

Employee Information Quick Start Guide

Section 1: Data Entry Instructions for Entering an Employee's Demographics

Step 1

First, check to see if the employee is in the system:

- Click on "EMPLOYEES" (found at the top of the *InfoServ DDSM* screen and as seen below).



- Either find the employee from the list shown in the pull-down or else search by last name or first name or by social security number and then click on "Search / Select". You do not have to enter the entire last name in order for the system to do the search.
- Note that only active employees will show up in the pull-down list. Active employees are employees whose most recent employment record has not been "terminated". In other words, a termination date has not been entered on the employee's current employment record (which is visible from the "History" link after an employee is selected).

EMPLOYEES HOME

Employee Search

Search by Name, Partial Name, or by SSN...

Last Name	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Nickname	<input type="text"/>
SSN:	<input type="text"/>

Or Select From Active Employee List....

Employee:	<input type="text" value="Choose Employee"/>
<input type="button" value="Search / Select"/>	

Click here to choose from active employees. Type in the first letter of the employee's last name. Move up and down with your mouse or arrow keys or Page Up and Page Down keys.

Search by using any of the fields above, by browsing through the listings of employees or by choosing another search method from the left toolbar. If you've moved your cursor into the "Choose Employee" field, you may type the first letter of the employee's last name you are searching for and it will go to the first one with that matching letter.

Employee Information Quick Start Guide

Step 2

If the employee's record is not in the system, add the record via the following steps:

- Click on "EMPLOYEES" (if you're not already there)
- Click on "[Add Employee](#)" under the "[Employee Mgmt](#)" menu heading on the left-hand side on the screen.



Step 3

If the employee's record is already in the system, edit their demographics via the following steps:

- Click on "EMPLOYEES" (if you're not already there)
- Search for the employee to edit (See Step 1 above to learn how to search or select an employee).
- Click on "[Edit](#)" to the right of the employee's name shown.

The Following Employee Fields are Required:

First Name

Last Name

Social Security Number

Gender (Note that you may choose "N/A" if not known at the time of entry)

Race (Note that you may choose "N/A" if not known at the time of entry)

Employee Information Quick Start Guide

Main Site	<i>(This is the main place that this employee works, or his "default" site/location.)</i>
User Group	<i>(This is used for automatically assigning system access privileges.)</i>
State	
Hire Date	<i>The Hire Date is only presented here on an "Add". On an "Edit" it is hidden. You may make edits on the hire date by going to the employee's employment history (from the "History" link to the right of the employee's name).</i>
Manager/Supervisor	

Sites from Which Employee May Work (Optional)

In addition to the employee's main (default) site, you may choose other sites from which the employee may work. This information will be used for determining which clients an employee may access records for and for use in the employee work-scheduling program.

PIN and Employee No. (Optional)

The PIN and Employee Number fields are optional and are not currently used in the system other than as a reference field. The PIN is intended to be used someday as an optional extra security measure (an extra password) for verifying your electronic signature. Employee number is a field that may match another system that you have in place, such as a time clock system.

Photo -- How to upload ("attach" or "store") a photo to the Employee's Record (Optional)

Use the "Browse..." button to search for a photograph of the employee on your computer. Most of the time, your computer will show it's "Desktop" by default. Usually, you will have stored the photo under the "My Documents" folder. Select the photo file and then click on "Open" or "Ok". The photo file's name and path should appear to the left of the "Browse" button. When you edit the employee's record in the future, you will see a "[View photograph](#)" link which you can click to see the photograph.

Employee Contact Information

Address 1	<i>This is the employee's personal address.</i>
Address 2	<i>This is a second line for use for apartment numbers for an employee's personal address.</i>
Phone 1	<i>This is the employee's DAY phone.</i>
Phone 1 Ext	<i>This is the extension for the employee's day phone.</i>
Phone 2	<i>This is the employee's Night phone (usually home phone).</i>
Phone2 Ext	<i>This is the employee's home phone extension.</i>
Email	<i>This is the employee's email address for work.</i>

Step 4

Click on "[Next](#)" at the bottom of the screen to save the information, or "[Cancel](#)" to reset it to the way it was prior to adding or editing.

