
User Reference

Human Resources v10x

By CMiC

CMiC
Computer Methods
international Corp.

Proprietary Notice

The contents of the CMiC software product, including both this manual and the program components, are proprietary to Computer Methods International Corp. (CMiC), are copyright protected and are considered Confidential Information by CMiC. All rights are reserved by CMiC. A copy of the manual and the program has been provided to the original licensee under license with CMiC strictly for their own use under the terms of the license. All copies of this manual whether in print or electronic format must contain a copy of this Proprietary Notice. Any selling, licensing or other distribution of the contents of either this manual or the program components, whether for profit or not, is unlawful and may subject the violator and the original licensee to termination of license, criminal charges, civil action, or any combination of these.

Copyright © 2017

Computer Methods International Corp.
4850 Keele Street
Toronto, Ontario M3J 3K1
Canada

Risk of Use Notice

The CMiC software product, including both this manual and the program components, is licensed on an “AS IS” basis. The entire risk as to the results of its use is with the licensee. Except in those jurisdictions which impose certain warranties by statute which may not be waived by one or more of the parties, and only to that extent, Computer Methods International Corp. (CMiC) makes no warranties whatsoever, either expressed or implied, with respect to the quality, performance, merchantability or fitness for any particular purpose of any or all components of this software product, except as provided in the licensee’s license agreement. The licensee (and not CMiC or its agents) will be solely responsible for the costs of all service, or of any defect in this software product and any incidental or consequential damages caused or alleged to be caused either directly or indirectly by the software product to the licensee or any other person, including, but not limited to, any interruption of service, or loss of business or anticipatory profits, even if CMiC has been advised of the possibility of such damages.

“Computer Methods International Corp” and “CMiC” are registered trademarks of Computer Methods International Corp. Oracle, Oracle9i™, Oracle Application Server11g™, Oracle Database 11g™, Oracle® Discoverer™ are trademarks or registered trademarks of Oracle Corporation.

Contents

- HR OVERVIEW.....1**
- THE HR MAIN MENU.....1
- MENU GROUPINGS.....2
 - Personnel – Menu*2
 - Benefits Administration – Menu*.....2
 - Applicants – Menu*2
 - Training/Certification – Menu*.....3
 - Medical – Menu*3
 - Safety – Menu*3
 - Reports – Menu*.....3
 - Utility – Menu*.....3
- PERSONNEL5**
- EMPLOYEE QUERY5
- EMPLOYEE PROFILE.....7
- EMPLOYEE HISTORY10
- EDUCATION.....10
- MEMBERSHIP12
- DOCUMENTS14
- EMPLOYEE RELATIVES16
 - Relative Relationship Codes*18
- ASSET TRACKING19
 - Items By Employee/Applicant*19
 - Items By Employee*21
 - Employees by Item*22
 - Maintain Asset Items*24
 - Asset Class Codes*26
- DISCIPLINE TRACKING26
- PERFORMANCE REVIEW27
- STAFFING INQUIRY31
- WORK HISTORY QUERY.....33
- SUITABLE POSITIONS FOR EMPLOYEES34
- BENEFIT/DEDUCTION ADMINISTRATION35**
- BENEFIT QUERY35
- BENEFITS38
 - Master Benefits*38
 - Company Benefits*39
 - Union Benefits*40
 - Employee Benefits*.....40
 - Dependent Benefits*.....41
- DEDUCTIONS42
 - Master Deductions*43
 - Company Deductions*44
 - Union Deductions*44

<i>Employee Deductions</i>	44
<i>Dependent Deductions</i>	45
MINIMUMS AND MAXIMUMS.....	46
BENEFIT AND DEDUCTION PLANS.....	47
BENEFIT AND DEDUCTION PLAN OPTIONS.....	48
BENEFIT AND DEDUCTION BASES.....	48
BENEFIT AND DEDUCTION BASE ELEMENTS.....	49
<i>Transaction Types and Codes</i>	50
<i>Example 1: Non-Taxable Life Insurance Benefit</i>	51
<i>Example 2: Taxable Life Insurance Benefit</i>	52
BENEFIT AND DEDUCTION TABLE BASE.....	53
PENSION INFORMATION.....	54
COBRA AND RECEIVABLES PARAMETERS.....	55
COBRA MAIL-MERGE.....	57
EMPLOYEE RECEIVABLES MAIL-MERGE.....	57
ELIGIBILITY ADMINISTRATION.....	59
OVERVIEW OF BENEFIT AND DEDUCTION ELIGIBILITY.....	59
ELIGIBILITY RULES.....	59
COVERAGE AREA ADMINISTRATION.....	60
ACCOUNT MAINTENANCE.....	61
BENEFIT AND DEDUCTION SETUP.....	62
<i>Master – Block</i>	62
<i>Detail – Block</i>	65
<i>Rules Detail – Block</i>	66
ELIGIBILITY ADMINISTRATION.....	68
PLAN ADMINISTRATION.....	70
APPLICANTS.....	71
APPLICANT INFORMATION.....	71
<i>Applicant Documents</i>	78
TRAINING AND CERTIFICATIONS.....	79
TRAINING COURSES AND MODULES.....	79
TRAINING BY COURSE.....	81
TRAINING BY EMPLOYEE.....	82
MAINTAIN AND SCHEDULE CLASSES.....	84
TYPES OF CERTIFICATION OR LICENSES.....	85
EMPLOYEE CERTIFICATION / LICENSES.....	86
SKILLS ACHIEVED BY CERTIFICATIONS.....	88
COURSES REQUIRED BY POSITIONS.....	89
MEDICAL.....	91
MEDICAL RESULTS BY EMPLOYEE OR APPLICANT.....	91
MEDICAL RESULTS BY TEST.....	93
MEDICAL QUERY.....	95
WORK MODIFICATIONS.....	96
<i>Print Work Modification Agreement</i>	99
ENVIRONMENTAL CONDITIONS.....	100
<i>Environmental Conditions Setup Screens</i>	100
<i>Environmental Conditions Entry</i>	101
<i>Environmental Conditions Query</i>	102
EMPLOYEE EXPOSURE REPORT.....	103
MEDICAL TEST DESCRIPTIONS.....	104
MEDICAL CHECKUP TYPES.....	105

SAFETY MENU	107
ENTERING INCIDENTS	107
<i>Incident – Tab</i>	107
<i>Classify – Tab</i>	109
<i>Description – Tab</i>	110
<i>Medical Attention – Tab</i>	111
<i>General – Tab</i>	112
<i>Liability Info, Liability Reserves, WC Reserves – Tabs (Incident Claim Reserves)</i>	113
RESERVES VERSUS ACTUAL COSTS – SETUP & PROCESSING	114
CLOSING OUT AN INCIDENT CLAIM	116
RE-OPENING AN INCIDENT CLAIM	117
SAFE HOURS BY EMPLOYEE	118
SAFE HOURS BY JOB	119
SAFE HOURS PROCESSING.....	120
<i>Check Safety Certificate Flag for HR Position</i>	121
PRINT SAFETY CERTIFICATES.....	122
RECONCILE SAFETY CERTIFICATES	123
SAFETY AUDIT BY EMPLOYEE.....	124
SAFETY CODES.....	124
<i>Contributing Factors</i>	124
<i>Treatment Types</i>	124
<i>Body Parts</i>	124
<i>Incident Types</i>	125
<i>Injury Types</i>	125
<i>Illness Types</i>	125
INCIDENT CLAIM LOCAL TABLES	125
INCIDENT CLAIM MAINTENANCE.....	126
REPORTS.....	127
REPORT MENU STRUCTURE	127
EEO REPORTS	127
<i>EEO 257 (Employee Utilization Report)</i>	127
<i>EEO 1391 (Federal Aid Contractors Annual Report)</i>	128
<i>EEO 1 (or EEO 100) Employee Status Report</i>	129
<i>VETS 100 (Veterans’ Employment Report)</i>	134
<i>EEO Classification Assignment Listing</i>	135
BENEFIT ADMINISTRATION REPORTS.....	135
SAFETY REPORTS	136
OTHER REPORTS.....	138
<i>Earnings Breakdown by Period Report</i>	138
UTILITY FUNCTIONS	141
OVERVIEW – HR UTILITIES.....	141
COPY TRADES TO POSITIONS.....	141
PROCESSING PENSION ELIGIBILITY.....	142
BENEFIT OR DEDUCTION EXPORT.....	143
YEAR-END UPDATE.....	144
PLANS CONVERSION FROM PAYROLL TO HUMAN CAPITAL.....	145
HR SETUP.....	147
CODES	147
<i>Status Codes</i>	147
<i>Disability Codes</i>	148
<i>Rating Codes</i>	149
<i>Languages</i>	150

<i>Frequency Codes</i>	151
<i>Work Modifications</i>	152
<i>Work Modification Frequencies</i>	153
<i>Membership Types</i>	154
<i>Education Course Codes</i>	155
<i>Education Degree Codes</i>	156
<i>Career Plan Codes</i>	157
<i>Performance Grades</i>	158
<i>Requisition Type</i>	159
LOCAL TABLE SETUPS	161
CONTROL FILE	161
SKILL DEFINITIONS.....	165
<i>Skills</i>	166
<i>Required Skills</i>	167
DOCUMENTS	168
<i>Documents – Document Type</i>	168
<i>Documents – Documents</i>	169
ORGANIZATIONS.....	170
POSITION/OCCUPATIONAL INFORMATION MENU	171
<i>Positions</i>	171
<i>EEO Job Site Address Information</i>	173
<i>EEO Classifications</i>	174
<i>Map Positions to EEO Classifications</i>	175
VACATION UPDATE PARAMETERS	176
REGIONS	177
REFERRAL SOURCES	178
CLASSIFIERS.....	179
<i>Global Tables</i>	180
FREQUENTLY ASKED QUESTIONS	183
BENEFITS AND DEDUCTIONS	183
APPLICANTS AND EMPLOYEES.....	183
INDEX	185

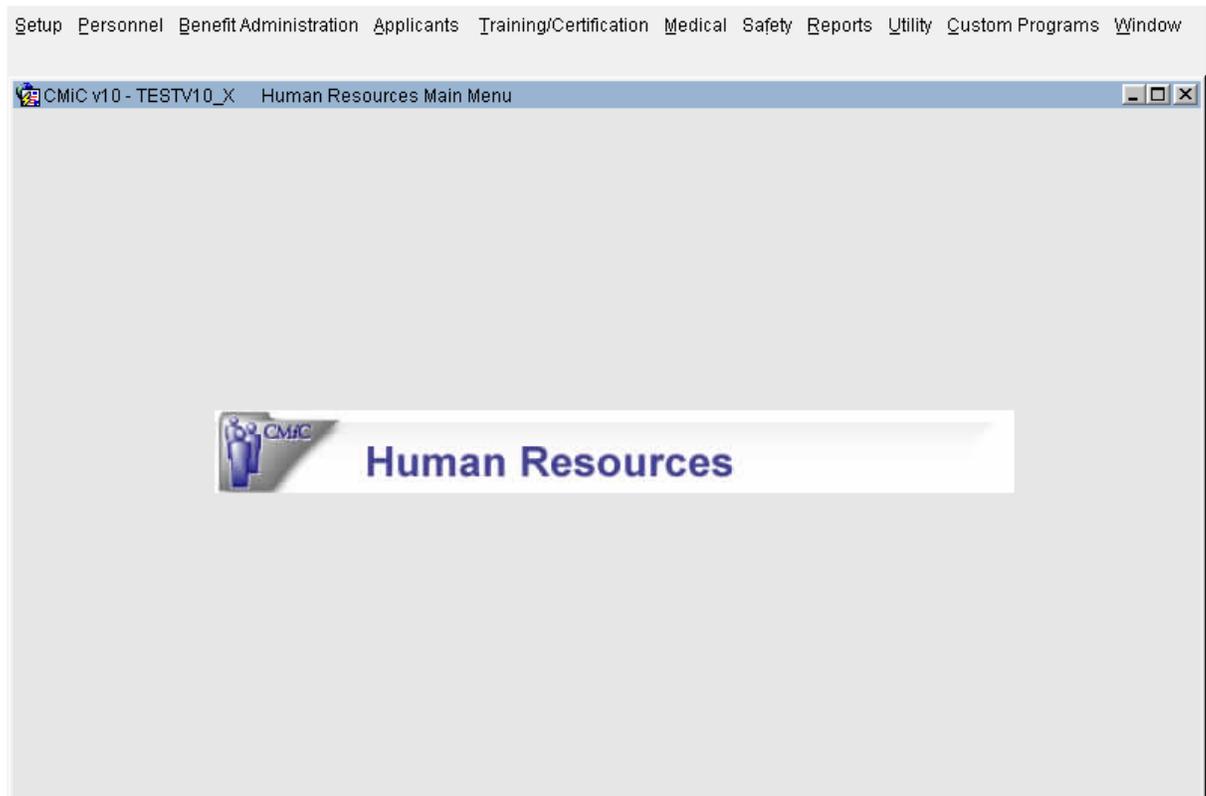
HR Overview

The HR Main Menu

The Human Resources (HR) main menu bar contains the following options:

- **Setup** – Define codes and tables of values that change infrequently.
- **Personnel** – Maintain and issue queries for information about employees.
- **Benefits Administration** – Maintain employee benefits and deductions.
- **Applicants** – Track job applicants.
- **Training/Certification**
- **Medical** – Track medical checkups and work modifications.
- **Safety** – Track incidents related to safety and manage a safety award system based on safe hours.
- **Reports** – Print, display, and/or export to a spreadsheet various reports.
- **Utility** – Various programs that are not used on a regular basis.

Menu Groupings



Pgm: HR_MNU – HR Main Menu

The Human Resource Menu options are grouped by functionality. Some menus include the setup of codes that are related to the functions contained in that menu.

Personnel – Menu

This menu is divided into 4 sections. The first section lists programs used to specify information about employees. The second section lists programs used to specify the relatives/dependants of employees. The third section is used for asset management (i.e. keeping track of equipment and supplies issued to employees.) The final section is used for ongoing management. For details, see the descriptions of the individual modules accessed by the specific menu items later in this manual.

Benefits Administration – Menu

The Benefits Administration menu contains modules used to manage benefit, deduction and pension information. Many menu items are identical to those contained in PY. However, Benefit and Deduction Administration can be performed by the application of eligibility Rules in HR, a more advanced system than that contained in PY.

Applicants – Menu

This menu is used to track job applicant information. Applicants can also be existing employees who are applying for new positions within the organization.

Training/Certification – Menu

This menu is used to define courses and the modules into which they may be broken up. It then allows employee course information to be entered either by course (i.e. enter all the employees or applicants that took or will take a course and, if appropriate, module.) or by employee (i.e. enter all courses and modules taken by a single employee or applicant.)

This menu is also used to define types of licenses and professional certifications and to specify which of these are held by each employee.

Medical – Menu

This menu is divided into 4 sections.

The first section is used to record the results of these checkups for each employee or applicant. It is possible to enter the results by employee or applicant (i.e. all results for a single person) or by checkup and test (e.g. enter the results of blood tests given to a number of employees.)

The second section is used to enter work modifications and print out agreement documents that employees and their managers can sign.

The third section is the Environmental Conditions submenu.

The last section is used to define individual medical tests and group these tests into types of checkups

Safety – Menu

The safety menu is used to enter incidents related to safety. It is also used to perform queries and maintain the record of safe hours by employee and job, and to print and track safety rewards. The lower section is used to maintain a series of codes used when entering incidents.

Reports – Menu

The reports menu is used to access all built-in reports. It is used to access a series of submenus that group related reports.

Utility – Menu

The following items are found on the utility menu:

Copy Trades to Positions is used to copy the Trades defined in Payroll to the Positions used in HR. This allows HR to use separate codes from payroll while not requiring it to. Note that until Payroll is modified to record positions in employee history, EEO reporting requires that positions be the same as trades, so this program should be used.

Processing Eligibility is used to update the checkbox that indicates which employees are eligible for pension deductions and credit. The results can be seen in the Benefit Admin > Eligibility Audit report. This utility may require some enhancement or customization for new users.

Benefit and Deduction Export is used to create a standard CSV (comma-separated variable) file containing all benefit and deduction information for one or more employees.

Year-end Update is used to update vacation days available, including rolling forward unused vacation, updating years of service if it depends on hours worked in the previous year, and updating pension eligibility. This utility may require some enhancement or customization for new users.

Plan Conversion from Payroll to Human Capital is used to convert payroll benefits/deductions (defined with a vendor at the company level) to HR benefits/deductions by applying a specified HR rule and HR eligibility table.

Personnel

Employee Query

The screenshot shows a web-based application window titled "Human Resources - TESTV10_X Employee Query". The window contains a form for selecting an employee. The form is organized into several sections:

- Employee Identification:** Employee No (CCC-WK-HR2), SSN/SIN (XXX-XX-5640), Company (CCC).
- Personal Information:** First Name (Richard), Middle, Last Name (Sherman), Sex (Male), Birth Date (JAN 01), Status (Active), Substatus (Working).
- Employment Details:** Trade (1610 Architect), Job, Union, Date in Position, Original Hire Date (01-01-2005), Latest Rehire Date (05-02-2013), Latest Layoff Date, Termination Date.
- Address and Contact:** Mailing Address (39 Fairview Road, Suite 109, Chicago, IL, US, 60609), Physical Address, Home Phone (312 555 4059), Work Phone, Home Fax, Work Fax, Cell Phone, Payer, E-mail, Last Job.
- Financial and Other:** Service Years (0), Hours YTD (128.00), Eligible for Pension, Pay Method (Check), Check Sent Home, Carry Fwd Balance, Last Paid Date (04-02-2013).

At the bottom of the form, there are buttons for "Contact", "Leaves", "Safe Hrs", "Job Sites", "Assets", "Medical", "Benefits", and "Wrk Hst".

On the right side of the window, there are sections for "User Extensions" (listing User Extension5 through 7 and More Extensions ...), "Related Screens" (listing Related Screen 2 through 7 and More Related ...), and "HR Main Menu".

Below the form, there is a search bar for "Employee Number Or Code" and a record indicator "Record: 1/1" with navigation arrows.

Pgm: HREMPQRY – HR Employee Query

This screen provides a single source for a variety of information that a human resources officer may need to know about an employee. It provides only querying and retrieval capability.

Main Employee Query Screen

The main screen shows the commonly required employee profile information along with selected other information. The following is a summary of the fields whose meaning is not immediately obvious:

SSN/SIN

Only the last 4 digits of the social security number are shown. Access may be given to a group of employees who need to see employee information (and not the employees' SSN) without altering the field security settings on the Employee Profile.

Date in Position

This is the most recent promotion date – a hidden column in the employee profile.

Payment Method

The value of this field can be one of Direct Deposit, Check, and Both. It is based on the setup defined in the Direct Deposit form in Payroll (Setup > Employee > Direct Deposit).

Job

The Job field displays information only for the Job code assigned in the Employee Profile; no information is related to jobs on which employees have entered time for work.

The buttons on this screen either cause additional information to overlay the address and phone number information at the bottom of the screen, or they call up other forms to display additional information.

Contact

The [**Contact**] button removes all overlaid information to expose the addresses and phone numbers.

Leaves

The [**Leaves**] button overlays a list showing for each leave the leave code, description, hours available, hours used, and hours remaining.

Safe Hrs

The [**Safe Hrs**] button displays in an overlay the date the last reward was issued, the hours earned toward the next reward, the total contiguous hours earned to date, and the total hours lost.

Job Sites

The [**Job Sites**] button shows a history of all of the sites at which the employee has worked.

Assets

The [**Assets**] button overlays a list of items recently permanently issued to the employee or currently on loan to the employee.

Medical

The [**Medical**] button calls up the same Medical Query screen that can be obtained using the *Medical > Medical Query* option on the Main Menu. However, when invoked from here the screen shows medical information only for the employee currently displayed.

Benefits

The [**Benefits**] button calls up the same Benefits Query screen that can be obtained using the Benefits Administration > Benefit Query option on the Main Menu. However, when invoked from here the screen shows benefits and deductions only for the employee displayed on the main Employee Query form.

Wrk Hst (Work History)

The [**Work History**] button calls up the same Work History screen that can be obtained using the Personnel > Work History Query option on the Main Menu. However, when invoked from here the screen shows employee history and performance review information only for the employee currently queried on the main form.

Employee Profile

This is the same screen that is accessed in the CMiC Payroll Application using menu option Setup > Employees > Employee Profile. Please refer to the Payroll V10X Manual for details.

The following items are required by the Human Resources application but not by Payroll.

Employee Personal Details Tab

The screenshot shows a software window titled "Payroll - TESTV10_X Employee Profile Maintenance". The "Employee Details" section is active, showing fields for Employee ID (CCC-WK-HR2) and Name (Sherman Richard). The "Personal" tab is selected, displaying fields for Last Name (Sherman), First Name (Richard), Initial, Prefix, Suffix, SSN/SIN No. (902-31-5640), Type (Hourly), Full/Part (Full-Time), Status (Active), Work Status (Working), FLSA Type (Non-Exempt), Unionized status, Union Membership Date, Union Mem. No., Position Description, Place of Birth, Date of Birth (01-01-1975), Hire Date (01-01-2005), Seniority Date, Work Days/Year, Terminate Date, Next Review Date, Hours/Year, Re Hire Date (05-02-2013), Adjusted Service Date (01-01-2005), Service/Years (0), Date Deceased, Primary Employee (CCC-WK-HR2), and Valid (Y). A "Copy Employee" button is present. On the right, there are sections for "User Extensions" (Employee 401K, Last Name, Employtab), "Related Screens" (HR Main Menu, Related Screen 2-7), and "Enter Employee Prefix".

Pgm: PYEMPLOY – Employee Profile Personal Tab

Work Status

Also called “sub-status”, this field is visible only for active employees and is used to record whether the employee is actually working (Working), on temporary layoff (Temporary Layoff), or on leave of absence (On Leave). New employees are created with work status of “Working”. Update this field using the Employee History screen.

Years of Service

This field is used to record the years of service credited to this employee. You can set it manually or the year-end program (Utility > Year-End Update) can automatically update it.

[License / Cert] Button

Clicking on this button calls up a separate screen that is used to maintain the list of licenses and certifications of the displayed employee. This is the same screen that is accessed using the Setup > Training/Certification > Employee Certification / License (except that here you must change the employee queried on the main Employee Query window to view the Certifications/Licenses for another employee).

Before you can enter anything on the screen you must have defined licenses and certifications under Setup > Training/Certification > Types of Certification / Licenses.

[Skills] Button

Clicking on this button pops up a window that is used to maintain the list of the employee’s skills. Before you can enter anything on the screen you must have defined licenses and certifications using the Setup > Local Tables > Skill Definitions > Skills screen.

HR Information Tab

Pgm: PYEMPLOY – Employee Profile HR Information

Site Address

The current job site address where the employee that you are defining is working. The address must have been set up previously within the Address Maintenance screen within the Global Tables. This field is optional here but required if you expect to obtain meaningful safety and EEO reports. There is an optional update program in Payroll that automatically sets this field based on the most recent timesheet for the employee.

Region Code

Enter the Region Code associated with the employee. This should be consistent with the employee’s job Site Address. The region code must have been set up previously within the Region Maintenance screen within the Global Tables. This field is optional here but required if you expect to obtain meaningful safety and EEO reports. There is an optional update program in payroll that automatically sets this field based on the most recent timesheet for the employee.

Disability Code

(Optional) The disability code for the employee that you are defining. The disability code must have been set up previously using the Setup > Codes > Disability Codes screen.

Ability to Travel

Check this box if the employee that you are defining can travel.

Enter the Distance

(Optional) If the above box is checked enter the maximum distance that the employee can travel.

Preferred Language

(Optional) The preferred language for the employee. The language option must have been set up previously within the Human Resources application.

System User

(Optional) A valid system user ID for the employee. This is used to set the default employee number for the supervisor giving performance reviews.

Yearly Salary

Enter the Yearly Salary amount for the employee.

Benefit Type

Select Benefit type from the following options: Full-Time, Salaried, Hourly and N/A.

Sex

Select "Male" or "Female"

Marital Status

There are 7 selection for Marital Status: Single, Married, Widowed, Divorced, Common Law, Separated, Domestic Partnership.

Ethnic Code

There are 8 selection for Ethnic Code: White, Black/African American, Hispanic/Latino, Asian, Native Hawaiian/Pacific Islander, American Indian/Alaskan Native, Two or more Race, NA.

Military Status

Select the appropriate military status for the employee that you are defining. The system allows you to select one of the following options: Not Veteran, Veteran, Disabled Veteran, Vietnam Veteran, Inactive Reserve and Ready (Drilling) Reserve.

Military Separation Date

Enter the date when employee ended the military service.

Dominant Hand

Select the dominant hand option for the employee that you are defining. The system allows you to select one of the following options: Left, Right, Ambidextrous, or Unknown.

Calculate Accrued Leave From

Select one of the dates specified on the list. The specified date will be used in the calculation of leave accrual for an employee. The options are: Re-Hire Date, Hire Date, Seniority Date and Adjusted Service Date.

Calculate Burdens From

Select one of the dates from the list. The specified date will be used to determine when to start calculation of burdens (e.g. benefits and deductions) for an employee. The options are: Re-Hire Date, Hire Date, Seniority Date and Adjusted Service Date.

Employee History

This is the same screen that is used in the CMiC Payroll application. Please refer to the Payroll manual for details.

A feature that was added to this screen specifically for HR is the popup window that is displayed when an employee is terminated (or deceases). This window is used to specify end dates for elected and overridden benefits and deductions, and appears after you commit the termination. The End Date is set to the termination date by default but it can be changed if eligibility is to continue under COBRA (Consolidated Omnibus Budget Reconciliation Act). The **[Cancel]** button on the popup cancels the setting of benefit and deduction end dates, but does not cancel the employee's termination.

Education

Human Resources - TESTV10_X Education

Company Code
Company CCC CMiC Test Construction Co Employee Applicant

Employee Detail
Employee # CCC-WK-HR2 Name Richard Sherman
SSN/SIN 902-31-5640 Status Active Sort order: Institution Year Completed

Education Detail

Institution	Course	Degree	Years Complete	Year Complete	GPA
FSU	CO	TEHCERT	2	<input checked="" type="checkbox"/> 2009	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	

Institution Name Florida State University
Course Name Technical College
Degree Name Technical Certification

Record: 0/1 ... <OSC>

User Extensions +
User Extension1
User Extension2
User Extension3
User Extension4
User Extension5
User Extension6
User Extension7
More Extensions ...

Related Screens +
HR Main Menu
Related Screen 2
Related Screen 3
Related Screen 4
Related Screen 5
Related Screen 6
Related Screen 7
More Related ...

Pgm: HREMPEDU – Employee/Applicant Education

This screen is used to record and query the education history of employees or applicants.

The *Education* screen is also accessible for applicants via a button on the *Applicants* screen. It is used to enter the educational background of an applicant.

Company Code – Block

In this block specify the company and whether you are entering/updating/querying the educational background of an employee or applicant. When called from the Personnel menu the radio button defaults to Employee, but it can be changed.

Employee Detail – Block

Although the block title does not change, when Applicant is selected in the Company Block, the label on the first field changes to “Applicant #” and the LOV selects applicants rather than employees. Only the Employee # / Applicant # field and the Sort Order radio group will accept user input.

Education Detail – Block

Enter the following information in this block:

Institution

Optionally select an educational institution that was created in *Setup > Local Tables > Organizations*.

Course/ Degree

Use the LOV to select an Education Course Code created in *Setup > Codes > Education Course Codes* and a degree created in *Setup > Codes > Educational Degree Codes*.

Years

Optional. Enter the number of years spent on the course or degree.

Completed

Check this box if the course was completed or the degree was granted. Otherwise leave it unchecked.

Year Completed

Optionally specify the year in which the employee or applicant left the course, whether complete or not.

GPA

Enter a Grade point average (format 9.99).

Institution Name, Course Name, Degree Name

Display fields for the current education record.

Membership

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Memberships

Company Code

Code Name Employee Applicant

Employee Detail

Employee # Name SSN

Membership Detail

Organization Code	Type Code	Membership No.	Start Date	Renewal Date	Renewal Cost
APEO	REGULAR	233	01-01-2008		50.00
					.00

Membership Type Organizations

Identify The Organization

Record: 2/2 ... List of Valu... <OSC>

Pgm: HREMPMEM - Memberships

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

HR Main Menu

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HREMPMEM - Memberships

Use the membership screen to record the organizations or societies to which an employee or applicant belongs. The *Memberships* screen is also accessible for applicants via a button on the *Applicants* screen.

Company Code – Block

In this block specify the company and whether you are entering/updating/querying the memberships of an employee or applicant. When called from the Personnel menu the radio button defaults to Employee, but it can be changed.

Employee Detail – Block

Although the block title does not change, when Applicant is selected in the Company Block, the label on the first field changes to “Applicant #” and the LOV contains applicants rather than employees. Only the Employee # / Applicant # field will accept user input.

Membership Detail – Block

Enter the following information in this block:

Organization Code

Required. Use the LOV to select an organization that was created in Setup > Local Tables > Organizations.

Type Code

Required. Use the LOV to select a membership type that was created in Setup > Codes > Membership Type.

Membership No.

Required (use N/A if there is none). Enter an alphanumeric membership number.

Start Date

Required. Enter the date when the employee became a member, if known. If this date is not known just enter a default date.

Renewal Date

Enter a valid date as the date when the employee must renew the membership, if applicable.

Renewal Cost

Enter the cost of the renewal. This could be used to budget for renewals when the employer pays for certain memberships. Leave as .00 if not applicable.

Membership Type, Organization

Display fields of membership type and organization for the current record (the one with the cursor).

Documents

Company

Code CCC CMI C Test Construction Co

Employee

Employee # CCC-VWK-HR2 Name Richard Sherman
SSN 902-31-5640 Status Active

Documents

Code	Document Number	Organization	Date Issued	Expiration Date	Renewal Date
CPP	23340	FSU	01-01-2012	31-12-2012	01-01-2013

Location of Paper Document
Document Name
Organization Name

Attachments

User Extensions +
User Extension1
User Extension2
User Extension3
User Extension4
User Extension5
User Extension6
User Extension7
More Extensions ...

Related Screens +
HR Main Menu
Related Screen 2
Related Screen 3
Related Screen 4
Related Screen 5
Related Screen 6
Related Screen 7
More Related ...

Enter Document Code
Record: 2/2 ... List of Valu... <OSC>

Pgm: HREMPDOC – Employee/Applicant Documents

The Documents screen is used to enter and query information about documents related to an employee or applicant. The *Documents* screen is also accessible from the *Applicants* menu.

Company – Block

In this block specify the employee (or applicant) company.

Employee – Block

The block title and the label on the first field change depending on the menu from which this screen is called up. When called from the *Personnel* menu the block title and field prompt say “Employee”; when called from the *Applicant* menu they say “Applicant”. In addition, the LOV contains either employees or applicants depending on the menu from which this was called up.

This block is used to specify the employee or applicant for whom a document is being entered, updated, or queried. Only the Employee # / Applicant # field will accept user input.

Documents – Block

Enter the following information in this block:

Code

Required. Use the LOV to select one of the document codes set up in Setup > Local Tables > Documents > Documents.

Document Number

Optional. A user-defined number or code identifying the document.

Organization

Optional. Use the LOV to select an organization code that was set up in Setup > Local Tables > Organizations. This is normally the organization issuing the document.

Date Issued

Optional. Enter the date when the document was issued, if known.

Expiration Date

If the document has a limited validity, enter the date it expires here.

Renewal Date

If the document must be renewed, enter the date when this must be done.

Location of Paper Document

Optional. Enter a free text description of the location of a paper copy of the document.

Document Name

Display only. This is the name associated with the code in the current row in the table.

Organization Name

Display only. This is the name associated with the organization code in the current row in the table.

[Attachment] – Button

Clicking on the **[Attachment]** button will open a dialog allowing the user to upload electronic copies of the documents for storage and retrieval. For more information, see the Addendum on 'Attachments'.

Employee Relatives

Record: 0/1 ... <OSC>

Pgm: HREMPREL – Employee Relatives

This program is used to enter information about an employee’s relatives, for the purposes of assigning eligible benefits and deductions.

Note that the benefit and deduction enrollment programs (HRDEPBEN, HRDEPDED) in the Benefits Administration menu contain fields which can be used to input required information about relatives. These programs are also available from the Employee Benefits and Employee Deduction programs via a button called **[Enroll Dependents]**.

Employee – Block

The form opens in query mode in this block. Enter any of the employee number, last name, first name, or SSN of the employee for which you wish to enter dependent information. LOVs are available on the employee number, last name, and SSN fields.

Relative – Block

Enter the last, first, and middle name of the relative. All of these fields are system optional, although this will be required information for the company benefit provider.

