Employee Intake
Step by step

Demographics

Actions to get there:	**Employee Tab > Employee List > Create New Employee**	
	Information Recorded:	
1	Enter first & last name, phone number & email	
2	Click "Add New Employee"	
3	Create a temporary password	
4	Add additional information you would like to capture in demographics	
5	Navigate to Address tab on the left hand side of the menu - Enter Address details	
6	Navigate to Roles & Permissions - Select the appropriate role and toggle "ON"	
7	Navigate to Other Fields tab - Enter additional information	
8	Click "Save Employee"	

Contacts

Actions to get there:	**Employee Profile > Overview > Contacts**	
	Information Recorded:	This is for employee's contacts, incuding emergency
1	Click "contacts" located on the green bar	
2	"+ Add New Contact"	
3	Enter first & last name, phone number & email	
4	" + Add New Employee Contact"	
5	Enter relationship and contact type (optional) & any additional fields	
6	Click "Save"	
7	Toggle Emergency button to "ON" if this contact is an Emergency contact	

Employee Intake
Step by step

Attachments

	Employee Profile > Overview > Attachments	*These are attachments that will NOT live on your internal server*
	Information Recorded:	
1	Attachments to be scanned and uploaded to Overview section of the Employee Profile	

Skills & Qualifications

Actions to get there	Employee Profile > Skills and Qualifications
	Information Recorded:
1	Review list of Skills & Qualifications (pulled from library)
2	Select the appropriate Skills & Qualifications - click to toggle ON any skills this employee has
3	*Items that contain SET require an expiry date in order to turn ON*

Unavailability

Actions to get there:	**Employee Profile > Employment Tab > Unavailability**
	Information Recorded:
1	Click " + Add Unavailability"
2	Start typing to select the "type" of time off and chose from the drop down list
3	Select start date
4	If unavailability is "All Day" click the check box
5	If unavailability is not All Day, specify the Start & End Time & frequency
6	A preview of the dates will appear after unavailability is entered
7	Click "Save"

Employee Intake
Step by step

Employment Settings

Actions to get there:	**Employee Profile > Employement Tab > Employment Settings**	
	Information Recorded:	
1	Using the "Set/Edit" button, set the appropriate capacity, otherwise will default to 40 hours/week	
2	Add the SSN and **payroll number**	
3	Add any additionaly required information	
4	Navigate to the Notifications tab on the left side of the menu	
5	Enable appropriate notifications for the employee	
6	Click "Save"	

Custom Pay Rates

	Employee Profile > Employment > Custom Pay Rate	
	Information Recorded:	
1	Add in a custom pay rate for this employee	
2	"Add employee custom rate" > Select pay code > Add in custom rate and effective date	You will be able to indicate custom pay rates for specific clients by overriding the pay rate in a scheduled visit (Scheduling> Select specific visit> Accounting> Add pay rate

Employee Termination or Status Change

1	To terminate an employee, navigate to 'Overview' tab of the Employee Profile, and click on 'Terminate Employee' OR Navigate to Demographics and update Status. Save.	
2	The termination reason can be documented by adding an Employee Note	Document the new status and reason for status change.
NOTE:	**Terminating** an employee will revoke access to the mobile App. If you change an employee status to **suspended** you will also need to turn OFF their role to suspend access to the mobile app. They will see a notification indicating 'You do not have the required permissions to perform this action'	