

# Employee Master Data/Vacation/Benefits Tracking

This application was built using an ODBC link to Sage 300 CRE in order to use employee data already existing in the source system, but also allows the client to code and monitor other employee-related information not housed in Sage 300 CRE.

Benefit plans (health, dental, vision) offered and selected by each employee, by year, are tracked along with the employee cost of each plan. Additional benefit information (life insurance coverage/rates, 401(k) plan participation, car allowances, profit sharing eligibility, etc.) can also tracked.

Personalized benefit election reports can be automatically emailed to each active employee during open enrollment.

Prepare Group/Individual Emails to Employees/Supervisors for PTO/Benefits Close

| PTO  |  | Benefits   |
|--|--|--|
| <b>All Employees</b><br><i>(Creates a separate email to each employee using the same email text and attaches a personalized current year summary and current/prior year detail PTO report)</i> | <b>All Supervisors</b><br><i>(Creates a separate email to each supervisor using the same email text and attaches a personalized current year summary and current/prior year detail PTO report)</i> | <b>All Employees</b><br><i>(Creates a separate email to each employee using the same email text and attaches a personalized Benefits Open Enrollment report)</i> |
| <span>Prepare Email Text</span>  | <span>Prepare Email Text</span>  | <span>Prepare Email Text</span>  |
| <span>Email Current Year PTO Summary/Detail Reports</span>   | <span>Email Current Year PTO Summary/Detail Reports</span>   | <span>Email Benefit Open Enrollment Reports</span>   |

Email text is prepared once.

Open Enrollment Email Text Close

Welcome to the 2015 Benefits Open Enrollment process!

Please find your personalized benefits report attached. The report displays your current benefit selections and choices for your 2015 elections.

Each active employee is sent a separate email using the same email text, along with a personalized benefits report.

Benefits Open Enrollment - Message

File Message Insert Options Format Text Review

Paste Copy Format Painter Clipboard Basic Text Names

To... John.smith@ABCcompany.com

Cc...

Bcc...

Send

Subject: Benefits Open Enrollment

Attached: rptBenefitsSummary-OpenEnrollment.pdf (41 KB)

Welcome to the 2015 Benefits Open Enrollment process!

Please find your personalized benefits report attached. The report displays your current benefit selections and choices for your 2015 elections.

Enrollment for Plan Year 2015

John Smith  
123 Main Street...

|             |            |                            |           |                   |           |
|-------------|------------|----------------------------|-----------|-------------------|-----------|
| Supervisor: |            | Hire Date:                 | 8/31/2007 | Termination Date  |           |
| Office:     | Victor     | Office Start Date:         |           | Rehire Date:      |           |
| Dept:       | VCOMMERCIA | Vacation Eligibility Date: | 2/29/2008 | Anniversary Date: | 8/31/2008 |

**Current Medical, Dental, and Vision Plan Participation:**

Medical: Excellus EP Hybrid Plan  
Employee + Child(ren)

