

Training Guide

The screenshot displays the EBC HR Admin interface. The top navigation bar includes the EBC logo, 'HR Admin', and 'Quick Links'. The main content area is divided into several sections:

- Dashboard:** Features a 'Fiscal Celebration' announcement for 10/1/2020, stating that the end of fiscal year celebration will begin at 5:01 P.M. on Friday, October 30th in the main conference room. It also includes a 'Travel Notice' for 4/9/2020 regarding the CDC Travel Advisory for the United States as of 4/1/2020.
- Birthdays:** A table listing birthdays for December 1st through January 10th. Employees listed include Clooney, George (16), Martin, Susan (34), Colson, David (33), and Dopler, Skip (23).
- Certificate Expirations:** A section indicating no certificates are expiring in upcoming months.
- License Expirations:** A table showing license expiration dates, employee names, and types. For example, on 01/03/2021, Anderson, Roger (30) has a DOT license.
- Scheduled Reviews:** A section indicating no reviews are scheduled in upcoming months.
- Time Off Requests (Pending):** A section indicating no pending time off requests.
- Employee Anniversaries:** A table listing employee anniversaries. For example, on December 04, Roberts, Julia (9) has an anniversary.

The left sidebar contains a search bar and a list of menu items organized into categories: Company, Company Structure, Reporting, Audit, Time Clock, Applicant Tracking, Onboarding, Benefits, Communication, Tools, Company Setup, Employee Actions, Employee Maintenance, and Quick Links.

Advanced HR Training Guide

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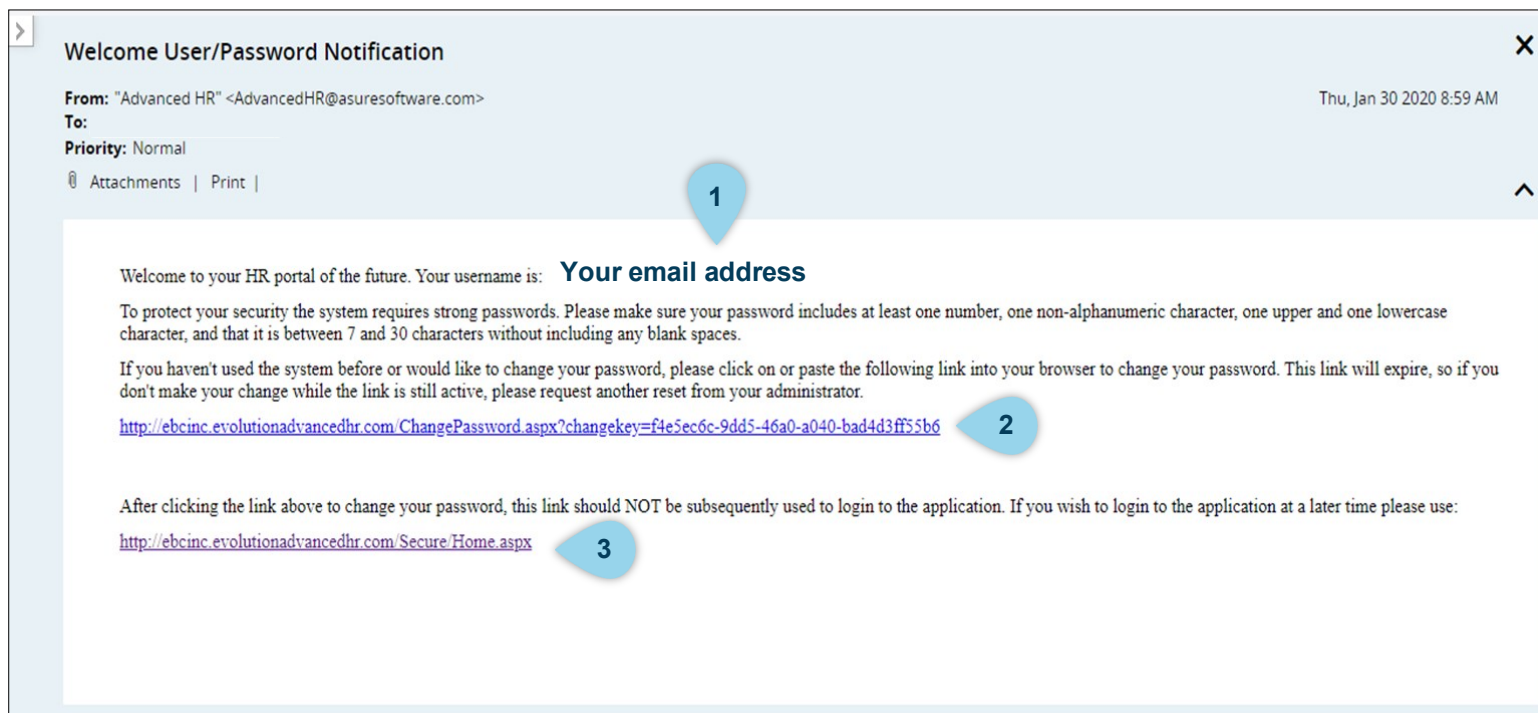
Initial Setup

This section includes information for setting up a new user on Advanced HR.

Welcome Email

Every new user will receive a welcome email. This email includes:

1. The employee's username.
2. A link to create a password for first time users.
3. A link to log in after the initial setup is complete.



Password Setup

Once you click the change password link found in the welcome email, a webpage will open with the Change Password Process page below.


1. Enter the email address as shown in the welcome email as the username.
2. Set up a password and re-key to confirm.
3. Click the CHANGE PASSWORD button to submit.

Change Password Process

1

STEP 1 - Enter your username/email

In addition to the secure link and unique code provided to you, we will also validate your username in this process.

 username



Username is required

2



STEP 2 - Enter NEW password

Enter the new password you would like set for your account. You will be asked to enter it twice to verify the accuracy.

Password ⓘ *

 password 


Re-enter Password

 re-enter password 

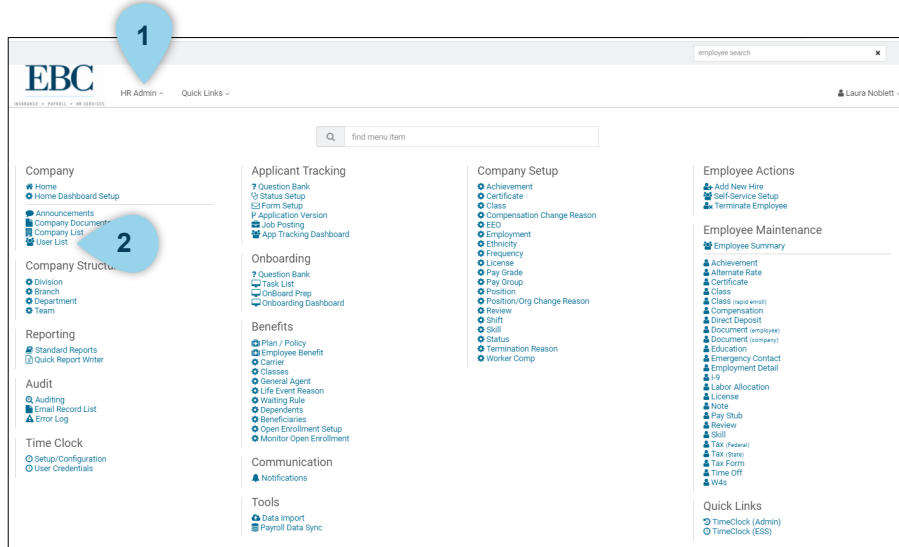
3

STEP 3 - Confirm and Click

Complete password change process by confirming your information and clicking below.

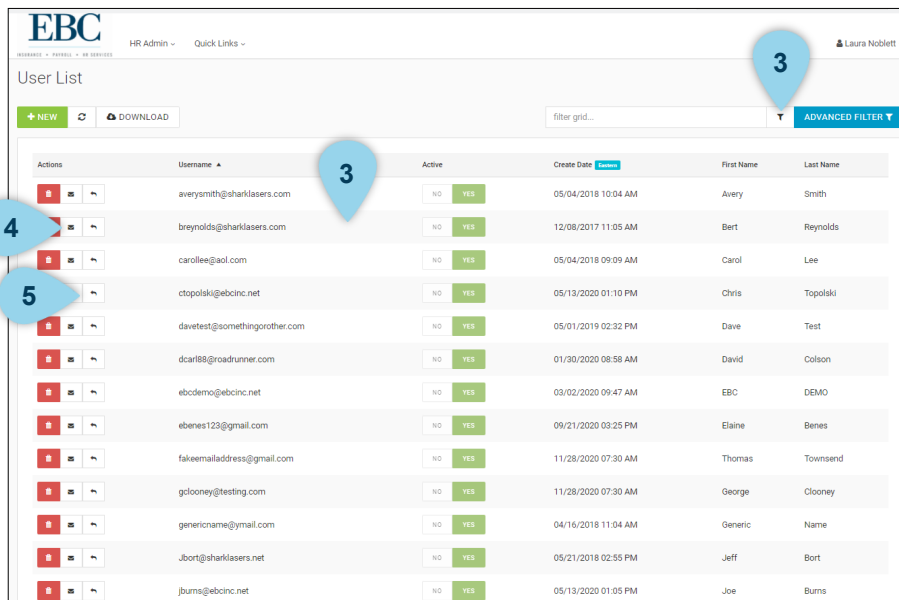
 CHANGE PASSWORD

Password Reset



Before resetting a password, you need to know if the employee received the Welcome Email and went through the process of setting up their initial password. If the answer to that is no, resend the Welcome Email. If the answer is yes, then send a Password Reset email:

1. Go to HR Admin screen.
2. Under Company, click on User List.



3. Scroll through the employee list or enter the employee name or email address in the Filter Grid window.
4. Click the middle icon to send a new Welcome Email to the employee.
5. Click the back arrow icon to send a Password Reset email to the employee.

Basic Navigation

This section reviews the Advanced HR Dashboard and some of the basic components within.

Dashboard Overview

Each time you log into Advanced HR, you will be directed to the Dashboard. The dashboard includes the following:

1. Company announcements.
2. Upcoming birthdays.
3. Certificate and licenses that are soon to expire.
4. Scheduling and time off review.
5. Upcoming employee anniversaries.

The screenshot shows the EBC HR Dashboard. At the top, there's a header with the EBC logo, navigation links for Insurance, Payroll, and HR Services, and a user profile for Laura Noblett. A search bar is also present. The main content area is divided into several sections:

- 1. Company Announcements:** Features a "Fiscal Celebration" announcement for 10/1/2020, stating that the end of fiscal year celebration will begin at 5:01 P.M. on Friday, October 30th in the main conference room. It also includes a "Travel Notice" dated 4/9/2020 regarding a CDC Travel Advisory for the United States, dated 4/1/2020, specifically mentioning "Coronavirus and Travel in the United States" and a "CDC Issues Domestic Travel Advisory for New York, New Jersey, and Connecticut".
- 2. Birthdays:** A table listing upcoming birthdays for December 1, 10, and 31, and January 10. Employees listed include Clooney, George (16), Martin, Susan (34), Colson, David (33), and Dopler, Skip (23). A "SHOW MORE" button is available.
- 3. Certificate Expirations:** A section stating "No Certificates expiring in upcoming months".
- 4. License Expirations:** A table showing license expirations for 01/03/2021 for Anderson, Roger (30) with a DOT license type.
- 5. Scheduled Reviews:** A section stating "No Reviews in upcoming months".
- Time Off Requests (Pending):** A section stating "No pending time off requests".
- Employee Anniversaries:** A table listing employee anniversaries for December 04 and December 26. Employees listed include Roberts, Julia (9) and Lake, Katie (14).

Numbered callouts 1 through 5 are placed over the corresponding sections in the dashboard screenshot.

Dashboard Overview

Click on HR Admin to display a full page of action items to complete your tasks.

