Payroll

Payroll Coordinators





Before we begin...



The following guidelines will support a successful learning experience.

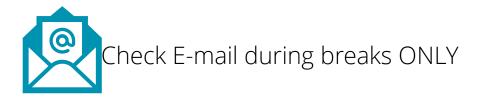


Check-In for Attendance





Silence cell phones





Complete post-training survey prior to leaving this session



Enjoy!

Introducing Course Owner

CHECK IN / ATTENDANCE

My name is

- ☐ Instructor Name
- ☐ Place of Birth
- Current Hometown
- ■What accomplishment are you most proud of?
- Which is harder to give up? Coffee or Wings?
- ☐ Is a hotdog a sandwich?



Training Icons



Throughout training, you will come across the following icons:



Instructor Demos: View a live demonstration of the system functionality



Take Note: Recommends that you take note of information needed for future activities



Important: Emphasizes information that can impact how you handle a specific area



System Exercises: Indicates that you will be participating in a group or paired activity



Remember: Reminds you about previous important information



Repeat Steps: Indicates a time in which previous steps you learned will be repeated related to accomplish a new objective



Quick Tip: Provides extra instructions intended to give immediate, practical advice



Knowledge Checks: Test your knowledge of key concepts

Course Overview



Welcome to the Payroll Coordinators training course. This course is designed to provide DeKalb County Payroll Coordinators with an overview of managing Payroll within CV360.

Who should take this course?

Payroll Coordinators



Prerequisites:

We recommend the following prerequisites before taking this course:



• CV360 Navigation Training

Duration:

2 Hours



Course Objectives:



Upon the completion of the Payroll Coordinators course, you will be able to:

Objectives

- Manage Person
- Manage Employment
- Manage Absence
- Manage Compensation
- Benefits Administration
- View Pay Slips
- View Report
- Manage Approvals





Below is a list of the sections within this course as well as an estimated duration of each

#	Payroll Coordinators	Duration
1	Manage Person	15 Minutes
2	Manage Employment	30 Minutes
3	Manage Transfers (Promotion, Demotion, Transfer)	20 Minutes
4	Manage Absence	20 Minutes
5	Manage Compensation	20 Minutes
6	Benefits Administration	15 Minutes
7	View an Employee's Pay slip	10 Minutes
8	View a Report	10 Minutes
9	Manage Approvals	10 Minutes

Payroll Coordinators

Lesson 1: Manage Person



Lesson Objectives:



Upon the completion of the Manage Person lesson, you will be able to:

Objectives

- View an Employee's Personal and Biographical Information
- View an Employee's Extra Information: Company Asset and Medicare Indicators

Payroll Coordinators

Lesson 1: Manage Person Section 1: View an Employee's Demographic and Biographic Information



Lesson Objective:

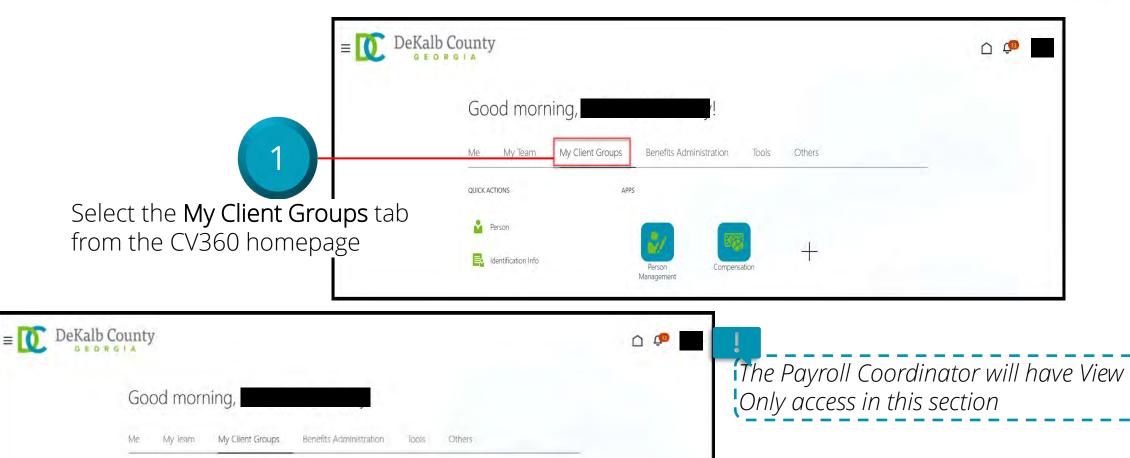


Upon the completion of the Manage Person: View an Employee's Demographic and Biographic Information lesson, you will be able to:

Objective

• View an Employee's Personal and Biographical Information





Good morning,

Me My Team My Client Groups Benefits Administration Tools Others

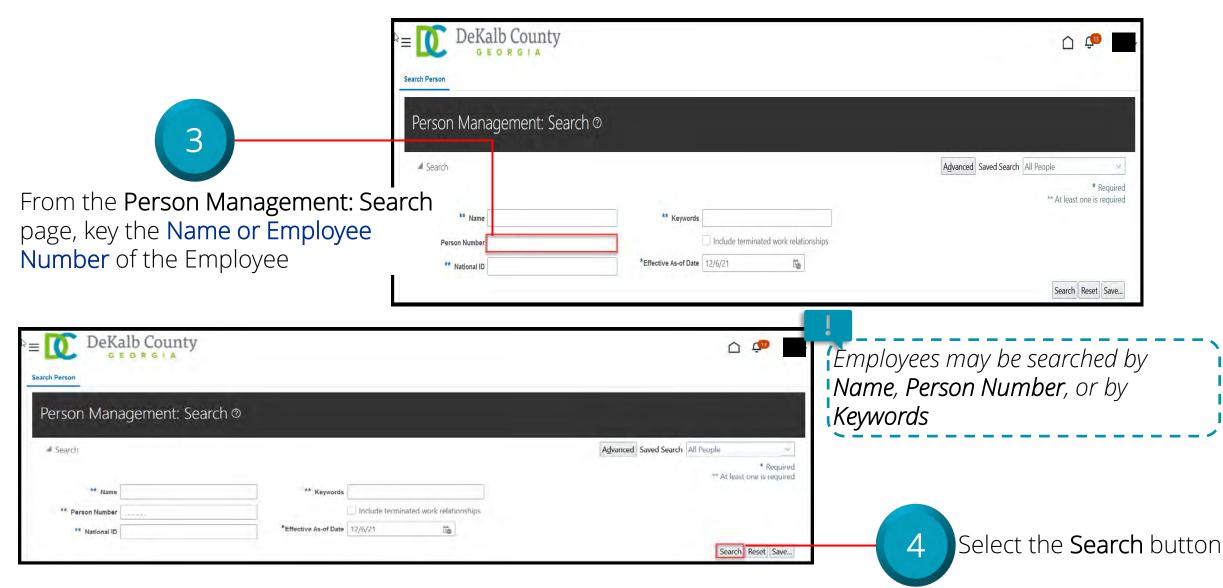
Quick Actions APPS

Person
Management

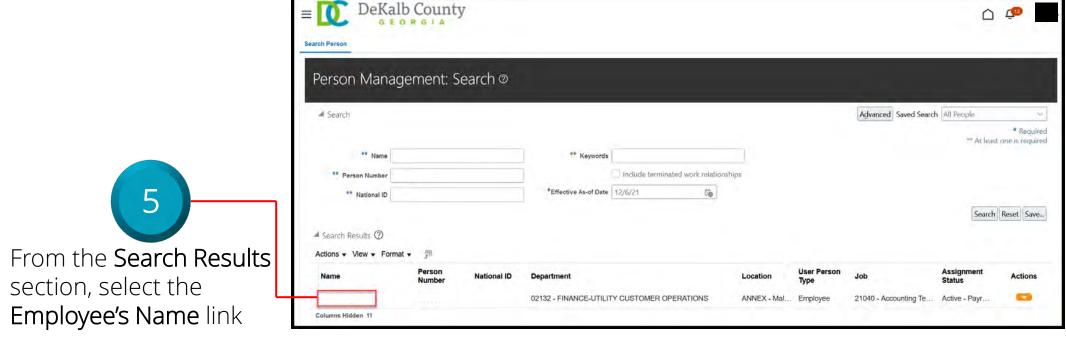
Compensation

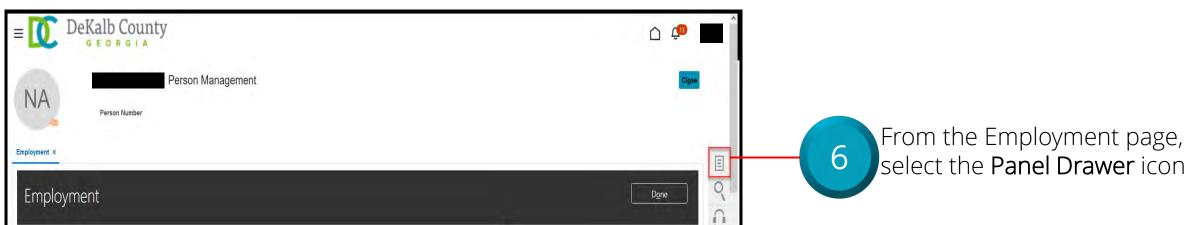
Select the **Person**Management tile within the Apps area



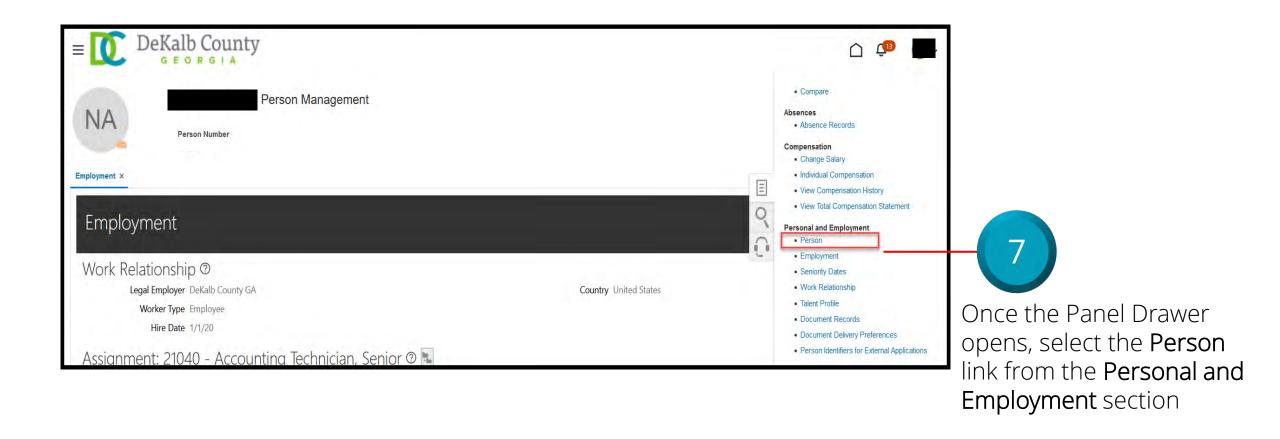








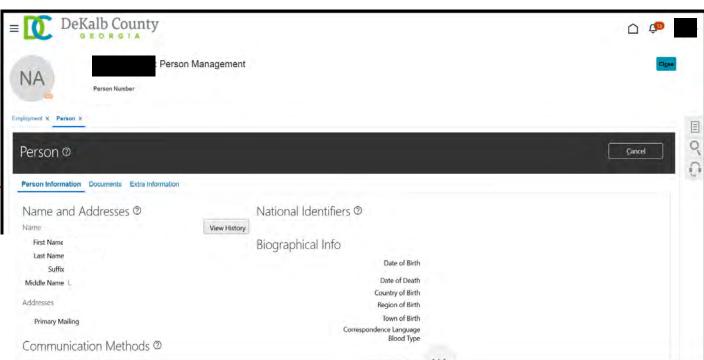






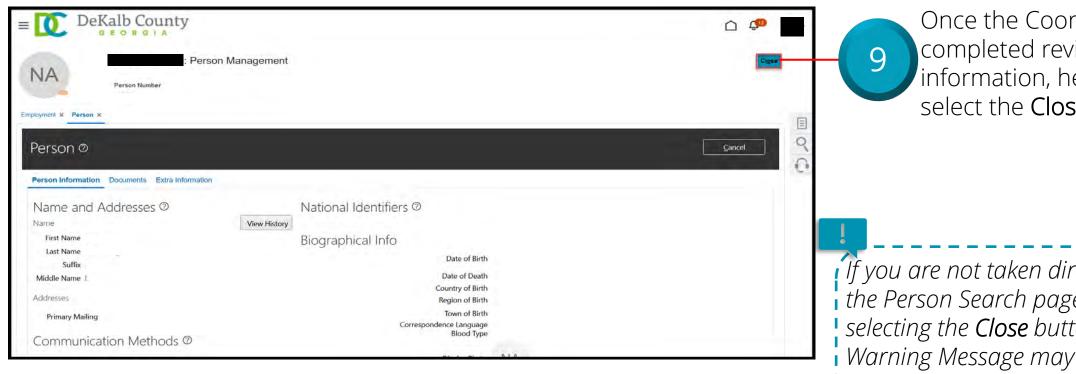


From the **Person** page, the Coordinator can view the Employee's Biographical and Demographic Information such as Name and Address, Communication Methods, Biographical Information, and Legislative Information. Scroll down through the page to view the complete details



All sensitive information such as Date of Birth and Social Security Number have been hidden from this role





Once the Coordinator has completed reviewing the information, he/she can select the **Close** button

If you are not taken directly back to the Person Search page after selecting the Close button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 1: Manage Person Section 2: View an Employee's Extra Information







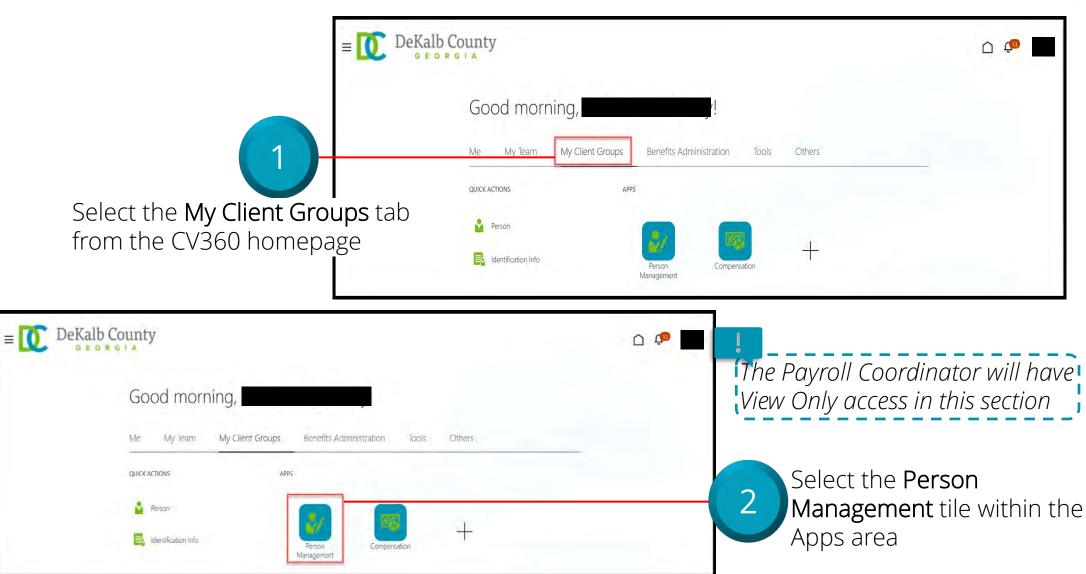
Upon the completion of the Manage Person: View an Employee's Extra Information lesson, you will be able to:

Objective

• View an Employee's Extra Information: Company Asset and Medicare Indicators

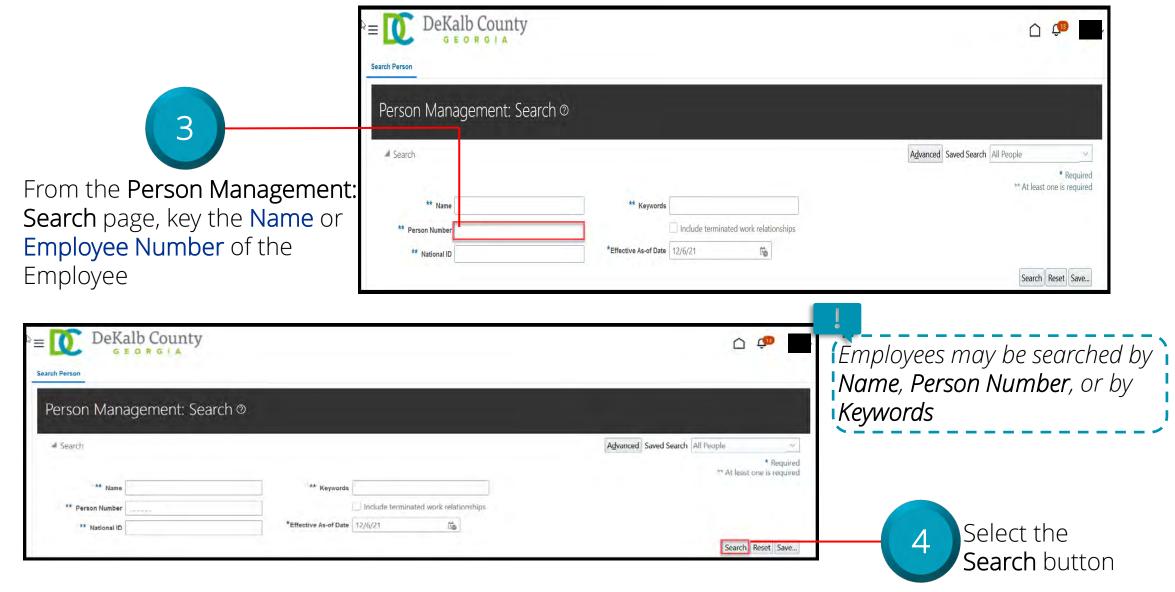




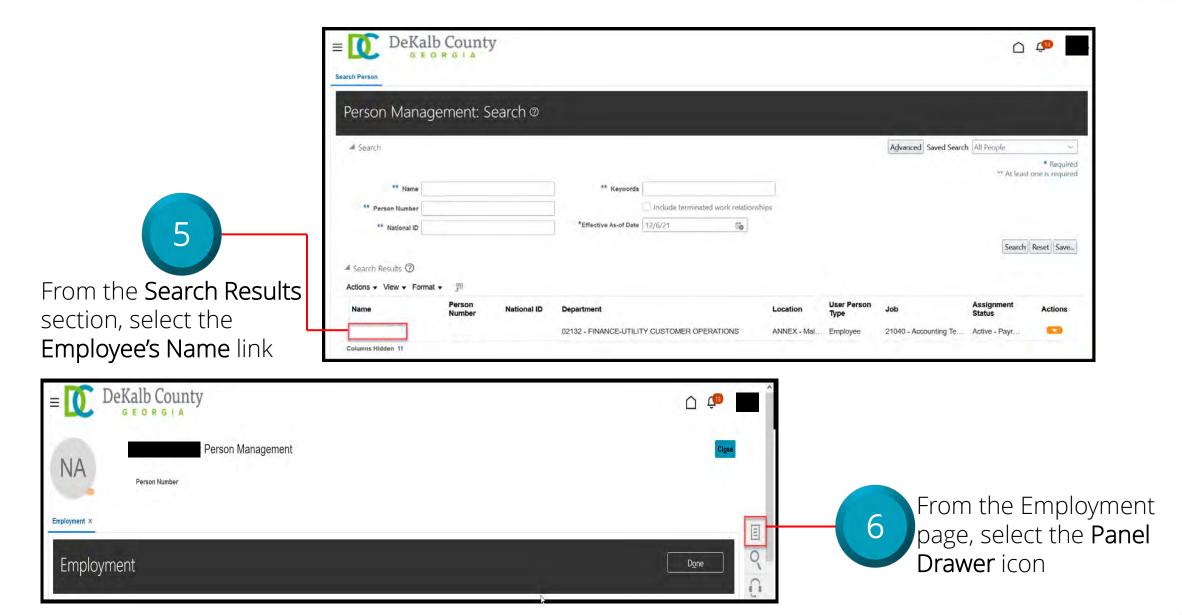




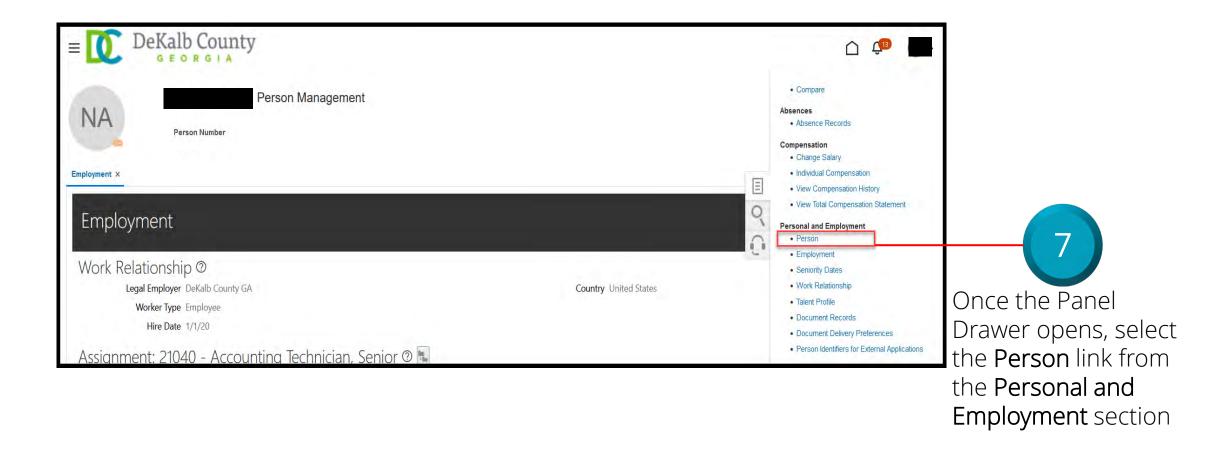






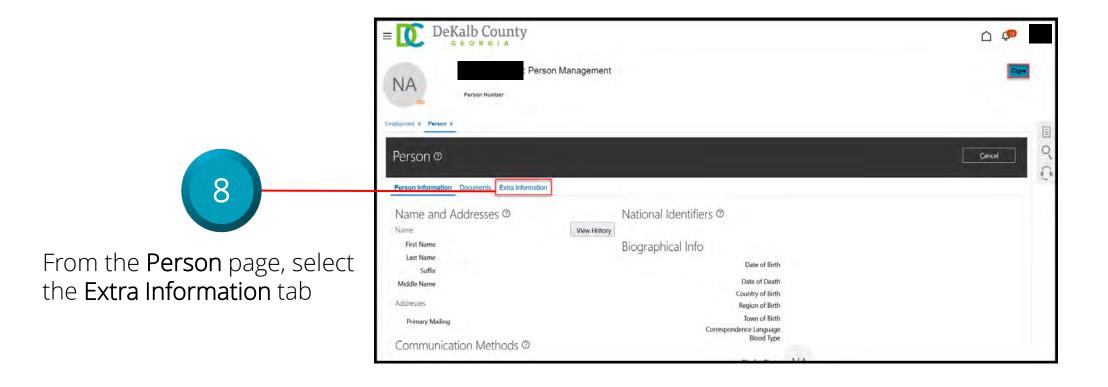








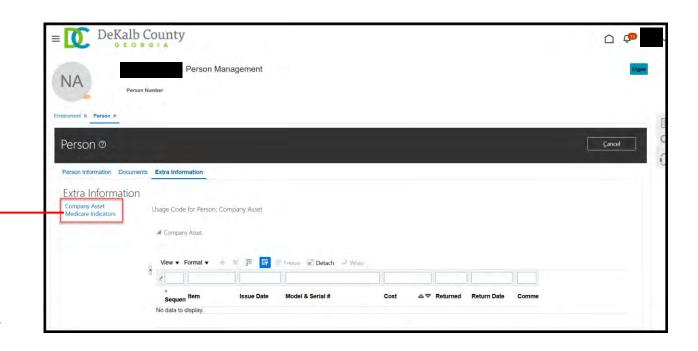








From the Extra Information tab, the Coordinator can review details such as Company Asset and Medicare Indicators if the information is populated. If the information has not been provided, then these fields would be blank



To view the details, select each link. If information is provided, the Coordinator will be able to see the details for each link







Which of the following tabs allows a Payroll Coordinator to view the information related to Company Asset and Medicare Indicators?

A. Personal Information

B. Person

C. Documents

D. Extra Information





Which of the following tabs allows a Payroll Coordinator to view the information related to Company Asset and Medicare Indicators?

A. Personal Information

B. Person

C. Documents

D. Extra Information



The correct answer is D. Payroll Coordinators can view information related to Company Asset and Medicare Indicators under the Extra Information tab



Payroll Coordinators can only search for an Employee using the Name field. *True or False?*

A. True

B. False





Payroll Coordinators can only search for an Employee using the Name field. *True or False?*

A. True

B. False



The correct answer is B. An Employee can be searched using the Name, Person Number or Keywords fields

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View the Medicare Indicators for an Employee

Payroll Coordinators

Lesson 2: Manage Employment







Upon the completion of the Manage Employment lesson, you will be able to:

Objectives

- Update an Employee's Assignment Information
- View an Employee's Seniority Dates
- View an Employee's Work Relationship Details
- Manage Promotions, Demotions, and Transfers
- View an Employee's Skills and Qualifications Details
- View an Employee's Document Records
- Add a Document of Record for an Employee
- View an Employee's Document Delivery Preferences Will Not Be Accessible
- View an Employee's Person Identifiers for External Applications

Payroll Coordinators

Lesson 2: Manage Employment Section 1: Update an Employee's Assignment Details



Lesson Objective:



Upon the completion of the Manage Employment: Update an Employee's Assignment Details lesson, you will be able to:

Objective

• Update an Employee's Assignment Information

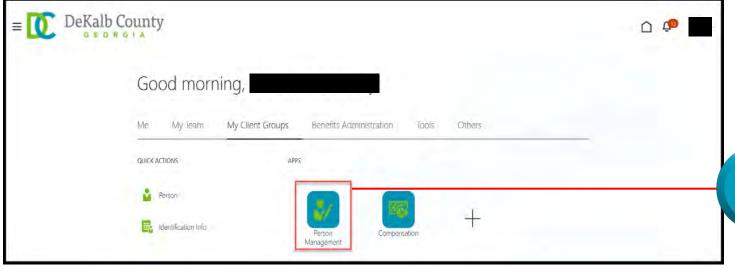
!

As a Payroll Coordinator, access to promote, transfer, and make assignment changes will be available. In this example, an Assignment Status change will be made for an employee





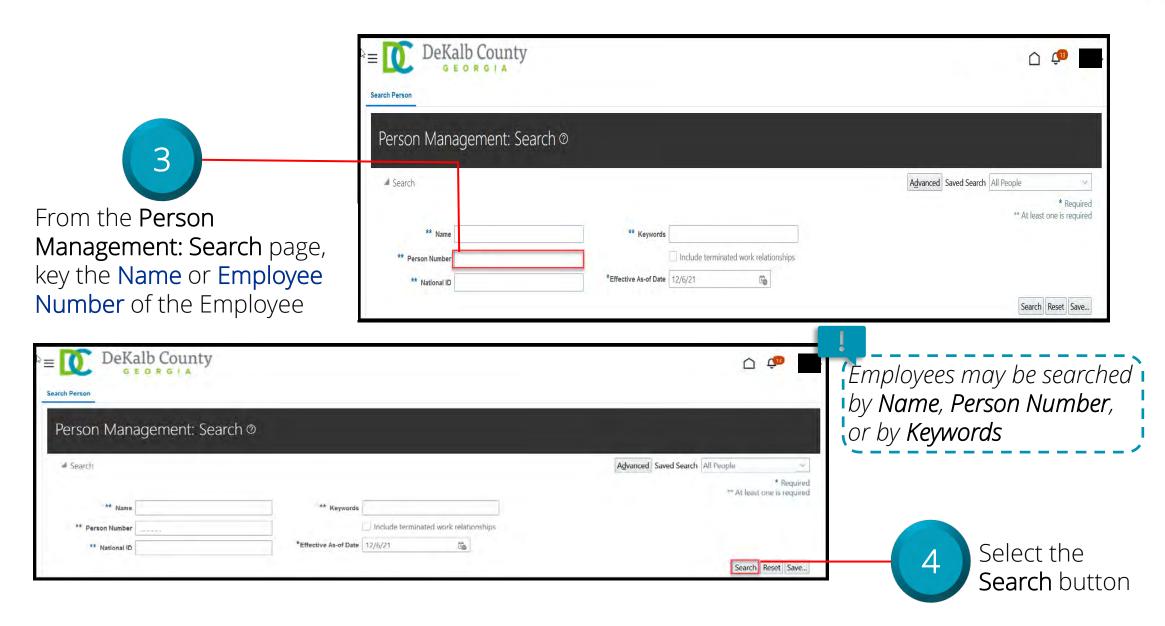




Select the **Person Management** tile within the Apps area

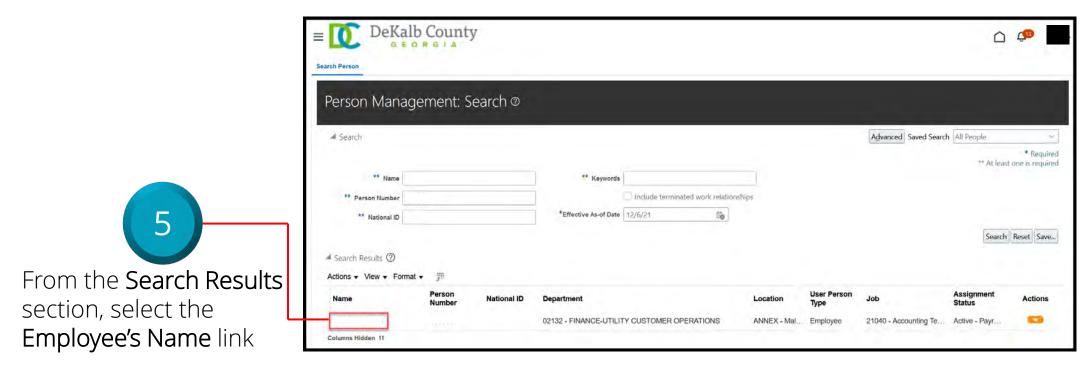










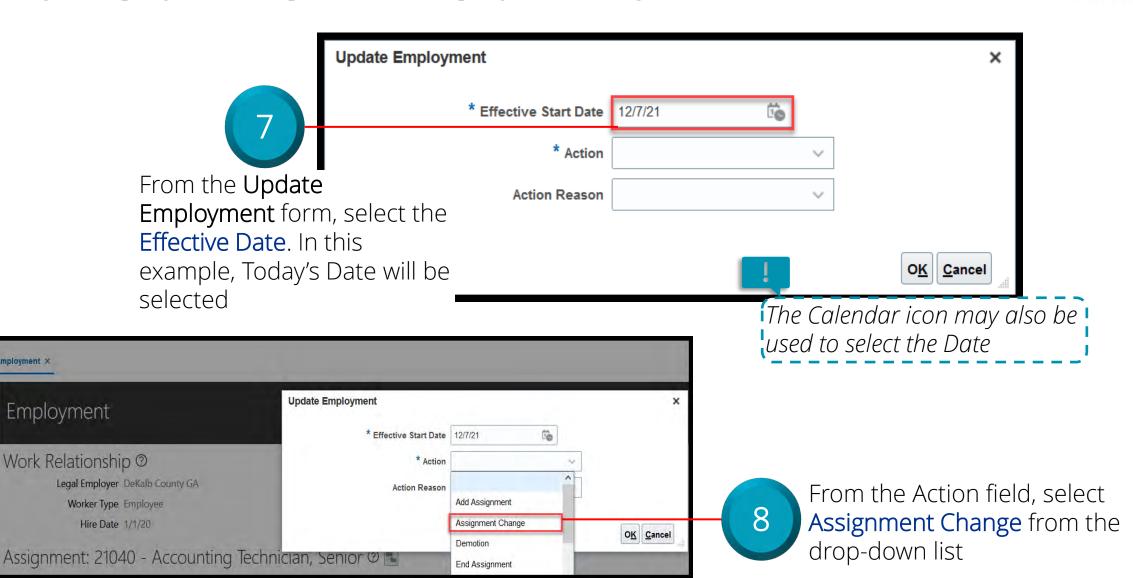




From the Employment page, select the Edit button. Select **Update** from the drop-down

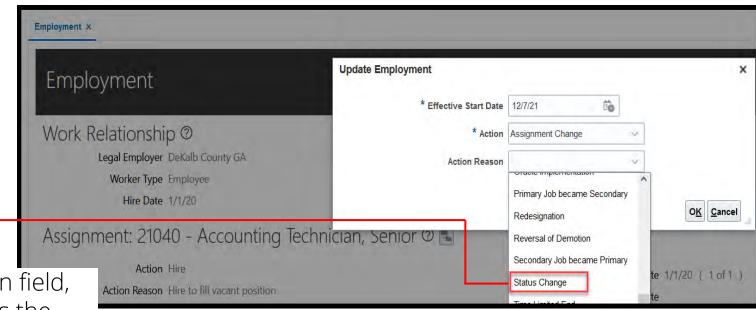
Employment ×











From the Action Reason field, select **Status Change** as the reason from the drop-down list

