



Adding a New Employee

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National Capabilities

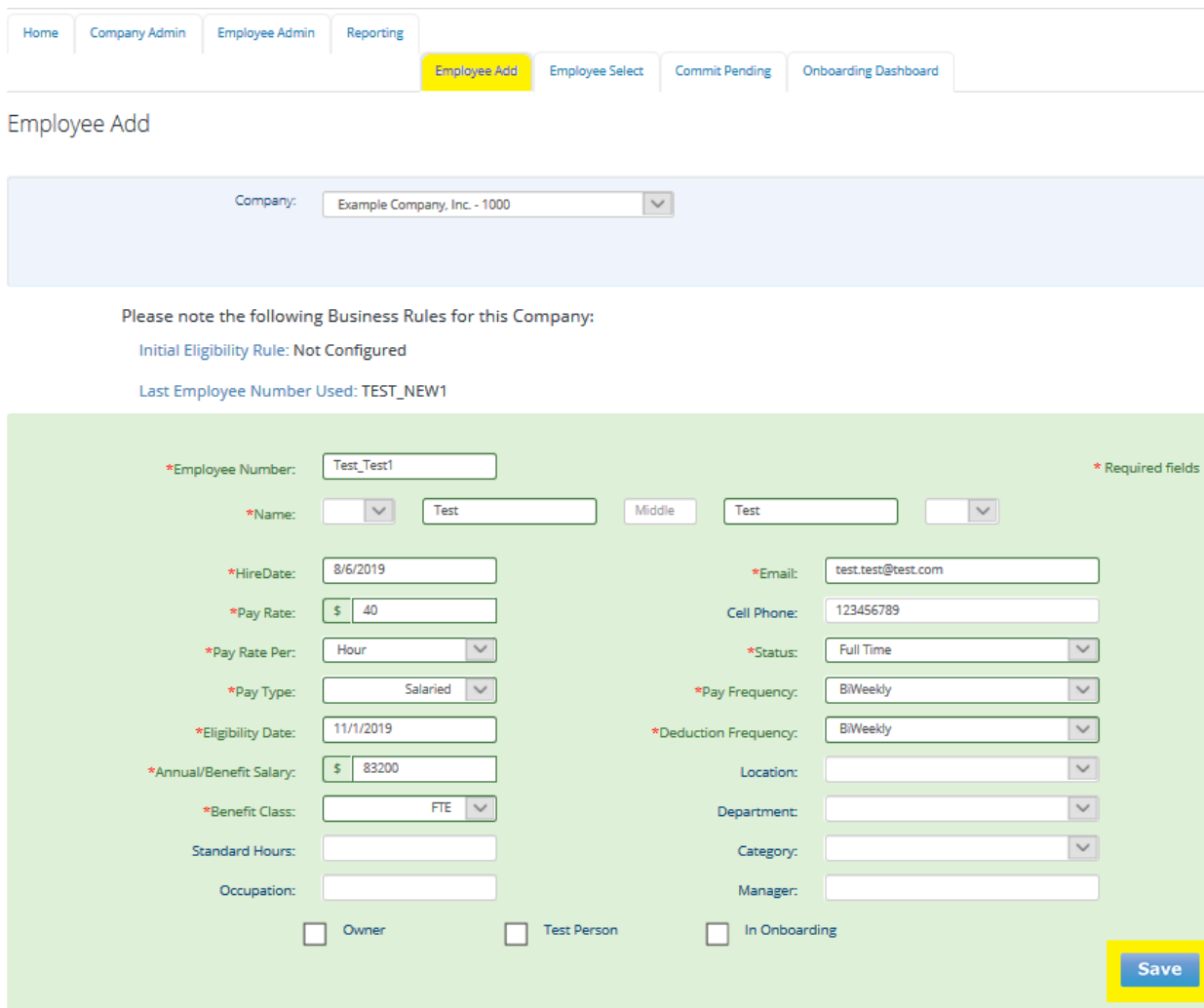
Employee Add – Manual

NOTE: This method of entry is only necessary if there is *NOT* a **Demographic Interface** from the client to HR Ease or if you are adding a person for the purposes or **Onboarding**.