The screenshot displays the EBC HR Admin dashboard. The top navigation bar includes the EBC logo, a search bar, and a user profile for Laura Noblett. The main content area is organized into several columns of links and dashboards. A red box highlights the 'HR Admin' link in the top navigation bar. The dashboard includes sections for Company (Home, Home Dashboard Setup, Announcements, Company Documents, Company List, User List), Company Structure (Division, Branch, Department, Team), Reporting (Standard Reports, Quick Report Writer), Audit (Auditing, Email Record List, Error Log), Time Clock (Setup/Configuration, User Credentials), Applicant Tracking (Question Bank, Status Setup, Form Setup, Application Version, Job Posting, App Tracking Dashboard), Onboarding (Question Bank, Task List, OnBoard Prep, Onboarding Dashboard), Benefits (Plan / Policy, Employee Benefit, Carrier, Classes, General Agent, Life Event Reason, Waiting Rule, Dependents, Beneficiaries, Open Enrollment Setup, Monitor Open Enrollment), Communication (Notifications), Tools (Data Import, Payroll Data Sync), Company Setup (Achievement, Certificate, Class, Compensation Change Reason, EEO, Employment, Ethnicity, Frequency, License, Pay Grade, Pay Group, Position, Position/Org Change Reason, Review, Shift, Skill, Status, Termination Reason, Worker Comp), Employee Actions (Add New Hire, Self-Service Setup, Terminate Employee), Employee Maintenance (Employee Summary, Achievement, Alternate Rate, Certificate, Class, Class (rapid enroll), Compensation, Direct Deposit, Document (employee), Document (company), Education, Emergency Contact, Employment Detail, I-9, Labor Allocation, License, Note, Pay Stub, Review, Skill, Tax (Federal), Tax (State), Tax Form, Time Off, W4s), and Quick Links (TimeClock (Admin), TimeClock (ESS)).

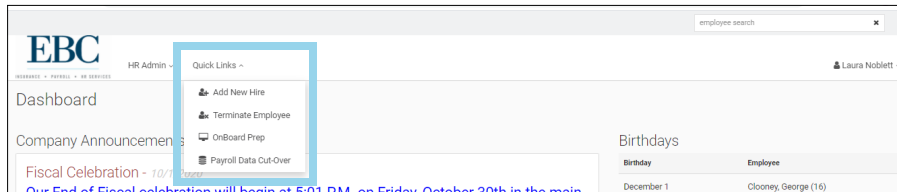
There is a red box around the 'HR Admin' link in the top navigation bar.

Below the dashboard, there is a section for 'Employee Announcements' with a table showing dates and employee names.

Date	Employee
December 04	Roberts, Julia (9)
December 26	Lake, Katie (14)

At the bottom of the page, there is a URL: <https://ebcinc.evolutionadvancedhr.com/Secure/Home.aspx#> and a note about COVID-19.

Dashboard Overview



Click on Quick Links to access the following components:

1

New Hire Process

STEP 1 - Type of Hire
The information below helps to guide you through the rest of the New Hire process.

Company*
Ebc Demo2 (EBC Demo2)

Tax Form (Type of Hire)*
W2 - Employee

Hire Date *
11/30/2020

Position +*
Please Choose (Represents BLANK)

Employee ID*
57

LET'S BEGIN NEW HIRE →

1. **Add New Hire:** Use this feature to manually add a new hire if not using Onboard Prep. Enter in all necessary new employee details, then click LET'S BEGIN ONBOARDING. Once complete, any additional information can be entered under Employee Maintenance (e.g. Direct Deposit).

2

Termination Process

STEP 1 - Employee Info
The information below helps to guide you through the rest of the Termination process. Remember, you can only terminate a current ACTIVE employee.

Company*
Ebc Demo2 (EBC Demo2)

Employee*
Please Choose (Represents BLANK)

Termination Date *
11/30/2020

LET'S BEGIN TERMINATION →

2. **Terminate Employee:** Select the employee then enter effective date, term reason, eligible for rehire, and comments as needed.

3

OnBoarding Prep Process

STEP 1 - Type of Hire
The information below helps to guide you through the rest of the OnBoarding process.

Company*
Ebc Demo2 (EBC Demo2)

Tax Form (Type of Hire)*
W2 - Employee

Hire Date *
11/30/2020

Position +*
Please Choose (Represents BLANK)

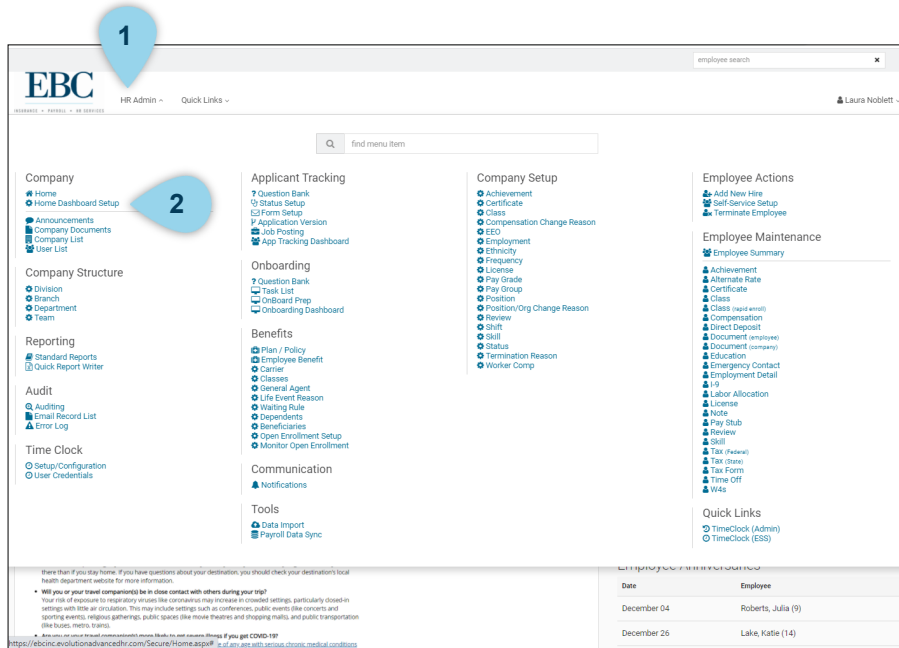
Employee ID*
57

Onboarding Task List*
Please Choose (Represents BLANK)

LET'S BEGIN ONBOARDING →

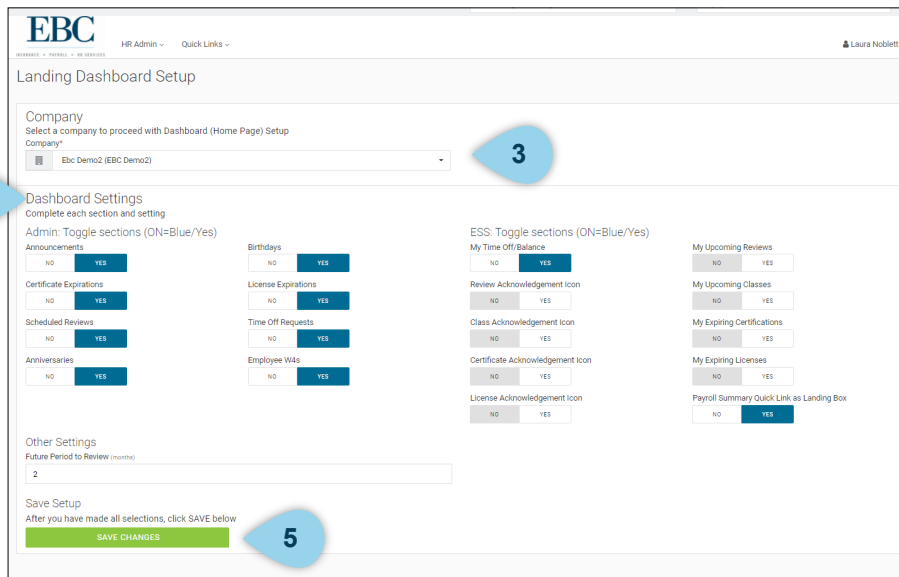
3. **Onboard Prep:** Use this feature to enter basic job details, such as position and hire date, and send an email link to the new employee to complete Onboard Task List details.

Setting Up Your View



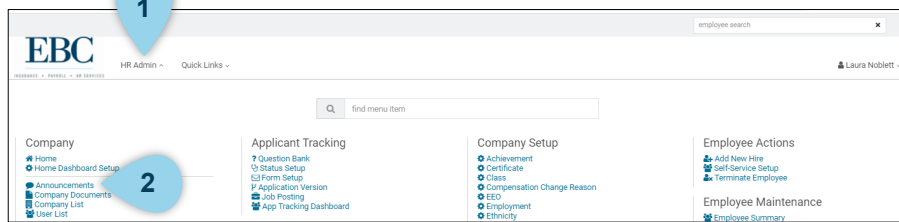
With Advanced HR, you can customize your Dashboard. To do this,

1. Click on HR Admin.
2. Under Company, click Home Dashboard Setup.



3. If you have access to more than one company, select the company before making any changes.
4. Under Dashboard Settings, switch the Admin Toggle options and ESS Toggle options to Yes if you want that option displayed or No if you do not want that option displayed on your Dashboard.
5. Press the SAVE CHANGES button to save your new setup.

Posting Announcements



Announcement: NEW RECORD

Company: Ebc Demo2 (EBC Demo2)

Status: Announcement On (selected) **NO YES**

High Priority: **NO YES**

Dates: Post Date: 11/27/2020 Expiration Date: [Calendar]

Announcement Posting: Title: [Text] Detail: [Rich Text Editor]

Images (only JPG, PNG, and GIF extension files allowed here): Browse or Drag/Drop images. Temporarily Uploaded Images: [Area]

Drag & drop files here ... **BROWSE...**

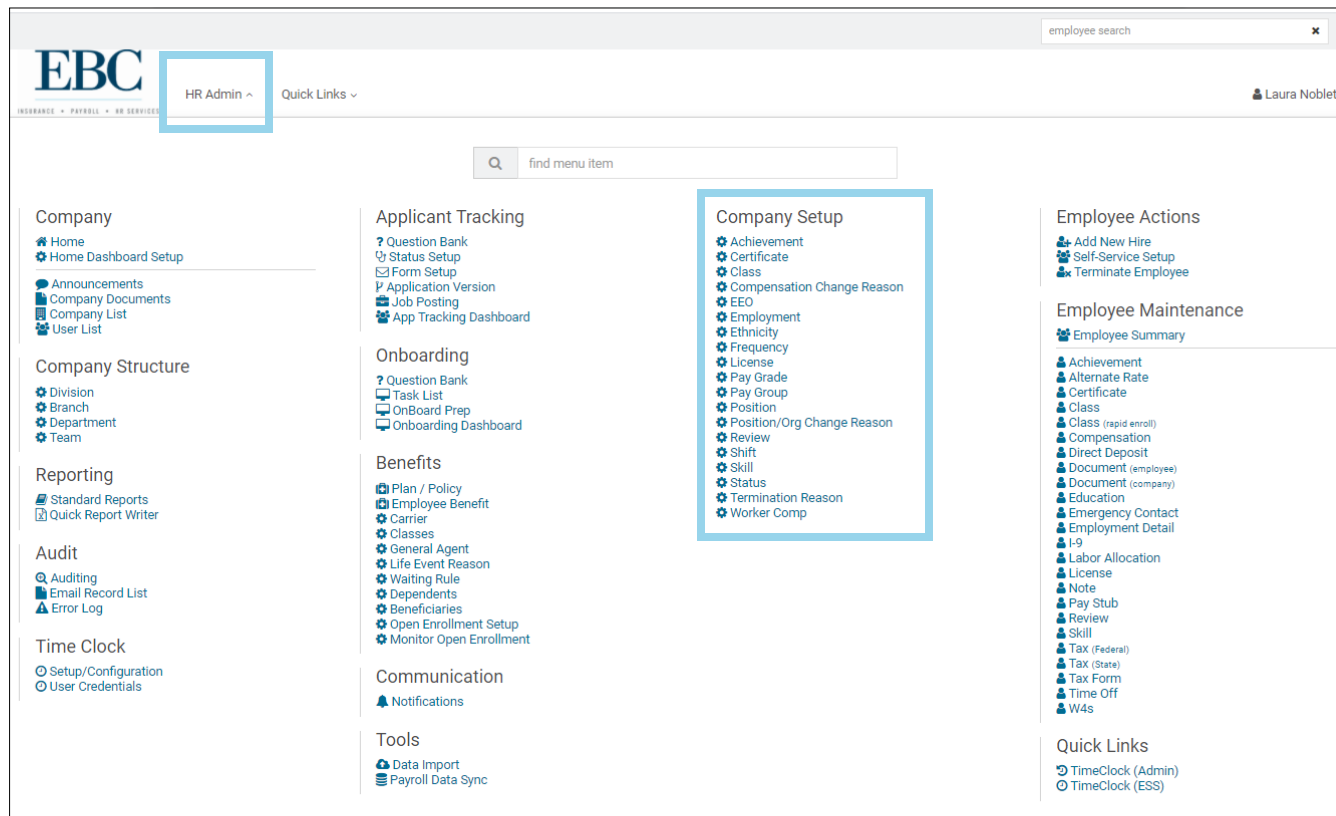
SAVE CHANGES SAVE & NEXT RECORD CLOSE

To post an announcement,

1. Click on HR Admin.
2. Under Company, click Announcements.
3. Click the trash icon to delete an announcement.
4. Toggle between Yes and No to turn the announcement on and off.
5. If you announcement is high priority, switch the toggle to YES to push the announcement to the top of the dashboard.
6. Click on the announcement to view and edit the details (i.e. text, delivery and expiration dates, images).
7. Click the NEW button to add a new announcement.
8. The new announcement page will display - this has the same layout as #6 above (view and edit existing announcement).
9. Enter title and the announcement details in the Announcement Posting section.
10. Select status.
11. Enter dates.
12. Enter an image or file.
13. Choose a button to save and close, save and view the next announcement, or close without saving. You can save reoccurring announcements to be used again. Saved announcements can be edited to change details within (e.g. open enrollment notice).