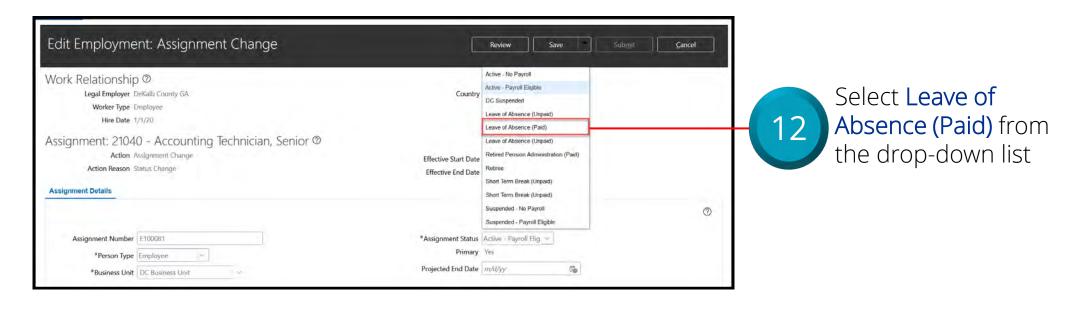
Update Employment			×		
* Effective Start Date	12/7/21	10			
* Action	Assignment Change	~			
Action Reason	Status Change	~			
			O <u>K</u> Cancel	10	Select the OK button



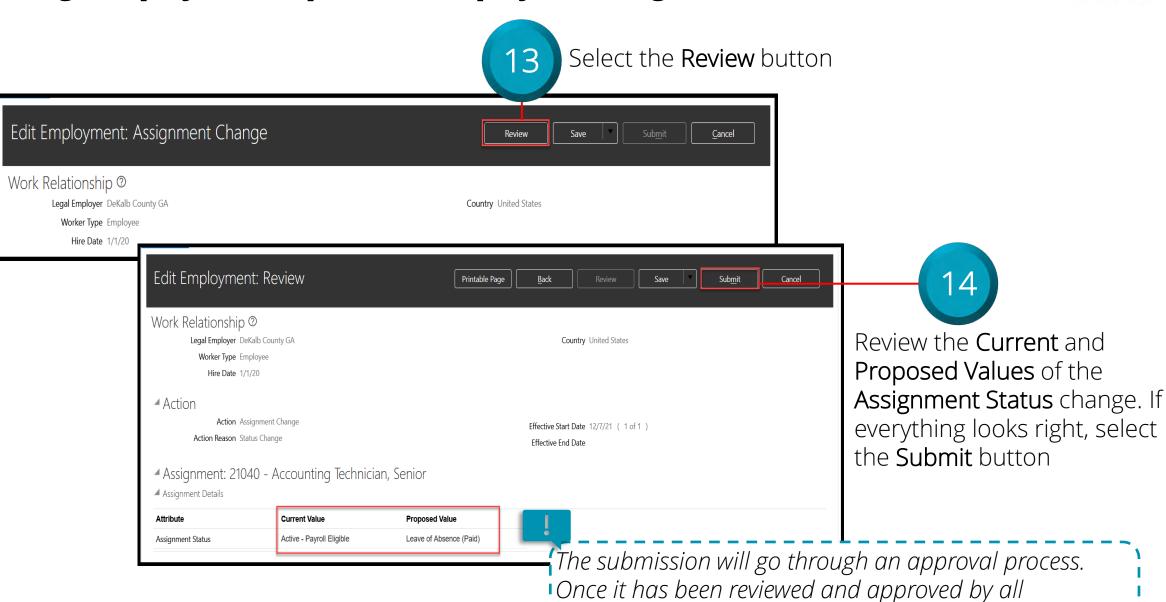
11

In the example, the Employee's Assignment Status is going to change from Active- Payroll Eligible to Leave of Absence (Paid). From the Employment page, navigate to the Assignment Status field









approvers, it will be committed to the database

42





Once the Coordinator has completed submission, he/she can select the **Close** button

If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 2: Manage Employment Section 2: View an Employee's Seniority Dates Details



Lesson Objective:



Upon the completion of the Manage Employment: View an Employee's Seniority Dates Details lesson, you will be able to:

Objective

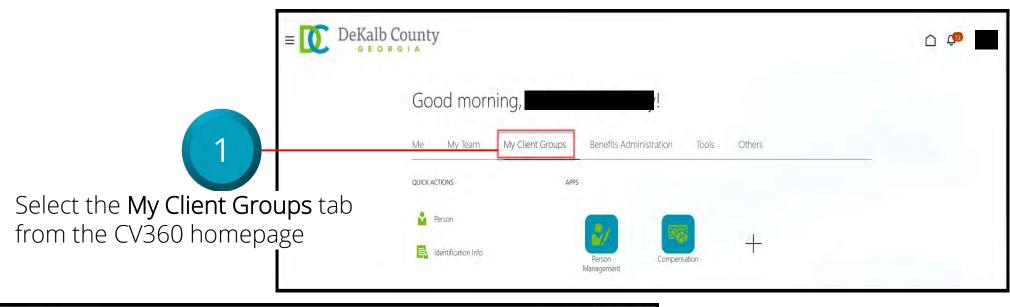
View an Employee's Seniority Dates

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Seniority Dates are calculated dates that provide the length of service an employee has been with DeKalb County. These dates would house the Employee's Latest Start Date as well as his/her Original Date of Hire



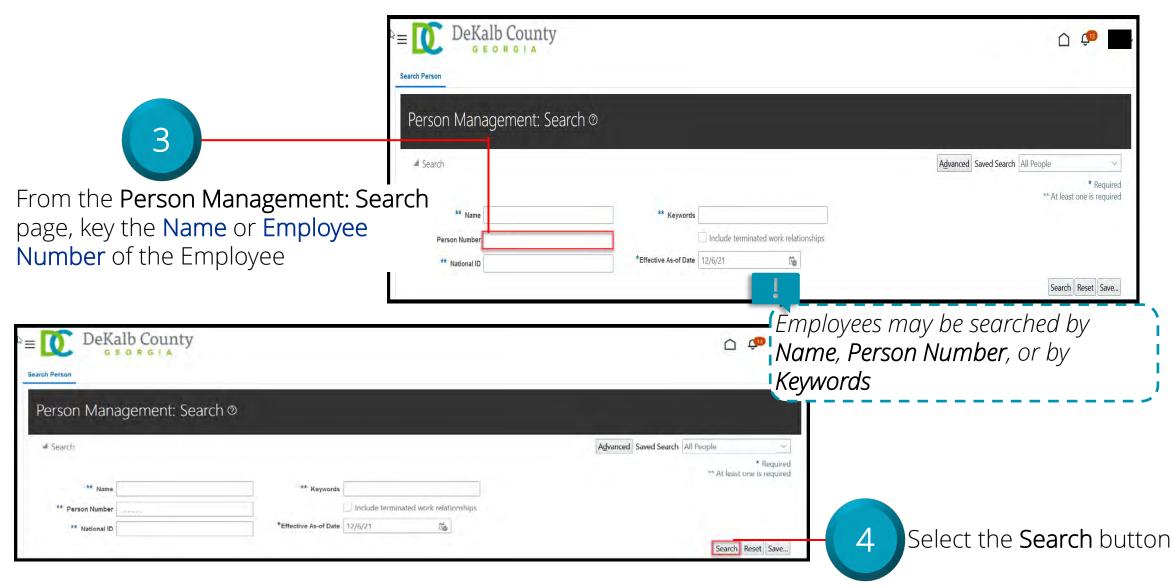






Select the **Person Management** tile within the Apps area

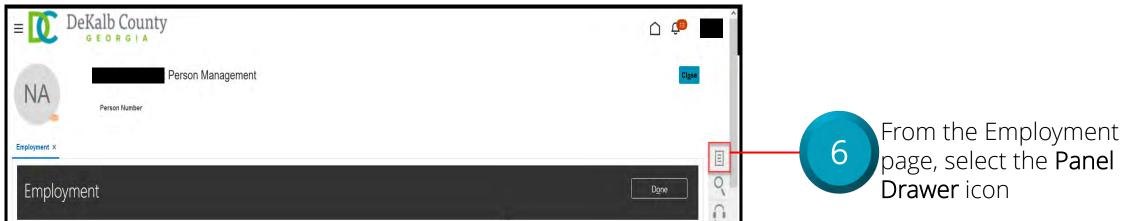




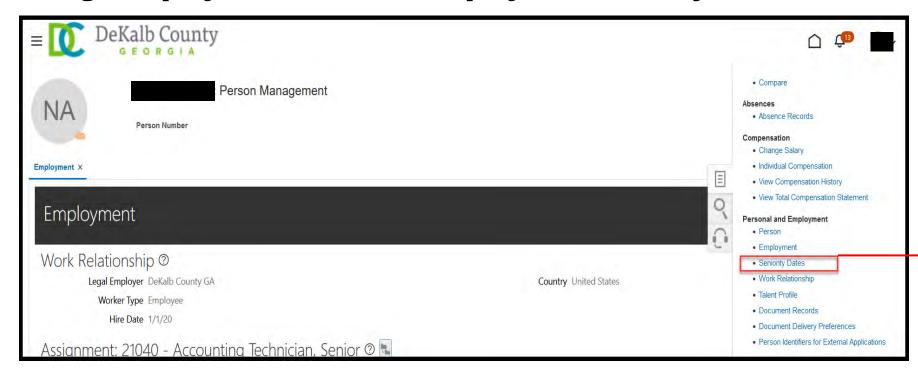










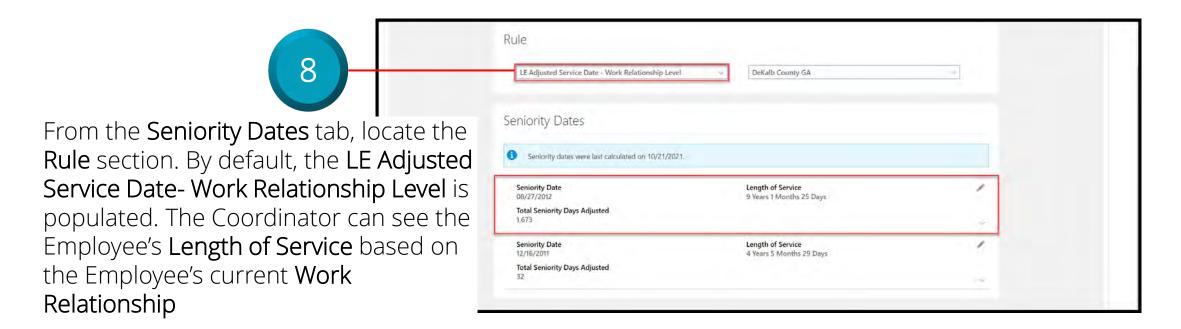


Once the Panel Drawer opens, select the Seniority Dates link from the Personal and Employment section



Two Seniority Dates the Coordinator would be most interested in reviewing would be the LE Adjusted Service Date which is also known as the Latest Start Date and the Enterprise Seniority Date which is also known as the Original Date of Hire





The **Seniority Dates** page will house historical work relationship dates. Each Historical Record indicates a prior Work Relationship and is independent of the Employee's current Work Relationship









The Coordinator can now see the total Length of Service for an Employee based on his/her Original Date of Hire





If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 2: Manage Employment Section 3: View an Employee's Work Relationship Details



Lesson Objective:



Upon the completion of the Manage Employment: View an Employee's Work Relationship Details lesson, you will be able to:

Objective

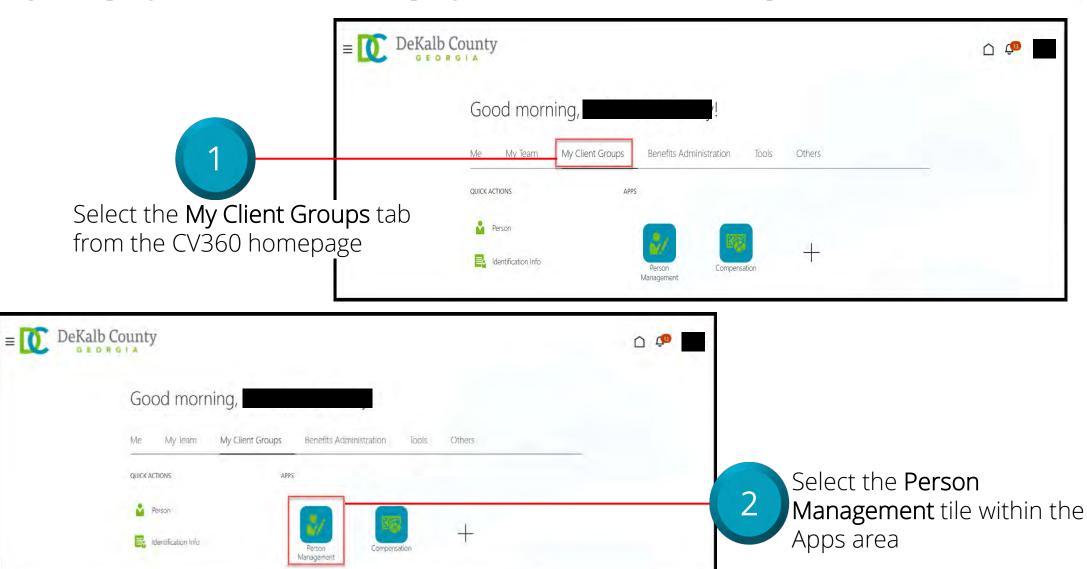
View an Employee's Work Relationship Details

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Work Relationship is the relationship that an Employee has with DeKalb County. An Employee can only have a single Work Relationship at one time. The details include the Length of Service the Employee has been in the Work Relationship

Manage Employment: View an Employee's Work Relationship Details





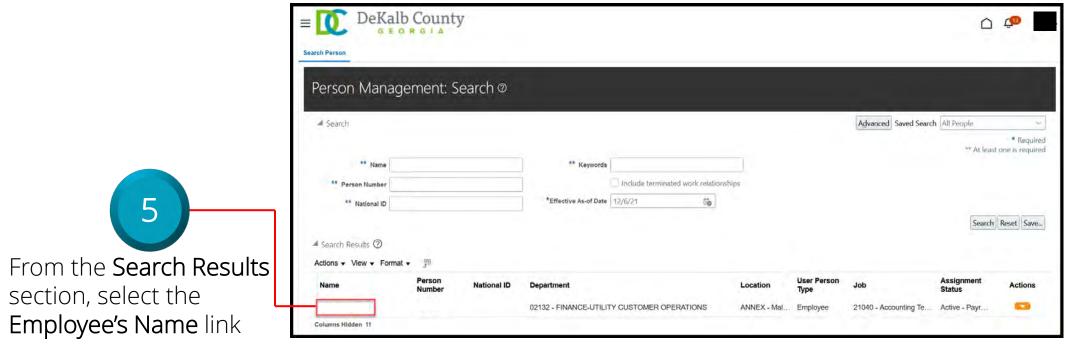
















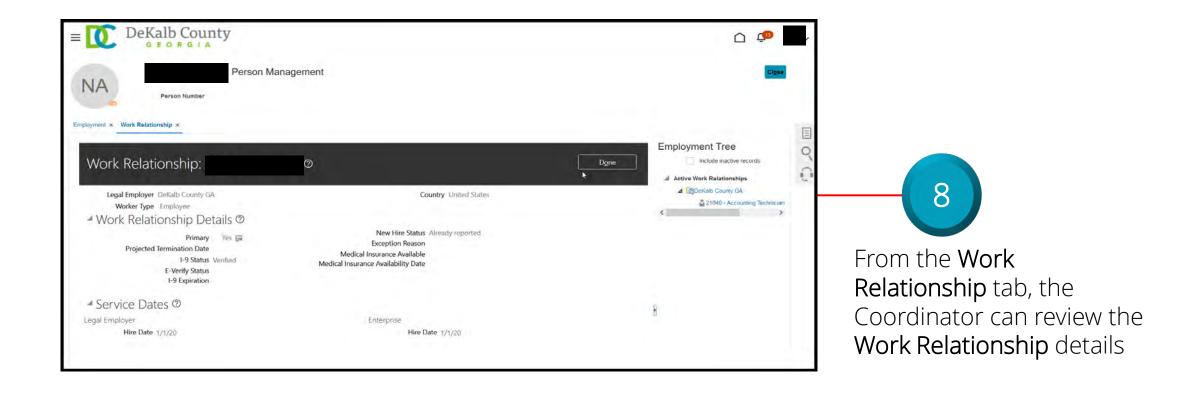




Once the Panel
Drawer opens, select
the Work Relationship
link from the Personal
and Employment
section







Manage Employment: View an Employee's Work Relationship Details





Once the Coordinator has completed reviewing the employee's Work Relationship details, he/she can select the Close button

If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 2: Manage Employment Section 4: View an Employee's Talent Profile: Skills and Qualifications Details



Lesson Objective:



Upon the completion of the Manage Employment: View an Employee's Talent Profile- Skills and Qualifications Details lesson, you will be able to:

Objective

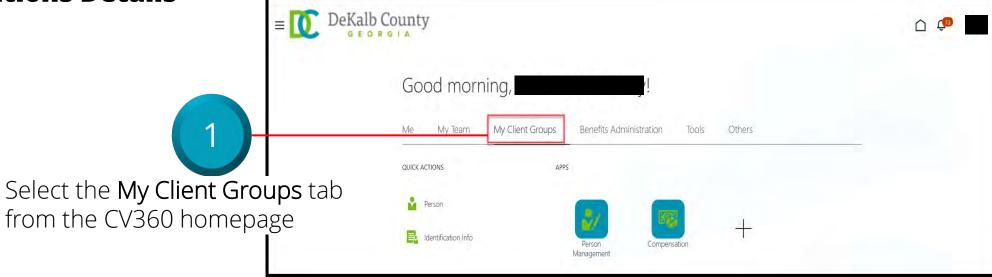
View an Employee's Skills and Qualifications Details

Talent Profile serves as an internal resume, enabling Employees to create and maintain a profile that includes Career/Work Experience, Educational Background, Certifications, Skills, Professional Affiliations, and Achievements

CloudVergent 360

Manage Employment: View an Employee's Talent Profile: Skills and

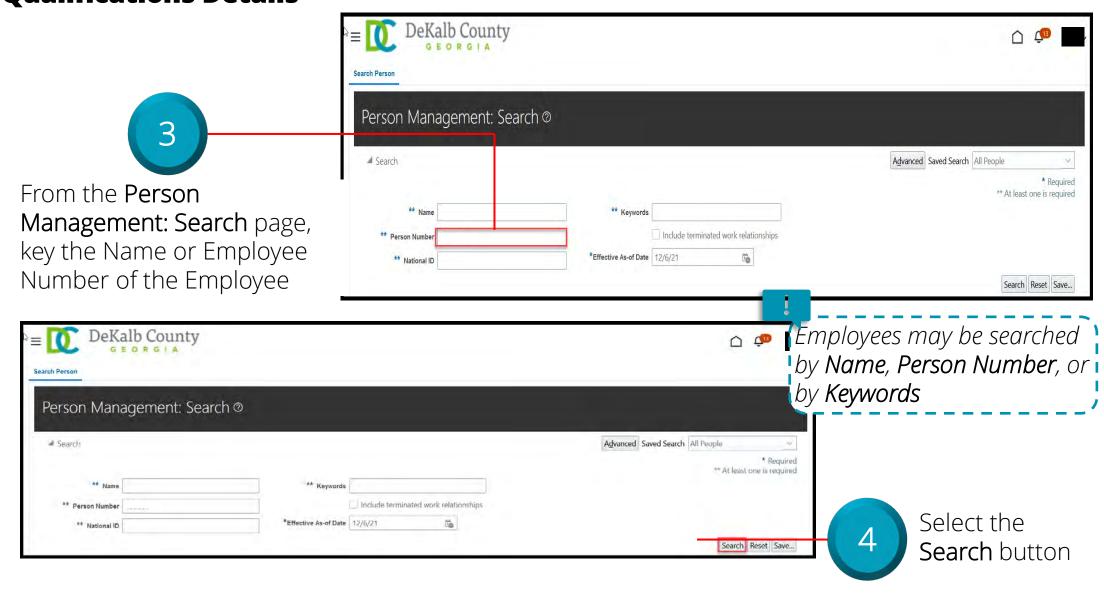
Qualifications Details





Select the **Person Management** tile within the Apps area





Manage Employment: View an Employee's Talent Profile: Skills and

Qualifications Details

section, select the

employee's name link



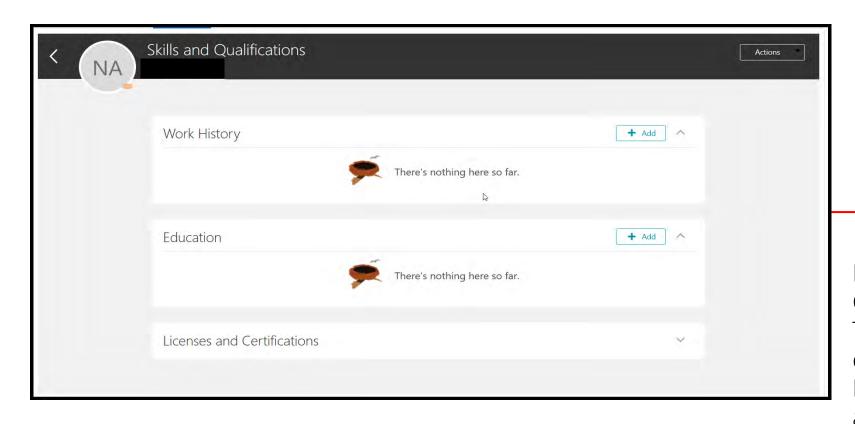






Once the Panel Drawer opens, select the **Talent Profile** link from the **Personal and Employment** section





From the Talent Profile tab, the Coordinator can review the Talent details entered for the employee. If no Talent Profile Information was provided, then a message, There's nothing here so far, will display in the sections this is applicable to





Once the Coordinator has completed reviewing the Talent details or there are no Talent details, he/she can select the **Close** button

If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 2: Manage Employment Section 5: View an Employee's Document Records Details



Lesson Objective:



Upon the completion of the Manage Employment: View an Employee's Document Records Details lesson, you will be able to:

Objective

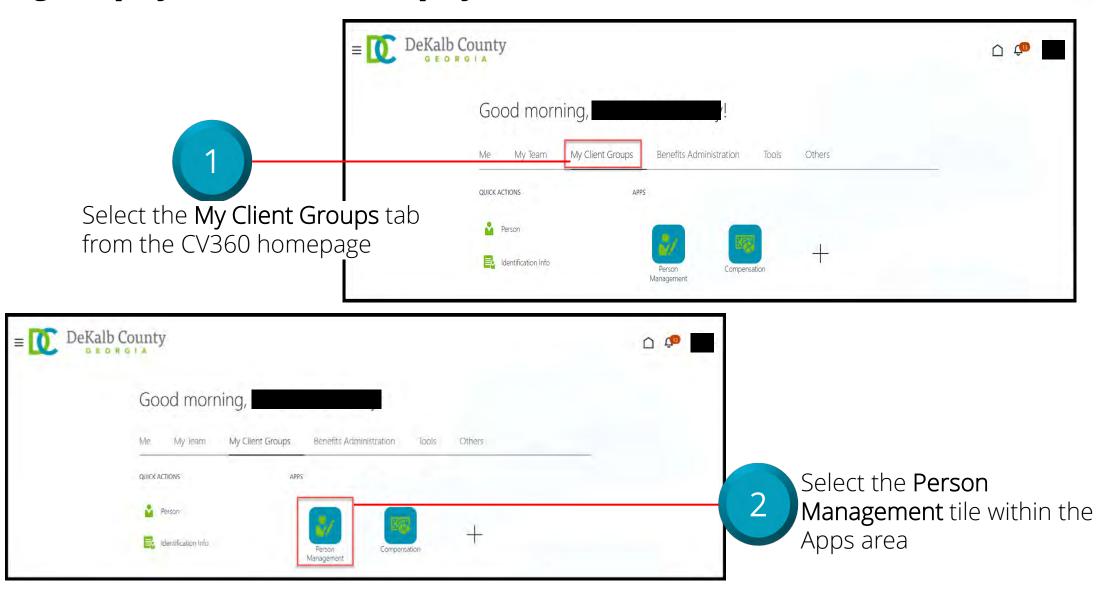
View an Employee's Document Records



Documents may be assigned to Employees to capture specific information requested by various Work Areas such as Human Resources and Benefits. These documents are stored within the Document Records Work Area

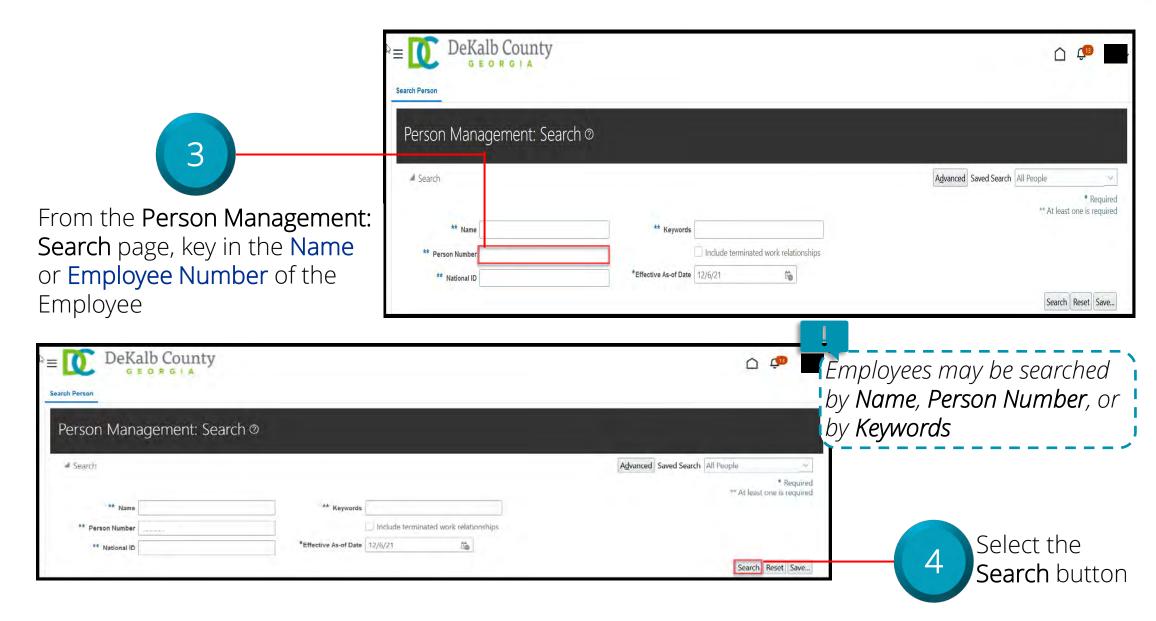
Manage Employment: View an Employee's Document Records Details







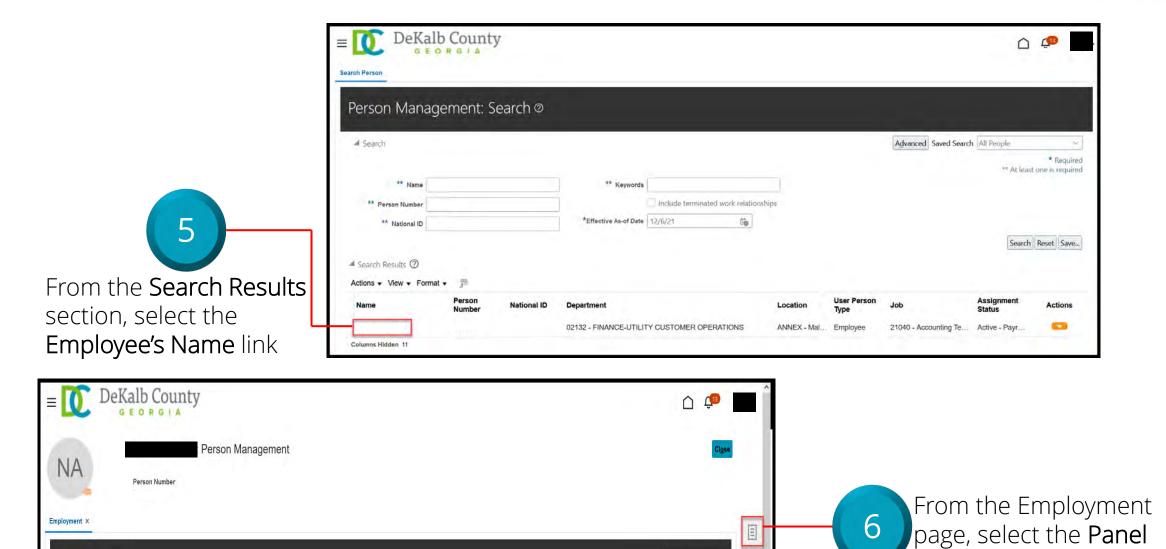






Employment



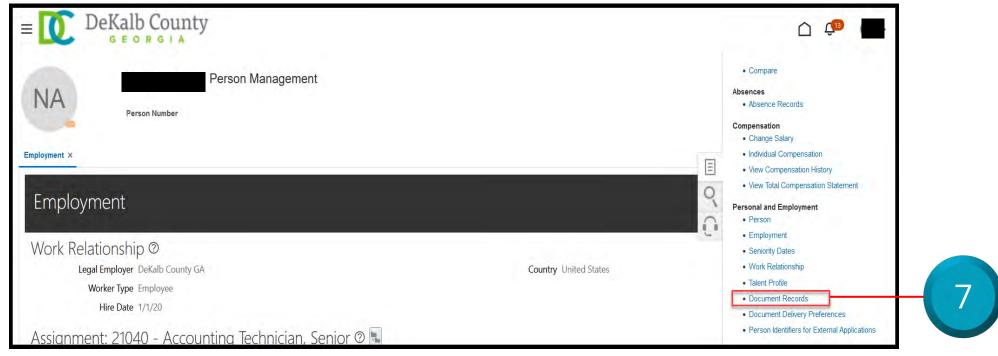


Done

Drawer icon



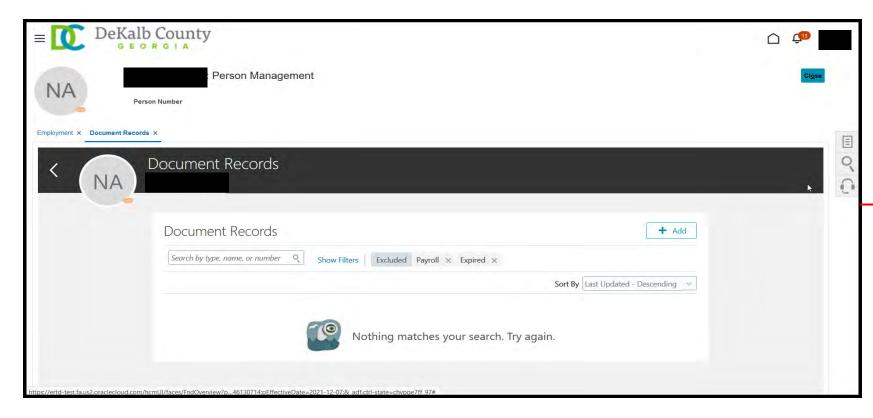




Once the Panel Drawer opens, select the Document Records link from the Personal and Employment section



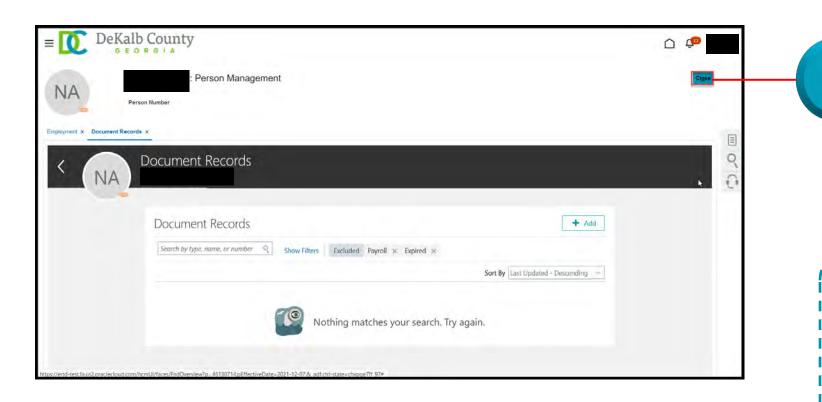




From the Document
Records tab, the
Coordinator can review the
Documents assigned to the
Employee. If no Documents
were assigned, a message,
There's nothing here so far,
will appear on the page







Once the Coordinator has completed reviewing the Document details or there are no Documents, he/she can select the **Close** button

If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 2: Manage Employment Section 6: Add a Document of Record



Lesson Objective:



Upon the completion of the Manage Employment: Add a Document of Record lesson, you will be able to:

Objective

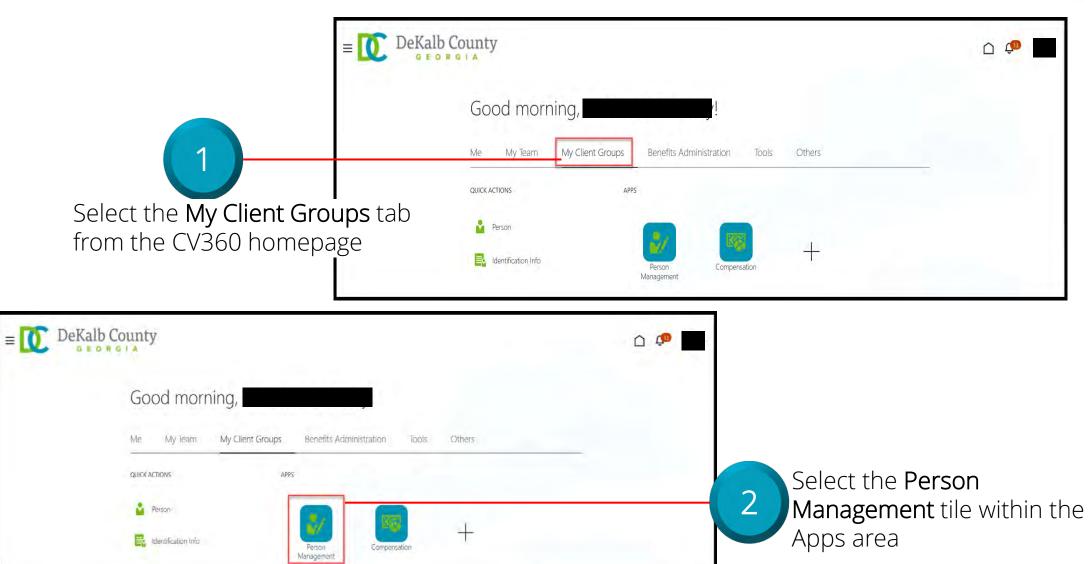
Add a Document of Record

!

