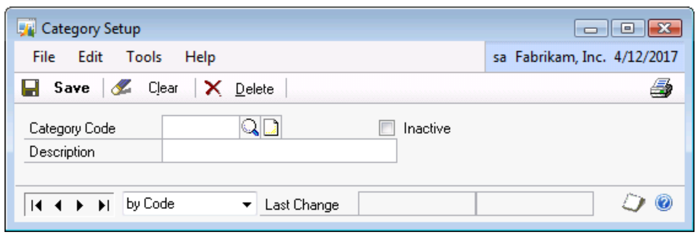


FIGURE 2.22 CATEGORY SETUP WINDOW

Enter or select a **Category Code**. Enter or modify the **Description**.

Select the **Inactive checkbox** to inactivate the current Category Code.

Select **Save** to save the Category Code.

Summary

A variety of setup windows need to be completed prior to using the Advanced Human Resources module. Each of the components to Advanced Human Resources has dedicated windows for this purpose.

Key points to remember from this chapter:

- Future Effective records can be set up to pre-enter information for upcoming changes to benefit plans.
- After completing the appropriate setup for Certification, License and Training Manager, certifications, licenses and training can be assigned to a department and position combination as required.
- Templates can be developed to assign predetermined health and wellness codes that will eventually be assigned on the employee level.

CHAPTER 3: EMPLOYEE MAINTENANCE

Objectives

The objectives are:

- Learn to effectively use Benefit Lifecycle Manager by understanding (1) the changes on the employee dependents window, (2) the changes on the employee beneficiary window, (3) how to connect benefits to dependents and (4) how to activate Future Effective records.
- Assign certifications, licenses and training to employee records.
- Learn to assign Health and Wellness codes, categories and templates to employees and to track source information in the event of a work-related injury or illness.

Introduction

After completing the required setup in Chapter 2, the next step is to assign data to employee records. Advanced Human Resources allows the organization to input data for benefit plan changes in advance of the effective date by using future effective records, allows certifications, licenses and training courses and classes to be assigned to individual employees once attained or completed, and finally allows for the collection of additional data for a work-related injury or illness.

Benefit Lifecycle Manager

The first component of Advanced Human Resources is the Benefit Lifecycle Manager. This component has added additional fields to the employee dependent and beneficiary windows. In addition, benefits can now be assigned to dependents for better tracking of insurance coverages and costs.

Employee Dependents Window

Within the Employee Dependents window, data fields have been added to set up dependents associated with the employee. To open this window, click the **HR and Payroll** series button, click **Human Resources o**n the Cards content pane, click **Employee** and then click **Dependents**.

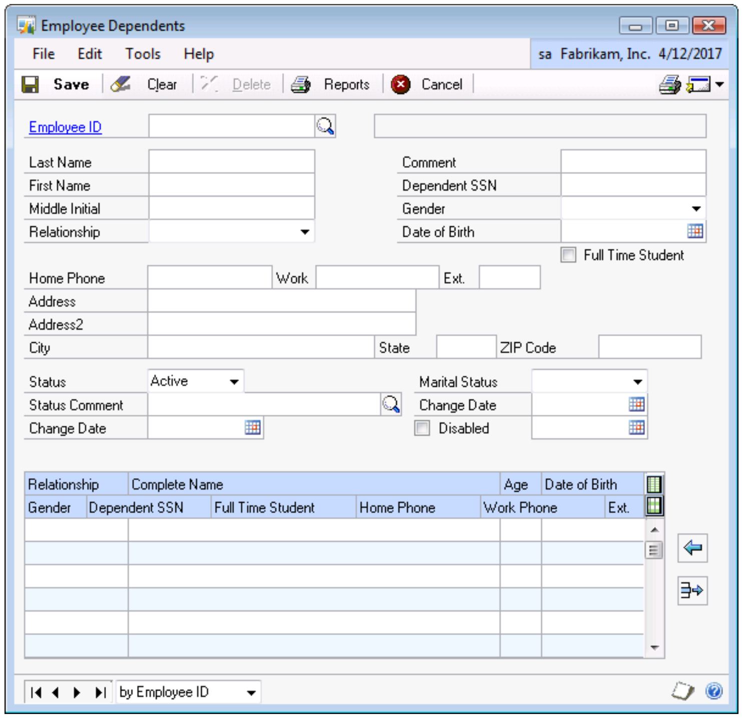


FIGURE 3.1 EMPLOYEE DEPENDENTS WINDOW

The data fields are listed below:

- **Status** – Active or Inactive
- **Status Comment** – These options are defined in the Plan Status Reason window
- **Change Date**
- **Marital Status** – Married, Single or N/A
- **Change Date**
- **Disabled** checkbox
- **Disabled Date**

Employee Beneficiaries Window

Within the Employee Beneficiaries window, additional data fields are available to define beneficiaries associated with the employee and specific benefit plan. To open this window, click the **HR and Payroll** series button, click the **Human Resources** on the Cards content pane, click **Employee - Benefits**, select a **Benefit Enrollment** option, select an **Employee ID**, select a **Benefit code**, click the **Benefit** icon and then click **Beneficiary Definition**.

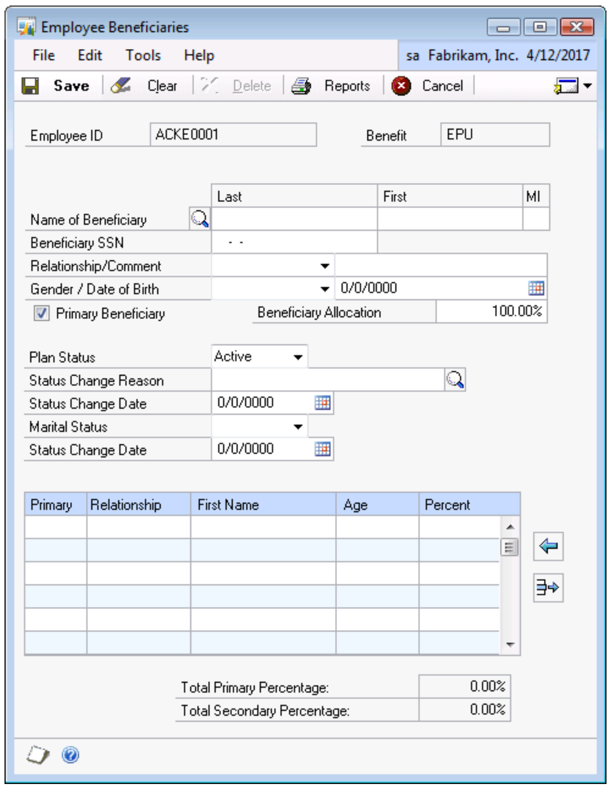


FIGURE 3.2 EMPLOYEE BENEFICIARIES WINDOW

The data fields are listed below:

- **Plan Status** – Active or Inactive
- **Status Change Reason** – lookup button now allows information to be defaulted from existing Dependents.
- **Status Comment** – These options are defined in the Plan Status Reason window
- **Change Date**
- **Marital Status** – Married, Single or N/A
- **Change Date**
- **Disabled** checkbox
- **Disabled Date**

Assign Template Window

Selecting a Template will create employee and code records for all codes associated with that Template. You can then assign any Dates and Results to those codes in this window.

Example: There may be a template for New Employees that would have listed 5 Immunizations, Vaccinations and Tests that a new employee would need. You could assign that template and the system would create the 5 records. If only 3 were needed, then you would uncheck the 2 that do not apply.

To open the Assign Template window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee**, click **Health and Wellness**, enter an **Employee ID** and then click the **Assign Template** button.

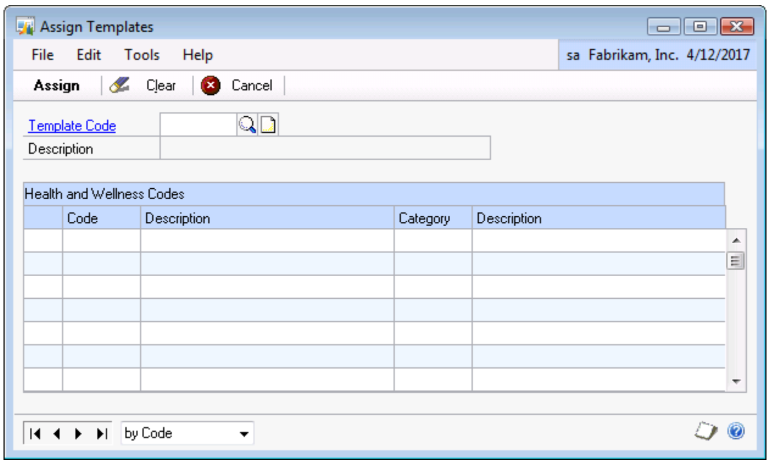


FIGURE 3.3 ASSIGN TEMPLATES WINDOW

4. Enter or select a **Template Code**.
5. The **Description** displays from the Health and Wellness Template Setup window.
6. The Scrolling window allows you to associate Health and Wellness codes with a Template Code.

Employee Benefit Dependents Window

The Employee Benefit Dependents window allows Human Resources to define the employee dependents associated with a specific employee benefit plan. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee - Benefits** and select a **Benefit Enrollment** option, enter an **Employee ID**, select a **Benefit code**, click the **Benefits icon** and then click **Dependents**.