Company Setup

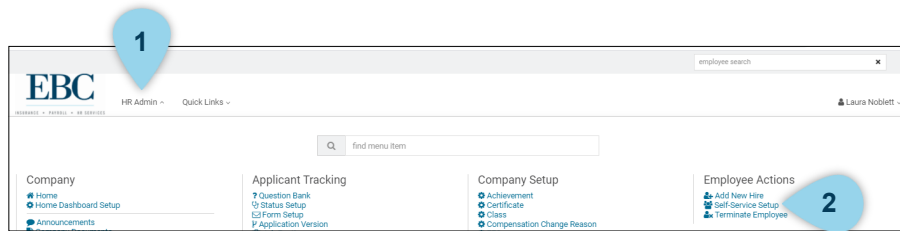
Company Setup offers features to track selected fields. This section can be accessed by clicking on HR Admin. Use it to view various tables for tracking details such as Certifications, Licenses, Performance Reviews, Skills, etc.



Employee Actions

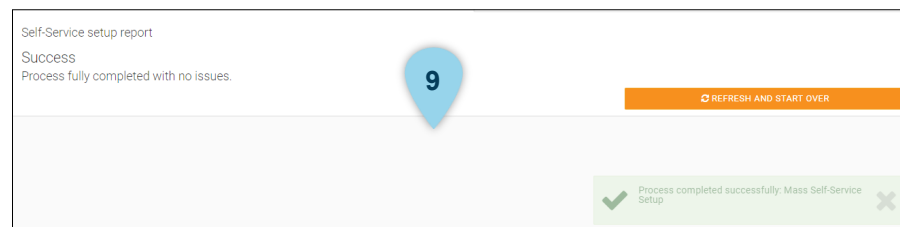
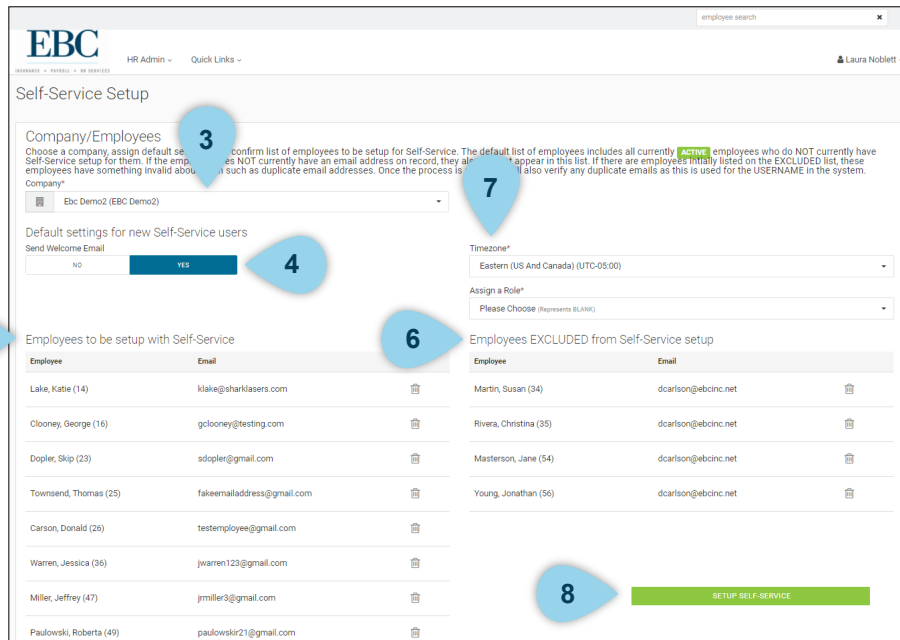
This section reviews how to set up employee self-service.

Self-Service Setup



To set up employee self-service,

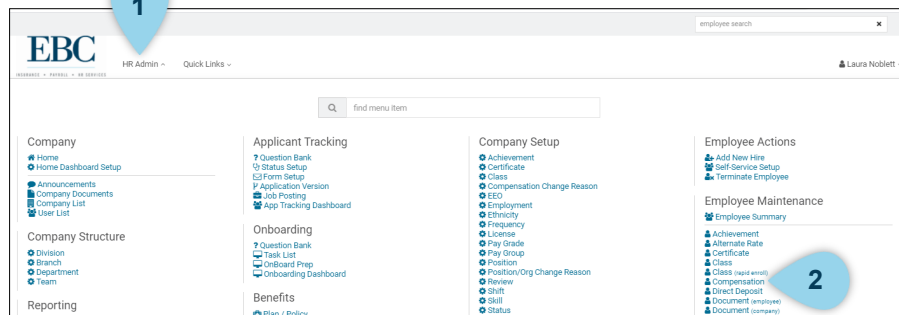
1. Click on HR Admin.
2. Under Employee Actions, click Self-Service Setup.
3. Choose a company from the drop down list.
4. Toggle Yes or No to assign default settings.
5. Confirm the list of employees to be setup for Self-Service. The default list of employees includes all currently **active** employees who do NOT currently have Self-Service setup for them. If the employee does NOT currently have an email address on record, they will not appear in this list.
6. If there are employees initially listed on the EXCLUDED list, these employees have something invalid about them such as duplicate email addresses. Once the process is started, it will also verify any duplicate emails as this is used for the USERNAME in the system.
7. Verify the time zone, then assign a role from the drop down options. It's critical to add instruction to assign Base User Role (ONLY) to regular employees. Base Admin will allow user to see all content including rates for all employees, and Base Manager will allow the same for any employees who have the user listed as a Supervisor in their record.
8. Click the SETUP SELF SERVICE button.
9. You will see a success message once the process is complete.



Employee Maintenance

This section reviews how to view and edit employee information.

Compensation



To review and employee compensation,

1. Click on HR Admin.
2. Under Employee Maintenance, click Compensation.
3. The list will automatically be filtered by Effective Date of recent changes.
4. Click on the trash can icon to delete a compensation change. This should only be done if the entire entry is incorrect. The HRIS tracks history of changes which should remain intact in almost all instances. If a rate needs to be fixed, the user can open the record and change it then add a reason and or notes as needed.
5. Click on a row to review or edit details of the compensation change.
6. Click the NEW button to add a new compensation change.
7. Choose an employee from the Employee drop down list.
8. Enter Compensation Info (effective date, pay type, and pay rate).
9. Update Other Info as needed.
10. Choose a save option.

Actions	Name	Employee ID	Effective Date	Pay Type	Pay Rate	Change Reason
	Benes, Elaine	22	10/30/2020	Salary	2,750.0000	Job Change
	Young, Jonathan	56	10/29/2020	Hourly	17.5600	
	Collins, Sheila	55	10/12/2020	Salary	1,450.0000	

Compensation: NEW RECORD

Employee
Company* Ebc Demo2 (EBC Demo2)

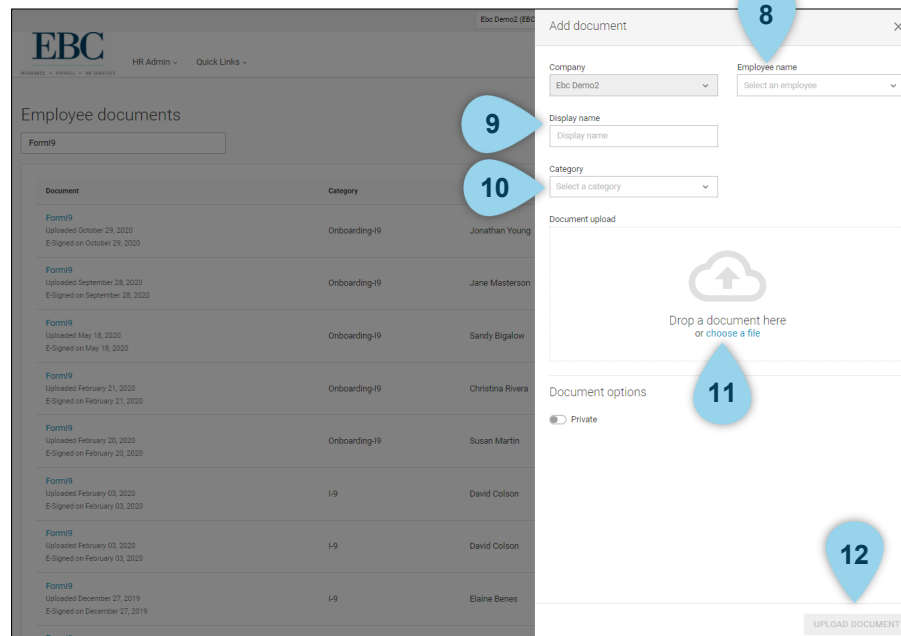
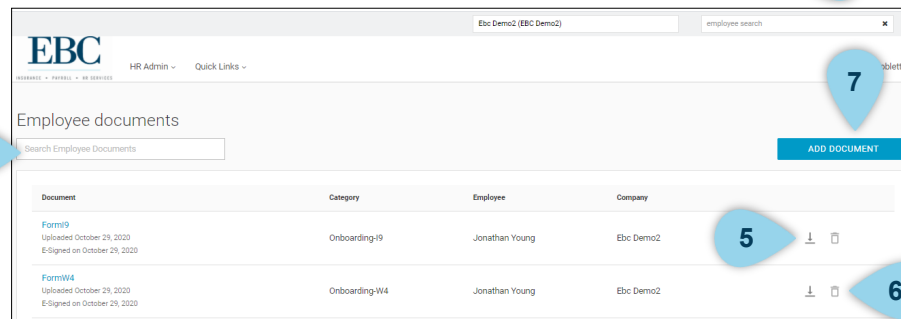
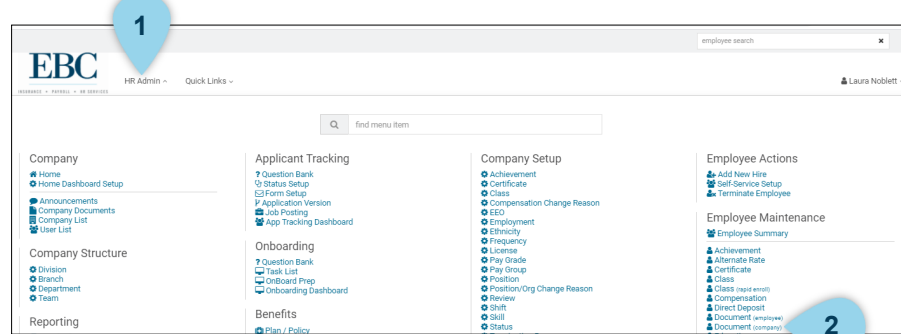
Employee* Please Choose (Represents BLANK)

Compensation Info
Effective Date *
Pay Type*
Rate (Hourly or Salary per pay period)*

