

HDIS

Health Department Information System

Helping You...Help Others

Personnel User Manual



The Baldwin Group, Inc.

7550 Lucerne Drive

Suite 306

Cleveland, OH 44130

(440) 891-9100

FAX (440) 891-9458

Copyright © 1996 - 2020

The Baldwin Group, Inc.

ALL RIGHTS RESERVED

HDIS are trademarks of The Baldwin Group, Inc.

No part of this publication may be stored in a retrieval system, transmitted, or reproduced in any way, including but not limited to photocopy, photograph, magnetic, or other record, without the prior agreement and written permission of The Baldwin Group, Inc.

Windows® and MS-DOS® are registered trademarks of Microsoft Corporation.

Other trademarks are owned by their respective companies.

Disclaimer

All data examples containing personal names, company names (or companies), vehicle information, or locations that appear in this guide are fictitious in nature and do not refer to, or portray, in name or substance, any actual names, organizations, entities, or institutions. Any resemblance to any real person (living or dead), organization, entity, or institution is purely coincidental.

Contents

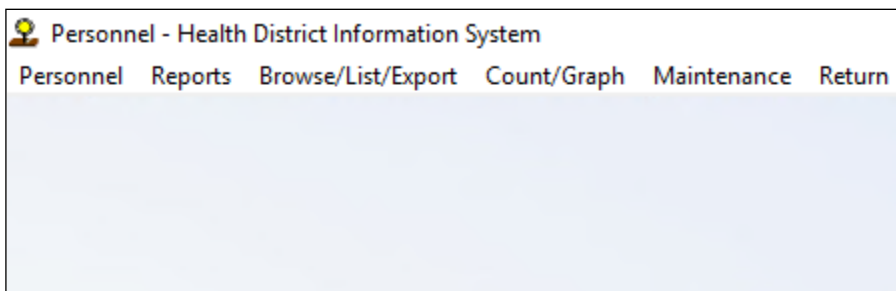
Contents.....	2
Chapter 1: Getting Started	3
Control Files	4
Wages.....	12
Personnel Profile	13
Personnel Profile (Optional – Union).....	19
Race.....	25
Chapter 2: Adding an Employee	26
Info Tab	27
Info - Personal Tab	28
Info – Important Dates.....	29
Info – Automobile	30
Info - Evaluation	31
Emergency Tab.....	32
Ins Tab	33
Salary Tab	34
Evaluation Tab.....	36
Comp/Overtime Tab	37
Sick Tab	39
Vacation Tab	40
Personal	41
Tardy	42
Education	43
Memo.....	44
Personnel Reports.....	45
Browse/List/Export	48
Count/Graph	50

Chapter 1: Getting Started

Once the Personnel Module has been installed, it can be accessed by going to:
Management Services -> Personnel



Once in the module, the tool bar will look like this:



Control Files

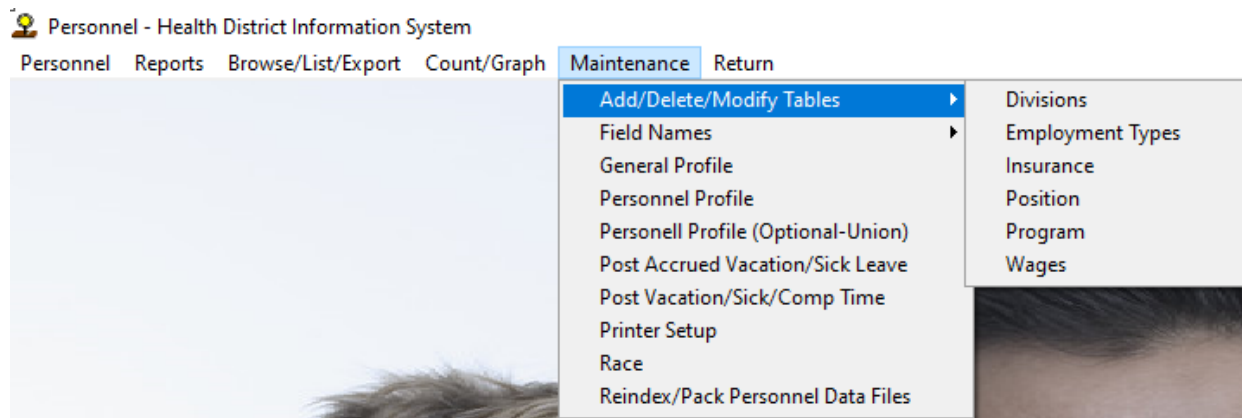
Before using the Personnel module, the control files need to be setup.

Navigate to: **Maintenance** tab

Maintenance	Return
Add/Delete/Modify Tables	▶
Field Names	▶
General Profile	
Personnel Profile	
Personell Profile (Optional-Union)	
Post Accrued Vacation/Sick Leave	
Post Vacation/Sick/Comp Time	
Printer Setup	
Race	
Reindex/Pack Personnel Data Files	

Add/Delete/Modify Tables

This section is used to setup Divisions, Employment Types, Insurance, Position, Program and Wages. From the main Personnel menu bar, go to: Maintenance > Add/Delete/Modify Tables. From there you will select the area you want to work in.



Divisions

Divisions are used to categorize employees that work in different departments. This can be as broad or as detailed as you choose – just make sure it is manageable.

Code	Descript
ADM	ADMINISTRATIVE
CH	COMMUNITY HEALTH
ENV	ENVIRONMENTAL
HC	HEALTH COMMISSIONER
LAB	LAB
LD	LEAD
NUR	NURSING
PLU	PLUMBING
SW	SOLID WASTE
TB	TB
WIC	WIC GRANT
WW	WASTEWATER

Field/Button	Description
Code	Enter a code for the Division.
Descript	Enter a Description for the Division
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new Division. Enter the code and description. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.
Delete Button	To delete a division in the list, select it with your mouse and click the Delete button.
Print Button	To print the Division listing, click the print button. A printer dialog box will be display for you to choose your printer.

