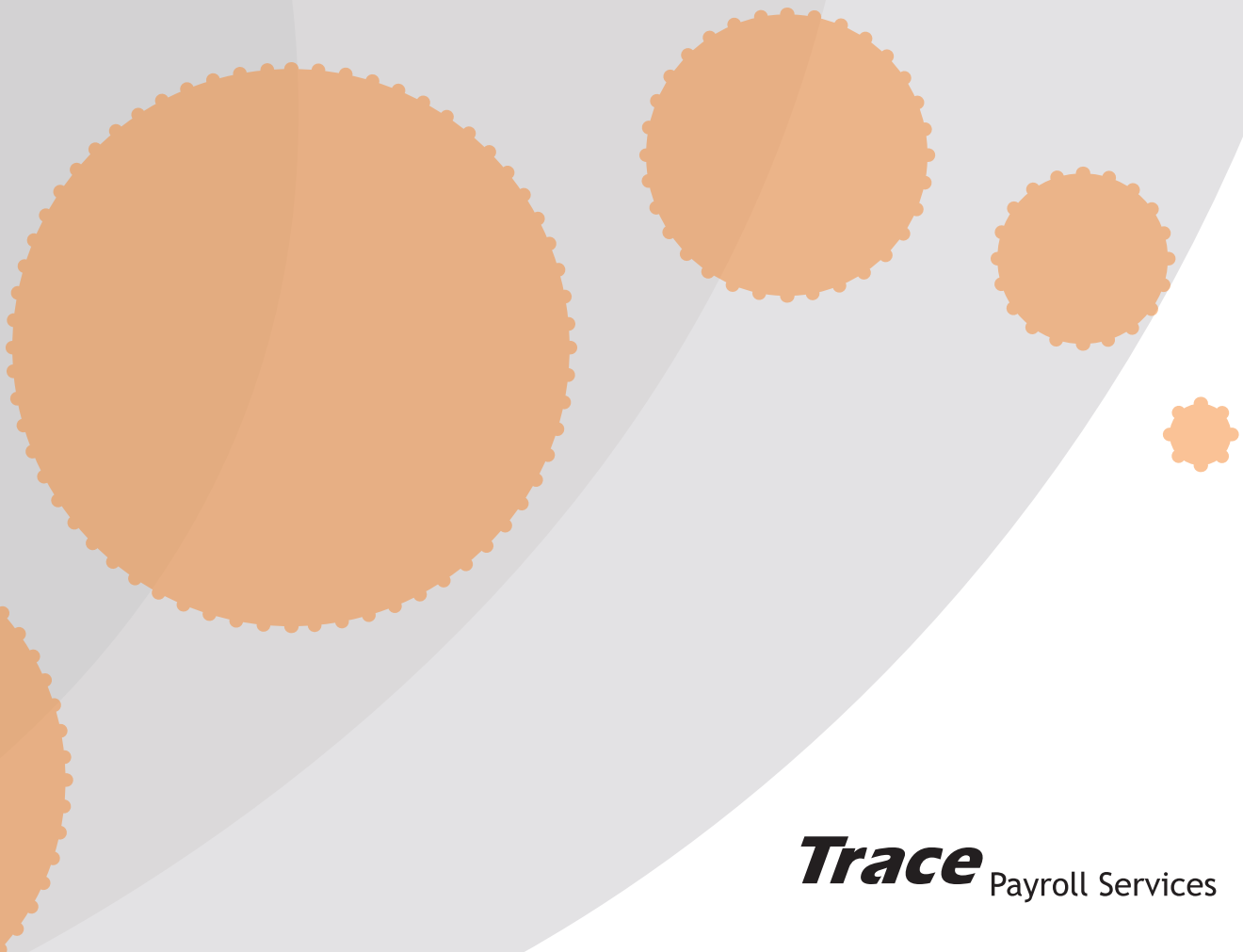




easipay plus hr

MANAGING YOUR PAYROLL AND HR ONLINE



Easipay *Plus* HR is the optional fully integrated HR module for Easipay *Plus*.