Address – Tab

Enter the relative's address, including references to the country, state, county, and city (maintained in Payroll Setup > Local Maintenance > Geographies > Countries|States|Counties|Cities). All the fields on this tab are optional but may be required by the company benefit provider.

Contact Info. – Tab

Enter phone, fax, pager numbers and an e-mail address on this tab. All of these fields are optional.

Personal Info. – Tab

Male/Female

Specify the relative's sex using this radio group.

Place of Birth

Optional. Free text field for entering the place of birth.

Date of Birth

Specify a date of birth with a four digit year format. Although this field is optional, it may be required by the company benefit provider for eligibility determination, and particularly for determining benefit/deduction eligibility or calculation using the Spouse Age table base.

Working As

Optional. If the relative is also an employee select his or her employee number from the LOV in this field. The first and last name of the employee appears in the display fields to the right of the selection.

Relationship

Optional. Enter or select a relationship code created in *Personnel > Relative Relationship Codes*. If using the Spouse Age table base, the relationship code with relation type Spouse must be entered for the employee whose benefit/deduction will be determined.

Priority

Not currently used. You can attach whatever meaning is convenient to this field, for example the priority for contacting in case of an accident.

Emergency Contact

Not currently used.

SSN / SIN

Enter the relative's Social Security Code (US residents) or Social Insurance Number (Canadian residents.) The prompt and format depend on the country code set on the address tab.

Benefits – Block

The fields contained on this tab will determine the eligibility of the employee's relative for certain benefits and deductions. The provisions of a company's benefit provider will determine who is eligible and hence how benefits and deductions are set up. See Benefit Administration > Benefits submenu items and Benefit Administration > Deductions submenu items for more information.

Relative Relationship Codes

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Relative Relationship Codes

Relative Relationship

Code	Description	Short Description	Relation
BROTHER	Brother	Brother	Others
CHILD	Child	Child	Child
FATHER	Father	Father	Others
MOTHER	Mother	Mother	Others
SISTER	Sister	Sister	Others

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

HR Main Menu

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Identify The Relation

Record: 1/5 ... <OSC>

Pgm: HRRELATN – Relative Relation Codes

These codes are used to specify the type of relationship between an employee and a relative. This screen is used to specify the relationship codes that can be used to classify relatives on the Personal Info tab of *Employee Relatives*.

Select *Child* from the drop-down list if the code denotes an employee-child relationship. This is used to determine whether or not an end date is automatically set for dependent benefits and deductions, based on the age of the dependent. Select *Spouse* if the code denotes an employee-spouse relationship. This is used in HR eligibility and benefit /deduction calculation based on the Spouse Age table bases.

Code

Enter a code to be used to identify this type of Relative.

Description / Short Description

Enter a description for this relative type.

Child

Identify if this type of relative qualifies as a Child, Spouse or Other.

Asset Tracking

This submenu contains the following 5 menu items:

- Items Issued to Employee – Record and display all of the items issued to a single employee.
- Items By Employee – Record and display all items assigned to a particular employee.
- Employees by Item – Record and display all of the employees who have been issued a particular kind of item.
- Maintain Asset Items – Maintain the master list of items that may be permanently issued or loaned to employees.
- Asset Class Codes – Maintain a set of codes that can be used to classify items issued to employees for reporting purposes.

Items By Employee/Applicant

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Items by Employee/Applicant

Company
 Code CCC CMIC Test Construction Co Employee Applicant

Select Employee
 Employee CCC-WK-HR2 Name Richard Sherman
 SSN XXX-XX-5640 Status Active Substatus Working
 Trade 1610 Architect
 Site Address

Items Issued to Employee

Comp	Item Code	Date Issued	Site Address	Qty	Loan	Expected Return Date	Actual Return Date	Exp. Life	Comment
CCC	CELLPHONE	01-01-2013	CCC1	1.00	<input checked="" type="checkbox"/>	31-12-2013		24	On loan
					<input checked="" type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				
					<input type="checkbox"/>				

Item Name Site Name

Record: 2/2 ... List of Valu... <OSC>

Pgm: HREMPITM – Items Issued to Employees

This program is used to record and display issued items grouped by employee. Items can include Fixed Assets, Inventory Items, Preventive Maintenance Items, or other items defined solely within HR. Assets can be assigned to an employee regardless of the company the asset is assigned to.

Company – Block

Select the company and whether you want to enter items for an employee or an applicant who has been hired but for whom no employee record yet exists. If you enter the information for an applicant it will later be available for them as an employee because the applicant number becomes the employee number.

Select Employee – Block

Select either the employee or applicant for whom you want to enter or view issued items. You can select using a LOV in the Employee/Applicant code field or by issuing a query on any of the enterable fields in this block (e.g. by name.) Only applicants with an Application Status of “Application Pending” may be specified here.

Items Issued to Employee – Block

Enter and view the items issued to the employee in this block. The meanings of the columns are described below.

Item Code

An asset item code selected from an LOV or typed in. Only asset codes defined using the Personnel > Asset Tracking > Maintain Asset Items may be entered. The name or description of the item in the current row is displayed at the bottom of the block.

Date Issued

The date the item was issued to the employee.

Site Address

The job site at which the item was issued. This column defaults to the employee’s current site address but it may be changed. Only address codes defined in the global Address table may be entered. The name of the site address in the current row is displayed at the bottom of the block.

Quantity

The quantity issued in the default unit of measurement specified for this item when it was defined.

Loan

Check this box if the item is on loan and leave it unchecked if it is a permanent issue.

Expected Return Date

For loans only, enter the date that the item is expected to be returned by.

Actual Return Date

For loans only, enter the date the item was returned.

Exp. Life

(Expected Life) Display only. This is the number of months that the item is expected to last. Its main purpose is to determine when a permanent issue may be repeated without penalty. Defined in Personnel > Asset Tracking > Maintain Asset Items.

Comment

Add any additional relevant information.

Employees by Item

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Employees Receiving Items

Company

Code CCC CMIc Test Construction Co

Select Asset

Asset Item Code CELLPHONE Cell phone Expected Life in Months 24

Issued to Employees

Employee Number	Date Issued	Site Address	Qty	Loan	Expected Return Date	Actual Return Date	Comment
CCC-WK-HR2	01-01-2013	CCC1	1.00	<input checked="" type="checkbox"/>	31-12-2013		On loan
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			
				<input type="checkbox"/>			

Name Richard Sherman
 SSN/SIN XXX-XX-5640 Status Active Substatus Working
 Trade 1610 Architect
 Site Address

Date The Item Was Issued

Record: 1/1 <OSC>

User Extensions +
 User Extension1
 User Extension2
 User Extension3
 User Extension4
 User Extension5
 User Extension6
 User Extension7
 More Extensions ...

Related Screens +
 Related Screen 1
 Related Screen 2
 Related Screen 3
 Related Screen 4
 Related Screen 5
 Related Screen 6
 Related Screen 7
 More Related ...

Pgm: HRITMEMP – Employees by Item

This program displays the same information as HREMPITM except that it groups information by item code rather than by employee.

Company – Block

Select the company and whether you want to enter items for an employee or an applicant who has been hired but for whom no employee record yet exists. If you enter the information for an applicant it will later be available for him as an employee because the applicant number becomes the employee number.

Select Asset – Block

Select the item for which you want to enter or view the employees who were issued this item. You can select using a LOV in the *Asset Item Code* field or by issuing a query on either the item code or description.

Issued to Employees – Block

Enter and view the employees to whom this item was issued in this block. The meanings of the columns are described below.

Employee Number

An employee number selected from an LOV or typed in. Only valid employee numbers or *pending* applicant numbers may be entered. Detailed information about the employee or applicant specified in the current row is displayed at the bottom of the block.

Date Issued

The date the item was issued to the employee.

Site Address

The job site at which the item was issued. This column defaults to the employee's current site address (as on the Employee Profile HR Info tab) but may be changed. Only Address Codes from the global Address table may be entered. The name of the site address in the current row is displayed at the bottom of the block.

Quant

The quantity issued in the default unit of measurement specified for this item when it was defined.

Loan

Check this box if the item is on loan and leave it unchecked if it is a permanent issue.

Expected Return Date

For loans only, enter the date that you expect the item to be returned.

Actual Return Date

For loans only, enter the date the item was returned.

Exp. Life

Display only. This is the number of months that the item is expected to last (defined in Maintain Asset Items). Its main purpose is to determine when a permanent issue may be repeated without penalty.

Comment

Any additional information.

Maintain Asset Items

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Assets Issued to Employees

Company

Company CCC CMIC Test Construction Co

Assets

Asset Item Code CELLPHONE

Item Type Other

Referenced Item Code

Description Cell phone

Item Class CELL-PH Cellular Phone

Unit of Measurement EA Each

Expected Life in Months 24

Unit Value 200.00

Fine 20.00

Bar Code 987112

Active

User Extensions +

User Extension1
User Extension2
User Extension3
User Extension4
User Extension5
User Extension6
User Extension7
More Extensions ...

Related Screens +

Related Screen 1
Related Screen 2
Related Screen 3
Related Screen 4
Related Screen 5
Related Screen 6
Related Screen 7
More Related ...

Code Used In Issuing The Item

Record: 1/1 ... <OSC>

Pgm: HRASSETS – Asset Items Maintenance

This program is used to maintain the master list of items that may be issued to employees. These items may be associated with inventory items, fixed assets, maintenance tools, and equipment in other Enterprise modules or they may be unique to the HR application.

Company – Block

Select the company to which this item belongs.

Assets – Block

Asset Item Code

An alphanumeric code of up to 10 characters. Combined with the company code this uniquely defines the item.

Item Type

Choose one of the following options from the pop-list:

- Fixed Asset – an asset from the Fixed Asset (FA) application
- Inventory Item – an item from the Inventory (CI) application.
- PRM Tool – a tool from the Preventive Maintenance (PRM) application.

- Equipment – a piece of equipment from the Equipment Costing (EM) application.
- Other – The item is defined only in HR.

Referenced Item Code

If the item type is anything but *Other*, specify the item code in the other application by selecting from an LOV. This field is not enterable if item type is *Other*.

Description

If the item type is not *Other* this defaults to the name or description of the referenced item, but can be overridden. If the item type is *Other*, enter a name or description here.

Item Class

Optional. Select an asset class that has been previously defined using the *Personnel > Asset Tracking > Asset Class Codes* option.

Unit of Measurement

Select a weight and measure code from the global Weights and Measures table.

Expected Life in Months

Specify the number of months you expect one of these items to last. This is intended to provide an indication of when it is okay to reissue the item without penalizing the employee.

Unit Value

The value of the item.

Fine

The fine to be levied for loss of loaned items or premature replacement of permanently issued items.

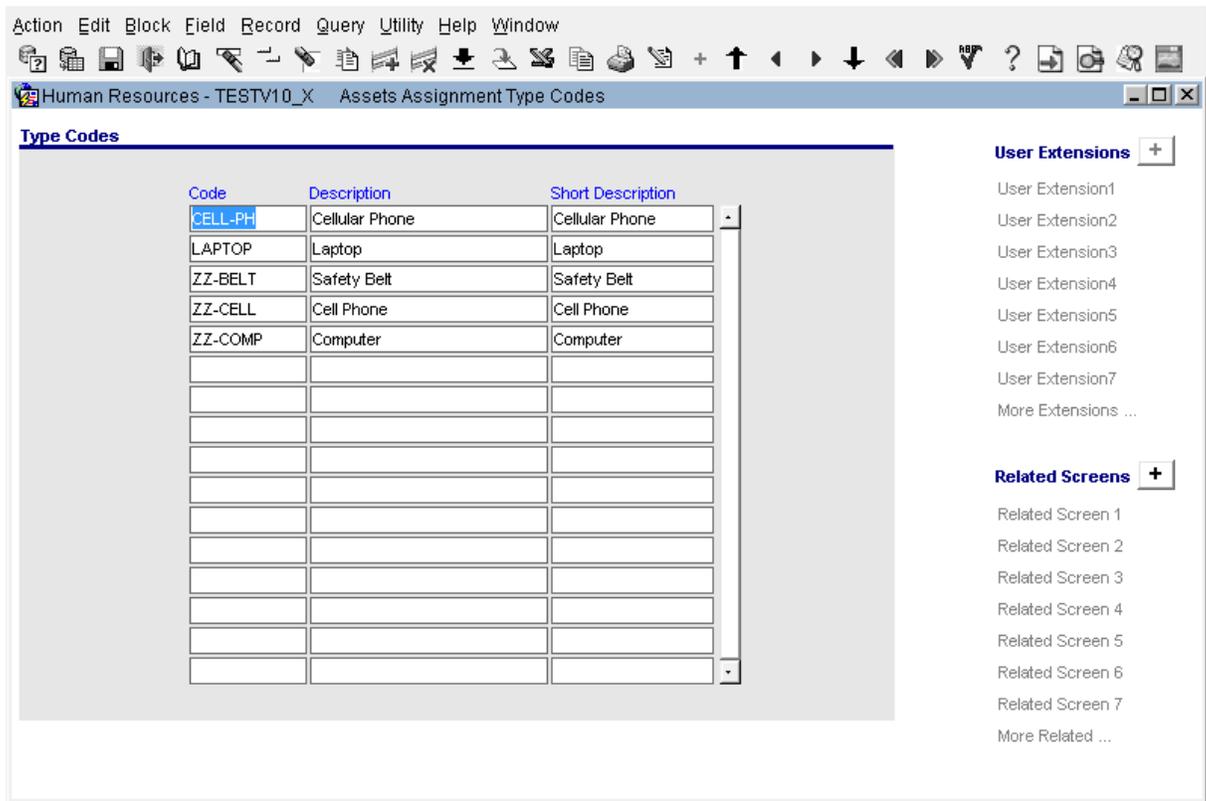
Bar Code

Currently, memo only. A UPC bar code used to identify this kind of item. Note that it is not a serial number since all items of this kind share the same code.

Active

This defaults to Active (checked). If you uncheck this field, the item will no longer appear in the list of values used when issuing items.

Asset Class Codes



Pgm: HRISUTYP – Asset Classification Codes

This screen is used to maintain codes that may be used to classify items. These codes are available to all companies.

Discipline Tracking

This screen is used for tracking disciplinary action taken against an employee: HR > Personnel > Employee Discipline.

All fields are mandatory.

The Closed Date is calculated as the Effective Date + 365 days.

Note that there are no reports provided with this function and it is for use in HR Forms only for entry and query purposes only.

Performance Review

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Performance Reviews

Company

Company CCC CMIC Test Construction Co Active Employees

Employee

Emp No CCC-WK-HR2 Name Richard Sherman

SSN / SIN 902315640 Employee Type Hourly

Job Title Position

Dept 00 Company Level Years of Service 0

Date Hired 01-01-2005 Date Re-Hired 05-02-2013 Planned Review Date

Review Career

Review Date 01-01-2013 Next Review Date 02-01-2014

Evaluated as Position B117 Heavy Equip Mechanic

Address Company CCC Site Address CCC1 CCC1 Address

Reviewed By CCC-WK-HR1 Isabella Lincoln

Achievements Richard has lower equipment down time by 22%

Strengths Richard hs shown great attention to details and is very task oriented

Areas of Improvements Richard needs to place more emphasize on team work

Grade B Above Average

User Extensions +

User Extension1

User Extension2

User Extension3

User Extension4

User Extension5

User Extension6

User Extension7

More Extensions ...

Related Screens +

Related Screen 1

Related Screen 2

Related Screen 3

Related Screen 4

Related Screen 5

Related Screen 6

Related Screen 7

More Related ...

Enter Review Date

Record: 1/1 <OSC>

This screen is used to record the results of employee performance reviews.

Company – Block

This block specifies the employee company and whether you want to filter the employee selection to active employees only. You would normally restrict it to active employees, but you would remove the check from the *Active Employees* box if you want to query historical information on an inactive employee.

Employee – Block

The upper part of this block is query only, used to locate and identify the correct employee to be reviewed. This is the only program where the planned review date is available.

The review information is maintained on the two tabs. There may be several records for each employee (i.e. one for each review that has been performed) distinguished by the review date.

Review – Tab

The screenshot shows a software interface for performance reviews. At the top, there is a menu bar with options like 'Action', 'Edit', 'Block', 'Field', 'Record', 'Query', 'Utility', 'Help', and 'Window'. Below the menu is a toolbar with various icons. The main window title is 'Human Resources - TESTV10_X Performance Reviews'. The form is divided into several sections: 'Company' (with fields for Company, CMIC Test Construction Co, and Active Employees), 'Employee' (with fields for Emp No, Name, SSN, Job Title, Dept, Date Hired, etc.), 'Review' (with fields for Review Date, Next Review Date, Evaluated as Position, etc.), and 'Career' (with fields for Career Date, Next Career Date, etc.). There are also sections for 'User Extensions' and 'Related Screens' on the right side. The bottom of the window shows 'Enter Review Date' and 'Record: 1/1'.

Pgm: HRPERF – Performance Review

Review Date

Required. The date the review was carried out. It defaults to today's date.

Evaluated as Position

Optional. The position currently occupied by the employee being reviewed.

Site Address

Optional. The address code of the job site where the review was carried out, or the site the employee was working at the time of the review.

Reviewed By

Required. The employee who carried out the review. If the information is on file this defaults to the employee having the User Id to which the current session belongs. However, this can be overridden by typing in another employee number or by selecting it from the LOV.

Achievements

Required. A free form description of the reviewed employee's achievements.

Strengths

Required. A free form description of the reviewed employee's strengths.

Areas of Improvement

Required. A free form description of areas where the reviewed employee needs to show improvement.

Grade code and meaning

Required. Select the letter grade from a list of values. The grades and their meanings are user-defined in the Setup > Codes > Performance Grades program.

Next Review Date

Optional. If this is specified it is used to update the Employee's planned review date when the review is committed. However, you will have to re-query the Employee Block to see it.

Career – Tab

The screenshot shows the 'Career' tab in the HRPERF Performance Reviews application. The interface includes a menu bar (Action, Edit, Block, Field, Record, Query, Utility, Help, Window) and a toolbar with various icons. The main window title is 'Human Resources - TESTV10_X Performance Reviews'. The 'Company' section shows 'Company CCC CMIC Test Construction Co' and a checked 'Active Employees' box. The 'Employee' section contains fields for Emp No (CCC-WK-HR2), Name (Richard Sherman), SSN / SIN (902315640), Employee Type (Hourly), Job Title, Position, Dept (00), Company Level, Years of Service (0), Date Hired (01-01-2005), Date Re-Hired (05-02-2013), and Planned Review Date. Below these are tabs for 'Review' and 'Career'. The 'Career' tab is active, showing a 'Career Development Plan' dropdown with the text 'Looking to become head mechanic when time is right.', a 'Career Plan' dropdown, 'Objectives' dropdown, 'Desired Position' dropdown, 'Recommend Position' (6117 Heavy Equip Mechanic) with a 'Find Suitable Position' button, 'Requested Pay' and 'Offered Pay' fields (both .00), and 'Effective Date' (01-01-2013). On the right side, there are sections for 'User Extensions' (User Extension1-7, More Extensions...) and 'Related Screens' (Related Screen 1-7, More Related...). At the bottom, a status bar indicates 'Enter The Career Development Plan For The Employee' and 'Record: 1/1 <OSC>'.

Pgm: HRPERF – Performance Review Career Tab

Career Development Plan

Required. A free form description of career development goals agreed to by the reviewer and the employee being reviewed.

Career Plan

Required. A code defined in the Setup > Codes > Career Plan Codes screen.

Objectives

Optional. Any relevant objectives that the employee has.

Desired / Recommended Positions

Optional. Select using an LOV a position that the employee or reviewer believes the employee should be working in.

Requested Pay

Optional. Enter a new pay rate as requested by the employee being reviewed.

Offered Pay

Optional. Enter a new pay rate that the reviewer is approving.

Effective Date

Optional unless Offered Pay has been specified, in which case it is mandatory. The date a pay increase or change in position takes effect.

Reason Code

Hidden unless Offered Pay has been entered, in which case it is visible and required. The Reason Code will be incorporated into a new Employee History record that specifies this pay increase. The codes are defined in Setup > Global Tables > Text Type and Setup > Global Tables > Text Code, with the Text Type entered into the Payroll control program (Setup > Company > Control /General /Text Type).

When a change in pay has been specified here (Offered Pay > 0) committing the record results in records being added to the employee history and employee pay rates tables to record the change.

The **[Find Suitable Positions]** button is used to search automatically for suitable positions based on the employee's skills and the skills required for position. Clicking on this button brings up a popup window in which all positions for which the employee is suited are listed in order of suitability.

You can select the position that you want to recommend by moving the cursor to the line containing that position and then clicking on the **[Select Position]** button. This closes the window and fills the selected position into the *Recommended Position* field on the main screen. To close the window without selecting any of the displayed positions (or if there are no positions displayed) click on the **[Close]** button.

For this popup to contain any information it is necessary to have previously set up the following information:

- Using Setup > Local Tables > Skills > Skill Requirements specify for each skill the positions for which it is required or desired. The rank column is used to indicate how important each skill is to a position.
- On the Personnel > Employee Profile screen click the **[Skills]** button on the Personal tab to open the popup window in which the employee's skills can be entered. The rank column is used to specify how qualified the employee is in that skill or how important it is to him or her to use that skill.

Staffing Inquiry

Specify A ZIP Code.

Record: 1/1 ... <OSC>

Pgm: HRSTAFF – Staffing Inquiry

This is used to find employees or applicants that meet specific requirements, when seeking to fill a position.

Search Criteria – Block

Enter into this block the unique criteria that must be matched by employees and/or applicants. Any text and number field except Company can be left blank to match all employees. It is not possible to match more than one value of each of these criteria at a time. These criteria are saved by user between searches and between uses of this screen, so you can come back later and make changes to a previously specified query.

Popup Criteria Windows

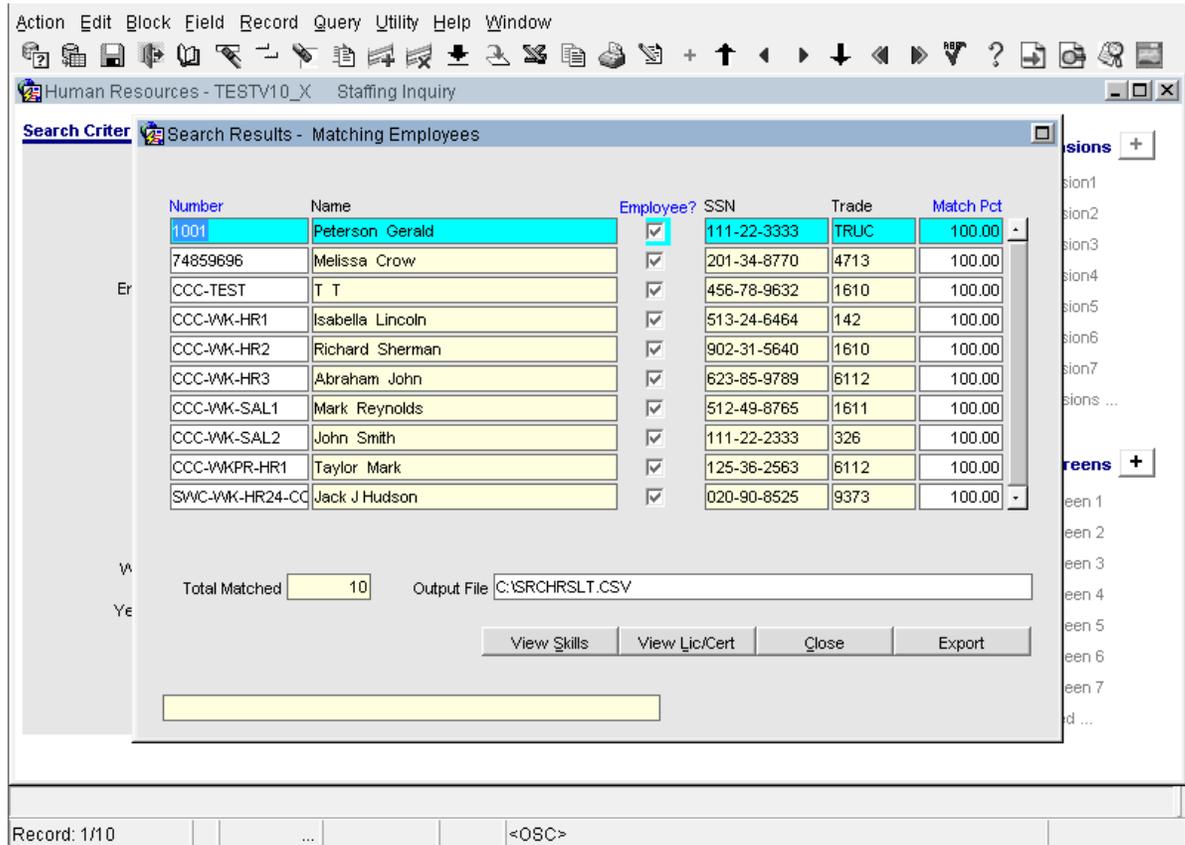
For Trades, Skills, and Licenses and Certifications it is possible to specify several different values, any one of which will result in a match. To enter these it is necessary to click on one of the buttons at the bottom to access a popup window in which you can enter a list of possible values. If such a list has been entered, the number of items in that list is shown within brackets on the corresponding button on the main window.

These multiple-choice criteria are also saved by user between sessions.

Other Buttons

The [Clear] button is used to reset the search criteria for a new search.

The **[Search]** button initiates the search. This results in the display of a popup window listing all employees matching the specified criteria.



Pgm: HRSTAFF – Staffing Inquiry – Results Display

Except for the Output File field, all fields on this window are display only. The columns in the table have the following meanings for each record:

Number

The employee or applicant number.

Name

The employee or applicant name.

Employee?

Checked, if this record represents an employee.

SSN

The Social Security Number of the matched employee or applicant.

Trade

The trade of a matched employee or applicant.

Match Pct

This column indicates how well the employee or applicant matched the specified skills and licenses and certifications. The percentage represents the number of skills, etc. possessed by the employee divided by

the total number that were specified on the popup. The list is sorted in descending order based on this column.

The four buttons on this window do the following.

- The **[View Skills]** button pops up a window displaying the skills possessed by the currently selected employee or applicant
- The **[View Lic/Cert]** button pops up a window displaying the licenses and certifications possessed by the currently selected employee or applicant.
- The **[Close]** button closes this window so you can modify the query or enter a new one.
- The **[Export]** button creates a CSV (comma separated variable) file containing more detailed information about the employees that were matched. This information is written to the file specified in the Output File field. Note that the export may take a significant amount of time to complete because it is pulling together and summarizing information from a variety of sources. If you just want to see a few pieces of information or information about a few of the employees found you might be better off using one of the other forms in HR or Payroll. This is especially true if your search matched a large number of employees.

Work History Query

Select Employee

Employee No: CCC-WK-HR2 SSN: XXX-XX-5640 Company: CCC
 First Name: Richard Middle: Last Name: Sherman

Position and Pay Rates

Action	Effective Date	Reason Code	Reason	Trade Code	Trade Description	Rate Type	Rate
New Hire	01-01-2005			1610	Architect	H	25.000
Terminated	04-02-2013	TERM	Termination	1610	Architect	H	50.000
Re-hire	05-02-2013			1610	Architect	H	50.000
Increment	05-02-2013	PR	Promotion	1610	Architect	H	52.000
Increment	05-02-2013	PR	Promotion	1610	Architect	H	52.000

Performance Reviews

Review Date	Reviewer	Name of Reviewer	Rating	Plan	Career Plan Description
01-01-2013	CCC-WK-HR1	Isabella Lincoln	B		

Enter Employee Number

Record: 1/1 ... <OSC>

Pgm: HRWRKQRY – Work History Query

This program is used to view a summary of employees' promotion/pay increase history and performance reviews. This screen is generally given a higher level of security than the Employee Query because it shows pay rates and confidential performance review information.

Benefit/Deduction Administration

Benefit Query

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Benefits and Deductions Query

Select Employee

Employee No: CCC-WK-HR2 SSN: XXX-XX-5640 Company: CCC
 First Name: Richard Middle: Last Name: Sherman
 Status: Active Substatus: Working Type: Hourly
 Pay Group: HR Address Company: CCC Site Address: CCC1

Effective Date

Effective Date: 13-09-2013 Company: CCC Year: 2013 Period: 37
 Pay Group Override: Pay Run: CCCW From: 10-09-2013 To: 16-09-2013

Benefits and Deductions

Type	Code	Elect	Plan Code	Effective Date	Employer Contributn	Employee Premium	Target Amount	End Date
B	MED	Y	DEFAULT	01-01-2012	120.00	0.00		
B	PEN	Y	DEFAULT	01-01-2011	2,600.00	0.00		31-12-2025
D	LIFE	Y	DEFAULT	01-01-2012	20.00	25.00		
B	CAR	O	DEFAULT	01-01-2010	0.00	0.00		
B	DENT	O	DEFAULT	01-01-2010	25.00	0.00		
B	PEN	O	DEFAULT	01-01-2011	2,600.00	0.00		31-12-2025
D	401K	O	DEFAULT	01-01-2011	7.50	520.00		31-12-2015
B	EDF	N	DEFAULT		265.00	0.00		31-12-2014
Description: Medical Benefits					5,649.25	545.00		

Enter Employee Number

Record: 1/1 ... <OSC>

User Extensions +
 User Extension1
 User Extension2
 User Extension3
 User Extension4
 User Extension5
 User Extension6
 User Extension7
 More Extensions ...

Related Screens +
 Related Screen 1
 Related Screen 2
 Related Screen 3
 Related Screen 4
 Related Screen 5
 Related Screen 6
 Related Screen 7
 More Related ...

Pgm: HRBENQRY – Benefits Query

This screen provides a summary of the benefits and deductions in effect on a specified date for an employee. It shows both default (company-level) and elected (employee-level) benefits and deductions. Note that the Benefits and Deductions block provides a summary of Percent, Lump Sum and Hourly Type of Benefits and Deductions. In the above example, the first line of the Employer Contribution represents a dollar amount for a Benefit of type Lump Sum; on the second line the Employer Contribution represents a percentage that matches the employee’s contribution to a Deduction of type Percent.

Select Employee – Block

Perform a query to select one or more employees. The query can be based on any of the displayed fields except for SSN.

Effective Date – Block

The *Effective Date* defaults to today's date but may be overridden. The display-only fields show the employee's company and pay run in effect on that date. The benefits and deductions shown in the next block depend on these as well as the pay group.

If you do not enter anything in the *Pay Group Override* field the employee's pay group on the effective date will be used in retrieving the benefits and deductions. However, you can enter another pay group code if you want to see what the benefits and deductions would be with a different pay group (e.g. after the employee meets minimum hours worked requirements.)

Benefits and Deductions – Block

This block shows the following information.

Type

D for Deduction and **B** for Benefit.

Code

The benefit or deduction code.

Elect

Y for employee elections, N for a benefit or deduction inherited from the company level, O for a benefit or deduction defined at the company level but overridden at the employee level.

Plan Code

The plan code for this instance of the benefit or deduction.

Effective Date

For elected and overridden benefits and deductions only, this is the date specified at the employee level.

Employer Contribution

For deductions this is the employer contribution; for benefits it is the amount of the benefit.

Employee Premium

For deductions this is the employee's contribution; it is not applicable to benefits.

Target Amount

For deductions such as spending accounts and garnishments this is the amount that must be repaid by the employee. It is not applicable to benefits.

End Date

The planned end date for a benefit or deduction that is currently in effect. If the end date has passed, the benefit or deduction will not appear in this list.

These records are ordered so that all elected benefits and deductions come first, followed by all overridden benefits and deductions, and then all inherited benefits and deductions. Within these groupings benefits precede deductions. Benefits and deductions are ordered by their codes.

Benefits and deductions do not appear in this list if:

- their amounts are all zero, or
- the print box for the benefit or deduction has been left unchecked at the company level (see [Company Benefits](#) and [Company Deductions](#)) for all entries with matching company, pay group, and pay run. If this box is checked for even one effective date range or plan/option selection the benefit or deduction will appear.

Benefits

Use this submenu to set up benefits. The options for Master Benefits, Company Benefits, Union Benefits, and Employee Benefits are the same as in the Payroll Application. For an alternative method of handling Benefits and Deductions, see Eligibility Administration.

Master Benefits

Pgm: PYBENFIT – Master Benefits

This is the same screen as can be accessed from Payroll menu item Administration > Benefits > Master. All benefits available to any company on the system must be defined here. See the Payroll manual for details. The **Dependent Enrollment Allowed** checkbox is used to indicate that this benefit is available to qualified

dependents. For example, you might check this box for medical benefits (depending on the provisions of the benefit provider), but not for car allowances or bonuses.

Company Benefits

Pgm: PYCOMBEN – Company Benefits

This is the same screen as can be accessed from Payroll menu option Administration > Benefits > Company.