Documents may be assigned to Employees to capture specific information requested by various work areas such as Human Resources and Benefits. These documents are stored within the Document Records Work Area

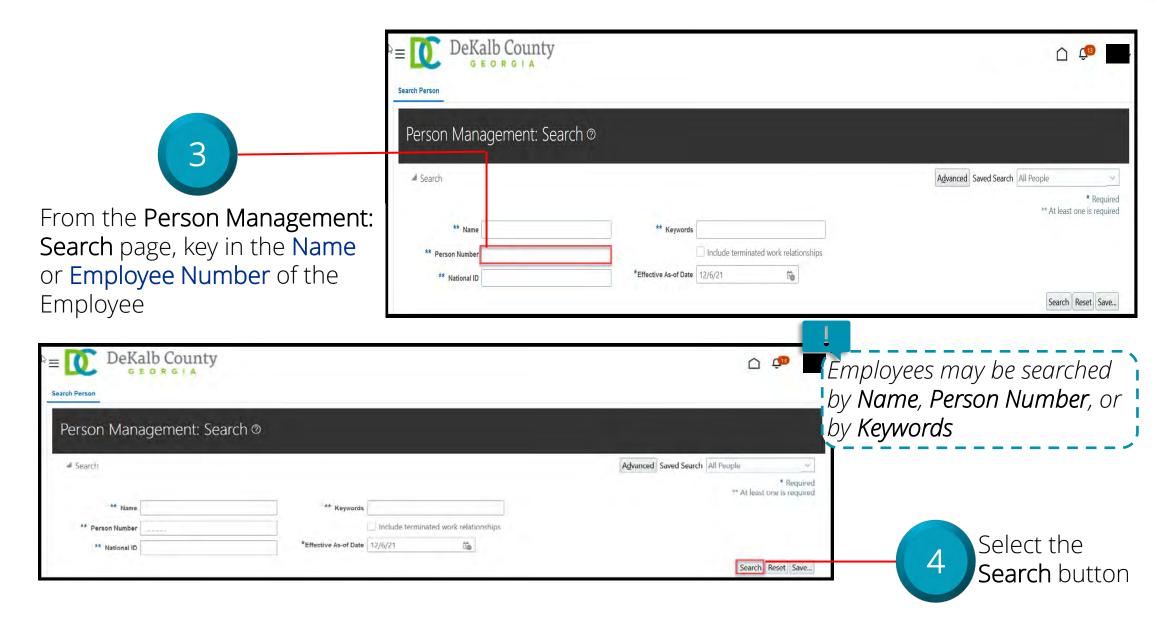




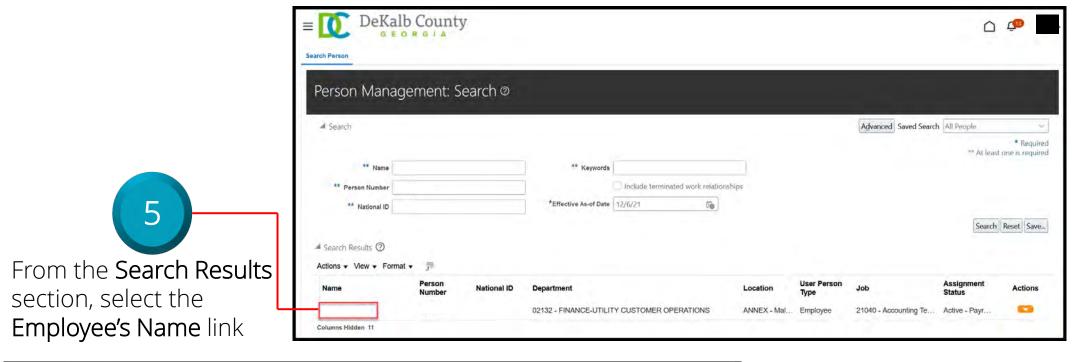


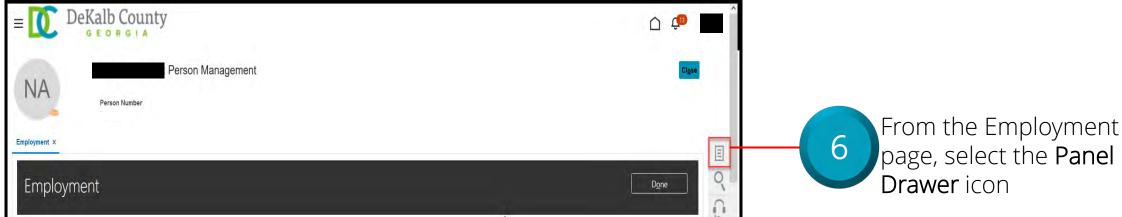












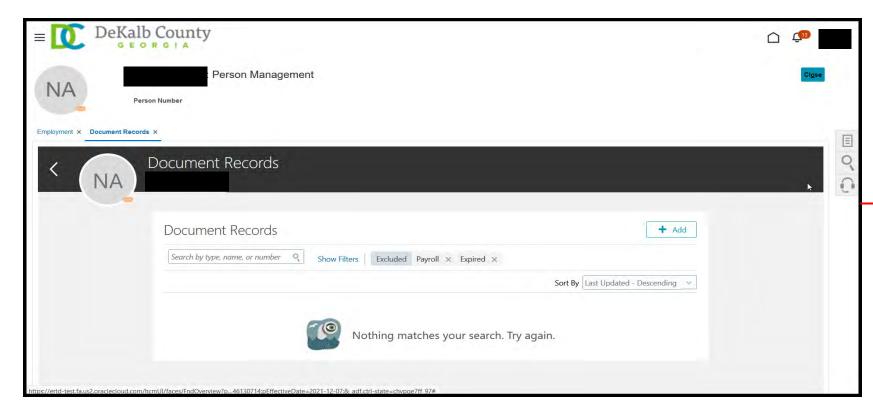




Once the Panel Drawer opens, select the Document Records link from the Personal and Employment section

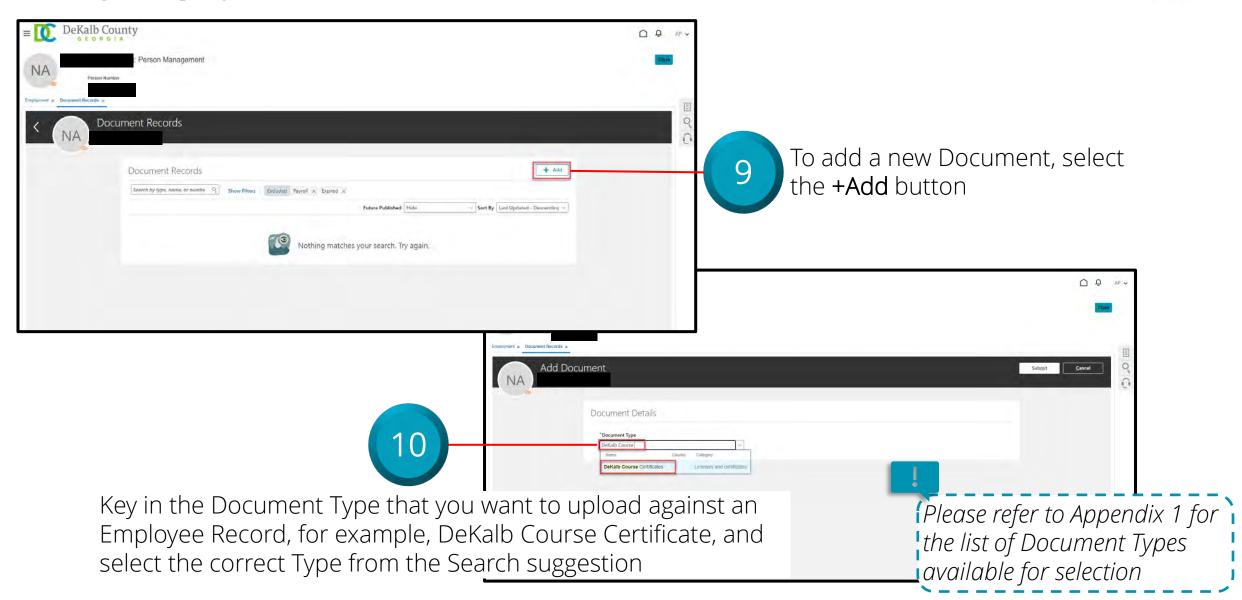




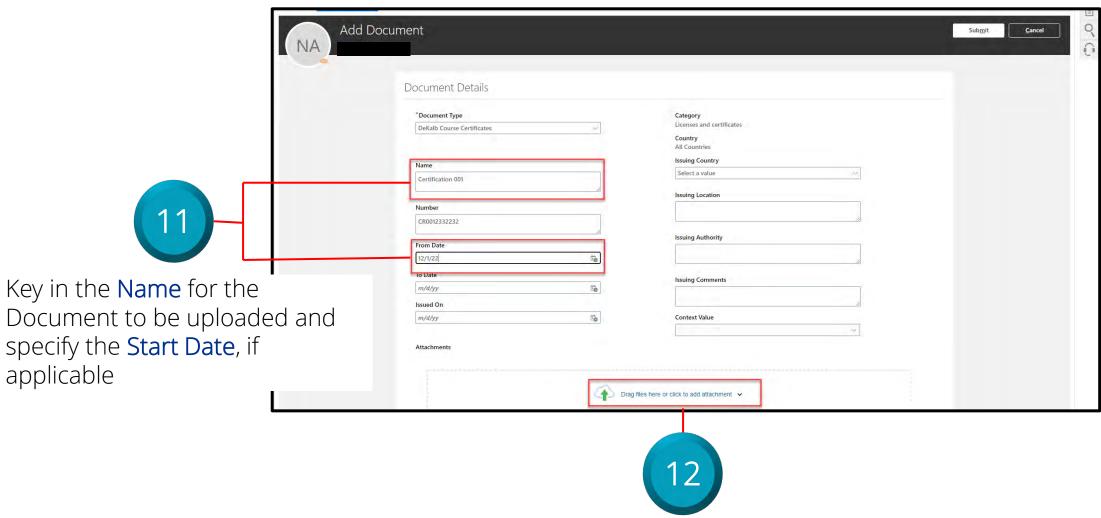


From the Document
Records tab, the
Coordinator can review the
Documents assigned to the
Employee. If no Documents
were assigned, a message,
There's nothing here so far,
will appear on the page





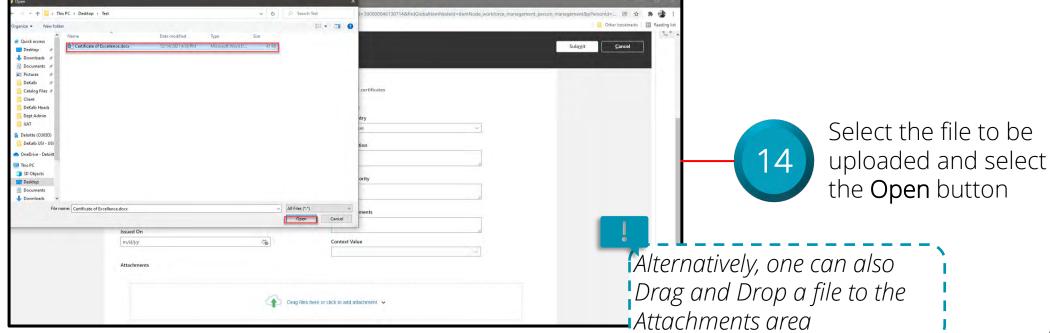




Select the **Drag files here or click to add attachment** link to browse the file to be uploaded

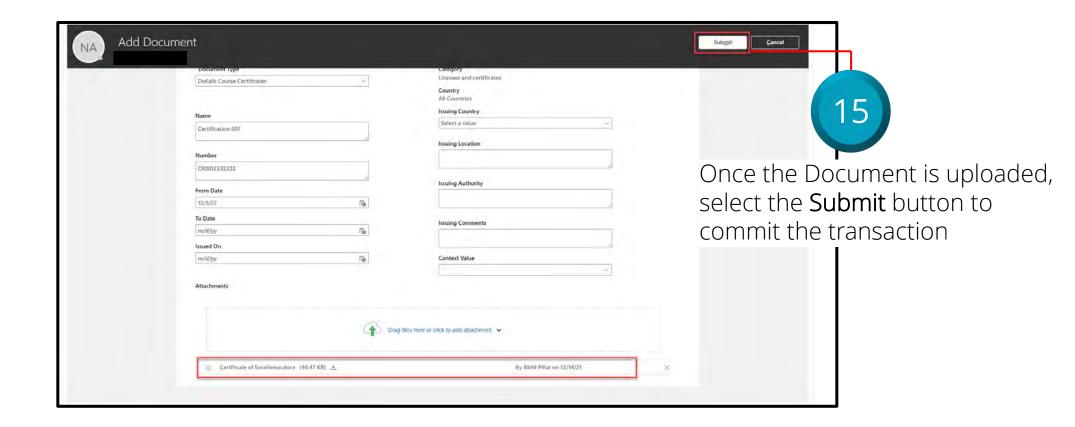




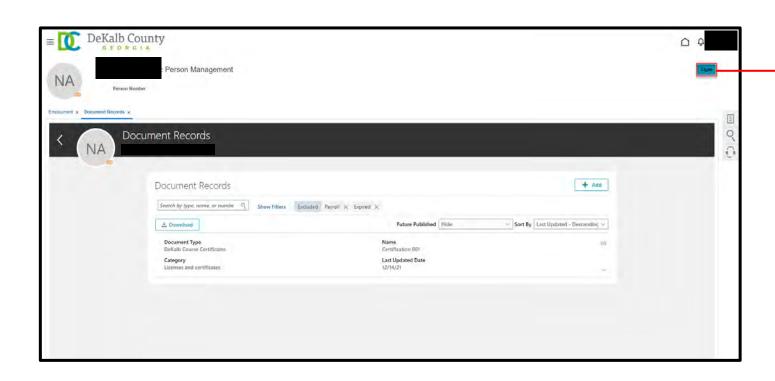












Once the Coordinator has completed reviewing the Document details or there are no Documents, he/she can select the **Close** button

If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 2: Manage Employment Note on View an Employee's Document Delivery Preferences Details



Lesson Objective:



The Payroll Coordinator will not have access to this link even though it is visible within the section

Payroll Coordinators

Lesson 2: Manage
Employment
Section 7: View an Employee's Person
Identifiers for External Application
Details



Lesson Objective:



Upon the completion of the Manage Employment: View an Employee's Person Identifiers for External Application Details lesson, you will be able to:

Objective

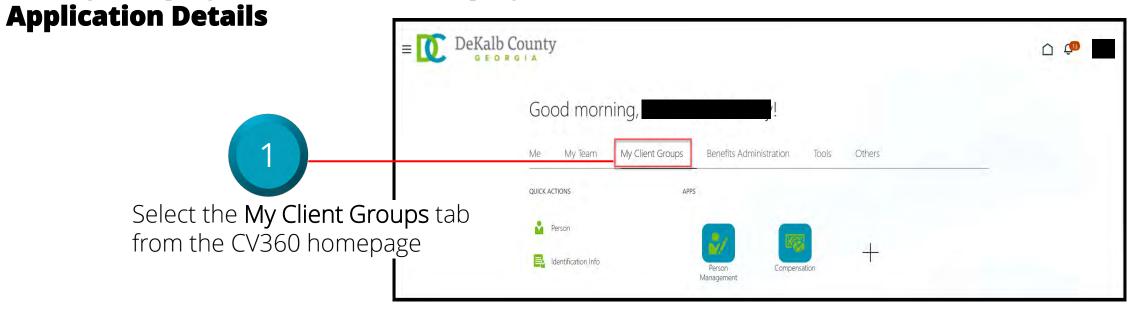
View an Employee's Person Identifiers for External Application Details

!

Person Identifiers for External Application allows an organization to store additional IDs in the system which are typically used for integrations that pass this information to an external Third-Party Vendor or to an internal application requiring this information



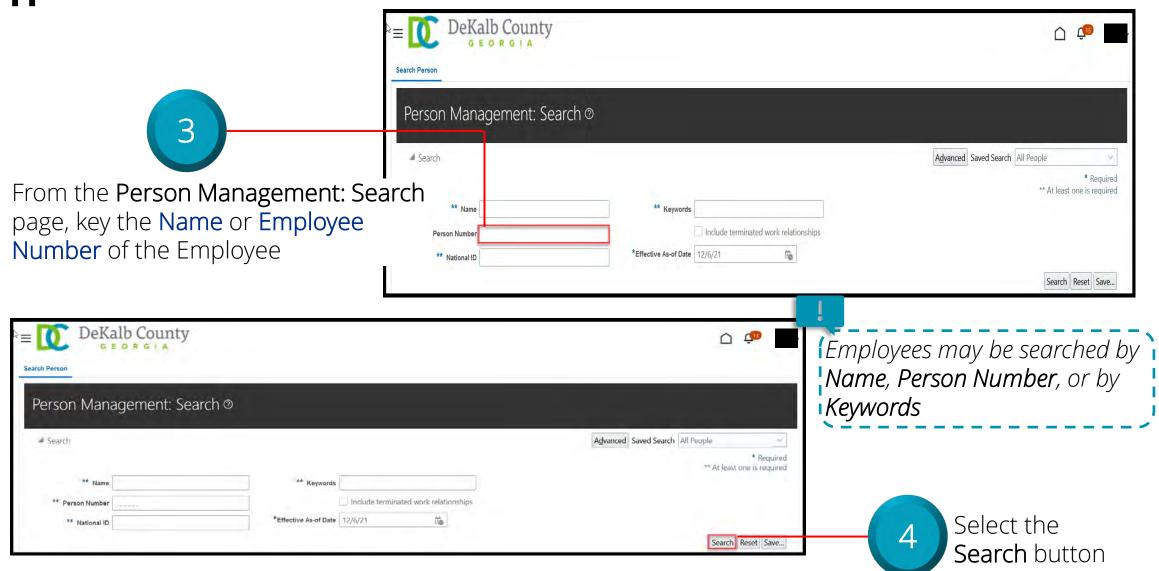
Manage Employment: View an Employee's Person Identifiers for External





Select the **Person Management** tile within the Apps area

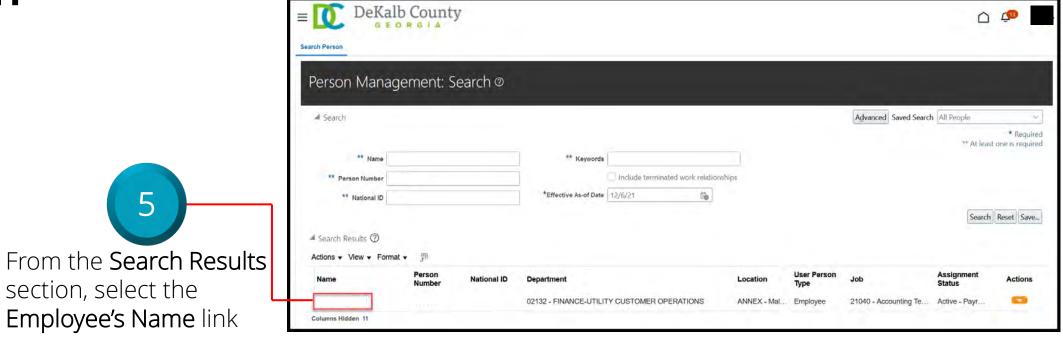






Manage Employment: View an Employee's Person Identifiers for External

Application Details





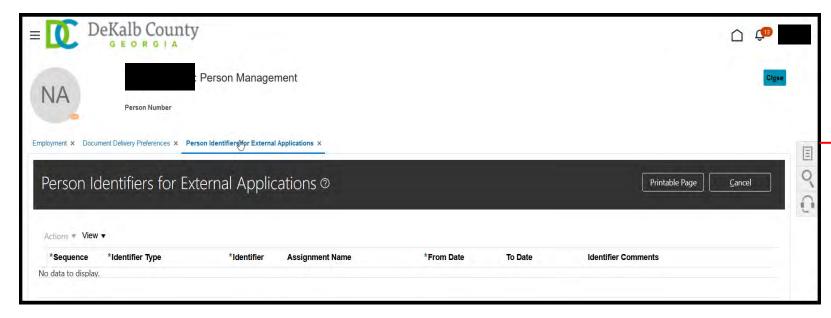




7

Once the Panel Drawer opens, select the Person Identifiers for External Applications link from the Personal and Employment section

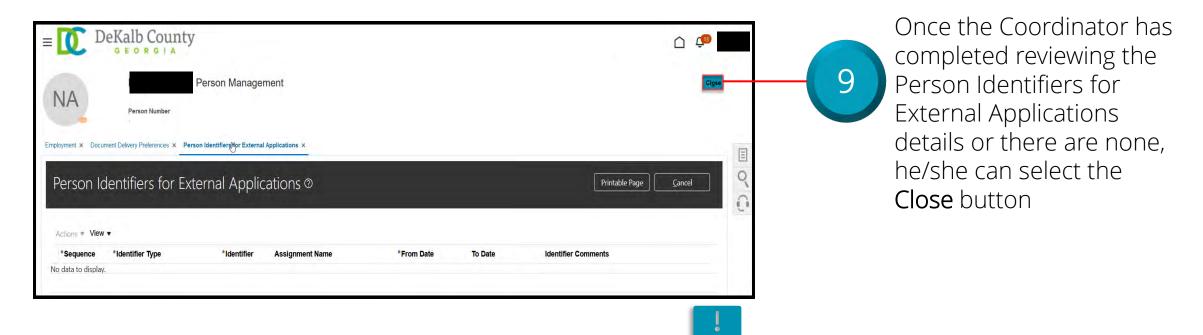




8

From the Person Identifiers for External Applications tab, the Coordinator can review the Identifier Type associated with an Employee. If there are no Identifiers, a note on the page will indicate there is No data to display





If you are not taken directly back to the Person Search page after selecting the Close button, a Warning Message may appear. If it does, select the Yes button to return to the Person Search page



Which of the following is another name for the Latest Start Date?

A. Department Entry Date

B. Position Entry Date

C. Job Entry Date

D. LE Adjusted Service Date





Which of the following is another name for the Latest Start Date?

A. Department Entry Date

B. Position Entry Date

C. Job Entry Date

D. LE Adjusted Service Date



The correct answer is D. LE Adjusted Service Date is another name for the Latest Start Date



Which option is selected from the Panel Drawer to view an Employee's Skills and Qualifications?

A. Seniority Dates

B. Employment

C. Talent Profile

D. Person





Which option is selected from the Panel Drawer to view an Employee's Skills and Qualifications?

A. Seniority Dates

B. Employment

C. Talent Profile

D. Person



The correct answer is C. Talent Profile option is selected from the Panel Drawer to view an Employee's Skills and Qualifications

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View an Employee's Seniority Dates Details

Manage Work Relationship Lifecycle

Lesson 3: Manage Transfers

Section 1: Promotion



Lesson Objective:



Upon the completion of the Manage Transfers: Promotions Lesson you will be able to:

Objectives

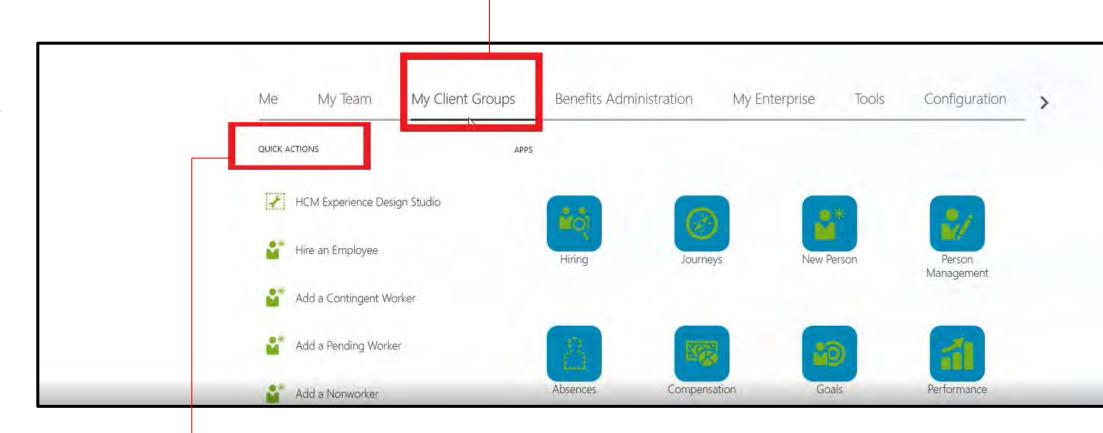
• Promote an Employee

Manage Transfers: Promotion



1

Select the My Client Groups tab

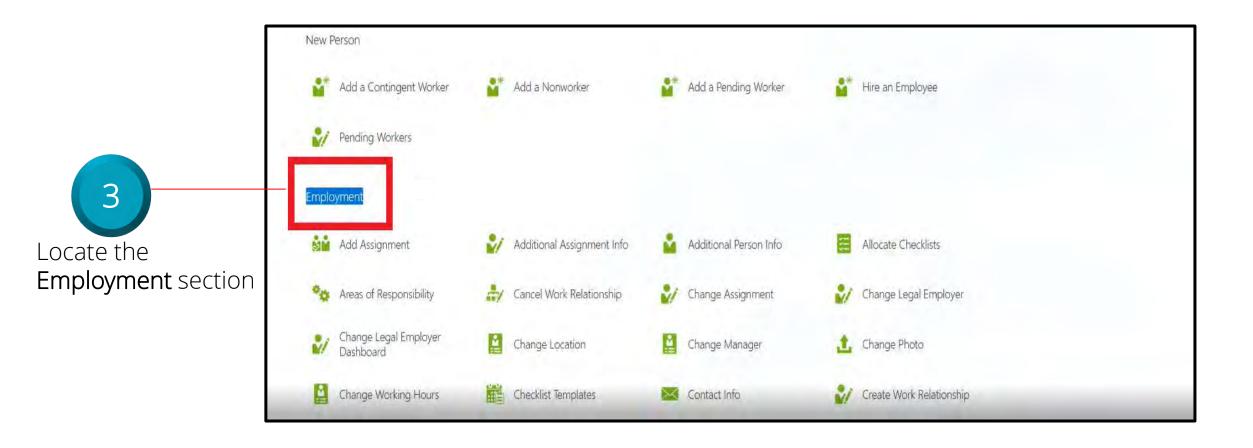


2

Select the **Quick Actions** section and select the **Show More** link from the drop-down list

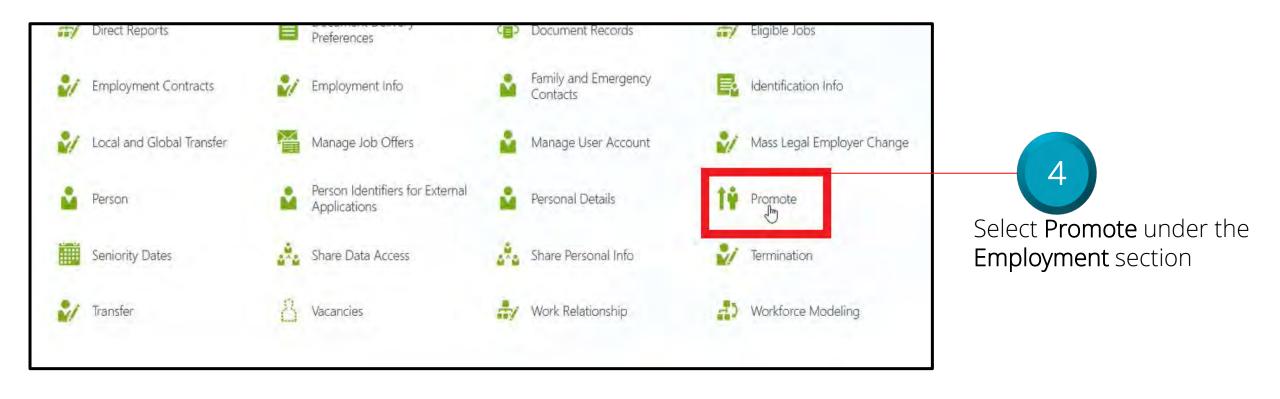
Manage Transfers: Promotion



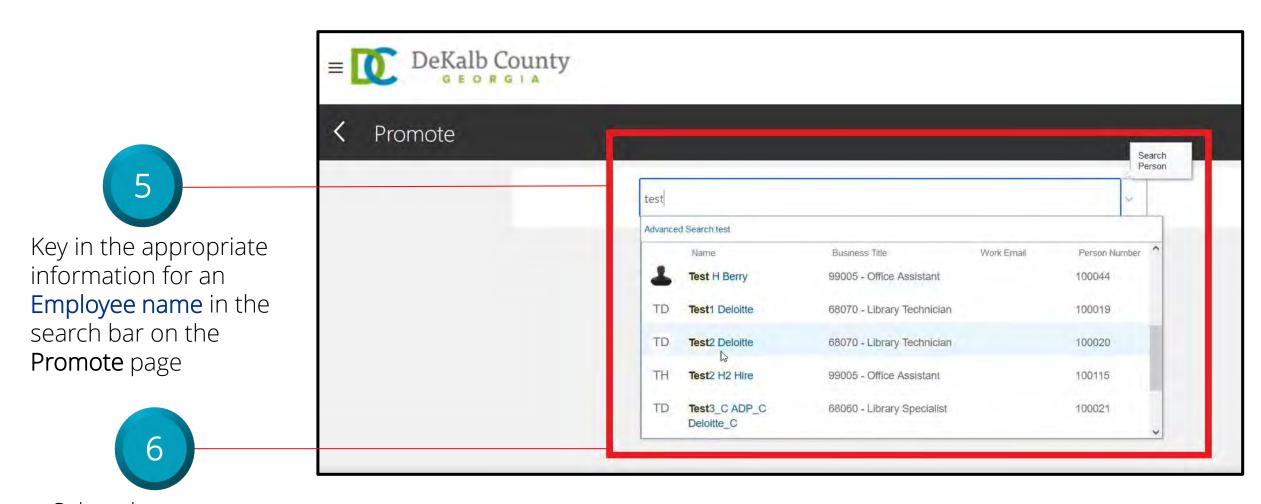


Manage Transfers: Promotion



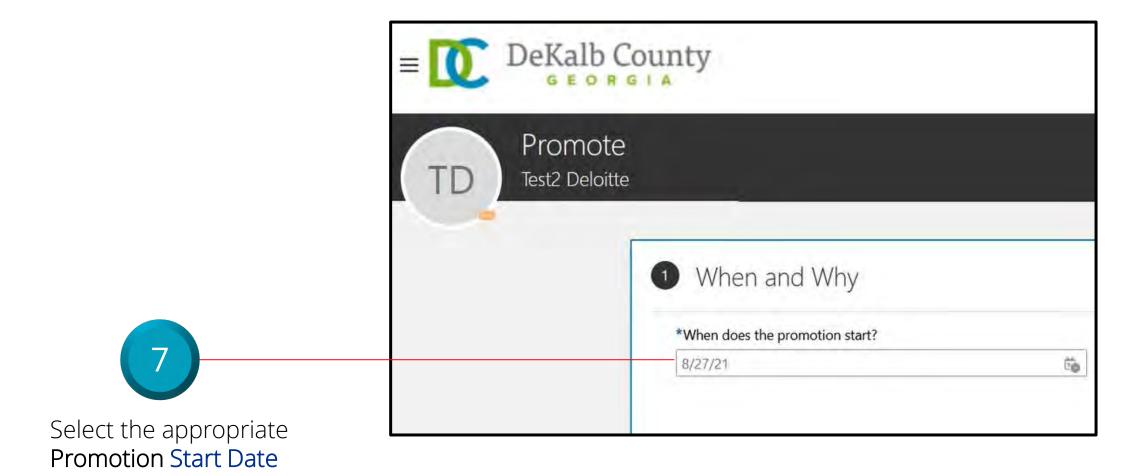




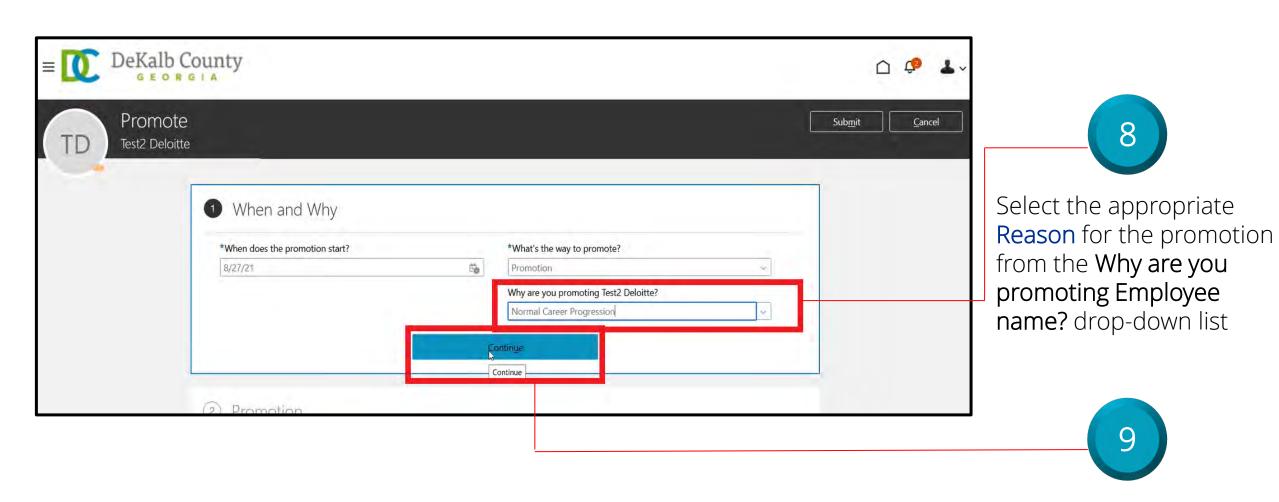


Select the correct **Employee Name** from the drop-down list



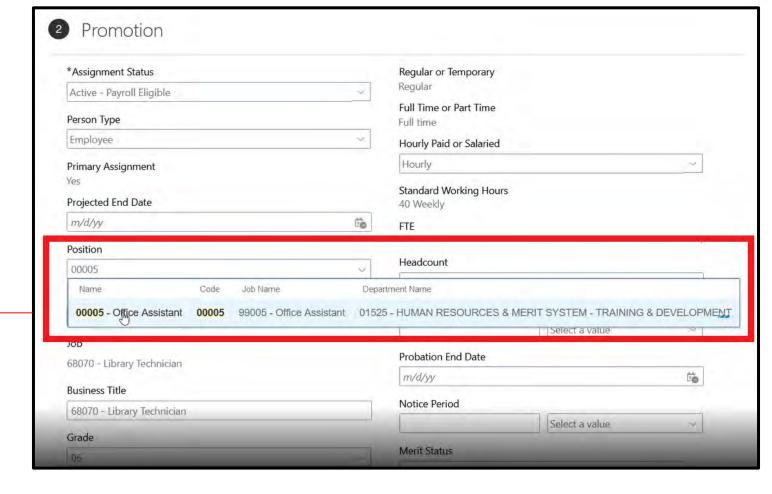






Select the **Continue** button





10

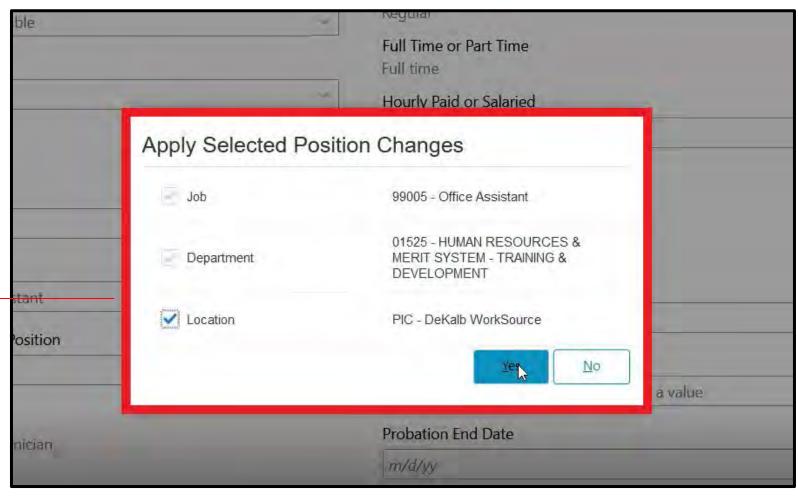
Select the appropriate Position name from the drop-down list