Dental: Excellus Dental  
Employee

**Next Year:**

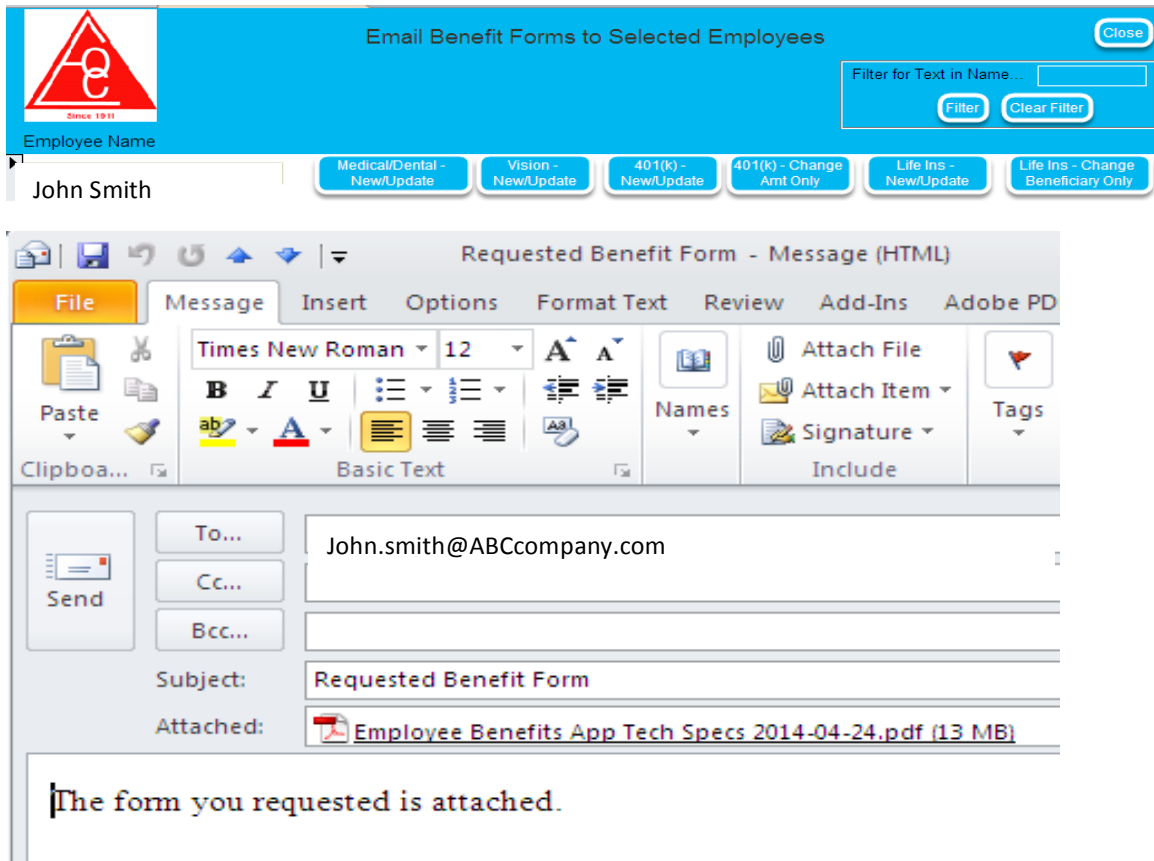
**MEDICAL PLAN**

- I will continue to participate at my current plan level for next year.
- I will make changes to my plan level for next year. **FORM REQUIRED!**
- I will start to participate in the plan next year. **FORM REQUIRED!**
- I will not participate in the plan next year.

**DENTAL PLAN**

- I will continue to participate at my current plan level for next year.
- I will make changes to my plan level for next year. **FORM REQUIRED!**
- I will start to participate in the plan next year. **FORM REQUIRED!**

Benefit enrollment forms (housed on the company network) can be automatically emailed to an employee, upon request.



The screenshot displays an email interface. At the top, a blue header reads "Email Benefit Forms to Selected Employees" with a "Close" button. Below this is a search filter "Filter for Text in Name..." with "John Smith" entered and "Filter" and "Clear Filter" buttons. A list of benefit categories is shown: "Medical/Dental - New/Update", "Vision - New/Update", "401(k) - New/Update", "401(k) - Change Amt Only", "Life Ins - New/Update", and "Life Ins - Change Beneficiary Only". The email body contains the text "The form you requested is attached." and an attachment icon for "Employee Benefits App Tech Specs 2014-04-24.pdf (13 MB)".

Employee PTO (Paid Time Off) accruals are automatically calculated based on company rules.

Employee PTO Notes:

History Notes:

| PTO Type         | From                 | Through              | Days Carried from Prior Year | Days Earned          | Days Used            | Days Outstanding     | Days Carried to Following Year | Days Forfeited       | Ending Balance       |
|------------------|----------------------|----------------------|------------------------------|----------------------|----------------------|----------------------|--------------------------------|----------------------|----------------------|
| Vacation         | <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"/> |
|                  | 8/31/2013            | 8/30/2014            | 3                            | 11                   | 4                    | 10                   | <input type="text"/>           | <input type="text"/> | <input type="text"/> |
|                  | 8/31/2014            | 8/30/2015            | <input type="text"/>         | 11                   | <input type="text"/> | <input type="text"/> | <input type="text"/>           | <input type="text"/> | <input type="text"/> |
| Sick             | 1/1/2014             | 12/31/2014           | <input type="text"/>         | 5                    | <input type="text"/> | 5                    | <input type="text"/>           | <input type="text"/> |                      |
| Floating Holiday | 11/15/2014           | 1/2/2015             | <input type="text"/>         | 1                    | <input type="text"/> | 1                    | <input type="text"/>           | <input type="text"/> |                      |