Action Edit Block Field Record Query Utility Help Window

Payroll - TESTV10_X Company Benefits Maintenance

Select Company

Company	CCC	CMIC Test Construction Co
Pay Group	NONE	No Groups
Pay Run	CCCW	CCC Weekly Pay Run

Benefit Details

Basic Pay Frequency Advanced

Base Code

Eligible Base **Base Wage**

Eligible Amount

Benefits Print Flag

Benefits Secure Flag

Calculate Only On First Check

Benefit **MED** **Medical Benefits**

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Select A Required Eligibility Base Option From The Pull Down List If Applicable

Record: 1/3 <OSC>

PYCOMBEN showing Advanced Tab with Benefits Print Flag

NOTE: Benefits for which the Benefits Print Flag is unchecked will not appear on the *Benefit Query* screen.

Union Benefits

This is the same program as can be accessed from Payroll menu option Administration > Benefits > Union. Benefits can be set up according to union, and specific trades within a union. Note: In order to set up a union benefit, the benefit code must be defined at the company level for a Pay Group of 'NONE'.

Employee Benefits

This is the same screen as can be accessed from Payroll menu option Administration > Employee > Benefits. See the Payroll manual for details. The *Out of Area* checkbox is used only by HR and is used to indicate that the employee is living outside of the area normally serviced by the benefit plan's service provider. The Vendor Code is not actually used by HR but can be used as a memo field to record an alternate service provider for out of area employees.

The [**Dependent Enrollment**] button is used as a short cut to access the Dependent Benefits screen, described below. This button is enabled only if the current benefit has been defined at the Master benefit level as available to dependents.

Dependent Benefits

The screenshot displays the 'HRDEPBEN - Dependent Benefits' application window. The interface includes a menu bar (Action, Edit, Block, Field, Record, Query, Utility, Help, Window) and a toolbar with various icons. The main content area is organized into several sections:

- Employee and Plan:** Fields for Company (CCC), Employee (CCC-WK-HR2), Benefit Code (MED), Plan (CMIC Test Construction Co), and Max Age no School/Max Age in School.
- Dependents:** Fields for Name (Last: Sherman, First: Elizabeth, Middle:), Gender (Male/Female), Date of Birth (12-05-1998), SSN (241-77-8454), Priority (Normal), and Relationship (CHILD). Checkboxes for 'Dependent', 'In School', and 'Emergency Contact' are present.
- Coverage:** Fields for Effective Date (01-01-2012) and End Date, with an 'Out of Area' checkbox and a 'Covered under another Policy' checkbox.
- User Extensions:** A list of extension fields (User Extension1 through User Extension7) and a 'More Extensions ...' link.
- Related Screens:** A list of related screens (Related Screen 1 through Related Screen 7) and a 'More Related ...' link.

At the bottom of the window, there is a status bar showing 'Record: 1/1' and '<OSC>'.

Pgm: HRDEPBEN – Dependent Benefits

The Dependent Benefits screen is the only screen in the Benefits submenu that is unique to the HR menu. For benefits available to dependents (i.e. the *Dependent Enrollment Allowed* box is checked at the Master benefit level) this screen is accessible in Payroll via a button on the Employee Benefits screen. It is used to specify the benefits that are applicable to each of an employee’s qualified dependents.

Employee and Plan – Block

Specify in this block the company, employee, and benefit that you are enrolling the employee’s dependents in. The LOV for the benefit code is filtered to only display benefits that are applicable to dependents of this employee. That means that the *Dependent Enrollment Allowed* checkbox is checked at the Master Benefit level, and the employee has elected or inherited these benefits with the appropriate plan code.

The *Plan* and *Max Age* fields are for reference purposes and cannot be changed. They are blank except when you are working in the *Coverage* block.

Dependents – Block

You can either query up existing dependents or enter new ones in this block. This is the same information as entered in the Personnel > Employee Relatives screen, except that unneeded items are not shown. The *In School* checkbox is the same as the *Full Time Student* checkbox on the Employee Relatives screen.

Coverage – Block

This block is used to enter the details of the dependents' coverage. The following information can be entered.

Effective Date

Required. This is the only required field.

End Date

Enter an end date if the dependent leaves the plan for any reason (e.g. children reaching 19 years of age, divorced spouses.) For dependent children this date is automatically set to the earlier of a manually entered date or the date that the dependent reaches the cut-off age for the plan. There are two separate cut-off dates per plan, one for use if the child is in school and one for use if he or she is not in school. These ages are retrieved from the Plan Codes table, for the plan currently in effect for the employee. This plan code and the two ages are shown in the top block.

Out of Area

Check this box if the dependent is allowed to see doctors outside of those normally associated with this plan.

Covered under another plan

Check this box if the dependent is covered under another plan (i.e. a spouse's group insurance). The remaining fields are applicable only if this box is checked.

Carrier

The name of the other insurance carrier or a vendor code.

Policy Number

The policy number of the other insurance.

Policy Holder

Free text name of the primary insured (usually the spouse) of the other insurance.

Effective Date

The date the other insurance came into effect.

Deductions

The programs for master deductions, company deductions, union deductions, and employee deductions are the same as found in the CMiC Payroll Application.

Master Deductions

Action Edit Block Field Record Query Utility Help Window

Payroll - TESTV10_X Deductions Master Maintenance

Deduction Details

Code	LIFE
Description	Life Insurance
Short Description	Life Insurance
Reporting Group	
Type	Lump Sum
Based On	NONE None
Amount	
<input checked="" type="checkbox"/> Mandatory	
<input checked="" type="checkbox"/> Employer Contribution	
<input type="checkbox"/> Job Allocation	
<input type="checkbox"/> Work Location Allocation	
<input type="checkbox"/> Department Allocation	
<input type="checkbox"/> Automatic Carry Forward	
<input type="checkbox"/> Include on Invoices	
<input checked="" type="checkbox"/> Dependent Enrollment Allowed	
<input checked="" type="checkbox"/> Create Voucher For Accounts Payable	
<input type="checkbox"/> Exclude Without Wages	
Job Allocation Based On	Default Method <input type="checkbox"/> Job Allocate Using User-Defined Base Code
Calculation Sequence	11
Priority	1
Print Order	1
Maximum Limit Group Code	

Enter Description For Deduction

Record: 1/1 <OSC>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Comp Deduct Maint

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: PYDEDUCT – Master Deductions

This is the same screen as can be accessed from Payroll menu option Administration >Deductions > Master. See the Payroll manual for details.

The **Include on Invoices** checkbox is only applicable when you have checked the **Auto Carry Forward** box in the previous field. Check the **Include on Invoices** box when you want to invoice the employee for any outstanding carry forward amounts paid on behalf of the employee from the calculation of this deduction. This is used by the *Employee Receivables* function of HR

The **Dependent Enrollment Allowed** checkbox is used only by HR and is used to indicate that this deduction is available to dependents. For example, you might check this box for elected medical benefits, but not for union dues or garnishments.

Company Deductions

Enter A Valid Plan Code

Record: 3/3 ... <OSC>

Pgm: PYCOMDED – Company Deductions

This is the same screen as can be accessed from Payroll menu option Administration > Deductions > Company.

NOTE: Deductions for which the *Print* box is unchecked will not appear on the *Deduction Query* screen.

Union Deductions

This is the same screen as can be accessed from Payroll menu option Administration > Deductions > Union. As in Union Benefits, a Union Deduction can only be defined for a deduction that has been defined at the Company level with Pay Group assigned as 'NONE'.

Employee Deductions

This is the same screen as can be accessed from Payroll menu option Setup > Employee > Deductions. See the Payroll manual for details. The *Out of Area* checkbox is used only by HR and is used to indicate that the employee is living outside of the area serviced by the medical plan's normal service provider. The Vendor Code is not actually used by HR but can be used as a memo field to record an alternate service provider for out of area employees.

The [**Dependent Enrollment**] button is used as a short cut to access the Dependent Deductions screen, described below. This button is enabled only if the current deduction has been defined at the Master Benefit level as applicable to dependents.

Dependent Deductions

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Dependent Deductions Previous Block

Employee and Plan

Company	CCC	CMIC Test Construction Co	Plan	
Employee	CCC-WK-HR2	Richard Sherman	Max Age no School	
Deduction Code	LIFE	Life Insurance	Max Age in School	

Dependents

Name: Last Sherman First Elizabeth Middle

Male Female Dependent

Place of Birth Date of Birth MAY-12-1998 In School

Working As

SSN 241-77-8454 Priority Normal

Relationship CHILD Emergency Contact

Coverage

Effective Date 01-01-2012 End Date Out of Area

Covered under another Policy

Carrier

Policy Number

Policy Holder

Effective Date

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter End Date

Record: 1/1 ... <OSC>

Pgm: HRDEPDED – Dependent Deductions

The Dependent Deductions screen is the only screen in the Deductions submenu that is unique to the HR menu. For deductions applicable to dependents (i.e. the **Dependent Enrollment Allowed** box is checked at the Master Deduction level) this screen is accessible in Payroll via a button on the Employee Deductions screen. It is used to specify the deductions that are applicable to each of an employee's qualified dependents.

Employee and Plan – Block

Specify in this block the company, employee, and deduction that you are enrolling the employee's dependents in. The LOV for the deduction code is filtered to only display deductions that are applicable to dependents of this employee. That means that the **Dependent Enrollment Allowed** box is checked at the Master Deduction level, and the employee has elected or inherited these deductions with the appropriate plan code.

The **Plan** and **Max Age** fields are for reference purposes and cannot be changed. They are blank except when you are working in the **Coverage** block.

Dependents – Block

You can either query up existing dependents or enter new ones in this block. This is the same information as entered in the *Personnel > Employee Relatives* screen, except that unneeded items are not shown. The **In School** checkbox is the same as the **Full Time Student** checkbox on the Employee Relatives screen.

Coverage – Block

This block is used to enter the details of the dependents' coverage. The following information can be entered.

Effective Date

Required. This is the only required field.

End Date

Enter an end date if the dependent leaves the plan for any reason (e.g. children reaching 19 years of age, divorced spouses.) For dependent children this date is automatically set to the earlier of a manually entered date or the date that the dependent reaches the cut-off age for the plan. There are two separate cut-off dates per plan, one for use if the child is in school and one for use if he or she is not in school. These ages are retrieved from the Plan Codes table, for the plan currently in effect for the employee. This plan code and the two ages are shown in the top block.

Out of Area

Check this box if the dependent is allowed to see doctors outside of those normally associated with this plan.

Covered under another plan

Check this box if the dependent is covered under another plan (i.e. a spouse's group insurance). The remaining fields are applicable only if this box is checked.

Carrier

The name of the other insurance's carrier or a vendor code.

Policy Number

The policy number of the other insurance.

Policy Holder

Free text name of the primary insured (usually the spouse) of the other insurance.

Effective Date

The date the other insurance came into effect.

Minimums and Maximums

These screens can also be found in the CMiC Payroll application.

Company Min/Max Values is the same as Payroll menu item Setup > Company > Min/Max Values.

FEIN Min/Max Values is the same as Payroll menu item Setup > Company > FEIN Min/Max Values.

Benefit and Deduction Plans

Plan Code	Description	Short Description	Dependent Coverage	Maximum Age	
				in Schl	no Schl
CHILD	Employee and Child	Child	Child coverage	25	19
DEFAULT	default	default	Child coverage	10	2
DEFAULT1	default1	default1	Other		
EMP+CHILD	Employee+Child	Emp+Child	Child coverage		
EMP+FAMILY	Employee + Family	Emp+Family	Spouse and child		
EMP+ONE	Employee plus one	Emp+one	Other		
EMP+SPOUSE	Employee+Spouse	Emp+Spouse	Spouse coverage		
EMPLOYEE	Employee Only	Emp Only	Single coverage		
FAMILY	Employee and Family	Family	Spouse and child	25	19
FAMILY1	family	family	Spouse coverage		
PLAN1	Plan1	Plan1	Spouse and child		
SINGLE	Single	Single	Single coverage		
SL	Supplemental Life	SL	Other		

Pgm: PYBDPLAN – Benefit/Deduction Plans screen

The Benefit and Deduction Plans screen is used to set up the health coverage plans available to the employees within your company. These plans are then assigned the specific options that are associated with the plan. Once you have defined both the plans and the associated options, these items can then be applied to benefit and deductions at the company level allowing for the individualization of benefits and deductions on a plan or plan option basis.

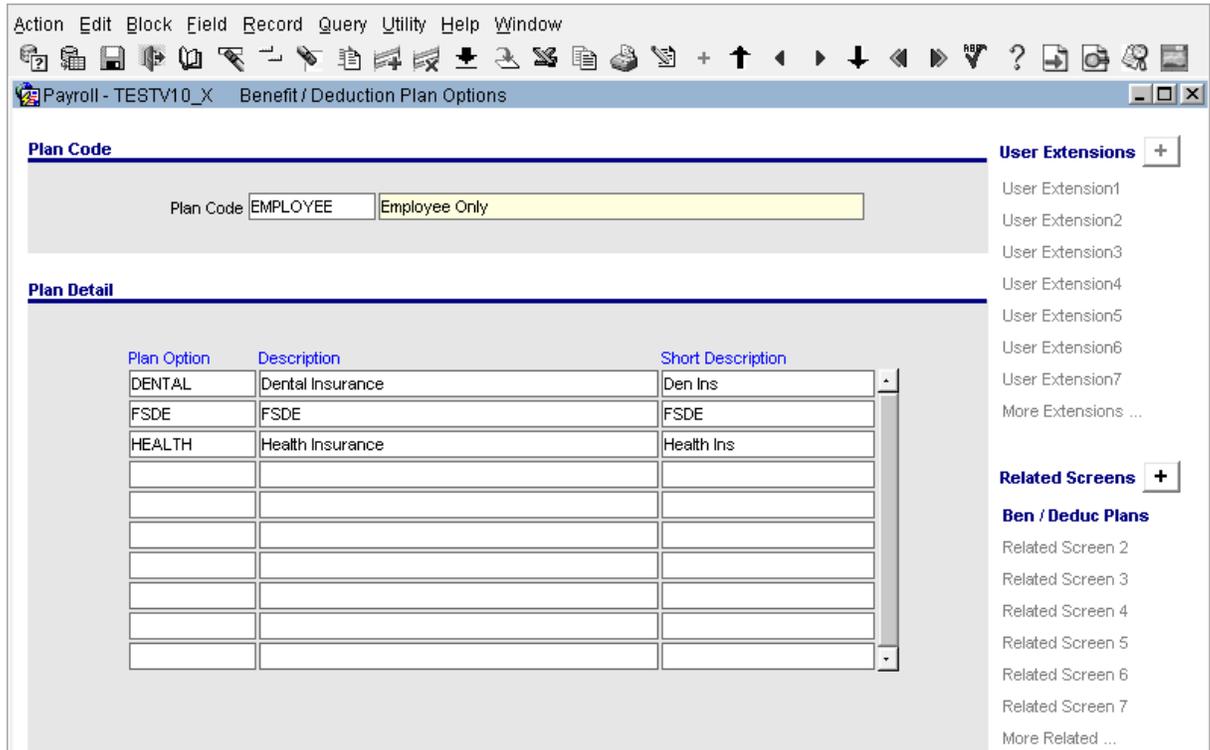
The plan field is a mandatory field within the Company Benefit and Company Deductions programs. For this reason the system comes with a 'Default' plan that can be utilized when you are not associating a plan with a company benefit or deduction.

This screen is also accessible from the Payroll menu using the Administration > Benefits/Deductions > Plans. See the Payroll manual for further details.

The *Dependent Coverage* column is used in reports and utilities such as the Benefit and Deduction export and the COBRA export.

The *Maximum Age* columns are used to specify the ages at which children cease to be covered as dependents. There are two ages – *in Schl* applies to children who are still attending school and *no Schl* applies to children who are not attending school. This information is used by the dependent enrollment screens to determine the end date for dependent benefits and deductions.

Benefit and Deduction Plan Options



Pgm: PYBDPOPT – Benefit/Deduction Plan Options screen

The *Benefit and Deduction Plan Options* screen is used to enter the different options that are available under the plans defined within the *Benefit and Deductions Plans* screen.

Once you have defined both the plans and the associated options, these items can then be applied to benefit and deductions at the company level allowing for the individualization of benefits and deductions on a plan or plan option basis.

The plan option field is a mandatory field within the Company Benefit and Deductions screen. For this reason the system comes with a 'Default' option that can be utilized when you are not associating an option with a company benefit or deduction.

This screen is also accessible from the Payroll menu using the Administration > Benefits/Deductions > Plan Options menu item. See the Payroll manual for further details.

Benefit and Deduction Bases

The following three programs are also available in the CMiC Payroll application.

Benefit and Deduction Base Elements

Pgm: PYCBDELM – Company Benefits/Deductions Elements

This program makes use of previously defined benefit and deduction bases and optional table bases to define custom calculations of benefits and deductions. Above, 401k wages are being defined as the sum of regular hours, overtime hours times 1.5, double time hours times 2 and vacation hours times the employee’s hourly rate. The table base used here determines eligibility – here, it is eligibility after three months. See Benefits and Deductions Table Bases.

This program is also accessible from the Payroll menu using Administration > Benefits/Deductions > Bases. More complete documentation can be found in the Payroll manual.

Company – Block

In this block select a company and a base code. The base code is really the name of the calculation being defined. You must select the base code from a defined list of base codes created using the *Benefits Administration > Ben./Ded. Base* program. If the code has not been defined you can access the same screen by clicking on the *Create Base Code* button.

Base Elements – Block

This block contains the definition of the calculation. Each row in the table is a term in an expression. That is, the results of the computations described by the rows are added together. The meanings of the column are as follows:

Trans Type

The transaction type selected from a LOV. See below for a description of the transaction types.

Code

The possible values of this code depend on the transaction type, with some types not requiring a code at all. See below for a description of the possible codes.

Hour Type

This is applicable only to the Base Wage transaction type. The following options are available: Actual, Premium or Total.

Factor

This number is used to multiply the value defined by the first 3 columns.

Threshold

This amount is subtracted from the result of the first 4 columns, with negative numbers replaced by zero. An exception is made for transaction code "Average Wage", where this number is used to define the number of periods over which to take the average.

Ceiling

The maximum value for this base element. The ceiling value replaces the result of the first 5 columns if that result is greater than the ceiling.

Round Direction

This specifies how the result of the first 6 columns is to be rounded. The options are (always) Up, (always) Down, True (closest of up and down), and None (no rounding.)

Round To

This number specifies the precision to which the result of the first 6 columns is to be rounded.

Table Base

This is an optional reference to a lookup table indexed by age that is used to introduce an additional factor to be multiplied by between columns 3 and 4. The lookup table selected via an LOV is defined using the Benefits Administration > Ben. Ded. Table Bases screen, which can also be accessed by clicking on the *Table Base* button on this screen.

Transaction Types and Codes

The *base value* is the result derived from the first three columns in the base element definition.

Transaction Type

Transaction Codes Available and How the Base Value is Derived

Base Wage (BW)

Types of wages, such as NWHR, OTHR, DTHR. The base value is taken from the current period wages of the specified type of hours.

Benefit (BN)

A user-defined benefit code. The base value is taken from the amount calculated in the current period for the specified benefit.

Deduction (DE)

A user defined deduction code. The base value is taken from the amount calculated in the current period for the specified deduction

Leave (LE)

A user defined leave code. The base value is the number of hours claimed in the current period for the specific type of leave.

Tax (TX)

A tax code. The base value is the amount of the specified tax in the current period.

Expense (EX)

An expense code. The base value is the amount of the specified expense in the current period.

Annual Salary

ANNL (Annual Salary): The base value is the employee's salary, which is obtained from the employee history unless the employee history contains no salary records with a past or current effective date. In that case it is obtained from the employee profile.

ANZD (Annualized Wages): The base value is the employee's pay rate, which is taken from the employee pay rates table unless this table contains no records with a past or current effective date for ALL trades or the employee's current trade and a past or current effective date. In that case the pay rate is taken from the employee profile. Then the rate is multiplied by the number of hours in the year as specified in the employee profile or, if none are specified, the company profile.

Average Wage

The same codes as for Transaction Type BW. The base value is the employee's actual average wage, based on the employee pay history gross pay amounts for the specified wage code, averaged over a number of preceding pay periods for the current pay run. The number of periods used for this averaging is taken from the *Threshold* column.

Years of Service

The transaction code is not used. The base value is taken from the Service Years column of the employee profile, which is updated by a year-end processing program.

YTD Earnings

The same codes as for Transaction Type BW. The base value is the employee's actual earnings, based on the employee pay history gross pay amounts for the specified wage code. This is based on pay date rather than period and includes all pay runs.

Example 1: Non-Taxable Life Insurance Benefit

To define a non-taxable benefit with coverage equal to twice the employee's annual salary rounded to the next higher multiple of 1000, with premium rates based on a table giving factors that depend on the employee's age follow the following steps in setting up a Base Element.

- Transaction Type = Annual Salary
- Factor = 2
- Round Direction = Up
- Round To = 1000
- Ceiling = 50,000

- Threshold = 0 (i.e. There is no threshold.)

The compute the benefit follow the following steps.

- Coverage is a Function of Transaction Type = Annual salary from employee profile in this case;
- Coverage = Round (Coverage * Factor) in the Round Direction to the nearest multiple of Round To;
- Coverage = Maximum (0,Coverage – Threshold);
- If Ceiling > 0 then
 Coverage = Minimum (Coverage, Ceiling);
 End if;

5. If Table Base Code is not null then

 Index = Round (Current Date - Employee Birth Date) down to the nearest year;

 Multiplier = Lookup (Table Base Code, Index);

Else

 Multiplier = 1

End if;

6. Premium = Multiplier * Coverage;

This base element is then referenced by a benefit definition that has been marked as non-taxable.

Example 2: Taxable Life Insurance Benefit

To define a taxable benefit with coverage equal to twice the employee's annual salary rounded to the next higher multiple of 1000, starting after this value reaches 50,000 and with premium rates based on a table giving factors that depend on the employee's age, follow the same steps as above in setting up a Base Element, except that

- Ceiling = 200,000 (Maximum coverage), and
- Threshold = 50,000.

The calculation is exactly the same. If there were no maximums, the ceiling would be set to zero and the Min function in step 1 would be skipped.

This base element is then referenced by a separate benefit definition that has been marked as taxable.

Benefit and Deduction Table Base

Ben./Ded. Table Base

Table Code: PEN Table Description: Pension rate

Table Type: Others Effective Date: 01-01-2012

Based on: Age Term: Years

Retrieve: Single Row Apply To Base: Factor Percentage

Ben./Ded. Table Rows

From	To	Value
0	24	.05
25	29	.08
30	34	.12
35	39	.16
40	44	.24
45	49	.32
50	54	.44
55	59	.6
60	64	.8
65	69	1.2
70	999	0

Record: 8/? <OSC>

Pgm: PYBDTAB – Benefit/Deduction Table Base

The Benefit and Deduction Tables Bases screen is used to define table lookups for the purposes of calculating base elements, or simply to determine benefit/deduction eligibility. It is also accessible from the Payroll menu using the Administration > Benefits/Deductions > Table Bases. More complete documentation is provided in the Payroll manual.

Ben./Ded. Table Base – Block

In this block you define the lookup tables.

Table Code

The (mnemonic) code used to refer to the lookup table.

Table Description

The description of the purpose of the lookup table.

Table Type

The type of table base: Others, Leave or HR Eligibility.

Effective Date

The effective date makes it possible to have several versions of a table.

Based On

Specify whether this table is indexed by Age, Years of Service, Spouse Age, Salary or Original Hire Date.

Term

Specify the term of the table: Weeks, Months, Years or Not Applicable.

Retrieve

Options of Single Row and From First Row. The latter returns the sum of values for all rows up to the row matched by the index.

Apply to Base

Specifies whether the values entered should be treated as factors or percentages. In the latter case, the result of multiplying by the value will be divided by 100.

Ben./Ded. Table Rows – Block (Details)

In this block you define the values returned for each range of index values. The first column is derived from the second column. The third column contains the value returned if the index lies between the values in the first two columns in that row.

Pension Information

Employee#	Last Name	First Name	Employee Status	Work Status	SSN	Susp. Elig.
CCC-WK-HR2	Sherman	Richard	Active	Working	902-31-5640	<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Pgm: HREMPELG – Pension Information

The Pension Information screen is used to control the settings of two checkboxes that are used in exporting data to external pension management provider. These checkboxes are currently used only by the custom *Fidelity Export* function.

All of the information on this screen is display only except for the two checkboxes. However, all columns can be used for entering queries.

Checkbox	Meaning	Description
Susp.	Hardship Suspension	Check this box for an employee who requests that no pension contributions be deducted even though he is eligible. An employee might make such a request if he is having financial difficulties and needs the extra income.
Elig.	Eligible for Pension	Normally this checkbox is checked automatically when an employee becomes eligible to join the pension plan. This update is performed by the Utility > Processing Eligibility menu option.

When an employee is created both of these boxes start off as unchecked.

COBRA and Receivables Parameters

Pgm: HRCBPMNT – COBRA and Receivables Parameters

This parameter screen is used to specify standard values that are required to create the form letters to be sent out for COBRA notification and employee receivable invoices.

The meanings of the parameters are as follows:

Company

Company code that these parameters apply to.

Termination Reason code

Reason for termination.

Days to Deadline

Days to Filing Deadline.

Medical Deduction Code

Medical deduction code. The **[More]** button allows specification of additional codes.

Dental Deduction Code

Dental deduction code. The **[More]** button allows specification of additional codes.

Vision Deduction Code

Vision deduction code. The **[More]** button allows specification of additional codes.

HCS Deduction Code

Health Care deduction code. The **[More]** button allows specification of additional codes.

Dependent Life

Dependent Life deduction code. The **[More]** button allows specification of additional codes.

Basic Life

Basic Life *benefit* code. The **[More]** button allows specification of additional codes.

Supplemental Life

Supplemental Life deduction code. The **[More]** button allows specification of additional codes.

Supplemental STD

Supplemental Short Term Disability deduction code.

Wage Multiplier

Multiplier applied to a weekly rate to get the monthly premium. Note that the prompt naming this parameter should be “Premium Multiplier”.

Admin. Markup

Percentage markup to cover administration. Enter 105 with no decimal place to achieve a 5% markup.

Months for Certificate

Months of coverage to qualify for a COBRA certificate.

Max Days for Break

Maximum allowed break in service to qualify for a COBRA certificate.

COBRA Mail-Merge

This screen is used on a regular basis to generate the COBRA notification letters and enrollment forms. It pulls together the necessary information into a CSV file that is then passed to Microsoft Word as a merge file to be used with a form letter providing the notification. For the mail merge to work you or your system administrator must have specified the location of MS Word in the Preference > Host Program Locations option of the System Data Application.

The meanings of the run-time parameters are as follows:

Company

The company for which the COBRA notification is being done

Current Date

The current date to appear on the notification letters

Pay Run

The pay run from which employees will be selected.

Start Date

The program selects employees who terminate between this date and the specified end date.

End Date

The program selects employees who terminate between the specified start date and this date.

Mail Merge CSV File Name

The output file produced by this program and fed into Word as a merge file. You can use the browse button to locate an existing file or the directory into which you want to save a new file.

COBRA Document File

The path and name of a MS Word DOC file containing the form letter into which the COBRA information is to be merged. You can use the browse button to locate this file. This file will be read, not written, unless you save it within Word.

The [**Process**] button causes the CSV file to be created and then loads Word so you can merge in the CSV file.

The [**View**] button loads your spreadsheet program so that you can examine the CSV file.

Employee Receivables Mail-Merge

This screen is used to create CSV files that can be used in a mail-merge to create invoices to be sent to employees who are on leave or temporary layoff but are maintaining their elected benefits.

This program looks at all outstanding carry-forwards between the specified dates to determine what the employee owes. It uses the deduction codes specified in the parameter screen to determine the deductions to be included in the CSV file. The following deduction types are included in the CSV file:

- Medical
- Dental
- Vision
- Supplemental Life

- Supplemental STD
- Dependent Life
- Other – the sum of all other deductions

Employee Receivables Parameters

Company

The company to which the receivables are owed.

Current Date

The effective date of this set of invoices. Note that the year of this date is used to select carry-forwards from the salary adjustment table.

Pay Run

The pay run for which data is being extracted.

Start Date and End Date

Invoices will be created for employees whose status changed to terminated, retired, on temporary layoff, or on leave during this period.

CSV Export File

The full path and file name of the file that will be written by the export program.

Mail Merge Document File

The full path and file name of a Microsoft Word document into which the data extracted here will be merged.

Employee Receivables Buttons

The [**Export Invoices**] button creates the CSV file and then asks you if you want to merge it with the master invoice document file. To merge it you must have specified a word processor in the *Preferences > Host Program Locations* option of the System Data Application.

The [**Merge Invoices**] button assumes that the file has already been created and just invokes the merge. This saves time when, for whatever reason, the merge failed and you want to try again.

The [**Export Report**] button creates a different format of .CSV file suitable to be loaded into a spreadsheet program to provide a summary of the invoices.

Eligibility Administration

Overview of Benefit and Deduction Eligibility

This module provides a wide range of functionality to the user to administer benefit and deduction plans. The system allows for eligibility rules, coverage areas, importing coverage area data, a one-stop create benefit or deduction screen, and an employee election screen. Benefit and Deduction Administration begins with Eligibility Administration.

Eligibility Rules

Pgm: HRRULADM – Rules Administration

Rules are built in a similar fashion to Pick Lists. The Rules block allows you to define a Rule ID and Description. The Status Field is initially blank, but will contain the Rule Last Processed Date. Page Down or Next Block navigation allows the definition of Criteria. The Rule to which the Criteria apply will highlight; the allowable eligibility criteria can be selected from an LOV containing fields from the Employee Table. Select the field you wish to use as a criterion. Tab to the next field, defining the relationship as ‘=’, ‘<>’, etc. from the drop list. The allowable values of the criteria fields can be entered or selected in the final column.

In the example above, the Rule ID 'CCDENTAL' uses three criteria: EMP_PYG_CODE = SAL, EMP_STATUS = A and EMP_COMP_CODE = CC, or, Employee Pay Group = SAL (Salaried) AND Employee Status = A (Active), AND Employee Company Code = CC (CMiC Construction). If an 'OR' condition is needed, this can be specified in the Static Values block. For example, if the intent of the rule is to include hourly paid employees and salaried employees, but not, for instance, contractors, move from the EMP_PYG_CODE line (Page Down/Next Block) to the Static Values Block and enter/select from the LOV the value 'HOURLY'. The rule part which includes this criterion can be phrased as 'Employees who belong to the Salaried OR Hourly Pay Groups'. Rules can contain as many conditions and values of conditions as required.

Rules are applied to benefits and deductions to determine employees' eligibility. The application of Rules, and the role of the [Process] button and 'Apply Rule' checkboxes will be explained in the 'Benefit and Deduction Setup' section.

The [Show Audit] button gives a history of the rule and changes applied to it, including the User and Machine values for Insert and Edit Rule events.

Coverage Area Administration

Area

Area Code: CHICAGO
 Description:

Import ZIP Code Show Audit

Area Detail

Type	Code	Vendor	Plan Code	Qualifying Start Zip	Qualifying End Zip	Effective Date
Deduction	401P	ZZ-BCBS	DEFAULT	60601	60601	20-05-2011
Benefit	ZZ16	ZZ-BCBS	DEFAULT	60601	60601	01-01-2010

Description: 401P for ZZ
 Plan Description: DEFAULT PLAN

Show Audit Detail

Select The Type Of Code

Record: 1/2 ... <O8C>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

New Payroll

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRZIPADM – Coverage Areas

This program allows the setup of coverage areas for Benefit and/or Deduction Plans by Zip Code and/or specific Vendors. The data can be manually entered or imported from an ASCII file. The Coverage Area is an optional criterion for employee eligibility, usually specified by the plan vendor. The Zip Codes are contained in the Employee Table, defined on the Employee Profile.

Account Maintenance

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Accounts Administration

Code

Type: Benefit
 Code: MED Medical Benefits

Company Accounts

Comp.	Name	Credit Dept.	Credit Acct.	Debit Dept.	Debit Acct.
CCC	CMiC Test Construction Co	00	6021.130	00	6021.131

Credit Department
 Credit Account
 Debit Department
 Debit Account

Enter Account Company Code

Record: 2/2 ... List of Valu... <OSC>

User Extensions

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRACTADM – Accounts Administration

General Ledger accounts are needed to track the financial data related to Benefit and Deduction Plans. The Benefit or Deduction must have been created prior to specifying account information (see Benefit and Deduction Setup). This program must be used to enter account information before using the Employee Eligibility program. Note that the department values are optional and will default from the employee profile if left blank.

