HR MANAGEMENT IN ISOLVED
SPECIAL COVID-19 EDITION

Welcome…

We will begin shortly.

Some Housekeeping Items:

- All participants have been placed on mute
- All registrants will receive a follow up email with a link to the recorded webinar and any training documentation
- Stay updated and register for upcoming webinars on our COVID-19 INFO Center here: https://ctrhcm.com/home/covid-19-information-center/
- This training is intended for educational and informational purpose. We hope that you learn a lot, but the information should not be construed as legal or tax advice.
- If you have any questions or want to request training, please email training@ctrhcm.com

Presenter: Kara Stivason, CTR Trainer

CTR™

Thank you for joining us our

iSolved Did You Know Monthly Webinar Series HR Management: SPECIAL COVID-19 Edition!

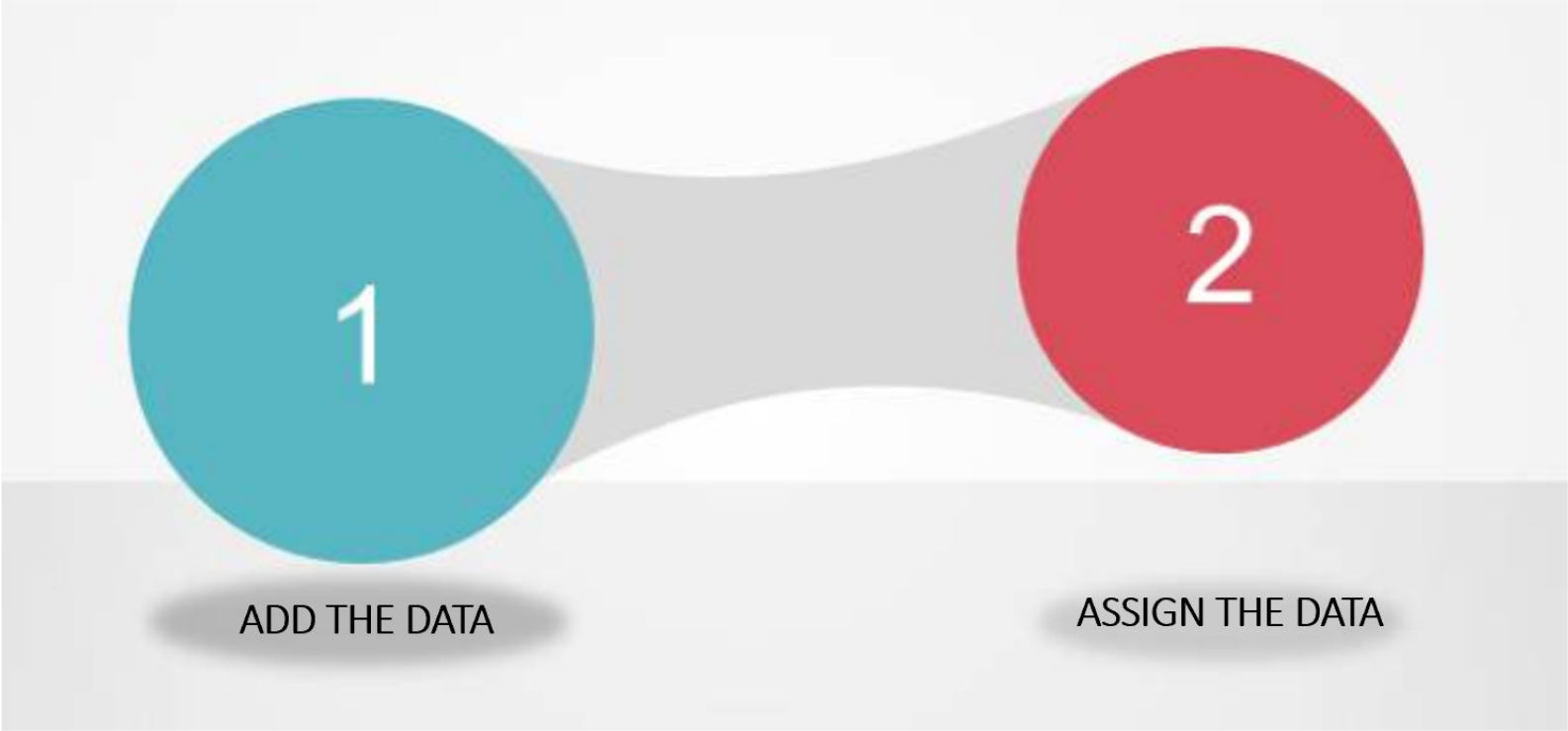
Today, we will review:

- HR Management Tools in iSolved
- How to Use these Tools to Manage Covid-19
- Sample COVID-19 Related Forms

ARE YOU TRACKING?