From the Position field, key in the Position name. All Position names start with a code and then the description. When entering the code, the system will intuitively provide a list of Positions that match the data that has been entered. Select the correct Position from the drop-down list





Select the **Yes** button on the **Apply Selected Position** pop-up window



Position synchronization is being used when selecting the Position. You will be prompted with a message to confirm the data elements that have been selected for synchronization. Select **Yes** on the pop-up window



*Synchronize from Position **Probation Period** Yes Select a value Job Probation End Date 99005 - Office Assistant Co. m/d/yy **Business Title** Notice Period 99005 - Office Assistant Select a value Grade Merit Status 06 Department Company 01525 - HUMAN RESOURCES & MERIT SYSTEM - TRAINING & DEVELOPMENT Division Code Worker Category Select a value AD Account Required? Assignment Category Full-time regular Continue

12

Once all the necessary information has been completed under the **Promotion** section, select the **Continue** button



13

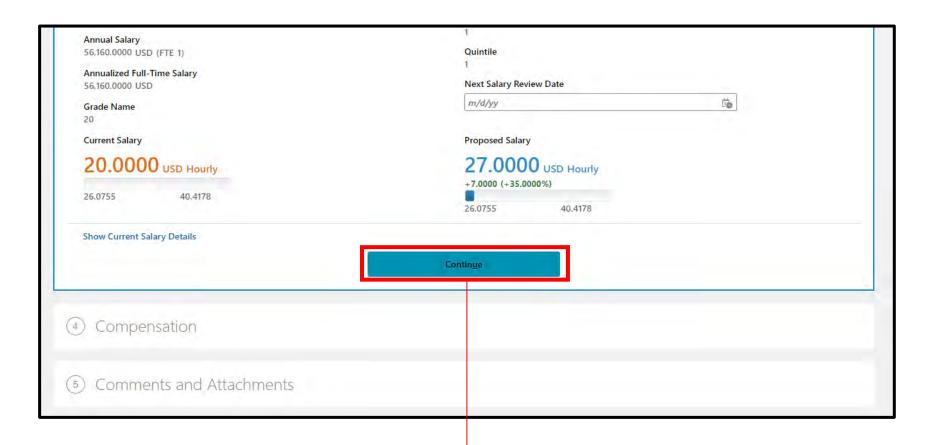
Key in the appropriate Base Salary and Hazardous Duty amount on the Salary section



If the Promotion comes with a Salary change, edit the amount in the **Salary Amount** field or key in an adjustment amount in the **Adjustment Amount** field. Based on which field is entered (Salary Amount or Adjustment Amount), the other field will be updated to reflect what was entered. If the Salary Amount was entered, then the Adjustment Amount will be updated with the different between the Current Amount and the newly proposed amount





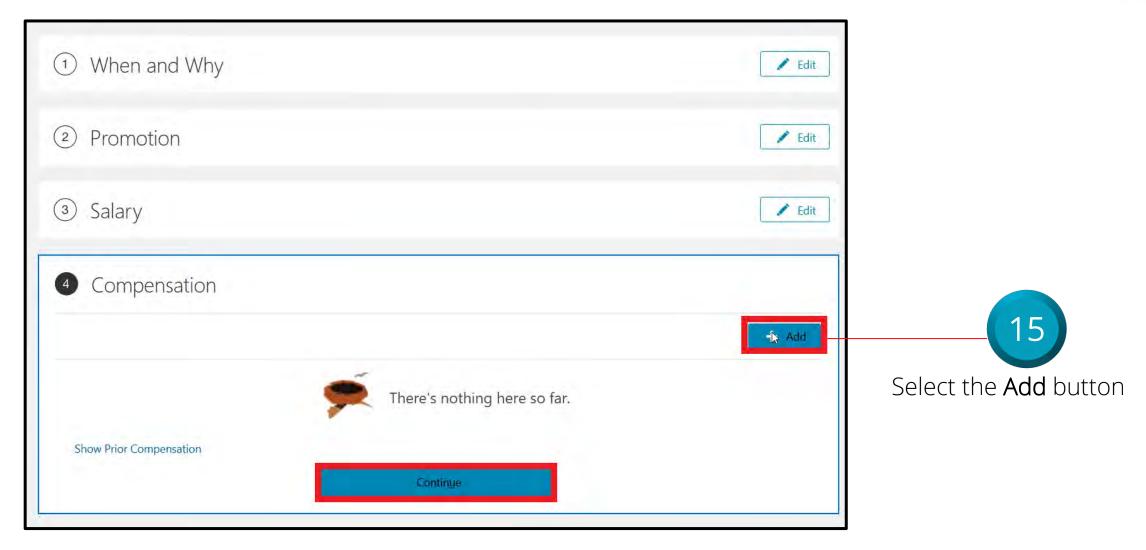


14

The revised salary will be reflected on the Salary page. Select the **Continue** button to save the changes and proceed to the next step

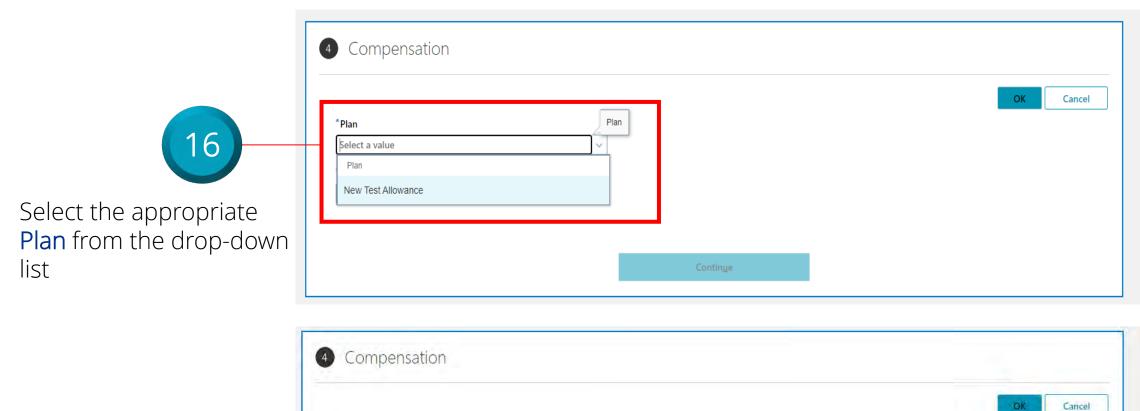












New Test Allowance

Option from the dropdown list

Plan

New Test Allowance

Option

New Test Allowance

Option

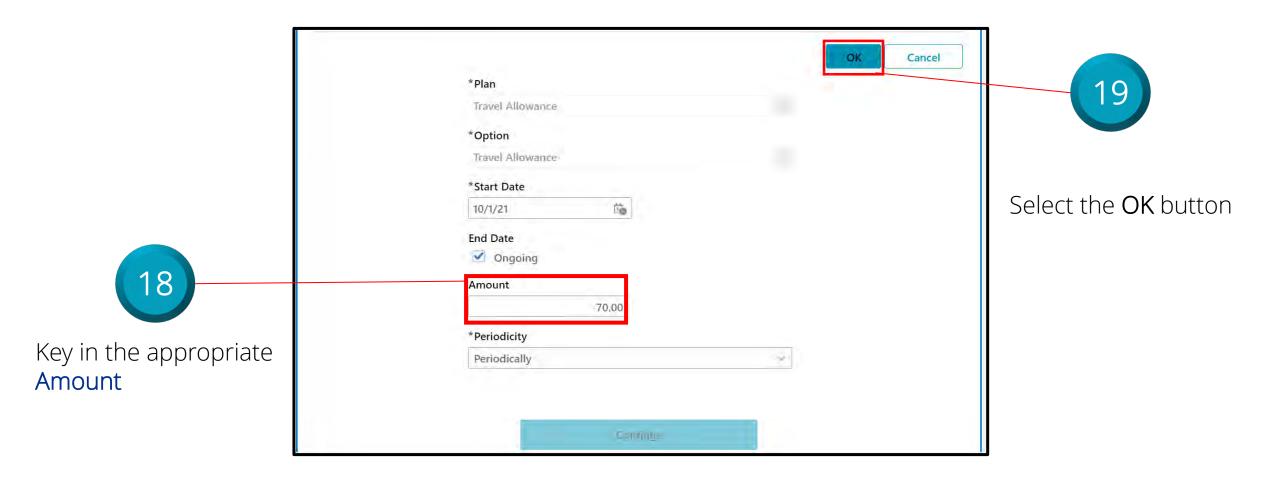
New Test Allowance

Option

New Test Allowance

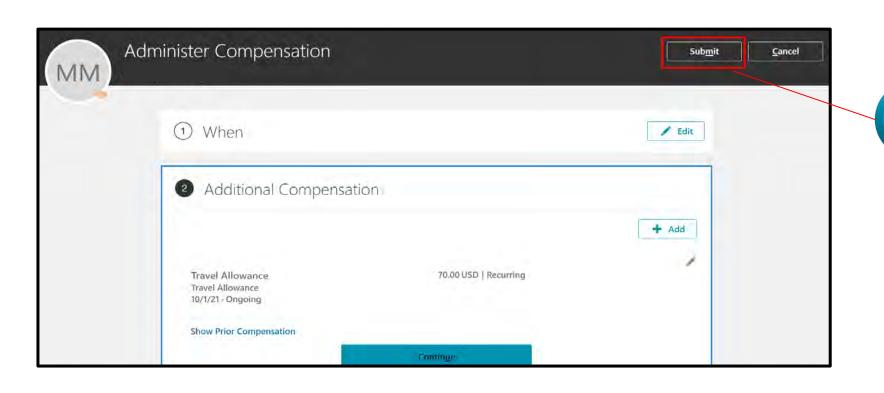










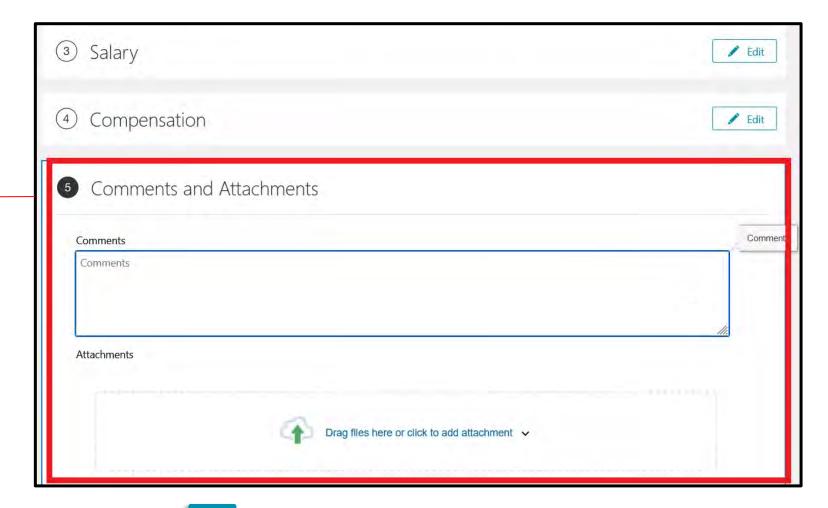


Select the **Submit** button



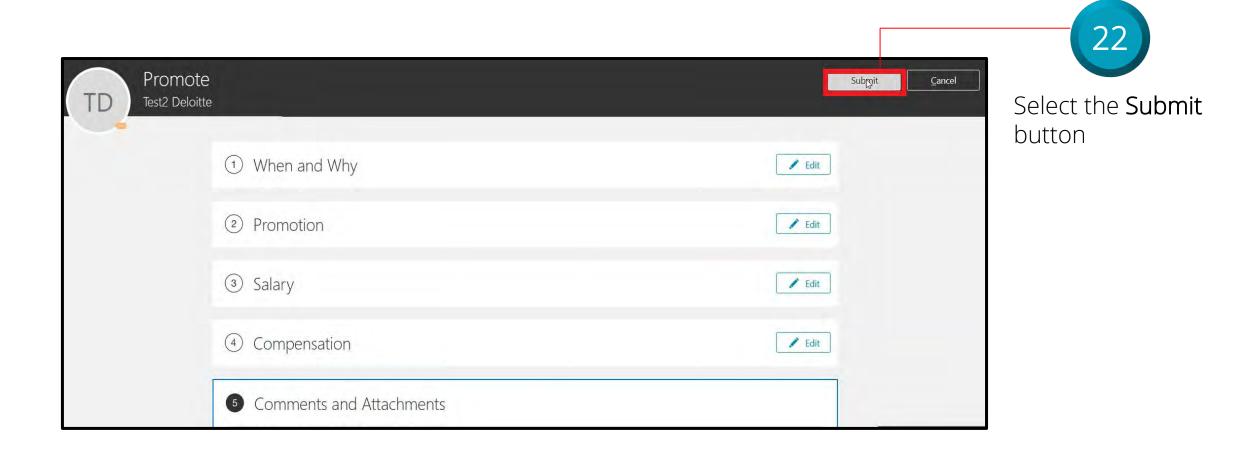
21

Key in the appropriate details in the Comments section and add the required Attachments for the Approver as needed



Attachments may be selected from the file, or they can be dragged and dropped into the **Attachments** section





Manage Work Relationship Lifecycle

Lesson 3: Manage Transfers

Section 2: Demotion



Lesson Objective:



Upon the completion of the Manage Transfers: Demotions Lesson you will be able to:

Objective

• Demote an Employee



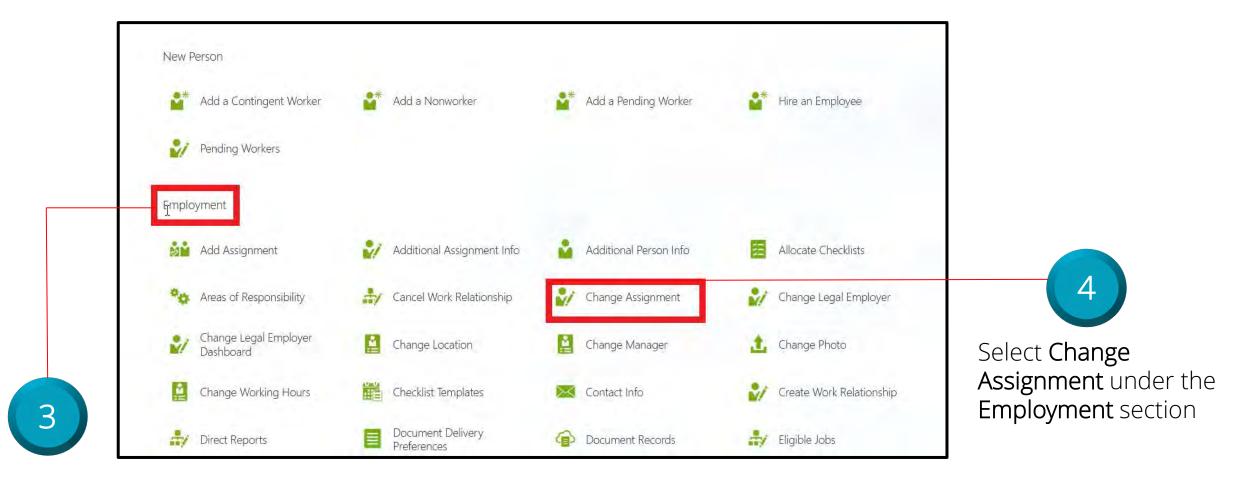
1

Select the My Client Groups tab



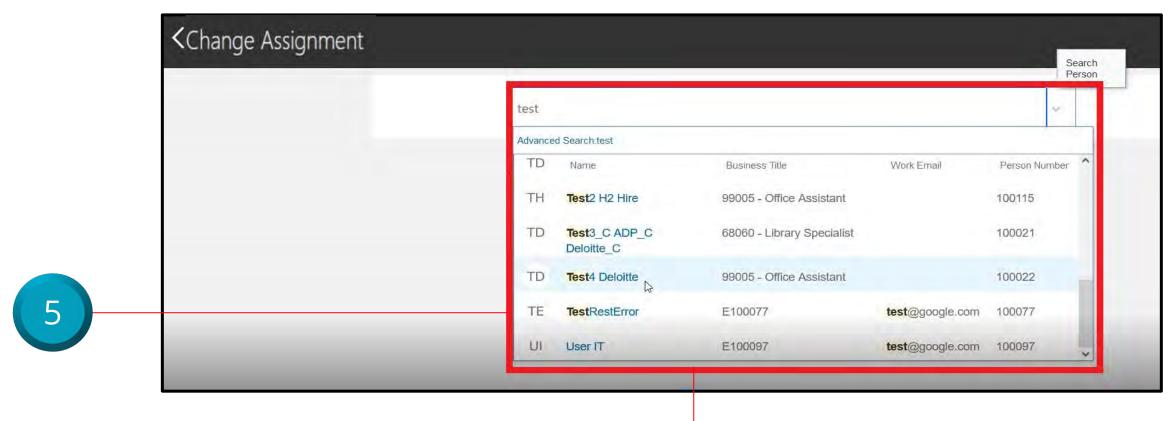
Select the Quick Actions section and select the Show More link from the drop-down list





Locate the **Employment** section





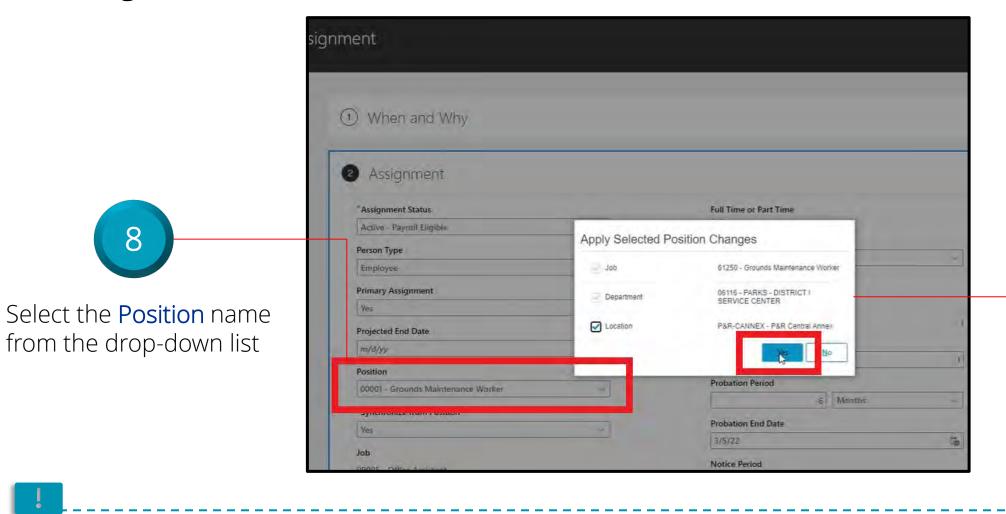
From the Search for a Person field, Key in the Employee's Name or Employee Number Select the
Employee from the returned results within the Recent Items list

button



DeKalb County Change Assignment Submit Key in the appropriate Assignment Change When and Why Start Date in the When does the "When does the assignment change start? Why are you changing the assignment? fè. voluntary Demotion 9/8/21 assignment change "What's the way to change the assignment? Why are you making changes to direct reports? start? field Demotion Select **Demotion** from (2) Assignment the What's the way to change the assignment? drop-down list Select either Voluntary Demotion or **Involuntary Demotion** from the Why are you changing the assignment? Select the Continue drop-down list





From the Position field, key in the Position name. All Position names start with a code and then the description. When entering the code, the system will intuitively provide a list of Positions that match the data that has been entered. Select the correct Position from the drop-down list

Select the **Yes** button



10

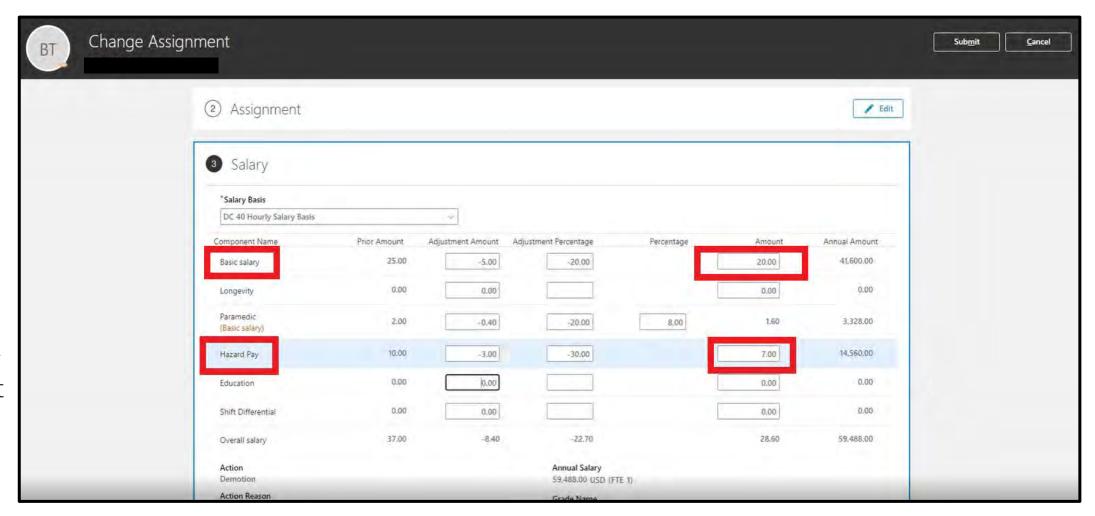
Once all the necessary information has been completed under the Change Assignment section, select the Continue button

00001 - Grounds Maintenance Worker	Probation Period			
*Synchronize from Position	6 Months			
Yes	Probation End Date			
Job	3/5/22			
61250 - Grounds Maintenance Worker	Notice Period			
Business Title	Select a value &			
61250 - Grounds Maintenance Worker	Merit Status Y			
Grade	Company			
06	001			
Reporting Establishment	Division Code			
DeKalb County GA	01500 - HUMAN RESOURCES & MERIT SYSTEM			
Worker Category	AD Account Required?			
White collar	Yes			
Assignment Category	Additional Employment			
Full-time regular	A			
Regular or Temporary Regular				
	Camingo			

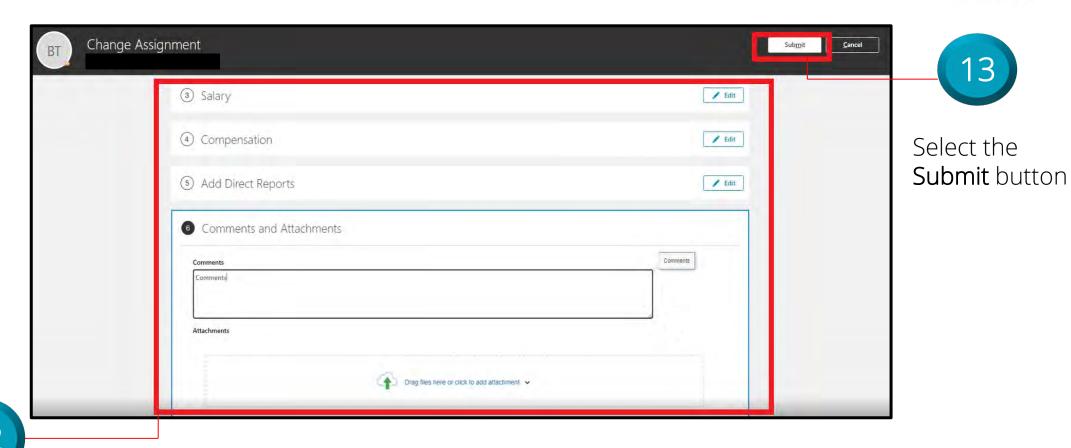




Make the appropriate adjustments to the Basic Salary and Hazard Pay fields and select the Continue button







Key in the appropriate details in the **Comments** section and add the required **Attachments** for the Approver, if necessary

Manage Work Relationship Lifecycle

Lesson 3: Manage Transfers

Section 3: Transfers





1

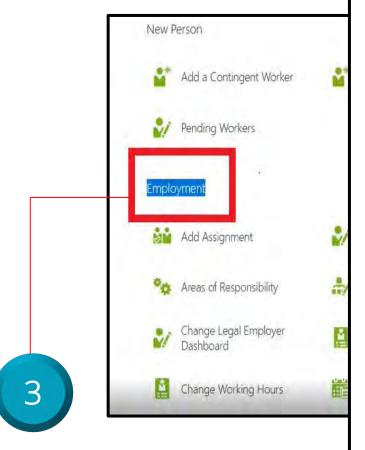
Select the My Client Groups tab



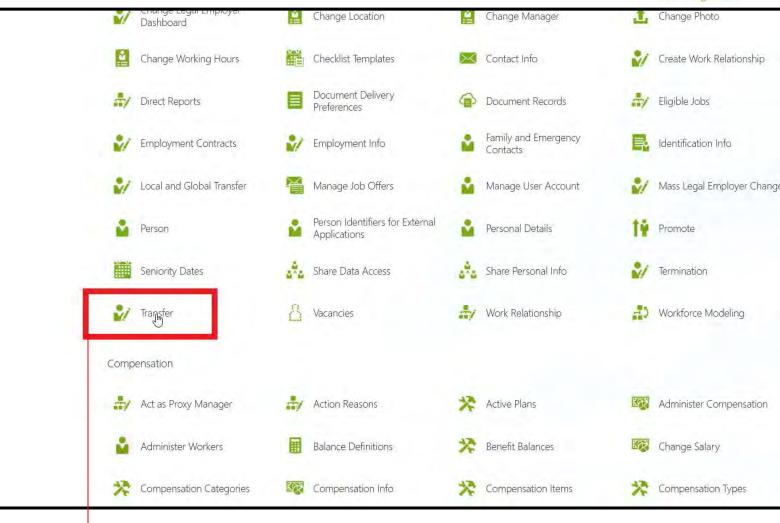
2

Select the **Quick Actions** section and select the **Show More** link from the drop-down list



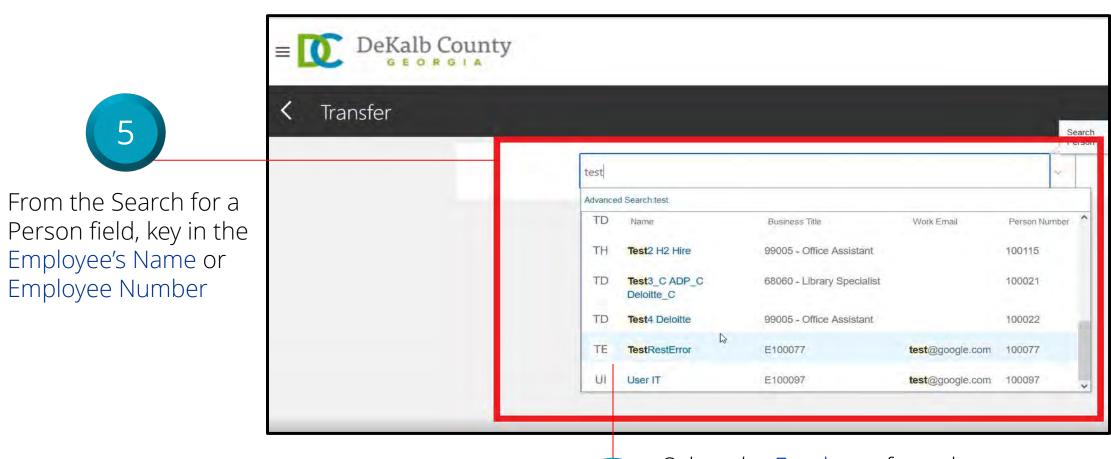


Locate the **Employment** section



Select **Transfer** under the **Employment** section





Select the Employee from the returned results within the Recent Items list

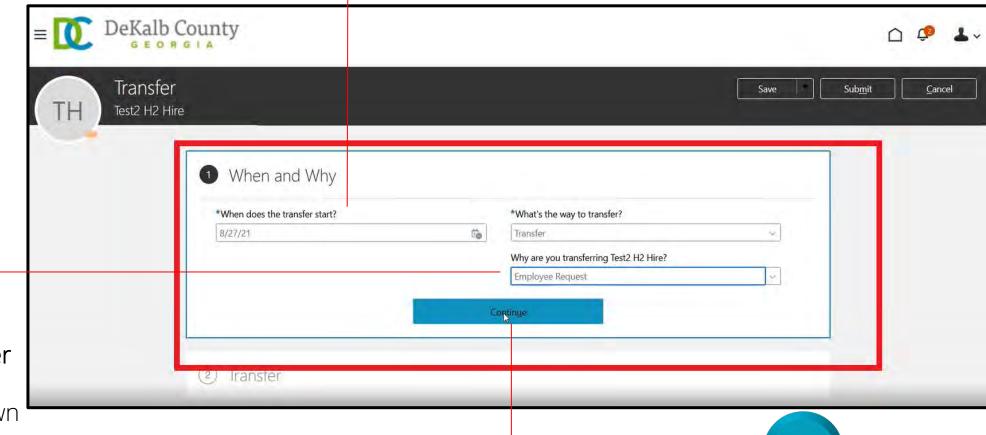


7

Key in the appropriate Transfer Start Date in the When does the transfer start? field

8

Select the appropriate
Reason for the Transfer
from the Why are you
transferring? drop-down
list



Select the **Continue**

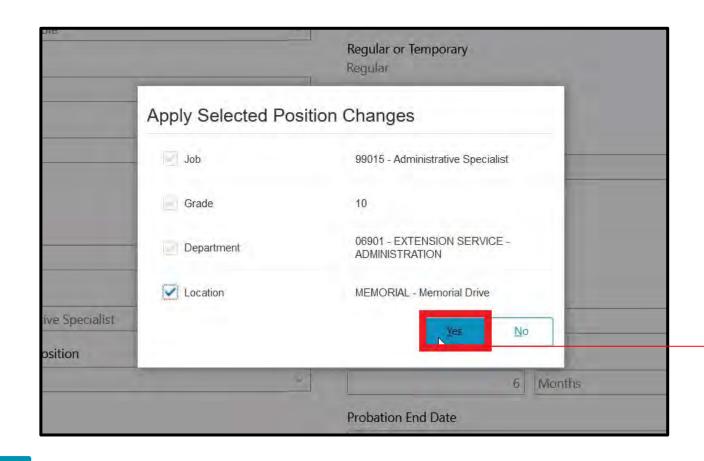
button



	*Assignment Status		Assignment Category					
	Active - Payroll Eligible		Full-time regular Regular or Temporary Regular					
	Person Type							
	Employee	141	Full Time or Part Time					
	*Business Unit DC Business Unit Primary Assignment Yes Projected End Date		Full time Hourly Paid or Salaried Salaried Standard Working Hours 40 Weekly					
					m/d/vv	Č.	FTE	
					9	Position		Headcount
		00006	×.		1			
elect the Position	Name Code Job Na	me	Department Name					
name from the drop-	00006 - Administrative Specialist № 00006 99015 - Administrative Specialist 06901 - EXTENSION SERVICE - ADMINISTRATION							
lown list	300		Propation and Date					
	99005 - Office Assistant		2/22/22	Tie.				

From the Position field, key in the Position name. All Position names start with a code and then the description. When entering the code, the system will intuitively provide a list of Positions that match the data that has been entered. Select the correct Position from the drop-down list





Select the **Yes** button in the pop-up window to apply the transfer changes

Position synchronization is being used when selecting the Position. You will be prompted with a message to confirm the data elements that have been selected for synchronization. Select **Yes** on the pop-up window



Key in the appropriate details in the Comments section and add the required Attachments for the Approver, if necessary

Transfer Submit Cancel Save TH Test2 H2 Hire 1 When and Why / Edit Select the Submit (2) Transfer / Edit button 3 Salary / Edit Compensation / Edit Comments and Attachments

If there is a **Salary Change** based on the **Transfer**, edit Section 3 and 4 for Salary and Compensation. If no Salary Change is needed, these sections can be skipped



The process in which an Employee is moved from one existing **Position** to a higher **Position** is known as:

A. Promotion

B. Job Change

C. Department Change

D. Location Change





The process in which an Employee is moved from one existing **Position** to a higher **Position** is known as:

A. Promotion

B. Job Change

C. Department Change

D. Location Change



The correct answer is A. The process in which an Employee is moved from their current assigned Position to a higher Position is known as a Promotion



Which of the following details must be updated in CV360 when promoting an Employee?

