HR and Employee Management

Employee Documents	Employee Certifications*	Company Assets*	Disciplinary Actions*
Go to > Employee Management > Human Resources> Employee Documents	Go to > Employee Management > Human Resources> Certifications	Go to > Employee Management > Human Resources>Company Assets	Go to > Employee Management > Human Resources>Disciplinary Actions
To upload employee documents: 1. Open employee record 2. Click add a new document in the blue action bar 3. Select document type 4. Add description 5. Upload file 6. Choose access level 7. Choose Save Note: If using electronic onboarding documentation will appear under employee documents for verification and record retention.	To track employee certifications: 1. Open employee record 2. Click add a new in the blue action bar 3. Choose certification 4. Complete related fields including expiration date 5. Choose Save Tip: Setup Workflows to alert appropriate associates that are involved in the Certification Process	To track company assets: 1. Open employee record 2. Click add a new in the blue action bar 3. Select asset type 4. Complete related fields 5. Input assets description 6. Choose Save Tip: provide access to your IT staff to track hardware issued to employee Termination process includes termination report which includes company assets tracking.	To track disciplinary actions: 1. Open employee record 2. Click add a new in the blue action bar 3. Select offense date 4. Type of offense 5. Actions taken 6. Offense description 7. Choose Save Tip: provide access to your managers to track disciplinary actions on their employees
Messages	**Training / Skills / Awards***	**Prior Employment**	**Employee Contacts**
Go to > Client Management > HR Management > Employee Categories / Messages	Go to > Employee Management > Human Resources> Training, Skills, or Awards	Go to > Employee Management > Human Resources>Prior Employment	Go to > Employee Management > Human Resources>Employee Contacts
To create a Message category: 1. Select Add New 2. Enter Category Name and Description To create an Employee Message: 1. Select Add New 2. Enter Message Title 3. Enter Message Text 4. Enter Effective Date 5. Choose Message Category 6. Select Show On options 7. Choose Save 8. Add Links and Attachments Tip: You can now upload PDF (Fillable Forms to iSolved and attach to messages via the Forms tab.	To track employee training: 1. Open employee record 2. Click Add New in blue action bar 3. Enter title of Training class 4. Complete related training fields To track employee skills: 5. Open employee record 6. Click Add New in blue action bar 7. Enter title of Skill 8. Complete related skill fields To track employee awards: 1. Open employee record 2. Click Add New in blue action bar 3. Select the Award type 4. Complete related skill fields 5. Choose Save	To track prior employment: 1. Open employee record 2. Click Add New in blue action bar 3. Enter Employer name 4. Enter Job Title 5. Enter Start Date 6. Complete related fields 7. Choose Save	To track employee contacts: 1. Open employee record 2. Click Add New in blue action bar 3. Select Relationship 4. Select Emergency Contact, Dependent, Beneficiary 5. Complete Dependent Information a. General (Name) b. Personal (SSN / Birth Date) c. Contact (Phone/Email) d. Address 6. Choose Save Tip: Provide access to managers to access Emergency Contacts

***Updating drop-down table values can be accessed under Client Management > HR Management (and the specific category)**