

CREATE EMPLOYEES

Let's talk about how to create a new employee. This is another option available to both the Manager and the Super Manager. *As an aside, your company may decide that only one person can create employees, simply to keep it consistent.*

Log in and select **CREATE EMPLOYEE** from the options.

Super Manager Menu

Welcome Jim Smith! What would you like to do today?

CREATE...	VIEW...
Job Description	Job Descriptions
Employee	Employees
Manager	Managers

Manager Menu

- Create Job Description
- View Job Descriptions
- Create Employee
- View Pending Documents
- Open File Library
- Open Interviewing Menu
- Exit EmTrak & Close

Now, let's examine the fields. There is a place to put their

Return to Menu

Employee Name <input style="width: 95%;" type="text"/>	Job Title <input style="width: 95%;" type="text" value="▼"/>
Department <input style="width: 95%;" type="text" value="▼"/>	Manager <input style="width: 95%;" type="text" value="▼"/>
Employee ID <input style="width: 95%;" type="text"/>	Viewing Manager <input style="width: 95%;" type="text" value="▼"/>
Employee Email Address <input style="background-color: yellow;" type="text"/>	
Show Bonus Items <small>Should bonus items be shown on documents?</small> <input style="width: 95%;" type="text" value="▼"/>	Show Merit Increase Item <small>Should the merit increase item be shown on annual review?</small> <input style="width: 95%;" type="text" value="▼"/>
Hire or Anniversary Date <small>What is the hire or anniversary date of this employee?</small> <input style="width: 95%;" type="text" value=""/>	Employee Status <small>What is the status of this employee?</small> <input style="width: 95%;" type="text" value="▼"/>
Employee Reminder <small>Employee item requiring reminder (e.g., license renewal).</small> <input style="width: 95%;" type="text"/>	Due Date <small>Enter the date that this employee item is due.</small> <input style="width: 95%;" type="text" value=""/>
Employee Reminder <input style="width: 95%;" type="text"/>	Due Date <input style="width: 95%;" type="text" value=""/>

- **Employee Name** - (simply put first and last name, no need for commas, etc.)
- **Job Title** - Choose their job title - open the pull down menu – this will list every job description that has been created for the company. Be reminded that I recommend the name of the department at the front of every job description, just as a short cut.

- **Department** - Choose their Department (again, your company creates the names of the departments). Make certain the name of the department you put them in matches the department that the job description has been placed in.
- **Manager** - Choose their Manager



IMPORTANT NOTE: The department in which you put the job description and the department you assign the employee to have to match. For example, let's say there is an Administrative Assistant job that was created for marketing. If this person was administrative assistant for your CEO, you would need to create an Administrative Assistant job for that department. If the departments do not match, you will see this error when you try to create/open a document

The job description was not found for this employee.

A job description is required to create an annual review self-evaluation.

- **Employee Id** - Put in an employee ID – a number of your company's choosing.
- **Viewing Manager** - We created the feature of a Viewing Manager primarily for companies with branches where the manager of the branch may not evaluate that salesperson in the branch but needs to be able to view the evaluations, etc. A viewing manager has access to that employee's records, but is not the supervising manager.

Another way it is used is this. Let's say you have two primary departments in your company – finance and operations. You want your Director of Finance to be able to see all billing, CSR, purchasing and accounting employees. You want your Director of Operations to be able to see all drivers, service, maintenance and warehouse. This allows you to set up that tiered approach.

- **Employee Email Address** – this address is for the EMPLOYEE REMINDERS we discuss in a moment – it is to this email that the reminders will go.

- **Show Bonus Items** – if you want the ability to include bonus tasks in their annual review and any periodic reviews you do, then select yes. If you choose YES on SHOW BONUS ITEMS, there will be this special box for bonus goals on the annual review and progress towards that task on their periodic evaluation. The default setting is No, and you might consider the idea that research suggests that you may not want to tie bonuses to evaluations, instead keep them separate. (see below)
- **Show Merit Increase Item** – again, the default setting is No. This means that on the annual review, there will be no field for merit increase. If you check YES, then the annual review will show whether or not you recommend a merit increase. (see below)

Bonus Performance Tasks	
Task	Date to Complete
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Bonus Recommended
Does this employee's job performance warrant a bonus?