A. Salary

B. Promotion

C. Compensation

D. All of the above





Which of the following details must be updated in CV360 when promoting an Employee?

A. Salary

B. Promotion

C. Compensation

D. All of the above



The correct answer is D. Salary, Promotion, and Compensation must be updated in CV360 when promoting an Employee

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• Demote and Transfer an Employee

Payroll Coordinators

Lesson 4: Manage Absence

Section 1: View Absence Records





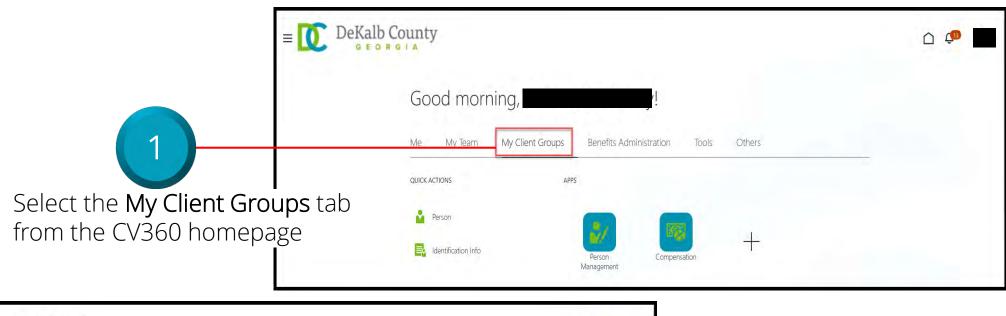


Upon the completion of the Manage Absence lesson, you will be able to:

Objective

- View an Employee's Absence Records Details
- Submit an Absence Request
- Withdraw an Absence Request







Select the **Person Management** tile within the Apps area

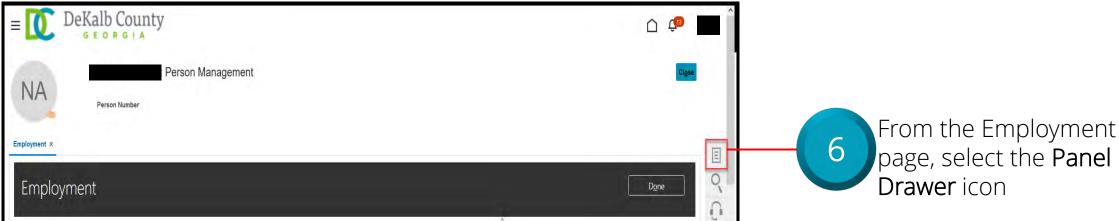




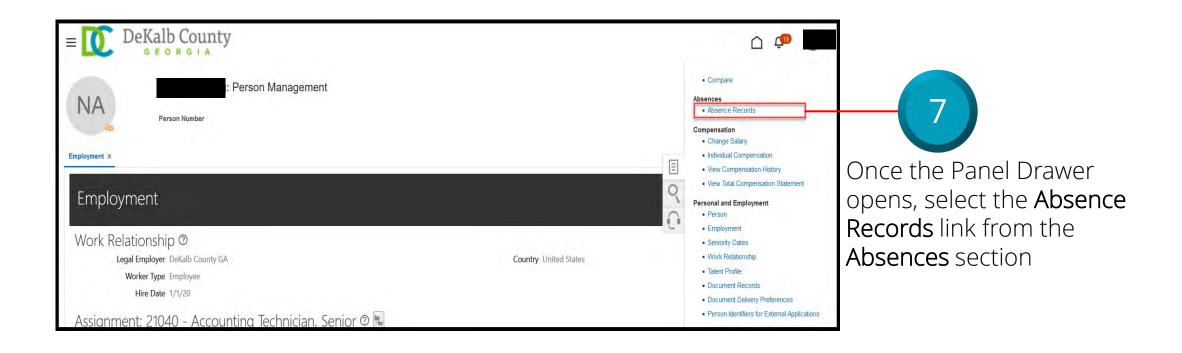






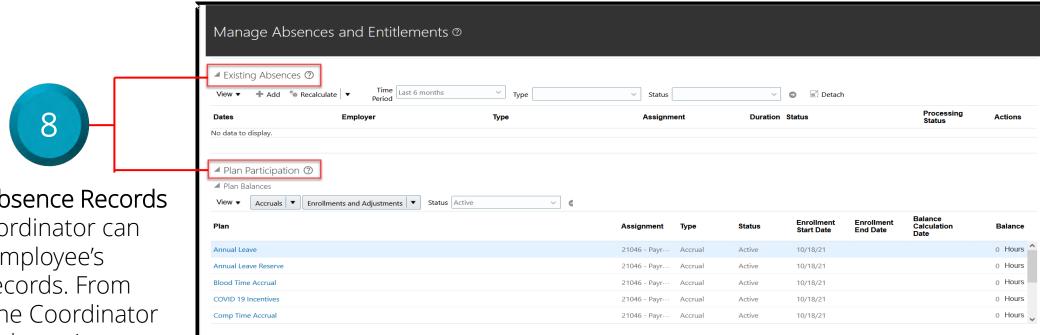






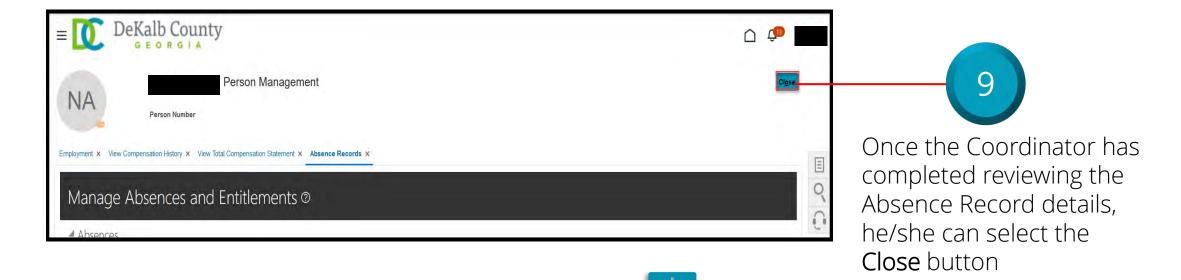






From the Absence Records tab, the Coordinator can review an Employee's Absence Records. From this page, the Coordinator would be able to view Existing Absences and Plan Participation along with corresponding Balances





If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Manage Absence: Knowledge Check



To view Absence Records details, the Payroll Coordinator should select the Person Management tile from the Apps area.

True or False?

A. True

B. False



Manage Absence: Knowledge Check



To view Absence Records details, the Payroll Coordinator should select the Person Management tile from the Apps area.

True or False?





The correct answer is A. To view Absence Records details, the Payroll Coordinator should select the Person Management tile from the Apps area

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View Absence Record for an Employee

Absence Coordinators

Lesson 4: Manage Absence

Section 2: Submit an Absence Request



Lesson Objective:



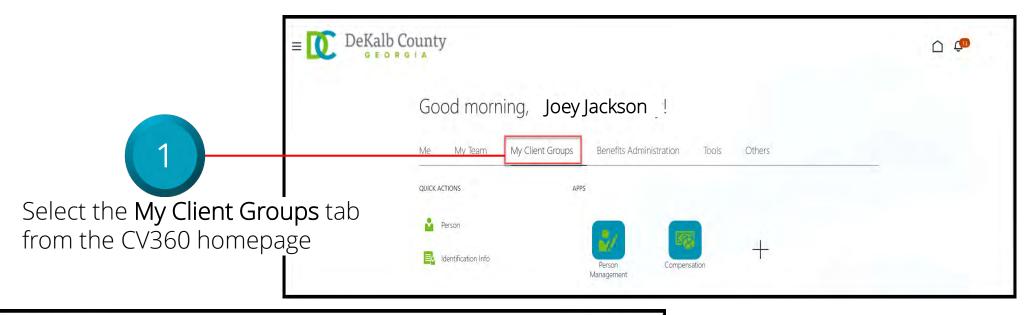
Upon the completion of the Submit an Absence lesson, you will be able to:

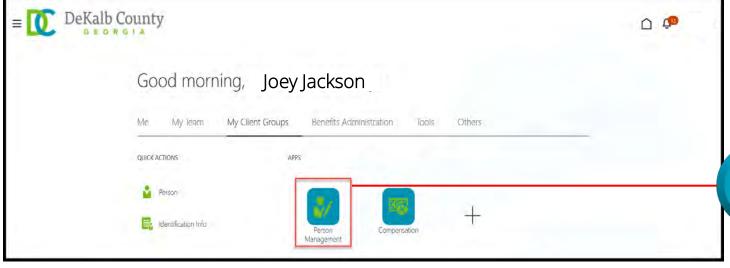
Objective

• Submit an Absence Request for an Employee







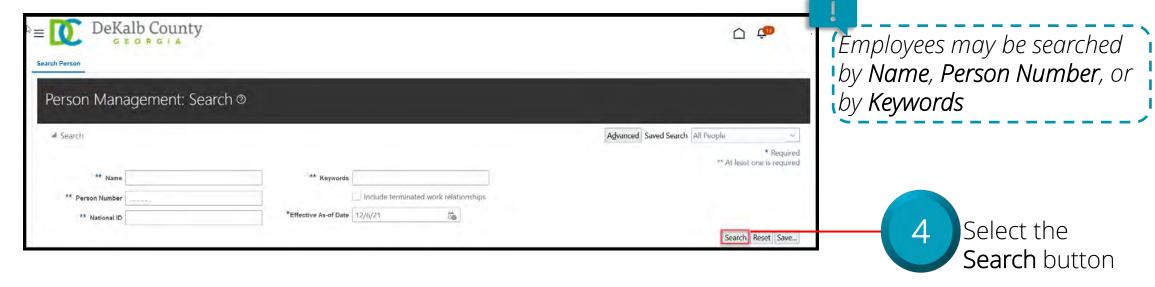


Select the **Person Management** tile within the Apps area





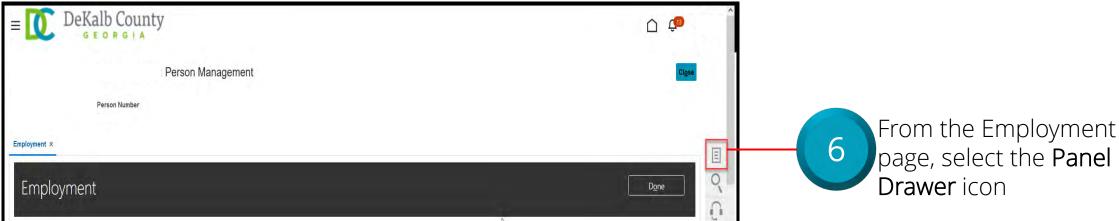






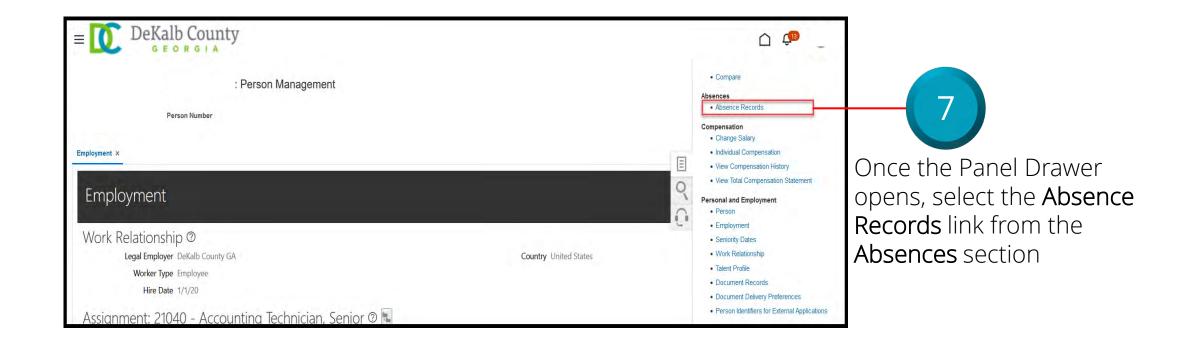






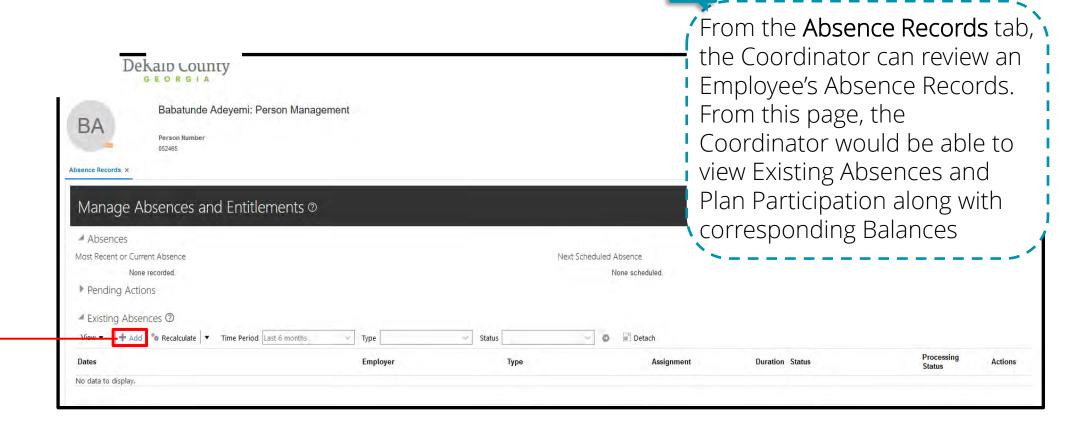
Submit an Absence Request





Submit an Absence Request

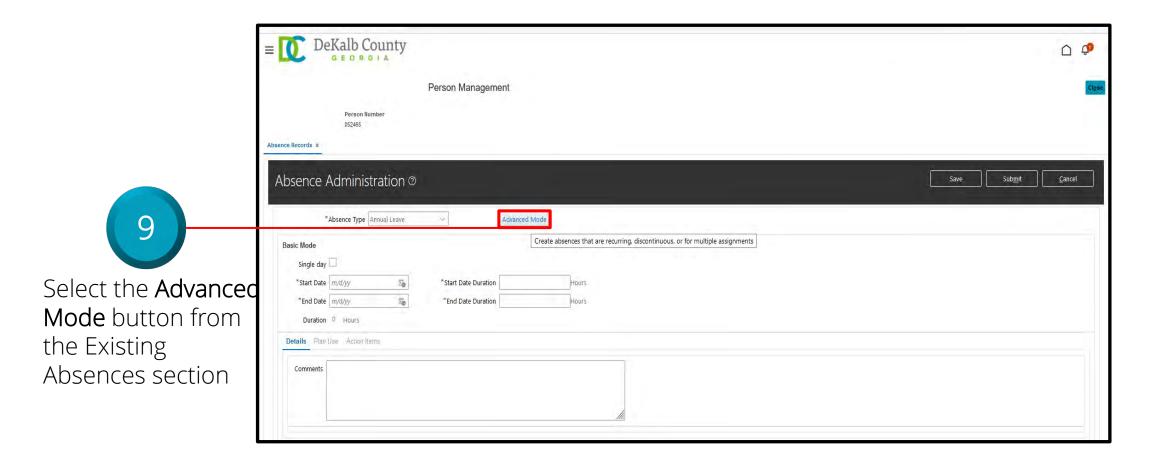




Select the **Add** button from the Existing Absences section

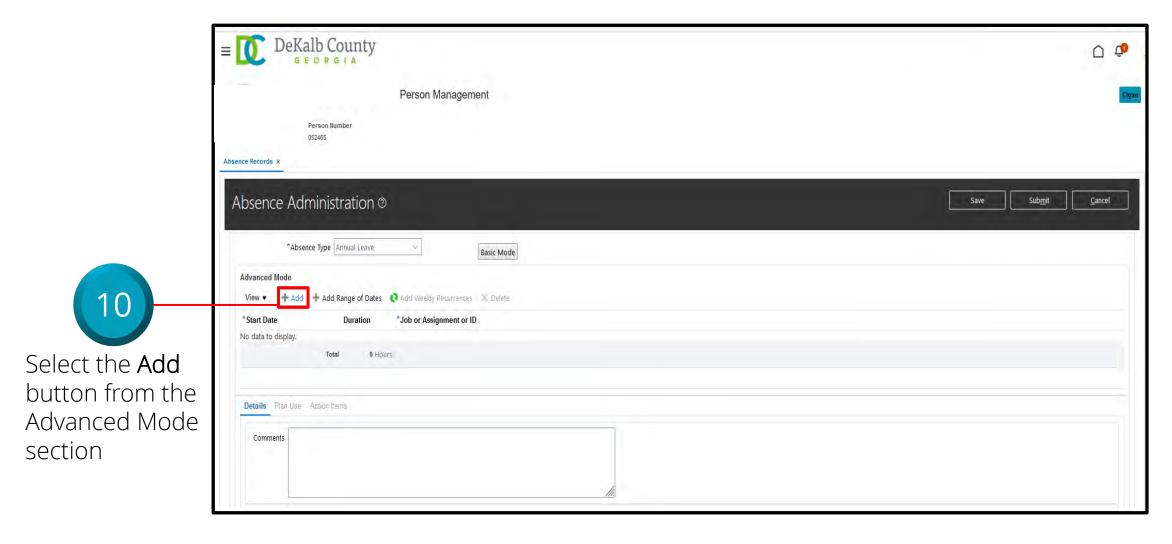






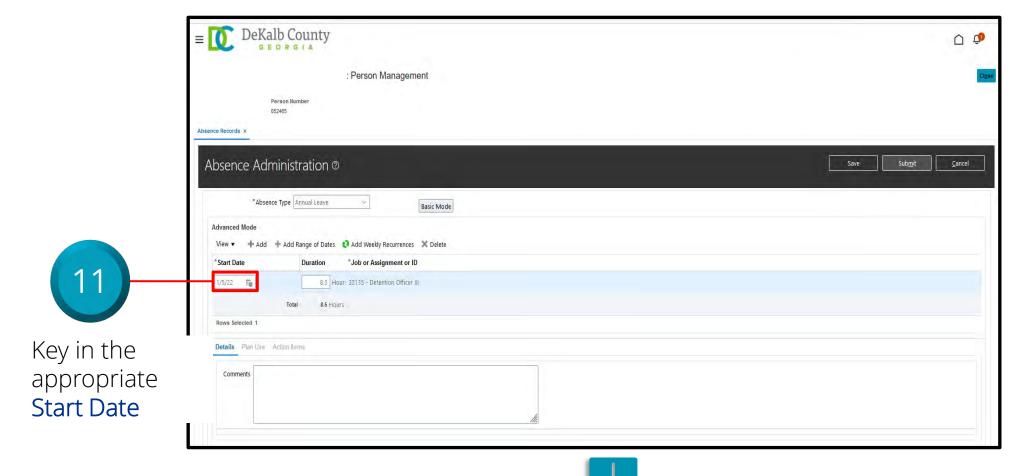










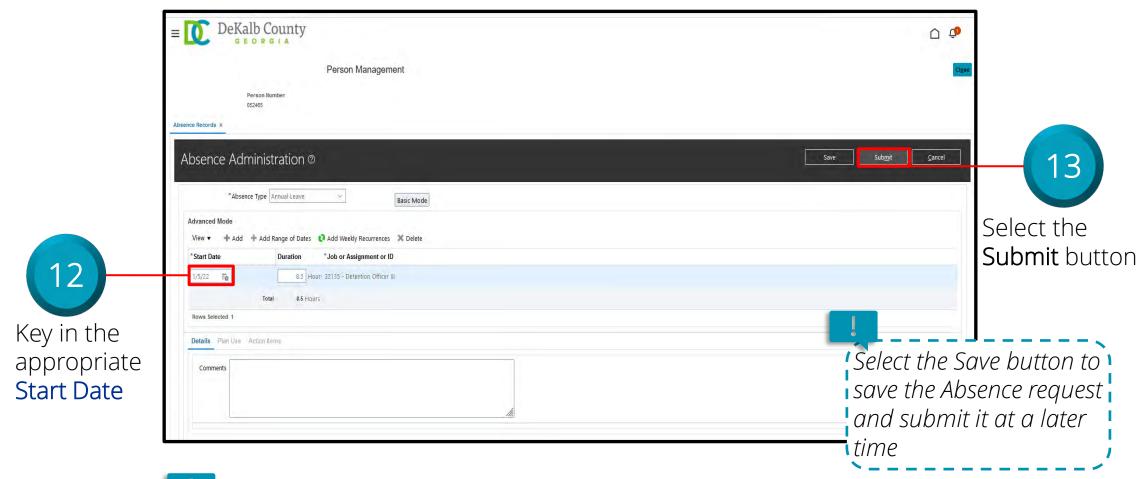


The Duration field will auto populate.

Absence Coordinators have the option to change the absence duration.

Submit an Absence Request

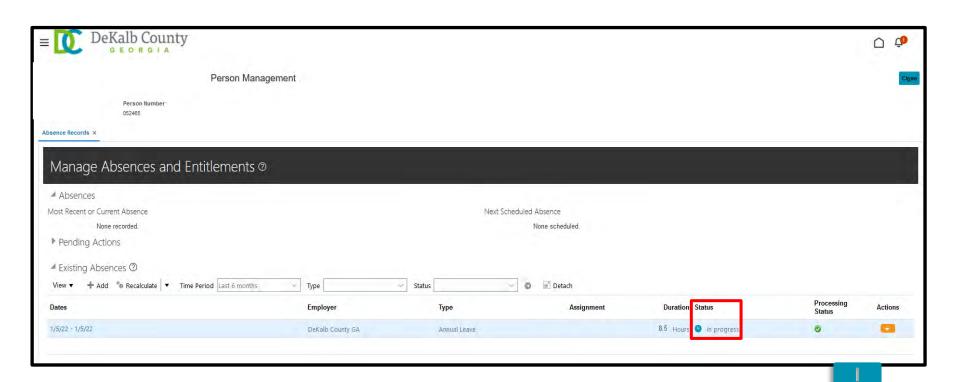




The Duration field will auto populate







The status of the
Absence request will
display under the
Existing Absences section

Submit an Absence Request: Knowledge Check



The Absence Coordinator is required to key in the Duration for an Absence request. *True or False?*

A. True

B. False



Submit an Absence Request: Knowledge Check



The Absence Coordinator is required to key in the Duration for an Absence request. *True or False?*

A. True

B. False



Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View an Employee's Absence Record

Absence Coordinators

Lesson 4: Manage Absence

Section 3: Withdraw an Absence Request



Lesson Objective:



Upon the completion of the Withdraw a Absence Request lesson, you will be able to:

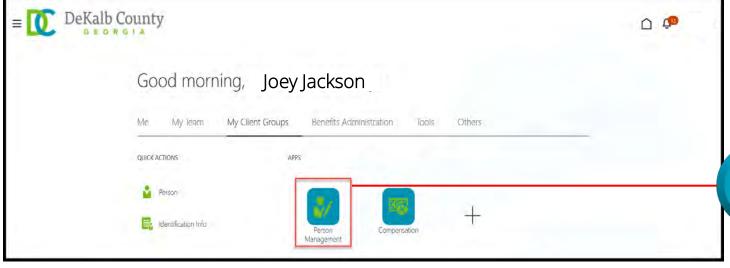
Objective

• Withdraw Absence Requests for an Employee







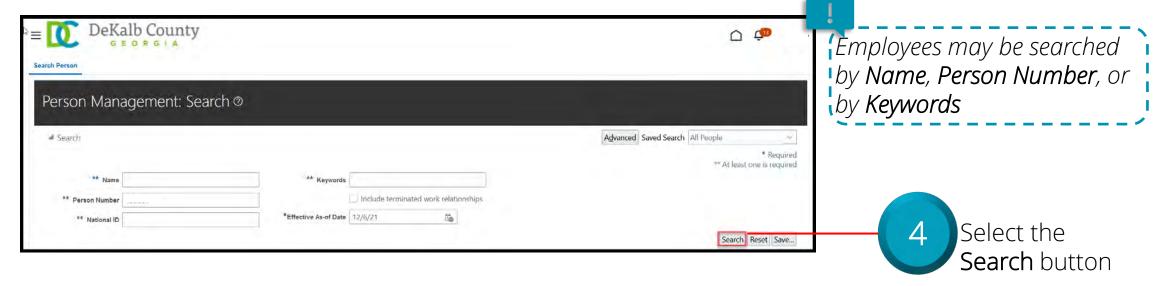


Select the **Person Management** tile within the Apps area





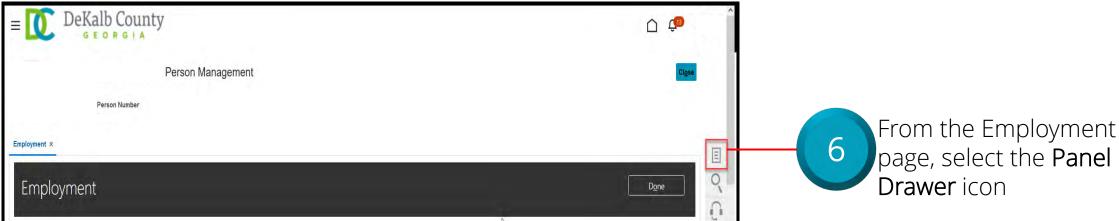






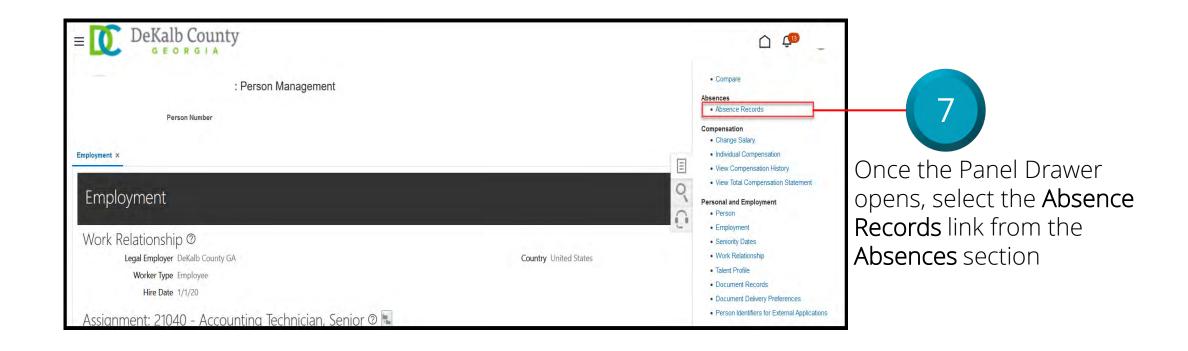






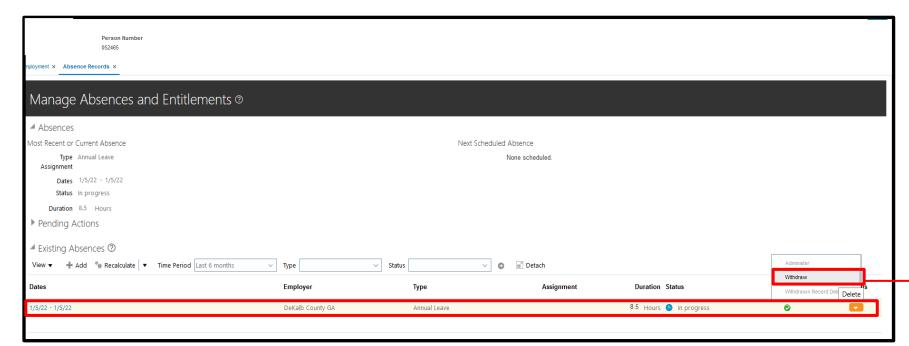
Withdraw a Absence Request







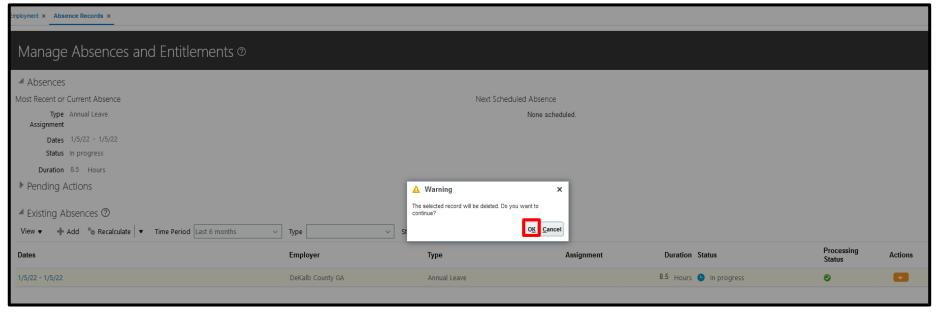




Highlight the appropriate
Absence request that
needs to be withdrawn and
select Withdraw from the
Actions drop-down list for



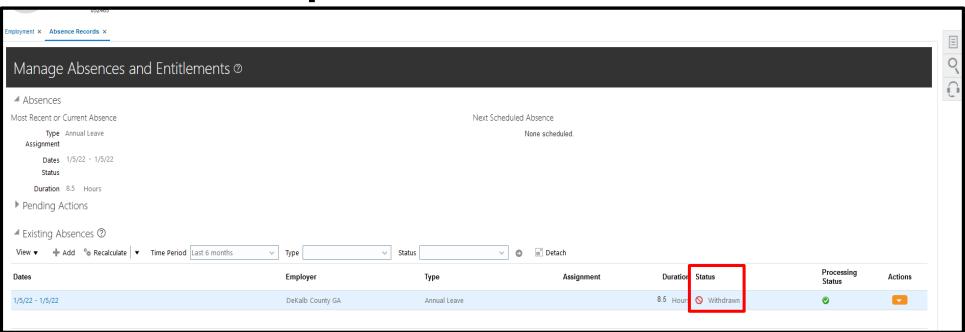




Select the **OK** button in the pop-up window to withdraw the Absence request







The status of the
Absence request will
display under the
Existing Absences section

Withdraw a Absence Request: Knowledge Check



Absence Coordinators can withdraw an existing Absence request by selecting Delete from the Actions drop-down list.

True or False?

A. True

B. False



Withdraw a Absence Request: Knowledge Check



Absence Coordinators can withdraw an existing Absence request by selecting Delete from the Actions drop-down list.

True or False?