Other Info
Change Reason* Please Choose (Represents BLANK)
Comment

SAVE CHANGES SAVE & NEXT RECORD CLOSE

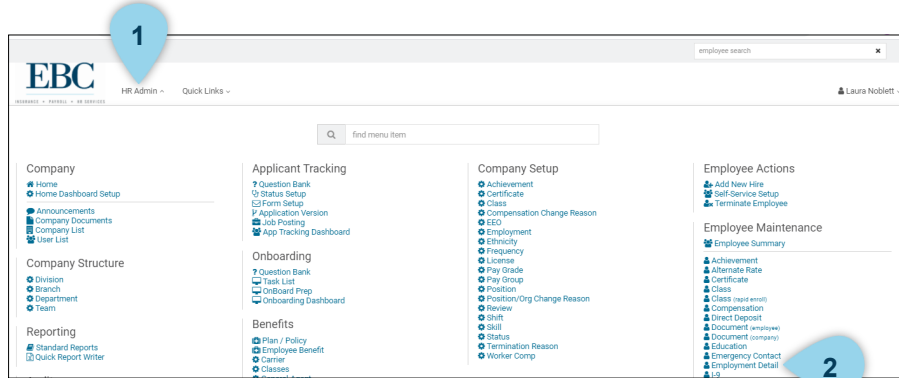
Employee Documents



To review and upload employee documents,

1. Click on HR Admin.
2. Under Employee Maintenance, click Document (employee).
3. Use the search box to locate a specific document. Type the document name to find all added documents of that type or search by employee name to find all documents added for a specific employee.
4. Click on the document title to open and view.
5. Click the download icon to download and save the document.
6. Click the trash can icon to delete a document.
7. Click the ADD DOCUMENT button to upload a new document for an employee.
8. Select an employee from the Employee Name drop down list.
9. Enter a Display name - this will appear as the document title in the Employee documents list.
10. Select a category from the drop down list.
11. Choose a document to upload.
12. Click the UPLOAD DOCUMENT button once you are done.

Employment Detail



The Employment Detail section houses job detail history for position, employment type, location, supervisor, etc. All employment and job changes must be completed through this feature. To access Employment Detail,

1. Click on HR Admin.
2. Under Employee Maintenance, click Employment Detail.
3. To start the termination process (also accessed through the Quick Links reviewed on page 11), click the GO TO TERMINATION button.
4. To add a Position/Organization record, choose a company and employee.
5. Chose the effective date.
6. If you wish to re-hire (or add any record) for an inactive employee, use the top employee search to find the inactive employee rather than the dropdown selection.
7. Click the button LET'S BEGIN ADDING A POSITION/ ORGANIZATION.

ADD Position/Organization

If you would like to add a Position/Organization record, please choose an effective date that you will be choosing. We will be copying information from that in mind when choosing an effective date. You cannot pick a date that is in the past. Also remember that it is NOT a good idea to have multiple records for the same employee on the same day. The system will only keep the first historical dated record for this employee. If you wish to re-hire (or add any record) for an inactive employee, please use the top employee search to find the inactive employee rather than the dropdown selection.

Company: Ebc Demo2 (EBC Demo2)

Employee: Please Choose (Represents BLANK)

Effective Date: 11/30/2020

Is this a RE-HIRE? NO YES

LET'S BEGIN ADDING A POSITION/ ORGANIZATION

New Hire/Termination

If you want to hire or terminate an employee, please go to the special processing pages that are setup to help you with those respective processes.

GO TO NEW HIRE **GO TO TERMINATION**

DOWNLOAD **filter grid...** **ADVANCED FILTER**

Actions	Name	Emp ID	Eff Date	Position	Organization Structure	Status	Reports To 1	Hire	Term
	Young, Jonathan	56	10/29/2020	Director	Division 2, Office	Active	Tripp, Star	NO YES	NO YES
	Collins, Sheila	55	10/27/2020	Manager	Division 2, Office	Active		NO YES	NO YES
	Collins, Sheila	55	10/12/2020	Manager	Division 2, Office	Active		NO YES	NO YES
	Masterson, Jane	54	10/05/2020	Communication Rep	Division 2, Office	Active	Smith, Susan	NO YES	NO YES
	Hetfield, Jim	52	07/13/2020	Driver	Division 2, Field	Active		NO YES	NO YES
	Anderson, Roger	30	07/02/2020	Manager	Division 2, Office	Active	Name, Generic	NO YES	NO YES

Employment Detail

Employment Detail: **NEW RECORD**

8 Employee

Company*
Ebc Demo2 (EBC Demo2)

Employee*
Reynolds, Bert (7)

Effective Date
Effective Date *
11/30/2020

9 Position/Org records for employee

Eff Date	Status	Position	Division	Branch	Department	Team	Hire	Term
04/02/2018	Active	Director	Division 2	Office			✓	
02/14/2018	Active	Manager	Division 2	Office				
01/01/2011	Active	Driver	Division 2	Office			✓	

10

Position/Status

Position*
04 - Director

Employment Type*
NA - N/A

Status*
Active - Active

Organization

Division*
200 - Division 2

Branch*
100 - Office

Compliance

EEO Category*
0 - 0 No EEO Class Assigned

Worker Comp Code*
Please Choose (Represents BLANK)

Reports To/Supervisor

Reports To 1
Smith, Susan (5)

Reports To 2
Please Choose (Represents BLANK)

Reports To 3
Please Choose (Represents BLANK)

Supervisor (SC)
Supervisor (SC)

Benefits

Benefit Class / Eligibility Group
Please Choose (Represents BLANK)

Hire/Term

Hire Record
NO YES

Termination Record
NO YES

Termination Reason
Please Choose (Represents BLANK)

Comment/Reason

Change Reason
Please Choose (Represents BLANK)

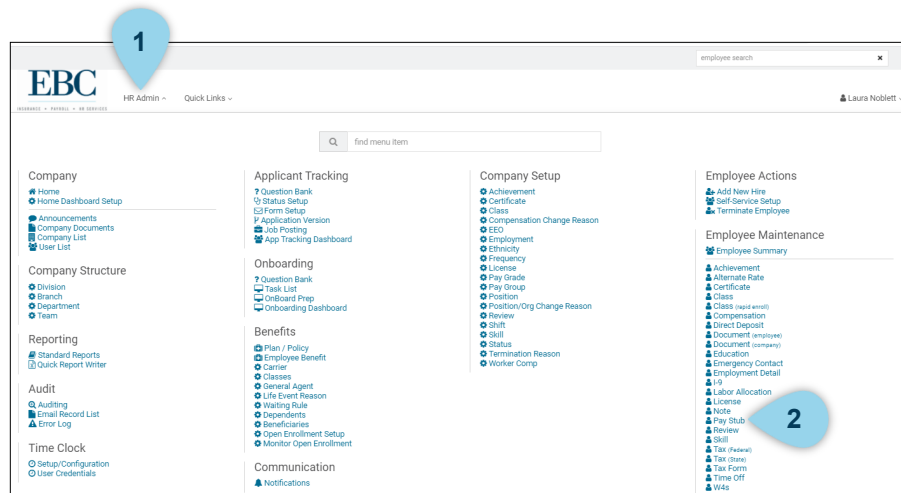
Comment
Comment

11

SAVE CHANGES **CLOSE**

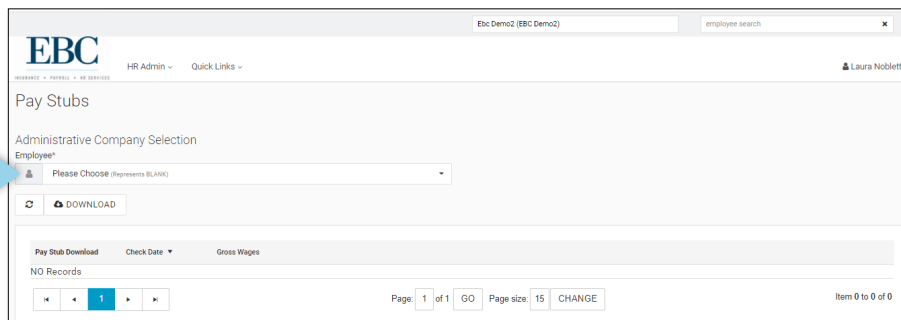
8. Information in the Employee and Effective Date sections are not able to be edited here. These selections need to be made on the previous screen.
9. Review previous positions for the employee in the Position/Org records for employee section.
10. Make selections for the remaining fields:
 - Position/Status
 - Organization
 - Compliance
 - Reports To/Supervisor
 - Benefits
11. Click the **SAVE CHANGES** button to save the position update.

Pay Stub

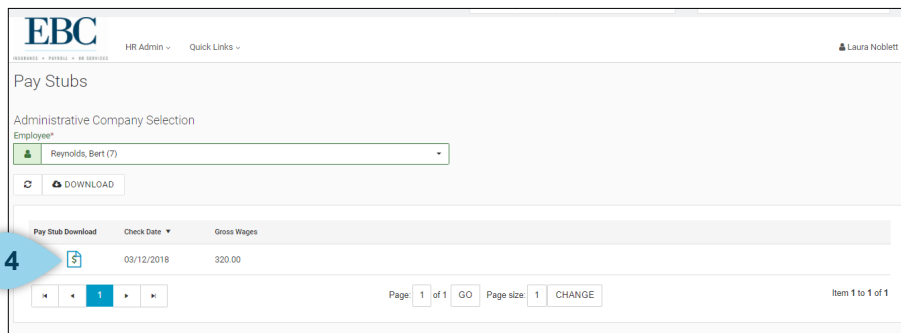


To review and download an employee pay stub,

1. Click on HR Admin.
2. Under Employee Maintenance, click Pay Stub.



3. Choose an employee from the Employee drop down list.

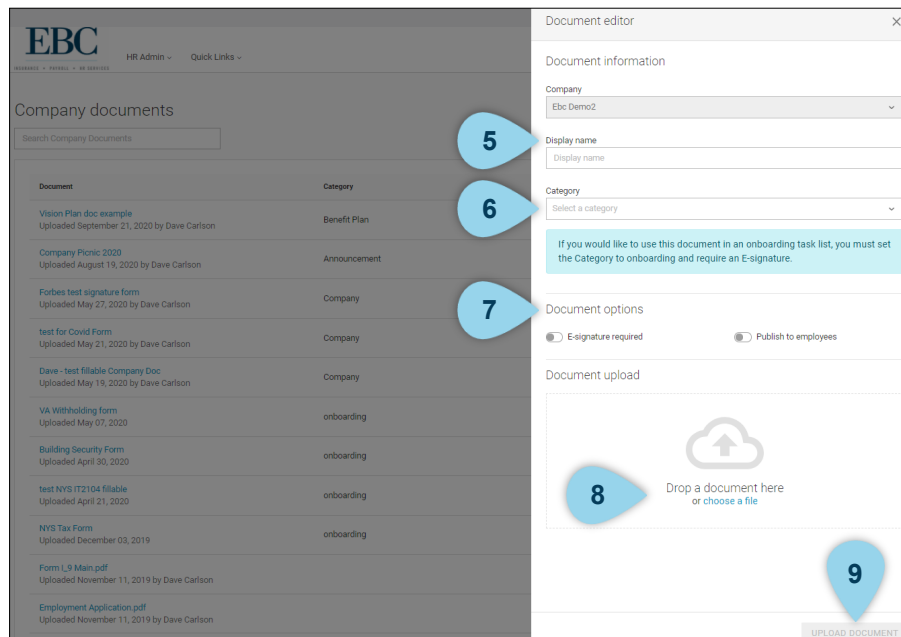
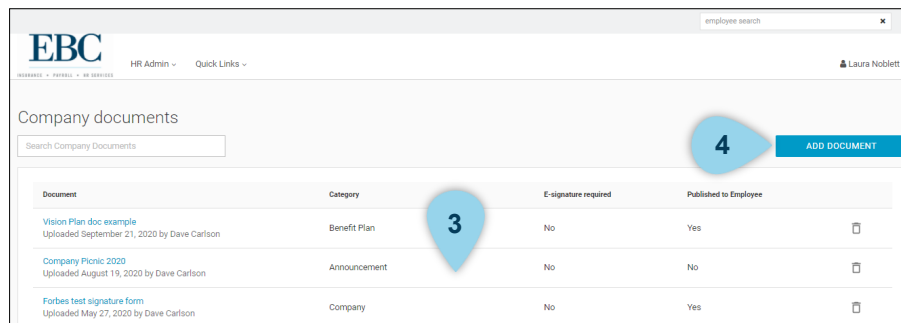
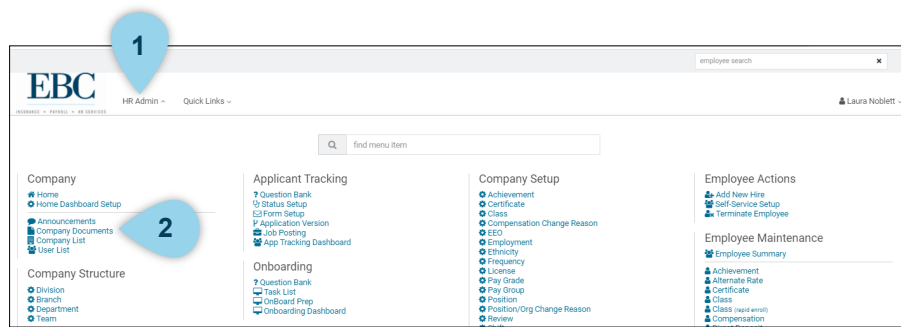


4. Pay stubs for the selected employee will be listed. Click the pay stub icon to download and view the pay stub.

Company

This section reviews how to view and add company documents.