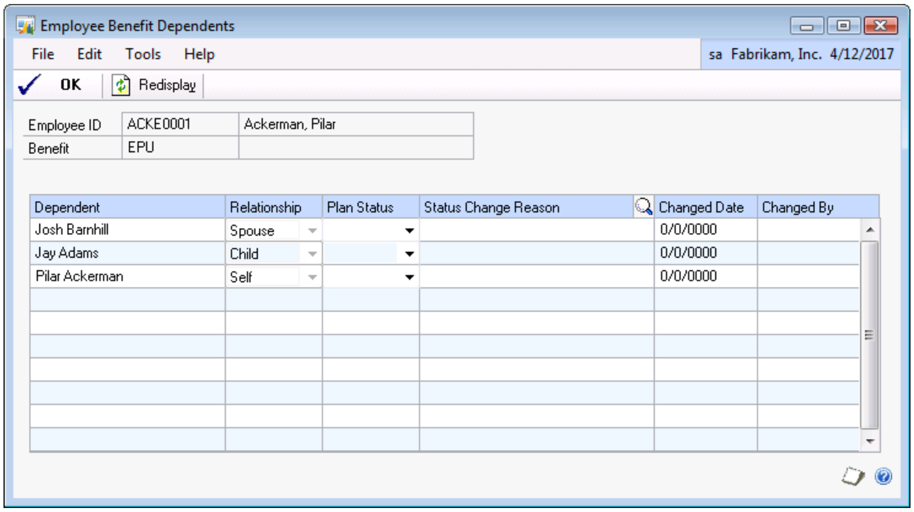


FIGURE 3.4 EMPLOYEE BENEFIT DEPENDENTS WINDOW

Future Effective Activation Window

The Future Effective Activation window is used to activate the future effective date records. The following steps should be followed. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Utilities content pane and then click **Activate Future Effective Benefits**.

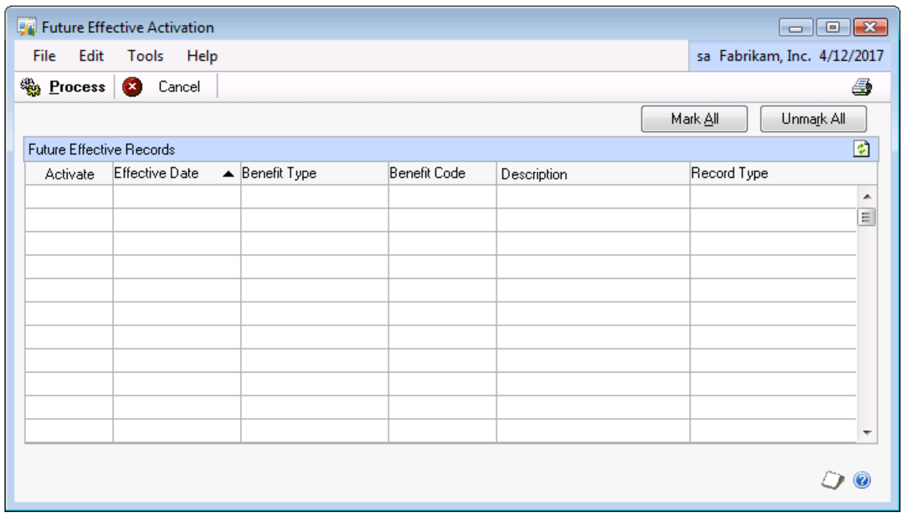


FIGURE 3.5 FUTURE EFFECTIVE ACTIVATION WINDOW

Within the Future Effective Activation scrolling window, the records can be sorted ascending or descending by columns. This window will display all Future Effective records that currently exist and will default sorted by Effective Date in ascending order.

- Select the **Activate** checkbox to process the Future Effective Activation for this benefit code. When selected, if corresponding HR or Payroll Future Effective records exist the system prompts: “Do you want to select corresponding HR/Payroll records?
  - **Yes** prompts the user to select the Activate checkbox for all records that exist equal to the Benefit Code.
  - **No** prompts the user to select the Activate checkbox for the one record.

Select **Mark All** or **Unmark All** to select or unselect all Future Effective records displayed in the scrolling window.

- **Process** validates that there are current records marked as ACTIVATE.
  - If there are no current records marked as ACTIVATE or any records available to process, the system prompts: “You have not marked any records for processing.”

- If there are current records marked as ACTIVATE the process moves the current Microsoft Dynamics GP records to the Benefit Lifecycle Manager history tables, then moves the Benefit Lifecycle Manager Future Effective records into the core Microsoft Dynamics GP tables and remove them from the Benefit Lifecycle Manager pending tables. Remember to ACTIVATE the codes on or past the Effective Date. By ACTIVATING before the Effective Date will make the changes current, regardless of the Effective Date.

Once the process is complete, the window will close.

The records in the window can be printed by selecting the **Print** icon on the window. The print will display the records in the order that they appear on the window.

Certification, License and Training Manager

The next component of Advanced Human Resources is Certification, License and Training Manager. Using this component, the user can assign certifications such as a Human Resources certification to a particular employee. In addition, licenses with unique identifying numbers can be assigned. This could be as simple as a driver's license or as complex as the DEA and other Medical Licenses required by a doctor. Another part of Advanced Human Resources enhances the Employee Training window allowing more information to be tracked. Finally, Advanced Human Resources allows the user to update multiple employee training records with completion and expiration dates by using a course/class combination.

Certification Entry Window

Use the Certification Entry window to add or update the Certification data for a specific employee. Multiple certifications may be assigned to an employee. You will be able to quickly update the expiration date of a certification and retain the prior expiration date for historical purposes.

To open the Certification Entry window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee** and then click **Certifications**.

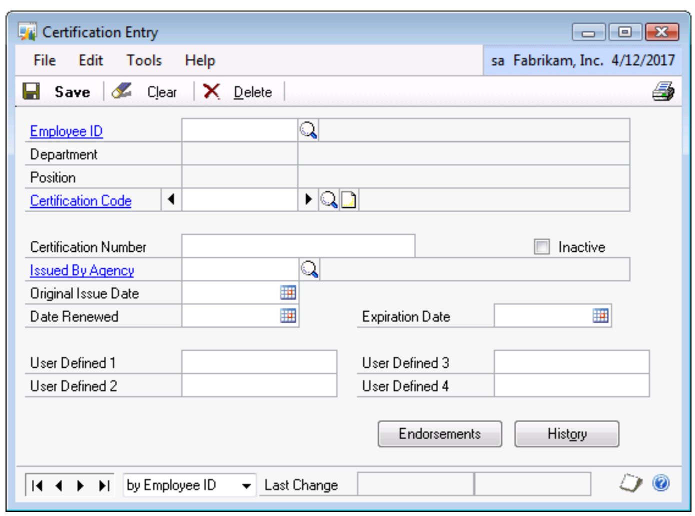


FIGURE 3.6 CERTIFICATION ENTRY WINDOW

Enter or select an **Employee ID** to assign the Certification Code. The **Department** and **Position** fields displays from the Employee Maintenance window.

Enter or select a **Certification Code**.

The following fields may or may not be required based on the Training Course Required options selected on the Certification Setup window:

- **Issued By Agency**
- **Original Issued Date**
- **Expiration Date**
- **Certification Number**
- **Date Renewed**

Use the **User Defined** textboxes to track four additional pieces of Certification related information.

Select the **Endorsements** button to open the Endorsement Employee Certification Assignment window.

Select the **History** button to open the Certification History window to display the history information corresponding to the Certification Entry record currently open.

The **Inactive** checkbox will inactivate the current Certification Entry.

Information on this window can be made available to employees and their managers by using Business Portal.

License Entry Window

Use the License Entry window to add or update License data for a specific employee. Multiple licenses may be assigned to an employee. You will be able to quickly update the expiration date of a license and retain the prior expiration date for historical purposes.

To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee** and then click **Licenses**.

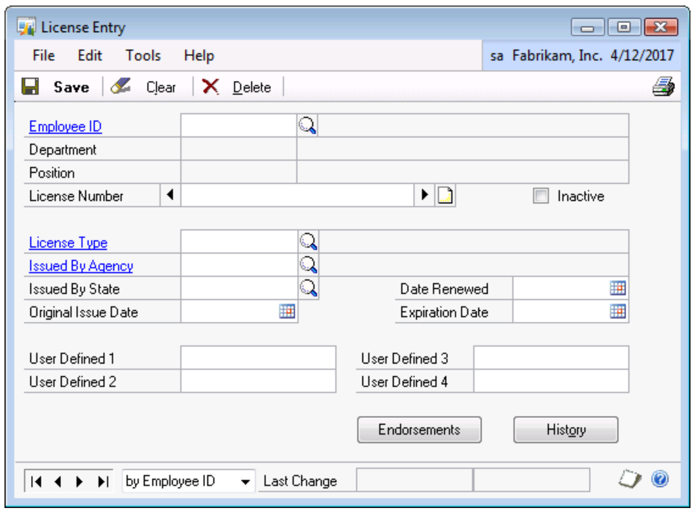


FIGURE 3.7 LICENSE ENTRY WINDOW

1. Enter or select an **Employee ID** to assign the License Number. The **Department** and **Position** fields displays from the Employee Maintenance window.
2. Enter a **License Number**. This number must be unique and not assigned to any employee.
3. Select or enter a **License Type** that corresponds to the **License Number**.
4. Use the **User Defined** textboxes to track four additional pieces of License related information.
5. Select **Endorsement** to open the Endorsement Employee License Assignment window.
6. Select **History** to open the License History window to display the history information corresponding to the License Entry record currently open.

The **Inactive** checkbox will inactivate the current License Entry.

Information on this window can be made available to employees and their managers by using Business Portal.

Employee Training Window

The modified Employee Training window replaces the Core Employee Training window. To open the Employee Training window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee** and then click the second **Training** option.