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Benefits of Easipay *Plus* HR

Easipay *Plus* HR has all the benefits of Easipay *Plus*, and:

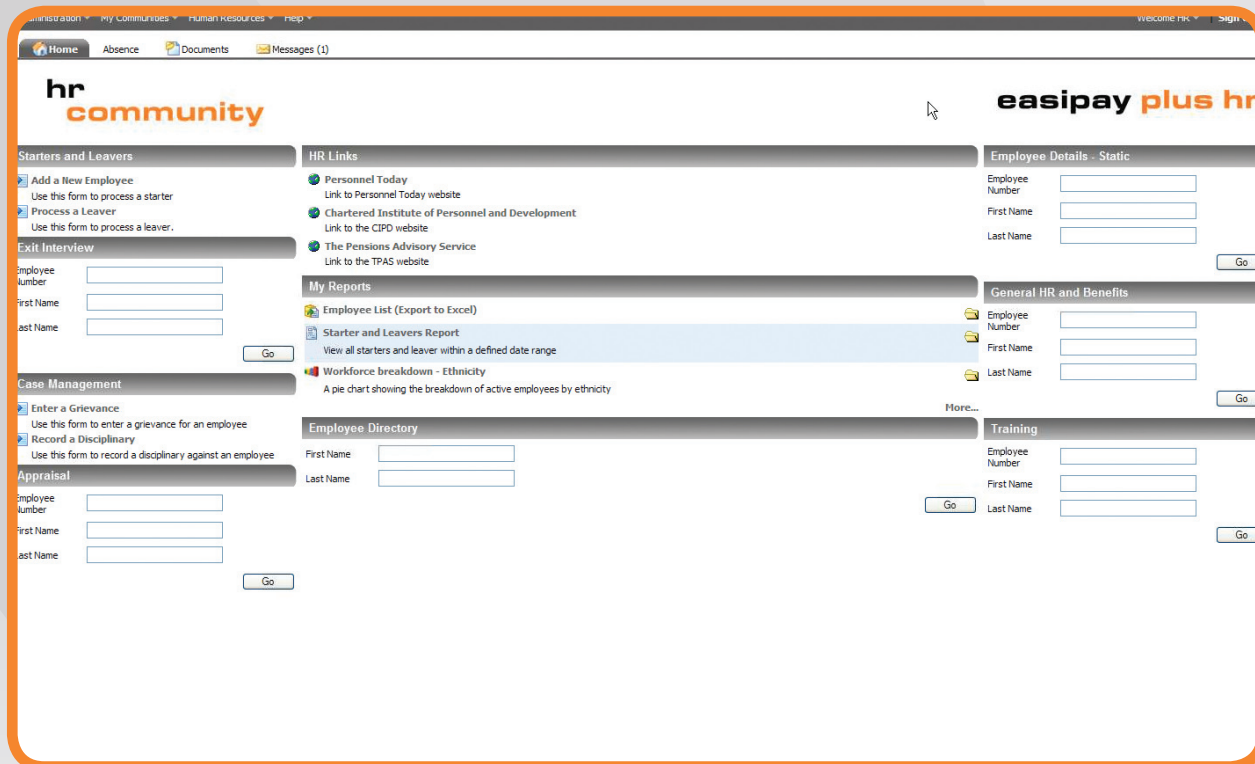
- Everything's in one place – employee details, HR data and payroll, all feed into a single database
- You only have to enter data once – if you add a new starter on your payroll system, their details are saved automatically in HR
- You only have to train your staff to use one system
- Although web-based, is very secure – find out how in our document Easipay *Plus* Security Overview



easipay plus hr

As with Easipay *Plus*, we configure the system to meet your business needs. You tell us what data fields you want to include, and who has access to different areas of the HR Community.