Employment Types

Enter the types of employees working at your agency.

Field/Button	Description
Name	Enter a descriptive name for the Employment Type.
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new employment type. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.
Delete Button	To delete an employment type in the list, select it with your mouse and click the Delete button.
Print Button	To print the employment type listing, click the print button. A printer dialog box will be display for you to choose your printer.

Insurance

Information relating to insurance type, carrier, cost, etc. is entered here.

Add/Delete/Modify Insurance

Code	Type	Carrier	Cover	Cost	Emp Cost	Date
BUY-OUT		UNION	EMP/SPOUSE	269.25	0.00	06/01/2003
BUY-OUT		MANAGEMENT	FAMILY	479.95	0.00	01/01/2006
BUY-OUT		UNION	FAMILY	378.15	0.00	03/01/2003
BUY-OUT		UNION	EMP/CHILD	206.78	0.00	06/01/2003
BUY-OUT		UNION	SINGLE	122.50	0.00	01/01/2005
BUY-OUT		MANAGEMENT	SINGLE	225.00	0.00	01/01/2006
BUY-OUT		MANAGEMENT	EMPL/SPOUSE	450.00	0.00	01/01/2006
CO-PAY		MCC / UNION	FAMILY	0.00	39.80	01/01/2004
CO-PAY		MCC / UNION	EMP/SPOUSE	0.00	28.34	01/01/2004
CO-PAY		MCC / UNION	EMPLOYEE	0.00	12.88	01/01/2004
CO-PAY		MCC / MANAGERS	SINGLE	0.00	50.00	01/01/2006
CO-PAY		MCC / MANAGERS	FAMILY	0.00	106.50	01/01/2006
CO-PAY		MCC / UNION	EMPL/SPOUSE	0.00	100.00	01/01/2006
DENTAL&L		FORTIS		0.00	0.00	05/17/2002
DUES		AFSCME	FULL TIME	0.00	31.50	01/01/2006
DUES		AFSCME	PART-TIME	0.00	23.62	01/01/2005
HEALTH		AFSCME	HEALTH CARE	57.00	0.00	06/01/2003
HOSPITAL		MEDICAL MUTUAL	EMP/SPOUSE	999.99	0.00	01/01/2006
HOSPITALIZ		MEDICAL MUTUAL	SINGLE/PLUS	500.00	0.00	01/01/2006
HOSPITALIZ		MEDICAL MUTUAL	FAMILY/PLUS	999.99	0.00	01/01/2006
MGR. LIFE		MEDICAL LIFE	10,000	1.60	0.00	05/17/2002

Close
Add
Delete
Print

Field/Button	Description
Code	Code associate with the insurance.
Type	A two character code of your choosing.
Carrier	Insurance carrier.
Cover	Who the plan covers.
Cost	Cost of the plan.
Emp Cost	Employee's cost for the plan.
Date	Date of plan.
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new Insurance. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.
Delete Button	To delete an insurance in the list, select it with your mouse and click the Delete button.
Print Button	To print the insurance listing, click the print button. A printer dialog box will be display for you to choose your printer.

Programs

If your agency uses programs, these must be entered before the Positions are entered.

Code	Description
1001	ADMINISTRATION
2005	BCMh
2007	IMMUNIZATION CLINIC

Buttons: Close, Add, Delete, Print

Field/Button	Description
Code	Code for the program..
Description	Description of the program.
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new Program. Enter the code and description. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.
Delete Button	To delete a program in the list, select it with your mouse and click the Delete button.
Print Button	To print the program listing, click the print button. A printer dialog box will be display for you to choose your printer.

Positions

This section allows you to document each position in your agency along with the associated approval date, division, program, grade and hours.

App_date	Div	Prog	Grade	Hours	Number	Position	Bar
//					75	ACCT	ACCOUNT CLERK
//					75	ACTV	ACTIVITY COORDINATOR
//					80	ADM	ADMINISTRATIVE ASSISTANT
//					80	ADM SPEC	ADMINISTRATIVE SPECIALIST
//					48	AS&PC	APPLIC SUP & PROC SPEC
//					75	BRST COORD	WIC BRSTFDG COORDINATOR
//					56	CH WORKER	COMM HLTH WORKER
//					75	CLK	CLERK
//					75	DEO	DATA ENTRY OPERATOR
//					80	DEP DIR CH	DEP DIR COMM HEALTH
//					80	DEPDIREH	DEP DIR ENV HLTH
09/19/2004	ENV				80	DIR	DIR. OF COMMUNITY HEALTH
//					75	DRIVER	VAN DRIVER
//					56	EH TECH	ENVIRONMENTAL HLTH TECHNICIAN
//					80	EHDIR	ENV HEALTH DIRECTOR
//					80	GFM	GRANTS FISCAL MANAGER II
//					60	GFMGR.	GRANTS FISCAL MANAGER I
//					80	H/ED	HEALTH EDUCATOR
//					80	HC	HEALTH COMMISSIONER
//					45	HE	HEALTH ED SPECIALIST
//					75	HLTH AST	HEALTH ASSISTANT
//					80	HUB COORD	PATHWAYS HUB COORD
//					56	INF MORT	INFANT MORTALITY COAL COORD
//					75	INTERV SPC	INTERVENTION SPECIALIST
//					75	LAB	LABORATORY ASSISTANT
//					40	LAB CLERK	LABORATORY CLERK
//					80	LAB DIR	DIR OF LABORATORY SERVICES
//					75	LAB TECH	LABORATORY TECHNICIAN
06/01/2012					50	LPN	LICENSED PRACTICAL NURSE
//					75	MED TECH	MEDICAL TECHNICIAN
//					75	NE BF CO	NUTR EDUC/BRSTFDG COORD
//					80	NRSNG DIR	NURSING DIRECTOR
//					75	NUTR COORD	WIC NUTRITION COORDINATOR

Field/Button	Description
App Date	Approval date for this position.
Div	The division this position will be assigned to.
Prog	Program this position will be assigned to.
Grade	Pay grade for this position.
Hours	Number of hours assigned for this position.
Number	Code for this position.
Position	Long name for this position.
Bar	Is this position part of collective bargaining? Y for Yes, N for No.
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new position. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Delete Button	To delete a position in the list, select it with your mouse and click the Delete button.
Print Button	To print the position listing, click the print button. A printer dialog box will be display for you to choose your printer.