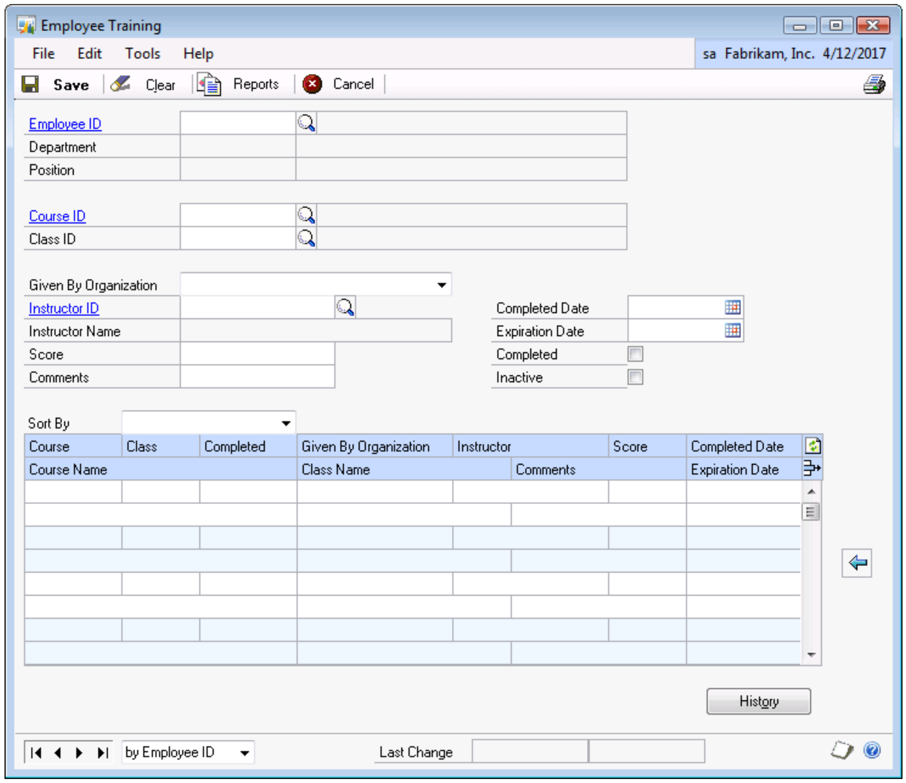


FIGURE 3.8 EMPLOYEE TRAINING WINDOW

The additional fields include the following:

- **Given By Organization** - enter the name of the Organization led the class
- **Instructor ID** - enter the name of the instructor
- **Expiration Date** - enter the expiration date for this class
- **Score** - enter the score that the employee earned for this class
- **Inactive** - select the inactive checkbox if appropriate for the employee

Enter or select an **Employee ID**. The **Department** and **Position** fields displays from the Employee Maintenance window.

Enter or select a **Course ID** and **Class ID**.

Enter or select the following if the field is Required based on the Training Course Definition Additional Information window:

- **Given By Organization**
- **Instructor ID**
- **Score**

Enter a **Comment** when applicable.

Enter or select a **Completed Date** and **Expiration Date**.

Select the **Completed** checkbox to select this Course ID/Class ID as completed when applicable.

Select the **Inactivate** checkbox to inactivate this Course ID/Class ID when applicable.

Select the **History** button to open the Training History window for the corresponding Employee Training record currently open.

Information on this window can be made available to employees and their managers by using Business Portal.

Mass Training Update Window

The Mass Training Update feature allows the user to access one window where any/all employee(s) can be updated for a Course and Class combination including the additional information made available in Certification, License and Training Manager as it relates to the completion and expiration dates of their training.

To open the Mass Training Update window, click the **HR and Payroll** series button, click **Human Resources** on the **Utilities** content pane and then click **Mass Training Update**.

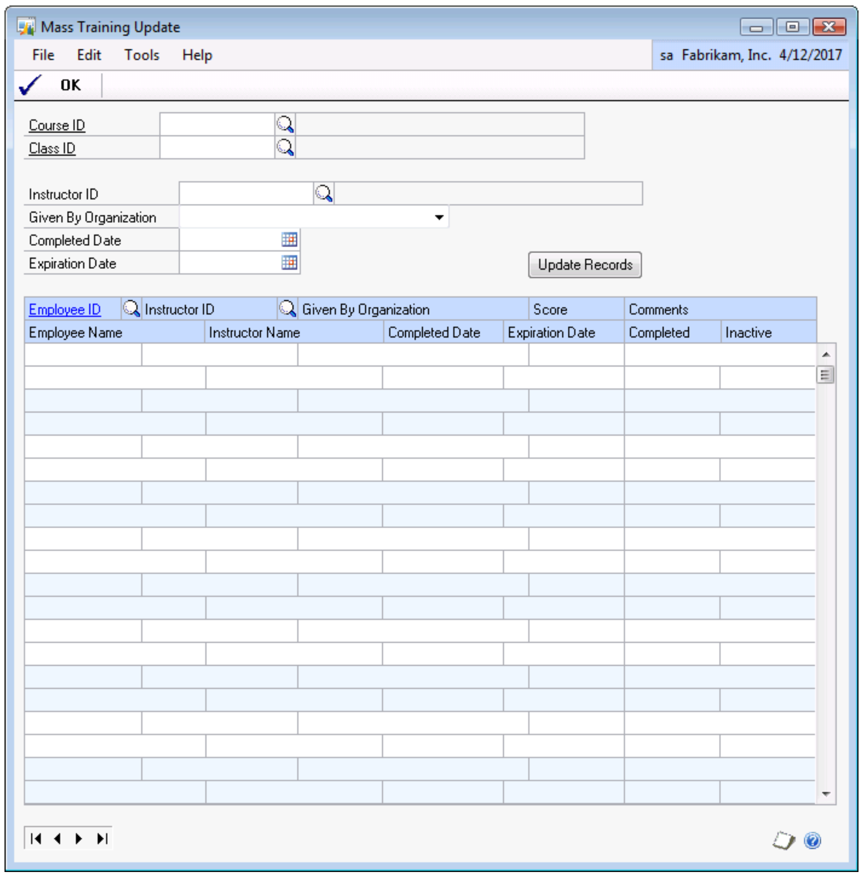


FIGURE 3.9 COURSE AND CLASS EMPLOYEE ENTRY WINDOW

Enter or select the **Course ID**, **Class ID**, **Instructor ID**, **Given By Organization**, **Completed Date** and **Expiration Date**.

Update Records will allow you to update multiple employee records by **Instructor ID**, **Given By Organization**, **Completed Date** and/or **Expiration Date**.

Employee Health and Wellness Manager

Health and Wellness information can be tracked for employees including additional information for work-related injuries and illnesses. For example in the health care industry an employee may be required to have certain vaccinations or immunizations and to keep them up to date during their employment. This information, along with results can be tracked by assigning the various categories and codes set up to an employee.

There is also additional information that can be collected by employee for a work-related injury or illness. Source information can be added to the records allowing the user to simultaneously track ongoing treatment for both parties.

Health and Wellness Entry Window

Use the Health and Wellness Entry window to provide features for tracking all immunizations, vaccinations and tests required for each employee. The results for each test can also be recorded.

To open the Health and Wellness Entry window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee** and then click **Health and Wellness**.

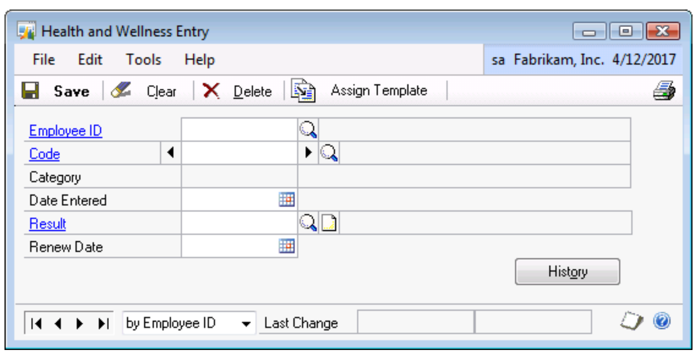


FIGURE 3.10 HEALTH AND WELLNESS ENTRY WINDOW

Enter or select an **Employee ID**. The **Description** displays from the Employee Maintenance window.

Enter or select the **Health and Wellness Code** that you wish to assign to employee. The **Description** and **Category** displays from the Health and Wellness Code Setup window.

Enter or select the **Date Entered**, **Result** and **Renew Date**.

Select the **History** button to open the Health and Wellness History window for the current employee and code.

Injury and Illness Details Window

The purpose of the Injury and Illness Details window is to provide features for tracking injury information for each employee and sources. The results for each test can also be recorded.

The Injury and Illness Detail window will enable you to schedule follow-up vaccinations, immunizations and tests. The history will be tracked indefinitely for each incident of immunizations, vaccinations and tests.

To open the Injury and Illness Details window, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee** and then click **Injury and Illness Details**.