"Employee with SSN Already Exists" Message

If you have entered a social security number for the employee that is already being used in the system, the system brings up an alert to insure that you make a correction to the social security number if you entered it

Employee Information Quick Start Guide

in error, or to alert you that the employee that you added may already be in the system. If this message appears, please take a moment to check to see that you have not entered an employee's record twice. If you find that you have entered an employee's record twice, be very sure that you delete the new one that you just entered, as the old one may have already been used in the system (and thusly would have "child" records that are dependent on it being there). Click on "Click here to continue".

Step 5

"Done"

After selecting "[Next](#)", you are presented with the choices of "[Done](#)" or "[Give Specific Permissions](#)". If you select "Done" you are then taken to a detailed screen of the employee's employment data.

Giving Specific Permissions -- (System Access Rights)

If you choose "[Give Specific Permissions](#)" you will be taken to a screen that appears with the employee's system access permissions listed in accordance to the default settings of the "User Group" type that was chosen for this employee. There you may "Edit Permissions" to override the default settings of that user so that the employee's permissions are customized to his/her needs.

Section 2: Entering an Individual's Employment Data

What is "Employment Data"? Employment data refers to information associated with the employment of an employee. For example, Hire Date, Background Check Date, and Abuse Registry Check Date are employment fields. (See below for a complete list of employment fields.)


- Click on "EMPLOYEES" (if you're not already there)
- Search or select the employee.
- Click on the "[History](#)" link to the far right of the employee's name and social security number.

EMPLOYEES HOME

Display Matching Employees

Employees Matching Search Criteria

Employee	Edit	Edit Username	Delete	Training	History
Smith, John (222-22-1122)	[Edit]	[Edit Username]	[Delete]	[Training]	[History]
<input type="button" value="Cancel"/>					



Employee Information Quick Start Guide

- Click on the "[Edit](#)" link to the right of the "Hired" date. Note that if the employee has been terminated, then the termination date would display where the "Hired" date displays.

Employment History

(If this employee has worked for you more than once, you can add another record of employment for this employee if you first add a termination date to the existing employment record.)

Smith, John

Hired: 03/13/2003 [\[Edit\]](#) [\[Delete\]](#) [\[Termination\]](#) [\[Discipline\]](#) [\[Training\]](#) [\[Add Position\]](#) [\[Add Bonus\]](#)

[\[Driving Record\]](#) [\[Health Items\]](#) [\[W4 Info\]](#) [\[Upload\]](#) [\[Scan\]](#)

Position(s)	Start Date	End Date	Primary?	Options
Direct Care	04/24/2002		Yes	[Edit] [Delete]

No Bonus Records on File

[\[Back to Employee Search\]](#)

Employment Fields

Employment Status	Active or Inactive
Hire Date	(REQUIRED: When was the employee hired?)
Full Time Date	(Optional: Usually equal to the hire date and start date.)
Start Date	(May be after hire date -- date they can serve individuals after training.)
Shift	(What is this employee's normal work shift?)
Reference Checks?	(Were reference checks done for this employee?)
Reference Comments	(List findings of reference checks here.)
Ref. Check by (Enter initials or name)	(Who completed the reference checks?)
Reference Check Date	
Personal Reference Check Date	
Work Reference Check Date	
Background Checks?	(Were background checks done for this employee?)
Background Comments	
Background Check Date	
Background Check By (Enter initials/name)	(Who completed the background check?)
Drug Test Date	
Drug Test Positive?	(Was the drug test positive?)
Have Title VI?	(Has the employee completed Title VI Training?)
Education Level	(A pull-down of education levels like "High School", etc.)
Education Verified	(Was the employee's education verified?)
Education Verification Notes	(Enter any comments on the employee's education here.)
Education Certifications	(List any education certifications.)
Abuse Registry Check?	(Was the abuse registry check done for this employee?)
Abuse Registry Comments	(Enter any relevant findings pertaining to the abuse registry.)
Abuse Registry Check Date	