Benefit and Deduction Setup

Human Resources - TESTV10_X Benefit And Deduction Setup

Master

Type	Deduction Code	Vendor	Vendor Name	Deduction Long Code	Description
- Deduction	ZZ10	ZZ-BCBS	Blue Cross Blue Shield	ZZ10-HMO	Employee Group HMO
Benefit	ZZ15	ZZ-CGRP	Citigroup	ZZ15	Group Term Life
- Benefit	ZZ16	ZZ-BCBS	Blue Cross Blue Shield	ZZ-16 GTLI	Imputed Group Term Life

Copy Master Setup

Detail

Setup Advance AP Setup Health Care

Plan Code	Plan Option	Effective Date	Deduction Type	Deduction Amount	Remittance Amt.
SINGLE	T-FREE	01/01/2004	Lump Sum		700.000
SINGLE	T-SMOKE	01/01/2004	Lump Sum		1,000.000

Rules Detail

Rule ID	Rule Description	Eligibility Table	Table Description	Coverage Area	Area Description	Auto Elect
- DEFAULT	Default	DEFAULT	Default			<input checked="" type="checkbox"/> Elect
SWC-EMPS	SWC Select Employees	AGE	Age Eligibility Table	CHICAGO		<input type="checkbox"/> Elect
-						<input type="checkbox"/> Elect

Plan Option Tobacco Free
Plan Code Single

Tax Elements Employer Rules Accounts Coverage Area

Enter Benefit Or Deduction Code. This Code Will Be Used In Payroll

Record: 89/100 ... <OSC>

Pgm: HRBDADM – Benefit and Deduction Setup screen; standard Treeview path: HR > Benefit Administration > Benefit/Deduction Administration > Benefit/Deduction.

Benefits and Deductions are created using this screen, as described by the follows subsections.

Master – Block

Master

Type	Deduction Code	Vendor	Vendor Name	Deduction Long Code	Description
- Deduction	ZZ10	ZZ-BCBS	Blue Cross Blue Shield	ZZ10-HMO	Employee Group HMO
Benefit	ZZ15	ZZ-CGRP	Citigroup	ZZ15	Group Term Life
- Benefit	ZZ16	ZZ-BCBS	Blue Cross Blue Shield	ZZ-16 GTLI	Imputed Group Term Life

Copy Master Setup

Sample of **Master** block on screen.

In the **Master** block, choose Benefit or Deduction for the Type. Enter a code for the Benefit or Deduction. Select a Vendor from the LOV. The Vendor must have been defined, usually through Accounts Payable. Type in the Deduction Long Code (same field in Payroll as **Short Description**). Enter a Description for the Benefit or Deduction. Page Down/Next Block navigation causes the system to create the Master record, which is displayed for editing. Alter any parameters suitable for the Benefit or Deduction.

[Master Setup] – Button (Benefit/Deduction Master Setup)

Human Resources - TESTV10_X Benefit/Deduction Master Setup

Code ZZ10

Long Description Employee Group HMO

Short Description Group HMO

Type Lump Sum

Calculation Sequence 20013

Print Order 1

Job Allocation

Work Location Allocation

Dependent Enrollment Allowed

Create Voucher For Accounts Payable

Health Care Insurance

Deduction Open Enrollment

View on Self Service

Allow Open Enrollment

Passive Enrollment

Allow Employee To Override Eligible Amount In Open Enrollment

Attachments Close

Click the **[Master Setup]** button to launch the Benefit/Deduction Master Setup popup, shown above.

Job Allocation – Checkbox

If checked, Deduction is job allocated.

Work Location Allocation – Checkbox

If checked, Work Location Allocation is required for the Deduction (for GL Line only).

Dependent Enrollment Allowed – Checkbox

If checked, Benefit is available to qualified dependents.

Create Voucher for Accounts Payable – Checkbox

If checked, the Payroll module will generate an AP Voucher for this Benefit/Deduction.

Health Care Insurance – Checkbox

If checked, the Benefit/Deduction is for Health Care.

For United States clients, it will be used by the Affordable Care Act Reporting functionality, and the **Health Care** tab will be visible in the **Detail** section of the Benefit and Deduction Setup screen (shown below) for users to assign ACA Code Series 1 codes to the Health Care Benefit.

Type	Benefit Code	Vendor	Vendor Name	Benefit Long Code	Description
Benefit	BN02	00001	The Atlas Corporation The At	BN02	Benefit# 2
Benefit	BN03	00001	The Atlas Corporation The At	DED1	Benefit#3
Benefit	BN03	ZZ-ACME	ZZ-Acme Supply	DED1	Benefit#3

Plan Code	Plan Option	Health Care Coverage Type
DEFAULT	DEFAULT	1B Minimum essential with minimum value for employee.

Deduction – Tab

Mandatory: If checked, the Deduction is mandatory.

Employer Contribution: If checked, the Deduction is associated with the employer contribution.

Automatic Carry Forward: If checked, the Deduction is automatically carried forward to the next period.

Include on Invoices: This checkbox is only applicable when the **Auto Carry Forward** checkbox is checked. Check this box to invoice the employee for any outstanding carry forward amounts paid on behalf of the employee from the calculation of this deduction. This is used by the Employee Receivables function of HR.

Exclude Without Wages: If checked, the system excludes the employer paid deduction when no basic wages exist.

Priority: Priority for the Deduction.

Open Enrollment – Tab

This tab has four checkboxes that are relevant to the Employee Self Service module.

If the **View on Self Service** checkbox is checked, this benefit or deduction will be displayed in Employee Self Service programs, except in Open Enrollment. It will be displayed in Open Enrollment if the **Allow Open Enrollment** checkbox is checked.

The **Passive Enrollment** checkbox determines if the benefit/deduction is passive or non-passive in Employee Self Service. This record can later be modified via this popup.

When the **Allow Employee to Override Eligible Amount in Open Enrollment** checkbox is checked, employees can override the benefit/deduction amount.

Detail – Block

Detail

Setup | Advance | AP Setup | Health Care

Plan Code	Plan Option	Effective Date	Deduction Type	Deduction Amount	Remittance Amt.
SINGLE	T-FREE	01/01/2004	Lump Sum		700.000
SINGLE	T-SMOKE	01/01/2004	Lump Sum		1,000.000

Sample of **Detail** block on screen.

Setup – Tab

On the **Setup** tab, specify the Plan and Plan Option(s) previously defined, and enter the Effective Date and associated costs.

Advance – Tab

The **Advance** tab has fields for specifying Remittance Frequency, Processing Frequency, Base Element Code, Valid Days and End Date.

AP Setup – Tab

On the **AP Setup** tab, enter a Vendor Comment, which will appear as the **Description** field on an automatically created AP Voucher. There is a checkbox to enable this option, or it could have been enabled via the Master record.

Health Care – Tab

Master

Type	Deduction Code	Vendor	Vendor Name	Deduction Long Code	Description
Deduction	ZZ10	ZZ-BCBS	Blue Cross Blue Shield	ZZ10-HMO	Employee Group HMO
Benefit	ZZ15	ZZ-CGRP	Citigroup	ZZ15	Group Term Life
Benefit	ZZ16	ZZ-BCBS	Blue Cross Blue Shield	ZZ-16 GTLI	Imputed Group Term Life

Detail

Setup Advance AP Setup **Health Care**

Plan Code	Plan Option	Affordable Care Act (ACA) Health Care Coverage Type	Employer provides Self-Insured Health Coverage
SINGLE	T-FREE	1B	<input checked="" type="checkbox"/>
SINGLE	T-SMOKE		<input checked="" type="checkbox"/>
			<input type="checkbox"/>

Rules Detail

Find 1%

Rule ID	Rule	Covera...	Description
DEFAULT	Def	1A	Affordable minimum essential minimum value for employee, spouse and dependents.
SWC-EMPS	SW	1B	Minimum essential with minimum value for employee.
		1C	Minimum essential with minimum value for employee and dependents.
		1D	Minimum essential with minimum value for employee and spouse.
		1E	Minimum essential with minimum value for employee, spouse and dependents.
		1F	Minimum essential NOT minimum value for employee and/or spouse and/or dependents.
		1H	Health care that is NOT minimum essential coverage.
		1J	Minimum essential with minimum value for employee and spouse (conditionally).
		1K	Minimum essential with minimum value for employee, spouse (conditionally) and dependents.

This tab, framed above, is visible if the Benefit/Deduction has the **Health Care Insurance** checkbox checked on the Benefit/Deduction Master screen or popup. The popup is launched by clicking the **[Master Setup]** button.

Affordable Care Act (ACA) Health Care Coverage Type

The Code Series 1 code (e.g., 1A, 1B...) for the Affordable Care Act (ACA) health care coverage type.

Employer Provides Self-Insured Health Coverage – Checkbox

If checked, the employer provides self-insured health coverage.

Rules Detail – Block

Page Down/Next Block navigate to the **Rules Detail** block to provide a Rule ID and Eligibility Table for each Plan/Option combination. Multiple Rule IDs, Eligibility Tables and Coverage Areas for each Plan/Option may be specified. Coverage Area is optional.

Tax Elements (taxability of the Benefit/Deduction) can be assigned from the **[Tax Elements]** button. For deductions which have 'Employer Contribution' checked on the Master record, the details of this contribution can be entered on the popup form accessed by the **[Employer Rules]** button.

Employer contributions can be defined to be 'Flat' type or 'Factor' type. Flat type contributions are a specific dollar amount. Factor type contributions represent the portion of the employee contribution to be paid by the employer.

Example:

The Remittance Amount of the CDEN is \$50.00. If the Employer Contribution Type is set to Factor, and the Employer Amount is entered as 0.5, this means that half of the employees' contribution will be paid by the employer. If the Remittance Frequency is Monthly, and the Process Frequency is set to Pay Run, and an employee who has this deduction elected is on a Bi-Weekly pay run, then the employer's contribution is calculated as (\$50 [per month] * 12 [months] / 26 [pay periods]) * 0.5 [factor] = \$11.54 per period.

Each rule can be optionally checked as 'Auto Elect' – this means that new hires that meet the rule requirements will automatically be assigned the benefit or deduction.

When setting up the rule, you can have the system automatically apply the benefit or deduction to employees who are eligible by using the **[Elect]** button. For manual election by employee, use Eligibility Administration.

In order to apply the specific rule that was previously created for specific company, user goes back to Rules Administration screen, check the checkbox Apply Rule and click on **[Process]** button.

The screenshot shows the 'Rules Administration' window. The 'Rules' table contains one entry: Rule ID 'CCC-WEEKLY', Description 'CCC weekly employee', Status 'Rule Last Processed Date 13-SEP-2013', and the 'Apply Rule' checkbox is checked. Below the table is a message box that says 'Processing Completed ...' and buttons for 'Show Audit' and 'Process'. The 'Criteria' section shows a table with one row: EMP_PRN_CODE 'Employee Pay Run', Description '=', and value 'CCCW'. The 'Static Values' section is currently empty. On the right, 'User Extensions' lists 'User Extension1' through 'User Extension7' and 'More Extensions ...'. 'Related Screens' lists 'Related Screen 1' through 'Related Screen 7' and 'More Related ...'. The status bar at the bottom shows 'Enter List Code', 'Record: 1/1', and '<OSC>'.

Eligibility Administration

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Eligibility Administration

Employee

Employee CCC-WK-HR2 Richard Sherman

Eligible Plan(s)

Code	Vendor	Comp.	Pay Run	GRP.	Type	Eligibility Date	Plan Code	Plan Option	Remittance Frequency	Eligible Amount	Employee Amount	
MED	AETNA	CCC	CCCW	HR	BN	05-02-2013	FAMILY	T-FREE	Bi-Weekly		120.00	<input checked="" type="checkbox"/>
												<input type="checkbox"/>
												<input type="checkbox"/>
												<input type="checkbox"/>
												<input type="checkbox"/>

Description Medical Benefits Type Lump Sum Show Eligible History Elect

Elected Plan(s)

Code	Vendor	Description	Plan Code	Plan Option	Effective Date	Eligible Amount	Amount

Type Enroll Dependents

Record: 1/1 ... <OSC>

Pgm: HRELGADM – Eligibility Administration

The Eligible Plan(s) section of the screen shows which benefits or deductions the employee is eligible for but has not elected. The system will allow you to check multiple items. Pressing the [Elect] button will apply the selected benefit(s)/deduction(s) to the employee.

The Elected Plan(s) section of the screen shows all employee elected items. If an item is no longer valid according to the rules, the record will be shown in red. This can happen for several reasons: an employee may have moved out of the coverage area, or the Plan may have ended and been replaced by another Plan with different coverage (a different Plan Option) or the company may have changed vendors for the Plan.

Once any employee has elected a benefit or deduction plan, the terms of the plan cannot be changed. Instead, the existing Plan/Plan Option must be ended by entering an end date in the Details block of the Benefit and Deduction Setup program. A new Plan/Plan Option can be entered in the same Details block which can start the following day to the Plan which has been ended.

If the employee specified in the Employee block has dependents, they may be enrolled into a Deduction, provided that the appropriate option has been checked for that Deduction in the Master setup. The employee must have had dependents set up previously in the Employee Relatives program (Personnel > Employee Relatives).

Plan Administration is also available. Specifying a benefit or deduction with the appropriate Plan and Plan Option will show eligible employees in a similar manner as seen above.

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Eligibility Administration

Employee

Employee: CCC-WK-HR2 Richard Sherman

Eligible Plan(s)

Code	Vendor	Comp.	Pay Run	GRP.	Type	Eligibility Date	Plan Code	Plan Option	Remittance Frequency	Eligible Amount	Employee Amount
MED	AETNA	CCC	CCCW	HR	BN	05-02-2013	FAMILY	T-FREE	Bi-Weekly		120.00

Description: Medical Benefits Type: Lump Sum

Show Eligible History Elect

Elected Plan(s)

Code	Vendor	Description	Plan Code	Plan Option	Effective Date	Eligible Amount	Amount
MED	AETNA	Medical Benefits	FAMILY	T-FREE	05-02-2013		120.00

Type: Enroll Dependents

Record: 1/1 ... <OSC>

Pgm: HRELGADM – Eligibility Administration

Here, the MED benefit has been selected; the same employee seen in the Eligibility Administration program is shown here, with the deduction eligible and elected. Dependent enrollment is available here as it was in Eligibility Administration.

Plan Administration

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Eligibility Administration

Employee

Employee: CCC-WK-HR2 Richard Sherman

Eligible Plan(s)

Code	Vendor	Comp.	Pay Run	Pay	GRP.	Type	Eligibility Date	Plan Code	Plan Option	Remittance Frequency	Eligible Amount	Employee Amount
MED	AETNA	CCC	CCCW	HR	BN		05-02-2013	FAMILY	T-FREE	Bi-Weekly		120.00

Description: Medical Benefits Type: Lump Sum Show Eligible History Elect

Elected Plan(s)

Code	Vendor	Description	Plan Code	Plan Option	Effective Date	Eligible Amount	Amount
MED	AETNA	Medical Benefits	FAMILY	T-FREE	05-02-2013		120.00

Type: Enroll Dependents

Record: 1/1 <OSC>

Pgm: HRPLNADM – Plan Administration

Plan Administration is also available. Specifying a benefit or deduction with the appropriate Plan and Plan Option will show eligible employees in a similar manner as in eligibility administration screen above.

Applicants

Applicant Information

The screenshot displays the 'Applicant Information' screen in the HRAPLCNT system. The window title is 'Human Resources - TESTV10_X Applicant Information'. The menu bar includes 'Action', 'Edit', 'Block', 'Field', 'Record', 'Query', 'Utility', 'Help', and 'Window'. The toolbar contains various icons for navigation and editing. The main form is titled 'Applicant' and contains the following fields:

- Company: CCC, CMIc Test Construction Co
- Application Date: 13-09-2013
- Number: CC012
- SSN: 324-87-4112
- Employed As: [Empty]
- Last Name: Walter
- First: Dana
- Status: [Empty]
- Middle Name: [Empty]
- Application Status: Application Pending

Below these fields are tabs for 'Skills', 'Education', 'Positions', 'Membership', 'References', 'Emp. History', and 'License/Cert.'. The 'Address' tab is selected, showing 'Mailing Address' and 'Physical Address' sections. The 'Mailing Address' section includes fields for '123 Shady Lane', 'Chicago', and 'Zip Code 60617'. The 'Physical Address' section includes fields for 'Zip Code'. Below these are 'Country', 'State', 'County', and 'City' dropdown menus, all set to US, IL, COOK, and CHI respectively. The 'Residence' section includes 'Latitude' and 'Longitude' fields.

On the right side of the screen, there are sections for 'User Extensions' (User Extension1 through User Extension7, and More Extensions ...) and 'Related Screens' (Related Screen 1 through Related Screen 7, and More Related ...).

At the bottom of the screen, there is a status bar with the text 'Enter Value For Apl Ph Address1', 'Record: 1/1', and '<OSC>'.

Pgm: HRAPLCNT – Applicant Information - Address Tab

Use this screen to enter information about job applicants.

Applicant – Block

Company

The company to which the person is applying.

Application Date

Required. The date when the application was either submitted or processed.

Number

Depending on a setting of user DA's Default Company screen in CMiC Payroll, the applicant number may be enterable, in which case it is required, or automatically generated when you commit a new record. If you enter your own applicant numbers they must be different from existing employees, as well as, applicant numbers.

SSN

If the SSN matches that of an existing employee that employee's information will be copied to the new applicant record. It is not possible to change an applicant's status to *Hired* until a SSN has been specified. If the SSN matches an earlier application, that information such as Name/Address will be copied into the new record if requested. (Multiple Applicant Records may exist with the same SSN)

Name

The first and last names are required. The middle name is optional.

Application Status

Possible values of this unlabeled status LOV are *Application Pending* (the default), *Hired*, and *Rejected*. When you change this to *Hired* the applicant information, including detail tables, is automatically copied to the Employee Profile and Employee History.

Status

The Status acts as a modifier to Application Status. The values in this optional LOV are user-defined in Setup > Codes > Status Codes using the Screen Title 'Applicant'.

Address – Tab

This tab contains the address of the applicant. None of this information is system required until an applicant is hired, so information should be entered according to company policy. The Country, State, County, and City fields are references to tables in CMiC Payroll and have LOVs to assist in the selection of a valid value. There is no validation of the other fields.

Contact – Tab

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Applicant Information

Applicant

Company CCC CMIC Test Construction Co Application Date 13-09-2013
 Number CC012 SSN 324-87-4112 Employed As
 Last Name Walter First Dana Status
 Middle Name Application Status Application Pending

Skills Education Positions Membership References Emp. History License/Cert.

Address Contact Personal Miscellaneous Interview

Home Phone Number 312 555 1212
 Work Phone Number
 Cell Phone Number 773 5551212
 Pager
 Home Fax
 Work Fax
 Email Address walter.dana@hotmail.com

User Extensions +
 User Extension1
 User Extension2
 User Extension3
 User Extension4
 User Extension5
 User Extension6
 User Extension7
 More Extensions ...

Related Screens +
Related Screen 1
 Related Screen 2
 Related Screen 3
 Related Screen 4
 Related Screen 5
 Related Screen 6
 Related Screen 7
 More Related ...

Email Address Of The Applicant

Record: 1/1 ... <OSC>

Pgm: HRAPLNT – Applicant Information - Contact Tab

Enter telephone, fax, and pager numbers, as well as an email address on this tab. All fields are system optional, so entry of data would be according to company policy on applicants.

Personal – Tab

Human Resources - TESTV10_X Applicant Information

Applicant

Company CCC CMIC Test Construction Co Application Date 13-09-2013
Number CC012 SSN 324-87-4112 Employed As
Last Name Walter First Dana Status
Middle Name Application Status Application Pending
Skills Education Positions Membership References Emp. History License/Cert.
Address Contact Personal Miscellaneous Interview
Gender Female Ethnic Group Unknown
Military Status NV Military Separation Date
Marital Status Married Dominant Hand Unknown
Resident Status Citizen
Date Of Birth 12-05-1978
Place of Birth
Disability NONE No Disability
 Able To Travel Distance
Checked: The Employee Is Willing/able To Travel
Record: 1/1 <OSC>

Pgm: HRAPRCNT – Applicant Information - Personal Tab

This tab is used to enter personal information about the applicant.

Sex

Required.

Ethnic Group

Optional. Possible values are White, Black, Hispanic, Asian/Pacific Islander, American Indian/Alaskan Native

Military Status

Required. Possible values are Not Veteran (the default), Veteran, Disabled Veteran, and Vietnam Veteran, Inactive Reserve or Ready (Drilling) Reserve

Marital Status

Required. Possible values are Single, Married, Separated, Divorced, Common Law.

Resident Status

Required. Possible values are Citizen (the default), Immigrant, Refugee, Work Permit.

Dominant Hand

Required. Possible values are N/A (the default), Right Handed, Left Handed, and Ambidextrous.

Date of Birth and Place of Birth

Optional.

Disability

Optional. Select this from the LOV based on the Disability Code table defined in the *Setup > Codes* menu.

Able to Travel

Check this if the applicant is able and willing to travel.

Distance

Optional. If the above box is checked enter the maximum distance the applicant is willing to travel.

Miscellaneous – Tab

Human Resources - TESTV10_X Applicant Information

Applicant

Company CCC CMIC Test Construction Co Application Date 13-09-2013

Number CC012 SSN 324-87-4112 Employed As

Last Name Walter First Dana Status

Middle Name Application Status Application Pending

Skills Education Positions Membership References Emp. History License/Cert.

Address Contact Personal Miscellaneous Interview

Source Of Applicant CST Chicago Sun Times Type Salaried

Preferred Language English Warranty Days Fee Fee Type

Expected Hourly Rate 30.000 Expected Salary .00 Per Hour

Date Available Application Location CCC1 CCC1 Address

Position Applied For 4713 Payroll Clerk

User Extensions +

User Extension1
User Extension2
User Extension3
User Extension4
User Extension5
User Extension6
User Extension7
More Extensions ...

Related Screens +

Related Screen 1
Related Screen 2
Related Screen 3
Related Screen 4
Related Screen 5
Related Screen 6
Related Screen 7
More Related ...

Identify The The Offered Position

Record: 1/1 ... List of Valu... <OSC>

Pgm: HRAPRCNT – Applicant Information - Miscellaneous Tab

This tab is used to enter additional information about the applicant and application.

Source of Applicant

Optional. A reference to the Referral Sources table defined in the *Setup > Local Tables* menu.

Type

Optional. Choices are Salaried (the default), Hourly, Commission, Piecework, Student, and Co-op.

Previously Employed as

If this applicant is a former employee, use this field to insert a reference to the applicant's former employee number. This will happen automatically if the SSN causes the existing employee information to be copied to this applicant.

Referring Employee

Optional. These fields are visible only if the Source of Applicant has a value that specifies that the source is an employee referral. Setting the Employee Referral checkbox on the Referral Sources maintenance screen accomplishes this.

Preferred Language

Optional.

Expected Hourly Rate

Optional.

Expected Salary

Optional.

Per

Optional. For use with expected salary, this specifies that the salary is to be interpreted as per Year, Month, Week, or Day.

Date Available

Optional.

Application Location

Optional. A reference to the site address table maintained in Setup > Global Tables > Address.

Position Applied For

Optional. A reference to one of the positions defined on the Setup > Local Tables > Position/Occupation Info. > Positions screen.

Interview – Tab

The screenshot displays a web-based application window titled "Human Resources - TESTV10_X Applicant Information". The interface includes a menu bar with options like Action, Edit, Block, Field, Record, Query, Utility, Help, and Window. Below the menu is a toolbar with various icons. The main content area is titled "Applicant" and contains several data entry fields and tabs. The "Interview" tab is currently selected, showing fields for Date (12-09-2013), Interviewed By (CCC-WK-HR1, Lincoln Isabella), and a Comment field containing the text: "This applicant brings an impressive word record and will be an asset to the company." Other tabs include Skills, Education, Positions, Membership, References, Emp. History, License/Cert., Address, Contact, Personal, and Miscellaneous. On the right side, there are sections for "User Extensions" (User Extension1 through User Extension7 and More Extensions ...) and "Related Screens" (Related Screen 1 through Related Screen 7 and More Related ...). At the bottom, there is a status bar with the text "Enter A General Comment About The Interview" and "Record: 1/1".

Pgm: HRAPRCNT – Applicant Information - Interview Tab

This tab is used to enter information about the applicant’s job interview. Note that the system currently supports only a single interview, but additional interviews can be managed as references. All fields are optional and their meaning is obvious.

Detail Buttons

In addition to the tabs there are a set of buttons used to enter additional detailed information (i.e. where several values may be associated with each applicant.) Some of these buttons invoke popup windows and other call up complete screens that are also available on the Personnel menu. The buttons that call up screens are Education and Membership. Refer to the Personnel section for a description of these screens. The popup windows are described below.

Skills Popup

Enter the applicant’s skills by selecting them from an LOV based on the values defined on the Setup > Local Tables > Skills > Skills (or Required Skills) screen.

Experience and Rank both default to zero. The value of experience is the number of months of experience using this skill. The rank is used to indicate either the applicant’s relative expertise in each of the specified skills or his or her preferences to use the skills.

Positions Popup

Enter the positions that the applicant would like to occupy by selecting them from an LOV based on the values defined on the Setup > Local Tables > Position/Occupation Info. > Positions screen.

Experience and Rank both default to zero. The value of experience is the number of years of experience in this or a similar position. The rank is used to indicate the applicant's preferences to fill the positions.

References Popup

This popup is used to record the contact information for references and to later enter the results of contacting the references.

Employment History Popup

This popup is used to record the applicant's previous employment history.

Applicant Documents

Code	Document Number	Organization	Date Issued	Expiration Date	Renewal Date
CPP	RH457111	YORKU	10-06-2011		

Pgm: HREMPDOC – Applicant Documents

This is the same program that can be accessed from Personnel > Documents. The Code field is from values defined in Setup > Local Tables > Documents > Documents. Document Number is a free-form field. The Organization field is from values defined in Setup > Local Tables > Organizations.

Training and Certifications

Training Courses and Modules

This screen is used to define the courses and, if relevant, the modules within the courses that are to be tracked.

Training courses can be delivered as a unit or they can be broken up into modules. This screen allows you to define either type of course. The course is defined in the first block and its component modules in the second (detail) block. Modules cannot exist independently of the course to which they belong.

Training Course and Module – Block

Human Resources - TESTV10_X Training Courses and Modules

Training Course and Module

Code: SAFETY Name: Company Safety Training Short Name: Safety Training
Description: Company Safety Training Desc Updated: 13-09-2013
Prerequisite:
Duration: 10.00 Days Cost: 2,500.00 Credit Hours: 5
Frequency: YEARLY Yearly Internal Sticker

Course and Module Detail

Code: SAF10002 Name: Safety 10002 Short Name: SAF10002
Description: Basic safety training for the workplace 2 Desc Updated: 13-09-2013
Duration: 1.00 Days Cost: 100.00 Credit Hours: 8

Code: Name: Short Name:
Description: Desc Updated:
Duration: Days Cost: Credit Hours:

Enter Training Module

Record: 2/2 ... List of Valu... <OSC>

Pgm: HRTRAINING – Training Courses and Modules

Code

Required. The course code.

Name

Required. A descriptive name for the course.

Short Name

Required. An abbreviated name for use where there is no room for the normal name.

Description

Optional. A more detailed description of the course, including the possibility of entering the entire syllabus.

Desc Updated

Display only. This shows when the description of the course was last updated.

Prerequisite

Optional. Specifies a course that must be completed prior to taking this one.

Duration

Optional. The length of the course and units for the length.

Cost

Optional. The cost of (usually an external) course.

Credit Hours

Optional. The number of hours to be credited to employees completing this course.

Frequency

Optional. A reference to the Frequency codes set up using the Setup > Codes > Frequency screen. This specifies how frequently this course needs to be repeated.

Internal

Check this if this is an internal course (i.e. given by your own staff) and leave it unchecked if employees are sent to an outside trainer.

Sticker

Check this if a helmet sticker is issued following successful completion of this course.

Course and Module Detail – Block

Enter details of all modules for the course displayed in the first block. Although only two modules at a time are displayed, any number of modules can be entered.

The fields in this block have the same meaning as the similarly named fields in the Training Course Block.

Training by Course

Human Resources - TESTM10 - X Training by Course

Company Code

Code: CCC CMIC Test Construction Co

Applicant Employee

Course Code

Course	Module	Cost
SAFETY	SAF10002	Safety 10002
		100.00

Employee

Employee	Required	Started	Completed	Grade	Status	Duration
CCC-WK-HR2	YORKU	01-09-2013	10-09-2013		COMPLETE	1.00 Days

Name: Richard Sherman Trainer:

SSN: 902-31-5640 Status: Active

Enter Duration Of The Course

Record: 1/1 <OSC>

Pgm: HREMPITR- Training By Course

This screen is used to enter all the students for a specific course or module and to enter the results for these students.

Company Code – Block

Enter the company used to filter the employees.

Course Code – Block

This block will filter the information to the entered/selected Course and Module.

Employee/Applicant – Block

This field allows display and entry of Applicants and Employees attending or previously attending the specified Course and Module.

Training by Employee

Pgm: HREMINTR– Training By Employee

This program is used to enter, update and review for a specific employee or applicant, all of the courses that he or she has taken or is scheduled to take.

Company Code – Block

Enter the company used to filter the employees.

Employee – Block

You can either execute a query to scroll through several employees or you can use an LOV to select a single employee or applicant. However, you can enter query information only in the employee number field.

Course Detail – Block

The following table shows all of the columns that can be entered, not just those visible without scrolling sideways.

Course

A course code. While the cursor is in this column, the name of the current course is displayed at the bottom of the screen.

Module

Optional – even if the course definition includes modules. A module code. While the cursor is in this column, the name of the current module is displayed at the bottom of the screen.

Start Date

The date the course or module started or is scheduled to start.

Date Complete

Optionally enter the date the course or module was completed if it was completed.

Grade

Optionally enter a letter or number grade.

Status

Optionally enter/select a user-defined code from the table maintained by the Setup > Codes > Status Codes screen. While the cursor is in this column, the description of the current status is displayed at the bottom of the screen.

Duration

Optional. In the first column enter a number. In the second select the units for that number (e.g. 2 days, 3 hours, 1 week.) The units default to days.

Org. Req.

Optionally enter or select from the LOV the code of an organization that requires this training to be performed. While the cursor is in this column, the name of the current organization is displayed at the bottom of the screen.

Goal

Optionally enter or select from the LOV the code of a position that this training will help qualify the student for. While the cursor is in this column, the name of the position that is the current goal is displayed at the bottom of the screen.

Written Rating

Optionally provide the rating on written work done in the course. A user-defined code from the table maintained by the Setup > Codes > Rating Codes program. While the cursor is in this column, the description of the current rating is displayed at the bottom of the screen.

Perf. Rating

Optionally provide the rating on the student's practical performance in the course. A user-defined code from the table maintained by the Setup > Codes > Rating Codes screen. While the cursor is in this column, the description of the current rating is displayed at the bottom of the screen.

Cost

Optionally specify the cost of the course or module for this employee.

Retrain on

Optionally enter the date when the course or module must be repeated.

Memo

A free text field to enter any other information.

Maintain and Schedule Classes

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Maintain and Schedule Classes

Maintain Classes

Code SAFETYCLAS

Description Basic Safety

Short Description SAFETYCLAS

Course SAFETY Company Safety Training

Module SAF10002 Safety 10002

Trainer 1 Darren Billings

Start Date 14-09-2013 Room

Start Time Completion Date

Status SCHEDULE Schedule

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Schedule Classes

Employee	Started	Completed	Status	Duration	Written Rating
CCC-WMK-HR2	14-09-2013		SCHEDULE	1.00 Days	

Name Richard Sherman

Status Written Rat. Perf. Rat.

Enter Completion Date Of The Course

Record: 1/1 <OSC>

Related Screens +

Related Screen 1

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRCLASS – Maintain and Schedule Classes

This screen is used to schedule classes and employee/applicants that will be attending.

Enter or query training class information in this program. Enter a class Code (free-form), Description, Short Description, Course (Training and Certifications > Training Courses and Modules), Trainer (optional), Start Date, Completion Date, and Status (Setup > Codes > Status Codes, type=Training) and any of the other optional fields.

Types of Certification or Licenses

Human Resources - TESTM00.Y - Type of Certification / Licenses

Certification or Licenses

Code SAFETY
 Description Safety Certificate
 Short Description SAFETY
 Cost 100.00
 Validity 1.00 Years
 License Issue Sticker

Certification Requirements

Organization	Position	Comp	Job	Course / Training
APEO		CCC		SAFETY

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Related Screen 1

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter Position - List Available
 Record: 1/1 ... List of Valu... <OSC>

Pgm: HRCERT – Types of Certifications and Licenses

This screen is used to define the various licenses and certifications that employees or applicants may acquire.

This screen serves two purposes. The first block is used to define the types of licenses or certifications available. The use of this block is required if any licenses or certifications are to be recorded for employees or applicants. The second block is used to specify why the certification or license is required. This information is optional.