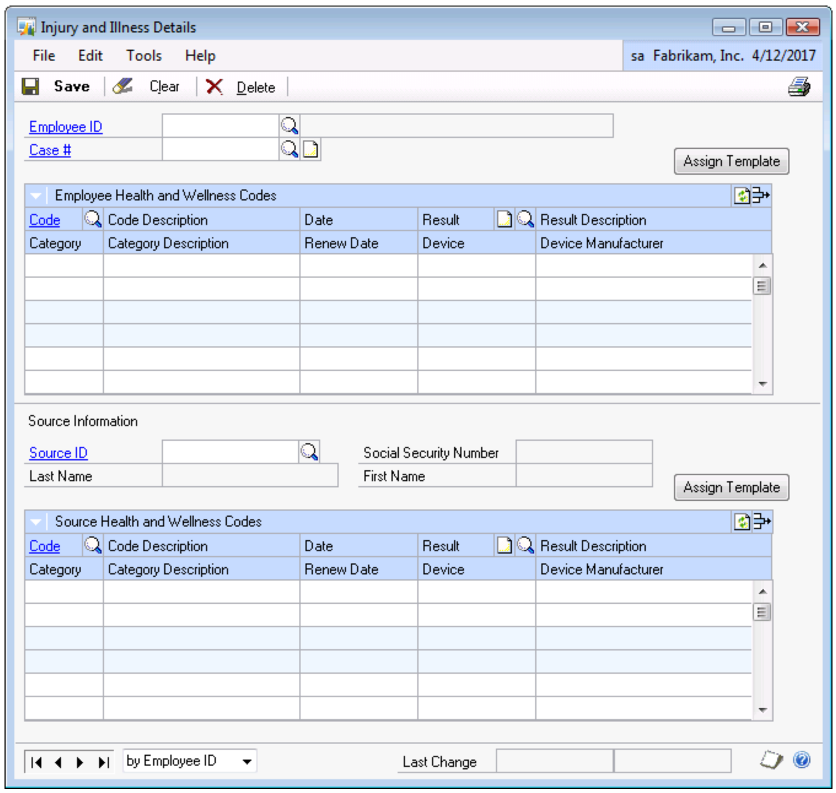


FIGURE 3.11 INJURY AND ILLNESS DETAILS WINDOW

Enter or select an **Employee ID**. The **Description** displays from the Employee Maintenance window.

Enter or select a **Case #**.

The scrolling window allows you to enter Injury and Illness data related to the Employee and Case Number selected.

The **Assign Template** button opens the Assign Templates window.

The **Source Information** section allows you to enter the Source related to this Employee and Case Number.

Enter or select a **Source ID**. The **Social Security Number**, **Last Name** and **First Name** displays from the Source Setup window.

The Source Health and Wellness Codes scrolling window allows you to enter Injury and Illness data related to the Employee and Case Number and Source ID selected.

The **Assign Template** button will open the Assign Templates window.

Assign Templates Window

Use the Assign Template window to check which line items from the appropriate template to assign to an employee or source.

To open the Assign Templates, click the **HR and Payroll** series button, click **Human Resources** on the Cards content pane, click **Employee**, click **Injury and Illness Details** and then click the **Assign Template** button.

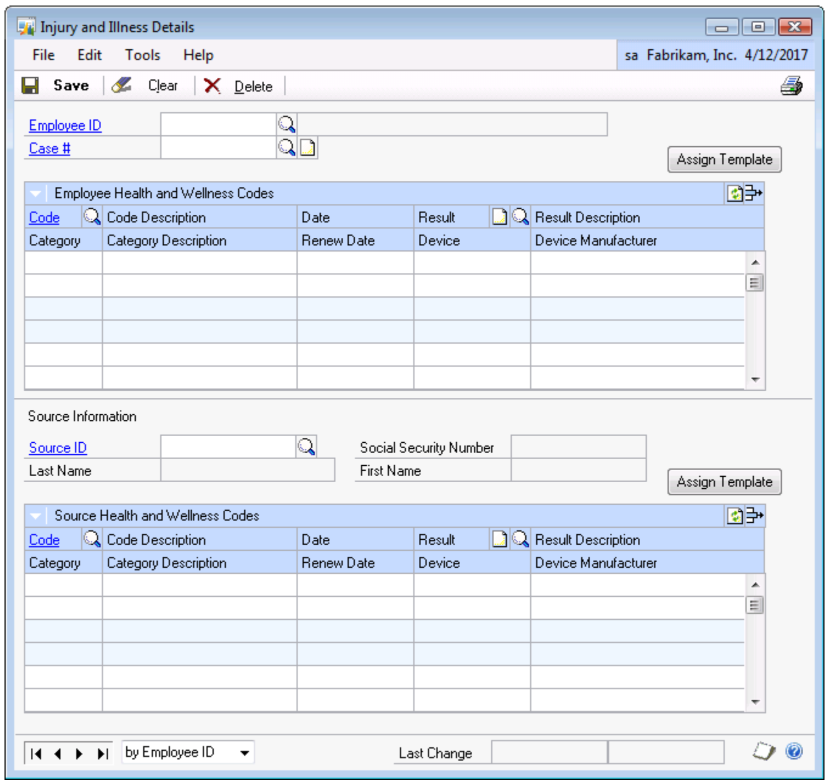


FIGURE 3.12 ASSIGN TEMPLATES WINDOW

Enter or select a **Template Code**. The **Description** displays from the Health and Wellness Template Setup window.

Health and Wellness Codes scrolling window allows you to associate Health and Wellness codes with a Template Code.

Summary

Advanced Human Resources allows for the tracking of additional dependent and beneficiary information, as well as allowing benefit information to be assigned to dependents. In addition, the organization can track information related to certifications and licenses held by their employees. Finally, Health and Wellness information can be tracked for employees including additional information for work-related injuries and illnesses.

Key points to remember from this chapter:

- Assign benefit plans to enrolled dependents.
- Future Effective records need to be activated on or after the effective date.
- Certifications and Licenses can be tracked as they relate to employees including the related history.
- Employee records can be updated with course and class completion and expiration dates using the Mass Training Update feature.
- Templates can be assigned to employees for health related data or in the case of a work-related injury or illness.
- Source data can be tracked for work-related injuries and illnesses.

CHAPTER 4: INQUIRIES AND REPORTS

Objectives

The objectives are:

- Review the inquiries available for Advanced Human Resources and learn to print the information found on the various screens.
- Understand the options available for printing reports in Advanced Human Resources.

Introduction

Advanced Human Resources provides both Inquiry windows and the ability to print reports. The Inquiry windows for the most part are the history windows for most of the components. The exception to this is the Percent Current Inquiry, which is an inquiry allowing for various selections to be made to narrow or broaden the scope of records shown.

Inquiries

The Advanced Human Resources Inquiries contain the history windows for Certification, License and Training Manager, as well as the inquiry for Percent Current. The information on the windows can be printed from the window. In the case of the Percent Current Inquiry, both the information on the screen and a Percent Current Totals report can be printed using the printer icon on the window.

Certification History

Use the Certification History window to view all the activity for a specific Employee/Certification record. The history record is written as the latest History record when changes are saved on the Certification Entry window.

To open the Certification History window, click the **HR and Payroll** series button, click **Human Resources** on the Inquiry content pane and then click **Certification History**.

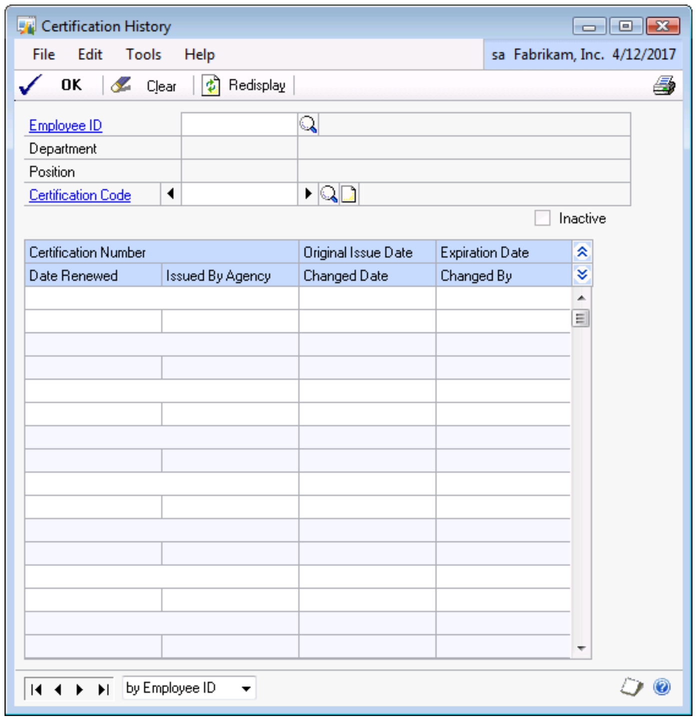


FIGURE 4.1 CERTIFICATION HISTORY WINDOW

Enter or select an **Employee ID**. The **Department** and **Position** fields displays from the Employee Maintenance window.

Enter or select a **Certification Code** for current Employee.

The **Inactive** checkbox will inactivate the current Certification History.

License History

Use the License History window to view all the activity for a specific Employee/License record. The history record is written as the latest History record when changes are saved on the License Entry window.

To open the License History window, click the **HR and Payroll** series button, click **Human Resources** on the Inquiry content pane and then click **License History**.

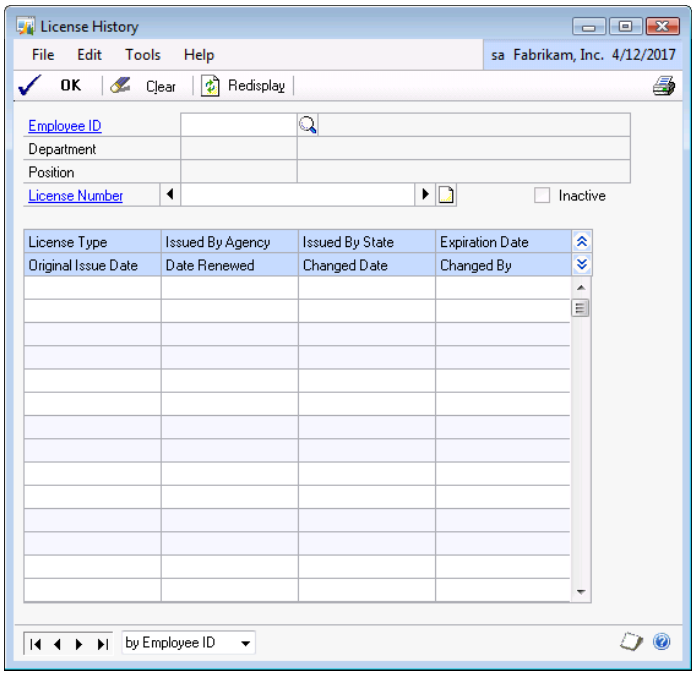


FIGURE 4.2 LICENSE HISTORY WINDOW

1. Enter or select an **Employee ID**. The **Department** and **Position** fields displays from the Employee Maintenance window.
2. Enter or select a **License Number** for the current Employee.