Company Documents



To add a new company document,

1. Click on HR Admin.
2. Under Company, click Company Documents.
3. Click on a document line to view and update details (i.e. name, category, publish options, e-signature, etc).
4. To add a new document click the ADD DOCUMENT button.
5. Enter the document Display name.
6. Select a category (e.g. onboarding)
7. Toggle the Document options to choose if E-signature will be required and if this document will be published to employees.
8. Choose a file to upload.
9. Once your settings are complete, click the UPLOAD DOCUMENT button.

Applicant Tracking

This section reviews how to make a job posting and track applicants through the process.

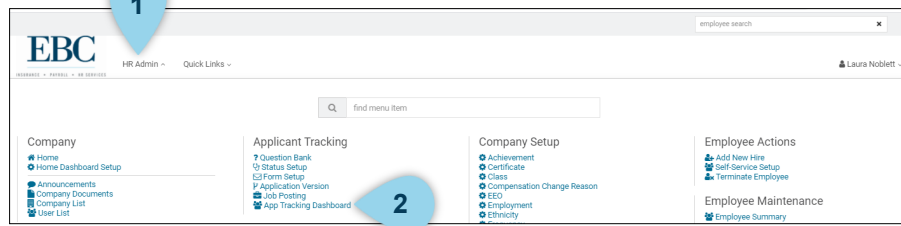
Post a Job
















To post a job,

1. Click on HR Admin.
2. Under Applicant Tracking, click Job Posting.
3. To delete a posting, click the trash can icon. This should only be done if the job posting will never be used again.
4. Toggle the Open option from YES and NO to turn the posting on and off.
5. Click on a job posting to review and edit details.
6. Click the DOWNLOAD button to download a job posting.
7. Click the NEW button to start a new job posting.
8. Select the company.
9. Toggle the Status to YES or NO to turn the posting on or off.
10. Choose options from the drop down lists in the Links To section.
11. Give your job posting a title and enter a description for the position.
12. Choose an Application Version.
13. A unique link will be created within each separate job posting screen. This can be copied and pasted into the company website, careers page, and/or any job boards where the job needs to be advertised. When an applicant clicks on the link, they will be prompted to complete all required information and questions, as well as upload a resume or other documents. Once complete, it will immediately update the dashboard.
14. Click SAVE CHANGES to save your job posting.

The first screenshot shows the EBC HR Admin dashboard. The 'HR Admin' menu is visible, and the 'Job Posting' option is highlighted under the 'Applicant Tracking' section. The second screenshot shows a list of job postings with columns for Actions, Title, Description, and Open status. The third screenshot shows the 'NEW RECORD' form for creating a new job posting, including fields for Company, Status, Links To, and a unique Job Posting Key.

Applicant Tracking Dashboard



Actions	Complete Date	Name/Email	Job	Status	Referral Source	City/State	Keywords
  	11/13/2020 04:08 PM	Hilary, Agnes - (nyipari@yahoo.com)	Administrative Assistant, Buffalo, NY	Application Completed		Buffalo, NY	
  	10/21/2020 11:10 AM	Nanula, Kerri - (kerri@nanula@gmail.com)	Administrative Assistant, Buffalo, NY	Application Completed		Cheektowaga, NY	Orchard Park, West Seneca, Cheektowaga
  	08/13/2020 04:19 PM	Carlson Test, David - (dcarlson@ebcinc.net)	Lead Teacher West Seneca	Prep for Onboarding		Buffalo, NY	Hamburg, Orchard Park, West Seneca
  	07/26/2020 01:57 PM	Lanzo, AnaAngelica - (Angelica23@yahoo.com)	Administrative Assistant, Buffalo, NY	Application Completed		Buffalo, NY	
  	07/22/2020 10:23 AM	Macdonald, Olivia - (omac617@aol.com)	Administrative Assistant, Buffalo, NY	Application Completed		Buffalo, NY	

Job Posting - Ebc Demo2 OPEN

Administrative Assistant, Buffalo, NY

Located in Downtown Buffalo, EBC, Inc. is growing. In business since 2004, we are a provider of insurance, payroll, and human resources services to Western New York businesses and we offer a customized approach to client needs. As part of our growth, we are looking for an HR/Benefits Assistant to join our team. This role will also be the company's Receptionist. This is a full-time position with days of work Monday through Friday. The person in this role provides general office support with a variety of clerical activities and related tasks. It is a unique opportunity to work across departments and be involved in different types of projects.

- For the HR and Benefits responsibilities, this role will assist with the administration of the day-to-day operation of the human resources functions and duties.
- In addition, this role will assist with enrollments, billing, and compliance. Will have regular contact with the carriers and external vendors. May assist in planning Health and Wellness related initiatives.
- This role will be responsible for answering incoming calls, greeting visitors, directing calls to appropriate associates, mail distribution, flow of correspondence, requisition of supplies as well as additional clerical duties, such as photocopying, faxing, filing and collating.
- Candidates must have strong customer service skills, organizational skills and attention to detail. This is largely a sedentary role; however, interaction with other departments is a necessity and will require movement around the office. This would require the ability to lift files, use standard office equipment, open filing cabinets and bend or stand as necessary.
- Candidates should have an Associate's degree or equivalent and at least two years of administrative experience. HR and/or benefits experience is desired. Proficiency with Microsoft Office is required, particularly PowerPoint and Excel.

Please follow through the steps below to apply.

Status	Name	Email
Application Completed	Agnes Hilary	nyipari@yahoo.com
Link to Application	Referral Source	
http://ebcinc.evolutionadvancedhr.com/JobApplication.aspx?jobpostingkey=5e77ab73-3aa1-4a65-939a-f66f51352d1b&jobapplicationkey=204e5478-3cd1-4956-d14c-1986536e336f5		

Profile

Name	Current Address	Military Service
First Name*	Address Line 1*	Military Reserve
Agnes	233 E Eagle St Apt 201	No
Middle Name	Address Line 2	Veteran*
AUSA		No
Last Name*	City*	
Hilary	Buffalo	

8 **9**

SAVE CHANGES SAVE & NEXT RECORD PREV RECORD NEXT RECORD CLOSE

To track the status of a job posting,

1. Click on HR Admin.
2. Under Applicant Tracking, click App Tracking Dashboard.
3. To delete an applicant, click the trash can icon.
4. To review history, notes, and documents about the applicant, click on the job posting.
5. Results can be filtered based on any details shown in the line items (e.g. Job Title, Location, Key Words).
6. Sort the results by clicking on any of the column headers.
7. Click on the middle action icon for workflows such as: schedule interview, application reviewed, reject application, develop or extend offer, onboard prep, etc. workflows will send a customizable email notification to included parties – e.g. applicant, hiring manager, HR Admin, etc.
8. Review and edit applicant information as needed.
9. Click the SAVE CHANGES button to save edits.

Extend an Offer

To extend an offer,

1. Open the Applicant Tracking Dashboard.
2. Locate the applicant and click on the settings icon in the Actions column.
3. Under the Change Status section, click on the drop down option.
4. Select a Make an offer.
5. Click the button SAVE CHANGES.

EBC HR Admin - Quick Links - Laura Noblett

Applicant Tracking Dashboard

JOB POSTINGS DOWNLOAD filter grid... ADVANCED FILTER

Actions	Complete Date	Name/Email	Job	Status	Referral Source	City/State	Keywords
	11/13/2020 04:08 PM	Hilary, Agnes - (nyipari@yahoo.com)	Administrative Assistant, Buffalo, NY	Application Completed		Buffalo, NY	
	10/21/2020 11:10 AM	Nanula, Kerri - (kerri@nanula@gmail.com)	Administrative Assistant, Buffalo, NY	Application Completed		Cheektowaga, NY	Orchard Park, West Seneca, Cheektowaga
	08/13/2020 04:19 PM	Carlson Test, David - (dcarlson@ebcinc.net)	Lead Teacher West Seneca	Prep for Onboarding		Buffalo, NY	Hamburg, Orchard Park, West Seneca
	07/26/2020 01:57 PM	Lanzo, AnaAngela - (Angelyka23@yahoo.com)	Administrative Assistant, Buffalo, NY	Application Completed		Buffalo, NY	
	07/22/2020 10:23 AM	Macdonald, Olivia - (omac617@aol.com)	Administrative Assistant, Buffalo, NY	Application Completed		Buffalo, NY	

Status: Application Completed Name: Agnes Hilary Email: nyipari@yahoo.com

Change Status

If you need to update the status of this application, this is the place to do it. If the new status has a workflow attached, you will be prompted for additional information depending on the workflow.

Application Completed - Application Completed

EBC Job Posting - Ebc Demo2 OPEN

Applicant Tracking Dashboard

JOB POSTINGS

Actions

Please Choose (representative BLANK)