- Employee Contacts
- Prior Employment
- Awards
- Certifications
- Education
- Skills
- Training
- Disciplinary Actions
- Company Assets
- Employee Documents

TWO STEPS!



CLIENT MANAGEMENT > HR MANAGEMENT

EMPLOYEE MGMT > HUMAN RESOURCES

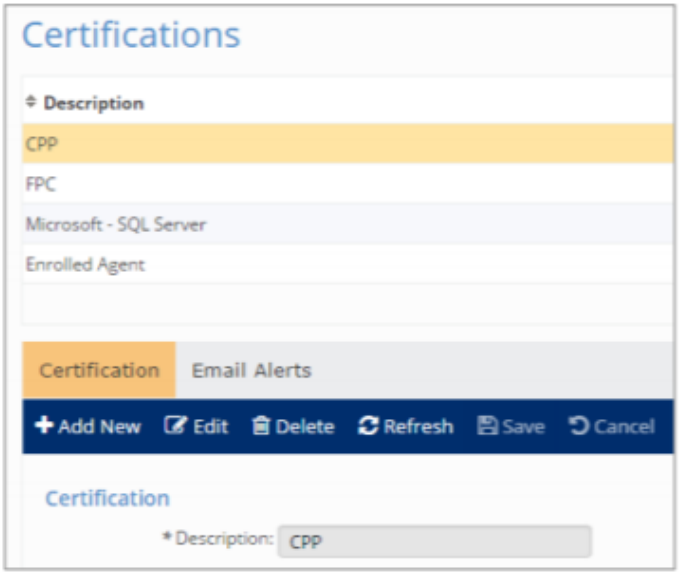
CERTIFICATIONS

→ What types of certifications do you your employees hold?

→ When should they be re-certified?

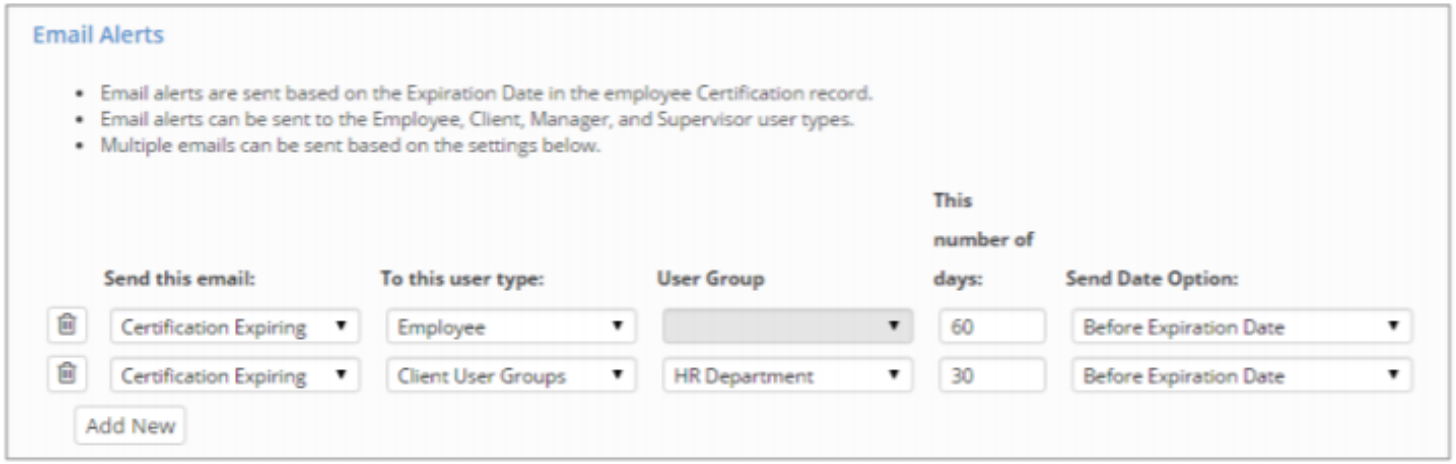
Add each of the certifications that an employee may earn-this list will then become the drop-down menu for assigning certifications.