The **Inactive** checkbox will inactivate the current License History.

Training History

Use the Training History window to view all the transactions by Course/Class ID for a specific employee. The history record is written as the latest History record when changes are saved on the Employee Training window.

To open the Training History window, click the **HR and Payroll** series button, click **Human Resources** on the Inquiry content pane and then click **Training History**.

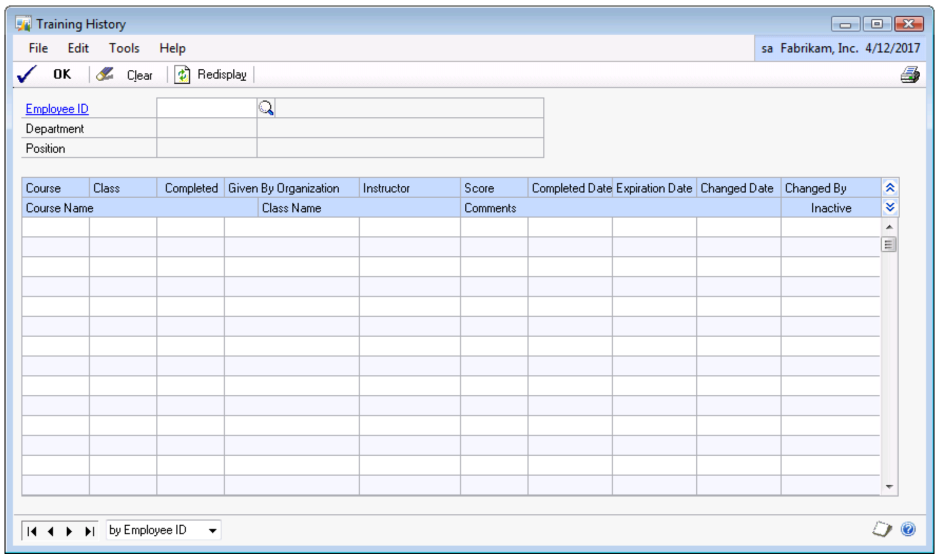


FIGURE 4.3 TRAINING HISTORY WINDOW

Note: *Training that the employee has taken will appear on the Employee Training window.*

Enter or select an **Employee ID**. The **Department** and **Position** fields will display from the Employee Maintenance window.

Percent Current Inquiry

Use the Percent Current Inquiry window to measure actual versus requirements for all positions within a department vs. position by position. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Inquiry content pane and then click **Percent Current**.

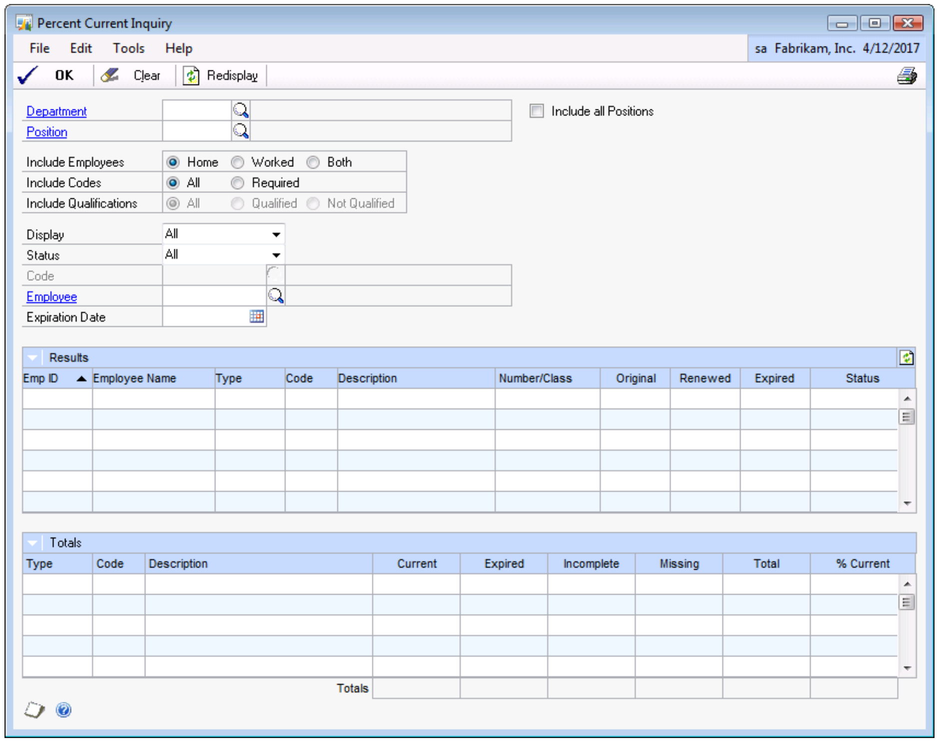


FIGURE 4.4 PERCENT CURRENT INQUIRY WINDOW

Enter or select a **Department** and **Position**.

Select the **Include all Positions** checkbox to select all Positions within the selected Department. All positions are checked that have a relationship with the selected department in the “Certification, License and Training Required by Department and Position” window.

Select an **Include Employees** option:

- **Home:** Includes employees that have the current Department and Position as their Home Department and Position.
- **Worked:** Includes employees that have worked in the current Department and Position.
- **Both:** Includes both Home and Worked employees.

Select an **Include Codes** option:

- **All:** Displays ALL codes
- **Required:** Displays only the Required Certification, License or Training codes.

Select an **Include Qualifications**:

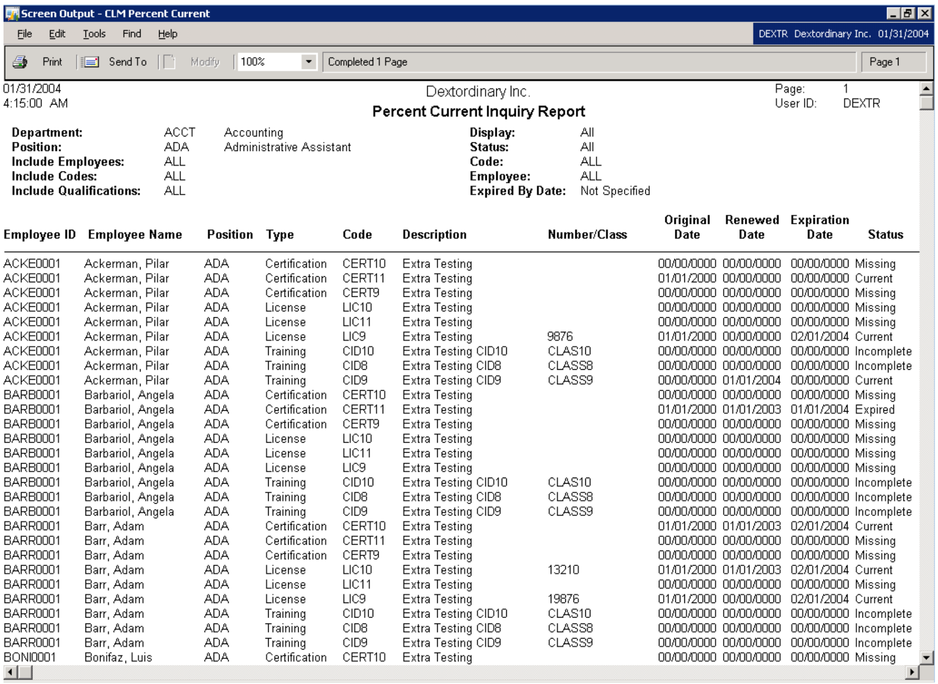
- **All:** Displays ALL Qualifications
- **Qualified:** Displays Qualified employees.
- **Not Qualified:** Displays non-qualified employees.

Select a **Display** and **Status**.

Enter or select a **Code**, **Employee ID** and **Expiration Date**.

Select the **Printer** button to print the Percent Current Inquiry Report and Percent Current Totals Report.

Percent Current Inquiry Report



Screen Output - CLM Percent Current

File Edit Tools Find Help — DEXTR Dextordinary Inc. 01/31/2004

Print | Send To | Modify | 100% | Completed 1 Page | Page 1

01/31/2004
4:15:00 AM

Dextordinary Inc.