Easipay *Plus* HR Community



On the Easipay *Plus* HR Community page you'll find everything you need to manage your HR, including:

- Exit interviews
- Case management for grievances and disciplinary action
- Appraisals
- General HR data such as education, skills and much more
- Training records
- Quick links to HR websites and documents
- Reports
- Employee directory

You can add a new employee, process a leaver and change any of the static data for existing employees or add data for a new employee in the same way you can in Easipay *Plus*. You'll find this basic navigation in the Easipay *Plus* Payroll brochure.

Next you'll just find the features that are special to the HR module.

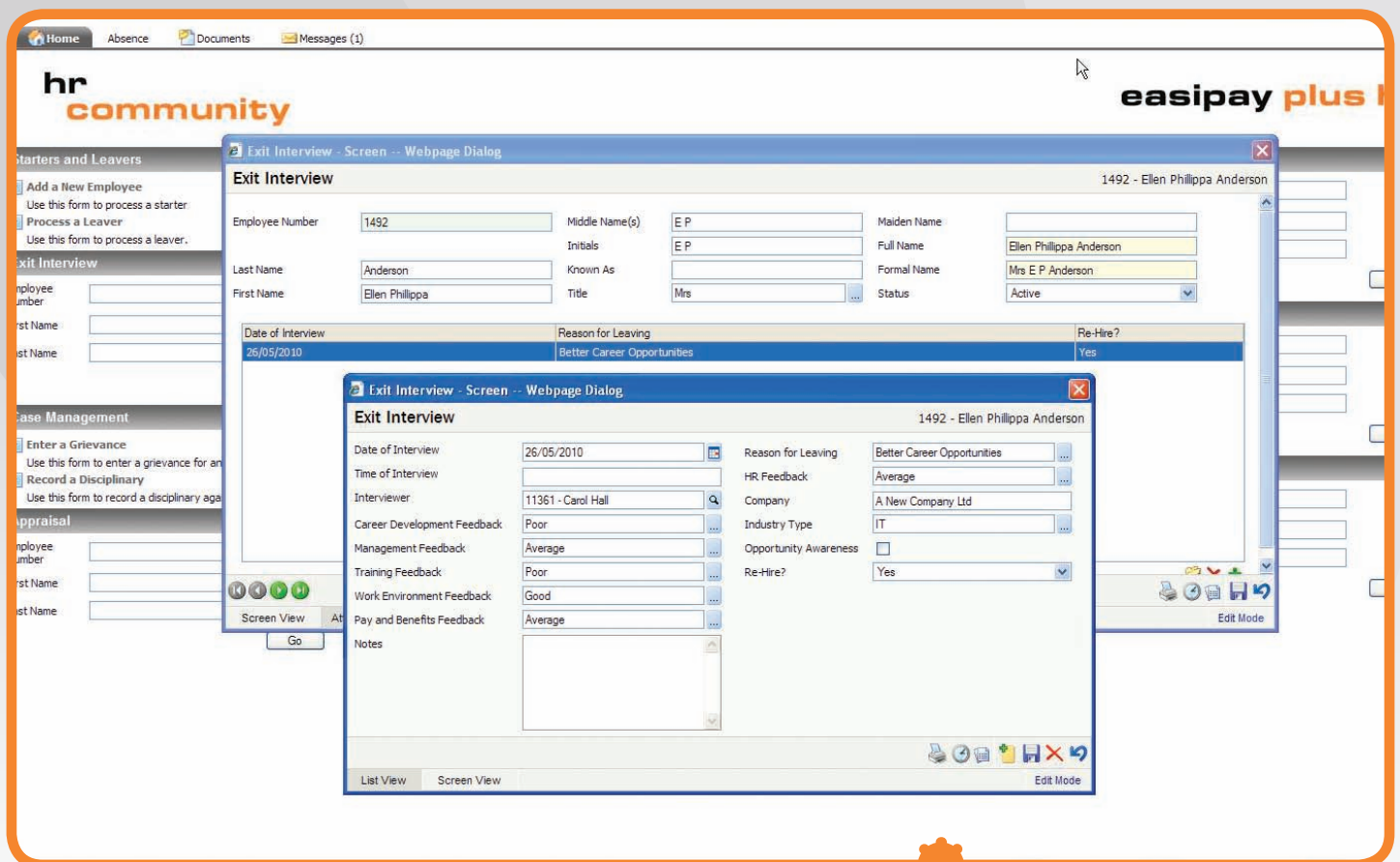
hr community

Exit interview

When an employee leaves, you can record feedback from them and see a summary of the exit interview, including:

- Date of interview
- Who interviewed the employee
- Reason for leaving
- New employer
- If you would re-hire this person

You can also add employee feedback on different aspects of your business.



When you want to: Record an exit interview



Enter their employee number or name in: "Exit Interview"



You'll see this window:

Exit interview. Click on the interview to enter and review more detail about the interview.