Client Management > Human Resources > Certifications



1. Click the **ADD NEW** icon.
2. Enter the name of the **Certification**.
3. Click the **SAVE** icon.

E-MAIL ALERTS



Employers, Managers or Admin Users may be notified by e-mail when the employee's certification is ready to expire or has recently expired. Select the E-mail Alerts tab.

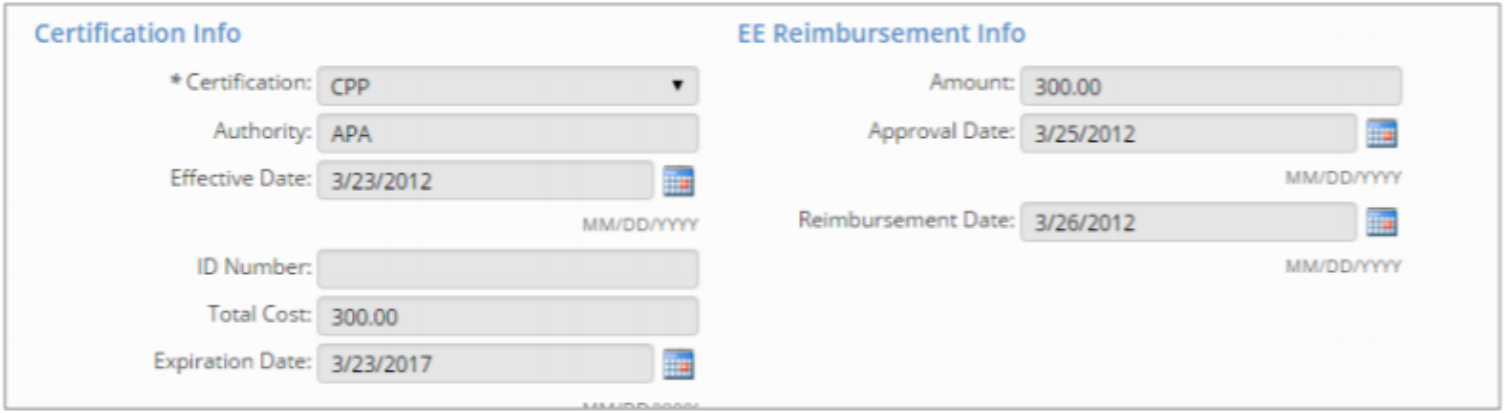
→ You are not required to use the e-mail alerts feature

→ Certification e-mail alerts are generated daily at 5pm EST.

→ The expiration date on the employee's certification screen determines when alerts are generated.

→ E-mail templates need to be created for the alerts under Workflow Setup > Email Templates.

EMPLOYEE CERTIFICATIONS



Employee Management > Human Resources > Certifications

- Click on the **Add New** icon.
- Select the **Certification** from the drop-down (required).
- Add an **Authority** (optional).
- Enter the **Effective Date** (optional).
- Enter the **Expiration Date** (required if you are using the e-mail alert).
- Enter an **ID Number** and **Total Cost** (optional).
- Add **Employee Reimbursement Info**, if desired.
- Click on the **Save** icon.

CERTIFICATION HISTORY

Certification

Certification	Effective Date	Expiration Date
CPP	3/23/2012	3/23/2017
Enrolled Agent	11/1/2016	

Want to see Certification History?

Just look at the top of the screen!

History of all certifications will be maintained for the employee will be maintained at the top of the screen.

LET CERTIFICATION TRACKING HELP YOU!

While you're focusing on keeping updated on the latest info regarding COVID-19, let the iSolved Certification Tracking be one less thing on your plate to worry about!

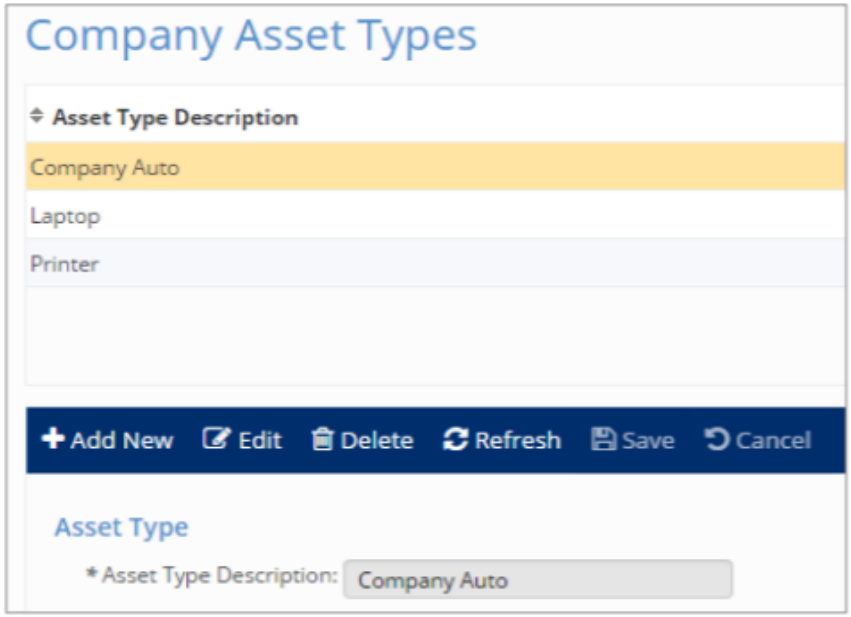
The workflow attached will allow you to have your managers, employees take ownership of renewing any required certification.

