

Introduction Training for HROffice - 2 hour Webex course

Setup Manager

- Introduction to the Toolbar
 - Explanation of Toolbar buttons
 - Tool Tips
- Introduction to the Menu
 - Explanation of various menu items
- Security
 - License Tab
 - Set up and explanation of Roles
 - Assigning Roles to Users
- Company Information
 - General Tab
 - Locations Tab
 - Divisions Tab
 - Departments Tab
 - Job Titles Tab
- Benefits Setup Wizard
 - Introduction to the Wizard
 - Explanation of Modify
 - Exporting/Importing a Plan
 - Ending a Plan
 - Deleting a Plan
 - Setting up a Medical Plan
 - Step by Step to creating a Medical Plan
 - Importance of Finalizing a plan
 - Setting a Bookmark
- Introduction and Explanation of the Self-Service Setup Wizard (This is an introduction only, full training is in the Advanced Class)
- Attendance Setup Wizard
 - Setting up a new leave type
 - Modifying a leave type
 - Deleting a leave type
 - Setting up FMLA
 - Changing leave unit configuration (to days or hours)
- Customization Wizard
 - Setting up new custom tab
 - Changing an existing custom tab
 - Deleting a custom tab
 - Saving and loading a custom tab template to a file
 - Loading a custom tab template from the internet

Employee Manager

- Introduction to the Toolbar
 - Explanation of Toolbar buttons
 - Tool Tips
- Introduction to the Menu
 - Explanation of various menu items
- Introduction to the Navigation Toolbar
 - Explanation of the various options available
- Employee Information
 - Personal Information Tab
 - Add or Remove Picture
 - New Employee
 - Delete Employee
 - Terminating an Employee
 - Contact Tab
 - Employment Tab
 - Terminating an Employee review
 - Job Tab
 - Setting up a Supervisor
 - Dependents Tab
 - Other Tab
 - Notes Tab
- Compensation
 - Entering compensation
 - Saving compensation to history
 - Review Wizard
 - Review Tab
 - Bonus Tab
- Benefits
 - Enrollment Tab
 - How to enroll in Benefits
 - Showing History of benefits
 - Changing a benefit
 - Viewing a benefit
 - Deleting a benefit
 - Recalculating a benefit
 - Eligibility Tab
 - Overriding Eligibility
 - Viewing Eligibility Calculations
 - Other Insurance Tab
 - Providers Tab
 - Beneficiaries Tab
 - Billing Adjustments Tab

- Attendance
 - Summary Tab
 - Starting/Stopping a leave type
 - Deleting a leave type
 - How a leave type is calculated
 - Policy of a leave type
 - Leave Taken Tab
 - Entering leave taken
 - Deleting a leave taken entry
 - Making adjustments to leave type
 - Leave Report
 - FMLA Tab
- COBRA/HIPAA
 - Overview of the COBRA section
 - Making changes
 - Sending notices
 - COBRA Election
 - COBRA Payments Tab
 - Notices Log

Applicant Manager

- Introduction to the Applicant Manager
 - Explanation of Toolbar buttons
- Applicant Reporting
- Applicant Customizations
- Hiring Applicants