Case Management – Grievances and Disciplinaries

In Case Management you can store records of all employee grievances and disciplinary actions. This may include:

- Type of grievance or disciplinary action
- Dates of meetings
- Who attended meetings
- Action taken, including verbal and written warnings
- Whether you took legal advice
- Follow-up actions
- Follow-up dates

When you want to:
Enter a grievance



Click:
“Enter a grievance”



You’ll see this window:
Submit Employee Grievances

There is a field for ‘Other notes’ and you can also upload and attach correspondence files to the record.

When you want to:
Record a disciplinary action



Click:
“Record a Disciplinary”



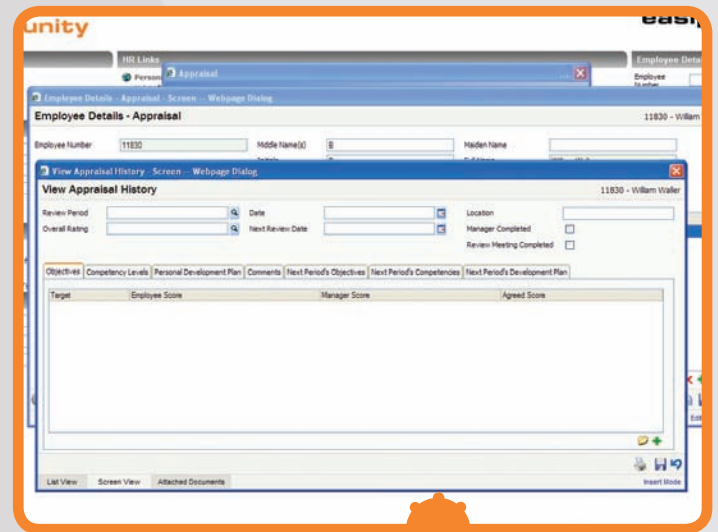
You’ll see this window:
Record a Disciplinary

If you later want to add information about the grievance or disciplinary, you can do this using the tabs in the General HR and Benefits section, see page 9.

Appraisals

In the Appraisal section you can view the appraisal history for the employee and you can drill down to get the detail. You can add details about:

- Objectives
- Competency levels
- Personal development plan
- Comments
- Next period's objectives
- Next period's competency
- Next period's development plan
- Review
- Sign off
- Pending