If you currently track the certifications in a spreadsheet, we can import these for you so you don't have to manually enter the information!

AWARDS, EDUCATION, SKILLS, DISCIPLINARY ACTIONS, AND COMPANY ASSETS

What type of awards, education, skills disciplinary actions or assets do you need to track for your employees?

This list will then become a drop-down menu that you can select for each employee. You can add to this list at any time. Let's take a look at an example:

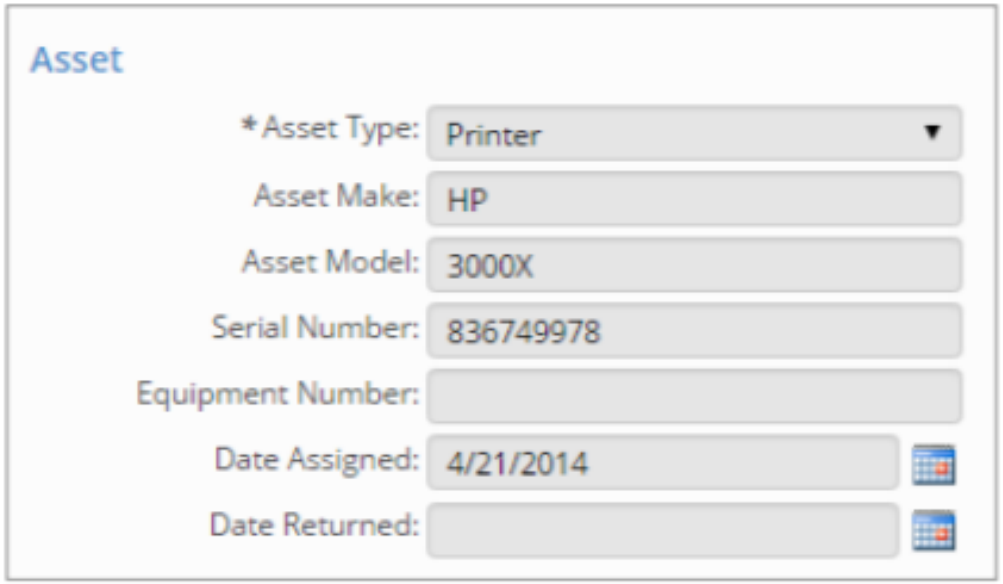


- Click on the **Add New** icon.
- Enter the description for the appropriate HR category.
- Click on the **Save** icon.

ADDING AT THE EMPLOYEE LEVEL

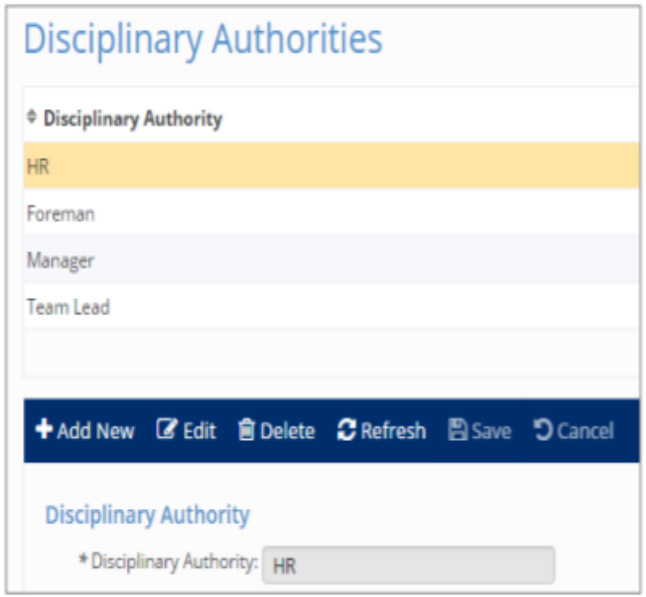
Navigate to Employee Management > Human Resources

- Click on any of the HR screens
- Click the **Add New** icon



DISCIPLINARY AUTHORITIES

- A Disciplinary Authority is a role within your company with the ability to enforce the rules of the organization (i.e., Manager). Disciplinary authorities need to be set up prior to setting up the Disciplinary Offenses.