Percent Current Inquiry Report

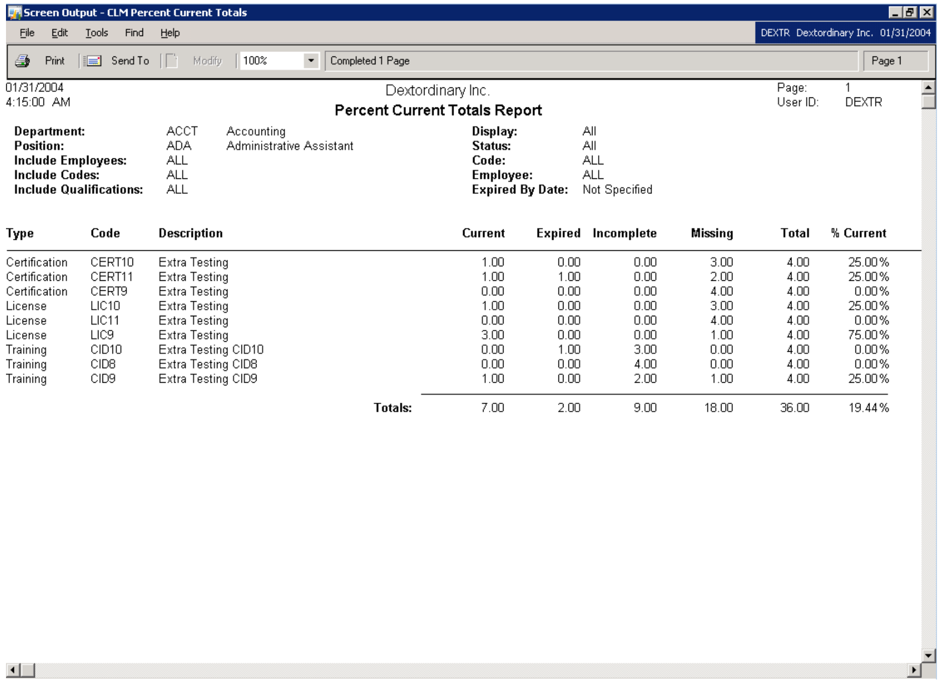
Page: 1
User ID: DEXTR

Department:	ACCT	Accounting	**Display:**	All
Position:	ADA	Administrative Assistant	**Status:**	All
Include Employees:	ALL		**Code:**	ALL
Include Codes:	ALL		**Employee:**	ALL
Include Qualifications:	ALL		**Expired By Date:**	Not Specified

Employee ID	Employee Name	Position	Type	Code	Description	Number/Class	Original Date	Renewed Date	Expiration Date	Status
ACKE0001	Ackerman, Pilar	ADA	Certification	CERT10	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
ACKE0001	Ackerman, Pilar	ADA	Certification	CERT11	Extra Testing		01/01/2000	00/00/0000	00/00/0000	Current
ACKE0001	Ackerman, Pilar	ADA	Certification	CERT9	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
ACKE0001	Ackerman, Pilar	ADA	License	LIC10	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
ACKE0001	Ackerman, Pilar	ADA	License	LIC11	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
ACKE0001	Ackerman, Pilar	ADA	License	LIC9	Extra Testing	9876	01/01/2000	00/00/0000	02/01/2004	Current
ACKE0001	Ackerman, Pilar	ADA	Training	CID10	Extra Testing CID10	CLAS10	00/00/0000	00/00/0000	00/00/0000	Incomplete
ACKE0001	Ackerman, Pilar	ADA	Training	CID8	Extra Testing CID8	CLASS8	00/00/0000	00/00/0000	00/00/0000	Incomplete
ACKE0001	Ackerman, Pilar	ADA	Training	CID9	Extra Testing CID9	CLASS9	00/00/0000	01/01/2004	00/00/0000	Current
BARB0001	Barbariol, Angela	ADA	Certification	CERT10	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARB0001	Barbariol, Angela	ADA	Certification	CERT11	Extra Testing		01/01/2000	01/01/2003	01/01/2004	Expired
BARB0001	Barbariol, Angela	ADA	Certification	CERT9	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARB0001	Barbariol, Angela	ADA	License	LIC10	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARB0001	Barbariol, Angela	ADA	License	LIC11	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARB0001	Barbariol, Angela	ADA	License	LIC9	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARB0001	Barbariol, Angela	ADA	Training	CID10	Extra Testing CID10	CLAS10	00/00/0000	00/00/0000	00/00/0000	Incomplete
BARB0001	Barbariol, Angela	ADA	Training	CID8	Extra Testing CID8	CLASS8	00/00/0000	00/00/0000	00/00/0000	Incomplete
BARB0001	Barbariol, Angela	ADA	Training	CID9	Extra Testing CID9	CLASS9	00/00/0000	00/00/0000	00/00/0000	Incomplete
BARR0001	Barr, Adam	ADA	Certification	CERT10	Extra Testing		01/01/2000	01/01/2003	02/01/2004	Current
BARR0001	Barr, Adam	ADA	Certification	CERT11	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARR0001	Barr, Adam	ADA	Certification	CERT9	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARR0001	Barr, Adam	ADA	License	LIC10	Extra Testing	13210	01/01/2000	01/01/2003	02/01/2004	Current
BARR0001	Barr, Adam	ADA	License	LIC11	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing
BARR0001	Barr, Adam	ADA	License	LIC9	Extra Testing	19876	01/01/2000	00/00/0000	02/01/2004	Current
BARR0001	Barr, Adam	ADA	Training	CID10	Extra Testing CID10	CLAS10	00/00/0000	00/00/0000	00/00/0000	Incomplete
BARR0001	Barr, Adam	ADA	Training	CID8	Extra Testing CID8	CLASS8	00/00/0000	00/00/0000	00/00/0000	Incomplete
BARR0001	Barr, Adam	ADA	Training	CID9	Extra Testing CID9	CLASS9	00/00/0000	00/00/0000	00/00/0000	Incomplete
BONI0001	Bonifaz, Luis	ADA	Certification	CERT10	Extra Testing		00/00/0000	00/00/0000	00/00/0000	Missing

FIGURE 4.5 PERCENT CURRENT INQUIRY REPORT

Percent Current Totals Report



Screen Output - CLM Percent Current Totals

File Edit Tools Find Help DEXTR Dextordinary Inc. 01/31/2004

Print Send To Modify 100% Completed 1 Page Page 1

01/31/2004
4:15:00 AM

Dextordinary Inc.

Percent Current Totals Report

Page: 1
User ID: DEXTR

Department:	ACCT	Accounting	**Display:**	All	
Position:	ADA	Administrative Assistant	**Status:**	All	
Include Employees:	ALL		**Code:**	ALL	
Include Codes:	ALL		**Employee:**	ALL	
Include Qualifications:	ALL		**Expired By Date:**	Not Specified	

Type	Code	Description	Current	Expired	Incomplete	Missing	Total	% Current
Certification	CERT10	Extra Testing	1.00	0.00	0.00	3.00	4.00	25.00%
Certification	CERT11	Extra Testing	1.00	1.00	0.00	2.00	4.00	25.00%
Certification	CERT9	Extra Testing	0.00	0.00	0.00	4.00	4.00	0.00%
License	LIC10	Extra Testing	1.00	0.00	0.00	3.00	4.00	25.00%
License	LIC11	Extra Testing	0.00	0.00	0.00	4.00	4.00	0.00%
License	LIC9	Extra Testing	3.00	0.00	0.00	1.00	4.00	75.00%
Training	CID10	Extra Testing CID10	0.00	1.00	3.00	0.00	4.00	0.00%
Training	CID8	Extra Testing CID8	0.00	0.00	4.00	0.00	4.00	0.00%
Training	CID9	Extra Testing CID9	1.00	0.00	2.00	1.00	4.00	25.00%
		Totals:	7.00	2.00	9.00	18.00	36.00	19.44%

FIGURE 4.6 PERCENT CURRENT TOTALS REPORT

Employee Certifications, Licenses and Training

Use the Certification, License and Training Inquiry window to view Certification, License and/or Training assigned to specific Employee. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Inquiry content pane and then click **Employee Certifications, Licenses and Training**.

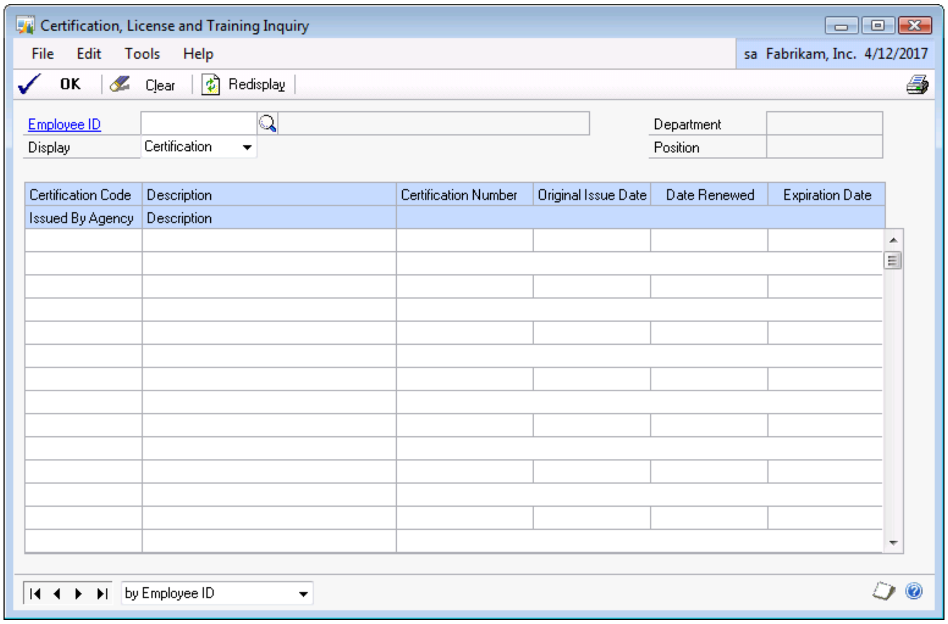


FIGURE 4.7 CERTIFICATION, LICENSE AND TRAINING INQUIRY WINDOW

Enter or select an **Employee ID**.

Select a **Display** option:

- Certification
- License
- Training

The scrolling window displays all of the History information related to the Display option selected.

Health and Wellness History

Use the Health and Wellness History window to see all the activity that has occurred for a specific Employee / Code record. The system tracks all changes to each existing record. To open this window, click the **HR and Payroll** series button, click **Human Resources** on the Inquiry content pane and then click **Health and Wellness History**.