Wages

This can be entered by person or by position and indicates union affiliation, wage and PERS affiliation.

Code	Union	Wage	PERS
BROWN	N	31.25	N
DONALDSON	N	27.50	N
HARRIS	N	33.65	N
JONES	N	31.35	N
SMITH	N	22.00	N
U1	Y	10.15	
U1.1	Y	10.45	Y

Field/Button	Description
Code	Name or code for wage.
Union	Is this a union position? Y or N
Wage	Dollar amount for wage.
PERS	Does this contribute to PERS? Y or N
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new wage. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.
Delete Button	To delete a wage in the list, select it with your mouse and click the Delete button.
Print Button	To print the wage listing, click the print button. A printer dialog box will be display for you to choose your printer.

Personnel Profile

From the Maintenance menu, navigate to: Personnel Profile. This section is used for NON-Union employees of your agency.

Personnel Profile

Vacation(FT) Sick Leave(FT) Vacation(PT) Sick Leave(PT) Other

Years of Service		Years of Service (continued)	
Seniority	Anniversary/Calendar	Accrued	
Years <input type="text" value="3"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="3.080000"/>
Years <input type="text" value="9"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="4.616000"/>
Years <input type="text" value="14"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="6.160000"/>
Years <input type="text" value="99"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="7.696000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.000000"/>

Vacation (FT) Tab

Enter the intervals that determine vacation for full time employees here. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)	Vacation(PT)	Sick Leave(PT)	Other
Years of Service		Years of Service (continued)			
Seniority	Anniversary/Calendar	Accrued			
Years <input type="text" value="3"/>	Hours <input type="text" value="1"/>	Hours per pay <input type="text" value="3.0800000"/>			
Years <input type="text" value="9"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="4.6160000"/>			
Years <input type="text" value="14"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="6.1600000"/>			
Years <input type="text" value="99"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="7.6960000"/>			
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="0.0000000"/>			
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="0.0000000"/>			
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="0.0000000"/>			
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="0.0000000"/>			
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="0.0000000"/>			
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay <input type="text" value="0.0000000"/>			

Field/Button	Description
Seniority	The number of years of seniority for this vacation accrual.
Anniversary/Calendar	If this vacation accrual is based on the employee's anniversary/calendar date, enter the number of hours of vacation here.
Accrued	If this vacation accrual is based on hours per pay, enter it here.

Sick Leave (FT) Tab

Enter the intervals that determine sick leave for full time employees here. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)		Vacation(PT)		Sick Leave(PT)		Other	
Years of Service				Years of Service (continued)					
Seniority		Anniversary/Calendar				Accrued			
Years	<input type="text" value="99"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="4.6160000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				

Field/Button	Description
Seniority	The number of years of seniority for this sick leave accrual.
Anniversary/Calendar	If this sick leave accrual is based on the employee's anniversary/calendar date, enter the number of hours of sick leave here.
Accrued	If this sick leave accrual is based on hours per pay, enter it here.

Vacation (PT)

Enter the intervals that determine vacation for part time employees here.

Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)		Vacation(PT)		Sick Leave(PT)		Other	
Years of Service				Years of Service (continued)					
Seniority		Anniversary/Calendar		Accrued					
Years	<input type="text" value="3"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0385000"/>				
Years	<input type="text" value="9"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0577000"/>				
Years	<input type="text" value="15"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0770000"/>				
Years	<input type="text" value="99"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0962000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				

Field/Button	Description
Seniority	The number of years of seniority for this vacation accrual.
Anniversary/Calendar	If this vacation accrual is based on the employee's anniversary/calendar date, enter the number of hours of vacation here.
Accrued	If this vacation accrual is based on hours per pay, enter it here.

Sick Leave (PT)

Enter the intervals that determine sick leave for part time employees here. Use the tab key to navigate through each field.

Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)		Vacation(PT)		Sick Leave(PT)		Other	
Years of Service				Years of Service (continued)					
Seniority		Anniversary/Calendar		Accrued					
Years	<input type="text" value="99"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0577000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				

Field/Button	Description
Seniority	The number of years of seniority for this sick leave accrual.
Anniversary/Calendar	If this sick leave accrual is based on the employee's anniversary/calendar date, enter the number of hours of sick leave here.
Accrued	If this sick leave accrual is based on hours per pay, enter it here.

Other

This screen is for other miscellaneous payroll items. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)	Sick Leave(FT)	Vacation(PT)	Sick Leave(PT)	Other
<div>80 Hours in a pay period</div> <div>1.5 Overtime Rate <input type="checkbox"/> With no other time off</div> <div>10 Min Hours for PT Vacation</div> <div><input type="checkbox"/> Award Sick Time for Comp Earned</div> <div>// Calendar</div> <div><input type="text"/> Medicare</div> <div><input type="text"/> Workers Comp</div> <div><input type="text"/> PERS</div>				

Field/Button	Description
Hours in a pay period	How many hours in a pay period?
Overtime Rate	The rate at which overtime is calculated.
With no other time off	Y for Yes, N for No.
Min Hours for PT Vacation	Minimum amount of hours for part time vacation
Aware Sick Time for Comp Earned	Y for Yes, N for No.
Calendar	
Medicare	The Medicare rate.
Workers Comp	The Workers Comp rate.
PERS	The PERS rate.