1. From the main Administrator Dashboard page, click on the Tab called “Employee Admin”



2. Click on the “Employee Add” tab. Enter data. Fields labeled in green are required. Then click “Save”.



The screenshot shows the 'Employee Add' form. The 'Employee Add' tab is highlighted in yellow. The form is titled 'Employee Add' and includes a dropdown menu for 'Company' set to 'Example Company, Inc. - 1000'. Below this, there is a note about Business Rules for this Company: 'Initial Eligibility Rule: Not Configured' and 'Last Employee Number Used: TEST_NEW1'. The form fields are as follows:

- *Employee Number: Test_Test1
- *Name: Test (Last Name), Test (First Name), Middle (Middle Name)
- *HireDate: 8/6/2019
- *Pay Rate: \$ 40
- *Pay Rate Per: Hour
- *Pay Type: Salaried
- *Eligibility Date: 11/1/2019
- *Annual/Benefit Salary: \$ 83200
- *Benefit Class: FTE
- Standard Hours: (empty)
- Occupation: (empty)
- *Email: test.test@test.com
- Cell Phone: 123456789
- *Status: Full Time
- *Pay Frequency: BiWeekly
- *Deduction Frequency: BiWeekly
- Location: (empty)
- Department: (empty)
- Category: (empty)
- Manager: (empty)

At the bottom of the form, there are three checkboxes: 'Owner', 'Test Person', and 'In Onboarding'. A yellow 'Save' button is located at the bottom right of the form.

3. IMPORTANT NOTE: If your employee will be in **Onboarding**, check the “In Onboarding” box and the appropriate onboarding screens will be included in their custom data path. Additionally, if the box by “Test Person” is checked, the information entered will not be transferred to the Carriers and no charges will be incurred.

Company:

Please note the following Business Rules for this Company:

Initial Eligibility Rule: Not Configured

Last Employee Number Used: TEST_NEW1

*Employee Number: * Required fields

*Name: Middle

*HireDate: *Email:

*Pay Rate: Cell Phone:

*Pay Rate Per: *Status:

*Pay Type: *Pay Frequency:

*Eligibility Date: *Deduction Frequency:

*Annual/Benefit Salary: Location:

*Benefit Class: Department:

Standard Hours: Category:

Occupation: Manager:

Owner
 Test Person
 In Onboarding

4. After successfully adding employee, you will briefly see a screen with a large check mark and the message “Employee Added”. You will automatically be transferred to the next page.

5. You can create a custom path for each employee by checking/unchecking the box under “Assigned?” to add or remove data collection screens. After making your screen selections, click “Next”.

Employee WebConfig
User Agreement
Employee Welcome
Profile
Relationships
Benefit Info
Benefit Documents
Current Benefits
Declare Event
Enroll

Pending Benefits
Benefit Acceptance

Employee WebConfig

Employee Shadow: Test Test

Screen Category	Long Description	Screen Path	Assigned?
Employee	User Agreement	User Agreement	<input checked="" type="checkbox"/>
Employee	Employee Welcome Page	Employee Welcome	<input checked="" type="checkbox"/>
Employee	Employee Profile for Employee Maintenance	Profile	<input checked="" type="checkbox"/>
Employee	Employee Relationship Page	Relationships	<input checked="" type="checkbox"/>
Onboarding	Employee Direct Deposit Page	Direct Deposit	<input type="checkbox"/>
Onboarding	Employee I9 Page	I9	<input type="checkbox"/>
Onboarding	Employee Federal W4	W4	<input type="checkbox"/>
Onboarding	Employee Additional Info	Additional Info	<input type="checkbox"/>
Benefits	Employee Benefits Learn Main Page	Benefit Info	<input checked="" type="checkbox"/>
Benefits	Employee Links to Benefit Documents and Links by PlanType	Benefit Documents	<input checked="" type="checkbox"/>
Benefits	Employee Current Benefit Summary Page with History	Current Benefits	<input checked="" type="checkbox"/>
Benefits	Employee Event Declaration Page	Declare Event	<input checked="" type="checkbox"/>
Benefits	Employee Election Pages	Enroll	<input checked="" type="checkbox"/>
Benefits	Employee Pending Benefit Summary Page	Pending Benefits	<input checked="" type="checkbox"/>
Benefits	Employee Benefit Acceptance Page	Benefit Acceptance	<input checked="" type="checkbox"/>



6. You will now be at the Employee “Profile” page. If the employee will NOT be in **Onboarding**, you can add/update their information by selecting “Edit” in any of the Profile Sections.