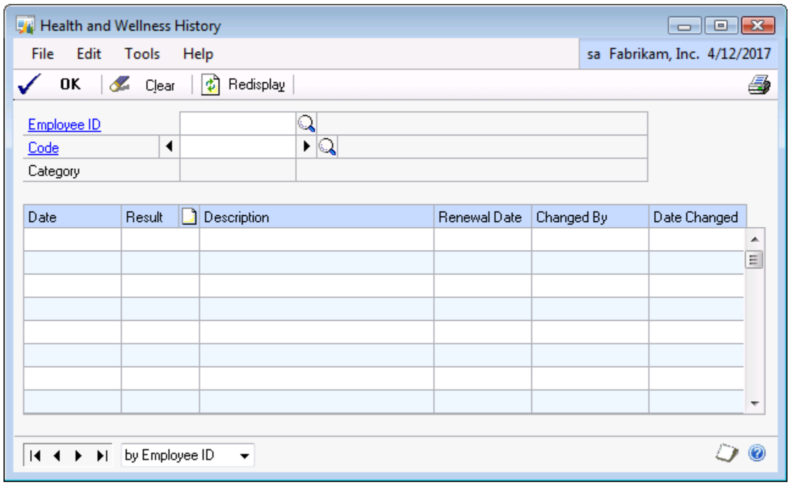


FIGURE 4.8 HEALTH AND WELLNESS HISTORY WINDOW

Enter an **Employee ID**. Enter or select a **Code**. The **Description** and **Category** displays from the Health and Wellness Code Setup window.

The scrolling window allows you to view all History information related to the Employee and the Health and Wellness Code selected.

Reports

The Advanced Human Resources module provides printing capabilities by using the printer icons on the individual windows. For example, pulling up the Category Setup window and selecting the printer icon (without making any Category selections) a report will print giving all of the Category Codes currently set up.

The other way to access information stored in Advanced Human Resources is by using SmartList Builder. Using this module, the user can build SmartLists with the data required to meet their reporting needs as it relates to Advanced Human Resources.

Excel®-based Reports

Certification, License and Training Manager allows the user to track certifications, licenses, training and other data for employees using back office functionality. The user can also view and report on this data via reports. It is necessary, however, for managers and other company officials, who may not be users of the Microsoft Dynamics GP system, to have access to this data for decision making purposes. These individuals can use Microsoft Office Excel reporting to meet their unique needs for viewing and sorting certification, license and training data and for customizing the presentation of data to satisfy their requirements.

Excel-based reporting is available for the following existing reports/inquiries.

- Certification List Report
- License List Report
- Training List Report
- Certification History Report
- License History Report
- Training History Report

The **Required Certification / License / Training report** can be used to measure actual versus requirements for all positions within a department/position.

SmartList Builder

If the Microsoft Dynamics GP SmartList Builder module is installed, all of the Certification, License and Training Manager and Employee Health and Wellness Manager fields will be available to create SmartList Queries.

NOTE: *Refer to the Microsoft Dynamics GP SmartList Builder documentation for instructions on using SmartList Builder.*

Summary

Advanced Human Resources provides inquiry and reporting capabilities by using History windows, the Percent Current Inquiry and the use of printer icons on individual windows. SmartList Builder also enhances the reporting capabilities.

Key points to remember from this chapter:

- Inquiries are available by using history windows and the Percent Current Inquiry.
- Reports are provided by using printer icons.
- SmartList Builder can provide additional printing capabilities based on the user's individual reporting requirements.

CHAPTER 5: CERTIFICATION, LICENSE AND TRAINING MANAGER FOR BUSINESS PORTAL

Objectives

The objectives are:

- Configure Certification, License and Training Manager to allow managers to view employee information.
- Review the screens available to employees from Business Portal as they pertain to Certifications, Licenses and Training information.
- Review the screens available to managers from Business Portal as they pertain to their employee's certifications, licenses and training information.

Introduction

Certification, License and Training Manager for Business Portal extends the reporting options for the Certification, License and Training Manager product into the Business Portal environment.

Certification, License and Training Manager for Business Portal provides the following features:

- Extends the enhanced Training Information from the Certification, License and Training Manager product
- Extends the Certification Information from the Certification, License and Training Manager product
- Extends the License Information from the Certification, License and Training Manager product
- Allows Managers to view subordinate employee Training Information, Certification Information and License Information
- Allows Manager Queries to access Certification, License and Training Manager Information

Certification, License and Training Manager for Business Portal Configuration

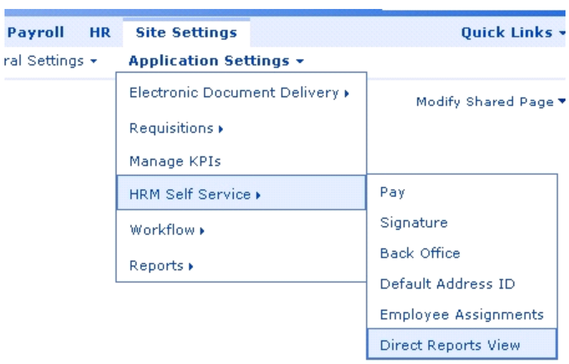
The Certification, License and Training Manager for Business Portal requires a few settings to be configured. These things need to be completed by the Business Portal Administrator before the application can be opened to be used by the Employee.

Enabling Manager Views within Business Portal

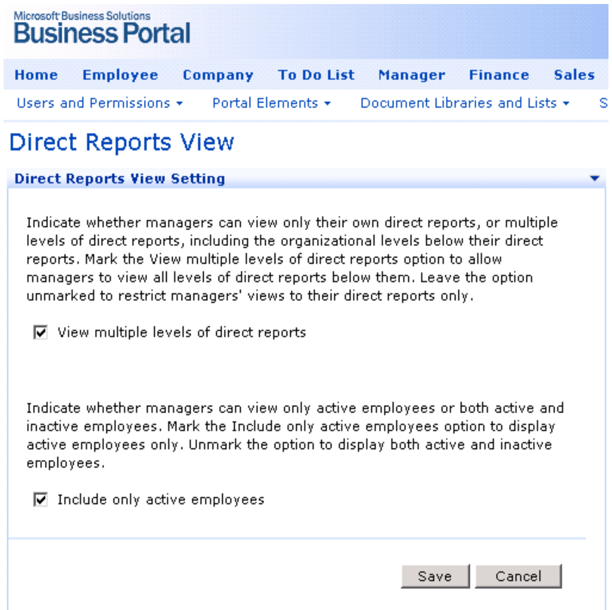
In order to allow managers/supervisors to view subordinate/team member information on the Training, Certification and License tabs, two items must be configured.

Direct Reports View

To the Direct Reports View, click Site Settings > Application Settings > HRM Self Service > Direct Reports View.

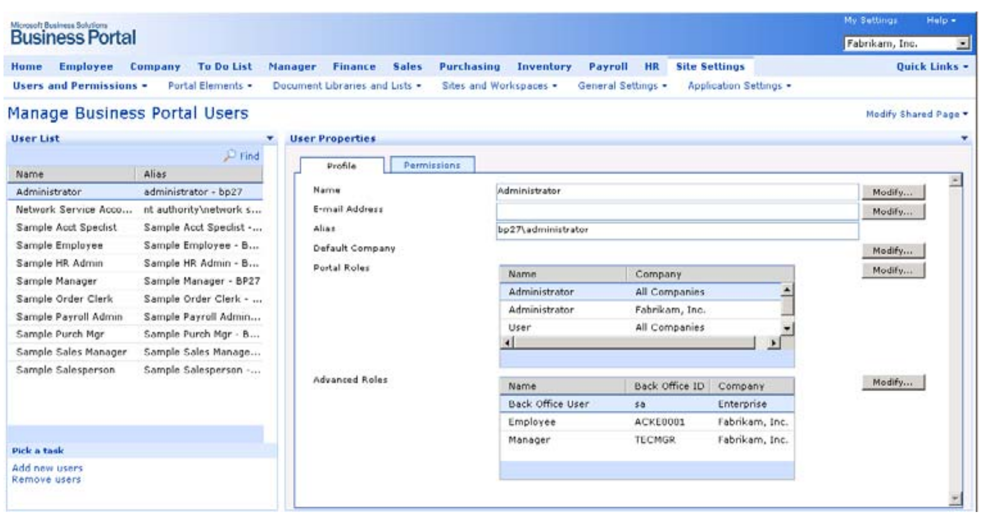


The “View multiple levels of direct reports” must be checked. If the checkbox is checked when Certification, License and Training Manager for Business Portal is installed, you will need to uncheck the box, click on the Save button, then check the box and click on the Save button again.

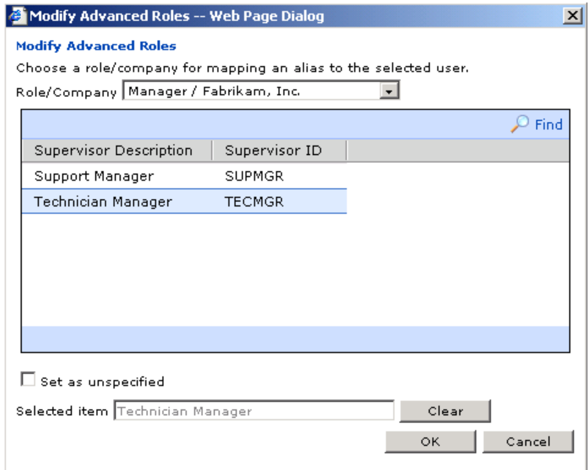


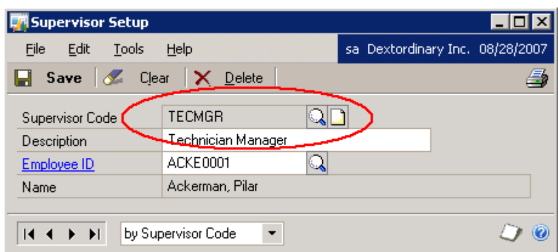
Manage Business Portal Users

To open the User Properties Profile tab, click Users > Permissions > Manage Business Portal Users > select the Manager Business Portal User Account > select Modify under the Advanced Roles section.