Personnel Profile (Optional – Union)

From the Maintenance menu, navigate to: Personnel Profile (Optional – Union). This section is used for UNION employees of your agency.

Personnel Profile (Optional-Union)

Vacation(FT) Sick Leave(FT) Vacation(PT) Sick Leave(PT) Other

Years of Service		Years of Service (continued)	
Seniority	Anniversary/Calendar		Accrued
Years <input type="text" value="3"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="2.8875000"/>
Years <input type="text" value="9"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="4.3275000"/>
Years <input type="text" value="15"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="5.7675000"/>
Years <input type="text" value="99"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="7.2150000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>

Vacation (FT) Tab

Enter the intervals that determine vacation for full time employees here. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)	Vacation(PT)	Sick Leave(PT)	Other
Years of Service		Years of Service (continued)			
Seniority	Anniversary/Calendar	Accrued			
Years <input type="text" value="3"/>	Hours <input type="text" value="1"/>	Hours per pay		<input type="text" value="3.0800000"/>	
Years <input type="text" value="9"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="4.6160000"/>	
Years <input type="text" value="14"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="6.1600000"/>	
Years <input type="text" value="99"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="7.6960000"/>	
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="0.0000000"/>	
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="0.0000000"/>	
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="0.0000000"/>	
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="0.0000000"/>	
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="0.0000000"/>	
Years <input type="text"/>	Hours <input type="text"/>	Hours per pay		<input type="text" value="0.0000000"/>	

Field/Button	Description
Seniority	The number of years of seniority for this vacation accrual.
Anniversary/Calendar	If this vacation accrual is based on the employee's anniversary/calendar date, enter the number of hours of vacation here.
Accrued	If this vacation accrual is based on hours per pay, enter it here.

Sick Leave (FT) Tab

Enter the intervals that determine sick leave for full time employees here. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)		Vacation(PT)		Sick Leave(PT)		Other	
Years of Service				Years of Service (continued)					
Seniority		Anniversary/Calendar		Accrued					
Years	<input type="text" value="99"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="4.6160000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Hours per pay	<input type="text" value="0.0000000"/>				

Field/Button	Description
Seniority	The number of years of seniority for this sick leave accrual.
Anniversary/Calendar	If this sick leave accrual is based on the employee's anniversary/calendar date, enter the number of hours of sick leave here.
Accrued	If this sick leave accrual is based on hours per pay, enter it here.

Vacation (PT)

Enter the intervals that determine vacation for part time employees here. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)		Vacation(PT)		Sick Leave(PT)		Other	
Years of Service					Years of Service (continued)				
Seniority		Anniversary/Calendar		Accrued					
Years	<input type="text" value="3"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0385000"/>				
Years	<input type="text" value="9"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0577000"/>				
Years	<input type="text" value="15"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0770000"/>				
Years	<input type="text" value="99"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0962000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				

Field/Button	Description
Seniority	The number of years of seniority for this vacation accrual.
Anniversary/Calendar	If this vacation accrual is based on the employee's anniversary/calendar date, enter the number of hours of vacation here.
Accrued	If this vacation accrual is based on hours per pay, enter it here.

Sick Leave (PT)

Enter the intervals that determine sick leave for part time employees here. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)		Sick Leave(FT)		Vacation(PT)		Sick Leave(PT)		Other	
Years of Service				Years of Service (continued)					
Seniority		Anniversary/Calendar		Accrued					
Years	<input type="text" value="99"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0577000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				
Years	<input type="text"/>	Hours	<input type="text"/>	Rate per hour	<input type="text" value="0.0000000"/>				

Field/Button	Description
Seniority	The number of years of seniority for this sick leave accrual.
Anniversary/Calendar	If this sick leave accrual is based on the employee's anniversary/calendar date, enter the number of hours of sick leave here.
Accrued	If this sick leave accrual is based on hours per pay, enter it here.

Other

This screen is for other miscellaneous payroll items. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.

Vacation(FT)	Sick Leave(FT)	Vacation(PT)	Sick Leave(PT)	Other
<div>80 Hours in a pay period</div> <div>1.5 Overtime Rate <input type="checkbox"/> With no other time off</div> <div>10 Min Hours for PT Vacation</div> <div><input type="checkbox"/> Award Sick Time for Comp Earned</div> <div>// Calendar</div> <div><input type="text"/> Medicare</div> <div><input type="text"/> Workers Comp</div> <div><input type="text"/> PERS</div>				

Field/Button	Description
Hours in a pay period	How many hours in a pay period?
Overtime Rate	The rate at which overtime is calculated.
With no other time off	Y for Yes, N for No.
Min Hours for PT Vacation	Minimum amount of hours for part time vacation
Aware Sick Time for Comp Earned	Y for Yes, N for No.
Calendar	
Medicare	The Medicare rate.
Workers Comp	The Workers Comp rate.
PERS	The PERS rate.

Race

Used to designate race of your employees.

Add/Delete/Modify Race Table

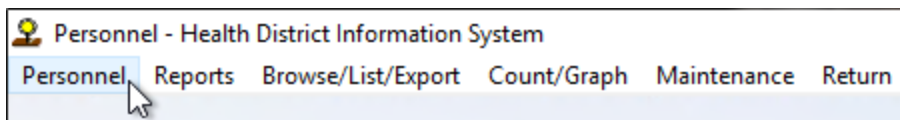
Name
AFRIC.AMER
AM. INDIAN/NATIVE AM.
ARABIC
ASIAN
ASIAN/PACIFIC ISLANDER
BIRACIAL
BLACK
BRAZILIAN
CAUCASIAN
CHINESE

Buttons: Close, Add, Delete, Print

Field/Button	Description
Name	Discription of race.
Close Button	Use the close button to return to the main Personnel module screen
Add Button	Use the Add button to add a new race. Use the tab key to navigate through each field. Information is saved as soon as you leave the field.
Delete Button	To delete a race in the list, select it with your mouse and click the Delete button.
Print Button	To print the race listing, click the print button. A printer dialog box will be display for you to choose your printer.