Certification or Licenses – Block

Enter the following information:

Code

Code used to identify this license or certification.

Name

Name of the license or certification.

Short Name

Short name used where space is prohibitive.

Cost

Annual renewal cost. Value defaults to zero.

License

Check this if this is a license and leave unchecked for a certification.

Issue Sticker

Check this if a sticker should be issued to holders of this certification or license.

Employee Certification / Licenses

Certification / License	Effective	Requalify / Renew on	Supervising Employee
SAFETY	14-09-2013	14-09-2014	CCC-WK-HR1

Pgm: HREMCERT – Types of Certifications and Licenses by Applicant/Employee

This screen is used to record what licenses and certifications an employee or applicant has.

Company – Block

Specify the company used to filter the employees. Also use the radio buttons to specify whether you want to enter licenses and certifications for employees or applicants.

Employee – Block

Enter a query to select one or more employees or applicants, use the LOV to select a single employee or applicant. By using a query you can browse through the licenses and certifications of all employees or applicants that matched the query.

Certification or License – Block

Enter the following information for each certification or license.

Certification / License

Required. The certification or license code.

Effective

Required. The date that the certification or license became effective or was issued.

License Class

Optional. This can only be entered for licenses and is a free format alphanumeric code.

License Number

Optional. This can only be entered for licenses and is a free format alphanumeric code.

State

Optional. This can only be entered for licenses and is a reference to the Payroll State table. There is an LOV that can be used to enter valid codes.

Requalify / Renew on

Optional. The date when the license or certification must be renewed either by paying the renewal fee or taking a test or both.

Supervising Employee

Optional. The employee number of a staff member who supervised a test taken to qualify for a certification.

Skills Achieved by Certifications

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Skills by Certifications

Certification

Position SAFETY Safety Certificate

Skills Achieved

Skill	
ELECTRICAL	Electrician

Clear Field

Record: 2/2 ... List of Valu... <OSC>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Related Screen 1

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRCERSKL – Skills by Certifications

This form is used to specify by Certification the skills that employees or applicants would have by achieving the specified Certification.

Courses Required by Positions

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Courses Required for Positions

Positions

Position

Position Requirements

Course	Module		
PMO	Project Manager Training	PMINTRO	Introduction to PM

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Related Screen 1

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Record: 1/1 ... List of Valu... <OSC>

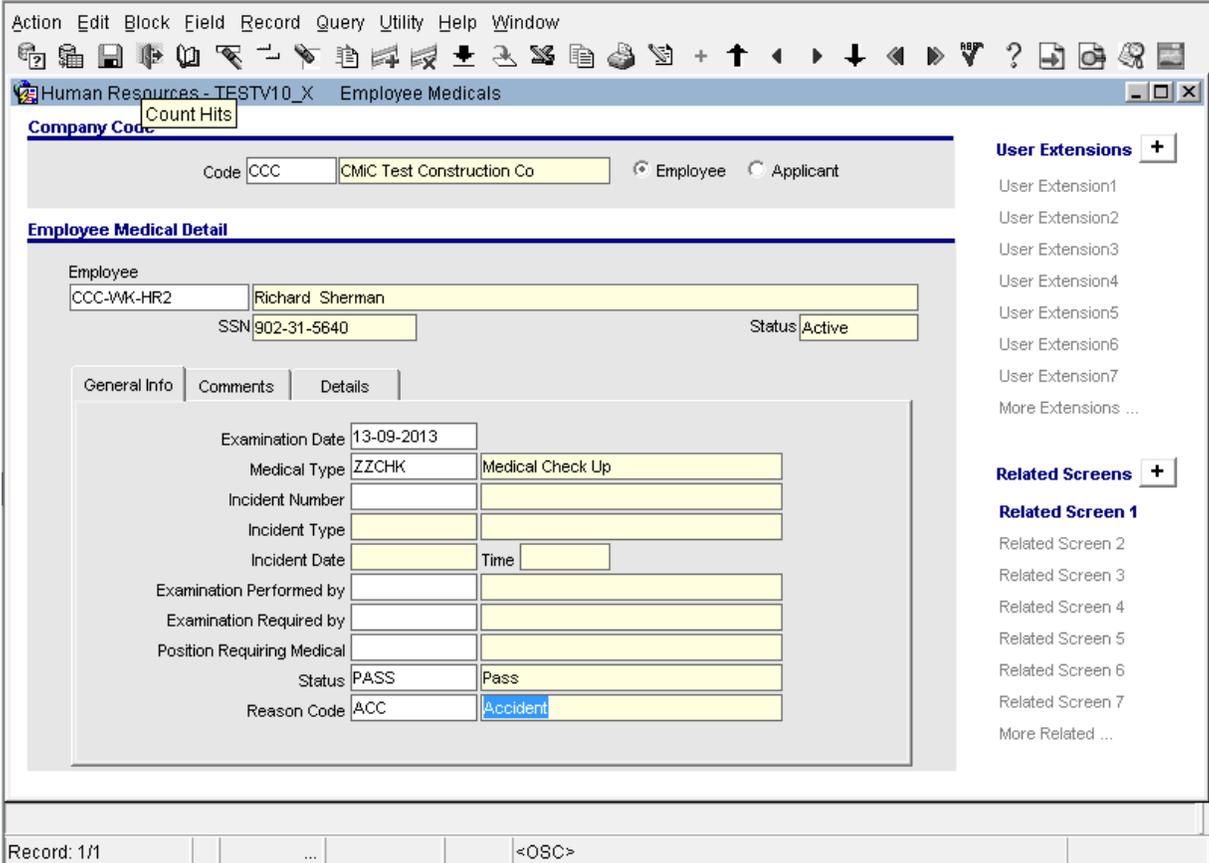
Pgm: HRCRSPOS – Courses Required for Positions

This form is used to specify Courses and Modules that employees and applicants are required to possess for the position specified in the header block.

Medical

Medical Results by Employee or Applicant

This screen is used to enter a set of medical results for a single employee. It would typically be used when the results of a comprehensive checkup are received. Before you can use this screen you must have set up the codes describing medical tests and checkups using the *Medical Test Descriptions* and *Medical Checkup Types* options at the end of the *Medical* menu.



Pgm: HREMPMED – Medical Results by Employee or Applicant

Company Code – Block

Specify the company used to filter the employees. Also use the radio buttons to specify whether you want to enter medical results for employees or applicants.

Employee Medical Detail – Block

Use the LOV to select an employee or applicant. You cannot use a query here.

General Info – Tab

On this tab enter the following general information about the checkup.

Examination Date

Required. Enter the date of the examination.

Medical Type

Required. There is an LOV to assist you in selecting a valid type code (defined in Medical > Medical Checkup Types).

Incident

Optional. If this checkup was the result of a safety incident, enter a reference to the incident that prompted the checkup. There is an LOV to assist you. Incidents are defined in the Safety > Enter Incidents screen.

Examination Performed by

Optional. Enter a reference to the organization (e.g. hospital, clinic, etc.) that performed the checkup. There is an LOV to assist you.

Examination Required by

Optional. Enter a reference to the Organization that required this checkup (e.g. to qualify for a certification or work at a specific job site.) There is an LOV to assist you.

Position for which the Medical is Required

Optional. If the medical was required in order for the employee to work in a specific position, enter a reference to that position (defined in the Setup > Local Tables > Position / Occupation Info > Positions program). There is an LOV available.

Status

Optional. A reference to a user-defined status code defined in the Setup > Codes > Status Codes program.

Reason Code

Optional. A reference to a user-defined text code defined in the Setup > Global Tables > Text Codes program (the same Text Type as defined in the HR Control File). There is an LOV available.

Comments – Tab

This tab contains a single large multi-line text field suitable for entering a detailed free text description of the findings of the checkup.

Details – Tab

This tab is where you enter the information about the individual tests that were performed as part of the checkup.

Medical Test

Required. Select or enter one of the medical test codes.

Result

Required. Enter or use the LOV to select a qualitative rating code that was defined using the Setup > Codes > Rating Codes program.

Numeric Result

Optional. Enter a numeric result where applicable.

Follow up on

Optional. Enter a date when a follow-up examination is required or recommended.

Cost

Optional. Enter the cost of this test.

Comment

Optional. Enter a comment that is specific to this test.

Medical Results by Test

This screen is used to enter a set of results for a single test performed on several employees or applicants. It would typically be used when the results of a test are received back from a laboratory (e.g. blood tests.) Before you can use this screen you must have set up the codes describing medical tests and checkups using the *Medical Test Descriptions* and *Medical Checkup Types* options at the end of the *Medical* menu.

Company Code

Code CCC CMIC Test Construction Co Employee Applicant

Medical Results

Type EYEEXM Test Eye Exam EYES Eye Exam

Employee	Examination Date	Result	Numeric Result	Follow up on	Cost
CCC-WK-HR2	13-09-2013	PASSED		23-09-2013	70.00

Name Richard Sherman

SSN 902-31-5640 Status Active

Enter Incident Number - List Available

Record: 1/1 ... List of Valu... <OSC>

Pgm: HREMPMDT – Medical Results by Test

Company Code – Block

Specify the company used to filter the employees. Also use the radio buttons to specify whether entering medical results for employees or applicants.

Medical Results – Block

Type

Enter or select a Checkup Type from the LOV.

Test

Enter or select a Medical Test from the LOV.

Employee

Enter or select a valid employee or applicant number from the LOV. The name of this person will be displayed at the bottom of the screen.

Examination Date

Required. Enter the date when the test was performed.

Result

Select or use the LOV to enter a qualitative rating code that was predefined using the Setup > Codes > Rating Codes screen.

Numeric Result

Optionally enter a numeric result where applicable.

Follow up on

Enter an optional date when a follow-up examination is required or recommended.

Cost

Enter the cost of this test if applicable.

Work Modifications

Pgm: HREMPWMD – Employee Work Modifications

This screen is used to specify what activity employees or applicants either should not be asked to do or should not be asked to do frequently. These work modifications are typically the result of a medical problem. Several sets of work modifications may be in effect at the same time.

Company Code – Block

Specify the company to be used to filter the employee list. Also use the radio buttons to specify whether you are entering/querying information on employees or applicants.

Employee Detail – Block (Work Modification)

Enter general information about a set of work modifications here.

Employee

Required. Enter or select from the LOV an employee or applicant.

Dominant Hand

Optional. Select a value from the LOV.

Effective Date

Required. The date the work modifications come into effect.

End Date

Optionally enter the date when the work modifications expire.

Re-evaluate Date

Optionally specify the date when the work modifications should be re-evaluated.

Information Source

Optionally enter the source of the information that motivated or justified the work modifications. Possible values are Pre-placement, Physical, Medical, Injury/Illness, and Other.

Case No.

Optional. If the information source is Injury/Illness (or even if it is not) use this field to enter or select from an LOV the number of the incident recorded in the safety menu that resulted in the injury or describes the illness.

Medical

Optional. Use this field to enter or select from an LOV the medical test performed on this employee that justifies the work modification.

Status

Required. Select one of the following codes from the LOV: Pending (the default), Denied, Granted, Alternate, Cancelled, Expired. Most of these are self-explanatory. "Alternate" means that this modification was denied, but another was granted in its place.

Site Address

Optional. Enter or select the work site where these modifications are in effect. This field may be updated automatically when a work modification agreement is printed after transfer to a new job site. The codes accepted here are entered on the Setup > Global Tables > Address screen.

Regional Office

Optional. Enter or select a region code.

Last Review Date

Optional.

Last Agreement Date

Optional. This will normally be updated automatically each time a work modification agreement is printed.

Comments

Optional. Free text comments.

Work Restriction – Block (Work Modification Details)

Enter detailed information about the work modifications here. Work modifications fall into two categories. The first of these are activities, such as lift with the right hand, lift with the left hand, climb stairs, and bend down. These must be associated with a frequency that specifies how often the activity can be performed. The second category consists of quantifiable limitations such as the maximum weight that can be lifted or the temperature of the workplace.

Work Modification

Enter or select from the LOV a work modification.

Frequency

Optionally enter or select from the LOV a work modification frequency that was defined using the Setup > Codes > Work Modification Frequencies program. These codes classify how often the activity specified in the work modification can be performed.

End Date

Specify the date when this work modification expires. This date is optional and overrides the end date in the general block if it precedes it.

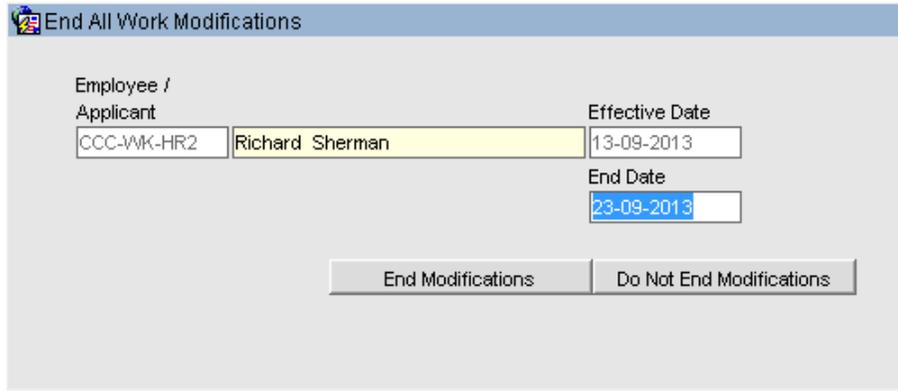
Limit

An optional numeric limit that is applicable to some work modifications (e.g. temperature of the workplace, maximum weight that can be lifted).

Comments

Optionally enter free text comments specific to this work modification.

Canceling Work Modifications



The screenshot shows a window titled "End All Work Modifications". It contains the following fields and buttons:

Employee / Applicant	Effective Date
CCC-WMK-HR2 Richard Sherman	13-09-2013
	End Date
	23-09-2013

Buttons: End Modifications, Do Not End Modifications

Pgm: HREMPWMD – Employee Work Modifications Cancellation Popup

It is possible to simply enter end dates and allow work modifications to end on their own. This typically does not result in a change to the status field, but does ensure that the work modification no longer appears on printed work modification agreements.

Clicking on the End Work Modifications button causes an immediate cancellation of the entire set of work modifications. It pops up a window on which you can change the end date before accepting.

Print Work Modification Agreement

Human Resources - TESTV10_X Work Modification Agreement

Work Modification Agreement

Print for: Employee
 Applicant
 Employee Pick List
 Employee Import File

Company: CCC | CMiC Test Construction Co

Agreement Date: 13-09-2013

Supervisor: []

Safety Specialist: []

Employee: CCC-WK-HR2 | Richard Sherman

Employee Pick List: []

Import File Name: []

Addr. Company: CCC | CMiC Test Construction Co

Site Address: CCC1 | CCC1 Address

Job Code: []

Print for Signature

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Related Screen 1

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter Job Code

Record: 1/1 ... List of Valu... <OSC>

Pgm: HRWMDAGR – Print Work Modification Agreement

The Work Modification Agreement is a document that is printed out at the job site and signed by the employee and his or her supervisor. This document lists all of the employee’s current work modifications and formally records the agreement of the employee and supervisor to abide by these modifications.

Work Modification Agreement – Block

Enter the following parameters to determine what should appear in the printout.

Company

Required, defaults to the user’s current company.

Agreement Date

Required, defaults to today’s date. This date is used to determine which work modifications will be included on the printout. Only agreements that start before this date and end after it (or have no end date) will be included.

Supervisor

Optional. If it is included the name of the supervisor will appear on the printout; otherwise it will have to be entered by hand. Enter an employee number or select it from the LOV.

Safety Specialist

Optional. If it is included the name of the safety specialist will appear on the printout; otherwise it will have to be entered by hand. Enter an employee number or select it from the LOV.

Employee

Required. All work modifications currently in effect for this employee will be included on the printout along with the employee's name. Enter an employee number or select it from the LOV.

Site Address

Optional. The job site where the agreement is being signed. The site address name will appear at the top of the printout. If the *Print for Signature* box has been checked this code will be stored in the employee work modification to record where the work modification was last in effect.

Job Code

Optional. The job site where the agreement is being signed. If the *Print for Signature* box has been checked this code will be stored in the employee work modification to record where the work modification was last in effect. Note that this information is not visible on the *Work Modifications* screen.

Print for Signature

Defaults to the checked state. Uncheck this box if you are printing the agreement for reference purposes and not to be signed. If you later decide to sign it you can either print another one or manually update the site address using the work modification screen. The latter option is error-prone, however.

When the **[Print]** button is clicked the report is printed and the employee work modifications table is updated (if the box was checked.)

Environmental Conditions

The Environmental Conditions submenu contains the setup, data entry, query, and report options for recording and reporting on environmental conditions.

Environmental Conditions Setup Screens

Contaminants

Use this screen to define codes for contaminants being monitored. If you are no longer interested in monitoring a specific contaminant, uncheck the *Active* box to hide it in the lists of values and validation.

Sampling Types

Use this screen to define codes for sampling types. If you are no longer using a sampling type, uncheck the *Active* box to hide it in the lists of values and validation.

Sampling Tools

Use this screen to define codes for sampling tools. If you are no longer using a sampling tool, uncheck the *Active* box to hide it in the lists of values and validation.

Engineering / Admin Controls

Use this screen to define codes for engineering and administrative controls. If you are no longer using a control, uncheck the *Active* box to hide it in the lists of values and validation.

Personal Protective Equipment

Use this screen to define codes for Personal Protective Equipment. If you are no longer using a type of equipment, uncheck the *Active* box to hide it in the lists of values and validation.

Exposure Groups

Use this screen to define codes for exposure groups and to assign employees to these groups. This information is used for the Employee Exposure Report.

Exposure Group

Enter the code and name of the exposure group. If you are no longer using an exposure group, uncheck the *Active* box to hide it in the lists of values and validation.

Employees in Exposure Group

Select one or more employees or enter their employee numbers in this list.

Environmental Conditions Entry

Action Edit Block Field Record Query Utility Help Window

Human Resources Duplicate Field Environmental Condition Rep

Company

Company CCC CMiC Test Construction Co

Sample Report Header

Sample Code 20060722-AIR

Date of Sampling 13-09-2013

Site Address CCC1 CCC1 Address

Temperature 84.00 Humidity 37.00

Wind Speed 22.00 Direction South East

Atmospheric Pressure 104.10

Location of Sample

Sampling On Exposure Group Employee

Exposure Group CHEM Harmful Chemicals

Shift Duration

Comment

Measurements

Contaminant	Name	Sampling Type	Unit	Result	PEL	TWA	Action Level
ASBESTOS	Asbestos	AIR	NA	7.7	1.01		

Enter Activity Level

Record: 1/1 <OSC>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRENV RPT – Enter Environmental Conditions

This screen is used to enter environmental condition reports.

Company – Block

Enter or select the company code.

Sample Report Header – Block

In the *Sample Report* block enter the general information about a sample report. Associated with each report there can be four lists of details. The most important of these are the contaminant measurements that are entered and displayed in the *Measurements* (third) block. The other lists of details are accessed via the three buttons located between blocks 2 and 3.

Measurements – Block

Select one or more contaminants from the list of values. For each contaminant, specify the following information:

Column	Meaning	Description
Sampling Type	Sampling Type	(Optional) A valid value from the Sampling Types table.
Unit	Unit of measurement	(Optional) A valid value from the global Weight and Measures table.
<	Relationship	'=' or '<', indicating whether the reading is exact or an upper limit.
Result	Result	The value of the measurement reading in the unit of measurement specified under Unit.
PEL	Permissible exposure limit	(Optional) The permissible exposure limit is also expressed in the unit of measurement specified under Unit.
TWA	Time weighted average	(Optional) The time-weighted average is also expressed in the unit of measurement specified under Unit.
Activity Level	Activity level	(Optional) The activity level is also expressed in the unit of measurement specified under Unit.

Sampling Tool

Enter in the popup list one or more sampling tool codes, selected from or validated against the table of valid sampling tools.

Protective Eqp

Enter in the popup list one or more codes for protective equipment, selected from or validated against the table of protective equipment.

Eng/Admin Ctls

Enter in the popup list one or more codes for engineering / administrative controls, selected from or validated against the table of engineering / administrative controls.

Environmental Conditions Query

This screen is used to formulate complex queries and display the results on the screen.

To use this screen, enter one or more query parameters and click on the **[Search]** button. A list of matching environmental condition reports is displayed in a popup window.

The query results popup window includes the following information:

- Sample Code
- Date
- Site Address
- Exposure Group
- Temperature and Humidity
- Wind Speed and Direction
- Pressure
- Location (free text)
- Comments

On this popup window there are two buttons. The **[Close]** button closes the window. The **[Export]** button allows you to write the results of the query to a CSV file.

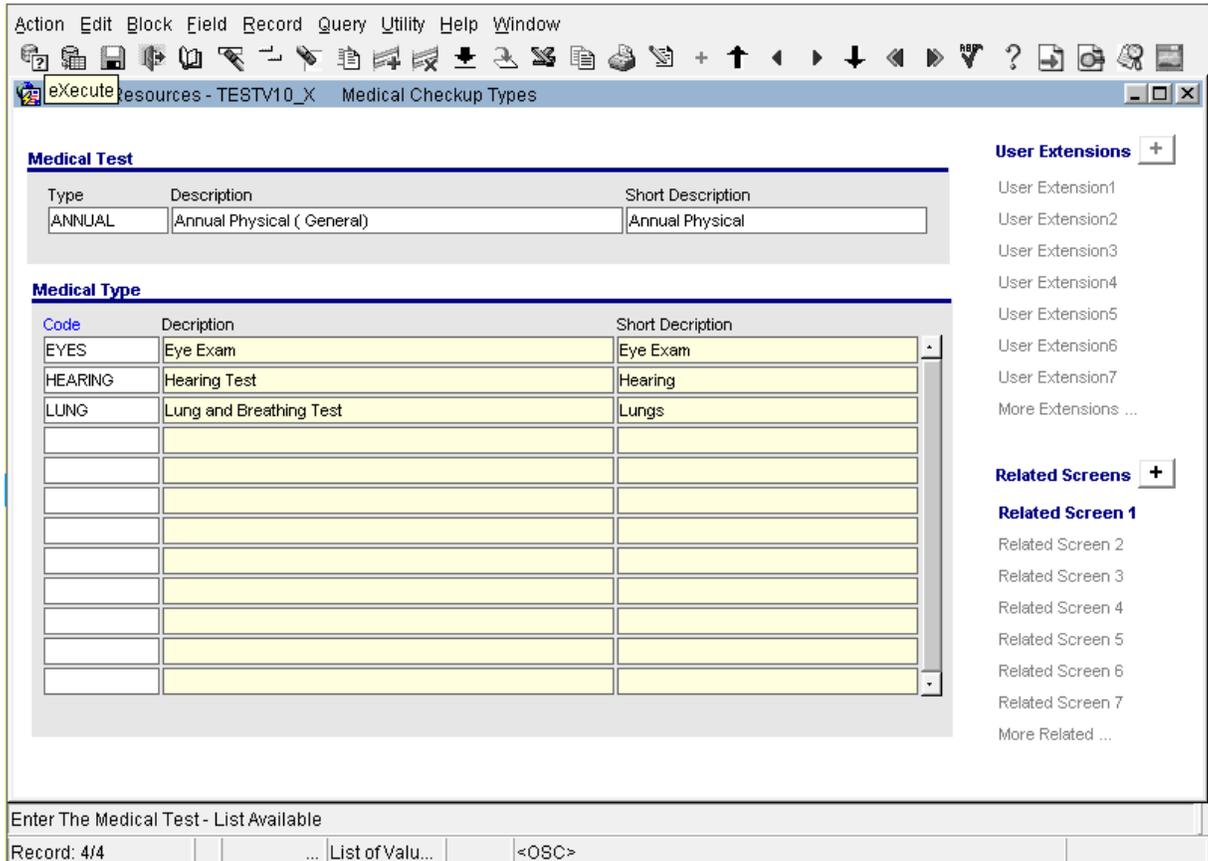
When you click on the **[Export]** button a dialog box is displayed so you can enter the path and name of the file you wish to write the information to.

This dialog box has two buttons, one to proceed with the export and one to close the window without writing the file.

Employee Exposure Report

This report is a list of all employees in exposure groups that have environmental condition reports that meet the criteria specified on the parameter screen.

Medical Checkup Types



Pgm: HRMEDTYP- Medical Checkup Types

This screen is used to define the types of checkups that may be administered. Each checkup will consist of one or more of the basic tests defined in the *Medical Test Descriptions* screen.

Medical Test – Block

Enter a new checkup type code and descriptions or query up an existing one. All fields are required.

Medical Type – Block

Select the tests (defined in Medical Test Descriptions) that are to be administered as part of the above checkup.

Safety Menu

Entering Incidents

The screenshot shows a software window titled "Human Resources - TESTV10_X" with the subtitle "Employer's First Report of Incident". The window has a menu bar (Action, Edit, Block, Field, Record, Query, Utility, Help, Window) and a toolbar with various icons. Below the title bar, there is a "Company Code" section with a "Type" dropdown menu set to "Employee". The main section is titled "Incident" and contains a tabbed interface with tabs for "Incident", "Classify", "Description", "Medical Attention", "General", "Classifiers", "Liability Info", "Liability Reserves", and "WC Reserves". The "Incident" tab is selected, displaying a form with the following fields and values:

Incident Number	Employee	SSN	Date of Birth	Sex	Type	
	CCC-WK-HR2	Richard Sherman	902-31-5640	01-01-1975	M	H
						<input type="checkbox"/> Closed
Company	Claim Type	Claim #	Policy #			
CCC	Liability	89230	AET-H-IL-1000			
Incident Type	Description					
SPRAIN	Muscle sprain					
Report Date	Date of Occurrence	Time	Time Employee Began Work	Crew Type	Crew Name	
13-09-2013	13-09-2013	Friday				
Comp Site Addr.	Regional Office					
CCC	ZCHI	Company ZZ - Chicago Region				
Job	Country	State	Operator			
J000131.00	J000131.00	US	AL			
Event Occurred						
Witness Name	Witness Description of Incident					
Witness Contact Info						

At the bottom of the form, there is a text input field labeled "Enter Witness Description" and a "Record: 1/1" indicator. There are also "Audit" and "Print Claim Form" buttons.

Pgm: HRINCDNT – Incident Entry – Incident Tab

This screen is used to record or view any incident that may affect safety or employees' health.

Incident – Tab

Incident Number

Not enterable. An automatically generated sequence number that may also be referred to as the case number elsewhere in the system.

Closed

Check this when the incident is closed and uncheck it if the incident is reopened. Each time this box changes an audit record is saved.

Audit Button

Click on this to review the audit records resulting from closing and reopening this incident.

Incident Type

Required. Enter or select from the LOV one of the user-defined incident types. These incident types are defined using the Incident Types maintenance screen on the Safety menu.

Description

Optional. A brief description of the incident. You can enter a much longer description on the Description tab page.

Report Date

Optional. The date that the incident was reported.

Date of Occurrence

Optional. The date that the incident occurred.

Time of Occurrence

Optional. The time of day that the incident occurred.

Safety Appliance

Select one of “None available”, “Available but not used”, and “Available and in use”.

On Site

Check this box if the incident occurred at the job site.

Site Address

Optional. Enter or select from the LOV the address denoting the job site where the incident occurred or the employee was working at the time of the incident. If the site address has associated with it a region, country, and state, these will be filled in automatically when the site address is validated.

Regional Office

Optional. Enter or select from the LOV the region where the incident occurred. A default value may be obtained from the site address but this can be overridden.

Job

Optional. Enter or select from the LOV the job on which the employee was working.

Country of Occurrence

Required. Enter or select from the LOV the country (as defined in the payroll Country table) in which the incident occurred. A default value may be obtained from the site address but this can be overridden.

State

Required. Enter or select from the LOV the state or province (as defined in the payroll State table) in which the incident occurred. A default value may be obtained from the site address but this can be overridden.

Classify – Tab

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Employer's First Report of Incident

Company Code

Type Employee

Incident

Incident Classify Description Medical Attention General Classifiers Liability Info Liability Reserves WC Reserves

Contribution Factor INEXPER Inexperience

Reason

Safety Appliance None available On Site

Affects Safety Hours Effective Date

OSHA Recordable

Work Related

OCIP/CCIP

May do Regular duty

Lost Time: Workers' Compensation will pay lost time OSHA

Lost Days Last Date of Work Create/View Lost Time History

Modified Duty Modified Days

Latest Date of Disability Last Date of Disability Create/View Modified Duty History

Checked: Reason Will Be Recordable

Record: 1/1 <OSC>

Pgm: HRINCDNT – Incident Entry – Classify Tab

Contributing Factor

Required. Select from the LOV one of the user-defined contributing factors. These contributing factors are defined using the Contributing Factors maintenance screen on the Safety menu.

Recordable

Check this box if this incident is to be included in the total Recordable column of the Injury Analysis (545) Report.

Reason

This field cannot be entered unless the Recordable box is checked, in which case it is required. Select from the LOV a text code (defined in the global text code table.) Only codes having the text type specified on the Safety tab of the HR control file (Setup > Local Tables > Control) are valid here.

Work Related

Check this if the incident is to be included in the Total Injuries column of the Injury Analysis (545) Report. If the Recordable box is checked the incident is assumed to be work related, this box is automatically checked, and it cannot be unchecked.

Severity

Select one of Minor, Moderate, Severe, and Fatal.

Date of Death

Cannot be entered unless the Severity is Fatal, in which case it is required.

Affects Safe Hours

Check this box if this incident should result in the employee and job losing accumulated safe hours. If this box is checked, the Job field on the Incident tab and the Effective Date on this tab are required.

Effective Date

Cannot be entered unless Affects Safe Hours is checked, in which case it is required. All hours accumulated by the employee and this job before this date will be deducted from the safe hours accumulators.

May do Regular Duty

Not currently used.

Lost Time: Workers' Compensation.

Check this box if the employee lost time that was compensated for by workers' compensation.

Lost Time: OSHA

Check this box if the employee lost time that had to be reported to OSHA. Incidents for which this box is checked are counted as Lost Time incidents on the EEO 545 and EEO 510 reports.

Lost Days

Optional. Number of days lost by this employee due to this incident.

Last Day of Work

Optional. Last day worked by this employee before lost time that resulted from this incident.

Restricted Duty

Check this box if work modification resulted from this incident. There is currently no validation that this checkbox is consistent with the employee work modifications that have been recorded.

Restricted Days

Optional. The number of days that the resulting work modifications were or are expected to be in effect. This is used in EEO and OSHA reporting.

First Date of Disability

Optional. The first day that the work modifications were in effect. This is not used or validated against the employee's work modifications, but is for memo purposes only.

Last Date of Disability

Optional. The last day that the work modifications were in effect. This is not used or validated against the employee's work modifications, but is for memo purposes only.

Description – Tab

This tab contains two multi-line text fields to be used for entering detailed descriptions of the sequence of events and the activity the employee was engaged in at the time of the incident.

Medical Attention – Tab

Pgm: HRINCNT – Incident Entry – Medical Attention Tab

Injury Type

Optional. Select from the LOV one of the injury types previously defined on the Safety > Injury Types screen.

Illness Type

Optional. Select from the LOV one of the illness types previously defined on the Safety > Illness Types screen.

Body Part

Optional. Select from the LOV one of the body parts previously defined on the Safety > Body Parts screen. Note that summaries of body parts are included in the Injury Analysis (545) report, so entering this information, when relevant, can be useful.

Treatment Type

Optional. Select from the LOV one of the treatment types previously defined on the Safety > Treatment Types screen.

Treating Organization

Optional. Enter the name or description of the institution or person who treated this injury or illness. No validation is performed.

Prescription Med.

Optional. Enter a free text description of the medicines that were prescribed as a result of this treatment.

Non-Prescription Med.

Optional. Enter a free text description of any over-the-counter medication that was recommended as a result of this treatment.

General – Tab

Human Resources - TESTV10_X Employer's First Report of Incident

Company Code

Type Employee

Incident

Incident | Classify | Description | Medical Attention | General | Classifiers | Liability Info | Liability Reserves | WVC Reserves

Supervisor	CCC-WK-HR1	Isabella Lincoln	Phone	787441223
Safety Manager				
Superintendent				
Regional Manager				
Project Manager				
Claim Contact Person				
Insurance Adjusters Name				
Country of Compensation				
State of Compensation				
Sponsoring Organization				
Case Notes				

Enter Safety Manager Number

Record: 1/1 ... List of Valu... <OSC>

Pgm: HRINCDNT – Incident Entry – General Tab

Supervisor

Optional. Enter or select from the LOV the employee who is the supervisor of the employee for whom this incident is being recorded.

Safety Manager

Optional. Enter or select from the LOV the employee who is the safety manager for the job site where the incident occurred.

Superintendent

Optional. Enter or select from the LOV the employee who is the superintendent for the job site where the incident occurred.