- Click on the **Add New** icon.
- Enter the **Disciplinary Authority.**
- Click on **Save**.

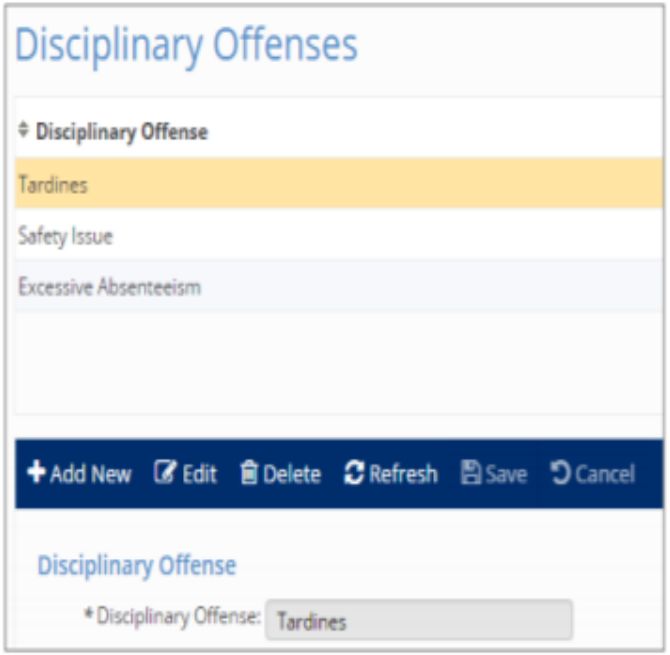
DISCIPLINARY ACTIONS

- A Disciplinary Action is a list of the wrongdoings in your organization, either based on company policy or industry standard. You are able to create a list of all the actions in order to track these events per employee.

- Click on the **Add New** icon.
- Enter title of a **Disciplinary Offense**.
- Click on **Save**.

DISCIPLINARY ACTIONS

- Do you track disciplinary actions like tardiness?
- You can create a list of all the actions in order to track these events per employee.



- Click on the **Add New** icon.
- Enter title of a **Disciplinary Offense**.
- Click on **Save**.

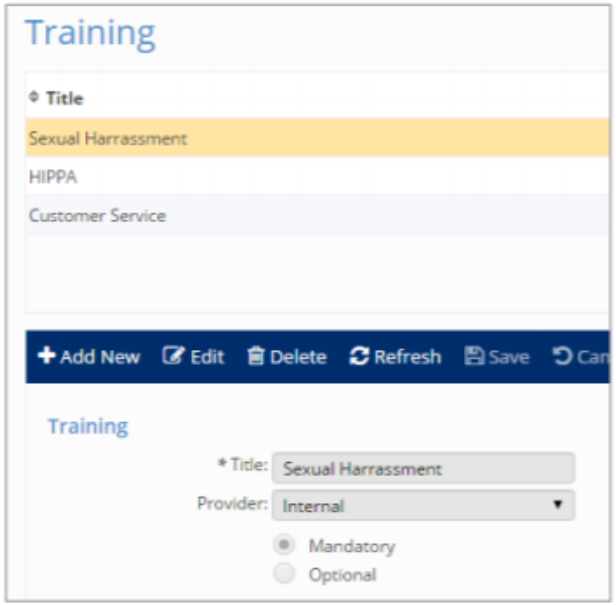
HOW ASSETS & DISCIPLINARY ACTIONS CAN HELP YOU NOW MORE THAN EVER!

If your employees are working remotely, it's important they have the necessary tools to do their job and now is the time to make sure you are tracking those assets!

While we are faced with times of uncertainty, we want to make sure we are still conducting business as usual and part of that is necessary employee feedback and tracking disciplinary actions.

TRAINING

- Do you track training?
  - Mandated training requirements?
  - Promotion decisions?
  - Costs associated with training including actual cost of time away from work?