A. True

B. False



Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• Withdraw an Employee's Absence Request

Payroll Coordinators

Lesson 5: Manage Compensation







Upon the completion of the Manage Compensation lesson, you will be able to:

Objectives

- View and Update an Employee's Salary
- View an Employee's Compensation through Individual Compensation Plans
- Award Compensation to an Employee through Individual Compensation Plans
- View an Employee's Compensation History
- View an Employee's Total Compensation Statement (When Available)

Payroll Coordinators

Lesson 5: Manage
 Compensation
 Section 1: View an Employee's Salary



Lesson Objective:



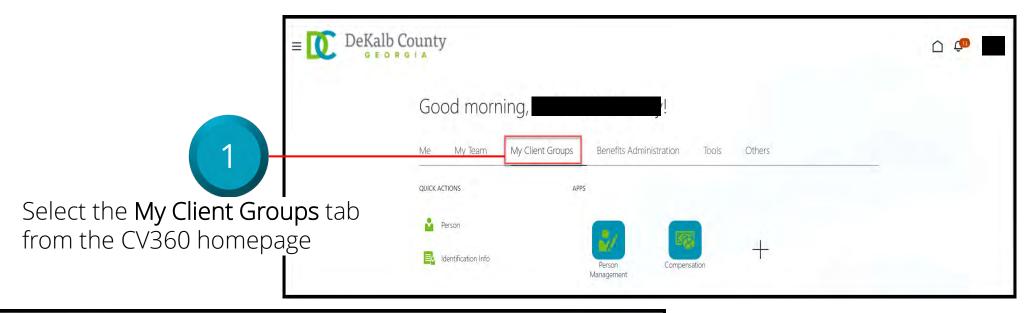
Upon the completion of the Manage Compensation: View an Employee's Salary lesson, you will be able to:

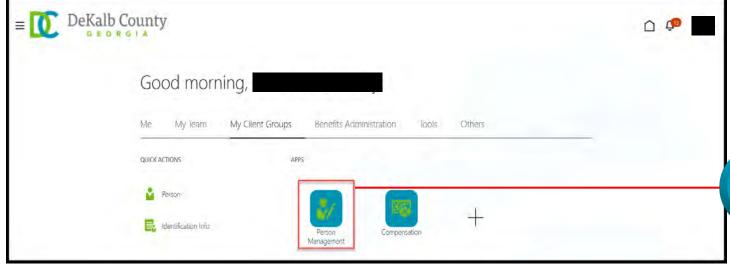
Objective

• View an Employee's Salary





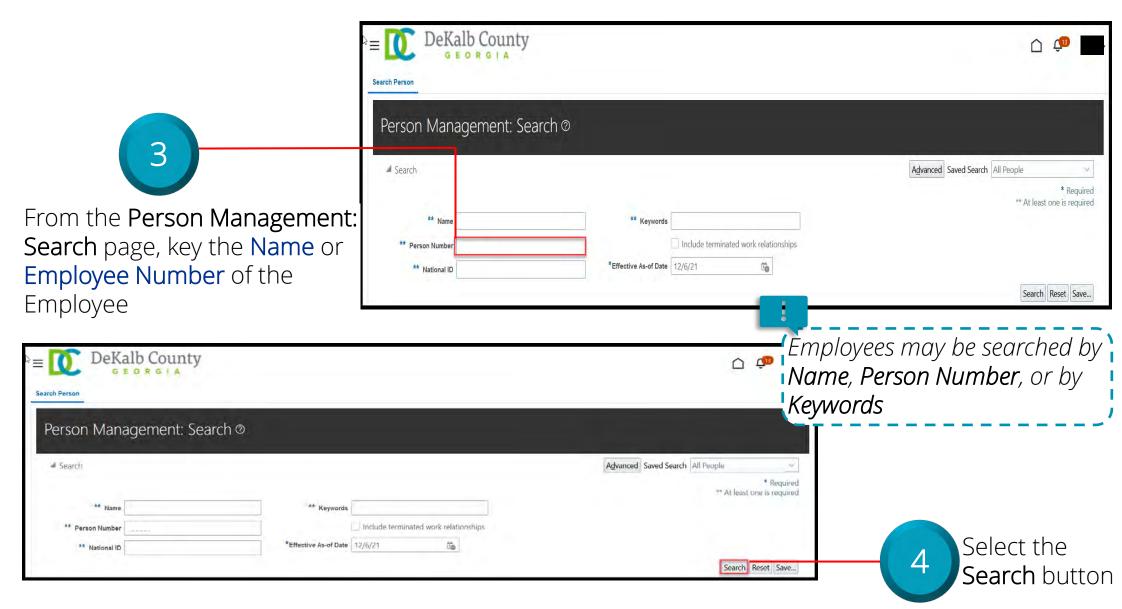




Select the **Person Management** tile within the Apps area



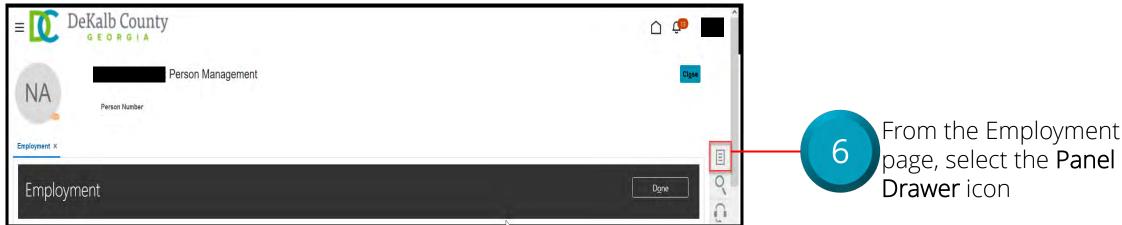
















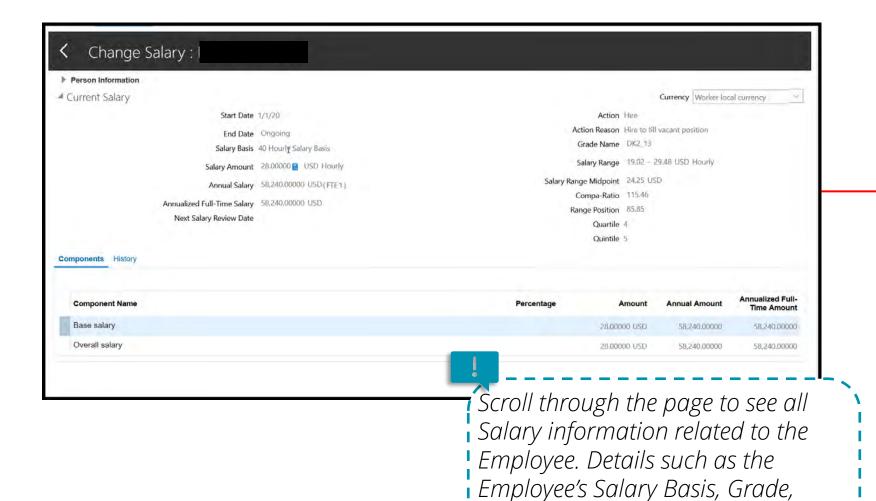


Once the Panel Drawer opens, select the **Change Salary** link from the **Compensation** section



From the Change Salary tab, the Coordinator can review the current as well as Historical Salary Details of an Employee. To see the complete Salary Details, select the Orange Chevron and select View from the drop-down list





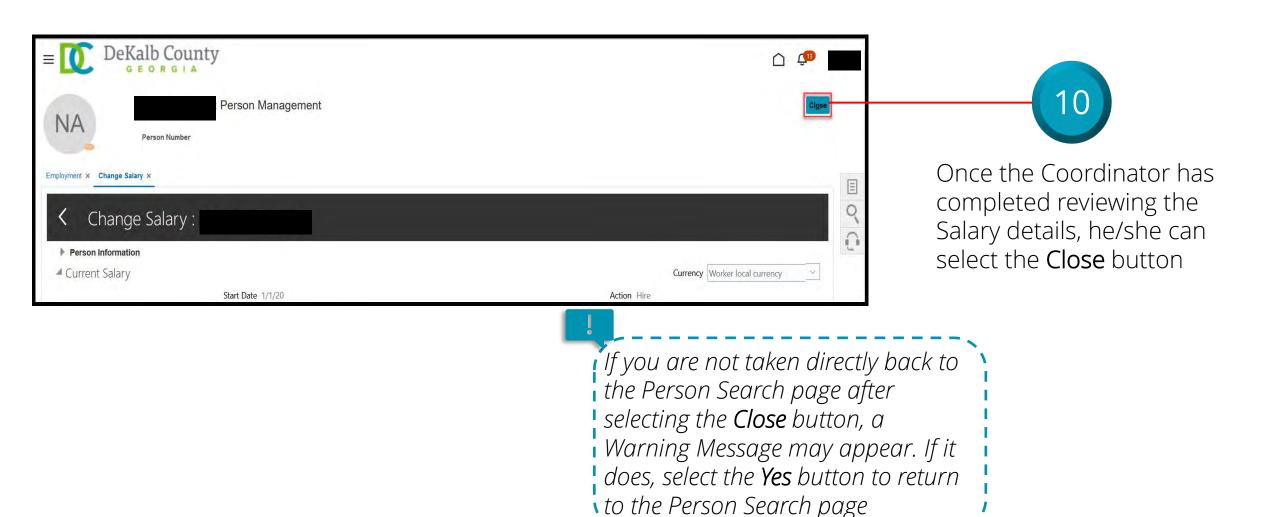
Salary Range, and Components can

be viewed

9

The Coordinator will be able to see the complete Salary Details as well as the Salary Components and History





Payroll Coordinators

 Lesson 5: Manage
 Compensation
 Section 2: Update an Employee's Salary



Lesson Objective:



Upon the completion of the Manage Compensation: Update an Employee's Salary lesson, you will be able to:

Objective

• Update an Employee's Salary





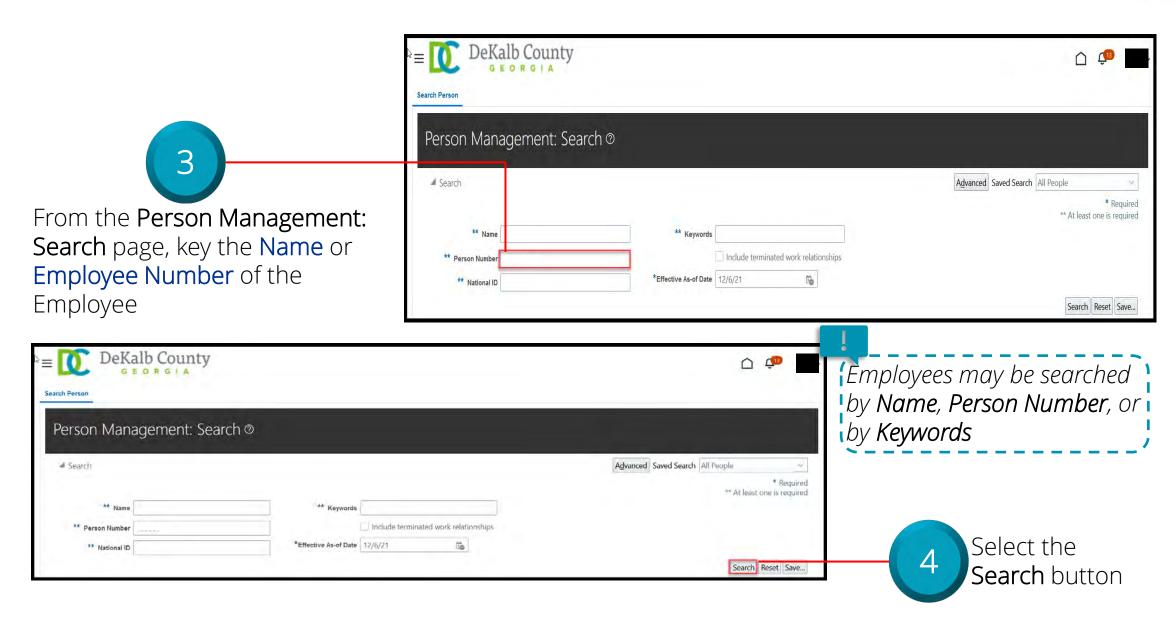




Select the **Person Management** tile within the Apps area

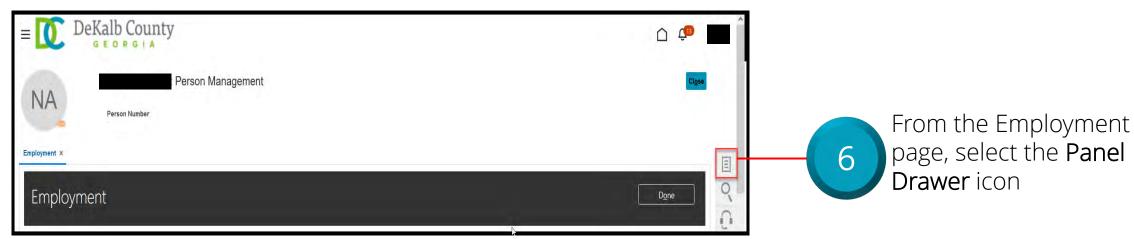




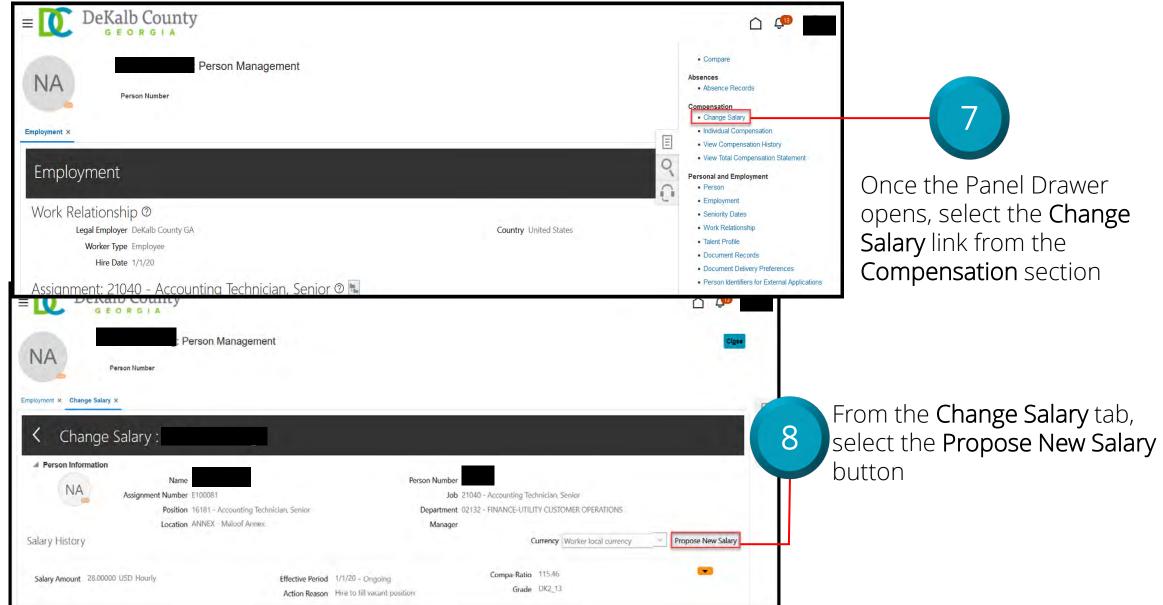




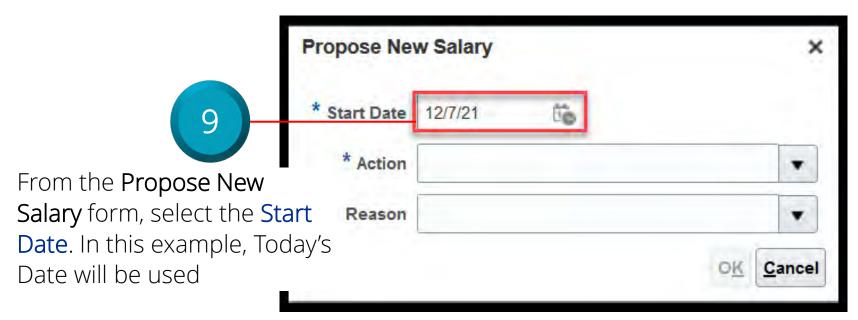


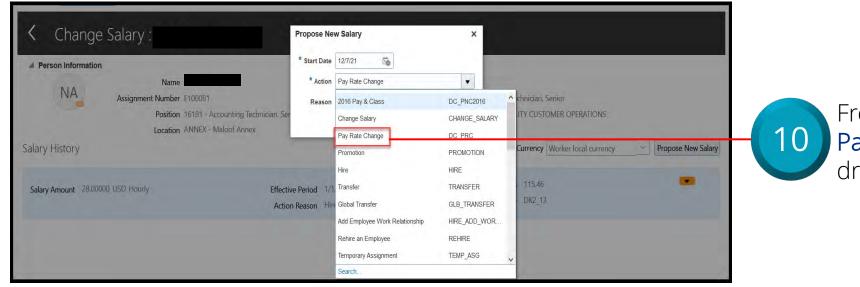






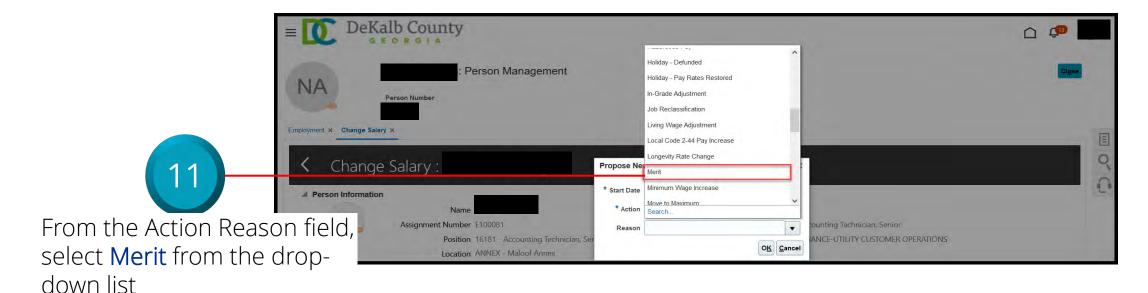


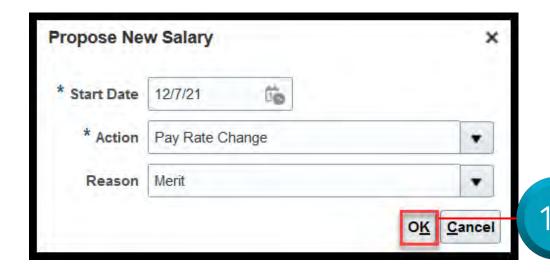




From the Action field, select Pay Rate Change from the drop-down list

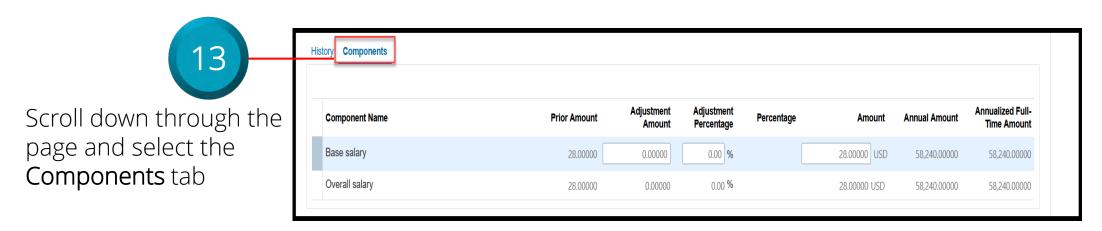


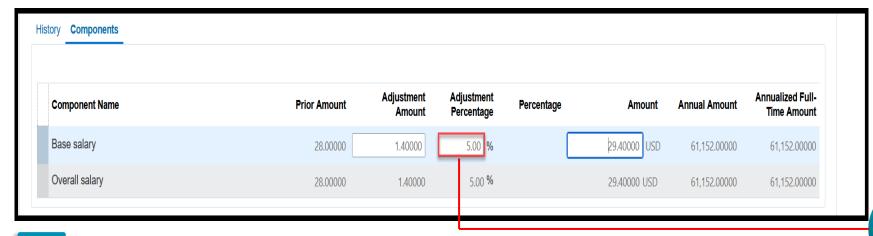




Once the details for the **Propose New Salary** have been entered, select the **OK** button







If the **Adjustment Amount** is entered, then the **Adjustment Percentage** and the new **Amount** will change and will be automatically populated. If the **Adjusted Percentage** is entered, then the **Adjustment Amount** and the new **Amount** will change and will be automatically populated

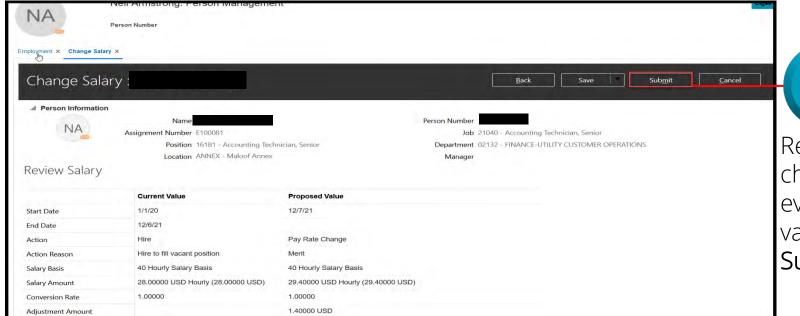
Key in a New Adjustment
Percentage or a New
Adjustment Amount. In
this example, 5% will be
used as the New
Adjustment Percentage

14



Once the update has been completed, select the **Continue** button





16

Review the proposed changes. Once everything has been validated, select the **Submit** button





If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 5: Manage
 Compensation
 Section 3: View an Employee's
 Individual Compensation Plan Details



Lesson Objective:



Upon the completion of the Manage Compensation: View an Employee's Individual Compensation Plan Details lesson, you will be able to:

Objective

• View an Employee's Compensation through Individual Compensation Plans

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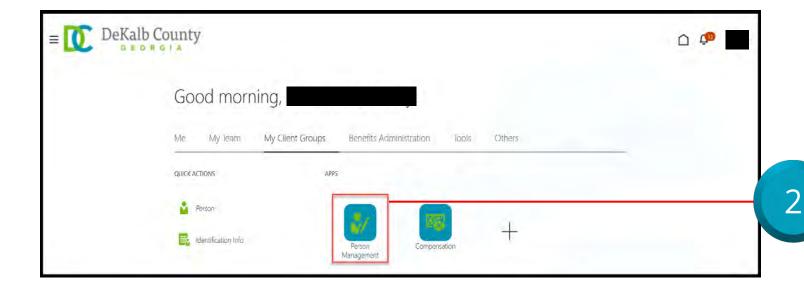
This section will walk the Coordinator through the steps of reviewing the details of an Employee's Individual Compensation Plan (ICP). Some Employees may not be eligible to receive additional Compensation. In this example, the Employee will not have any ICP awarded

CloudVergent 360

Manage Compensation: View an Employee's Individual Compensation Plan



ldentification Info

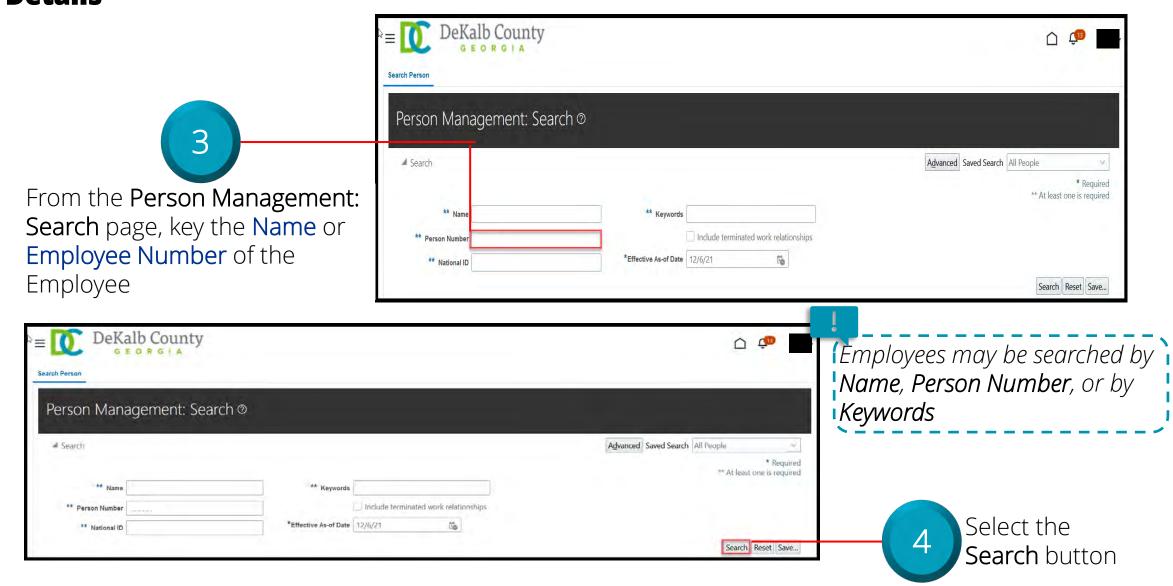


from the CV360 homepage

Select the **Person Management** tile within the Apps area

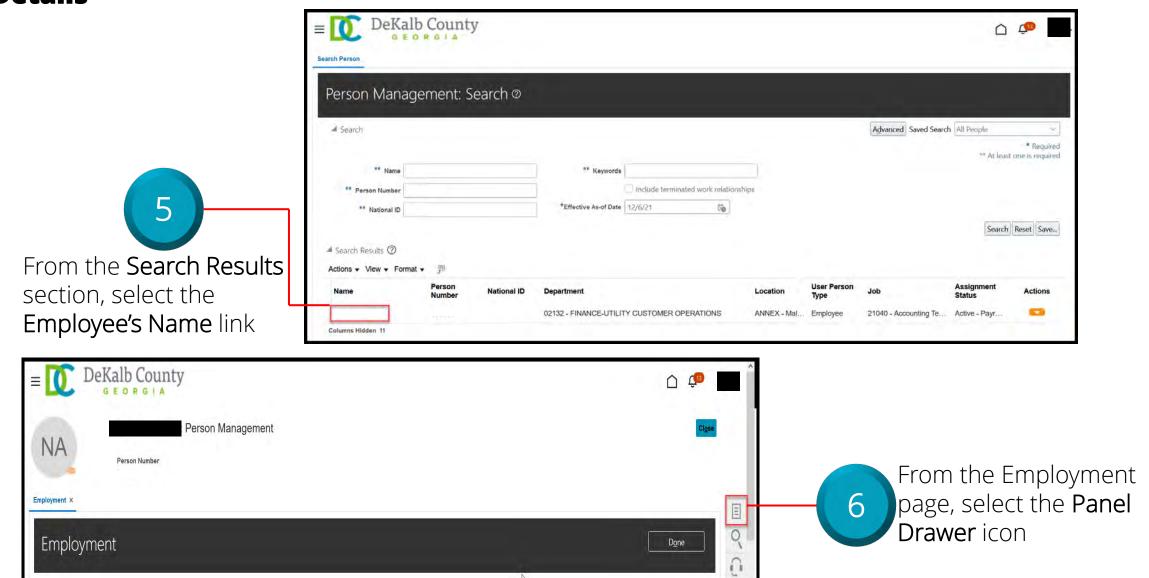


Manage Compensation: View an Employee's Individual Compensation Plan Details





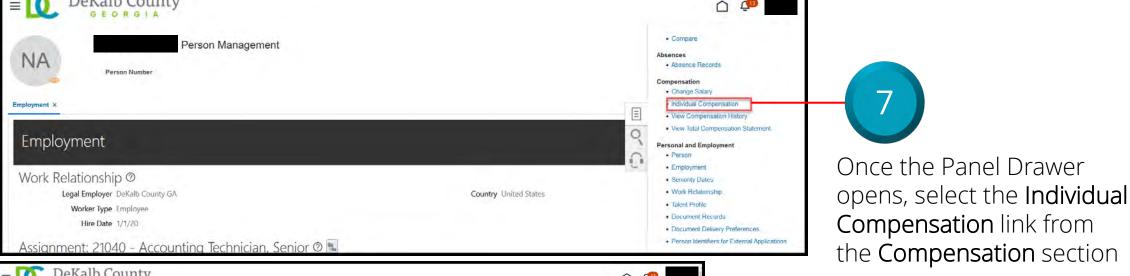
Manage Compensation: View an Employee's Individual Compensation Plan Details

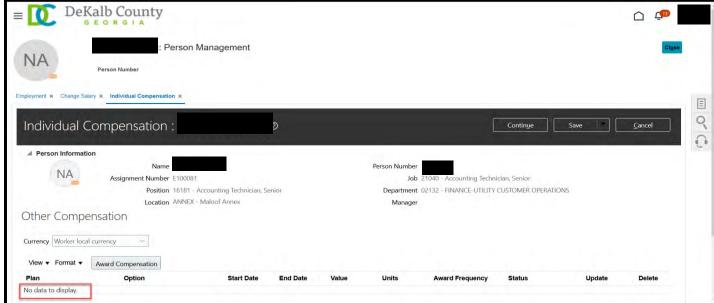








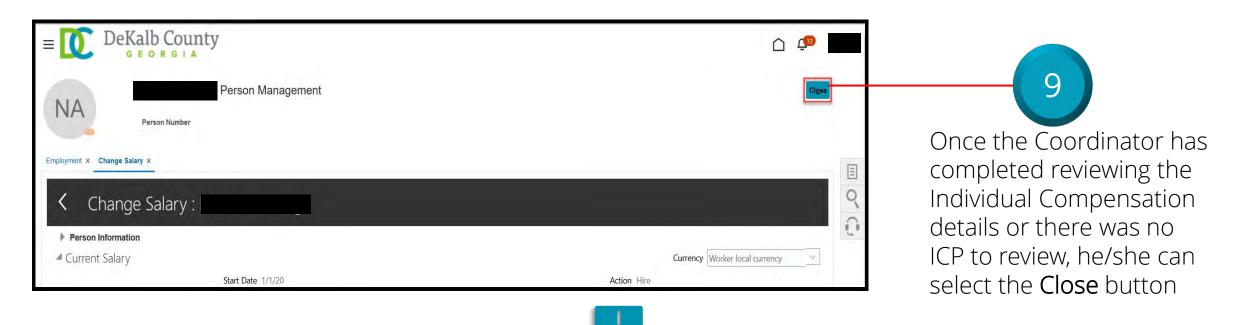




From the Individual Compensation tab, the Coordinator can review an ICP Ithat has been awarded to an Employee. If no ICP has been awarded, the Other Compensation section will house a message indicating that there is No data to display 210



Manage Compensation: View an Employee's Individual Compensation Plan Details



If you are not taken directly back to the Person Search page after selecting the Close button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 5: Manage
 Compensation
 Section 4: Award Compensation to an Employee







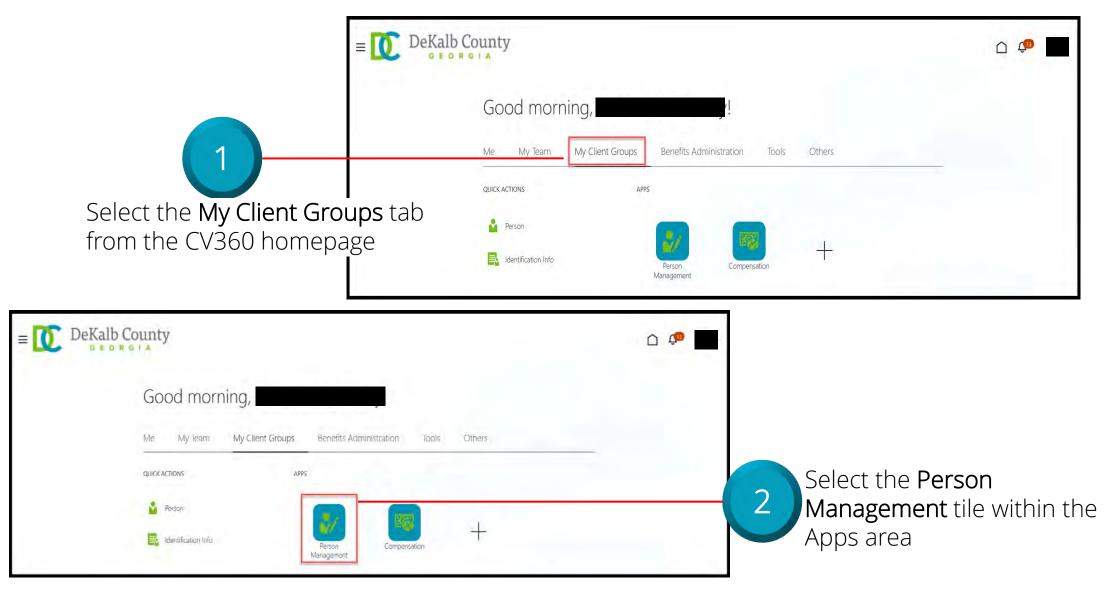
Upon the completion of the Manage Compensation: Award Compensation to an Employee lesson, you will be able to:

Objective

• Award Compensation to an Employee through Individual Compensation Plans

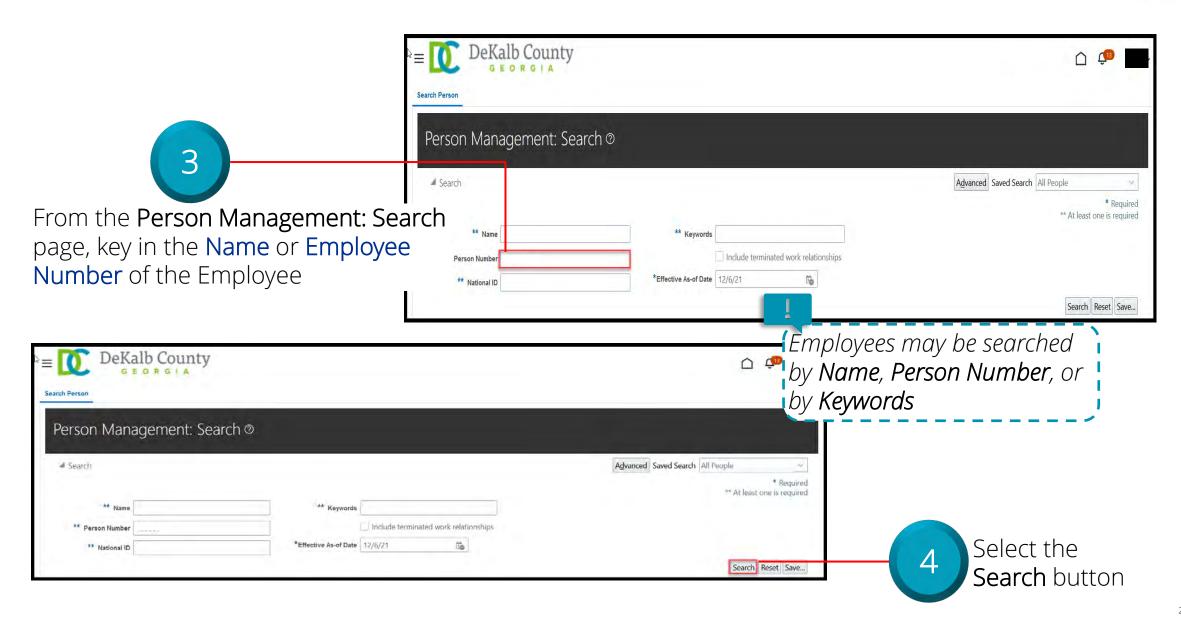








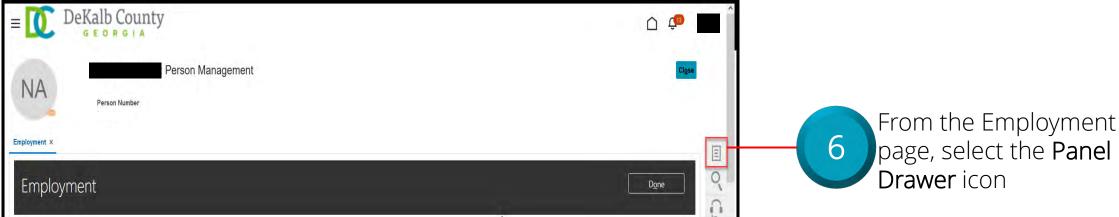






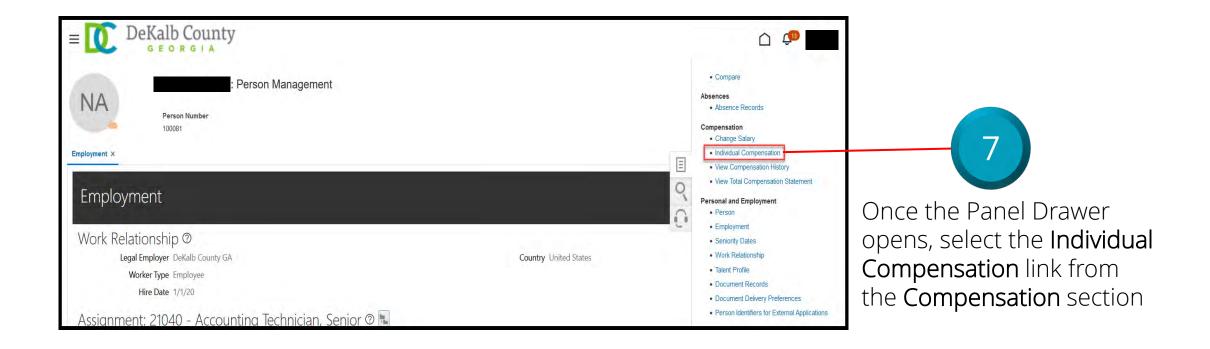






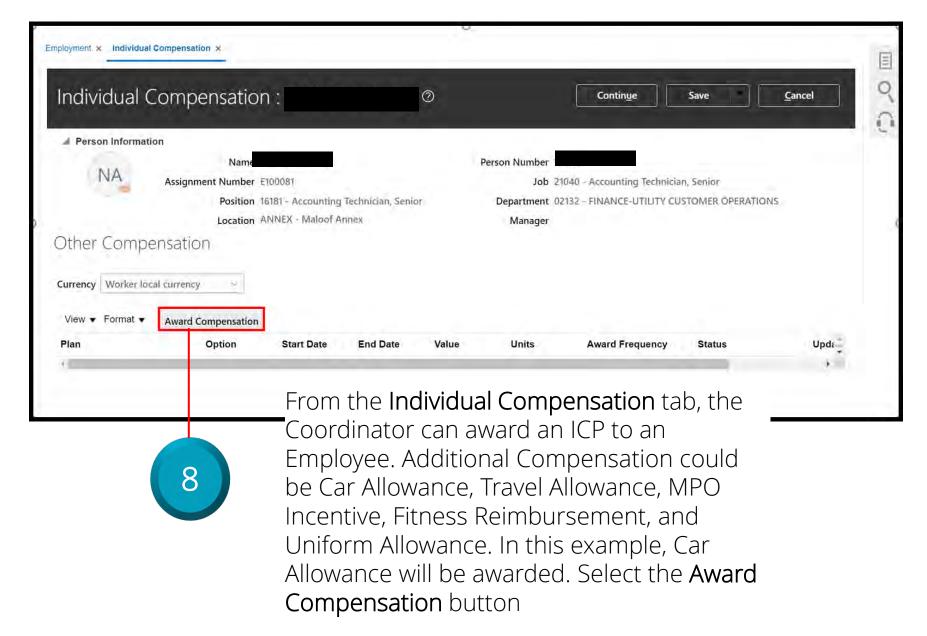






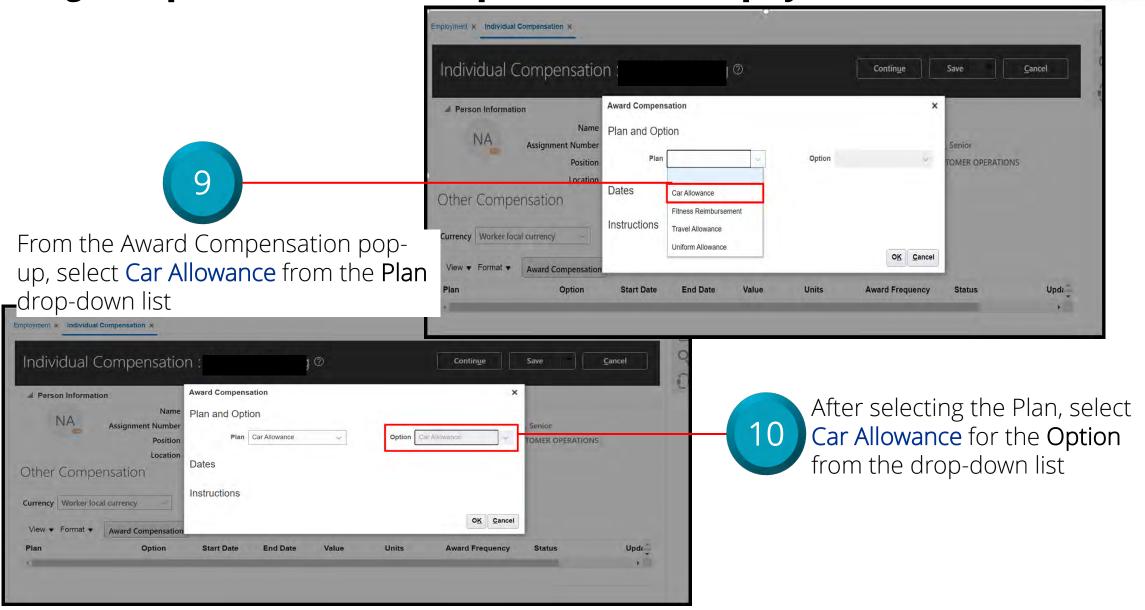














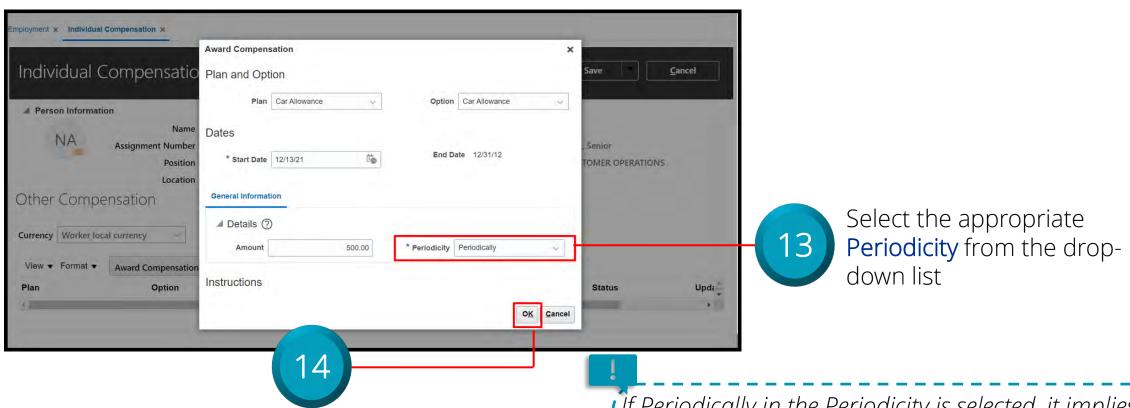
Award Compensation Individual Compensatio Plan and Option Plan Car Allowance Option Car Allowance A Person Information Dates Assignment Number End Date 12/31/12 Start Date 12/13/21 OMER OPERATIONS Other Compensation ■ Details (?) Select the **Start Date** from which you Currency Worker local currency * Periodicity Periodically want to reward the Employee with a Instructions Car Allowance OK Cancel

> loyment x Individual Compensation x Award Compensation Individual Compensatio Plan and Option Cancel Plan Car Allowance Option Car Allowance A Person Information Dates Assignment Number End Date 12/31/12 16 * Start Date 12/13/21 OMER OPERATIONS Location Other Compensation ■ Details ② Currency Worker local currency * Periodicity Periodically View ▼ Format ▼ Award Compensation Instructions OK Cancel

From the General Information section, key in the Amount you want to award to the Employee in the Amount field

Select the **OK** button



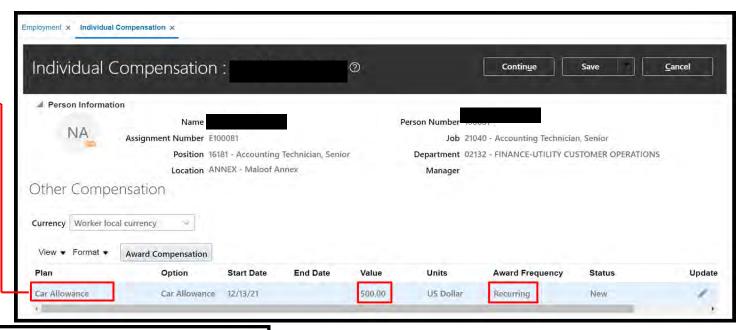


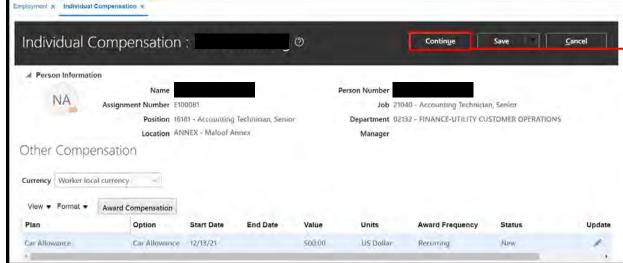
If Periodically in the Periodicity is selected, it implies the amount will be paid to Employee based on their payroll frequency (Regular Monthly or Regular Bi-Weekly). If another value is selected, the amount will get distributed or added according to the Pay Periods



15

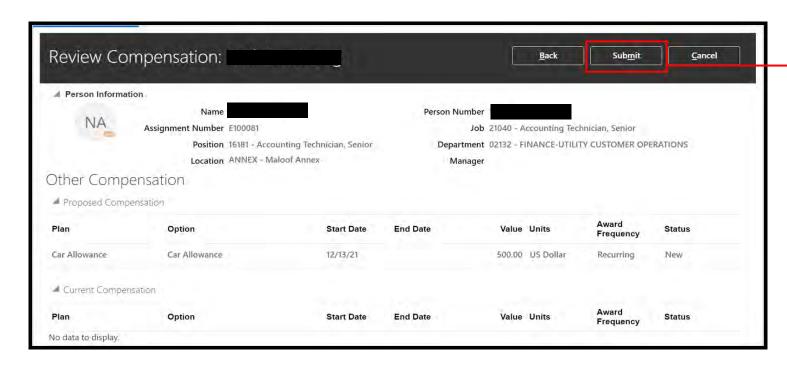
Once the **OK** button is selected, the Allowance will be a row added in the Compensation area where you will be able to see different details about the Allowance provided





After reviewing all the details, select the **Continue** button





17

From the Review page, you will be able to see the complete details related to the awarded Allowance. Once the details have been verified, select the Submit button

The submission will go through an approval process. Once it has been reviewed and approved by all the Approvers, it will be reflected in the database





If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 5: Manage
 Compensation
 Section 5: View an Employee's
 Compensation History Details







Upon the completion of the Manage Compensation: View an Employee's Compensation History Details lesson, you will be able to:

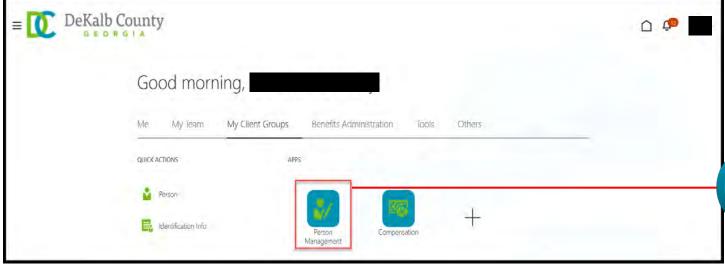
Objective

• View an Employee's Compensation History





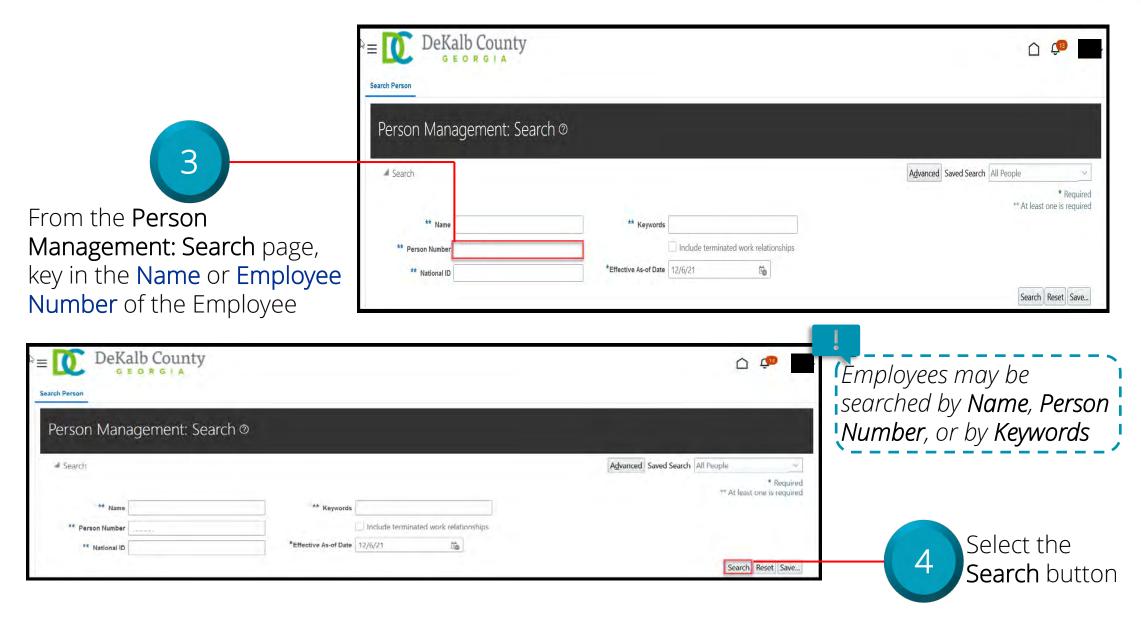




Select the **Person Management** tile within the Apps area

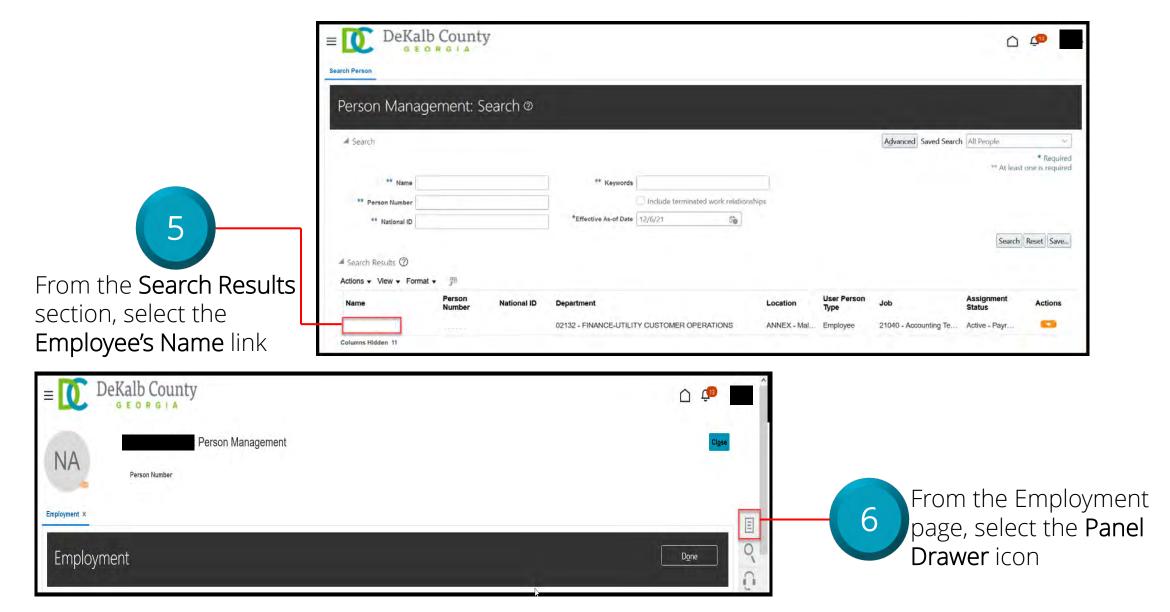






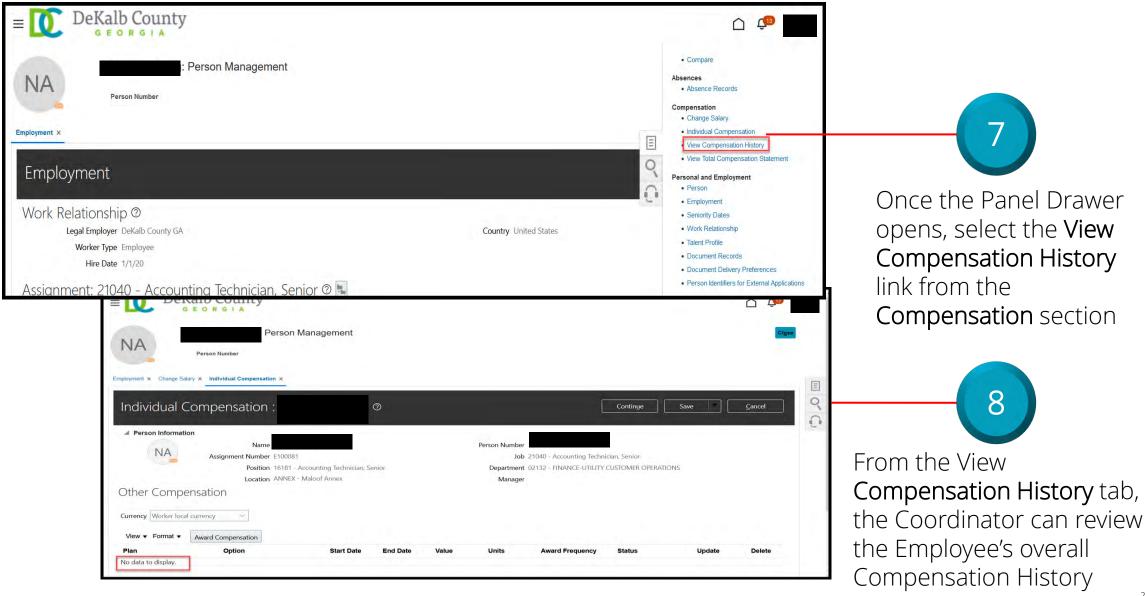






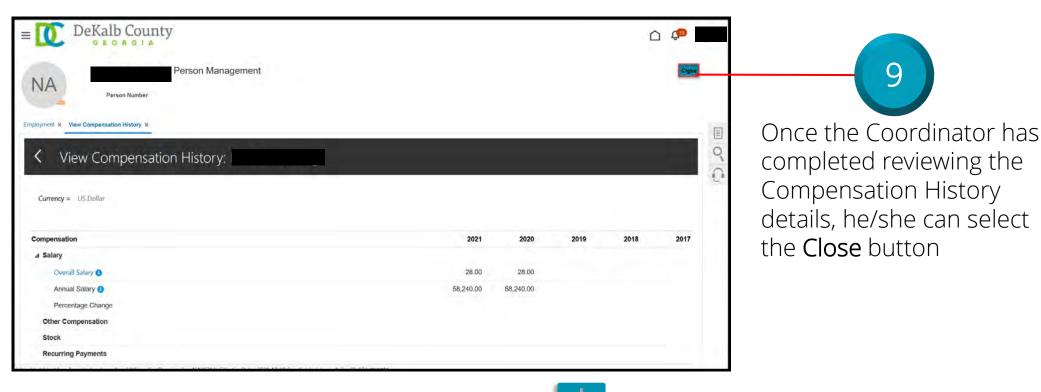
Manage Compensation: View an Employee's Compensation History Details











If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Payroll Coordinators

Lesson 5: Manage
 Compensation
 Section 6: View an Employee's Total
 Compensation Statement Details



Lesson Objective:



Upon the completion of the Manage Compensation: View an Employee's Total Compensation Statement Details lesson, you will be able to:

Objective

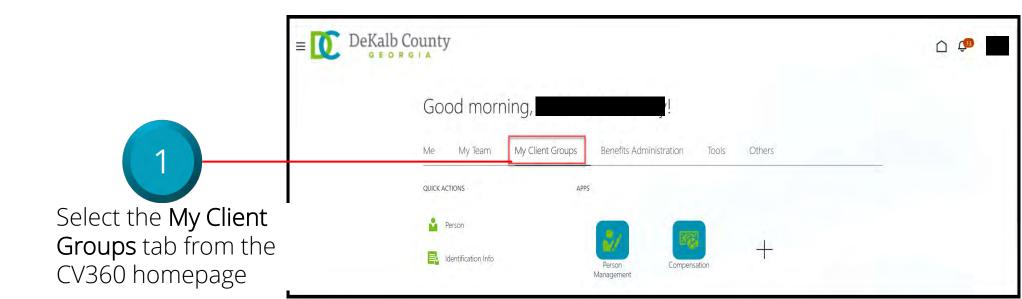
• View an Employee's Total Compensation Statement (When Available)

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This section will walk the Coordinator through the steps of reviewing the details of an Employee's Total Compensation Statement. Total Compensation Statements are generated once a year. The Statements will only be available once the Statements have been generated

CloudVergent 360

Manage Compensation: View an Employee's Total Compensation Statement Details

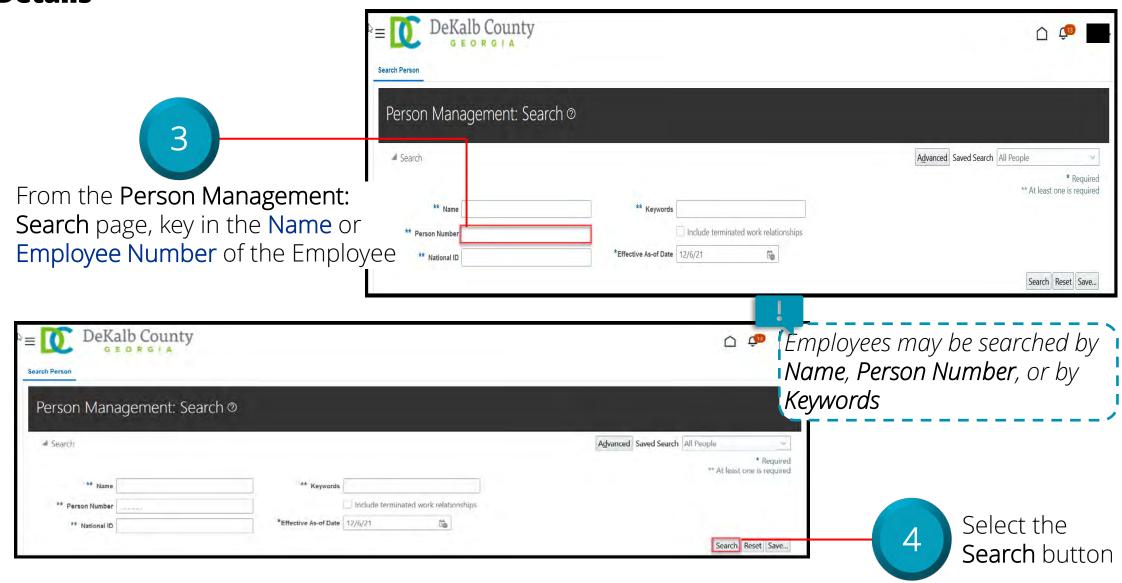




Select the **Person Management** tile within the Apps area



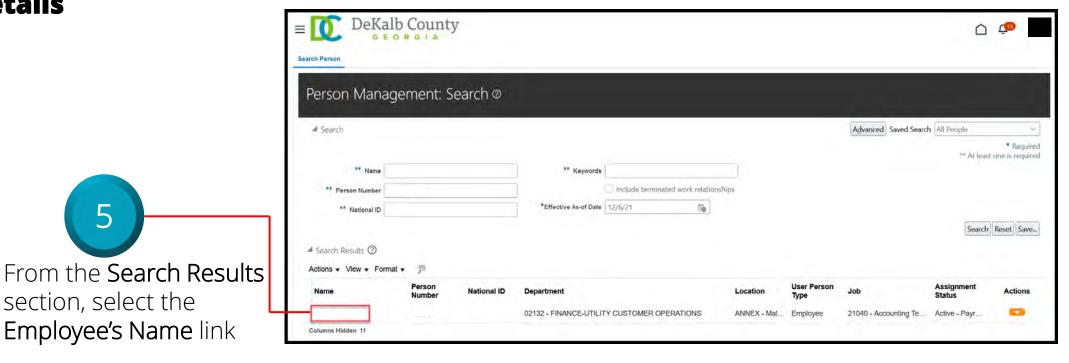
Manage Compensation: View an Employee's Total Compensation Statement Details

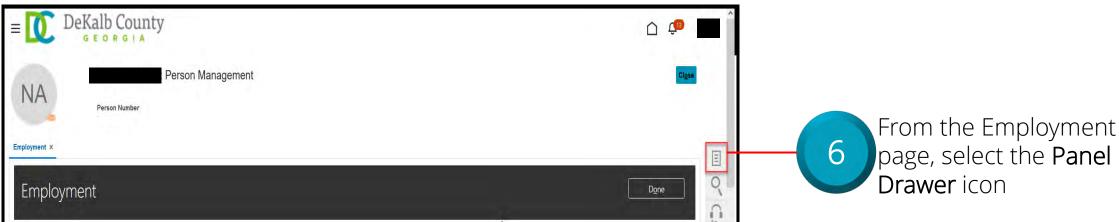


CloudVergent 360

Manage Compensation: View an Employee's Total Compensation Statement

Details







Manage Compensation: View an Employee's Total Compensation Statement Details



Once the Panel Drawer opens, select the View Total Compensation Statement link from the Compensation section

Person Management

Person Number

Employment x View Compensation History x View Total Compensation Statement x

Statement: Not Available

No statements are currently available.

Compensation Statement tab, the Coordinator can review an Employee's Total Compensation Statement. If the Statements have not been generated, the page will indicate that No Statements are currently available



Manage Compensation: View an Employee's Total Compensation Statement Details



If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page

Once the Coordinator has completed reviewing the Total Compensation Statement details or the Statement has not been generated, he/she can select the **Close** button



How frequently are Total Compensation Statements generated (in a year)?

A. Twice

B. Three times

C. Once

D. Four times





How frequently are Total Compensation Statements generated (in a year)?

A. Twice

B. Three times

C. Once

D. Four times



The correct answer is C. Total Compensation Statements are generated once a year



ICP stands for Individual Compensation Plan. *True or False?*

A. True

B. False





ICP stands for Individual Compensation Plan. *True or False?*

A. True

B. False



The correct answer is A. ICP stands for Individual Compensation Plan

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View an Employee's Total Compensation Statement

Payroll Coordinators

Lesson 6: Benefits Administration



Lesson Objective:

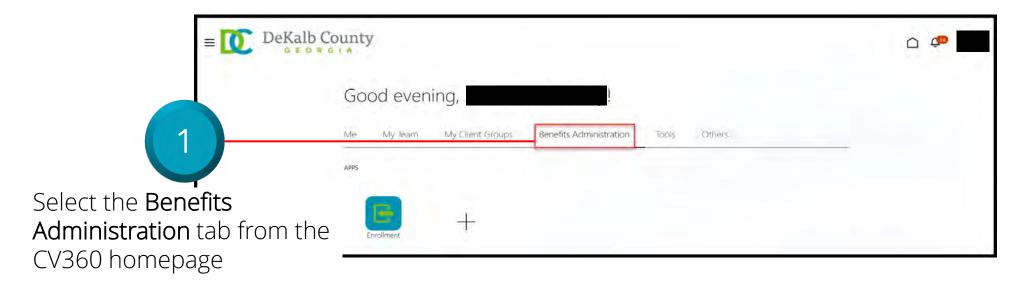


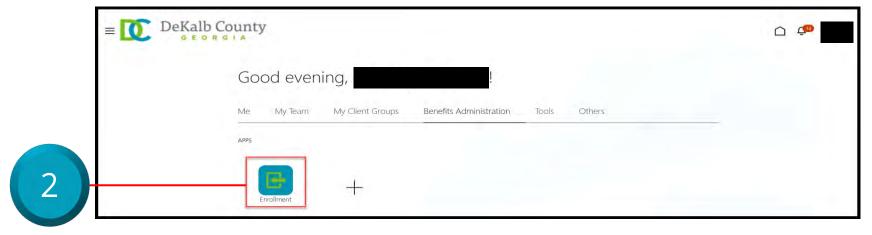
Upon the completion of the Benefits Administration lesson, you will be able to:

Objective

• View an Employee's Current Benefit Elections

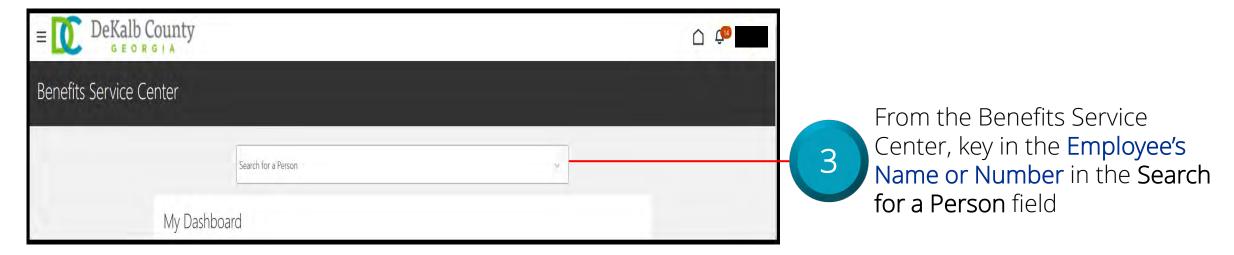


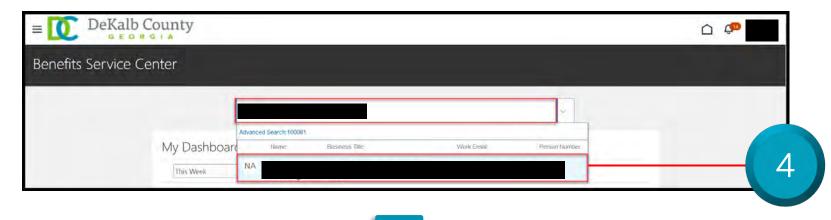




Select the **Enrollment** tile within the Apps area



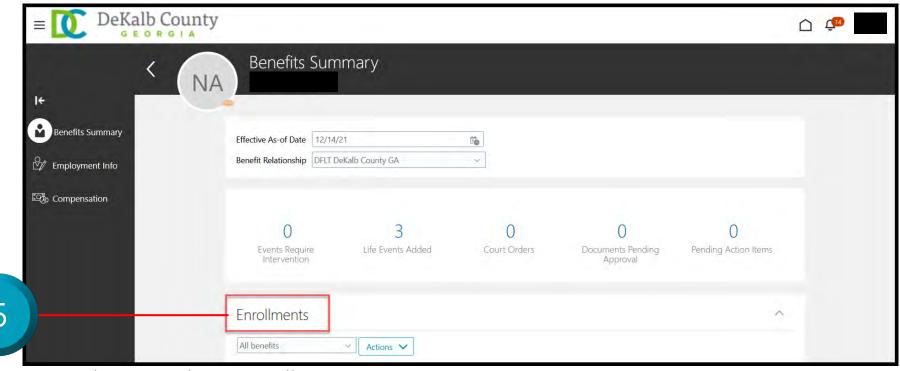




From the Search for a Person field, select the **Employee** from the returned list of values

The Search for a Person field has intelligent search capabilities. If the Employee's Name is partially keyed, then the intelligent search will return values matching the partial entry

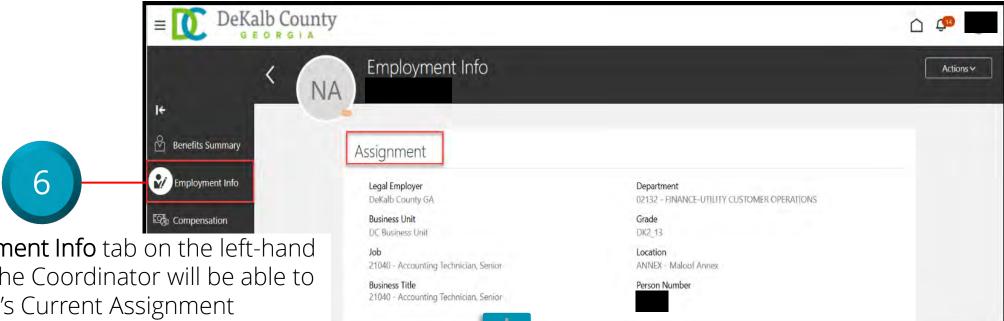




From the Benefits Summary page, the Coordinator will be able to view the Employee's Enrollments

Scroll down to see the full list of Enrollments for the Employee





Select the **Employment Info** tab on the left-hand side of the page. The Coordinator will be able to view the Employee's Current Assignment Information

Scroll down to see the full Employment Information





Select the **Compensation** tab on the left-hand side of the page. Because the Coordinator does not have the privilege to see the Employee's Compensation, he/she will see a blank page with a Warning message indicating "You don't have permission to access this page. Contact your help desk. (FND-13)"

This is intentional based on DeKalb's business requirements

Benefits Administration: Knowledge Check



Under which tab will the Coordinator be able to view Employee's Current Assignment details?

A. Benefits Summary

B. Employment Info

C. Compensation

D. Enrollments



Benefits Administration: Knowledge Check



Under which tab will the Coordinator be able to view Employee's Current Assignment details?