- [Employee WebConfig](#)
 - [User Agreement](#)
 - [Employee Welcome](#)
 - [Profile](#)
 - [Relationships](#)
 - [Benefit Info](#)
 - [Benefit Documents](#)
 - [Current Benefits](#)
 - [Declare Event](#)
 - [Enroll](#)
- [Pending Benefits](#)
 - [Benefit Acceptance](#)



Employee Shadow: Test Test

click to update picture



Contact Information:

Name and Address

Test Test

USA

Phone

Home:

Work:

Mobile:

* Primary Phone

Email

test.test@test.com

* Primary Email

Edit

Demographic Information:

SSN:

Date of Birth:

Employee Number: Test_Test7

Education Level:

Gender:

Marital Status:

Tobacco User: False

Language:

Ethnicity:

Military Status:

Edit

Additional HR Demographic Information:

[Reset Security](#)

Original Hire Date: 08/06/2019

Latest Hire Date:

Status: Full Time

Benefit Class Effective Date:

Benefit Class: FTE

Termination Date:

Termination Reason:

Length of Cobra:

Original Eligibility Date: 11/01/2019

Latest Eligibility Date:

Pay Type: Salaried

Pay Rate: \$40.00 **Per:** Hour

Benefit Salary: \$83,200.00

Pay Frequency: BiWeekly

Deduction Frequency: BiWeekly

Category:

Manager:

Occupation:

Department:

Division:

Standard Hours: 0.00

Owner: False

In Onboarding: False

Edit


7. After clicking “Edit”, you can update their information and then click “Save”.

Note: After opening a “Profile” section, you will be required to complete all fields marked with an * in order to successfully save your information. Also, you are required to complete the “Demographic Information” fields of SSN, Gender, Date of Birth, and Employee Number before you can save updated Profile information and continue.

“Contact Information” Screen Example

Employee WebConfig | User Agreement | Employee Welcome | **Profile** | Relationships | Benefit Info | Benefit Documents | Current Benefits | Declare Event | Enroll

Pending Benefits | Benefit Acceptance

 Employee Shadow: Test Test

[click to update picture](#)

[Click here to update profile picture](#) * Required fields

Prefix: Middle:

*Address:

*City:

*State:

*Country:

*Zip:

Click radio button to choose Primary contact number

Phone: Mobile Phone Home Phone Work Phone

Click radio button to choose Primary Email

*Email: test.test@test.com Email2

“Demographic Information” Screen Example

- Employee WebConfig
 - User Agreement
 - Employee Welcome
 - Profile**
 - Relationships
 - Benefit Info
 - Benefit Documents
 - Current Benefits
 - Declare Event
 - Enroll
- Pending Benefits
 - Benefit Acceptance



Employee Shadow: Test Test

click to update picture

*SSN:	<input type="text" value="123-45-6789"/>	*Gender:	<input type="text" value="Male"/>	Language:	<input type="text"/>
*Birth_Date:	<input type="text" value="01/01/1999"/>	Marital_Status:	<input type="text"/>	Ethnicity:	<input type="text"/>
*Employee_Number:	<input type="text" value="Test_Test7"/>	Military:	<input type="text"/>	Education:	<input type="text" value="Other"/>

Tobacco User

Save


Cancel

8. After each section's changes are saved, you will be brought back to the "Profile" page where you can continue to add/update by clicking "Edit". If finished, click "Next" to continue updating employee.


Employee WebConfig
User Agreement
Employee Welcome
Profile
Relationships
Benefit Info
Benefit Documents
Current Benefits
Declare Event
Enroll

Pending Benefits
Benefit Acceptance

Employee Shadow: Test Test



click to update picture



Contact Information:

<p>Name and Address Test Test 123 Main Street Anytown FL 12345-6789 USA</p>	<p>Phone Home: Work: Mobile: * Primary Phone</p>	<p>Email test.test@test.com * Primary Email</p>
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Edit

Demographic Information:

<p>SSN: 111-77-6857 Date of Birth: 01/01/1999 Employee Number: Test_Test7 Education Level: Other</p>	<p>Gender: Male Marital Status: Tobacco User: False</p>	<p>Language: Ethnicity: Military Status:</p>
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Edit

Additional HR Demographic Information: Reset Security

<p>Original Hire Date: 08/06/2019 Latest Hire Date: Status: Full Time Benefit Class Effective Date: Benefit Class: FTE Termination Date: Termination Reason: Length of Cobra:</p>	<p>Original Eligibility Date: 11/01/2019 Latest Eligibility Date: Pay Type: Salaried Pay Rate: \$40.00 Per: Hour Benefit Salary: \$83,200.00 Pay Frequency: BiWeekly Deduction Frequency: BiWeekly Category:</p>	<p>Manager: Occupation: Department: Division: Standard Hours: 0.00 Owner: False In Onboarding: False</p>
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Edit



To schedule a live demo:

Please call 800.400.1968 or email us at info@abelhr.com
and a member of our staff will be glad to assist you.