- Click on the **Add New** icon.
- Add a training class **Title**.
- Select **Provider** – Internal or External.
- Select if the class is **Mandatory** or **Optional**.
- Add **Description** (optional).
- Click on **Save**.

HOW TRACKING TRAINING CAN HELP

Because of the necessary precautions in place and social distancing, most training is being held remotely which means it can be harder than ever to track.

Are you keeping your employees informed with the proper steps to take like hand-washing, etc.? If you're doing your part to keep your employees informed, be sure to document this and track your training.

Additionally, some of your staff may not be as busy as others because of their role-take advantage of this extra time and have them complete training and education!

Most of us know the importance of training and empowering your employees but tracking that training can be equally important and beneficial!

EMPLOYEE CONTACTS:
EMERGENCY CONTACTS & DEPENDENTS/BENEFICIARIES

Now-more important than ever, maintaining a list of Employee Contacts is crucial!

The Employee Contacts serve 2 functions:

Emergency Contacts- The first function is providing online access to the employee's emergency contact information. Encourage employees to keep this information current at all times.

Dependents & Beneficiaries- The second function is essential for benefits and COBRA administration. These screens list all dependent and beneficiaries to be sure that they are properly covered by the benefits selected and receive mandated COBRA notices when changes occur.

EMERGENCY CONTACTS

Emergency Contacts

iSolved University

Contact Person	Relationship Code	Home	Mobile	Work	Call Order
Jason Smith	Grandparent				
Joe Smith	Brother	724-772-7777			
Rachel Stephany	Child	412-749-2592	412-555-1212		
Nancy Able	Spouse				1

Add New | Edit | Remove | Refresh | Save | Cancel

Contact Type

* Relationship: Grandparent

Other Information

Hide Contact in ESS

Deceased

General Information

* First Name: Jason

Middle Name:

* Last Name: Smith

Prefix:

Suffix:

Contact Information

Call Order:

Home:

Mobile:

Work:

Email Address:

DEPENDENTS

Dependents

iSolved | University

Contact Person	Relationship Code	Full-time Student	Disabled
Rachel Smith	Child	No	No

Add New | Edit | Remove | Refresh | Save | Cancel

Contact Type

* Relationship: Child

Other Information

- [ ] Hide Contact in ESS
- [ ] Deceased

Dependent Information

- [ ] Full-time Student
- [ ] Disabled

General Information

* First Name: Rachel
Middle Name:
* Last Name: Smith
Prefix:
Suffix:

Personal

SSN:
Update SSN:
Birth Date: 2/15/2009
* Update Birth Date:
Gender: Female

Contact Information

Call Order:
Home: 412-749-2592
Mobile: 412-555-1212
Work:
Email Address:

Address

- [x] Use Employee Address

Street: 1043 Glenfield Road
Zip Code: 15202
City: BELLEVUE
State: Pennsylvania

BENEFICIARIES

Beneficiaries

iSolved University

Contact Person	Relationship Code
Nancy Able	Spouse

+ Add New Edit Remove Refresh Save Cancel

Contact Type

* Relationship: Spouse

Other Information

Hide Contact in ESS

Deceased

General Information

* First Name: Nancy
Middle Name:
* Last Name: Able
Prefix:
Suffix:

Personal

SSN: 123-45-6789
Update SSN:
Birth Date: 1/1/1980
Update Birth Date:
Gender: Female

Contact Information

Call Order: 1
Home:
Mobile:
Work:
Email Address:

Address

Use Employee Address
Street: 1043 Glenfield Road
Zip Code: 15202
City: BELLEVUE
State: Pennsylvania

HOW EMPLOYEE CONTACTS CAN HELP

I think this one goes without saying-it is crucial to make sure employee contacts are up to date. Now, that we're faced with this pandemic, it raises that a level!

Utilizing employee contacts in self-service allows you to put the ownership on the employee to keep this information accurate.

If you haven't done this in a while or ask your employees to update during a certain time, now may be the time to open this function up to your employees!

EMPLOYEE DOCUMENTS

Document, Document, Document!

How does your company store important employee documents?

The Employee Documents screen provides the ability to store HR and Payroll related documents online that were previously held in a filing cabinet.

Storing documents online can allow the employees, managers, and admin users access to documents while maintaining the appropriate level of security. Online documentation storage is acceptable for labor or tax audits.