Chapter 2: Adding an Employee

To add an employee, click on the Personnel tab from the Personnel Module Menu.



This screen will be displayed. Click Add to enter a new employee

A screenshot of a web form titled "Employee -". The form has a tabbed interface with tabs for "Find", "Info", "Emergency", "Ins", "Salary", "Evaluation", "Comp/Overtime", "Sick", "Vacation", "Personal", "Tardy", "Education", and "Memo". The "Find" tab is currently selected. Below the tabs, there is a text input field with the placeholder text "Enter last name, first name middle name(example: SMITH, JOHN JAMES) or ID#". To the right of the input field are two buttons: "Add" and "Close".

Info Tab

The top portion of the info tab contains the name and position information for the employee.

The screenshot shows a web application window titled "Employee -". It has a tabbed interface with tabs: Find, Info (selected), Emergency, Ins, Salary, Evaluation, Comp/Overtime, Sick, Vacation, Personal, Tardy, Education, and Memo. The Info tab contains the following fields:

- Employee ID#: 1001
- First Name: [Text Box]
- Middle Name: [Text Box]
- Last Name: [Text Box]
- Status: [Dropdown]
- Division: [Dropdown]
- Program: [Dropdown]
- Position: [Dropdown]
- Full/Part/Seasonal: [Dropdown]
- Union: [Text Box]
- Policy: [Text Box]

Field/Button	Description
Employee ID#	Prefills with next available employee ID #.
First Name	First name of the employee.
Middle Name	Middle name of the employee.
Last Name	Last name of the employee
Status	Typically A for Active or I for Inactive.
Division	Use the dropdown box to choose the division where the employee will be working.
Program	Use the dropdown box to choose the program this employee should be associated with, if applicable.
Position	Use the dropdown box to choose the position this employee will be filling.
Full/Part/Seasonal	Use the dropdown box to choose what hours the employee will be working.
Union	Typically Y for Yes or N for No.
Policy	
Print Button	Use to print various forms: vacation history, sick history, comp time history and personal history.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Delete Button	Delete this employee's record.
Add Button	Add a new employee.
Modify Button	Modify this employee's record.

Info - Personal Tab

Located at the bottom of the Info Tab, this area is used to record address, phone, date of birth, etc.

Personal		Important Dates		Automobile		Evaluation	
Street		City					
<input type="text"/>		<input type="text"/>					
State	Zip Code	Home Phone	Date of Birth	Sex	Race		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
SSN	Cell Phone		Work Phone		Work Phone Extension		
<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>		

Field/Button	Description
Street	The house number and street name where the employee resides.
City	The city where the employee resides.
State	The state where the employee resides.
Zip Code	The zip code where the employee resides.
Home Phone	Employee's home phone number, if applicable.
Date of Birth	Employee's date of birth.
Sex	Typically M for Male, F for Female
Race	Use the dropdown box to choose the race of the employee.
SSN	The social security number of the employee.
Cell Phone	Cell phone number of the employee.
Work Phone	Work phone number for the employee.
Work Ext.	Work extension for the employee.

Info – Important Dates

Located at the bottom of the Info Tab, this area is used to record start date, termination date and professional licenses and their expiration dates.

Personal	Important Dates	Automobile	Evaluation
Start Date <input type="text" value="//"/>	Adjusted Start Date <input type="text" value="//"/>	Vacation Anniversary Date <input type="text" value="//"/>	Termination Date <input type="text" value="//"/>
Professional License <input type="text"/>	Expiration Date <input type="text" value="//"/>	Degree <input type="text"/>	Seniority in Years(optional) <input type="text"/>
2nd Professional License <input type="text"/>	2nd Expiration Date <input type="text" value="//"/>		
3rd Professional License <input type="text"/>	3rd Expiration Date <input type="text" value="//"/>		

Field/Button	Description
Start Date	The start date of the employee.
Adjusted Start Date	The adjusted start date of the employee, if applicable.
Vacation Anniversary Date	The anniversary date to be used for vacation.
Termination Date	The date employee terminated employment.
Professional License	A professional license the employee holds.
Expiration Date	The expiration date of this professional license.
Degree	Highest degree employee holds.
Seniority in Years	The seniority of the employee (optional).
2 nd Professional License	The second professional license the employee holds.
2 nd Expiration Date	The expiration date of the second professional license.
3 rd Professional License	The third professional license the employee holds.
3 rd Expiration Date	The expiration date of the third professional license.

Info – Automobile

Located at the bottom of the Info Tab, this area is used to record information regarding driver's license auto insurance, parking permit, etc.

Personal	Important Dates	Automobile	Evaluation
Driver's license # <input type="text"/>	Driver's License Expires <input type="text" value="//"/>	Health District Driver <input type="text"/>	Auto Insurance Exp. <input type="text" value="//"/>
Parking Permit #1 <input type="text"/>	Parking Permit #2 <input type="text"/>	Vehicle # <input type="text"/>	Vehicle Phone # <input type="text" value="- - -"/>

Field/Button	Description
Driver's License #	The driver's license number of the employee.
Driver's License Expires	The expiration date of the employee's driver's license.
Health District Driver	Typically Y for Yes or N for No.
Auto Insurance Exp.	Date the employee's automobile insurance expires.
Parking Permit #1	The number of the employee's first parking permit.
Parking Permit #2	The number of the employee's second parking permit.
Vehicle #	The vehicle # typically assigned to the employee.
Vehicle Phone #	The phone number assigned to the vehicle, if applicable.