When you want to:
Add a new appraisal



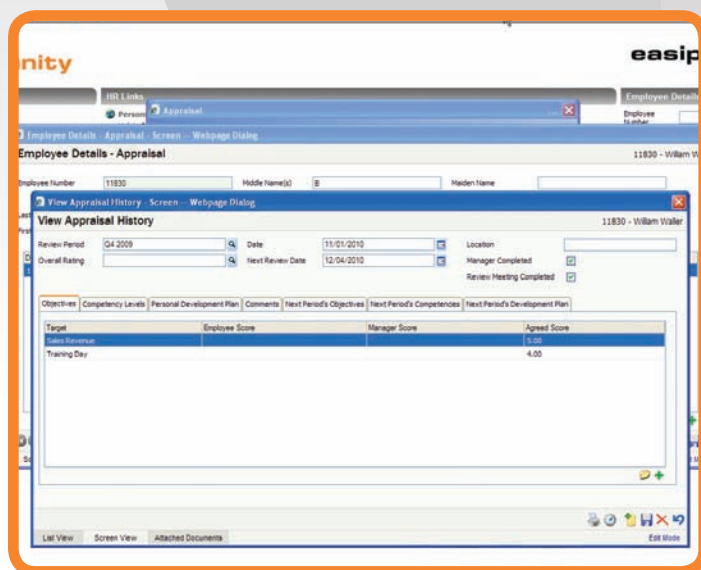
Click: The employee's name or number and click 'Go' > In the next window click the green + button



You'll see this window:
View appraisal history

If you prefer, you can log the basic appraisal details – including the next review date – and attach a copy of your own company appraisal form to the employee's record.

You can also set a trigger to remind you and the line manager of the employee's next appraisal date. You'll get this in an email and in your Message Box.



When you want to:
View or change an existing appraisal



Click:
The employee's name or number and click 'Go'



You'll see this window:
Employee Details – Appraisal

HR Links

Here, you can create quick links to the key websites that HR professionals read most, for example:

- Personnel Today
- Chartered Institute of Personnel Development
- Pensions Advisory Service
- ACAS
- DirectGov

Tell us the resources that you want to access and we'll configure this Links section for you. You can configure these links yourself, or change them at any time.

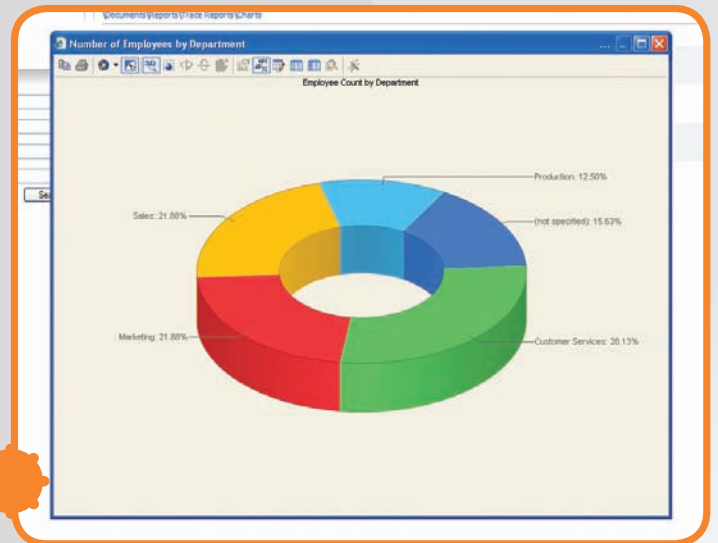
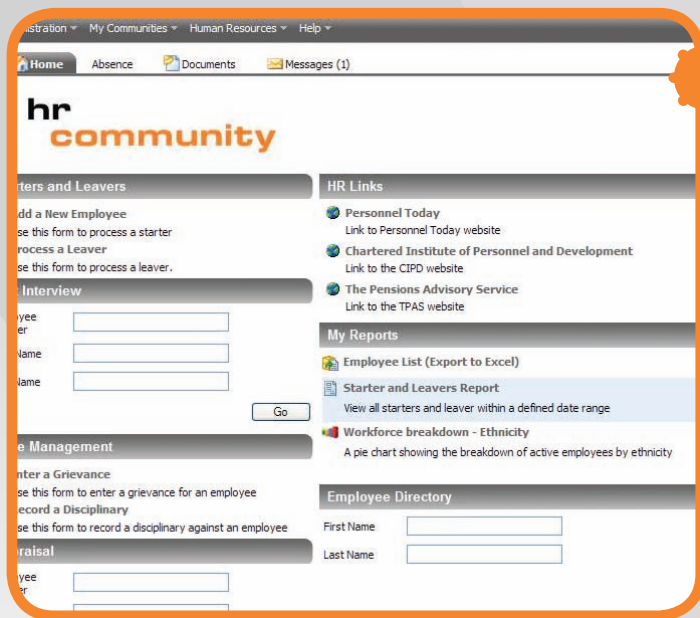
When you want to: View links to relevant publications and organisations