A. Benefits Summary

B. Employment Info

C. Compensation

D. Enrollments



The correct answer is B. Under Employment Info tab will the Coordinator be able to view Employee's Current Assignment details

Benefits Administration: Knowledge Check



From the Benefits Summary page, the Coordinator will be able to view the Employee's Enrollments. *True or False?*

A. True

B. False



Benefits Administration: Knowledge Check



From the Benefits Summary page, the Coordinator will be able to view the Employee's Enrollments. *True or False?*

B. False



The correct answer is A. From the Benefits Summary page, the Coordinator will be able to view the Employee's Enrollments

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View an Employee's Enrollments

Payroll Coordinators

Lesson 7: View an Employee's Pay slip



Lesson Objective:



Upon the completion of the View an Employee's Pay slip lesson, you will be able to:

Objective

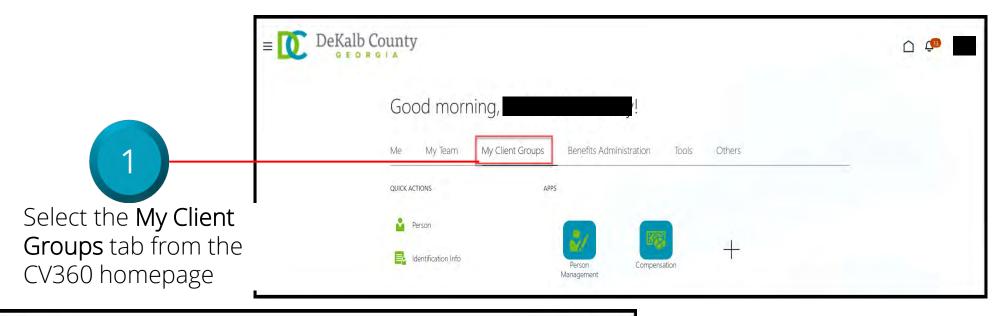
View an Employee's Pay slip

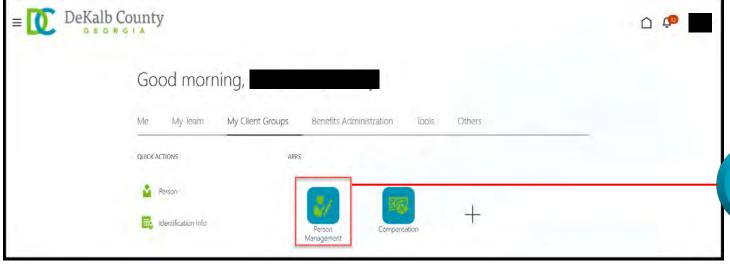
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There may be times when an Employee will dispute his or her pay. The Coordinator will be able to view the Employee's Pay Slip to look for any discrepancies in Pay for the Employee





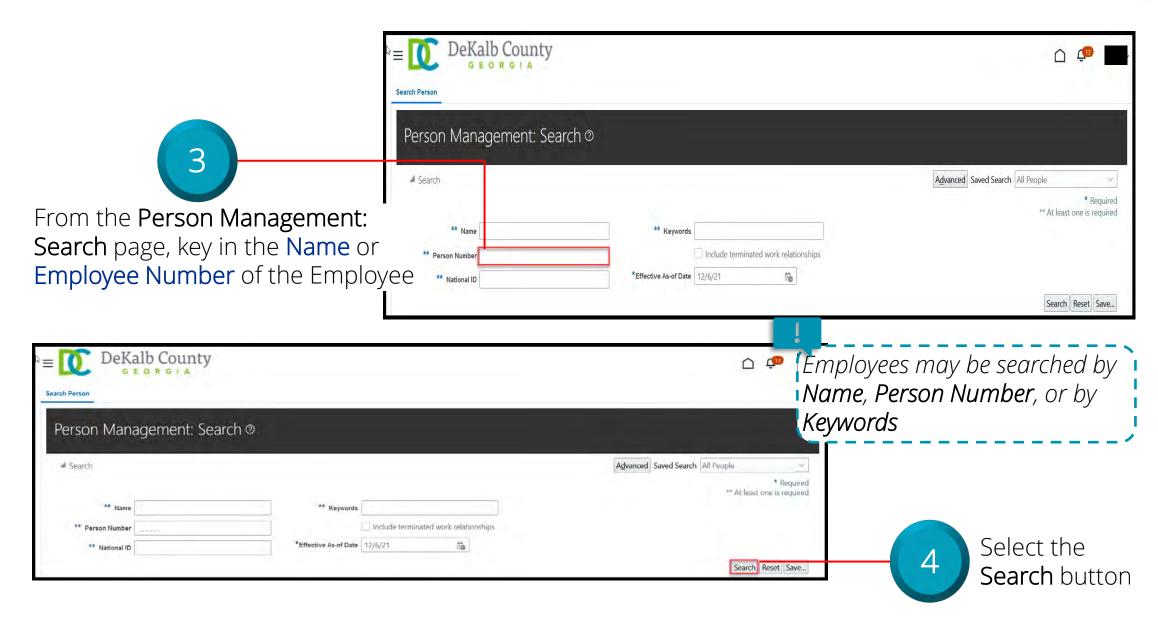




Select the **Person Management** tile within the Apps area

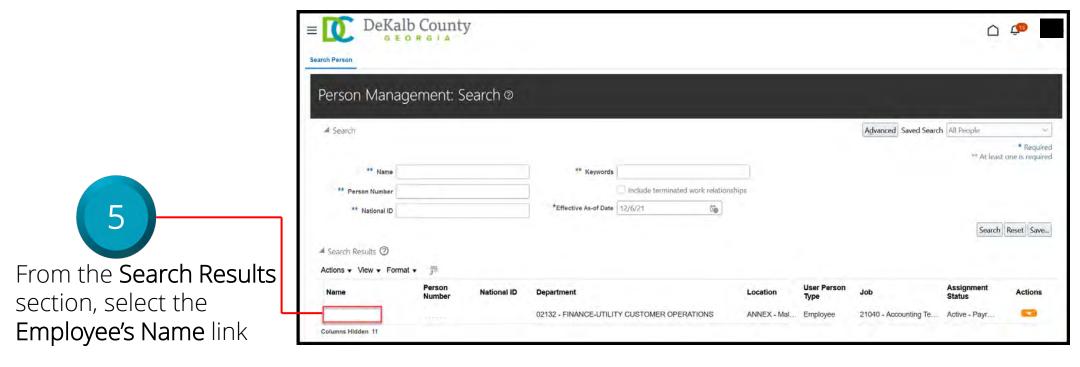


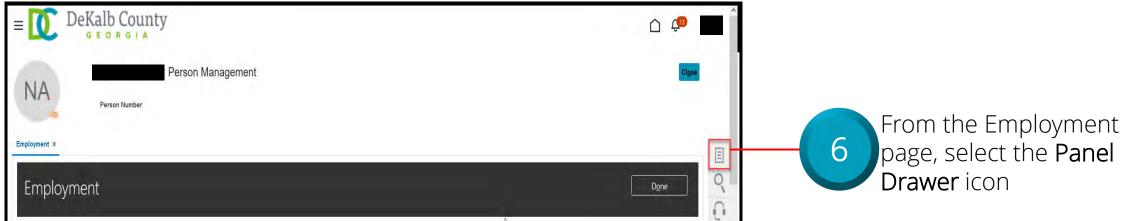






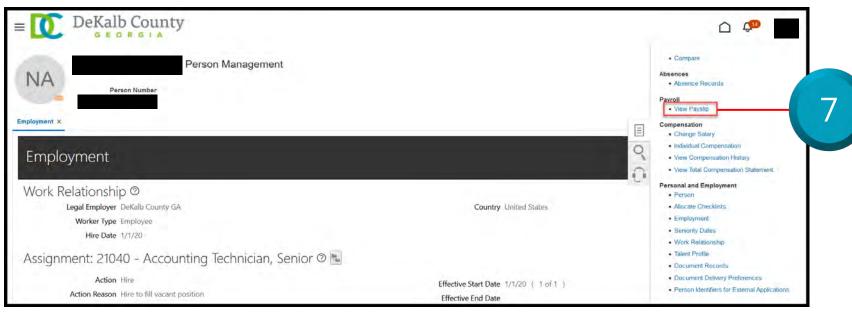




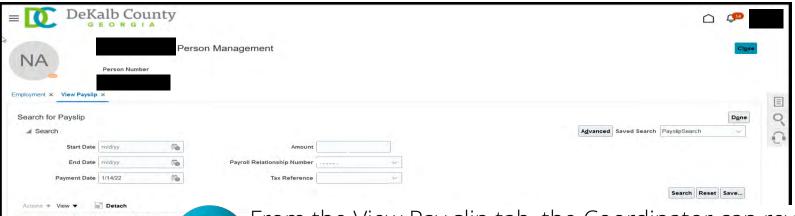


No data to display





Once the Panel Drawer opens, select the View Pay slip link from the Payroll section



From the View Pay slip tab, the Coordinator can review the Employee's Pay slip. If no Pay slips are available, a message, No data to display, would appear on the page

Employment x View Payslip x





Advanced Saved Search PayslipSearch

Search Reset Save...

Payroll Relationship Numbe

083583

063563

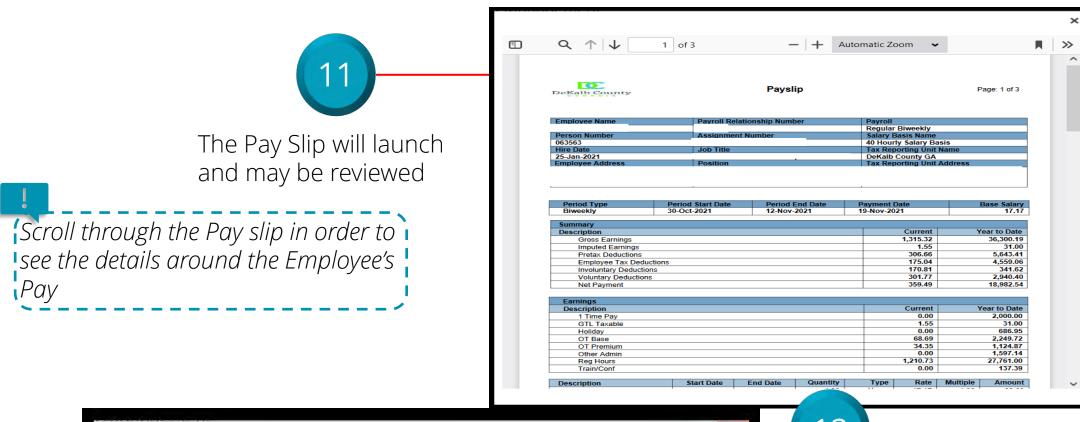
063563

Search for Payslip Start Date m/d/yy End Date m/d/yy Payroll Relationship Number Payment Date m/d/yy **End Date** Period Number Payslip Payment Date Tax Reference Amount Regular Biweekly DeKalb County GA 10/30/21 11/12/21 359.49 DeKalb County GA 10/16/21 10/29/21 359.49 10/22/21 From the Blind Search, select the **Pay slip** icon from the Pay slip column

To search for a Pay slip, key in the Start Date, End Date, or Payment Date in the Search section. Blind Searches can be done by selecting the Submit button without entering any Dates. In this example, a Blind Search will be done

If the Coordinator wants to see a specific period, then key in the Dates for the period in question. The Dates may be keyed in, or the Calendar icon may be selected, and the Date selected from the Calendar



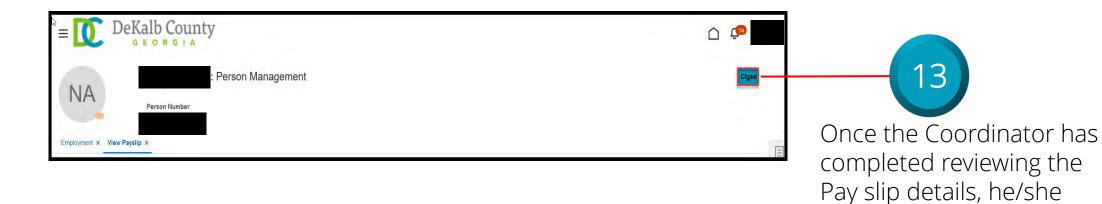


Once the Pay slip has been reviewed, select the X button



can select the Close

button



If you are not taken directly back to the Person Search page after selecting the **Close** button, a Warning Message may appear. If it does, select the **Yes** button to return to the Person Search page



Blind Search can be done by selecting the Submit button without entering any Dates. *True or False?*

A. True

B. False





Blind Search can be done by selecting the Submit button without entering any Dates. *True or False?*

<mark>A. True</mark>	
B. False	



The correct answer is A. Blind Search can be done by selecting the Submit button without entering any Dates



Which of the following options from the Panel Drawer do you select to view an Employee's Pay slip?

A. Change Salary

B. View Total Compensation Statement

C. View Compensation History

D. View Pay slip





Which of the following options from the Panel Drawer do you select to view an Employee's Pay slip?

A. Change Salary

B. View Total Compensation Statement

C. View Compensation History

D. View Pay slip



The correct answer is D. You select View Pay slip from the Panel Drawer to view an Employee's Pay slip

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View an Employee's Pay slip

Payroll Coordinators

Lesson 8: View a Report



Lesson Objective:



Upon the completion of the View a Report lesson, you will be able to:

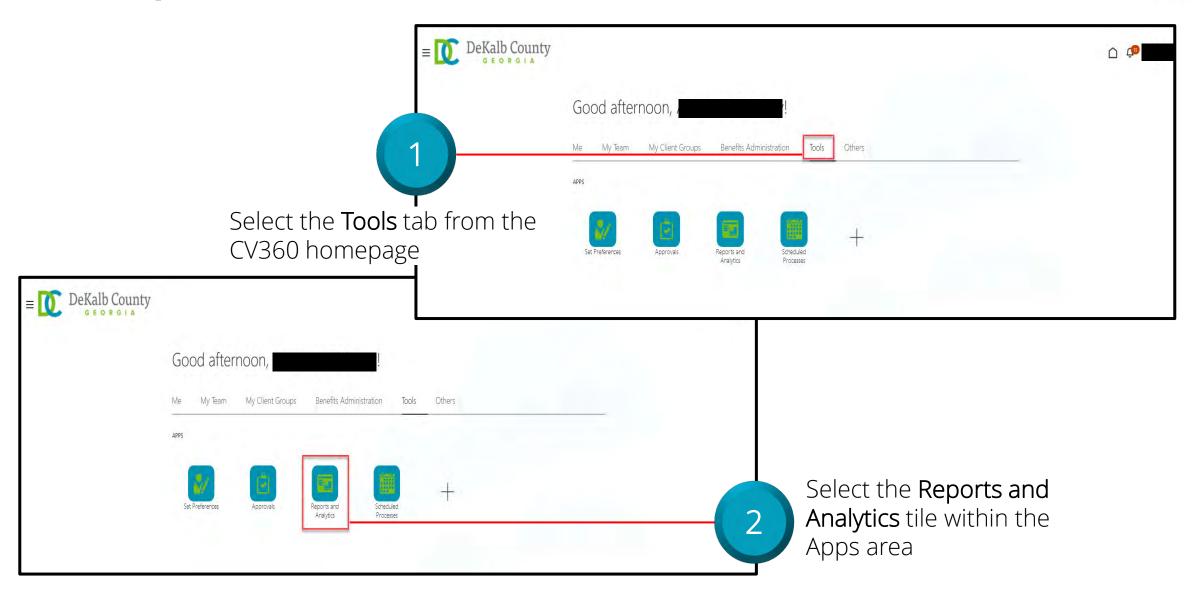
Objective

• View a Report

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Payroll Coordinators will have access to a Report that will display all positions within their Department. This Report will also allow them to see all vacant positions





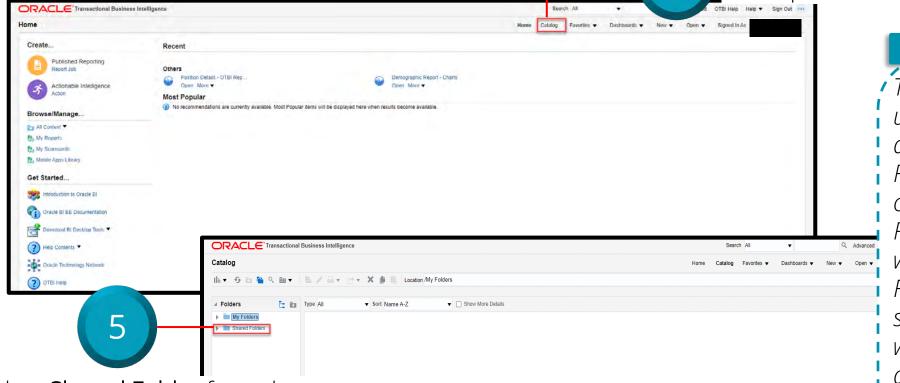








Select the **Catalog** button. It will take you to the Reports Catalog

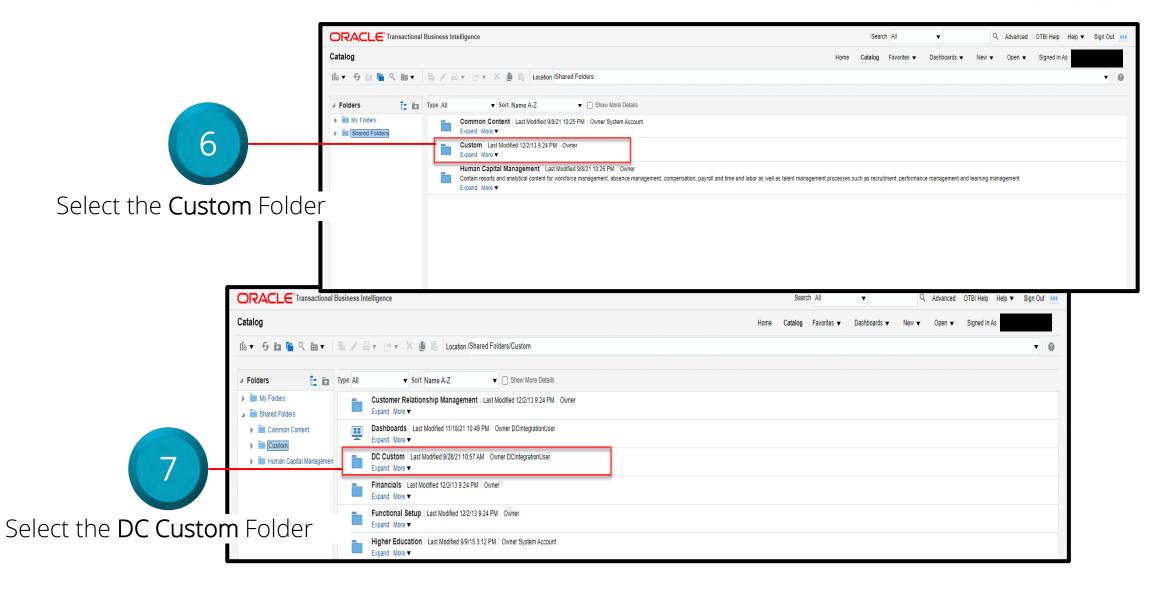


Select **Shared Folder** from the Catalog on the left-hand side of the page

There are 2 main Folders under Catalog, My Folder and Shared Folder. My Folder is local to the user currently logged in and any Report that you may create will be housed in this Folder, Shared Folder is shared across all the users who have access to Reports and Analytics. The Reports that will be available for a user will depend on the role the user has in CV360

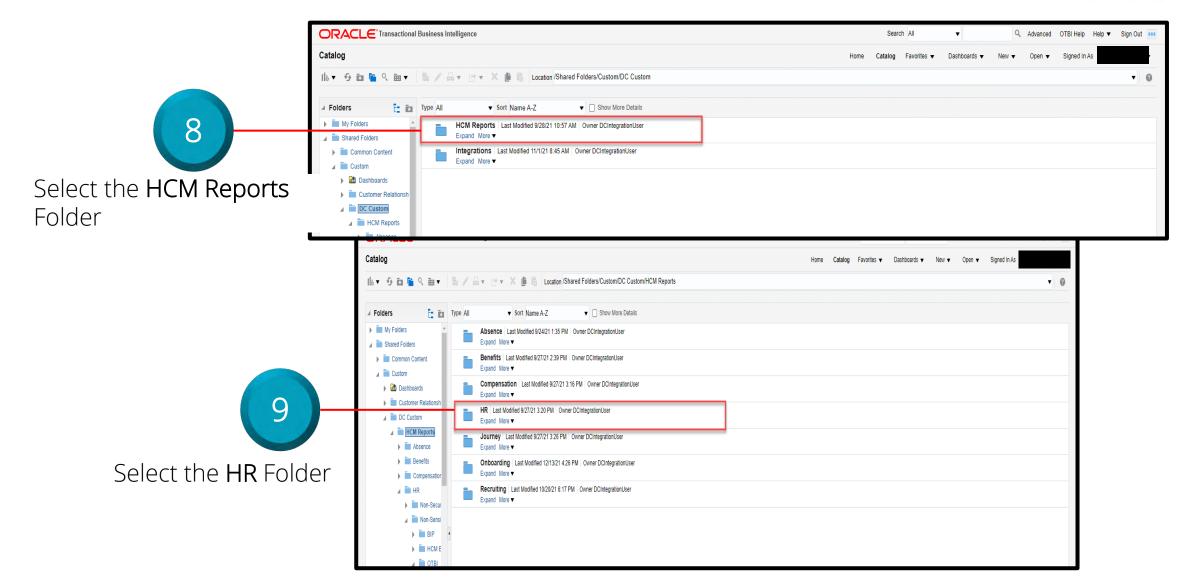






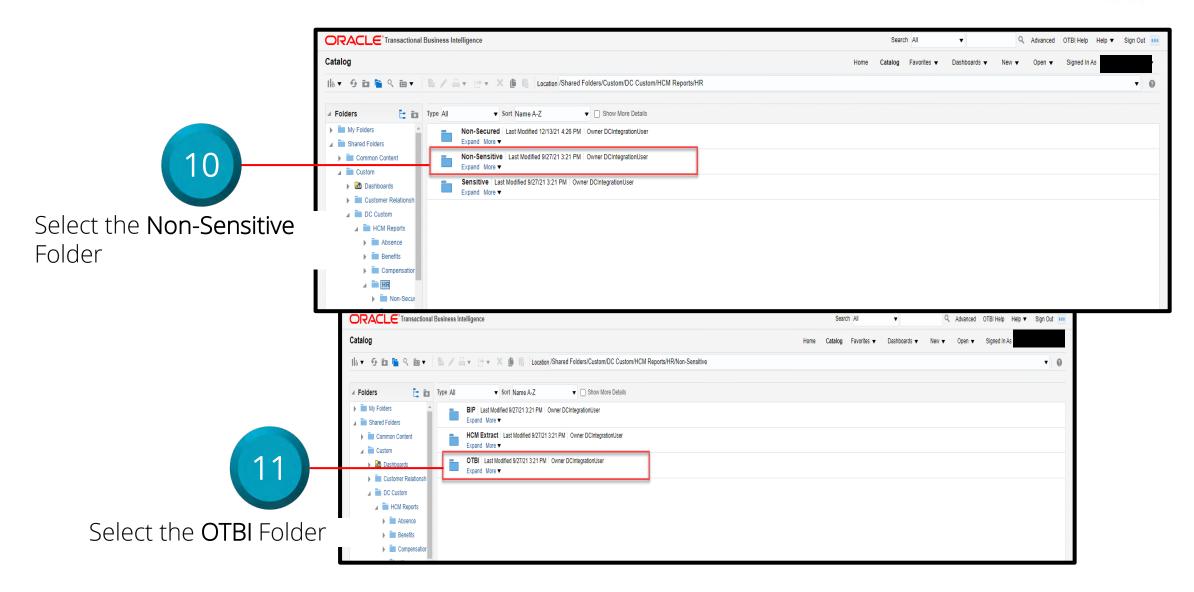




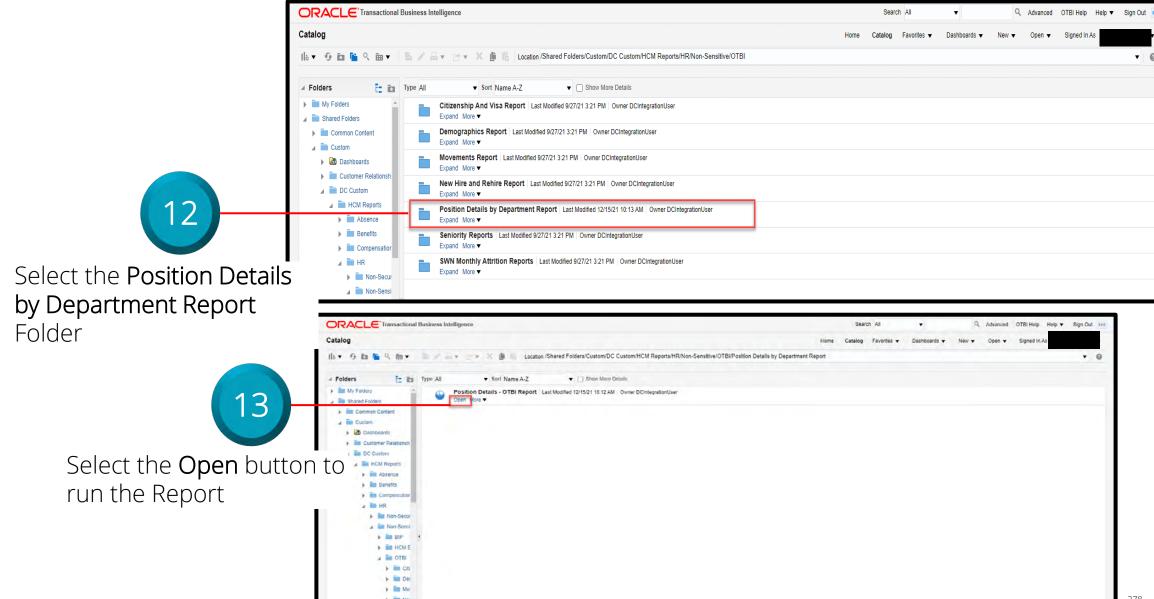




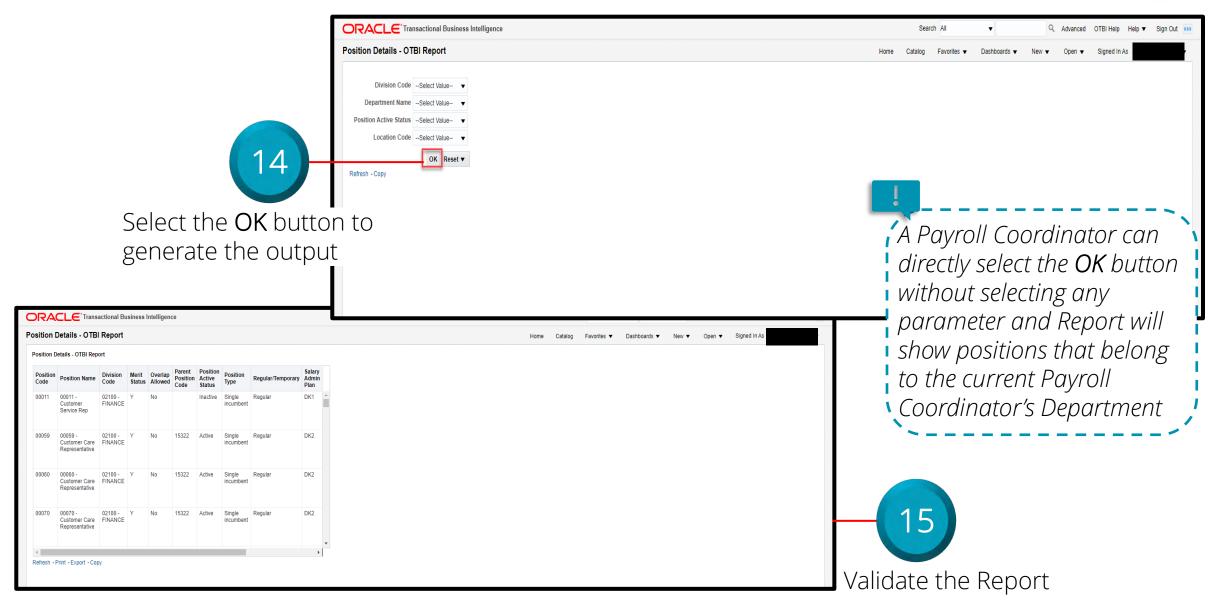


















To export the output, select the **Export** button in the Report below



To view a Report, you select the Secured Folder under the HR Folder. *True or False?*

A. True

B. False





To view a Report, you select the Secured Folder under the HR Folder. *True or False?*

A. True

B. False



The correct answer is B. To view a Report, you select the Non-Sensitive Folder under the HR Folder



Which tab on the CV360 homepage will allow you to view a Report?

A. Tools

В. Ме

C. My Team

D. My Client Groups





Which tab on the CV360 homepage will allow you to view a Report?





The correct answer is A. The Tools tab on the CV360 homepage will allow you to view a Report

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• View an Employee's Report

Payroll Coordinators

Lesson 9: Manage Approvals



Lesson Objective:



Upon the completion of the Managing Approvals lesson, you will be able to:

Objective

Manage Approvals

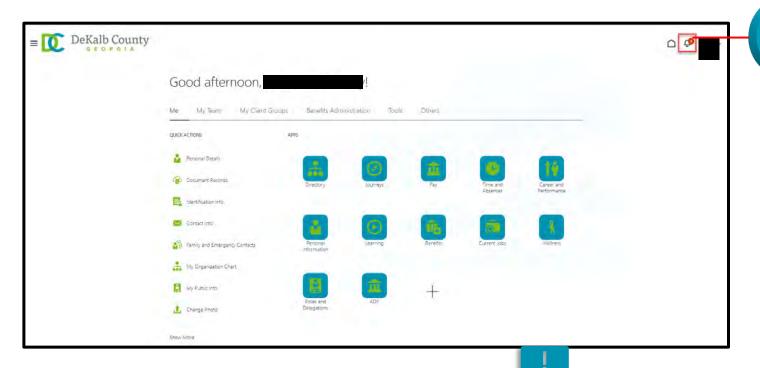
Payroll Coordinators will be receiving Approval
Notifications from Employees for approving transactions
such as Address Update, Email Update, Phone Updates

and Driver's License. When an Employee submits any of the mentioned request, the Coordinator will receive an

Approval Notification

Managing Approvals



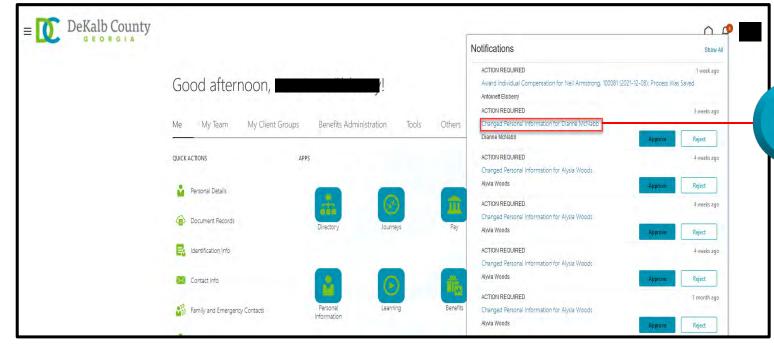


Select the **Bell** icon on the top right corner of the CV360 homepage

Selecting the Bell icon will display a list of all the notifications that the Payroll Coordinators have received in CV360. The notification can either be an approval notification or it can be For Your Information (FYI) notification. If the notification is a FYI, there will be a Dismiss button for the user to Dismiss the notification

Managing Approvals





Select the relevant **Notification** that you would like to act on (Approve or Reject)

Selecting the Notification will open the Notification with basic details of the transaction in a new tab. You can also click on Approve and approve the transaction

■ DeKalb County Notifications Show All Good afternoon Antoinett Fisherry ACTION REQUIRED Dianne McNabb QUICK ACTIONS ACTION REQUIRED 4 weeks ago Personal Details Changed Personal Information for Alysia Woods Document Records Reject Identification Info Changed Personal Information for Alysia Wood Reject Family and Emergency Contacts Changed Personal Information for Alysia Woods Alyvia Woods Reject

Select the **Approve** button to approve the transaction

To Reject a request, select the Reject button next to the Approve button



There are two types of Notifications: Approval Notification and For Your Information Notification. *True or False?*

A. True

B. False





There are two types of Notifications: Approval Notification and For Your Information Notification. *True or False?*

A. True

B. False



The correct answer is A. There are two types of Notifications: Approval Notification and For Your nformation Notification



Which of the following icons on the CV360 homepage is selected to display a list of all Notifications?

A. Home

B. Green dot

C. Bell

D. Down arrow





Which of the following icons on the CV360 homepage is selected to display a list of all Notifications?

A. Home

B. Green dot

C. Bell

D. Down arrow



The correct answer is C. Bell icon on the CV360 homepage is selected to display a list of all Notifications

Course Exercise:



Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

• Approve an Employee's request



Document Type

Leave Approval

Leave Extension

Leave Request

Other than Medical Reports

Return to Work

Disability Absence

Medical Reports

Disciplinary

Bonus Payment

Payments after Termination

Relocation Payments

Salary Increase

Sign on Bonus

Termination

Achievements - non-performance based



Document Type

Length of Service

Letter of Recognition

Other Awards and Recognitions

Performance Based

Birth certificate

Application

Before Employment Physical

Compensation Notification

Employment / Compensation Verification

Employment Agreement

Other Employment

Recruiting

Recruiting Job Offer

Recurring Physical

Security Clearance Report



Document Type

Terms and Conditions

Attendance Record

Proof of Enrollment Child Care

Proof of Enrollment Education

Transcripts

Moving Expense Non-Taxable

Other Expenses Non-Taxable

Supplies Non-Taxable

Moving Expense Taxable

Other Expenses Taxable

Supplies Taxable

Education Institution

Government Issued

Military Active Duty

Military Dependent



Document Type

Military Draft

Native of Country

Other Identification

Passport

Permanent Resident

Resident Citizen

Voter Registration

Adoption

Birth

Death

Domestic partner legal affidavit

Marriage

Other Legal Document

Power of Attorney

Drivers License



Document Type

Other Licenses and Certificates

Company Car

Employer Paid Benefits

Performance Improvement Plan

Residence

Work

Payroll Coordinators Summary



You have reached the end of the Payroll Coordinators course. You should now be able to:

- ✓ View an Employee's Personal and Biographical Information
- ✓ View an Employee's Extra Information: Company Asset and Medicare Indicators
- ✓ Update an Employee's Assignment Information
- ✓ View an Employee's Seniority Dates
- ✓ View an Employee's Work Relationship Details
- ✓ View and Update an Employee's Skills and Qualifications Details
- ✓ View and Update an Employee's Document Records
- ✓ Add a Document of Record
- ✓ View an Employee's Document Delivery Preferences
- ✓ View an Employee's Person Identifiers for External Applications

Payroll Coordinators Summary



You have reached the end of the Payroll Coordinators course. You should now be able to:

- ✓ View an Employee's Absence Records
- ✓ View and Update an Employee's Salary
- ✓ View an Employee's Compensation through Individual Compensation Plans
- ✓ Award Compensation to an Employee through Individual Compensation Plans
- ✓ View an Employee's Compensation History
- ✓ View an Employee's Total Compensation Statement (When Available)
- ✓ View an Employee's Pay slip
- ✓ View a Report
- ✓ Manage Approvals

Payroll Coordinators Summary



You have reached the end of the Payroll Coordinators course. You should now be able to:

For additional information on the topics covered in this course, please consider using the following resources:

- QRG (If Applicable)
- DeKalb POC:
 - Katherine Furlong | kdfurlong@dekalbcountyga.gov
 - Fabienne A. Niles | <u>faniles@dekalbcountyga.gov</u>
 - Catrina Rives | <u>carives@dekalbcountyga.gov</u>