Employee PTO (Paid Time Off) used can be tracked.

|  |                                   |                                       |  |  |
|--|-----------------------------------|---------------------------------------|--|--|
| <input type="text" value="4/14/2014"/> | <input type="text" value="2.00"/> | <input type="text" value="Vacation"/> | <input type="text" value="Scheduled"/>         | <input type="text" value="4/14/14 &amp; 4/15/14"/> |
| <input type="text"/>                   | <input type="text"/>              | <input type="text"/>                  | <input type="text" value="Scheduled"/>         | <input type="text"/>                               |
| <input type="text"/>                   | <input type="text"/>              | <input type="text"/>                  | <input type="text" value="Taken"/>             | <input type="text"/>                               |
| <input type="text"/>                   | <input type="text"/>              | <input type="text"/>                  | <input type="text" value="Cancelled"/>         | <input type="text"/>                               |
| <input type="text"/>                   | <input type="text"/>              | <input type="text"/>                  | <input type="text" value="Taken w/o Pay"/>     | <input type="text"/>                               |
| <input type="text"/>                   | <input type="text"/>              | <input type="text"/>                  | <input type="text" value="Scheduled w/o Pay"/> | <input type="text"/>                               |

Employee PTO outstanding balances are automatically calculated based on company accrual and carry over rules. Personalized PTO reports can be automatically emailed to each active employee/supervisor throughout the year.

**Prepare Group/Individual Emails to Employees/Supervisors for PTO/Benefits** Close

| PTO  |  | Benefits   |
|--|--|--|
| <p style="text-align: center;"><b>All Employees</b></p> <p><i>(Creates a separate email to each employee using the same email text and attaches a personalized current year summary and current/prior year detail PTO report)</i></p> <p style="text-align: center; background-color: #e0f0e0; border: 1px solid #ccc; border-radius: 5px; margin: 5px 0;">Prepare Email Text</p> <p style="text-align: center; background-color: #00a0e3; color: white; border: 1px solid #ccc; border-radius: 5px; margin: 5px 0;">Email Current Year PTO Summary/Detail Reports</p> | <p style="text-align: center;"><b>All Supervisors</b></p> <p><i>(Creates a separate email to each supervisor using the same email text and attaches a personalized current year summary and current/prior year detail PTO report)</i></p> <p style="text-align: center; background-color: #00a0e3; color: white; border: 1px solid #ccc; border-radius: 5px; margin: 5px 0;">Prepare Email Text</p> <p style="text-align: center; background-color: #00a0e3; color: white; border: 1px solid #ccc; border-radius: 5px; margin: 5px 0;">Email Current Year PTO Summary/Detail Reports</p> | <p style="text-align: center;"><b>All Employees</b></p> <p><i>(Creates a separate email to each employee using the same email text and attaches a personalized Benefits Open Enrollment report)</i></p> <p style="text-align: center; background-color: #00a0e3; color: white; border: 1px solid #ccc; border-radius: 5px; margin: 5px 0;">Prepare Email Text</p> <p style="text-align: center; background-color: #00a0e3; color: white; border: 1px solid #ccc; border-radius: 5px; margin: 5px 0;">Email Benefit Open Enrollment Reports</p> |

PTO - Message (Plain Text)

File Message Insert Options Format Text Review

Paste Basic Text Attach File Attach Item Signature Include Tags

To... John.smith@ABCcompany.com

Cc...

Bcc...

Subject: PTO

Attached: [rptPTOCYSummaryDetailFilteredByEEName.pdf \(10 KB\)](#)

Please see attached.

Renire Date:

| Plan Year:       | 2014      |            | Days Carried from Prior Year | Days Earned | Days Used | Days Outstanding | Days Carried to Following Year | Days Forfeited | Ending Balance |
|------------------|-----------|------------|------------------------------|-------------|-----------|------------------|--------------------------------|----------------|----------------|
| PTO Type         | From      | Through    |                              |             |           |                  |                                |                |                |
| Vacation         |           |            |                              |             |           |                  |                                |                |                |
|                  | 8/31/2013 | 8/30/2014  | 3                            | 11          | 4         | 10               |                                |                |                |
|                  | 8/31/2014 | 8/30/2015  |                              | 11          |           |                  |                                |                |                |
| Sick             | 1/1/2014  | 12/31/2014 |                              | 5           |           | 5                |                                |                |                |
| Floating Holiday |           |            |                              | 1           |           | 1                |                                |                |                |

| PTO Used: | Date      | Days Used | Type     | Status | Description      |
|-----------|-----------|-----------|----------|--------|------------------|
|           | 4/8/2013  | 5         | Vacation | Taken  | 4/8/13 - 4/12/13 |
|           | 6/13/2013 | 1         | Vacation | Taken  |                  |
|           | 6/14/2013 | 1         | Vacation | Taken  |                  |

