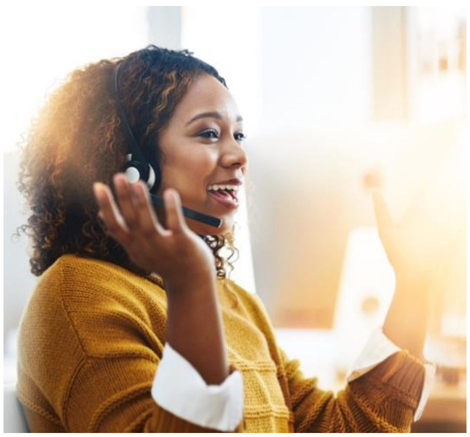
Paycor HR

Client Learning | Participant Guide

Paycor

You want to make a difference. So do we.™



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Welcome

We are excited to have you in the Paycor HR class today. A few items to keep in mind throughout the training:

- Questions can also be typed in the chat window.
- The demo environment may differ from your system, but the functionality is the same.

NOTES:

Agenda

- Welcome
- Housekeeping
- Overview
- Company Level View and Editing
- Employee Level View and Editing
- Summary and Close

Company Level View and Editing: Jobs

Menu Selections to Access: Company > Configure Company > Jobs

To add a **Job**:

1. Click the **+ Add Job** button.
2. Enter **Job Title** and **Job Code**.
3. Select **Job Category**.
4. Click **Save**.
5. Optionally on Job Details section could include:
    a. Pay Range Code (see note below*)
    b. Assign Courses
    c. Employment Description
    d. Education Requirements

**Job/Pay Range Metrics – by typing Pay Ranges to a Job we have the ability to view pay metrics:*

- Compa-Ratio: A measurement of an employee's annual salary compared to the midpoint of their position's annual pay range. This shows how the annual pay for your employee aligns with the midpoint of others in your same geographic area who are performing the same or a similar job.

- Range Penetration: A comparison between an employee's annual salary and their position's complete pay range (versus just the midpoint).

Menu Selections to Access: Employees > Manage Employees

To assign a **Job** to an **Employee**:

1. Select **Employee.**
2. Select **Company Folder.**
3. Select **Position**.
4. Select **Job Title** from drop-down.
5. Click **Save**. (prompted for Effective Date and Change Reason)

NOTES:

Ccompany Level View and Editing: Workflow Configuration

Menu Selections to Access: Company > Configure Company > Workflow Configuration

To activate and set up approvals/notifications for a **Workflow:**

1. Select a pre-configured **workflow**.
2. Click the toggle button to the **"ON"** setting.
3. **Approvals** tab, select a role or employee to approve the Workflow.
    a. Select Email Notifications Checkbox if you would like the approver to receive an email alerting them of the workflow.
    b. Use the arrow icons to change the order of approvers.
4. **Notifications** tab, select a role or employee to receive a notification in the Tasks and Notifications section when workflow has been approved.
5. Click **Save**.
6. Optionally: + New Route – to add different workflow configurations for different departments and/or locations.

Ccompany Level View and Editing: Schedule Reminders

Menu Selections to Access: Company > Configure Company > Scheduled Reminders

To activate a **Scheduled Reminder**:

1. Select **Event** to schedule.
2. Click the **"Active"** box.
3. Click **Save**.

Ccompany Level View and Editing: Custom Fields

Menu Selections to Access: Company > Configure Company > Custom Fields

To add a **Custom Field**:

1. Click **+ Add Custom Field**.
2. Enter Field Name.
3. Select Field Type.
4. Click **Save**.

NOTES:

Employee Level View and Editing: Certifications

Menu Selections to Access: Employees > Manage Employees

To add a **Certification**:

1. Select **Employee.**
2. Select **Employee Folder.**
3. Click **Certifications**.
4. Click **+ Add Certification**.
5. Type or select from the drop-down the Certification type.
6. Enter a Certification Number if applicable.
7. Type or select from the drop-down the Organization.
8. Enter the Effective and Expiration Date.
9. Click **Save**.

NOTES:

Employee Level View and Editing: Courses

Menu Selections to Access: Employees > Manage Employees

To add a **Course**:

1. Select **Employee**.
2. Select **Employee Folder**.
3. Click **Courses**.
4. Click **+ Add Completed Course**.
5. Type or select from the drop-down the Course Name.
6. Enter the Location and Number of Hours.
7. Enter Completion Date.
8. Click the **Track-Progress** checkbox to allow the course to be tracked as part of the Course Goal.
9. Click **Save**.

Employee Level View and Editing: Education

Menu Selections to Access: Employees > Manage Employees

To add **Education**:

1. Select **Employee**.
2. Select **Employee Folder.**
3. Click **Education**.
4. Click **+ Add Education**.
5. Type or select from the drop-down Institution and Institution Location.
6. Select the Institution Type and Dates Attended.
7. Select the Degree and Field Of Study.
8. Click **Save**.

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Employee Level View and Editing: Position

Menu Selections to Access: Employees > Manage Employees

To manage an Employee **Position**:

1. Select **Employee.**
2. Select **Company Folder.**
3. Click **Position**.
4. Manage current position information for an Employee.
5. Click **Save**.

Employee Level View and Editing: Status

Menu Selections to Access: Employees > Manage Employees

To manage an Employee Status:

1. Select **Employee.**
2. Select **Company Folder.**
3. Click **Status**.
4. Manage status for an Employee (terminate or place on leave).
5. Click **Save**.

Employee Level View and Editing: Safety Incidents, Coaching, and Assets

Menu Selections to Access: Employees > Manage Employees

To manage an Employee's Safety Incidents, Coaching, and Assets:

1. Select **Employee.**
2. Select **Company Folder.**
3. Click **Safety Incidents or Coaching or Assets**.
4. Click Add button to add information.
5. Enter and manage information for an Employee.
6. Click **Save**.

NOTES:

Employee Level View and Editing: Time Off Benefits

Menu Selections to Access: Employees > Manage Employees

To manage an Employee Status:

1. Select **Employee.**
2. Select **Time & Attendance Folder.**
3. Click **Accrual Activity** to view current time off balances.
4. Click **Accrual Setup** to initially set up time off accrual codes.
5. Click **Save**.

Additional Resources

For additional information on Paycor HR:

- Click the **Get Help** link located on most screens.
- Contact your Paycor Representative with any questions you may have.