Go to:
HR Links



You'll see this:
HR Links



When you want to:
View a chart



Click: "My Reports" > choose the report from the list, the example shown is workforce breakdown by age group.



You'll see this window:
Workforce breakdown - Age group

My Reports

Your standard Easipay *Plus* system comes with more than 40 pre-configured reports, which are a mixture of PDF reports, data extracts and charts. We are adding to this library every day. You can have your most popular reports ready to open in the HR Community. You can also cut and paste charts and data extracts into documents or presentations.

Find out more about reports in the Easipay *Plus* brochure. If you want to generate your own reports, ask us about Report Writing Training.

General HR and Benefits

In the General HR and Benefits window you'll find the following data tabs that you can use to add more information about your employee:

- Dependents
- Education
- Languages
- Previous employment
- Knowledge and skills
- Permanent health insurance (PHI)
- Private medical insurance (PMI)
- Pension details
- Subscriptions
- Memberships
- Uniform details
- Disciplinary
- Grievance

When you want to:
Add or review employee data



Go to: "General HR and Benefits"
Enter the employee's name or number



You'll see this: Employee details – General HR and Benefits. Choose the tab you want. For example, if you want to add more information about a Grievance, click the Grievance tab.



The screenshot shows the 'Employee Details - General HR & Benefits' window in the HR Community software. The window title is 'Employee Details - General HR & Benefits - Screen -- Webpage Dialog'. The employee's name is '1492 - Ellen Philippa Anderson'. The form includes fields for Employee Number (1492), Middle Name(s) (E P), Maiden Name, Last Name (Anderson), Initials (E P), Full Name (Ellen Philippa Anderson), First Name (Ellen Philippa), Known As, Formal Name (Mrs E.P. Anderson), Title (Mrs), and Status (Active). Below the form are tabs for various data categories: Dependents, Education, Languages, Previous Employment, Knowledge, PHI, PMI, Pension Details, Subscriptions, Memberships, Uniform, Disciplinary, and Grievance. The 'Dependents' tab is active, showing a table with columns for Name, Relationship to Employee, and Age. The table contains one entry: Mark, Son, 10 Years 5 Months. At the bottom of the window, there is a search bar with a checked 'Exact search' option and a 'Go' button. The background shows the HR Community interface with a sidebar on the left containing options like 'Add a New Employee', 'Process a Leaver', and 'Enter a Grievance'.

Dependents

Here you can view details of an employees dependants including if adopted and if they are covered in the PMI scheme.

Education

You can view the employees educational details including the establishment name and dates attended

Languages

Here you can view any languages known by the employee and you can record their competency for understanding, speaking, reading and writing. This is particularly useful if you need to find an employee with a specific language skill.

Previous Employment

Here you can view the previous employment details for an employee including the company name, job title and dates employed.

Knowledge and skills

You can view any specific knowledge and skills that an employee has; this can include academic subjects, professional qualifications and any business skills.

Permanent Health Insurance

Here you can store details of any permanent health insurance you have in place for an employee and you can store details of the scheme, provider and much more.

Private Medical Insurance

Here you can store details of any private medical insurance you have in place for an employee and you can store details of the scheme, provider, cover details and if any dependants are covered.

Pension details

You can view the information about the employee's pension here.