Regional Manager

Optional. Enter or select from the LOV the employee who is the region manager for the region where the incident occurred.

Country of Compensation

Optional. Enter or select from the LOV a valid country code. This information is not currently used.

State of Compensation

Optional. Enter or select from the LOV a valid state code for the country code specified above. This information is not currently used.

Sponsoring Organization

This information is not currently used.

Liability Info, Liability Reserves, WC Reserves – Tabs (Incident Claim Reserves)

The screenshot shows the 'Employer's First Report of Incident' form. The 'Liability Reserves' tab is selected and highlighted with a pink box. The form contains the following data:

Reserves									
Date	Bodily Injury	Property Damage	Expense	Total Batch	Post Date	Distribution	Post		
07/10/2009	100,000.00	100,000.00	100,000.00	300,000.00	501	07/13/2009	Distribution	Post	
07/11/2009	140,000.00	145,000.00	154,000.00	439,000.00	505	07/13/2009	Distribution	Post	
07/12/2009	155,000.00	158,000.00	160,000.00	473,000.00	509		Distribution	Post	
							Distribution	Post	
	395,000.00	403,000.00	414,000.00	1,212,000.00					

Transactions					
Date	Bodily Injury	Property Damage	Expense	Recovery	Total
07/13/2009	5,690.00	.00	.00	.00	5,690.00
	.00	.00	.00	.00	5,690.00

Most claims have costs associated with them, whether it is a Workers Compensation or Liability claim. These costs are initially set up as “Reserves” (allocations) and entered in CMiC. Reserves are simply estimates as to potential charges that may accrue during the life of the claim. For example, the project or job on which an incident occurred may be charged with the costs of medical treatment for an injured employee and possible legal expenses. If the insurance carrier is involved with the investigation of the claim, there is a charge associated with the service. The reserves and paid amounts are updated as expenses are realized or new information is received. The main purpose of capturing these charges is to keep the project team and financial operations aware of the costs allocated to their projects and track paid amounts up to the insurance deductible.

In order for CMiC to be able to track the individual cost components of an Incident (either WC or Liability), the **Liability Info**, **Liability Reserves** and **WC Reserves** tabs are used. The setup required to use this feature is detailed in the *Reserves versus Actual Costs – Setup & Processing* section further below. Also see the Incident Claim Local Tables and Incident Claim Maintenance sections.

Liability Info – Tab

This tab is enabled when the Claim Type = Liability

Liability Reserves – Tab

This tab is enabled when the Claim Type = Liability

WC Reserves – Tab

This tab is enabled when the Claim Type = WC.

Transactions – Section

These are all the transactions posted to the 'MASTER CLAIM' job where the Phase Code = the Incident # and the Category Code is the Claim Category.

Reserves versus Actual Costs – Setup & Processing

The following describes the steps required for setting up and processing Reserves and Costs related to Incident Claims.

- **Set the Incident Number mask** on the HR Control - Safety tab. If no mask is set, the next sequential number is used from the system, when the incident is saved on creation.
- **Complete the data for the following related Local Tables:**
Accident Types, Auto Claim Types, Liability Claim Types, Claim Policy Numbers, Coverage Types, Utility Types and Treating Organizations.

- **Complete the Incident Claim Maintenance form setup**

Master Claim Job – This is the Master Job against which the claims will be maintained.

Closed Job - Used as the incident claim job if the actual incident claim job is closed at the time of closing the incident claim.

The Phases, Categories, Accounts are pre-defined in the appropriate Local Tables in the Job Costing and General Ledger modules.

The Reserve Category (WC and Liability) must be assigned to the Reserve Phase (WC and Liability).

In order for CMiC to be able to track the individual cost components of an Incident (either WC or Liability) there will need to be unique Categories defined for each of the cost elements.

- **Complete the Incident Claim Entry** screen tabs, including the Reserves tab. The Reserve Amount may be adjusted many times during the life of the project. Each reserve adjustment should be entered as the adjustment amount not the new total reserve amount. The Incident Number is generated as per the HR Control mask.
- **Create a MASTER PHASE using the Incident Number** as the phase code in the same company as the MASTER CLAIM JOB.
- Click the **[Distribution]** button prior to posting and it will show that the Reserve Phase/Reserve Category have been automatically assigned to the Incident Claim Job. It also shows the Batch Number for the batch that has automatically been created for the reserves posting.

Distribution – DR (J-line) incident claim job (uses reserve claim phase/category),

CR (G-line) master claim liability account (master claim dept/claim liability account). Changes can be made before posting, but are revalidated prior to posting.

- **Post Reserves.** The following occurs when Reserves are posted:
 - ∅ the Posting Date is populated in the Reserves screen
 - ∅ the MASTER CLAIM JOB is updated with the Reserve Claim Categories for the claim type (WC or Liability). The Incident Number is the phase for these.
 - ∅ the budget per reserve claim category of the MASTER CLAIM job is adjusted via a posted Internal PCI which is auto-created during posting (The CM Control File checkbox '**Internal Change Orders Update Budget**' must be checked).
 - ∅ the Reserve Phase/Category for the Incident Job has the **Projected Final Amount** updated as per the Total Reserve Amount
 - ∅ review the JC query for the J-line transaction created for Incident Claim Job
 - ∅ review Assign Phases and Forecasting screens for MASTER CLAIM JOB, and GL Query for the claim liability account
 - ∅ review Change Management Query for internal PCI for MASTER CLAIM JOB
 - ∅ review Posting Reports (JC): JC > Utilities > Posting Reports
- **Post Incident Claim Cost transactions against the MASTER Claim job** using the phase code = the Incident Number. This is most likely done via AP invoices. The distribution of the invoice will be a J line to the MASTER CLAIM JOB with the Phase = the Incident # and the Category = the Claim Type category.

Closing Out an Incident Claim

When a claim is closed, there is a requirement to ensure that the job has not been over/under charged.

To close out the claim, check the **Closed** checkbox on the Incident tab. On committing the update the following happens:

- Comparison of Total Reserve Amount against Total Actual Costs, per claim category (WC or Liability types) within the claim, to determine whether a DR or CR should be made to the job.
- A Batch is automatically created with distribution...adjustments can be made if necessary....revalidation is carried out on committing. This transaction will be:
 - DR/CR JC - Incident Claim job with Reserve Phase/Category (Total Reserve minus Actual Cost Amt)
 - CR/DR GL - Claim Liability Account (Total Reserve minus Actual Cost Amt)
- a line showing the closing reserve entry with the updated balance will be displayed in the Reserves tab
- the budget on the Master Claim Job will be updated to equate to the Actual Cost for that Incident #, per claim category
- the Projected Final Amount on the Incident Claim Job (Reserve Phase/Category) is updated to be the Total Actual Cost for the reserve category
- review the Forecast, Assign Phases, JC Detail Query (to see the opposite transaction for the close-out), General Ledger
- review the Posting Reports (JC): JC > Utilities > Posting Reports

Action Edit Block Field Record Query Utility Help Window

Human Resources - PRODV10 Employer's First Report of Incident

Company Code

Type Employee

Incident

Incident Classify Description Medical Attention General Classifiers Liability Info Liability Reserves WC Reserves

Reserves

Date	Bodily Injury	Property Damage	Expense	Recovery	Total Batch	Post Date		
170112	1,000.00	2,000.00	3,000.00	4,000.00	10,000.00	4501	17-JAN-2012	Distribution Post
170112	-100.00	-2,000.00	-3,000.00	-3,967.00	-9,067.00	4503	17-JAN-2012	Distribution Post
								Distribution Post
								Distribution Post
	900.00	.00	.00	33.00	933.00			

Transactions

Date	Bodily Injury	Property Damage	Expense	Recovery	Total
17-JAN-2012	900.00	.00	.00	33.00	933.00
	900.00	.00	.00	33.00	933.00

NOTE: If the Incident Job is closed, the system will substitute the 'Closed Job'.

Re-opening an Incident Claim

Re-open a closed incident by un-checking the **Closed** checkbox. All transactional history is retained. Reserves posting and cost postings can proceed again.

Safe Hours by Job

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Safe Hours

Company

Code CCC CMIC Test Construction Co

Safe Hours by Job

Code	Name	Hours			Lost on Last Reset
		Earned	Used	Lost	
1000	Project 1000 With Job Series 1000 (Forecast with ADF On	50.00	.00	.00	.00

Record: 1/1 ... <OSC>

User Extensions

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

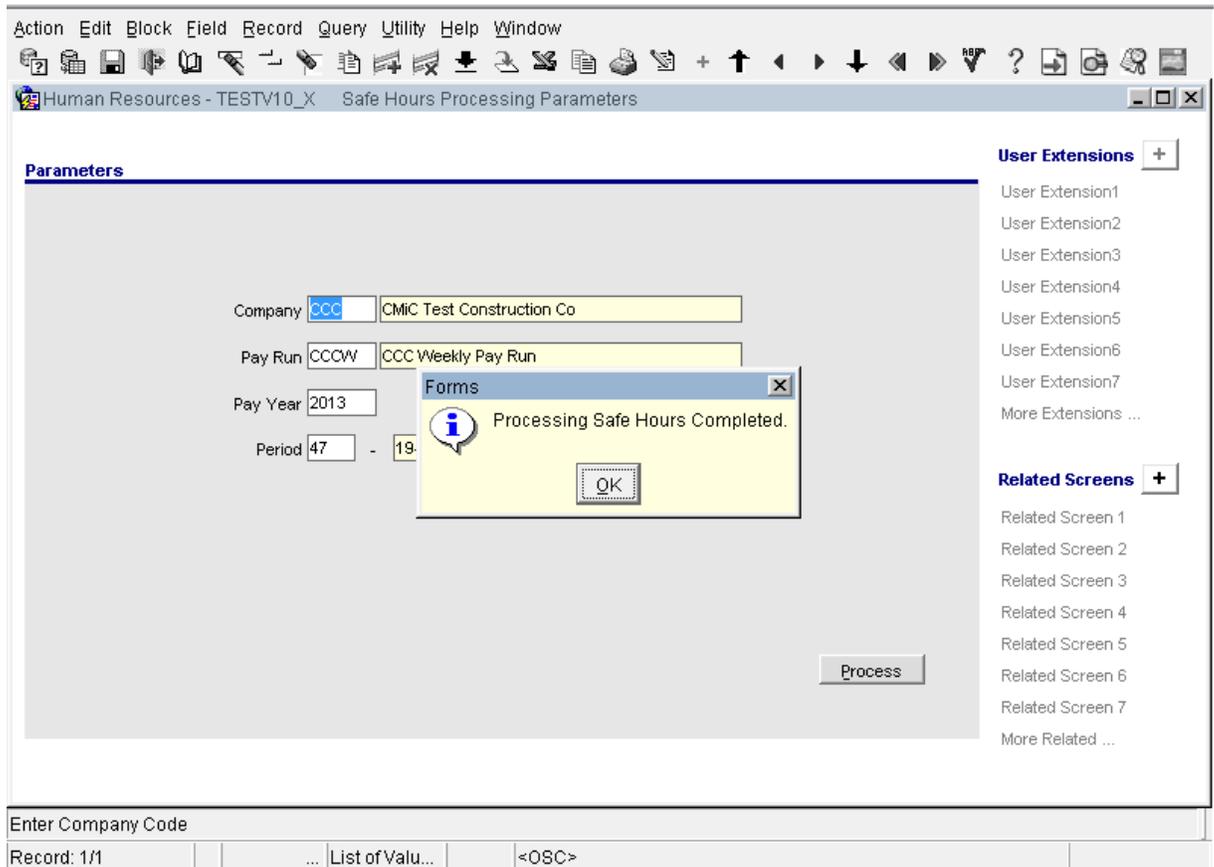
Related Screens

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRJOBSFH – Safe Hours By Job

This program can be used to inquire about a job’s Safe Hours accumulation and to make adjustments to it.

Safe Hours Processing



Pgm: HRSFHRS – Safe Hours Processing

This screen calls the program that updates the Safe Hours accumulators with the information in the timesheets for the current pay period.

Before processing the Safe Hours from HR menu in order to accumulate them user has to go through following steps:

Check Safety Certificate Flag for HR Position

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Positions Next Block

Code	Description	Short Description	Training Type	Safety Certificate	EEO Class
00055500	Mechanical Engineering	MECHENG	Regular Employee	<input type="checkbox"/>	057
100	President	President	Regular Employee	<input checked="" type="checkbox"/>	037
1001	Vice President	Vice President	Regular Employee	<input checked="" type="checkbox"/>	037
111	Truck Driver	Trk Driver	Regular Employee	<input checked="" type="checkbox"/>	804
1412	Accountant	Accountant	Regular Employee	<input checked="" type="checkbox"/>	023
142	Management Analyst	Mngmt Analyst	Regular Employee	<input checked="" type="checkbox"/>	026
1610	Architect	Architect	Regular Employee	<input checked="" type="checkbox"/>	043
1611	Marine Architect	Marine Architect	Regular Employee	<input checked="" type="checkbox"/>	058
1628	Civil Engineer	Civil Engineer	Regular Employee	<input checked="" type="checkbox"/>	053
1634	Industrial Engineer	Indust Eng	Regular Employee	<input checked="" type="checkbox"/>	056
164	Surveyors	Surveyors	Regular Employee	<input checked="" type="checkbox"/>	063
326	Photographers	Photographers	Regular Employee	<input checked="" type="checkbox"/>	189
350	Tin Smith	Tin Smith	Regular Employee	<input checked="" type="checkbox"/>	866
372	Draftsman	Draftsman	Regular Employee	<input checked="" type="checkbox"/>	217
4645	Receptionists	Receptionists	Regular Employee	<input checked="" type="checkbox"/>	319
4713	Payroll Clerk	Payroll Clerk	Regular Employee	<input checked="" type="checkbox"/>	338

Record: 0/1 ... <OSC>

In order to setup Safe Hours accumulation user has to follow a few steps:

1. Go to HR->Setup-> Position/Occupation Info -> Positions. On this screen, check the **Safety Certificate** checkbox against the position which will be accumulating Safe Hours.
2. Assign flagged position from this list to employee when creating a new employee in HR/HCM Tab of Employee Profile or by changing the position in Employee History.
3. Enter Timesheet Entry hours -> Post timesheet and Run the Payroll Processing.

After running the payroll processing, user has to run Safe Hours Processing for the same period as he's run the payroll. The accumulated safety hours can be seen in Safe Hours By Employee screen and/or Safe Hours by Job.

Print Safety Certificates

Human Resources - TESTV10_X Print Safety Certificates

Parameters

Pay Year Period

Reprint Safety Certificates

Print

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Count Hits

Record: 1/1 ... <OSC>

This screen creates reward certificates for employees who have reached certain threshold accumulations of safe hours, according to parameters currently found in the HR control file.

Safety Audit by Employee

Employee: CCC-WK-HR2, Richard Sherman

Date	Job	Final Score	Auditor Employee
13-09-2013	CCC 1000	50	CCC-WK-SAL1 Mark Reynolds

Company Name: CMIC Test Construction Co
Job Name: Project 1000 With Job Series 1000 (Forecast with A)
Comments: [Empty text area]

Enter The Comments For The Audit

Record: 1/1 <OSC>

This screen is used to enter safety audit information and includes the employee being audited, the date of the audit, the job code, the final (safety) score, auditor and comments.

The final score is a non-decimal number up to a maximum of 100 and can also be negative.

Safety Codes

All of the screens on the lower section of the *Safety* menu are used to maintain the codes that are used in reporting incidents. In each of these tables there is a Code to be used for selecting the item, a Description and a Short Description to be used where space is prohibitive.

Contributing Factors

One of these codes is required for each incident. They provide a classification of the causes of incidents.

Treatment Types

Use these codes to classify treatments.

Body Parts

These codes are used by the *Injury Analysis (545) Report*.

Incident Types

One of these codes is required for each incident. They provide a general classification of incidents.

Injury Types

Use these codes to classify injuries. These are used in the *OSHA* reports. To appear in the correct columns on the OSHA Report, specify the Injury Types from the options of:

- Injury
- Skin Disorders
- Respiratory Conditions
- Poisoning
- Hearing Loss
- Other Illnesses

Illness Types

One of these codes is required for each incident to reflect correctly on the OSHA 300 Report. They provide a general classification of illnesses. To appear in the correct columns on the OSHA Report, specify the Illness Types from the options of:

- Injury
- Skin Disorders
- Respiratory Conditions
- Poisoning
- Hearing Loss
- Other Illnesses

Incident Claim Local Tables

These following screens are to be populated with data that are then required by the Incident Entry screen for claim processing:

Accident Types

Liability Claim Types

Claim Policy Numbers

Auto Claim Types

Coverage Types

Utility Types

Treating Organizations

Incident Claim Maintenance

In order for CMiC to be able to track the individual cost components of an Incident, this screen is used to define the parameters of the MASTER CLAIM Job (the job is created for all claims). These parameters must be defined before posting of reserves in the incident claim can occur. A print of sample setup is shown below:

Master Claim Job

This is the Master Job against which the claims will be maintained.

Closed Job

This will be used as the incident claim job if the actual incident claim job is closed at the time of closing the incident claim.

The Phases, Categories, Accounts are pre-defined in the appropriate Local Tables in the Job Costing and General Ledger modules.

The phases and categories used must be defined for the same company as the Master Claim Job.

In order for CMiC to be able to track the individual cost components of an Incident (either WC or Liability) there will need to be unique Categories defined for each of the cost elements.

Reports

Report Menu Structure

Reports are grouped under submenus according to general function.

EEO Reports

EEO 257 (Employee Utilization Report)

This report is normally produced by job site, but it is possible to also produce summaries by region or state.

Parameters for this report are:

Company

Required.

Date From

Required. The earliest date for which pay history data will be included.

Date To

Required. The last date for which pay history data will be included.

Report Class ID

Required. Enter or select from the LOV one of the report IDs defined in the top block of the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.

Address

Optional. Enter or select from the LOV the site address of a specific job site. Only hours worked or employees working at this site will be included in the report. If a site address is specified here nothing can be entered in the Job, Master Job, State, and Regions fields. These fields are all mutually exclusive.

Job

Optional. Enter or select from the LOV a specific job. Only hours worked and employees working on this job will be included in the report. If a job is specified here nothing can be entered in the Address, Master Job, State, and Region fields. These fields are all mutually exclusive.

Master Job

Optional. Enter or select from the LOV a master job. Only hours worked and employees working on sub-jobs of this job will be included in the report. If a master job is specified here nothing can be entered in the Address, Job, State, and Region fields. These fields are all mutually exclusive.

Unlabelled LOV

Use this LOV to specify whether the report is to include just J-type hours (i.e. hours charged to jobs), just G-type (overhead) hours, or both. Clearly filtering by job or master job makes no sense if you select *Overheads only* here.

State

Optional. Enter or select from the LOV a specific state. Only hours worked or employees working in this state will be included in the report. If a state is specified here nothing can be entered in the Address, Job, Master Job, and Region fields. These fields are all mutually exclusive.

Region

Optional. Enter or select from the LOV a specific state. Only hours worked or employees working in this region will be included in the report. If a region is specified here nothing can be entered in the Address, Job, Master Job, and State fields. These fields are all mutually exclusive.

Summarize by

Options are to summarize by Site Address (the default and what is normally submitted to the government), State, or Region.

Note that for this report to be complete and meaningful you must have previously

- entered heading information using the Setup > Local Tables > Position/Occupation Info > EEO Job Site Address Information screen,
- defined EEO classifications using the Setup > Local Tables > Position/Occupation Info > EEO Classifications screen, and
- for the specified Report ID, mapped positions to the EEO classifications using the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.
- mapped jobs to locations, and mapped departments and locations to (site) addresses.

EEO 1391 (Federal Aid Contractors Annual Report)

This report is produced for each job site.

The parameters are:

Company

Required.

From Date

Required. The first date in the pay period being reported on.

To Date

Required. The last date in the pay period being reported on.

Report Class ID

Required. Enter or select from the LOV one of the report IDs defined in the top block of the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.

Address

Optional. Enter or select from the LOV the site address of a specific job site. Only employees working at this site will be included in the report.

Region

Optional. Enter or select from the LOV a region to which the report is to be restricted. Only site addresses in the specified region will be included in the report.

Note that for this report to be complete and meaningful you must have previously

- entered heading information using the Setup > Local Tables > Position/Occupation Info > EEO Job Site Address Information screen,
- defined EEO classifications using the Setup > Local Tables > Position/Occupation Info > EEO Classifications screen, and
- for the specified Report ID, mapped positions to the EEO classifications using the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.
- mapped jobs to locations, and mapped departments and locations to (site) addresses.

EEO 1 (or EEO 100) Employee Status Report

The screenshot shows a web application window titled "Human Resources - PTFV10X EEO Status Report (EEO 100)". The main content area is titled "Printing Options" and contains the following fields and options:

- EEO-1 Report Type:** A dropdown menu with "Expanded EEO-1 Report With Pa..." selected.
- Company:** A dropdown menu with "EEO-1 Report Without Pay Bands" selected.
- Report Classification:** A dropdown menu with "Expanded EEO-1 Report With Pay Bands" selected.
- Address Code:** A text input field.
- Region:** A text input field.
- From Date:** A date input field.
- To Date:** A date input field.
- Reporting Conditions:** Four checkboxes:
 - An EEO-1 report was previously filed for this establishment
 - This company has at least 100 employees in the reporting payroll period
 - Affiliated in an enterprise with total employment of 100 or more
 - This company or one of its establishments fulfills conditions from section C - 3
- Duns Number:** A text input field.
- Major Activity:** A text input field.
- Annual Pay Based On:** A dropdown menu with "Payroll Year Setup on Pay Period..." selected.

At the bottom right of the form is a "Print" button. On the right side of the window, there are two panels: "User Extensions" with a "+" icon and a list of "User Extension1" through "User Extension7" and "More Extensions ..."; and "Related Screens" with a "+" icon and a list of "Related Screen 2" through "Related Screen 7" and "More Related ...".

This is a consolidated report for the entire company, but it is possible to restrict it to include information for a single region, thereby obtaining a report for the region.

The parameters are:

EEO-1 Report Type

- **EEO-1 Report Without Pay Bands**
- **Expanded EEO-1 Report with Pay Bands** (pay bands and hours worked for reporting year)

From Date, To Date

The first and last date in the range being reported on.

Report Class ID

Enter or select from the LOV one of the report IDs defined in the top block of the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.

Region

Optionally enter or select from the LOV a region to which the report is to be restricted. Only employees who worked in the specified region during the specified period will be included in the report.

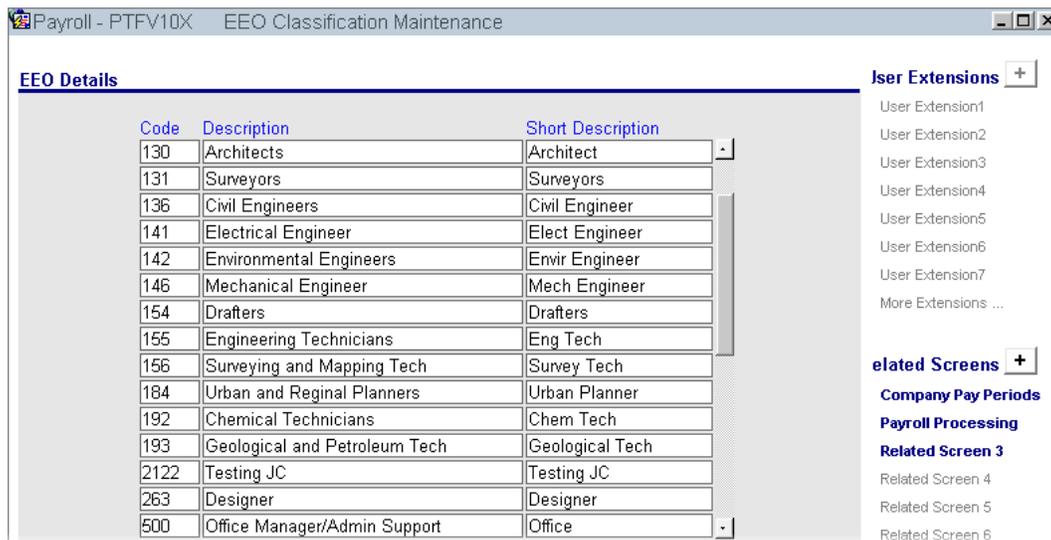
Note that for this report to be complete and meaningful you must have previously

- entered heading information using the Setup > Local Tables > Position/Occupation Info > EEO Job Site Address Information screen,
- defined EEO classifications using the Setup > Local Tables > Position/Occupation Info > EEO Classifications screen, and
- for the specified Report ID, mapped positions to the EEO classifications using the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.

For the region filter to work you must also have mapped jobs to locations, and mapped departments and locations to (site) addresses.

EEO-1 (EEO 100) Report Setup

EEO Classifications are set up in the EEO Classifications screen (*HR > Setup > Local Tables > Position/Occupation Info > EEO Classifications*):



The screenshot shows the 'EEO Classification Maintenance' window. It features a table with three columns: Code, Description, and Short Description. The table lists various EEO classifications such as Architects, Surveyors, Civil Engineers, Electrical Engineers, Environmental Engineers, Mechanical Engineer, Drafters, Engineering Technicians, Surveying and Mapping Tech, Urban and Regional Planners, Chemical Technicians, Geological and Petroleum Tech, Testing JC, Designer, and Office Manager/Admin Support. To the right of the table, there are sections for 'User Extensions' (listing User Extension1 through User Extension7 and More Extensions ...) and 'Related Screens' (listing Company Pay Periods, Payroll Processing, Related Screen 3, Related Screen 4, Related Screen 5, and Related Screen 6).

Code	Description	Short Description
130	Architects	Architect
131	Surveyors	Surveyors
136	Civil Engineers	Civil Engineer
141	Electrical Engineer	Elect Engineer
142	Environmental Engineers	Envir Engineer
146	Mechanical Engineer	Mech Engineer
154	Drafters	Drafters
155	Engineering Technicians	Eng Tech
156	Surveying and Mapping Tech	Survey Tech
184	Urban and Regional Planners	Urban Planner
192	Chemical Technicians	Chem Tech
193	Geological and Petroleum Tech	Geological Tech
2122	Testing JC	Testing JC
263	Designer	Designer
500	Office Manager/Admin Support	Office

Positions are set up and assigned EEO Classifications in the Positions screen (*HR > Setup > Local Tables > Position/Occupation Info > Positions*). Positions may be created using the Copy Trades To Positions utility in HR.

Human Resources - PTFV10X Positions

Detail

Code	Description	Short Description	Training Type	Safety Certificate	EEO Class
00002	Electrical Engineer	002	Regular Emplo...	✓	141
002	Electrical Engineer	002	Regular Emplo...	✓	141
100	President	President	Regular Emplo...	✓	NA
101	Vice President	Vice President	Regular Emplo...	✓	NA
11-1011	Chief Executives	CEO	Regular Emplo...	✓	NA
11-3121	HR Managers	HR Mgr	Regular Emplo...	✓	NA
1111	1111	1111	Regular Emplo...	✓	866
1221	Administrative Officer	1221	Regular Emplo...	✓	NA
13-1051	Cost Estimators	Estimators	Regular Emplo...	✓	500
140	Accountant	Accountant	Regular Emplo...	✓	510
160	Architectural Drafters	Arch Drafter	Regular Emplo...	✓	154
161	Civil Engineer	Civil Eng	Regular Emplo...	✓	136
17-2071	Electrical Engineers	Elect Eng	Regular Emplo...	✓	141
170	Surveyor	Surveyor	Regular Emplo...	✓	131
200	Receptionist	Receptionist	Regular Emplo...	✓	540
205-2	Accounting Clerk	205-2	Regular Emplo...	✓	NA

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Company Pay Periods

Payroll Processing

- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

A Report ID should be created for the type of report that you will be running in the Map Positions To EEO Classifications screen (*HR > Setup > Local Tables > Position/Occupation Info > Map Positions To EEO Classifications*). This Report ID determines which positions and EEO classifications will be considered when running the EEO report. The Report ID is one of the parameters that must be specified when printing the EEO 100 report. Enter a Report ID, Name and Short Name for the Report. In the 2nd block, each position that will be considered in the report must be mapped to an EEO Classification.

Human Resources - PTFV10X EEO Classifications

Report ID

Report ID: Name: Survey Job Classification List Short Name: EEO Report

Occupational Groups

EEO Class	Class Description	Position	Position Name
130	Architect	160	Architectural Drafters
131	Surveyors	170	Surveyor
136	Civil Engineer	161	Civil Engineer
154	Drafters	310	Draftsman
193	Geological Tech	300	Photographer
2122	Testing JC	2122	Testing Job Classification
510	Billing Collect	140	Accountant
514	Payroll Clerks	400	Payroll Clerk
540	Reception	200	Receptionist
623	Carpenters	800	Carpenter
633	Drywall/Ceiling	601	Drywall & Ceiling Tile Insta
866	Helper	600	Stonemason

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

Company Pay Periods

Payroll Processing

Related Screen 3

- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Address Codes should be defined in Global Tables > Address Codes:

System Tables Maintenance - PTFV10X Address Maintenance

Company Code

Company PYUS Marjan PYUS COMPANY

Address Detail

Address Code 001 LOFT Head Office

Street 750 Rodeo Drive

Suite # 1202

City Beverly Hills

State/Province CA California

Country US Zip/Postal Code 90210

Contact Name Mr. Richard Pattinson

Phone Number Fax Number

E-Mail

Territory

HR Region

Company Name LOFT Construction USA

Logo File Path On Web

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Company Pay Periods
- Payroll Processing
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Job information should also be created in the Setup > Local Tables > Position/Occupation Info -> EEO Job Site Address Information screen:

Human Resources - PTFV10X Job Information for EEO Reporting

Company

Company PYUS Marjan PYUS COMPANY

Job Information

Address Code 001 LOFT Head Office

Federal Funding Agency ABS Federal Funding

Minority Employment Goal 45.00

Female Employment Goal 45.00

Month of Peak Employment 9

Year of Peak Employment 2016

Expected Peak Employment 3,500

Subcontract

Type of Construction Hospital Building

Federal Aid Project Number AB67890

Beginning Construction Date 01032017

Dollar Amount Of Contract 100,000,000.00

Percent Complete 65.0000

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Company Pay Periods
- Payroll Processing
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Also, departments should be mapped to site addresses in the Setup > Local Tables > Department Setup screen in GL:

To run the report, there must be pay history data for the period that the report is being run in, and those employee's positions/trades should be in the "Map Positions To EEO Classification" screen.

VETS 100 (Veterans' Employment Report)

This report is a consolidated report for the entire company.

The parameters are:

Company

Required.

Date From

Required. The first date in the pay period being reported on.

Date To

Required. The last date in the pay period being reported on.

Report Class ID

Required. Enter or select from the LOV one of the report IDs defined in the top block of the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.

Note that this report includes information about both a specific pay period and the year ending with that pay period. The dates entered on the parameter form identify the pay period. The year is defined implicitly as the year ending on the last date of the pay period.

Note that for this report to be complete and meaningful you must have previously:

- entered heading information using the Setup > Local Tables > Position/Occupation Info > EEO Job Site Address Information screen,

- defined EEO classifications using the Setup > Local Tables > Position/Occupation Info > EEO Classifications screen, and
- for the specified Report ID, mapped positions to the EEO classifications using the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classifications screen.

EEO Classification Assignment Listing

This is a listing of the mapping from positions to EEO classifications for a single report ID.

Benefit Administration Reports

Job Change Report

The benefits and deductions specialist uses this report to determine which employees have moved between jobs that have different contractual benefits and deductions requirements. Typically, this involves a move between a prevailing wage (Davis-Bacon) job and a regular job. All fields are required for generating this report.

Company

Enter or select a company code.

Year

Defaults to the current year. Enter a payroll year.

Period

Defaults to the current period. Enter a period number.

Pay Run

Enter or select a pay run code.

The report lists all employees who worked on the last job in the previous period that was different than the first job worked in the specified period. For each employee it includes the following:

- Original and new job codes, with a checkbox indicating whether they are prevailing wage jobs
- Original and new site address codes
- The employee's pay group code
- The employee's years of service

Paid Non-working Employees Report

This program does not actually print a physical paper report. Instead it creates a CSV (comma separated variable) export file. Users can use their spreadsheet program to perform further custom data manipulation and formatting before printing out a hard copy report.

The report lists all employees who were paid but had no hours recorded in timesheets.

Parameter

Enter or select a company code.

Pay Run

Enter or select a pay run code.

Year

Defaults to the current year. Enter a payroll year.

Period

Defaults to the current period. Enter a period number.

File Path and Name

A valid path to a writeable folder and the name of a file to be written in that folder. A default value of C:\hr4003.csv is provided. We recommend that you retain the CSV extension so that your spreadsheet knows that this is a CSV file and decodes it accordingly.