Employee Information Quick Start Guide

Abuse Registry Check By (Enter initials/name)	
Acknowledge Handbook?	(Does this employee acknowledge the employee handbook?)
Handbook Number	(What handbook number did this employee receive?)
Direct Deposit Authorization?	(Did this employee authorize direct deposit?)
Copy of Voided Check?	(Do we have a copy of his/her voided check?)
Disability Supports Needed	(Are any disability supports needed for this employee?)
Information in Personnel File?	(Do we have a copy of SS card and driver's license on file?)
Garnishment Amount	(What is this employee's last garnishment amount?)
Garnishment Date	(What is this employee's last garnishment date?)
Pay Advance Amount	(What is this employee's last pay advance amount?)
Pay Advance Date	(What is this employee's last pay advance date?)
90-Day Evaluation Date	(When is this employee's 90-day evaluation?)
Last Annual Evaluation Date	(When was this employee's last annual evaluation date?)
Next Annual Evaluation Date	(When will this employee's next annual evaluation be?)

- Click on the "Update" button at the bottom of the screen in order to save the information entered

Section 3: Entering an Employee's Termination Date

- From the Employment History Screen, click on "[Termination](#)"
- Fill in the Termination Date and choose a termination type

Termination Fields

Termination Date	Date employee was terminated or resigned.
Termination Type	Terminated, Resigned, Retired
Termination Reason/Comments	Why was the employee terminated?
Returned Property?	Did the employee return all "company" property?
Returned Property Comments	
Hold Last Check at Administrative Office?	
Pay Out Annual Leave?	
Eligible for Rehire?	Would you re-hire the employee if the opportunity presented itself?
Eligible for Rehire Comments	
Offered COBRA?	By law, you must offer employees COBRA upon termination.
Date COBRA Offered	
Was COBRA Accepted?	
Date COBRA Accepted	

Section 4: Entering Disciplinary Action Information

- From the Employment History Screen, click on "Discipline"
- Enter the date of the employee's first disciplinary action
- Enter disciplinary action comments. These comments should include dates of action and a description of the action taken.

Employee Information Quick Start Guide

Section 5: Entering an Employee's Overall Training Options

- From the Employment History Screen, click on "Training"
- Enter whether or not the employee has been certified to give (administer) medications
- Enter any general training notes in the Training Notes field
- NOTE: Training taken is entered under the Employee Training section

Section 6: Entering an Employee's Driving Record

- From the Employment History Screen, click on "Driving"
- Enter the driving information in the fields and click on "Save" at the bottom of the screen.

Driving Record Fields

Valid Drivers License	(Is this employee's drivers license valid? Yes or No)
Drivers License Number	(Enter the employee's drivers license number.)
Drivers License Expiration Date	(When does this employee's drivers license expire?)
F-Endorsement?	(Does this employee have a current F-Endorsement?)
Auto Insurance?	(Does this employee have valid automobile insurance?)
Auto Insurance Company	(Free-form text field for entering the employee's ins. company.)
Auto Insurance Expiration Date	(When does this employee's auto insurance policy expire/renew?)
Gas Card Number	(If the employee has a "company" gas card, what is the #?)
Gas Card Expiration Date	(When is this employee's gas card expiration date?)
Have Keys?	(Does this employee have any "company" keys?)
DMV Checked?	(Have we checked employee with the Dept. of Motor Vehicles?)
DMV Approved?	(Has the Dept. of Motor Vehicles approved this employee to drive?)
Can Transport Others?	(Can the employee transport others?)
Driving Issues	(Does the employee have any driving issues? -- Free-form text)
Cleared to Drive?	(Can we clear the employee to drive? Yes/No)

Section 7: Entering an Employee's TB Skin Test(s) (Health Items)

- From the Employment History screen, click on "Health Items"
- Select the Health item type (option) -- TB Skin Test, Consent to Hep. B, Declined Hep. B, etc.
- Click on "Add Health Item"
- Enter in the Date of the test, screening, etc.
- Enter any comments (optional)
- Click on "Save"
- Add additional health item records for this employee as needed.