Info - Evaluation

Located at the bottom of the Info Tab, this area is used to record evaluation information.

Personal	Important Dates	Automobile	Evaluation
<div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="text-align: center;"> <p>Evaluation Form</p> <input type="text"/> </div> <div style="text-align: center;"> <p>Supervisor</p> <input type="text"/> </div> </div>			

Field/Button	Description
Evaluation Form	Name of the form completed for the employee.
Supervisor	Name of supervisor doing the evaluation.

Emergency Tab

This tab lets you record emergency contact information for the employee. Click **Modify** to make changes to this screen.

[illegible]

Field/Button	Description
Name	Name of emergency contact for this employee.
Phone	Phone number for the emergency contact.
Ext	Extension for the emergency contact.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Delete Emergency Contact Button*	RIGHT Click to delete the emergency contact selected.
Add Emergency Contact	Click to add an emergency contact for this employee.
Modify Button	Modify this employee's record.

Ins Tab

This screen provides the means for recording insurance information for the employee. Click Modify to make changes to this screen.

Field/Button	Description
Date	Date of insurance
Code	Use the dropdown box to choose the appropriate code.
Carrier	Will auto complete based on code.
Type	Will auto complete based on code.
Coverage	Will auto complete based on code.
Cost	Will auto complete based on code.
Emp	Will auto complete based on code.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Delete Insurance Button*	RIGHT click to delete insurance selected.
Add Insurance Button	Click to add insurance to this employee.
Modify Button	Modify this employee's record.

Salary Tab

This tab allows you to record payroll information for the employee. Click Modify to make changes to this screen.

[illegible]

Field/Button	Description
Date	Date of this payscale went into effect
Code	Use the dropdown box to choose the appropriate code.
Wage	Will auto complete based on code.
Hours	Will auto complete based on code.
Union	Will auto complete based on code.
PERS	Will auto complete based on code.
Reason	Optional
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Refresh	Use this button to refresh the grid.
Delete Salary History Button*	RIGHT click to delete the salary record selected.
Add Salary History Button	Click to add salary information to this employee.

Modify Button	Modify this employee's record.
---------------	--------------------------------

NOTE: *The Wages X Hours field in the grid calculates as follows: hours X wage X 26 pay periods.*

Evaluation Tab

This tab allows you to record evaluation information for this employee. Click Modify to make changes to this screen.

Field/Button	Description
Date	The date of the evaluation.
Type	Type of evaluation completed.
Form	Form used for evaluation.
Score	Score of evaluation.
Super	Supervisor completing evaluation
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Delete Evaluation Button*	RIGHT click to delete the evaluation record selected.
Add Evaluation Button	Click to add evaluation information to this employee.
Modify Button	Modify this employee's record.

Comp/Overtime Tab

Shows comp and/or overtime hours for the employee. Click Modify to make changes to this screen.

[illegible]

Field/Button	Description
Date	The date of the comp/overtime.
Prog	Program associated to the comp/overtime. <i>Please note... this must be entered exactly as it was entered in the control file.</i>
Type	A one character designation of your choosing.
Hours	Number of hours of comp/overtime worked.
Rate	The rate at which comp/overtime should be calculated. Ex: 1.5
Total	Total hours of comp/overtime for this record.
Bal	Balance of comp/overtime hours. This is cumulative and will be calculated by the system.
Wage	Amount this employee is paid at normal rate. This will usually pre-fill.
Comment	Enter any comment regarding this record.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Refresh	Use this button to refresh the grid.
Delete Overtime Button*	Right click to delete the comp/overtime record selected.

Add Overtime Button	Click to add comp/overtime information to this employee.
Modify Button	Modify this employee's record.

Sick Tab

Shows sick time hours for the employee. Click Modify to make changes to this screen.

Field/Button	Description
Sick Leave	Use this dropdown to choose the type of sick time accrual for this employee.
Date	The date of the sick day.
Time	Number of hours of sick time used.
Bal	Balance of sick time hours. This is cumulative and will be calculated by the system.
Reason	Reason for sick time taken.
Excuse	Typically Y for Yes and N for No.
Comment	Enter any comment regarding this record.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Refresh	Use this button to refresh the grid.
Delete Sick Leave Button*	Right click to delete the sick time record selected.
Add Sick Leave Button	Click to add sick leave information to this employee.
Modify Button	Modify this employee's record.

Vacation Tab

Shows vacation hours for the employee. Click Modify to make changes to this screen.

Field/Button	Description
Vacation Leave	Use this dropdown to choose the type of vacation accrual for this employee.
Date	The date of the vacation day.
Time	Number of hours of vacation time used.
Bal	Balance of vacation hours. This is cumulative and will be calculated by the system.
Reason	Reason for vacation taken.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Refresh	Use this button to refresh the grid.
Delete Vacation Button*	Right click to delete the vacation record selected.
Add Vacation Button	Click to add vacation information to this employee.
Modify Button	Modify this employee's record.

Personal

Show or add personal hours for the employee. Click Modify to make changes to this screen.

[illegible]

Field/Button	Description
Date	The date of the personal day.
Time	Number of hours of personal time used.
Balance	Balance of personal hours. This is cumulative and will be calculated by the system.
Comment	Comment for personal day taken.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Refresh	Use this button to refresh the grid.
Delete Personal Button*	Right click to delete the personal record selected.
Add Personal Button	Click to add personal information to this employee.
Modify Button	Modify this employee's record.

Tardy

Show or add tardy hours for the employee. Click Modify to make changes to this screen.

[illegible]

Field/Button	Description
Date	The date of the tardy day.
Comment	Comment for tardy.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Delete Tardy Button*	Right click to delete the tardy record selected.
Add Tardy Button	Click to add tardy information to this employee.
Modify Button	Modify this employee's record.

Education

Show or add education hours for the employee. Click **Modify** to make changes to this screen.