Merit Increase Recommended
Does this employee's job performance warrant a merit increase?

- **Hire Or Anniversary Date** - Put in either their anniversary date (the date they were hired) or today's hire date. These dates will impact the timing of future evaluations, that's why this information is important.
- **Employee Reminder** – there are actually four of these available. Does your employee have a license that needs to be renewed, or CEUs that he/she needs to submit. These reminders are there so that you can put in this information – based on this the employee and his/her manager will get a reminder 30 days before this event that this is due.
- **Additional Employee Information** - Finally, the empty field below is a simple way to put information that your company may choose to store: vacation days, personal info, etc. We'll leave it blank for this demo.

Additional Employee Information
Enter any additional information about this employee in the space provided.

◀ Previous Next ▶

Here Is How It Looks In Action

We will input the **EMPLOYEE NAME**, select a **JOB TITLE** by pulling up the drop down box for Job Title.

Employee Name John Smith	Job Title ▼
Department - Select a Department - ▼	AA HR Big Job Description Billing - Collections and Denials Billing Team Leader CSR 1 CSR 4 - office Supplies CSR Team Leader customer service rep Driver Tech 1 Reimbursement Specialist Respiratory Therapist - Venk RTS Sales - Administrative Assistant
Employee ID <input type="text"/>	
Employee Email Address <input type="text"/>	
Show Bonus Items <i>Should bonus items be shown on documents?</i> No ▼	<i>annual review?</i>
Hire or Anniversary Date	Employee Status

Next, pull up the drop down box for **DEPARTMENT** and choose the Department. There will also be a drop down box for **MANAGER**. From that, select which **MANAGER** John reports to. Your company selects what it uses as the **EMPLOYEE ID** (we recommend the last 4 digits of the social security number). The **EMPLOYEE EMAIL ADDRESS** is necessary for the reminders we will discuss in a moment. The **VIEWING MANAGER**, if one exists, would be someone who needs to be able to review John's records but doesn't do John's evaluations, etc.

Department - Select a Department - ▼ - Select a Department - Administration Billing Clinical/Respiratory Customer Service Drivers Finance Human Resources IT Sales Pharmacy Service	Manager - Select a Manager - ▼ - Select a Manager - Ann Wilson Clark Gable Jane Prince Jones Jim Adams Jim Smith Myrna Loy Pam Jones Paul Thomas Phil Stone RT Person Steve Olsen Ted Long Tom Wilson Willy Loman	Employee ID 4567	Viewing Manager - Select a Viewing Manager - Ann Wilson Clark Gable Jane Prince Jones Jim Adams Jim Smith Myrna Loy Pam Jones Paul Thomas Phil Stone RT Person Steve Olsen Ted Long Tom Wilson Willy Loman
		Employee Email Address jsmith@medgroup.com	
	Due Date		

Remember that on Bonus and Merit, the default is NO. We will input his **HIRE OR ANNIVERSARY DATE**. His **EMPLOYEE STATUS** is Active.

Show Bonus Items <i>Should bonus items be shown on documents?</i> No ▼	Show Merit Increase Item <i>Should the merit increase item be shown on annual review?</i> No ▼
Hire or Anniversary Date <i>What is the hire or anniversary date of this employee?</i> 10/07/03	Employee Status <i>What is the status of this employee?</i> Active ▼

John, in this case, is one of our drivers. We note that his Commercial Driver's License comes due again on June 14, 2007. This way both he and his manager will get a reminder 30 days before that date that his license is coming due.

Employee Reminder <i>Employee item requiring reminder (e.g., license renewal).</i>	Due Date <i>Enter the date that this employee item is due.</i>
CDL License Renewal	
Employee Reminder	
Employee Reminder	
Employee Reminder	
Additional Employee Information <i>Enter any additional information about this employee</i>	

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S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Today

Perhaps you choose to put John's birthday, wife and child, insurance info in the Additional Employee Information, simply as a simple place to retain that info.

Additional Employee Information <i>Enter any additional information about this employee in the space provided.</i>
Birthday 7/9/55. Wife Sharon, daughter Jane, 5. Full Medical, additional plans through AFLAC.