Documentation distributed to employees throughout the year can be tracked to ensure all signed copies are returned.

| Employee Documentation Distributed by Plan Year |            |            |            |            |            |            |  |
|---|------------|------------|------------|------------|------------|------------|--|
| Plan Year                                       | Document 1 | Document 2 | Document 3 | Document 4 | Document 5 | Document 6 |  |
| 2014  | PTO Memo   | Test2      |            |            |            |            |  |

| Employee Documentation Tracking 2014 |        |                                     |                          |                          |                          |                          |                          |
|--------------------------------------|--------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Employee                             | Office | Wages Earned                        | EE Handbook              | PTO Memo                 | Test2                    |                          |                          |
| WAKEFIELD; RONALD                    | Victor | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Several email groups are created automatically in the application based on 401(k) eligibility/participation, which enables the client to send group emails targeted at specific eligibility/participation levels.

**Prepare Group Email to Employees Based on 401(k) Eligibility and Participation** Close

|  |   |  |
|--|---|--|
| <p>401(k) Participating Employees</p> <p>Prepare Email Text</p> <p>Email</p> | <p>Non-Participating 401(k) Eligible Employees</p> <p>Prepare Email Text</p> <p>Email</p> | <p>Employees Becoming 401(k) Eligible Within 4 Months</p> <p>Prepare Email Text</p> <p>Email</p> |
|--|---|--|

Functionality also exists in the application that allows a user to send a group email to all employees or all supervisors.

Employee performance appraisals can be tracked for each year.

| Employee Performance Appraisals |                   |               |        |                |       |        |
|---------------------------------|-------------------|---------------|--------|----------------|-------|--------|
| Plan Year                       | Employee Name     | Supervisor    | Office | Appraisal Date | Rec'd | Attach |
| 2014                            | WAKEFIELD; RONALD | IORIO; PAUL A | Victor |                |       | 0(0)   |

Over 40 custom reports were created to provide the client with information distributed to employees, supervisors, and other departments relating to employee benefits and PTO, used to reconcile benefit plan carrier billings, used to identify missing information in the source system and data anomalies within the application, etc.

## Benefits

Blank Medical Dental or Vision Plan

Employee Benefit Summary

Benefit Summary for Selected Pay Freq

Benefit Summary for Selected Employee(s)

Employee Benefit Summary (All By Employee)

Life Insurance Summary

Life Insurance Summary for Selected Pay Freq

Employees Eligible for 401(k)

Employees Becoming 401(k) Eligible w/i 4 Mths

Non-Participating 401(k) Eligible Employees

Profit Sharing Summary

Car Allowance Summary

United Way Summary

FSA Summary

Vision Summary

Dental Summary

Medical Summary

Performance Appraisal Dates

Performance Appraisal Dates By PA Supervisor

## PTO

PTO Status Other Than Taken/Taken w/o Pay

PTO Report for Selected Status and Period

PTO Summary (All By Employee)

PTO Summary (All By Supervisor)

PTO Planned/Used (All By Employee)

PTO Planned/Used (All By Supervisor)

PTO Summary/Detail (All By Employee)

PTO Summary/Detail (All By Supervisor)

PTO Used/Scheduled in Excess of Earned

Expiring Vacation Time

Employee PTO Notes

Sick Time Taken in Excess

Outstanding Add'l Vacation Time

## Miscellaneous

Active Employees, Offices, and Supervisors

Birthday List by Office

Employee Documentation By Year

Current Supervisors

Completed benefit enrollment, PTO, and Performance Appraisal forms can be scanned and attached to the employee record, by year.

Employee Benefits for Plan Year 2015  
WAKEFIELD; RONALD

Select Year Close

Filter for Text in Name... wake

Filter Clear Filter

Print Current Email Current

Appraisal Date:

Date: 2/7/2014 DOB:

Start Date: 5/1/2014 Gender: Male

Election Form: @ (0)

Dept:

ADP Dept:

Double-click to view or add attachments.