[illegible]

Field/Button	Description
Date	The date of the education hours.
Hours	Number of hours of education hours.
Cost	Cost of education.
Comment	Comment for education.
Previous Button	Go to the previous employee's record.
Next Button	Go to the next employee's record.
Delete Education Button*	Right click to delete the education record selected.
Add Education Button	Click to add education information to this employee.
Modify Button	Modify this employee's record.

Memo

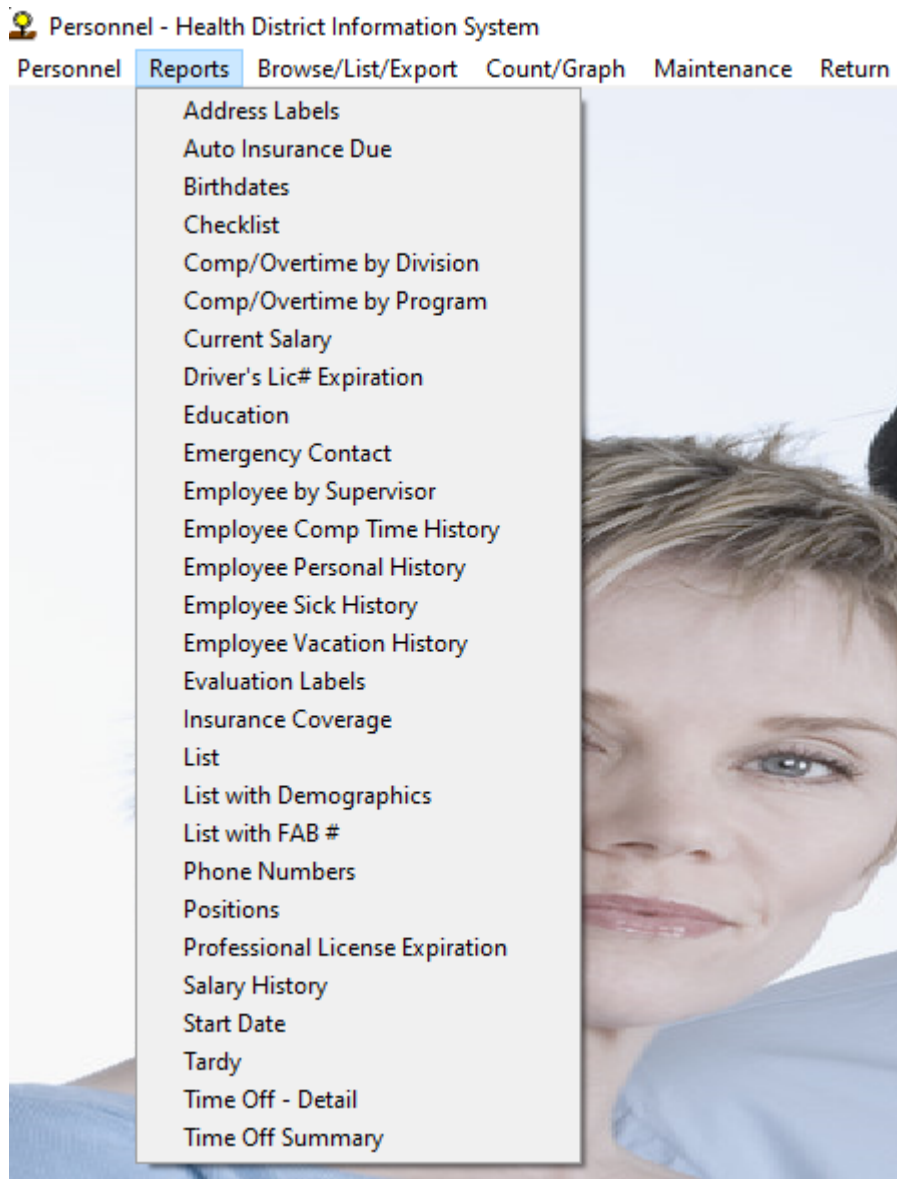
Click Modify to add or edit a Memo. Type text into the memo box field.

Previous and Next buttons navigate between employees.

The screenshot shows a web application window titled "Employee - POTTER, HARDLY T". The window has a tabbed interface with the following tabs: Find, Info, Emergency, Ins, Salary, Evaluation, Compl/Overtime, Sick, Vacation, Personal, Tardy, Education, and Memo. The "Memo" tab is currently selected. Inside the Memo tab, there is a large text area containing the text "This is a memo|". At the bottom right of the window, there are three buttons: "Previous", "Next", and "Modify".

Personnel Reports

Navigate to Reports tab once in Personnel Module.



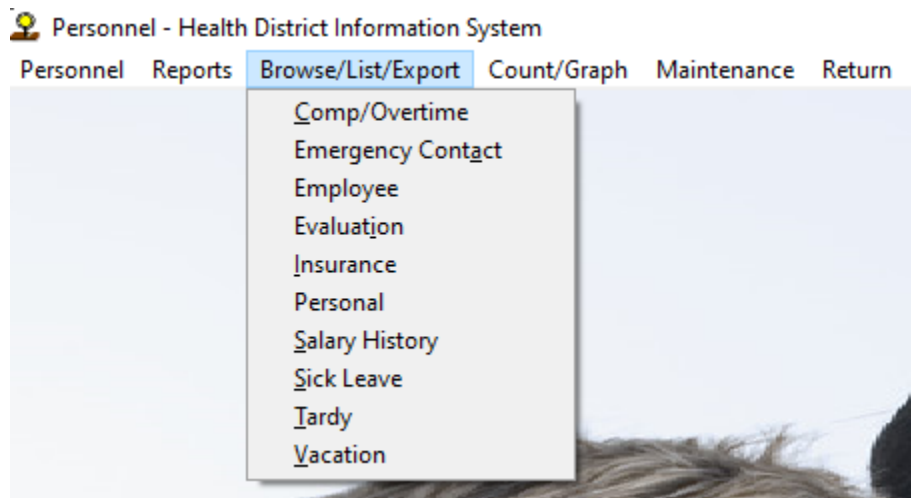
Reports	Description
Address Labels	Creates address labels, by employee
Auto Insurance Due	List, by employee, when their auto insurance is due.
Birthdates	Lists birthdays of employees alphabetically including the program in which they are involved.