Application Started - Application Started

Rejected / Incomplete - Application rejected due to incomplete

Application Completed - Application Completed

Application Reviewed - Application Reviewed

Schedule Initial Interview - Schedule Initial Interview

Initial Interview Completed - Initial Interview Completed

Schedule 2nd Interview - Schedule 2nd Interview

Develop Offer - Develop Offer

Make Offer - Make Offer

Offer Accepted - Offer Accepted

Offer Rejected - Offer Rejected

Application Rejected - Application Rejected

Prep for Onboarding - Prep for Onboarding

Prep for Onboarding - Prep for Onboarding

Onboarding Complete - Onboarding Process Completed

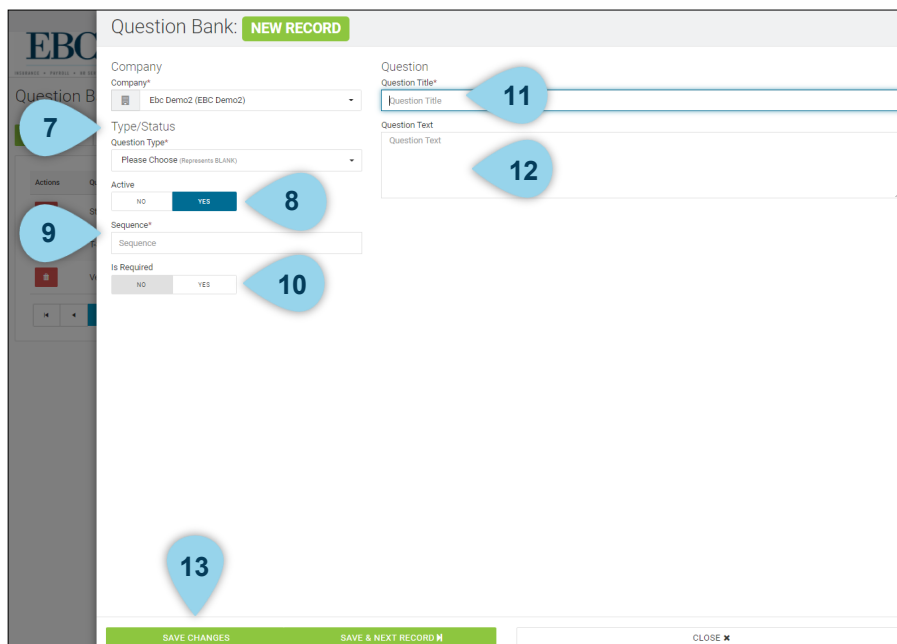
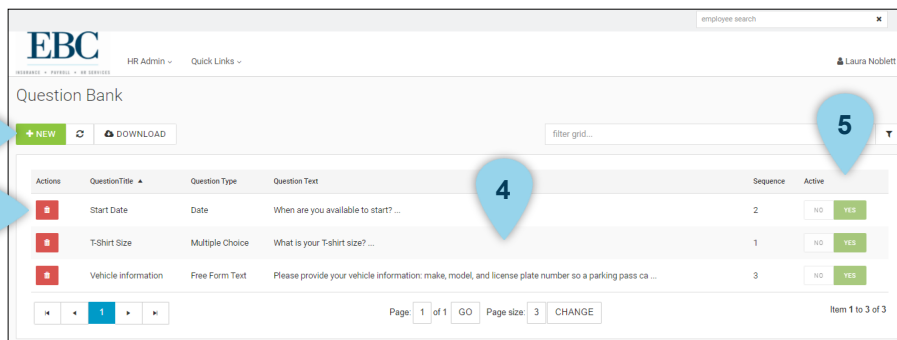
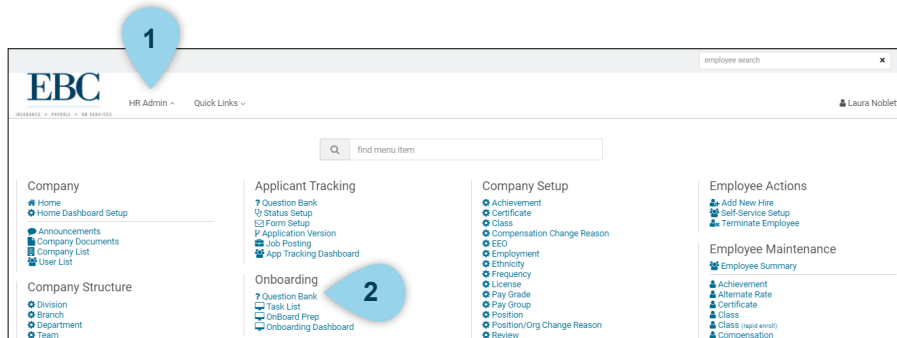
Application Completed - Application Completed

SAVE CHANGES SAVE & NEXT RECORD PREV RECORD NEXT RECORD CLOSE

Onboarding

This section reviews how to onboard new employees.

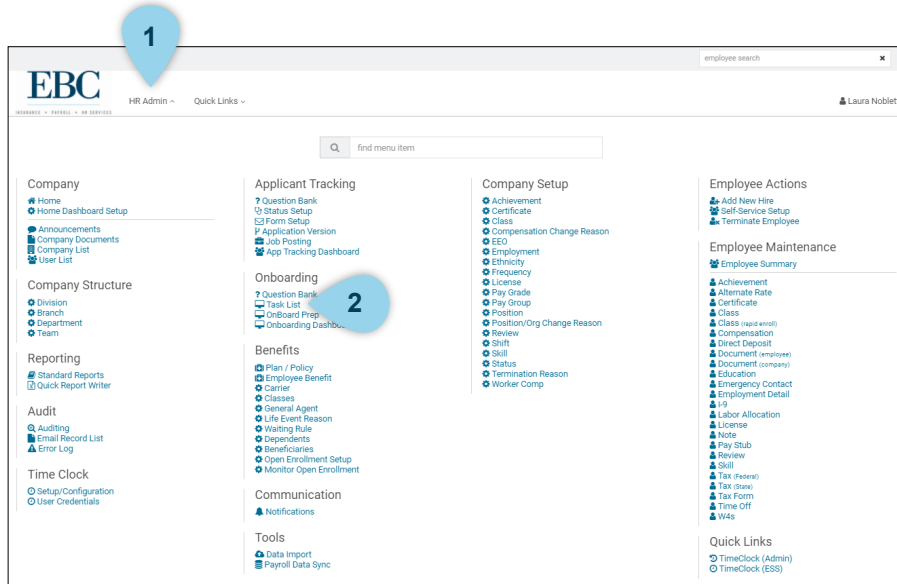
Question Bank



Use the Question Bank to create custom questions to ask on an onboarding task list (Task Lists will be reviewed next). To review or create a question bank,

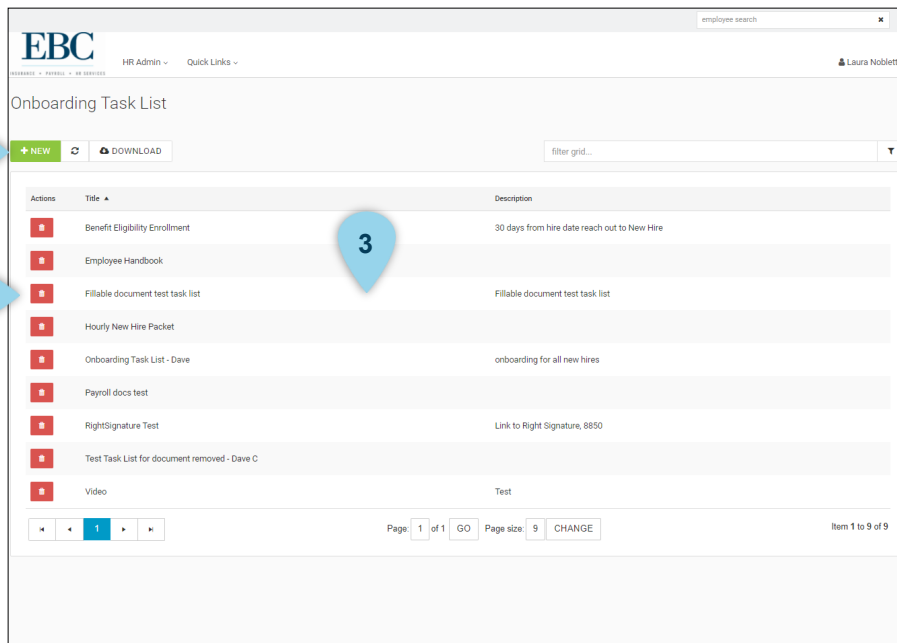
1. Click on HR Admin.
2. Under Onboarding, click Question Bank.
3. Click on the trash icon to delete a question.
4. Click on the question line to review and edit a question.
5. Toggle Active options between YES and NO to active or deactivate a question.
6. Click on the NEW button to create a new question.
7. Select the question Type/Status from the drop down list.
8. Toggle the Active option between YES and NO to activate or deactivate the question.
9. Enter a number in the Sequence box that will determine the order this question will display.
10. Toggle the Is Required option between YES and NO to make the question required or not.
11. Enter a Question Title.
12. Enter the Question Text.
13. Click the SAVE CHANGES button.

Task List



Set up a task list to include all details needed from a new employee. To access this feature,

1. Click on HR Admin.
2. Under Onboarding, click Task List.



3. Click on a task list to review and edit details.
4. Click on the trash can icon to delete an existing task list.
5. Click on the NEW button to create a new task list.

Task List

Onboarding Task List: **NEW RECORD**

Company
Company*
Ebc Demo2 (EBC Demo2)

Task List
Title*
Title

Description
Description

Custom Doc Upload Note
List Documents

Steps
Mark and setup the sections below that you want included in this onboarding task list.

Include Welcome Note
NO YES

Include Direct Deposits
NO YES

Include i9
NO YES

Include Background Check Authorization
NO YES

Include Custom Questions
NO YES

Include Custom Document Upload
NO YES

Include End Note and E-Signature
NO YES

Include Company Documents
NO YES

Select/Change Company Documents
Select a document

Documents

Custom Question Selection
After you complete the Onboarding Task List creation, you may come back here and link questions from the question bank.
Linked Questions

Welcome and End Notes
Welcome Note
End Note

SAVE CHANGES SAVE & NEXT RECORD CLOSE

6. Give your task list a title.
7. Enter a description for the task list.
8. List documents in the Custom Doc Upload Note box.
9. In the Steps section, toggle between YES and NO to choose the sections you want to include.
10. Select any company documents to include.
11. Link custom questions from the question bank.
12. Enter Welcome and End notes.
13. Click the SAVE CHANGES button to finish creating the new task list.

Onboard Prep

The screenshot shows the EBC HR Admin interface. A blue circle with the number 1 points to the 'HR Admin' link in the top navigation bar. Another blue circle with the number 2 points to the 'Onboard Prep' link in the 'Onboarding' section of the left sidebar. The main content area shows a search bar and a list of menu items under various categories like Company, Applicant Tracking, Company Setup, and Employee Actions.

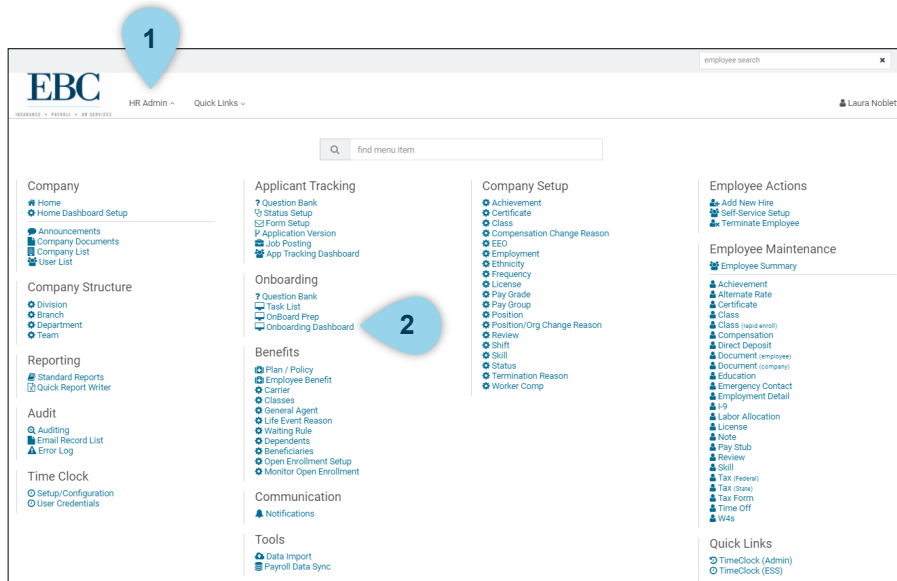
The screenshot shows the 'OnBoarding Prep Process' form, specifically 'STEP 1 - Type of Hire'. The form includes fields for 'Company' (Ebc Demo2 (EBC Demo2)), 'Tax Form (Type of Hire)' (W2 - Employee), 'Hire Date' (11/30/2020), 'Position' (Please Choose), 'Employee ID' (57), and 'Onboarding Task List' (Please Choose). A blue button at the bottom right says 'LET'S BEGIN ONBOARDING'.

The screenshot shows the 'OnBoarding Prep Process' form, specifically 'STEP 2 - Fill out Employee information'. The form is divided into several sections: 'Profile' (First Name, Last Name, Email, Clock Number), 'Compensation' (Pay Type, Rate), 'Payroll' (Pay Frequency, Standard Payroll Hours), 'Benefits' (Eligible For Benefits, Medical Coverage Offered, Benefit Class / Eligibility Group), 'Taxes' (State Tax, SUI State, SDI State), and 'Taxes' (State Tax, SUI State, SDI State).

Use the Onboard Prep option to assign rate of pay, supervisor, location details. This will send a link to employee to complete everything paperless: I-9, W4, State Tax form, Direct Deposit, Emergency Contact, any company documents, etc. To access the Onboard Prep feature,

1. Click on HR Admin.
2. Under Onboarding, click Onboard Prep.
3. Select the new employee's position from the drop down list.
4. Choose an Onboarding Task list from the drop down list.
5. Enter a Hire Date.
6. Click the LET'S BEGIN ONBOARDING button.
7. Fill out the employee information then submit the onboarding request for the employee to complete.

Onboarding Dashboard



To review and update an employee's status through the onboarding process,

1. Click on HR Admin.
2. Under Onboarding, click Onboarding Dashboard.

The screenshot shows the EBC Onboarding Dashboard. The 'ONBOARDING PREP' button is highlighted with a blue circle and the number 4. The 'filter grid...' dropdown is highlighted with a blue circle and the number 3. The table below lists employees and their onboarding status.

