

Payroll Coordinators

Manage Employment



Lesson Objectives:

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



CloudVergent 360

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

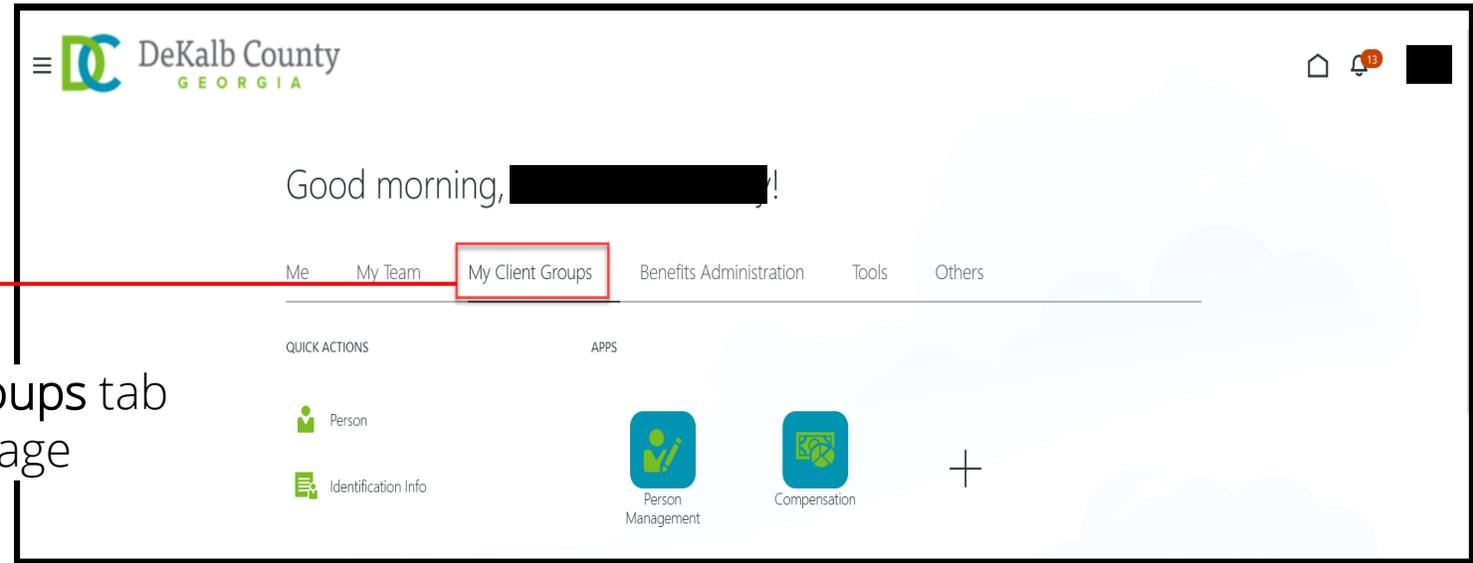


As a Payroll Coordinator, access to promote, transfer, and make assignment changes will be available. In this example, an Assignment Status change will be made for an employee