From the Role/Company drop-down list, select the appropriate Manager/Company. Select the Supervisor ID that corresponds to the Microsoft Dynamics GP Supervisor Setup record and click on OK.





Internet Explorer® Browser Configuration

Several Microsoft® Internet Explorer browser configuration and settings should be set to eliminate issues or capture and troubleshoot any issues that may occur. Follow the same recommendations as specified by Business Portal documentation.

Launching Certification, License and Training Manager for Business Portal

Once the installation and configuration of the Certification, License and Training Manager for Business Portal application has been completed, the application runs within Microsoft Dynamics GP Business Portal. The options are available via the same URL as accessing Microsoft Dynamics GP Business Portal.

For using the Certification, License, Training Manager for Business Portal, refer to the Certification, License, Training Manager for Business Portal User Guide document for further instruction.

Employee's Training, Certification and License Tabs

Employee Training Tab

An Employee may use the Training tab to view their training information as well as certification and license information. To open this tab, click Employee > Skills and Training > Training.

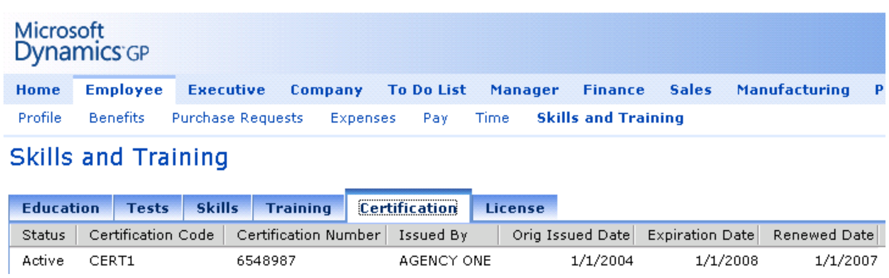
Status	Course ID	Course Name	Class ID	Class Name	Date Completed	Completed	Given By Organization	Instructor	Score
Active	SAFETY	Safety	1STAID	First Aid	1/1/2007	Yes	One Hospital	SmithP1	100

The following Status will display if:

- **Inactive** if the Inactive checkbox is checked on the Course/Class ID combination in the Employee Training Entry window within Microsoft Dynamics GP.
- **Expired** if the Inactive checkbox is NOT checked on the Course/Class ID combination in the Employee Training Entry window and the current date is after the Expiration Date.
- **Active** if the Inactive checkbox is NOT checked on the Course/Class ID combination in the Employee Training Entry window and the current date is on or before the Expiration Date.

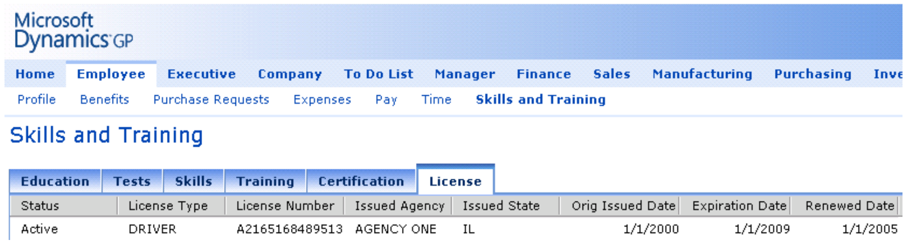
Employee Certification Tab

An Employee may use the Certification window to view their certification information as well as license and training information. To open this tab, click Employee > Skills and Training > Certification.



Status	Certification Code	Certification Number	Issued By	Orig Issued Date	Expiration Date	Renewed Date
Active	CERT1	6548987	AGENCY ONE	1/1/2004	1/1/2008	1/1/2007

Employee License Tab



Manager’s Training, Certification and License Tab

Use the Manager’s Skills and Training section to allow managers to view their teams’ training information as well as certification and license information.

Manager Training Tab

This window allows managers to view their teams’ training information. To open this window, click Manager > Skills and Training > Training.

Manager Certification Tab

This window allows managers to view their teams’ certification information. To open this window, click Manager > Skills and Training > Certification.

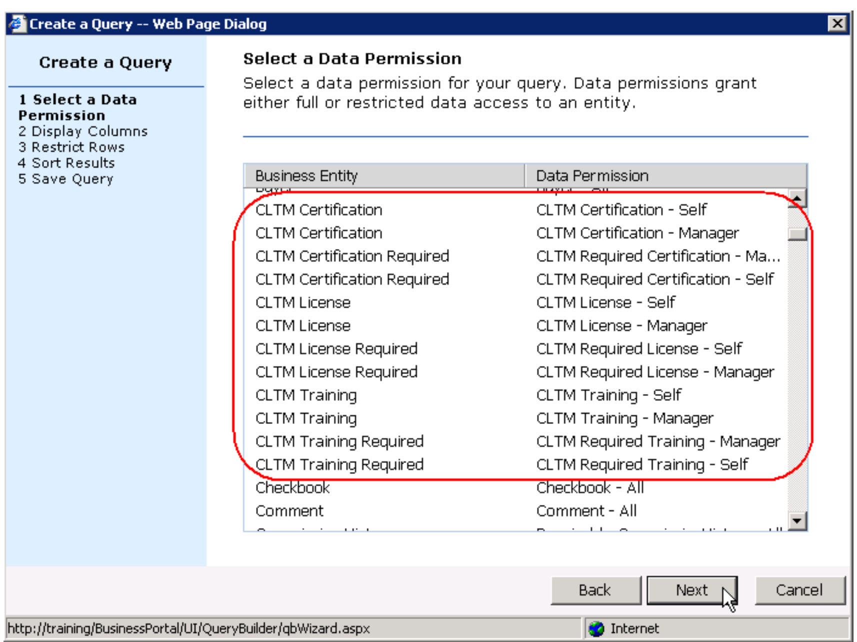
Manager License Tab

This window allows managers to view their teams’ license information. To open this window, click Manager > Skills and Training > License.

Business Entities for Manager Queries

Managers may use the following Business Entities for creating queries:

- Certification, License and Training Manager Certification – Self
- Certification, License and Training Manager Certification – Manager
- Certification, License and Training Manager Required Certification – Self
- Certification, License and Training Manager Required Certification – Manager
- Certification, License and Training Manager License – Self
- Certification, License and Training Manager License – Manager
- Certification, License and Training Manager Required License – Self
- Certification, License and Training Manager Required License – Manager
- Certification, License and Training Manager Training – Self
- Certification, License and Training Manager Training – Manager
- Certification, License and Training Manager Required Training – Self
- Certification, License and Training Manager Required Training – Manager



Column Headings Available

The new Business Entities have the same columns available as the views in the associated tabs (i.e. – Employee Training Tab).

The “Required” Business Entities also have one additional column header available – Area.

- If the current employee has payroll transactions assigned to a Position and Department combination found in the “License, Certification and Training Required by Department and Position” Training record and an associated Certification record, the Area field will be “Worked.”
- If the current employee has a Position and Department combination from Employee Maintenance record found in the “License, Certification and Training Required by Department and Position” Training record and an associated Certification record, the Area field will be “Home.”

Status Definitions for “Required” Entities

Training Required

The Status column will be populated with the following options in the Training Required Business Entities:

- “Completed” Status – This status will be in effect if all of the following conditions are true regarding classes currently assigned to a course: all classes have been assigned to the employee, all classes are completed, all classes are active, and all classes have an expiration date.
- “Expired” Status – This status will be in effect if all of the following conditions are true regarding classes currently assigned to a course: all classes have been assigned to the employee, all classes are completed, all classes are active, one or more classes assigned have an expiration date.
- “Incomplete” Status – This status will be in effect if at least one currently assigned class of a course is assigned to the employee and one or more currently assigned classes from a required course are: not assigned to the employee, or not marked completed, or marked inactive.
- “Missing Status” – This status will be in effect if none of the classes currently assigned to a required course are assigned to the employee.

Certification Required

The Status column will be populated with the following options in the Certification Required Business Entities:

- If no associated Certification record is found for the current employee, the status will be “Missing.”
- If an associated Certification record is found for the current employee and the Inactive field is marked, the status will be “Inactive.”
- If an associated Certification record is found for the current employee and is the Expired Date is less than or equal to the current date, the status will be “Expired.”
- If a record is found as defined in requirement BP07.11.03 and an associated Certification record is found for the current employee, and the Inactive fields is not marked, and the Expired Date is greater than the current date, the status will be “Active”.

License Required

The Status column will be populated with the following options in the License Required Business Entities:

- If no associated License record is found for the current employee, the status will be “Missing.”
- If an associated License record is found for the current employee and is the Inactive field is marked, the status will be “Inactive.”
- If an associated License record is found for the current employee and is the Expired Date is less than or equal to the current date, the status will be “Expired.”
- If an associated License record is found for the current employee, and the Inactive field is not marked, and the Expired Date is greater than the current date, the status will be “Active.”

Summary

Certification, License and Training Manager can be configured to work within Business Portal allowing managers and employees to view employee information. Using the Supervisor information from Dynamics GP, Business Portal allows managers to view information as it relates to their subordinates certifications, licenses and training. Employees are also able to view their own information. Managers can use Business Entities to develop queries using the data found on the Certifications, Licenses and Training windows. There is also the additional field of "Area" available.

Key points to remember from this chapter:

- Business Portal can be configured to allow managers to view their employee's data as it pertains to certifications, licenses and training using the Direct Reports View and Site Settings.
- Employees use the Training tab in Business Portal to view their personal information for certifications, licenses and training.
- The Manager's Skills and Training section allows them to view their subordinations information for certifications, licenses and training.
- Queries can be developed using Business Entities that contain all of the pertinent fields plus the added field of "Area."