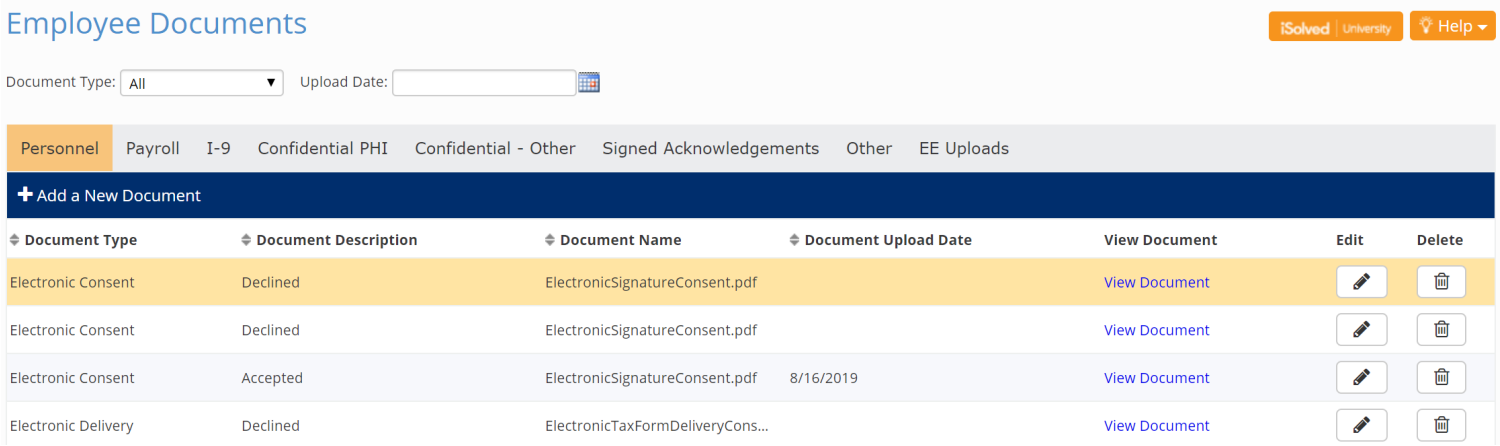
EMPLOYEE DOCUMENTS

Add each important document in the Employee Document area and the system will keep a record as well as a copy of the document for as long as you may need it.

You may add or delete documents from this list at any time.

Employee Management > Human Resources > Employee Documents to upload a document.

You can also give your employees the ability to upload documents!



DOCUMENTATION for the FFRCA Leave

An Eligible Employer will substantiate eligibility for the sick leave or family leave credits if the employer receives a written request for such leave from the employee in which the employee provides:

1.The employee's name;

2.The date or dates for which leave is requested;

3. A statement of the COVID-19 related reason the employee is requesting leave and written support for such reason; and

4. A statement that the employee is unable to work, including by means of telework, for such reason.

The Request for COVID Sick/FMLA Leave Forms can be found on here!

MANAGING EMPLOYEE COMMUNICATION in iSOLVED

We recently did a webinar to show you how you could manage employee communication in iSolved. You can do this through Employee Messages and the Mass E-mail Utility Tool.

A highlight of doing an Employee Message is attaching documentation(pdf file) that requires an electronic acknowledgement. You can also add e-mail notifications and then report from this.

To view this recorded webinar or see the presentation, please visit our COVID-19 page here.

HELPFUL POLICIES & TEMPLATES

You will find a list of sample letters, forms & policies on our COVID-19 Info Center.

Let's talk about these resources and how they can help…

EMPLOYERS GUIDE TO WARN

Many employers are facing uncertainty and considering business contingency measures. To the extent layoffs, reductions of hours and closures are under consideration, employers need to be ready to navigate their obligations under the intricate requirements of the federal Worker Adjustment and Retraining Notification ("WARN") Act and its state analogues.

•The federal WARN Act requires covered employers to provide 60 days' advanced notice before terminating or laying off employees in connection with a plant closing or mass layoff. However, there are three exceptions to the 60 days' notice requirement and two of these exceptions—for unforeseeable business circumstances and for faltering businesses—are likely to apply during the crisis that is unfolding from COVID-19.

Be sure to review the WARN Act guide to stay compliant!

LAYOFF & FURLOUGH NOTICE

To help you stay compliant, we have the following documents ready for you to use:

- Layoff Notice
- Temporary Layoff Notice
- Furlough Notice
- Return to Work after Layoff Notice

ESSENTIAL BUSINESS LETTER

Due to various federal/state legislation, it maybe difficult for your employees to understand if you are an essential business. We have added the "Essential Business Letter" as a resource for showing employees that they work for an essential business.