NEXT, verify the info, the new employee is in! *Note you can change/update the information at any time by clicking on Edit Employee on the upper left hand side.*

Edit Employee	Return to Menu
Employee Name John Smith	Job Title Driver Tech 1
View Employee Log	
Date	Last 5 Log Entries (first 85 characters)
CREATE...	VIEW...
Training Document	Training Documents
Coaching Document	Coaching Documents
Applause Document	Applause Documents
Disciplinary Action	Disciplinary Actions
Periodic Evaluation	Periodic Evaluations
Annual Review Self-Evaluation	Annual Reviews
Annual Review	Introductory Evaluation
Introductory Evaluation	Job Description
Department Drivers	Manager Tom Wilson

EDITING AN EMPLOYEE

As a Super Manager, click on VIEW EMPLOYEES and the list of all employees will come up. As a Manager, simply enter your Manager's Page for a listing of all of your employees to whom you have access.

VIEW...

- Job Descriptions**
- Employees**
- Managers**
- Introductory Evaluations**
- Training Documents**
- Coaching Documents**
- Applause Documents**
- Disciplinary Actions**
- Periodic Evaluations**
- Annual Reviews**

MED Supply Company

Click on an employee to open for viewing and editing.

Del?	Employee Name	Employee ID	Job Description	Hire/Eval Date	Status
	Billy Johnson	8998	Billing - Collections and Denials	11/09/2005	Active
	Dolly Madison	4321	Respiratory Therapist - Vent	10/7/2005	Active
	Doug Doug	6489	rehab tech 1	11/17/2006	Active
	Gary Weems	1212	AA HR	10/02/2006	Active
	Glenn Close	6666	CSR 1	10/7/2005	Active
	Han Dee Mann	9834	Administrative Assistant- Service	10/07/2005	Active
	James Doe	9040	customer service rep	10/10/2006	Active
	Jane RT	1569	Respiratory Therapist - Vent	10/05/2006	Active
	Jason Wainright	125	CSR 1	1/30/2006	Active
	JAYCEE MOORE	4506	RESPIRATORY SERVICE TECH 1	03/17/2006	Active
	Jim Smith	1111		10/07/2005	Active

Click on the name of the employee you want to edit and their page comes up.

Welcome Pam Jones! What would you like to do today?

Employee Name	Employee ID	Job Description	Hire Date	Status
Mary Jones	9236495151	CSR/Reimbursement Specialist	11/30/2005	Active
Pam Tom	9872	Billing - Collections and Denials	11/20/2006	Active
Tony Soprano	4444	Billing - Collections and Denials	10/7/2005	Active
Uma Thurman	976431	Reimbursement Specialist	11/14/2006	Active
William Shatner	676869	Reimbursement Specialist	11/14/2006	Active

Click on Edit Employee and their page comes up with all of the current information in it, but ready to make changes.

Edit Employee
Return to Menu

<u>Employee Name</u> John Smith	<u>Job Title</u> Driver Tech 1
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View Employee Log

Date	Last 5 Log Entries (first 85 characters)

CREATE...


- [Training Document](#)
- [Coaching Document](#)
- [Applause Document](#)
- [Disciplinary Action](#)
- [Periodic Evaluation](#)
- [Annual Review Self-Evaluation](#)
- [Annual Review](#)
- [Introductory Evaluation](#)

VIEW...

- [Training Documents](#)
- [Coaching Documents](#)
- [Applause Documents](#)
- [Disciplinary Actions](#)
- [Periodic Evaluations](#)
- [Annual Reviews](#)
- [Introductory Evaluation](#)
- [Job Description](#)

<u>Department</u> Drivers	<u>Manager</u> Tom Wilson
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Now that the fields are open, you can make any changes you need. Perhaps this employee needs a new job description, has been moved to a new department or has a new manager. Make your changes and click the NEXT button at the bottom of the page. You're set.

Employee Name John Smith	Job Title Driver Tech 1
View Employee Log	
Date	Last 5 Log Entries (first 85 characters) 
CREATE...	VIEW...
Training Document	Training Documents
Coaching Document	Coaching Documents
Applause Document	Applause Documents
Disciplinary Action	Disciplinary Actions
Periodic Evaluation	Periodic Evaluations
Annual Review Self-Evaluation	Annual Reviews
Annual Review	Introductory Evaluation
Introductory Evaluation	Job Description
Department Drivers	Manager Tom Wilson
Employee ID 4569	Viewing Manager