Checklist	Alphabetical list of employees and the days the week in a table format.
Comp/Overtime by Division	List of employee comp/overtime by division.
Comp/Overtime by Program	List of employee comp/overtime by program.
Current Salary	List, by employee, with their current salary.
Driver's Lic. # Expiration	Lists the date the employee's driver's license expires.
Education	List, by employee, with their education.
Emergency Contact	Alphabetical list, by employee, of emergency contact names and phone numbers.
Employee by Supervisor	Alphabetical list of employees by supervisor.
Employee Comp Time History	List, by employee, the date of the comp time, if it is accrued, paid or used, the program the employee is assigned to, any pertinent comments, the amount of actual time, the rate the employee is reimbursed, the amount of time the final calculations are based on and the balance of available time.
Employee Personal History	List, by employee, the date the time was taken or accrued, the number of hours, and the available balance.
Employee Sick History	List, by employee, the date sick time was taken, the reason it was taken, was it excused, the amount of time taken, and the available balance.
Employee Vacation History	List, by employee, the date of the vacation time, if it is accrued or used, any pertinent comments, amount of time, and the available balance.
Evaluation Labels	Creates labels that may be affixed to evaluation forms.
Insurance Coverage	List, by employee, of their insurance coverage.
List	Alphabetical list, by employee including occupation information
List with Demographics	Alphabetical list, by employee with demographics.
Phone Numbers	List, by employee, with all phone numbers.
Positions	List, by employee, with position and description.
Professional Lic. Expiration	Lists of the date the employee's professional license expires.
Salary History	Provides salary history by employee.
Start Date	List, by employee, with their start date.
Tardy	List, by employee, who have recorded tardy instances.
Time Off – Detail	List, by employee (detailed), with balance of vacation time, sick leave, comp time, and personal time.
Time Off – Summary	List, by employee (summary), with balance of vacation time, sick leave, comp time, and personal time.
Code	Enter the code
Program	Enter the program

Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

Browse/List/Export

Click the Browse/List/Export tab to show the drop-down list of category options.



Select a category to Browse/List/Export

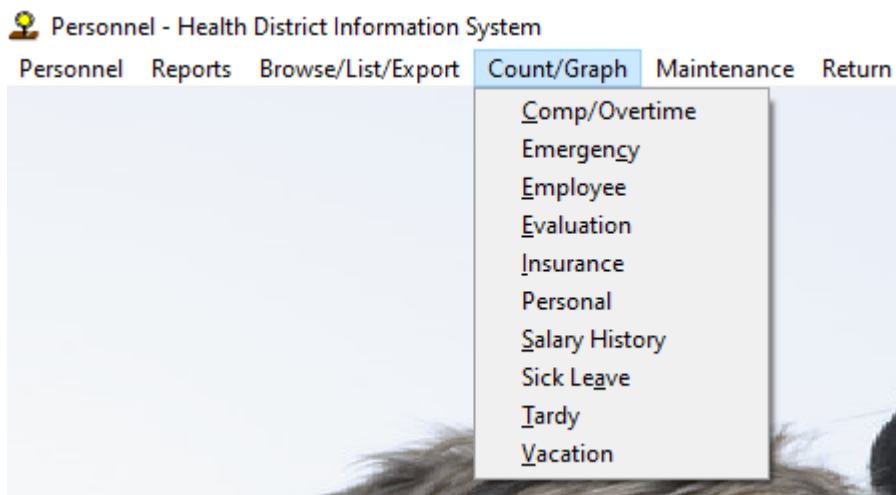
Use Filters at the bottom right side of the screen to sort the results to export.

Clicking the Filters button will open a new window to further constrain the Browse/List/Export results.

The screenshot displays a software interface for exporting data. It is divided into three main sections: 'Output to:', 'Output data:', and 'Sort by: (3 Max)'. The 'Output to:' section has radio buttons for 'Screen' (selected), 'Printer', 'DBF file', 'SDF file', 'Delimited file', and 'XLS File'. Below these is a text box containing 'C:\HDIS\EXPORT\OVERTIME' and a 'Browse' button. The 'Output data:' section has radio buttons for 'All Fields' (selected) and 'Selected fields only'. The 'Sort by: (3 Max)' section features two list boxes with arrows between them. The right list box contains the following items: Balance, Client, Date, Hours, Hours X Rate, Medicare, PERS, Program, Rate, Type, Wage, and Worker's Comp. On the right side of the interface, there are four buttons: 'OK', 'Close', 'Filters', and 'Font'.

Count/Graph

Click the Count/Graph to open the categories of options.



Selecting a category will open a new options menu.

Use Filters at the bottom right side of the screen to sort the results to export.

Clicking the Filters button will open a new window to further constrain the Count/Graph results.

Overtime - Count/Graph

Report Title
Balance

Legend Title

Balance
Client
Date
Hours
Hours X Rate
Medicare
PERS
Program
Rate
Type
Wage
Worker's Comp

Output to:
☒ Screen ☐ Print
☐ DBF file ☐ SDF file ☐ Delimited file
 C:\HDIS\EXPORT **Browse**

Output:
☐ top ten ☒ all

Type
☒ count ☐ Totals
☐ pie graph ☐ pie graph (full page)
☐ bar graph ☐ bar graph (full page)

Sort by
☒ High to low
☐ Low to high
☐ by data

Footer

Filters Close OK