Eligibility Audit

This report lists all employees who became eligible for pension benefits in the specified range of dates.

From

The earliest date in the range of interest

To

The last date in the range of interest

Safety Reports

Injury Analysis (545) Report

This is a consolidated report for the entire company.

Company

Enter or select the company to be reported on.

From Date

The earliest date in the range of interest. Its default value is the first day of the current year.

To Date

Enter the last date in the range of interest. The default value is today's date.

Region

Optionally enter or select from the LOV a specific Region to restrict the report to.

State

Optionally enter or select from the LOV a specific State to restrict the report to.

Note that this report prints data for the current year specified and the previous year.

In order for this report to be complete and meaningful you must have previously:

Set up address codes in Global Tables -> Address Code with an HR Region. Location codes must also be set up in Global Tables -> Location Code. The location code must be mapped to the address code and the address code should be included on the Safety Incident. The jobs specified on the incident must have the Location field on the Job Detail tab of the Job Setup screen. Jobs on incidents should have hours worked that are charged to the job in the year in which the report is being run. If the Recordable checkbox is

checked on the incident, then the incident will be included in the total Recordable Injuries column on the report. Also, Body Part on the Incident is listed on the report.

OSHA 300 Report

This is a consolidated report for the entire company.

Company

Enter or select the company to be reported on. Optionally enter or select the Site Address to be report on.

From Date

The earliest date in the range of interest.

End Date

Enter the last date in the range of interest.

HR Region

Optionally enter or select from the LOV a specific Region to restrict the report to.

Country

Optionally enter or select from the LOV a specific Country to restrict the report to.

State

Optionally enter or select from the LOV a specific State to restrict the report to.

If no Site Address is entered, the hours printed on the report are Base Wage hours worked between the From/To Dates for the company specified on the parameter screen. If a Site Address is entered, then you must have previously:

Set up address codes in Global Tables -> Address Code. Location codes must also be set up in Global Tables -> Location Code. The Location Code must be mapped to the Address Code and the report will be based on jobs whose job location is at the Site Address. The report then sums the Base Wage hours worked between the From/To Dates across the payroll company with the above jobs. The Injury Type, Illness Type, Body Part and Treatment Type from the Incident are printed on the report.

OSHA 300A Report

This is a consolidated report for the entire company.

Company

Enter or select the company to be reported on.

Address

Optionally enter or select the Company and Site Address to be reported on.

From Date

The earliest date in the range of interest.

End Date

Enter the last date in the range of interest.

HR Region

Optionally enter or select from the LOV a specific Region to restrict the report to.

Country

Optionally enter or select from the LOV a specific Country to restrict the report to.

State

Optionally enter or select from the LOV a specific State to restrict the report to.

Hours Worked By “Non-Employees”

Optionally enter the number of hours worked by non-employees.

Note that if no Site Address is entered, the hours printed on the report are Base Wage hours worked between the From/To Dates for the company specified on the parameter screen. If a Site Address is entered, then you must have previously:

Set up address codes in Global Tables -> Address Code. Location codes must be set up in Global Tables -> Location Code. The Location Code must be mapped to the Address Code and the report will be based on jobs whose job location is at the Site Address. The report then sums the Base Wage hours worked between the From/To Dates across all payroll companies with the above jobs. Hours Worked by Non-Employees on the parameter screen is also included in the “Total Hours Worked” on the report whether or not the Site Address is specified.

OSHA 301 Report

This is a consolidated report for the entire company.

Company

Enter or select the company to be reported on.

From Date

The earliest date in the range of interest.

End Date

Enter the last date in the range of interest.

HR Region

Optionally enter or select from the LOV a specific Region to restrict the report to.

Country

Optionally enter or select from the LOV a specific Country to restrict the report to.

State

Optionally enter or select from the LOV a specific State to restrict the report to.

The report prints incidents for each employee in the Company specified.

Other Reports

Earnings Breakdown by Period Report

This program produces for one employee at a time a breakdown of all of his hours and earnings by period and type of hours. Because the number and nature of the columns depends on what types of pay each employee actually earned this cannot be presented on a standard report. Thus, this program does not actually print a

physical paper report. Instead it creates a CSV (comma separated variable) export. Users can use a spreadsheet program to perform further custom data manipulation and formatting before printing out a hard copy report.

Company

Enter or select from the LOV the company for which the employee works.

Employee Number

Enter or select from the LOV the employee to be reported on.

Pay Run

Optional. Enter or select from the LOV a pay run that is used to determine the period breakdown for the year.

Start Date

The earliest date in the range of interest. Its default value is the first day of the year containing the last pay period.

End Date

The last date in the range of interest. Its default value is the last day of the year containing the last pay period.

Include all companies

Check this box if you want the output to include earnings from all companies that the employee worked for in the specified date range.

Include other Pay Runs

Check this box if you want to display all pay runs in the specified date range.

Output File Name

A valid path to a writeable folder and the name of a file to be written in that folder. A default value of C:\hr4003.csv is provided. We recommend that you retain the CSV extension so that your spreadsheet knows that this is a CSV file and decodes it accordingly.

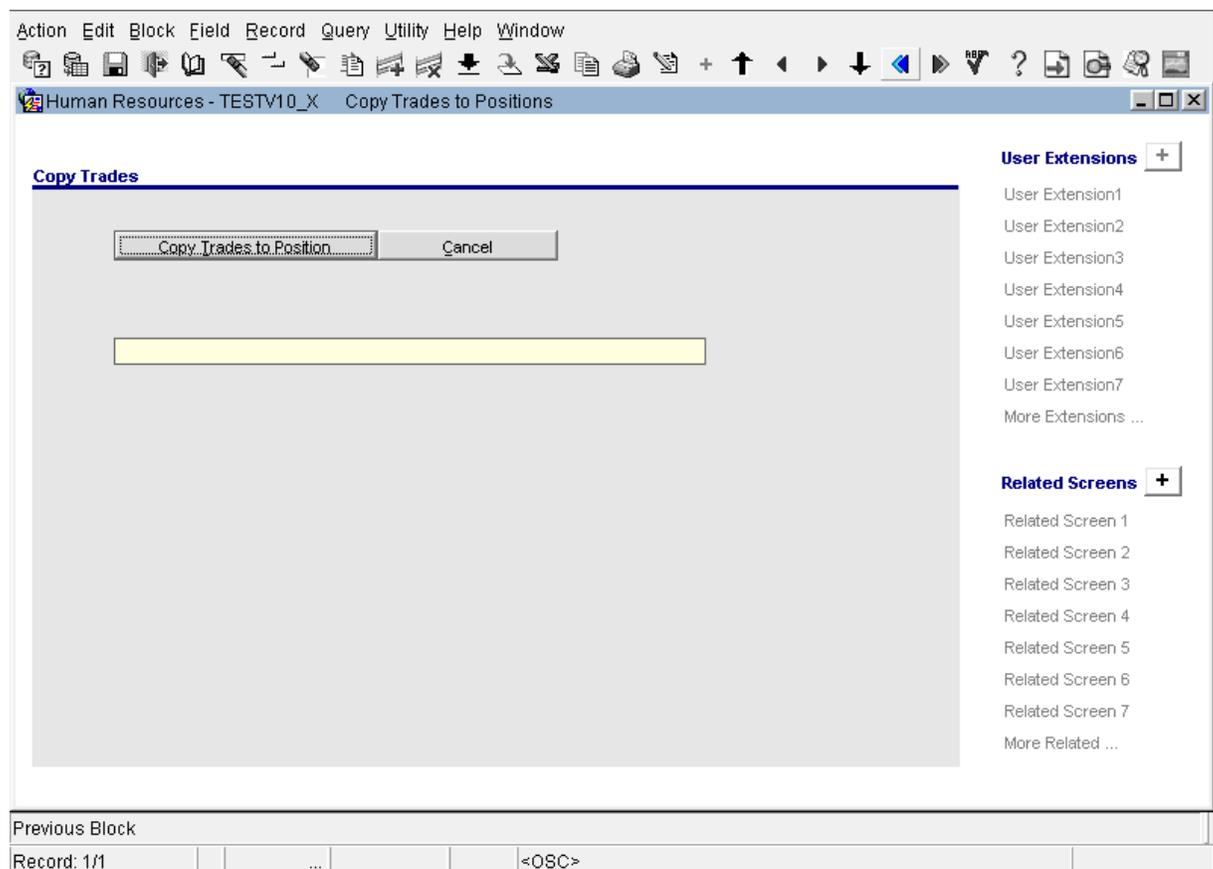
This report does not directly use the period numbers recorded in the pay history file. Instead it uses the specified pay run, or if that is null the employee's current pay run, to determine the period based on the date the pay was processed. This allows it to combine earnings from several different pay runs – even if the pay runs have different periods (e.g. weekly pay runs and annual bonus pay runs.)

Utility Functions

Overview – HR Utilities

There are several Utility functions in Human Resources that include functions to update Positions, Pension Eligibility, as well as exporting data such as Benefit/Deduction data, and the Year-End update to adjust Years of Service, Pensions and Leave information.

Copy Trades to Positions



Pgm: HRCOPY – Copy Trades to Positions

This screen contains only two buttons. Click on the **[Copy Trades to Position]** to copy newly entered trades to positions having the same codes and descriptions. Click on the **[Cancel]** button to exit without copying.

Processing Pension Eligibility

The screenshot shows a software interface for processing pension eligibility. The main window is titled 'Human Resources - TESTV10_X Eligibility Process'. It features a menu bar with 'Action', 'Edit', 'Block', 'Field', 'Record', 'Query', 'Utility', 'Help', and 'Window'. Below the menu is a toolbar with various icons. The main area is divided into a 'Parameters' section and a right-hand sidebar. The 'Parameters' section contains the following fields:

- Company: CCC (dropdown), CMIC Test Construction Co (text)
- Qualifying Hours: 500.00 (text)
- Qualifying Months: Minimum 6.00 (text), Maximum 12.00 (text)

A 'Process' button is located at the bottom right of the parameter area. The sidebar on the right has two sections: 'User Extensions' with a '+' icon and a list of 'User Extension1' through 'User Extension7' and 'More Extensions ...'; and 'Related Screens' with a '+' icon and a list of 'Related Screen 1' through 'Related Screen 7' and 'More Related ...'. At the bottom of the window, there is a status bar with the text 'Select Company Code', 'Record: 1/1', and '<OSC>'.

Pgm: HRELGPRO – Eligibility Process

This screen allows you to select the company for which the update is to be done. It also displays the parameters from the control file that are used by this update. When you click on the **[Process]** button the employees in the selected company that meet the eligibility criteria have their Pension Eligibility checkbox checked. This can be seen in the Benefits Administration > Pension Information screen as the Eligible checkbox. You can also run the Eligibility Audit Report to see the employees who became eligible in a given period.

This update should be run after each pay run is completed if you send regular updates to a pension plan operator.

Benefit or Deduction Export

Pgm: HRBDINFO – Benefit and Deduction Export

This screen is used to write two CSV (comma separated variable) files containing detailed information about the benefits of one or all employees and his/her/their dependents.

Company

Required. Enter or select from the LOV the company for which the export is being performed.

Pay Run

Required. Enter or select from the LOV the pay run for which the export is being performed. This is used to select a subset of employees.

Year

Required. The information will be that which is in effect at the time determined by the year and period. This defaults to the year of the most recent pay run.

Period

Required. The information will be that which is in effect at the time determined by the year and period. This defaults to the period of the most recent pay run.

Employee Number

Optional. If you want to get the information for only one employee enter his or her employee number here.

Path

Required and defaults to “C:\”. The folder or directories into which the export files are written.

Employee Information

Required and defaults to EMPINFO.CSV. The name of the output file containing details of the employees’ benefits and deductions.

Dependent Information

Required and defaults to DEPINFO.CSV. The name of the output file containing details of the employees’ dependents benefits and deductions.

Year-End Update

Update Parameters

Company CMIC Test Construction Co

New Year

Profit Sharing in New Year

Increment the Years of Service Count

Set the Basic and Carried Forward Vacation Hours

Set the Pension and Deferred Compensation Flags

Run this program at the beginning of each year to do the following:

1. Increment the years of service count.
2. Set the basic and carried forward vacation hours.
3. Set the Pension and Deferred Compensation flags.

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter Company Code

Record: 1/1 ... List of Valu... <OSC>

Pgm: HRVACUPD – Year-End Update

Run this program after the last pay run of the year to do the following:

- If applicable, it updates the years of service count for employees who have met the criteria of working enough hours to be credited with a year of service.
- It updates vacation hours based on the parameters specified in the Control file and Vacation Update Parameters.
- It sets the Pension and Deferred Compensation checkboxes that are used in printing W2 forms.

- The checkbox **“Increment Years of Service Count”** is disabled if the years of service update method selected in the HR Control is not option 1 (HR Year-End Utility).

You must specify the new year and the program will not process the same year twice.

The *Profit Sharing in New Year* box is checked if you know that there will be profit sharing distributed in the new year.

Plans Conversion from Payroll to Human Capital

The screenshot shows a software window titled "Payroll - TESTV10_X Conversion To HR". The window contains a "Conversion" form with the following elements:

- Type:** A dropdown menu currently set to "Deduction".
- To Code:** A text input field.
- From Code:** A text input field.
- Rule ID:** A text input field.
- Eligible ID:** A text input field.
- Message:** A text input field.
- Process:** A button to execute the conversion.

On the right side of the window, there are two panels:

- User Extensions:** A list of user extensions from "User Extension1" to "User Extension7", with a "More Extensions ..." link.
- Related Screens:** A list of related screens from "Related Screen 1" to "Related Screen 7", with a "More Related ..." link.

The bottom status bar displays "Enter To Code", "Record: 1/1", and "<OSC>".

This screen allows you to convert Benefits/Deductions from Payroll module to HR module.

HR Setup

Codes

The Codes submenu defines global (non company-specific) values that are used in various HR type records.

Status Codes

Code	Description	Short Description	Active Flag	Screen Title
ABSENT	Absent from class		<input type="checkbox"/>	Applicant
ENROLLED	Enrolled		<input type="checkbox"/>	Applicant
PRESENT	Present for class		<input type="checkbox"/>	Applicant
LVL1PASS	Level One Pass	LVL1PASS	<input checked="" type="checkbox"/>	Applicant
LVL2PASS	Level Two Pass	LVL2PASS	<input checked="" type="checkbox"/>	Applicant
24H	24 Hr.Cancellation		<input type="checkbox"/>	Applicant
CANCELLED	Cancelled		<input type="checkbox"/>	Applicant
DONE	Class has ended		<input type="checkbox"/>	Applicant
IN PROG	In progress		<input type="checkbox"/>	Applicant
NOSTART	Not yet started		<input type="checkbox"/>	Applicant
COMPLETE	Completed	Completed	<input checked="" type="checkbox"/>	Training
REVIEW	Under Review	Review	<input checked="" type="checkbox"/>	Training
SCHEDULE	Schedule	Schedule	<input checked="" type="checkbox"/>	Training
LTD	Long Term Disability	LTD	<input checked="" type="checkbox"/>	Medical
PASS	Pass	Pass	<input checked="" type="checkbox"/>	Medical

Description Of The Status

Record: 2/15 ... <OSC>

Pgm: HRSTATUS – HR Status Codes

Status Codes are used by the Applicant, Employee Profile, Employee Medical, Employee Training, and Items Issues to Employees screens in the HR system to classify information. The codes set up here specify which screen(s) they apply to.

Code

The code to be used to identify a status.

Description

The meaning of this status code.

Short Description

Enter a short description to be used throughout the HR system where the field space is limited.

Active Flag

Remove the check mark if you no longer want this status code to be available (i.e. visible in the LOVs for the status field) but do not want to remove this status code from existing records.

Screen Title

Select from the LOV the screen or screen family for which this code is applicable. Note that no two screens can have the same code.

Disability Codes

Code	Description	Short Description	Modify Work
LIFT < 50	Lifting Less than 50 lbs.	Lift < 50	<input checked="" type="checkbox"/>
LIFT > 50	Lifting More Than 50 lbs.	Lift > 50	<input type="checkbox"/>
NOLIFT	No Lifting	No Lifting	<input checked="" type="checkbox"/>
NONE	No Disability	None	<input type="checkbox"/>
STAND	Standing	Standing	<input checked="" type="checkbox"/>
VISION	Vision issues	Vision	<input checked="" type="checkbox"/>
BACK	Back Injury	Back Injuree	<input checked="" type="checkbox"/>
DEAF	Deaf	Deaf	<input checked="" type="checkbox"/>
DIABETIC	Diabetic	Diabetic	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Checked: Work Modification Is Required
Record: 9/9 ... <OSC>

Pgm: HRDISABL – HR Disability Codes

Pgm: HRDISABL – HR Disability Codes

Disability Codes are used in the *Applicant* and *Employee Profile* screens to specify the nature of possible disabilities that a person may have. The Disability Codes can be used as well in the Payroll application on the HR Info Tab when creating/editing Employee Profile in Payroll. The purpose of these codes is to provide reference to any medical or other types of disabilities that an employee may have.

Code

The Disability Code will be used in the forms to select a Disability when adding to an Employee or Applicant profile. This may be up to 10 characters in length.

Description

This is the long description for the Disability Code being defined.

Short Description

This is the Short Description that may be used where space is prohibitive.

Modify Work

This checkbox is used to identify disabilities that may impact what/where an employee or applicant may be able to work.

Rating Codes

Code	Value	Description	Short Description	Active Flag	Screen Title
AVERAGE	2	Average	Average	<input checked="" type="checkbox"/>	Applicant
EXCELLENT	4	Excellent	Excellent	<input checked="" type="checkbox"/>	Applicant
GOOD	3	Good	Good	<input checked="" type="checkbox"/>	Applicant
POOR	1	Poor	Poor	<input checked="" type="checkbox"/>	Applicant
FAILED	3	Fail	Fail	<input checked="" type="checkbox"/>	Medical
PASSED	1	Pass	Pass	<input checked="" type="checkbox"/>	Medical
RESTRICT	2	OK With Restrictions	Restrict	<input checked="" type="checkbox"/>	Medical
FAIL	2	Fail	Fail	<input checked="" type="checkbox"/>	Training
PASS	1	Pass	Pass	<input checked="" type="checkbox"/>	Training
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	

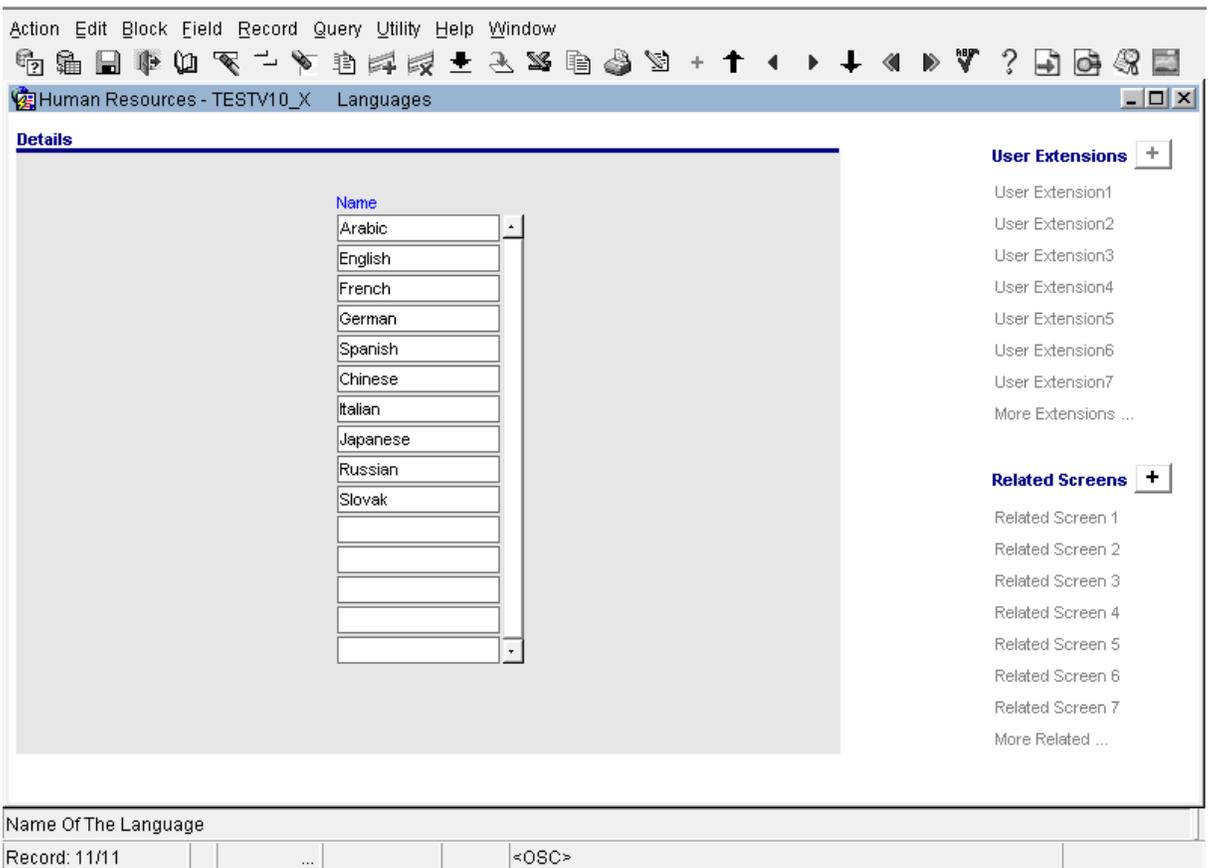
Enter A Rating Value Relative To Other Like Codes

Record: 1/9

Pgm: HRRATING – Rating Codes

Rating Codes are used to define standard ratings for applicants, medical ratings for test results for employees, and ratings for employee training.

Languages



Pgm: HRLANG – Language Codes

Languages are used in the *Applicant* and *Employee Profile* screens to identify preferred languages.

Work Modifications

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Work Modification Code Maintenance

Work Modification Codes

Code	Description	Short Description	Standard Frequency
BEND	No Bending	No Bending	<input checked="" type="checkbox"/>
DESK	Deskwork	Deskwork	<input checked="" type="checkbox"/>
HOME	Home Rest	Home Rest	<input checked="" type="checkbox"/>
LIFT-10	No Lifting Over 10 Lbs.	No Lifting	<input checked="" type="checkbox"/>
NOLIFT	No Lifting	No Lifting	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Identify The Work Modification

Record: 6/6 ... <OSC>

Pgm: HRWRKMOD – Work Modifications

Work Modifications are standard codes used to specify work restrictions. They are used by the *Employee Work Modifications* screen and displayed in the *Work Modification Agreement* documents.

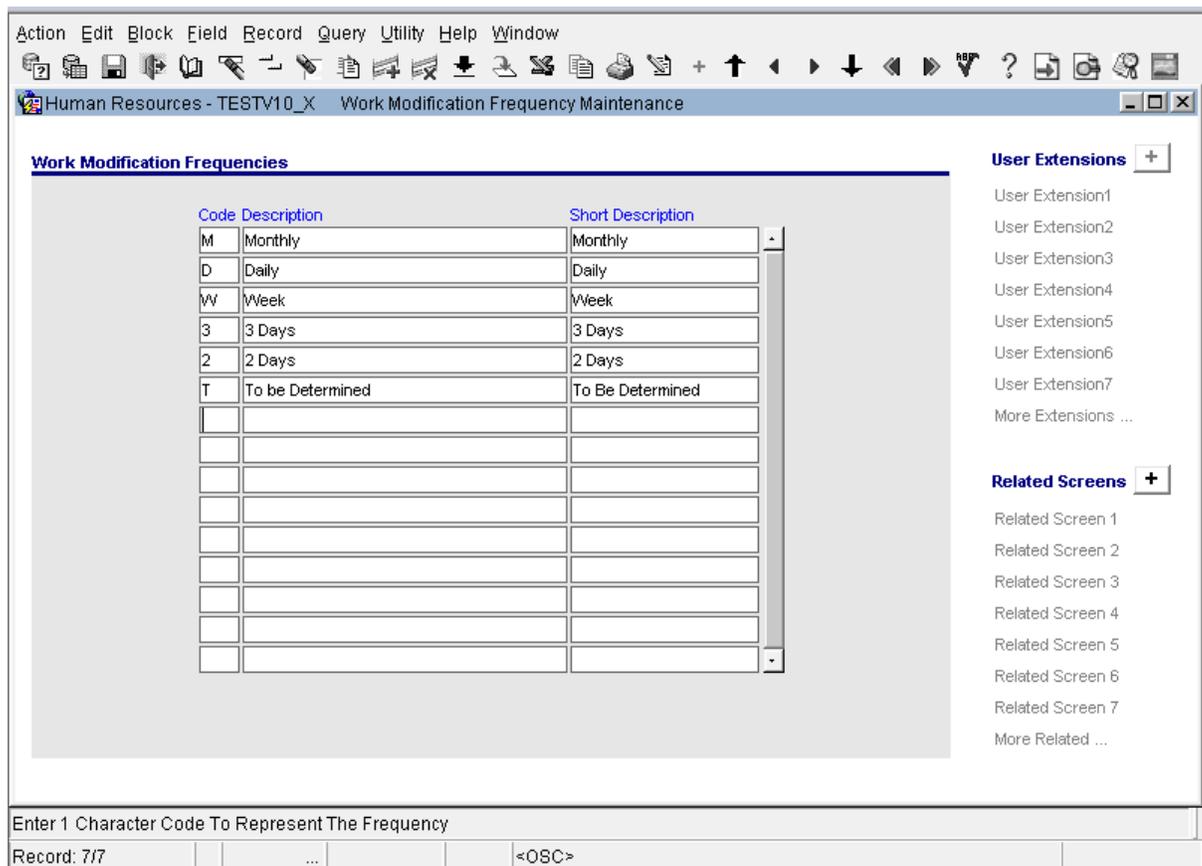
Code

The identifying code for this work modification type.

Description / Short Description

Enter the descriptions for this modification type. The Description may contain 30 characters, while the short description will allow only 16 and is only used where space is prohibitive.

Work Modification Frequencies



Pgm: HRWMFREQ – Work Modification Frequencies

Work Modification Frequencies are standard codes used in defining work modifications. They specify how frequently during a workday an employee may perform a restricted task. Typically they express concepts such as never, infrequently, occasionally, or ‘to be determined’.

Code

The identifying code for this work modification frequency can be 1 alphanumeric character.

Description / Short Description

Enter the descriptions for this modification frequency. The Description may contain 30 characters, while the short description will allow only 16 and is only used where space is prohibitive.

Education Course Codes

Action Edit Block Field Record Query Utility Help Window

Human Res Count Hits TV10_X Education Code Maintenance

Education Codes

Code	Name	Short Name	Level
HS	High School	High School	High school
CO	Technical College	Tech College	Apprentice business or vocational
IC	Industry Course	Ind Course	Apprentice business or vocational
BS	Business School	Business School	Apprentice business or vocational
			Elementary or grade school

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Record: 0/1 ... <OSC>

Pgm: HREDUCAT – Education Course Codes

Education Course Codes are used to define specific courses of study. They are used in the *Employee and Applicant Education* screen.

Education Degree Codes

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Educational Degrees

Enter Educational Degrees

Code	Name	Short Name	Level	Active
N/A	Not Applicable	Not Applicable	Not Applicable	<input checked="" type="checkbox"/>
SAFECERT	Safety Certificate	SafeCert	Apprentice business or vocational	<input checked="" type="checkbox"/>
TECHCERT	Technical Certification	Tech Cert	Apprentice business or vocational	<input checked="" type="checkbox"/>
GRADE	Grade School	Grade School	Elementary or grade school	<input checked="" type="checkbox"/>
ELEC.TRDE	Electrical Trades	Electrical	Apprentice business or vocational	<input checked="" type="checkbox"/>
ENGINEER M	Master of Engineering	Master Engineer	Masters degree	<input checked="" type="checkbox"/>
			Not Applicable	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Uniquely Identify The Degree

Record: 7/7 <OSC>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: HRDEGREE – Education Degree Codes

Education Degree Codes are used to define specific degrees earned by Employees and Applicants. They are used in the *Employee and Applicant Education* screen.

Performance Grades

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Grades for Performance Reviews

Performance Grades

Grade Meaning	
A	Superior
B	Above Average
C	Average
D	Below Average
E	Poor
F	Unacceptable

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

The Meaning Of The Grade (Up To 16 Characters)

Record: 6/6 ... <OSC>

Pgm: HRPRFGRD – Performance Grades

This screen is used to define grades for performance reviews. By default the codes A through F are supported. Users can change the meanings attached to these default codes, create new codes and associated meanings, and delete any of the default codes. The codes are limited to a single character; meanings can be up to 16 characters.

Local Table Setups

Control File

Control Parameters

Company CCC CMIC Test Construction Co

General Safety Pension OSHA

Format Mask For SSN 999"-99"-9999

Leave Code For Vacations VAC Vacation

Hours To Qualify For Vacation 160

Update Method For Years Of Service 2. Daily Process Based On Seniority Date

Hours To Qualify For Years Of Service 160

Display Warning for Duplicate Course or Certificate/License

Pension Eligibility Parameters

Qualifying Hours 500.00

Qualifying Months Minimum 6.00

Qualifying Months Maximum 12.00

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Employees Must Have Worked This Many Hours In The Previous Year To Qualify For Vacation

Record: 1/1 ... <OSC>

Pgm: HRCTRLFM – HR Control General Tab

The *Control* program is used to store company-specific default information used by HR. There are linkages between HR and the Enterprise Payroll (PY) programs; as a stand-alone module, some values in the HR Control program may be left blank because they are set up only in PY. An example of this is shown above: 'Leave Code for Vacations' is left blank.

General – Tab

Format Mask for SSN

To allow both US social security numbers (SSN) and Canadian social insurance numbers (SIN) to be formatted correctly, this field can be modified to the correct format. It defaults to the SSN format.

Leave Code for Vacations

This is used by queries and reports (e.g. staffing query) to determine which hours and pay are for vacation. It is also used by the year-end program to determine which leave type to reset and roll forward.

Hours to Qualify for Vacation

The year-end program uses this to determine which employees qualify for vacation in the next year.

Update Method For Years Of Service

The drop-down list “**Update Method For Years Of Service**” allows selection of the method to be used for updating or increasing employees’ years of service. There are two options:

- a) using the HR Year –End Utility (which is the original method) or
- b) by Seniority Date via the new Nightly Years of Service Update Process (Years of Service is increased based on seniority date and hours worked in the prior 12 months as of a given date – intended to be the current date, used by the nightly run).

Hours to Qualify for years of Service

This field is to be used to specify the number of hours required to qualify for years of service increase. It is mandatory when option 2 is selected from the ‘Update Method For Years Of Service’.

Display Warning for Duplicate Course or Certificate/License

When this checkbox is checked, a warning is displayed when a duplicate course or certificate/license is entered in the Training by Course and Employee Certification/Licenses screens for the same employee.

Pension Eligibility Parameters

The following parameters are all used by the Utility > Processing Eligibility program.

Qualifying Hours

The number of hours an employee must work to be eligible to be enrolled in the company pension plan.

Minimum Qualifying Months

The number of months an employee must work to be eligible to be enrolled in the company pension plan.

Maximum Qualifying Months

The maximum number of months that the employee may work to accumulate the qualifying hours.

Safety – Tab

Control Parameters

Company CCC CMiC Test Construction Co

General Safety Pension OSHA

Enter Text Type For Incident Reason(Codes) CCC-HR HR Reason Codes

Incident Number Mask

Number Of Hours To Issue Safety Certificate 10.00

Safety Certificate Dollar Value 1,000.00

Safety Certificate Is Valid For 36 Months

Safety Based On Controlling Job

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter The Certificate Dollar Value

Record: 1/1 ... <OSC>

Pgm: HRCTRLFM – HR Control Safety Tab

Programs in the *Safety* menu use these parameters.

Text Type for Incident (Reason) Codes

The Safety tab allows entry of a previously defined Text Type for Safety Incidents (Setup > Global Tables > Text Type). The associated Text Codes (Setup > Global Tables > Text Code) for the Text Type are used as values in the Reason field when entering an Employer's First Report of Incident (Safety > Enter Incidents).

Incident Number Mask

Set up the incident number format mask.

Number of Hours to Issue Safety Certificates

This parameter is used by the Safety > Print Safety Certificates program to determine the employees who should receive safety certificates and by how much to reduce their unused accumulation of safe hours.

Safety Certificate Dollar Value

This parameter is used by the Safety > Print Safety Certificates program to determine the value that should be printed on the certificate and stored in the database with the record of that certificate.

Safety Certificate is Valid for

This parameter is used by the Safety > Print Safety Certificates program to determine the value that should be printed on the certificate.

Safety based on Controlling Job

This parameter is used by the Safety > Process Safe Hours program to determine whether safe hours should be accumulated by sub-jobs or their master jobs.