Subscriptions

Here you can store details of any subscriptions that an employee has, the cost, renewal date and if the company pays the fee.

Memberships

Here you can store details of any memberships that an employee has, the organisation, the membership type and number, renewal date and if the company pays the fee.

Uniform details

You can view the information about any uniforms issued to an employee including the date issued and returned and the replacement reason.

Disciplinary

Here you can view, amend or add new cases for an employee. It is possible to log the type, the reason, the date, any follow-up date, the release date and if a letter was sent. In addition you can log the details of any participants, actions, legal advice and notes.

Grievance

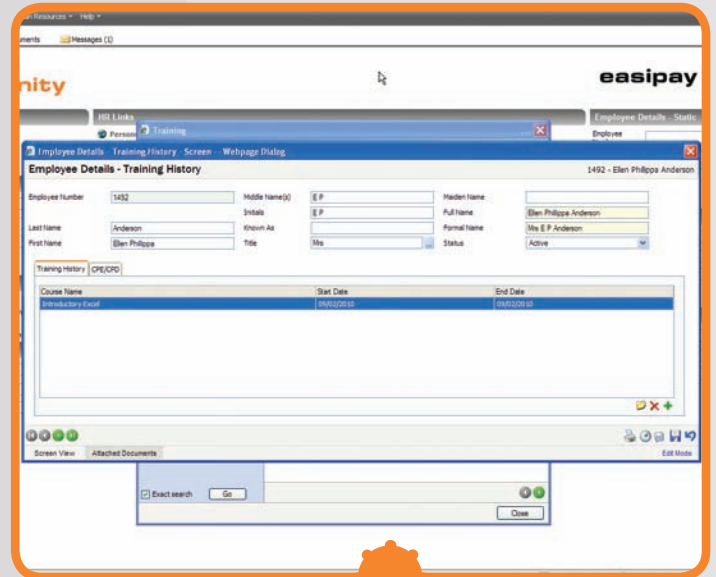
Here you can view, amend or add new grievances for an employee. It is possible to log the type, the reason, the date, any follow-up date and the release date. In addition you can log the details of any participants, legal advice, follow-up actions and notes.

Training

Easipay Plus HR makes it easy to record and store information about your employees' training and continuing professional development. Information you can store here includes:

- Details of course(s) attended
- Course content
- Structured learning points
- Trainer notes, manager notes and general comments

When qualifications need renewing, such as first aid, we can configure your system to send you messages to remind you of expiry dates.



When you want to:

Review or update an employee's training history



Click: "Training" and enter the employee's name or number



You'll see this window: Employee details – Training history



When you want to:

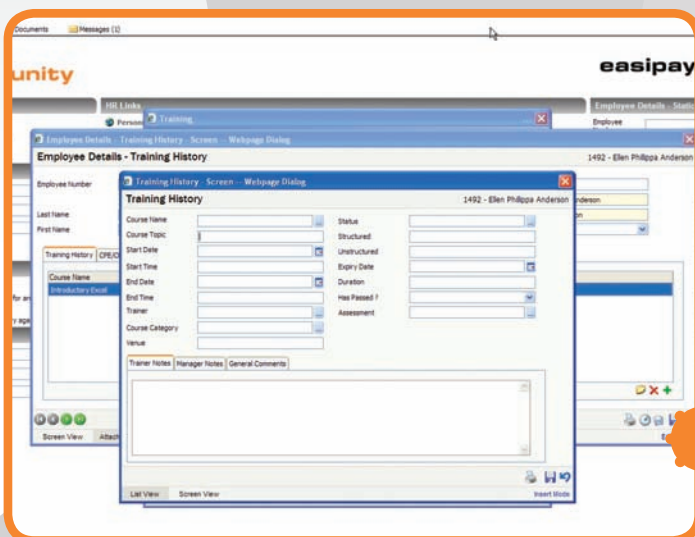
Update an employee's training history



Go to: "Training > Employee details > Training history and click on the green + button"