ESSENTIAL BUSINESS LETTER (COVID-19)

[Disclaimer: Businesses should consult the relevant guidelines to determine whether they are an essential business.]

[date]

[employee name and address]

To whom it may concern:

The employee identified above is employed by **[name of business]**, which **[describe services your business provides]** and is continuing operations at **[address of business]** during the shelter-in-place order as an essential business under relevant law.

[Company name] is committed to complying with the relevant requirements and appreciates your assistance in enabling our employee to continue to provide essential functions to the community. This employee generally works a schedule of **[X to X]** and this letter does not apply to time outside of normal working hours. If you have any questions, please contact me at the number below.

Sincerely,

_____

[Name of executive]
[Phone number]

REMOTE WORK DOCUMENTS

The key is to create a Work From Home Policy that sets the right expectations and creates channels and infrastructure that not only supports working from home, but that mitigate the many pitfalls that spring up when you take employees out of the office.

To help with this, we have the following available:

- Work from Home Agreement
- Sample Work from Home Policy
- Acknowledgement of Receipt of Company Property & Financial Obligation Form

OTHER HELPFUL FORMS/POLICIES

We are constantly updating our COVID-19 Info Center with more letters, forms and policies so be sure to check it out daily. If you are in need of a sample letter or form, please submit that via the website or send an e-mail to training@ctrhcm.com and work to provide that for you! .

Sample Letters, Forms & Policies

Below are a list of various document templates to help you communicate any pertinent information to your employees:

- **Employers Guide to WARN**
- **Notice of Furlough (COVID-19)**
- **Notice of Layoff**
- **Notice of Temporary Layoff**
- **Essential Business Letter for Employees**
- **Work from Home Agreement**
- **Acknowledgement of Receipt of Company Property & Financial Obligation Form**
- **Notice of Reduced Earnings**
- **Sample Work from Home Policy**
- **FFCRA – FMLA Child Leave**
- **FFCRA – Emergency Sick Leave**

UPCOMING WEBINARS

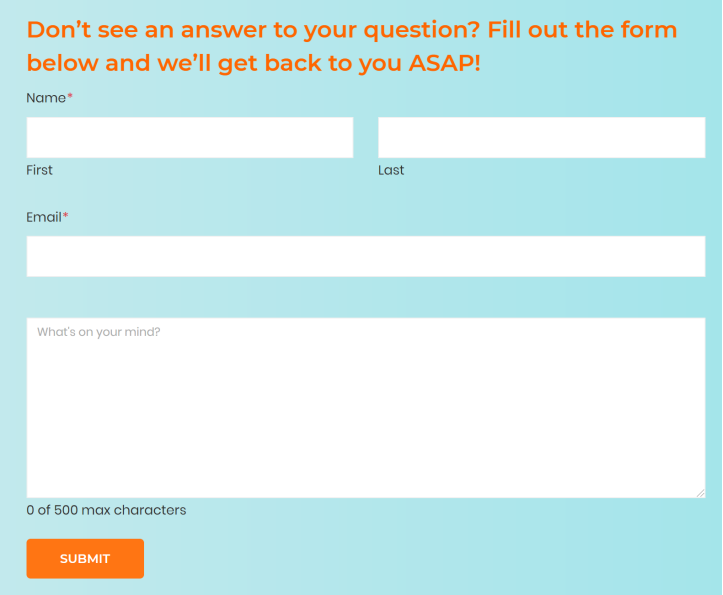
CARES ACT TAX CREDIT PLAYBOOK
Thursday, April 16: 10am-11am
Join us for a webinar covering the additional tax credits and tax deferral options under the Cares ACT. We will review:
- The Employee Retention Tax Credit
- Payroll Tax Deferral Options under the Cares Act
- How these options compare to the popular PPP Loan
- Which option may be best for your organization?

Managing a Remote Workforce, Handbooks & Other Tips to Help Manage Your Employees through a Pandemic
Friday, April 17: 10am-11am
Join us as we discuss how to manage a remote workforce and other tips on how to manage employees through a pandemic. In addition to discussing managing a remote workforce, we will review:
- The Importance of Updated Handbooks & Policies
- Maintaining Employee Communication
- Employee Wellness & Staying Unified

Register HERE!

MORE COVID-19 QUESTIONS?

Reach out to your CTR Support Representative or submit your question on our COVID-19 INFO PAGE to receive the answer to your most-pressing questions.



CTR™

From all of us at CTR:

Stay SAFE from COVID-19

Stay SMART and INFORMED

Stay KIND and support one another