Pension – Tab

The screenshot shows a software window titled "Human Resources - TESTV10_X" with a menu bar (Action, Edit, Block, Field, Record, Query, Utility, Help, Window) and a toolbar. The main area is titled "Control Parameters" and contains a "Company" field with "CCC" and "CMIC Test Construction Co". Below this are tabs for "General", "Safety", "Pension", and "OSHA". The "Pension" tab is active, showing several fields: "401K Deduction Code" (401K), "Loan 1 Deduction Code" (empty), "Profit Sharing Benefit Code" (empty), "Loan 2 Deduction Code" (empty), "Construct Benefit Code" (empty), "Loan 3 Deduction Code" (empty), "401K/Profit Sharing Earnings Base Code" (401K) with a dropdown menu showing "401k Wages", and "Benefit Hours Base Code" (BASE) with a dropdown menu showing "Base Wage". On the right side, there are sections for "User Extensions" (listing User Extension1 through User Extension7 and More Extensions ...) and "Related Screens" (listing Related Screen 1 through Related Screen 7 and More Related ...). At the bottom, there is a status bar with "Enter Deduction Code For Loan 1", "Record: 1/1", "... List of Valu...", and "<OSC>".

Pgm: HRCTRLFM – HR Control Pension Tab

OSHA – Tab

The screenshot shows a software window titled "Human Resources - TESTV10_X" with a menu bar (Action, Edit, Block, Field, Record, Query, Utility, Help, Window) and a toolbar. The main area is titled "Control Parameters" and contains a "Company" field with "CCC" and "CMIC Test Construction Co". Below this are tabs for "General", "Safety", "Pension", and "OSHA". The "OSHA" tab is active, showing a "Report" dropdown menu set to "OSHA 300". There are three large text input fields labeled "Header Note", "Attention Note", and "Footer Note". At the bottom of the OSHA tab is a field for "Hours Worked By 'Non-Employees'". To the right of the main form is a "User Extensions" list with items "User Extension1" through "User Extension7" and "More Extensions ...". Below that is a "Related Screens" list with items "Related Screen 1" through "Related Screen 7" and "More Related ...". At the bottom of the window, there is a status bar with the text "Enter Header Note For OSHA Reports" and "Record: 1/1".

Pgm: HRCTRLFM – HR Control OSHA Tab

The Control File OSHA (Occupational Safety and Health Act) tab contains fields to hold default values used in OSHA safety reports. There is a dropdown list containing three OSHA reports, and fields to enter text for Header Note, Attention Note, and Footer Note which will be displayed on the corresponding OSHA report. The last field is a default for Hours Worked by Non-Employees.

Skill Definitions

This submenu includes two options – Skills and Required Skills. This enables use of Skills when added to employee and applicant profiles to be considered when reviewing applicants for suitable positions.

Skills

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Skill Code Maintenance

Skill Codes

Code	Description	Short Description	Rate	WM
APP-WIR	Wiring Apprentice	App Wlr		
CABLER	Cabling	Cabling		
CRANE	Crane Operator	Crane Operator		
DRIVER	Truck Driver	Driver		
DRYWALL	Drywall, Mudding and Plasterin	Drywall	37.00	HR
ELECTRICAL	Electrician	Electrician		
FORKLIFT	Forklift	Forklift		
GLAZIER	Glazier	Glazier		
GROUNDS	Groundskeeper	Groundskeeping		
HVAC	HVAC Installer	HVAC Installer		
MECHANIC	Mechanic	Mechanic	27.75	HR
PAINTERS	Painters	Painters		
PLUMBING	Plumbing	Plumbing		
ROOFING	Roofing	Roofing	40.00	HR
RV-OIL	RV-OIL Mechanic	RV-OIL	45.00	HR
SUPERVISOR	Supervisor	Supervisor		
SURVEYOR	Site Surveyor	Site Surveyor		

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter Skill Code

Record: 1/? <OSC>

Pgm: HRSKILLS - Skills

Skill Codes can be attached to an applicant or employee directly in the Employee Profile or Applicant Information, and can be defined in as much detail as needed to support Company policy.

Code

Enter the Code to be used when referencing the skill being added/edited.

Description and Short Description

Enter a description and for use in limited space areas, the short description of this skill.

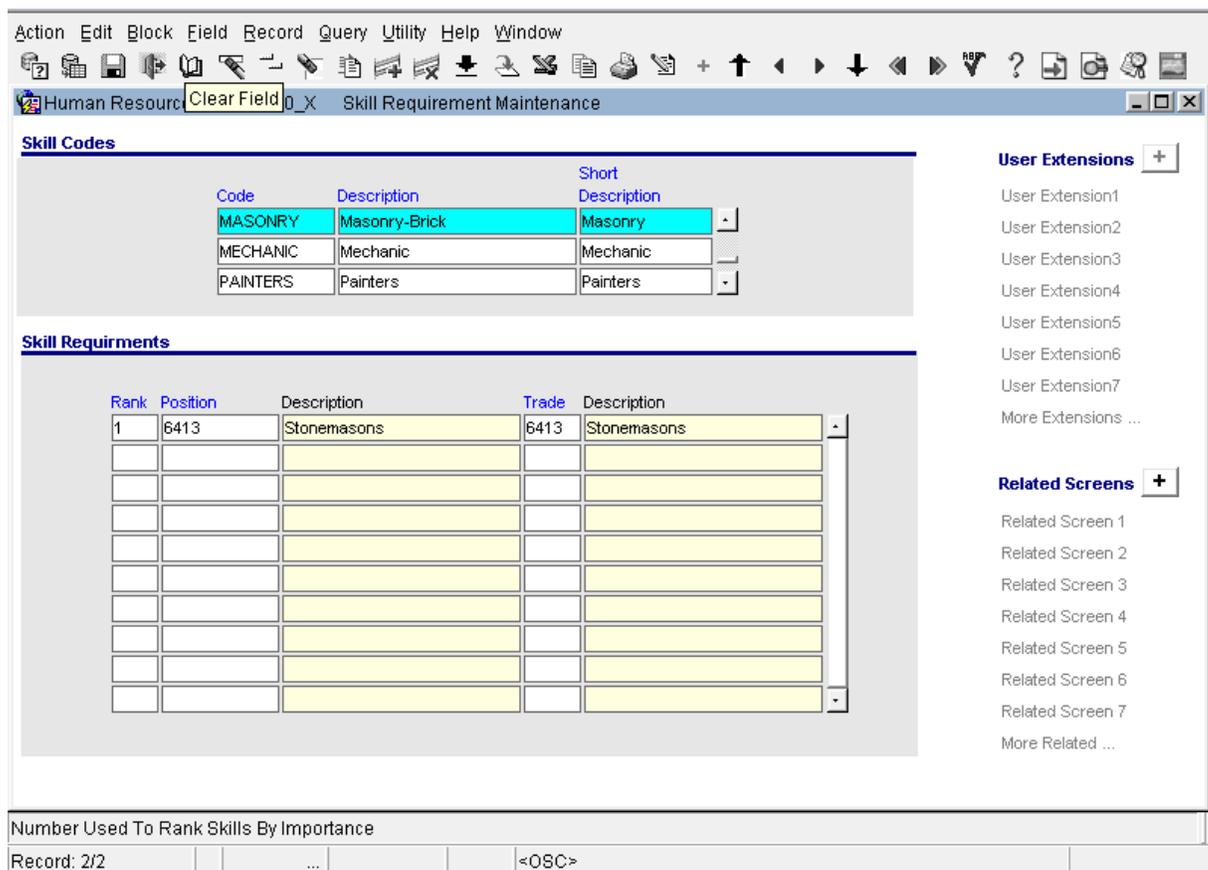
Rate

Enter an optional rate to be used for description and when entering Work Orders related to this skill.

WM

Enter an optional Weight/Measure code. Note that this will be used in Preventive Maintenance when recording work orders.

Required Skills



Pgm: HRREQSKL – Required Skills

Required Skills define the relationship between Skill Codes and HR Positions as well as PY Trades.

Skill Codes – Block

The Skill Codes Block in the header will display all trades that have been setup in Payroll or HR.

Skill Requirements – Block

The Performance Review screen uses this information to match reviewed employees with positions that they are qualified to occupy.

Rank

Optionally enter a number defining the relative importance of each requirement entered.

Position

Enter or select from the LOV a position for which the current skill is required.

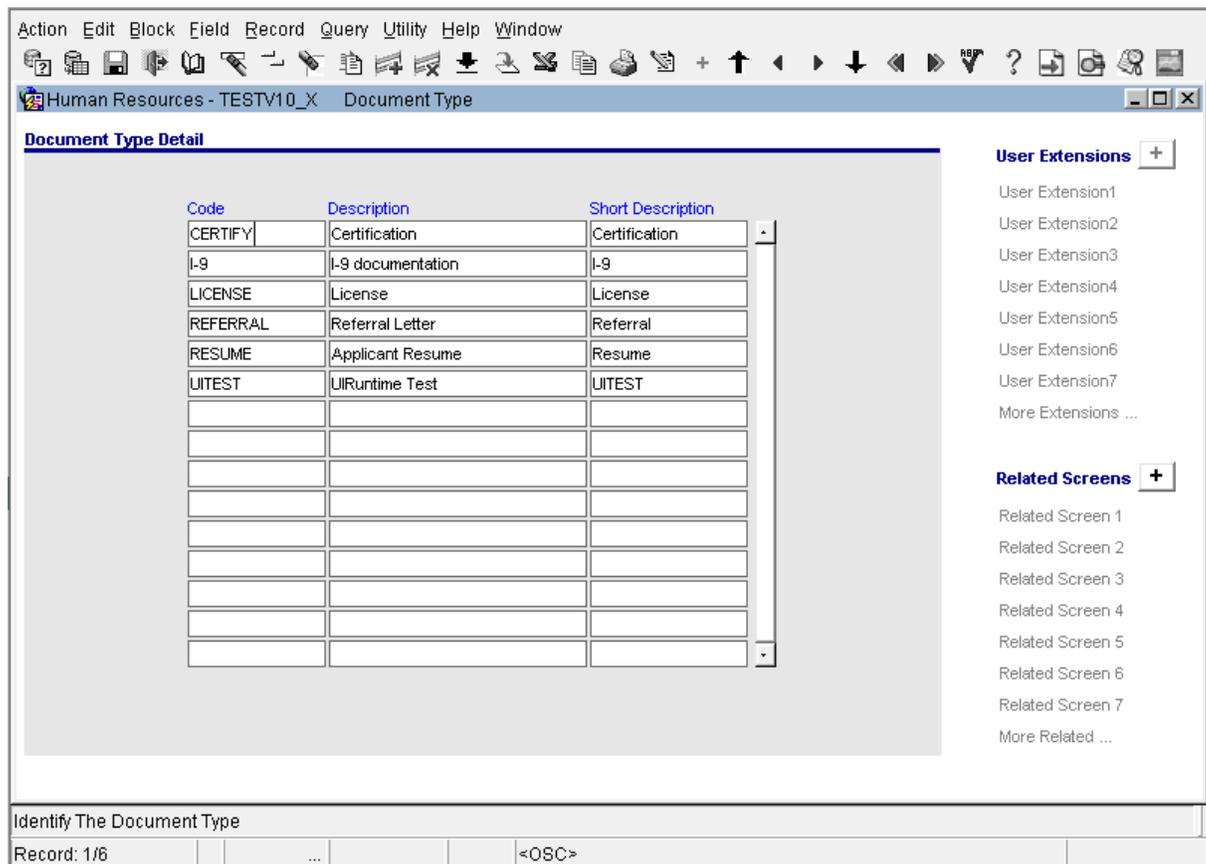
Trade

Enter or select from the LOV a trade for which the current skill is required or just “ALL”.

Documents

The Documents sub-menu includes two menus – Document Type and Documents. This enables defining various types of Documents as well as maintaining data related to those documents.

Documents – Document Type



Pgm: HRDOCTYP – Document Types

Document Types define codes for generic document descriptions and parameters attached to specific document types that are defined in the Document module.

Code

The identifying code for this document type, which can be up to 10 alphanumeric characters.

Description / Short Description

Enter the descriptions for this document type. The Description may contain 30 characters, while the short description will allow only 16 and is only used where space is prohibitive.

Renewal Cost

Enter the renewal cost for this document.

Exam Required

Identify if there is an exam required for this document or a renewal of it.

Organizations

Organization

Type Description Short Description

Educational Institution Requires Training
 Issues Memberships Requires Medical
 Issues Documents Performs Medical
 Requires Certification

Detail

Code Name Short Name

Address

Country State/Prov
County City

ZIP/Postal Code

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Next Record

Record: 5/? ... <OSC>

Pgm: HRORGANS - Organizations

The Organizations module can be used to define Educational Institutions (e.g. Applicant Information), Professional Associations (e.g. Applicant or Employee Memberships), Standards Bodies (e.g. Applicant Certifications), etc. The availability of the Organization entries in particular modules is defined in the upper Organization block. For instance, those entries checked as 'Educational Institution' would be available in LOVs such as Applicant Information/Education. The Organizations module is flexible in that the upper and lower blocks can be used to define Organization/Sub-organization hierarchies.

Organization – Block

Use this block to define either a type of organization (e.g. educational institution, hospital, professional associations, standards association) or an actual organization (e.g. professional association) for which you want to track departments or committees. The code and description are required; the short name is optional.

Detail – Block

If the Organization Block contains an organization type, enter the information describing the organizations of that type here. If the Organization Block identifies a specific organization, enter the information describing its departments or committees here (e.g. technical committees of a professional association that employees may belong to.) The code and description are required; the remaining information is optional.

Position/Occupational Information Menu

This submenu relates to the maintenance of Positions and Trades as well as information related to the EEO Classifications and Reporting.

Positions

Use the *Position Occupation Info > Positions* screen to define positions that employees may occupy. This form is available in both HR and Payroll.

The screenshot shows the 'Positions' screen in the HRPOSITN program. The window title is 'Human Resources - TESTV10_X Positions'. The screen displays a table of position details with columns for Code, Description, Short Description, Training Type, Safety Certificate, and EEO Class. To the right of the table are sections for 'User Extensions' and 'Related Screens', each with a plus sign icon. The status bar at the bottom indicates 'Record: 0/1' and '<OSC>'. The table data is as follows:

Code	Description	Short Description	Training Type	Safety Certificate	EEO Class
00055500	Mechanical Engineering	MECHENG	Regular Employee	<input checked="" type="checkbox"/>	057
100	President	President	Regular Employee	<input checked="" type="checkbox"/>	037
1001	Vice President	Vice President	Regular Employee	<input checked="" type="checkbox"/>	037
111	Truck Driver	Trk Driver	Regular Employee	<input checked="" type="checkbox"/>	804
1205	Marketing Manager	MARKETINGMANAG	Regular Employee	<input checked="" type="checkbox"/>	022
1412	Accountant	Accountant	Regular Employee	<input checked="" type="checkbox"/>	023
142	Management Analyst	Mngmt Analyst	Regular Employee	<input checked="" type="checkbox"/>	026
1610	Architect	Architect	Regular Employee	<input checked="" type="checkbox"/>	043
1611	Marine Architect	Marine Architect	Regular Employee	<input checked="" type="checkbox"/>	058
1628	Civil Engineer	Civil Engineer	Regular Employee	<input checked="" type="checkbox"/>	053
1634	Industrial Engineer	Indust Eng	Regular Employee	<input checked="" type="checkbox"/>	056
164	Surveyors	Surveyors	Regular Employee	<input checked="" type="checkbox"/>	063
326	Photographers	Photographers	Regular Employee	<input checked="" type="checkbox"/>	189
350	Tin Smith	Tin Smith	Regular Employee	<input checked="" type="checkbox"/>	866
372	Draftsman	Draftsman	Regular Employee	<input checked="" type="checkbox"/>	217
4645	Receptionists	Receptionists	Regular Employee	<input checked="" type="checkbox"/>	319

Pgm: HRPOSITN – HR Positions

The HRPOSITN program allows definition of company positions (although the definitions are not company-specific). While the codes and descriptions are specified by a company's HR policies, each position must be related to an EEO (Equal Employment Opportunity) class for reporting purposes. Typically, if the Payroll (PY) modules are used in conjunction with HR, the Position Codes are actually Trade Codes defined in PY.

Code

The alphanumeric code identifying this position.

Description

Enter the full description of this position.

Short Description

An abbreviated description of the position used where space is prohibitive.

Training Type

For use in some EEO reports (e.g. EEO 257), specify whether this position is occupied by a regular employee, apprentice, trainee, or student.

Safety Certificate

Check this to indicate that occupants of this position are eligible to receive safety awards.

EEO Class

Required but not used. Make sure that EEO class N/A (not applicable) is defined using the Setup > Local Tables > Position/Occupation Info > EEO Classifications screen, and use this here. This information has been superseded by the more flexible report-dependent mapping of positions to EEO classes that is defined using the Setup > Local Tables > Position/Occupation Info > Map Positions to EEO Classes program.

EEO Job Site Address Information

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X Job Information for EEO Reporting

Save

Company

Company CCC CMIC Test Construction Co

Job Information

Address Code CCC1 CCC1 Address

Federal Funding Agency Housing and Urban Development

Minority Employment Goal 5.00

Female Employment Goal 3.00

Month of Peak Employment 6

Year of Peak Employment 2013

Expected Peak Employment 15

Subcontract

Type of Construction Site Development

Federal Aid Project Number HUD0001

Beginning Construction Date 01-01-2013

Dollar Amount Of Contract 500,000.00

Percent Complete .0000

User Extensions +

User Extension1
User Extension2
User Extension3
User Extension4
User Extension5
User Extension6
User Extension7
More Extensions ...

Related Screens +

Related Screen 1
Related Screen 2
Related Screen 3
Related Screen 4
Related Screen 5
Related Screen 6
Related Screen 7
More Related ...

Enter Expected Peak Employment.

Record: 1/1 <OSC>

Pgm: HREEOJOB – EEO Job Work Location

This information is used in the headings of the EEO reports. This program allows for the entry of parameters associated with EEO-type jobs. The Address Code is defined in Setup > Global Tables > Address Code, and the rest of the fields are free-form. The same Address Code can be entered on to an employee's profile on the HR Info tab, thus linking employees to EEO information. The information entered through this program will be used in EEO Reporting (EEO 257, 1391, 100; see Reports Menu).

EEO Classifications

Action Edit Block Field Record Query Utility Help Window

Payroll - TESTV10_X EEO Classification Maintenance

EEO Details

Code	Description	Short Description
008	Personnel & Labor Relation Mgr	Labor Relations
018	Property Manager	Property Manager
022	Managers and Administrators	Manager/Admin
023	Accountant/Auditor	Accountants
025	Other Financial Officers	Financial Office
026	Management Analyst	Mgmt Analyst
027	Personnel, Trainers	Trainers
037	Management	Management
043	Architects	Architect
053	Civil Engineer	Civil Eng
056	Industrial Engineer	Industrial Eng
057	Mechanical Engineer	Mech Engineer
058	Marine and Naval Architects	Marine Architect
063	Surveyors	Surveyors
075	Geologists	Geologists

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter The Required EEO Class

Record: 1/? ... <OSC>

Pgm: PYEEOCLS – EEO Classifications

This program accepts Codes (defined by the EEOC) plus Description and Short Description parameters for EEO positions. The codes are used in the HR Positions program (HRPOSITN).

Map Positions to EEO Classifications

Action Edit Block Field Record Query Utility Help Window

Human Resources - TESTV10_X EEO Classifications

Report ID

Report ID Name Short Name

Occupational Groups

EEO Class	Class Description	Position	Position Name
023	Accountants	1412	Accountant
026	Mgmt Analyst	142	Management Analyst
043	Architect	1610	Architect
053	Civil Eng	1628	Civil Engineer
056	Industrial Eng	1634	Industrial Engineer
057	Mech Engineer	5003	Mechanical Engineering
063	Surveyors	164	Surveyors
189	Photographers	326	Photographers
567	Carpenter	6510	Carpenter
573	Drywall Install	6424	Drywaller
575	Electrician	6432	Electrician
804	Truck Drivers	TRUC	Truck Driver

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Name Of A Group Used For EEO Reporting

Record: 1/1 ... <OSC>

Pgm: HRPOGRPT – EEO Position Mapping

This program is used to specify how to group employee occupations in the various EEO reports.

For each report ID this screen creates a separate mapping of positions to EEO Classifications. All fields in both blocks are required.

For any report ID each position may appear at most once. However several positions may be mapped to the same EEO Classification.

Regions

The screenshot shows a software window titled "Human Resources - TESTV10_X HR Region Maintenance". The main area is titled "Regions" and contains a table with two columns: "Code" and "Region Name". The table has 15 rows. The first four rows contain data: ZCH, Company ZZ - Chicago Region; FL, Florida Region; NY, New York Region; and COL, Colorado Region. The remaining 11 rows are empty. To the right of the table is a "User Extensions" section with a "+" icon, listing "User Extension1" through "User Extension7" and "More Extensions ...". Below that is a "Related Screens" section with a "+" icon, listing "Related Screen 1" through "Related Screen 7" and "More Related ...". At the bottom of the window, there is a status bar with the text "Enter a 1 To 4 Character Region Code.", "Record: 1/4", and "<OSC>".

Code	Region Name
ZCH	Company ZZ - Chicago Region
FL	Florida Region
NY	New York Region
COL	Colorado Region

Pgm: HRREGION – HR Regions

Use this screen to define the regions used in Human Resources Reporting. These regions are used in EEO reporting and can be used to qualify benefit coverage by area. They are referenced in the Employee Profile (HR Info tab), the global (Site) Address table, and Incident reports.

Referral Sources

Code	Description	Recruiter Fee Type	Recruiter Fee/Percent	Preferred Source	Employee Referral	Warranty
CST	Chicago Sun Times			<input type="checkbox"/>	<input type="checkbox"/>	
EC	Eagle Consulting	Percentage	0.30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	60
EMP	Employee Referral	Fee		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
MP	Man Power	Percentage	0.35	<input type="checkbox"/>	<input type="checkbox"/>	30
NYT	New York Times	Fee	400.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	60
PPS	People Search	Percentage	0.25	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30
RH	Robert Half	Fee	300.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	90
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="checkbox"/>	<input type="checkbox"/>	

Enter Up To 4 Character Code To Represent Referral Source

Record: 1/7

Pgm: HRAPSRC – Applicant Referral Sources

‘Referral Sources’ are records that define how an applicant came to the attention of the HR department, and are used in the Applicant Information program.

Code / Description

Enter a referral code of up to 4 characters, and a free format name or description for the source.

Recruiter Fee Type

Indicates how you compute the finder’s fee if you hire an applicant from this source. It may be null (no fee), 'Fee' if you pay a flat fee, or 'Percent' if paying a percentage of applicant wages.

Recruiter Fee / Percent

The amount (if the fee type is Fee) or percent of applicants wages (if the fee type is Percent) to be paid to the person or company that referred this applicant to you.

Preferred Source

Check this box if this source is a preferred source to use.

Employee Referral

Check this box if this source is an employee referral.

Days to Bonus

Applicable only if the Employee Referral box is checked. This is how long the applicant must remain on staff before you pay the referring employee his/her finder's fee.

Classifiers

Classifier	Field Name	Field Value	Default Value
Classifier 1	EMP_NUM	Employee Number	CCC-WK-HR2 Richard Sherman
Classifier 2			
Classifier 3			
Classifier 4			
Classifier 5			
Classifier 6			

Pgm: PMCLSFM

This program was created for the Project Management module and allows the definition of extra fields to be associated with particular forms. Here, the form says that the field EMP_NUM (Employee Number) is to be associated with the Incident form in HR (Safety > Enter Incidents). That form will then contain the Employee Number field in the Classifiers tab of the form.

Global Tables

Note the special relevance of three of these global tables to the Human Resources application.

Address Code

Company Code

Company CCC CMIC Test Construction Co

Address Detail

Address Code CCC1 CCC1 Address

Street 456 Constructions Site Boulevard

Suite

City Chicago

State/Province IL Illinois

Country US Zip/Postal Code 60609

Contact Name Site Manager

Phone Number 800-555-1535 Fax Number

E-Mail site.manager@ccc.com

Territory

HR Region

Company Name CMIC constructions

Logo File Path On Web

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Company Logo File Path - Only Applicable To JB/PM Reports. It Uses The Correspondence Address On The Project If It Exists

Record: 1/1 ... <OSC>

Pgm: ADDRESS

This is referred to as Site Address in HR and is used to specify the work site of each employee. Safety and EEO reporting are done according to site address, rather than by job because several jobs/sub-jobs may be in progress at a single site.

Region

Action Edit Block Field Record Query Utility Help Window

System Tables Maintenance - TESTV10_X Province/State Maintenance

Province/State Codes

Province/State Code	Name	Compliance Code
BC	British Columbia	
BCN	Baja California	
BCS	Baja California del Sur	
CA	California	
CAM	Campeche	
CHH	Chihuahua	
CHP	Chiapas	

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Jurisdictions

Code	Description	Type	Tax Percent
CA-CITY	CA-CITY	City Tax	1.750
CA-COUNTY	CA-COUNTY	District Tax	.500
CA-SCHOOL	CA-SCHOOL	School Tax	1.500
CA-STATE	CA-STATE	School Tax	6.500

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Enter Region Code

Record: 10/? ... <OSC>

Pgm: REGFM - Region

Do not confuse this Region Module with the Region located in HR Setup > Local Tables > Regions. This table is actually one of two (see PY Manual) used to set up States/Provinces.

Territory

Action Edit Block Field Record Query Utility Help Window

System Tables Maintenance - TESTV10_X Territory Maintenance

Company

Company CCC CMIC Test Construction Co

Territory Detail

Code	Name	Control Code	Name
CHIC	Greater Chicago		
NC	North Central		
NY	New York Greater Area		

Enter The Territory's Controlling Territory.

Record: 3/3 ... <OSC>

User Extensions +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

Related Screens +

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Pgm: TERRFM - Territories

Territories are another HR classification present as a field on the Employee Profile. One place that territories can be used is in Benefit Administration Coverage Areas (Benefit Administration > Benefit and Deduction Administration > Coverage Areas).

Frequently Asked Questions

Benefits and Deductions

Is Payroll or Human Resources preferred for the setting up of Benefits and Deductions?

The primary Benefits and Deductions setups are identical in both the HR and Payroll modules. There is however, an additional system in HR for the setting up of Benefits and Deductions commonly referred to as the Benefit/Deduction Eligibility System. This version is more along an automated election system though the support tables are similar, and items in both systems are frequently interchangeable in administration.

Applicants and Employees

Are Applicant Entries required for Employees?

Depending on your company procedures, there may be a requirement that all applicants are entered into the HR Application and converted to Employees when hired. However, this is optional from a system aspect, and Employees can be created without Applicant entry in either HR or Payroll.

Index

A

Account Maintenance.....	61
Annualized Wages.....	51
Applicant Documents.....	78
Applicant Information.....	71
Applicants.....	71
Applicants - Menu.....	2
Applicants and Employees.....	183
Application Date.....	71
Asset Class Codes.....	26
Asset Tracking.....	19

B

Benefit Administration Reports.....	135
Benefit and Deduction Base Elements.....	49
Benefit and Deduction Bases.....	48
Benefit and Deduction Plan Options.....	48
Benefit and Deduction Plans.....	47
Benefit and Deduction Setup.....	62
Benefit and Deduction Table Base.....	53
Benefit or Deduction Export.....	143
Benefit Query.....	35
Benefit/Deduction Administration.....	35
Benefits.....	38
Benefits Administration - Menu.....	2
Benefits and Deductions.....	183
Body Parts.....	124

C

Career Plan Codes.....	157
Check Safety Certificate Flag for HR Position.....	121
Classifiers.....	179
Classify - Tab.....	109
Closing Out an Incident Claim.....	116
COBRA.....	47
COBRA and Receivables Parameters.....	55
COBRA Mail-Merge.....	57
Codes.....	147

Company Benefits.....	39
Company Deductions.....	44
Contributing Factors.....	124
Control File.....	161
Copy Trades to Positions.....	141
Courses Required by Positions.....	89
Coverage Area Administration.....	60

D

Deductions.....	42
Dependent.....	144, 172
Dependent Benefits.....	41
Dependent Deductions.....	45
Description - Tab.....	110
Detail - Block.....	65
Disability Codes.....	148
Discipline Tracking.....	26
Documents.....	14, 168
Documents.....	78
Documents.....	152
Documents - Document Type.....	168
Documents - Documents.....	169
Dominant Hand.....	9, 74, 96

E

Earnings Breakdown by Period Report.....	138
education.....	77
Education.....	10
Education Course Codes.....	155
Education Degree Codes.....	156
EEO 1 (or EEO 100) Employee Status Report.....	129
EEO 1391 (Federal Aid Contractors Annual Report).....	128
EEO 257 (Employee Utilization Report).....	127
EEO Classification Assignment Listing.....	135
EEO Classifications.....	174
EEO Job Site Address Information.....	173
EEO Reports.....	127
Eligibility Administration.....	59, 68
Eligibility Rules.....	59, 66
Employee Benefits.....	40
Employee Certification / Licenses.....	86
Employee Deductions.....	44
Employee Exposure Report.....	103
Employee History.....	10
Employee Profile.....	7
Employee Query.....	5
Employee Receivables Mail-Merge.....	57
Employee Relatives.....	16
Employees by Item.....	22
Entering Incidents.....	107
Environmental Conditions.....	100
Environmental Conditions Entry.....	101
Environmental Conditions Query.....	102
Environmental Conditions Setup Screens.....	100
Ethnic Group.....	74
Example 1: Non-Taxable Life Insurance Benefit.....	51
Example 2: Taxable Life Insurance Benefit.....	52

F

Frequency Codes	151
Frequently Asked Questions.....	183

G

General - Tab.....	112
Global Tables	180

H

HR Overview.....	1
HR Setup.....	147

I

Illness Types.....	125
Incident - Tab	107
Incident Claim Local Tables.....	125
Incident Claim Maintenance.....	126
Incident Types	125
Injury Types	125
Items By Employee.....	21
Items By Employee/Applicant.....	19

L

Languages	150
Layoff	7, 57
Leave	51, 57, 141, 162
Liability Info, Liability Reserves, WC Reserves - Tabs (Incident Claim Reserves).....	113
Local Table Setups.....	161

M

Maintain and Schedule Classes.....	84
Maintain Asset Items	24
Map Positions to EEO Classifications	175
Master - Block	62
Master Benefits.....	38
Master Deductions	43
Medical	91
Medical - Menu	3
Medical Attention - Tab	111
Medical Checkup Types.....	105
Medical Query.....	95
Medical Results by Employee or Applicant.....	91
Medical Results by Test	93
Medical Test Descriptions	104
membership.....	77, 154, 169
Membership.....	12
Membership Types	154
Menu Groupings	2

Military Status	9, 74
Minimums and Maximums	46

O

Organizations	170
Other Reports	138
Overview - HR Utilities	141
Overview of Benefit and Deduction Eligibility	59

P

Pension Information	54
Performance	6, 9, 33, 83, 167
Performance Grades	158
Performance Review	27
Personnel	5
Personnel - Menu	2
Plan Administration	70
Plans Conversion from Payroll to Human Capital	145
Position/Occupational Information Menu	171
Positions	171
Print Safety Certificates	122
Print Work Modification Agreement	99
Processing Pension Eligibility	142

R

Rating Codes	149
Receivables	43, 64
Reconcile Safety Certificates	123
Referral Sources	178
region	8, 97, 108, 113, 136, 137, 138
Regions	177
Relationship	102
Relative	77, 167
Relative Relationship Codes	18
Re-opening an Incident Claim	117
Report Menu Structure	127
Reports	127
Reports - Menu	3
Required Skills	167
Requisition Type	159
Reserves versus Actual Costs - Setup & Processing	114
Resident Status	74
Rules Detail - Block	66

S

Safe Hours by Employee	118
Safe Hours by Job	119
Safe Hours Processing	120
Safety - Menu	3
Safety Audit by Employee	124
Safety Codes	124
Safety Menu	107

Safety Reports	136
Skill Definitions	165
Skills	166
Skills Achieved by Certifications	88
Staffing Inquiry	31
Status Codes	147
Suitable Positions for Employees	34

T

The HR Main Menu	1
Training and Certifications	79
Training by Course	81
Training by Employee	82
Training Courses and Modules	79
Training/Certification - Menu	3
Transaction Types and Codes	50
Treatment Types	124
Types of Certification or Licenses	85

U

Union Benefits	40
Union Deductions	44
Utility - Menu	3
Utility Functions	141

V

Vacation Update Parameters	176
VETS 100 (Veterans' Employment Report)	134

W

Work History Query	33
Work Modification Frequencies	153
Work Modifications	96, 152
Working	17, 108, 135, 144

Y

Year-end Update	144
-----------------------	-----