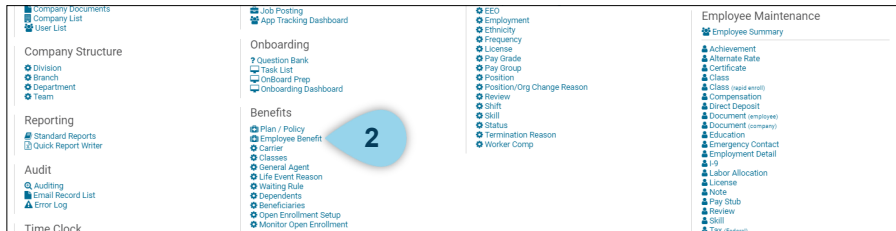
Actions	Name/ID	EmailAddress	Status	Hire Date	Tax Form
	Hill, Brad - (12)	Bhill@sharkladders.com	Prepped - 12/20/2017 09:52 AM	12/20/2017	W2
	Carlson, David - (53)	dcarlson@ebcinc.net	Prepped - 07/30/2020 04:15 PM	07/30/2020	W2
	DiTondo, Jeff - (24)	jditondo@ebcinc.net	OB Started - 07/26/2019 01:30 PM	07/26/2019	W2
	Ortolani, Marina - (28)	mortolani@tedshotdogs.com	OB Started - 11/20/2019 11:28 AM	11/26/2019	W2
	Erb, Sara - (29)	serb@ebcinc.net	OB Started - 12/03/2019 04:29 PM	12/03/2019	W2
	Newemployee, David - (37)	dcarlson@ebcinc.net	OB Started - 03/10/2020 12:33 PM	03/10/2020	W2
	Wright, Joan - (38)	dcarlson@ebcinc.net	OB Started - 03/26/2020 10:00 AM	03/26/2020	W2
	Trumble, Janice - (39)	dcarlson@ebcinc.net	OB Started - 04/21/2020 01:04 PM	04/21/2020	W2

3. The employees onboarding status can be viewed at a glance by scrolling through the list of employees and reviewing the information in the Status column.
4. Click on the envelope icon to send an onboarding invitation.
5. Click on an employee line to review or edit employee details.

Benefits

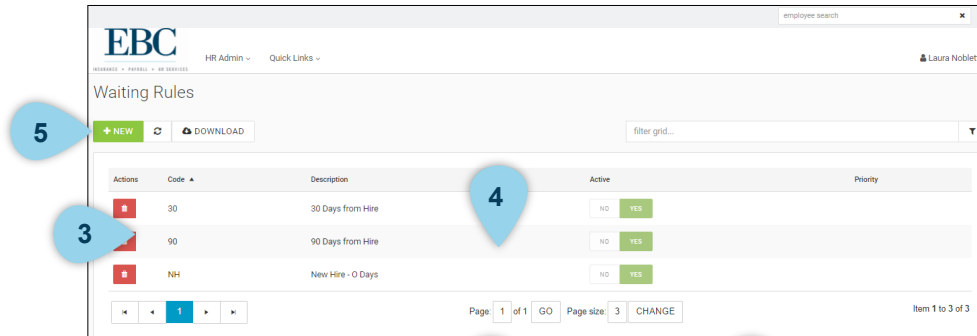
This section reviews how to manually add employee benefits and set up open enrollment.

Waiting Rule

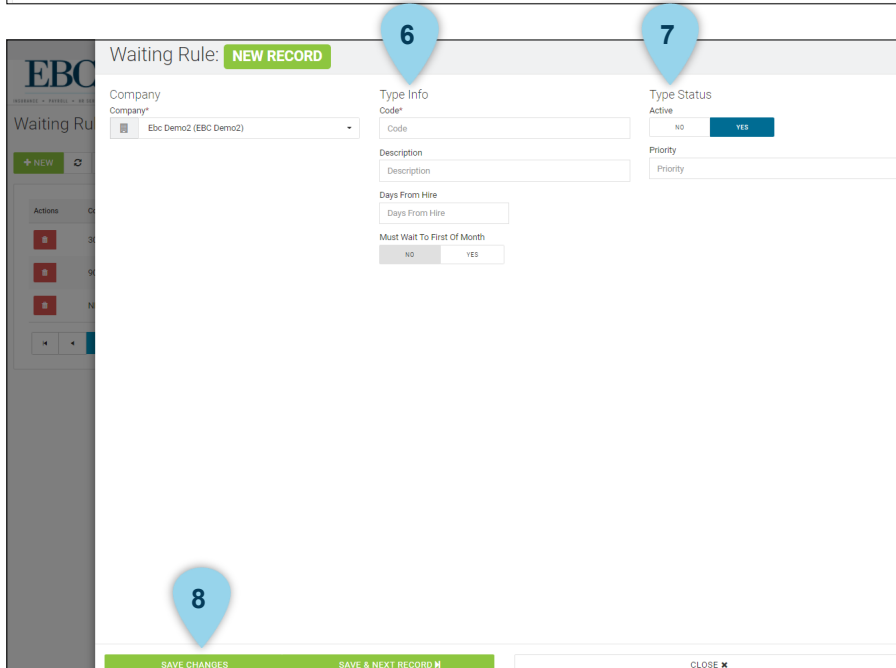


To review or enter a waiting rule,

1. Click on HR Admin.
2. Under Benefits, click Waiting Rule.

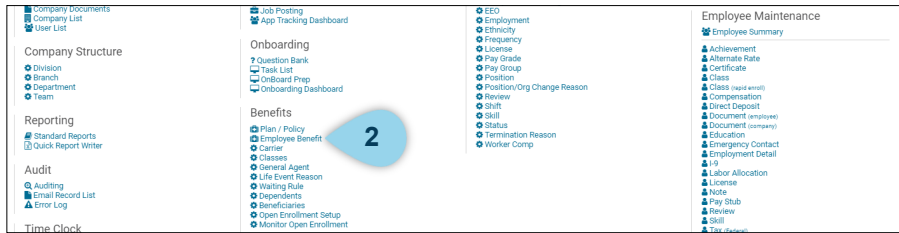


3. Click on the trash can icon to delete a waiting rule.
4. Click on a rule line to review and edit an existing waiting rule.
5. Click the NEW button to create a new waiting rule.



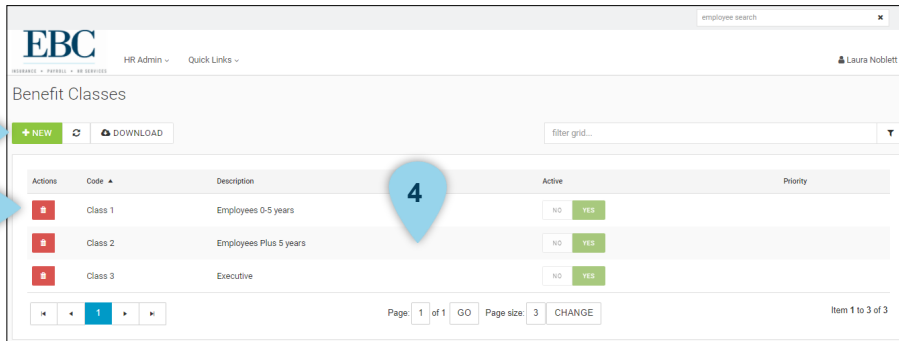
6. Enter Type info.
7. Update the Type Status.
8. Click the SAVE CHANGES button.

Classes

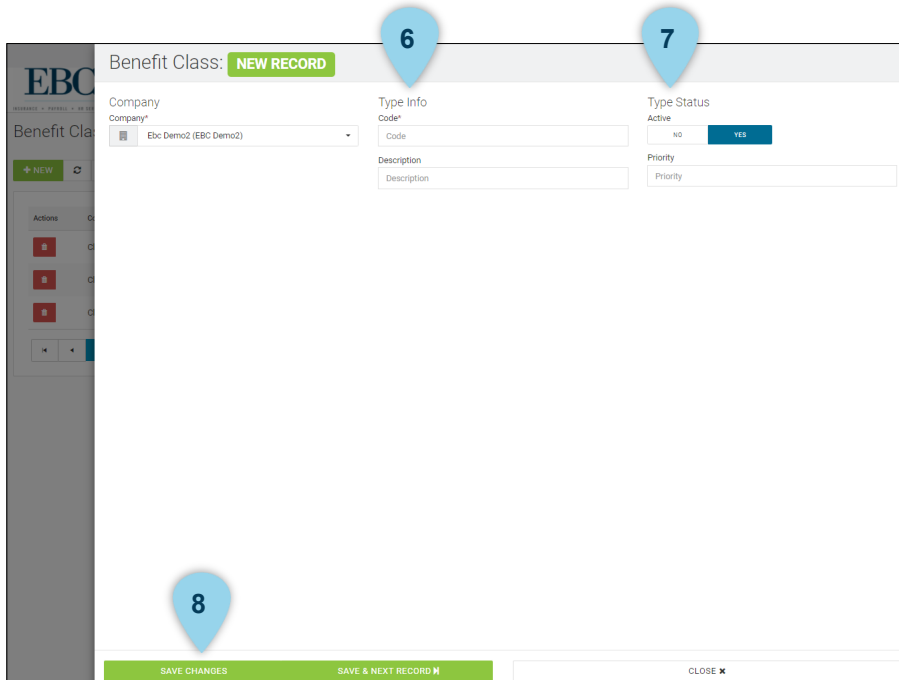


To review or add a class,

1. Click on HR Admin.
2. Under Benefits, click Classes.



3. Click the trash can icon to delete a class.
4. Click on a class line to review and edit the class.
5. Click the NEW button to create a new class.

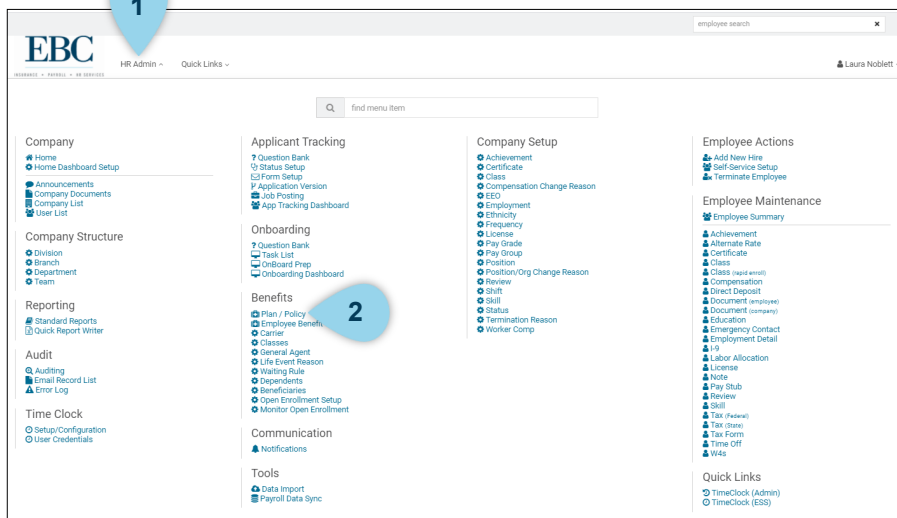


6. Enter Type info.
7. Update the Type Status.
8. Click the SAVE CHANGES button.

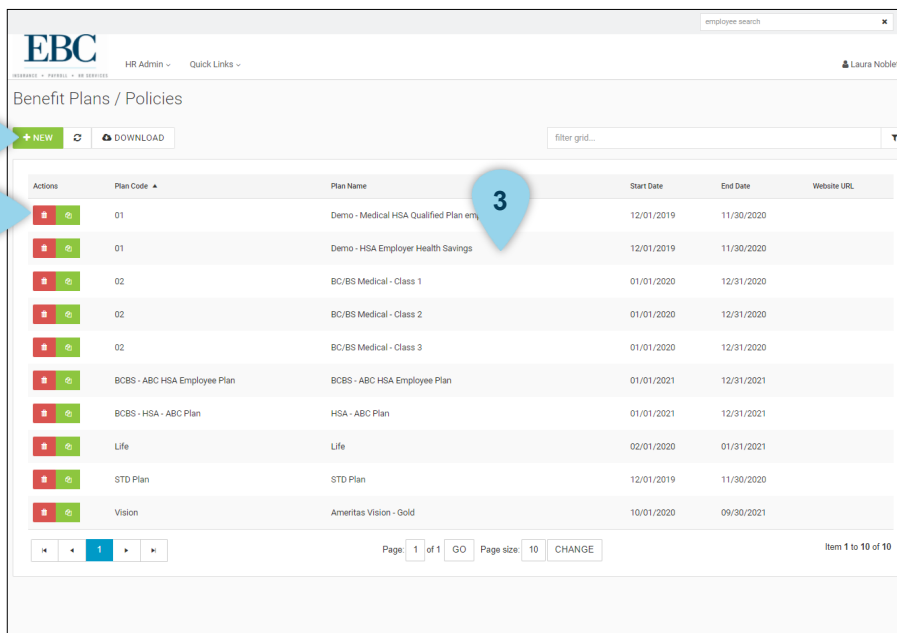
Set Up Plans and Policies

To post a set up a plan or policy,

1. Click on HR Admin.
2. Under Benefits, click Plan/Policy.



3. Click on a plan/policy to review or edit details.
4. Click on the trash can icon to delete a plan/policy.
5. Click the NEW button to add a new plan/policy.