Section 8: Entering an Employee's W4 (Pay) Info

- From the Employment History screen, click on "W4 Info"
- Select a Filing Status (Married, Single, single withholding at higher rate)
- Enter the number of exemptions for the employee
- Enter a Withholding amount (per check)
- Click on "Update" to save the changes

Employee Information Quick Start Guide

Section 9: Uploading a Document to this Employee's Record

- This is an optional feature. Use it to attach any document or spreadsheet on an employee to his/her record so that it can be in a central location and accessible by those who need it.
- From the Employment History screen, click on "Upload"
- Click on the "Browse" button and search for the file from your computer to upload (or "attach")
- Click on "Upload File" once the file name and path appears to the right of "Locate a File"

Section 10: Scanning a Document into this Employee's Record

- This is an optional feature. Use it to attach any scanned paper document to an employee's record so that it can be in a central location and accessible by those who need it. You must have a "Twain" compliant scanner attached to your machine. (Nearly all scanners are Twain compliant.)
- From the Employment History screen, click on "Scan"
- Click on the Scanner icon to start your scanner
- Save the scanned image by giving it a unique file name

Section 11: Adding or Editing an Employee's Position/Title

- **NOTE:** Several pull-down fields displayed on this screen get their information from the "[Position Mgmt](#)" and "[Pull Down Mgmt](#)" options under "Maintenance". Your System Administrator is normally responsible for maintaining these options.
- From the Employment History screen, click on "[Add Position](#)" or find the position you wish to edit and click on the "[Edit](#)" link to the right of it.
- Select a Position type (required)
- Select a Position Type (required -- "Full Time", "Part Time", "Volunteer", "Contractor")
- Select a Department (required)
- Select whether or not this is the employee's primary position
- Start Date and End Date are optional
- Pay Rate is optional. Be sure to enter it without commas or dollar signs.
- Annual Pay Rate is optional. Do not enter commas or dollar signs for it either.
- Rate Unit describes how the Pay Rate is paid.
- "Job on File?" -- pertains to whether or not the job description for this employee in his file.
- Click on "Save" to save the information.

Section 12: Entering an Employee's Bonus (Optional)

- Some organizations are lucky enough to be able to offer employee bonuses, usually based on performance.
- If your organization needs to track bonuses, you may want to consider the format we have in [InfoServ DDSM](#), which originated with Impact Centers, Inc.
- In our format, a bonus record is added with the start and end dates defined. Then, each supervisor who deals with the employee edits the record and records whether or not the employee's requirements were met. If all requirements have been met, the Human Resource Supervisor gives the bonus and enters the amount into the system.

Employee Information Quick Start Guide

- A Quarterly Bonus would simply have start and end dates for the quarter (i.e. 1/1/2003 - 3/31/2003)
- From the Employment History screen, click on "[Add Bonus](#)"
- The most important fields on the Employment Bonus screen are:
 1. Bonus Period Start (date)
 2. Bonus Period End (date)
 3. Was Bonus Received?

Section 13: Employee Reports

In order to verify that the information you have added to the system is correct and complete, you may run a number of different reports. Experiment with the reports listed under "EMPLOYEES", "[General Reports](#)".

- Click on "EMPLOYEES" (if you're not already there).
- Click on "[General Reports](#)".
- Get an Employee list from the "[Employees Report](#)" link.
- Determine any new employees added to the system from the "[New Employees](#)" link.
- Employees with "[Next Evaluations Due](#)" within the date range you specify are found from the "New Employees" link.
- To determine whether some very key information has been entered into the system, you may choose the "[Personnel Checklist](#)".
- You may also run the "[Employees](#)" query under "EMPLOYEES", "[Queries](#)". Just click on "[Generate Report](#)" to see the default fields listed. You may change the fields displayed on the report, change the sort order, or filter the data to limit or group the information you see.