You'll see this window: Training history



Employee Directory

When we set up your Easipay *Plus* HR system, we'll ask you what columns you want to see here, for example:

- Surname
- First name
- Work telephone
- Extension
- Department

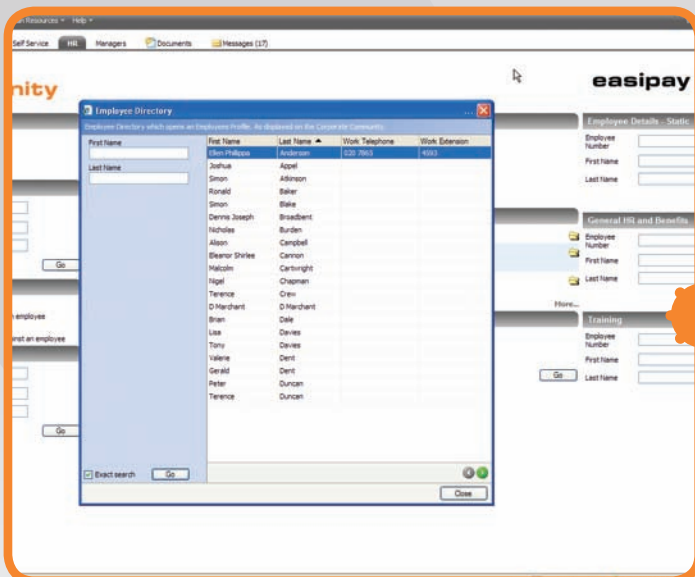
When you want to:
See a list of employees



Go to: "Employee directory"
Click on Go



You'll see this window:
Employee Directory



We don't give you a huge screen with fields you'll never use.

You can view a list of all employees first.

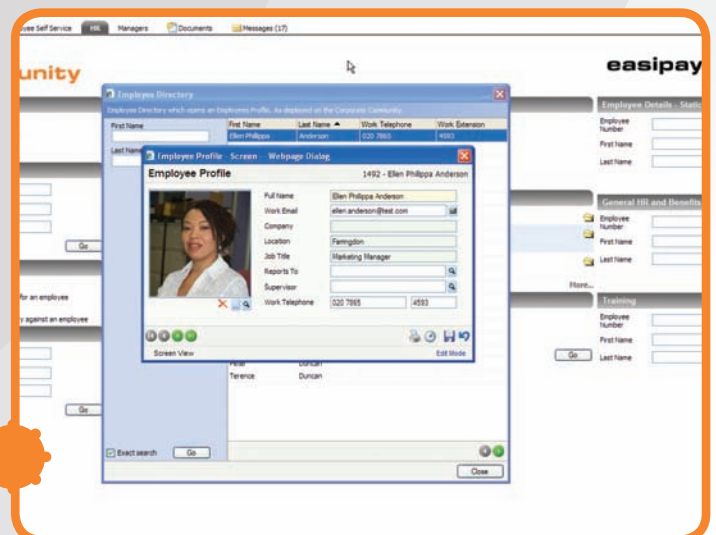
When you want to:
See an employee's profile



Go to:
"Employee Directory"
Click on the employee you want to view



You'll see this window:
Employee Profile



We hope this brochure has shown you how easy it is to use our Easipay *Plus* HR system for managing your HR data. We set it up exactly as you want it and you can give access to other members of your HR team.

Our Easipay *Plus* brochure has more in-depth details of the other tasks, like Starters and Leavers that are also included in Easipay *Plus* HR.

If you still have questions, or would like a face-to-face demonstration, or would like access to our demonstration system, call us now on

0845 873 5619

or visit

www.tracepayroll.com

To find out about the security of Easipay *Plus*, ask for a copy of our Easipay *Plus* Security Overview, or download it from our website

www.tracepayroll.com

Find out more...