Set Up Plans and Policies

Benefit Plan / Policy: **NEW RECORD**

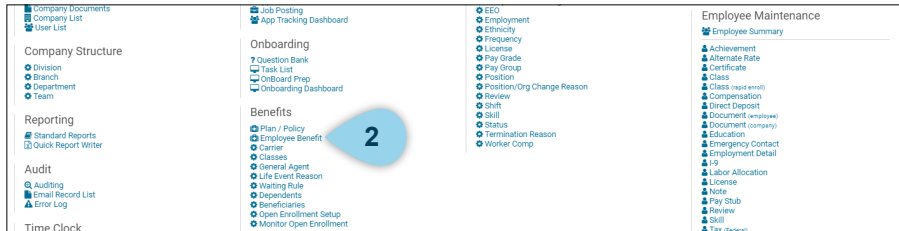
6 Company
Company*
Ebc Demo2 (EBC Demo2)

8 Plan / Policy Info
Active
NO YES
Priority
Priority
Plan Code*
Code
Plan Name*
Description

7 Plan / Policy Details
Plan / Policy Type*
Please Choose (Represents BLANK)
Carrier*
Please Choose (Represents BLANK)
Alternate ID
Alternate ID
Renewal Date
Renewal Date
Website Password
Website Password
Notes
Eligibility & Enrollment
Waiting Rule
Please Choose (Represents BLANK)
Enrollment Restrictions
Please Choose (Represents BLANK)
Payroll Deduction Integration
Employer Deduction Code
Please Choose (Represents BLANK)
Employee Deduction Code
Please Choose (Represents BLANK)
Payroll Deduction Frequency
Please Choose (Represents BLANK)
Documents
Browse or Drag/Drop documents
Temporarily Uploaded Documents
Drag & drop files here ...
BROWSE ...
Rates
Rate Structure*
Please Choose (Represents BLANK)
SAVE CHANGES
CLOSE X

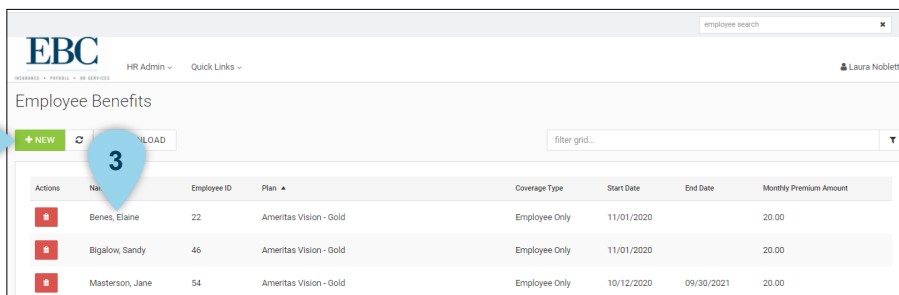
6. Choose a company from the drop down list.
7. Make selections in the Plan/Policy section.
8. Enter Plan Code and Plan Name in the Plan/Policy Info section.
9. Enrollment Restrictions to apply the correct classes from above.
10. Assign the Employer and/or Employee Deduction Codes and Frequency - needed for payroll
11. Rate Structure – controls ER and EE monthly costs for benefit coverages
12. Benefit Naming convention should include the year Plan Code field for easy sorting during maintenance and set-up changes
13. Click the SAVE CHANGES button to save the new plan/policy.

Employee Benefits



To manually enroll an employee in benefits,

1. Click on HR Admin.
2. Under Benefits, click Employee Benefits.



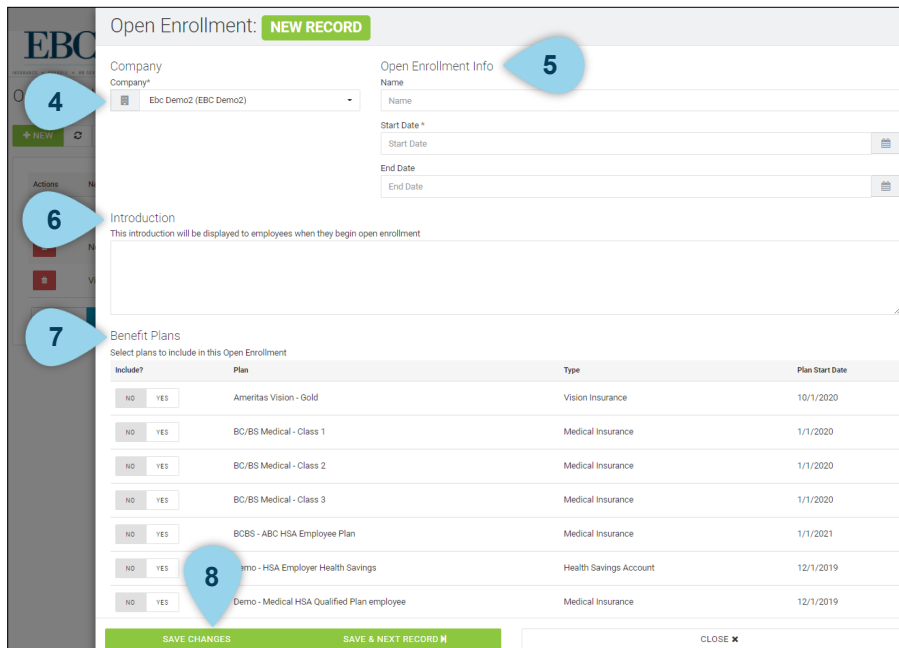
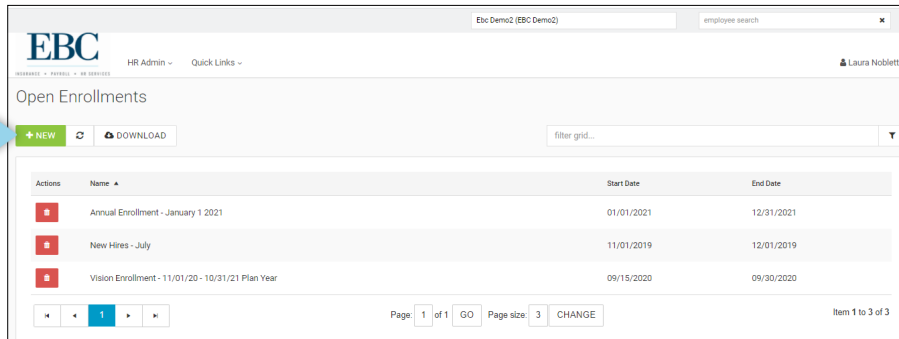
3. The list will be sorted alphabetically by plan. Click on an employee to view and edit employee benefit details.
4. Click the NEW button to manually enroll and employee in a benefit plan.

5. Choose a company and employee from the drop down options in the Employee section.
6. Select a Qualifying Event and Start Date, enter a Member Number, and select a Payroll deduction Frequency in the Details Section.
7. Select Benefit Plan and Coverage Type in the Benefits Info section.
8. Enter Rates.
9. Click the SAVE CHANGES button.

Open Enrollment Setup

To set up a new open enrollment,

1. Click on HR Admin.
2. Under Benefits, click Open Enrollment Setup.
3. Click the NEW button.
4. Select a company from the drop down list.
5. Enter Name and Dates into the Open Enrollment Info section.
6. Enter a description into the Introduction box.
7. Toggle between NO and YES to include or exclude the listed options in the Benefits Plans section.
8. Click the SAVE CHANGES button to save the new open enrollment.



Monitor Open Enrollments

To monitor open enrollment selections,

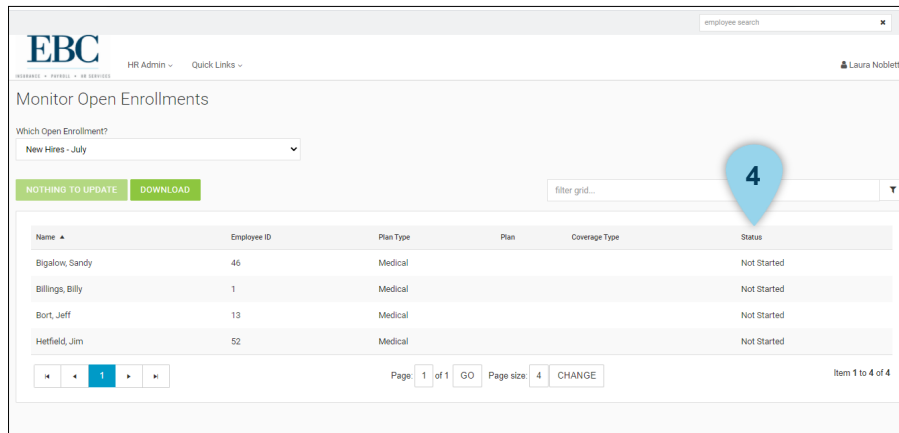
1. Click on HR Admin.
2. Under Benefits, click Monitor Open Enrollment.



3. Choose which open enrollment to review.



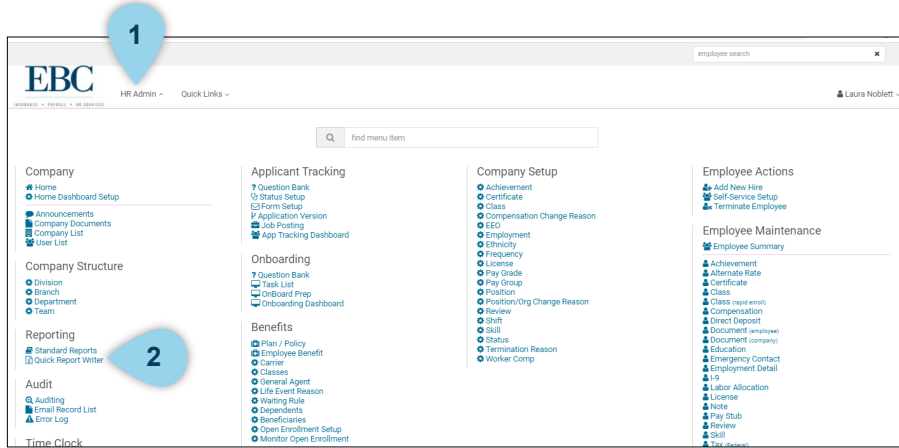
4. Scroll through the list to review plan type and completion status.



Reporting

This section reviews how to create and run reports using the Quick Report Writer function.

Quick Report Writer



To run a report using the Quick Report Writer,

1. Click on HR Admin.
2. Under Reporting, click Quick Report Writer.

3. Choose a Report Concept.
4. Once you have selected a concept, applicable field options will appear. Select fields that you want included on the report (i.e. Employee ID, Position, Company Name, etc.).
5. Sort and Filter options based on included report fields.
6. Enter a report name and description to save for later use.
7. Click the SAVE/UPDATE REPORT CONFIGURATION to generate the report.
8. Once a report has been created and saved, you may use it at a later time. To do this, select the saved report from the Existing Saved Report drop down option in the Choose Report section.
9. Click OUTPUT TO SCREEN for easy view or OUTPUT TO CSV to open in excel.