Manage Employment: Update an Employee's Assignment Details

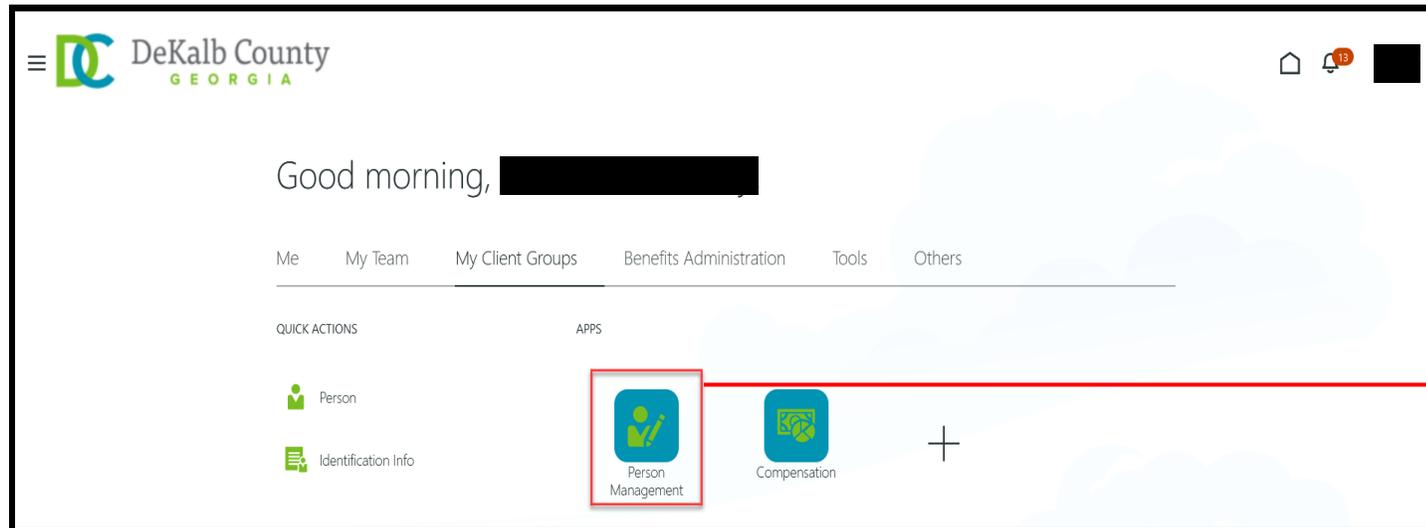
1

Select the My Client Groups tab from the CV360 homepage



2

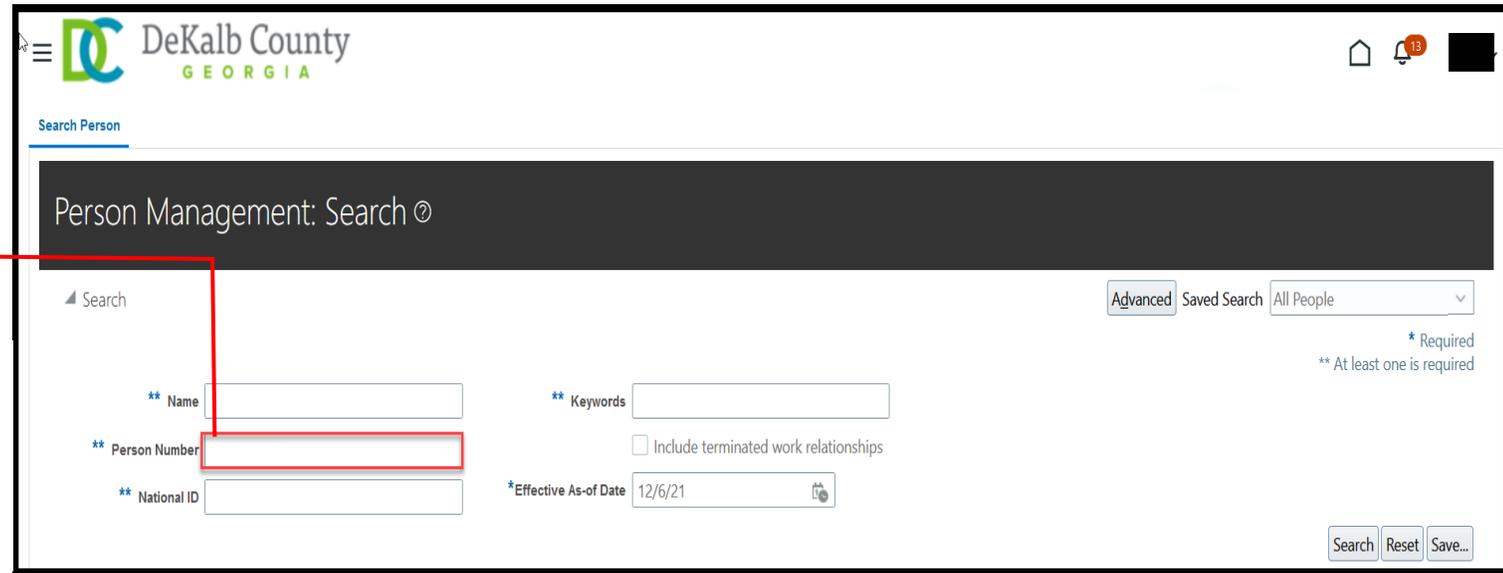
Select the Person Management tile within the Apps area



Manage Employment: Update an Employee's Assignment Details

3

From the Person Management: Search page, key the **Name** or **Employee Number** of the Employee



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

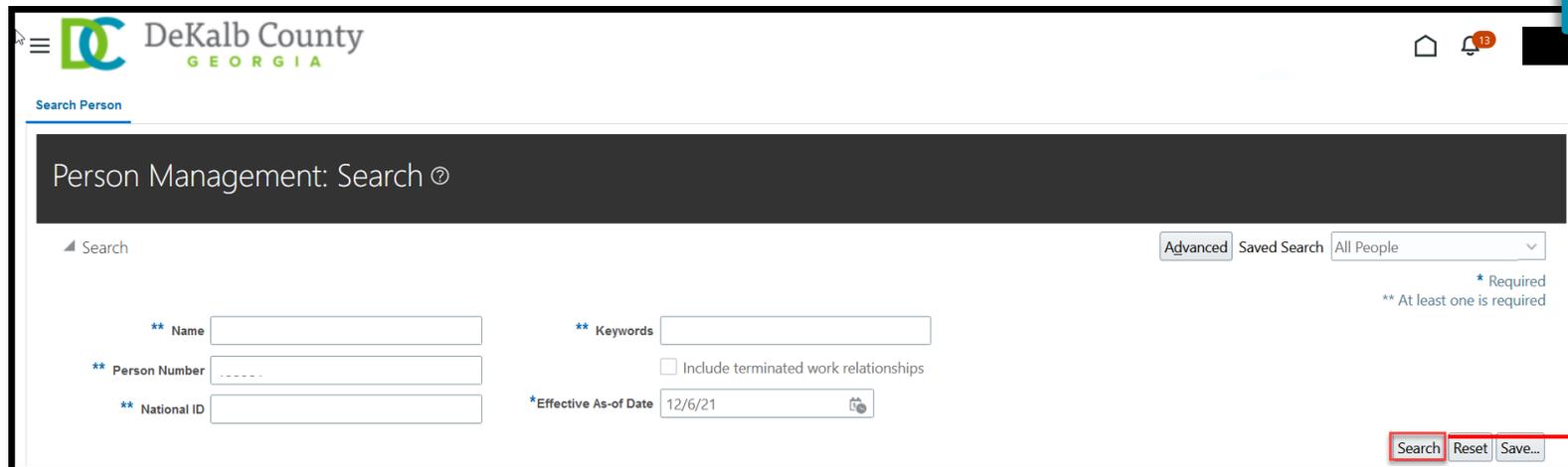
** Keywords

** Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

** Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...

Employees may be searched by Name, Person Number, or by Keywords

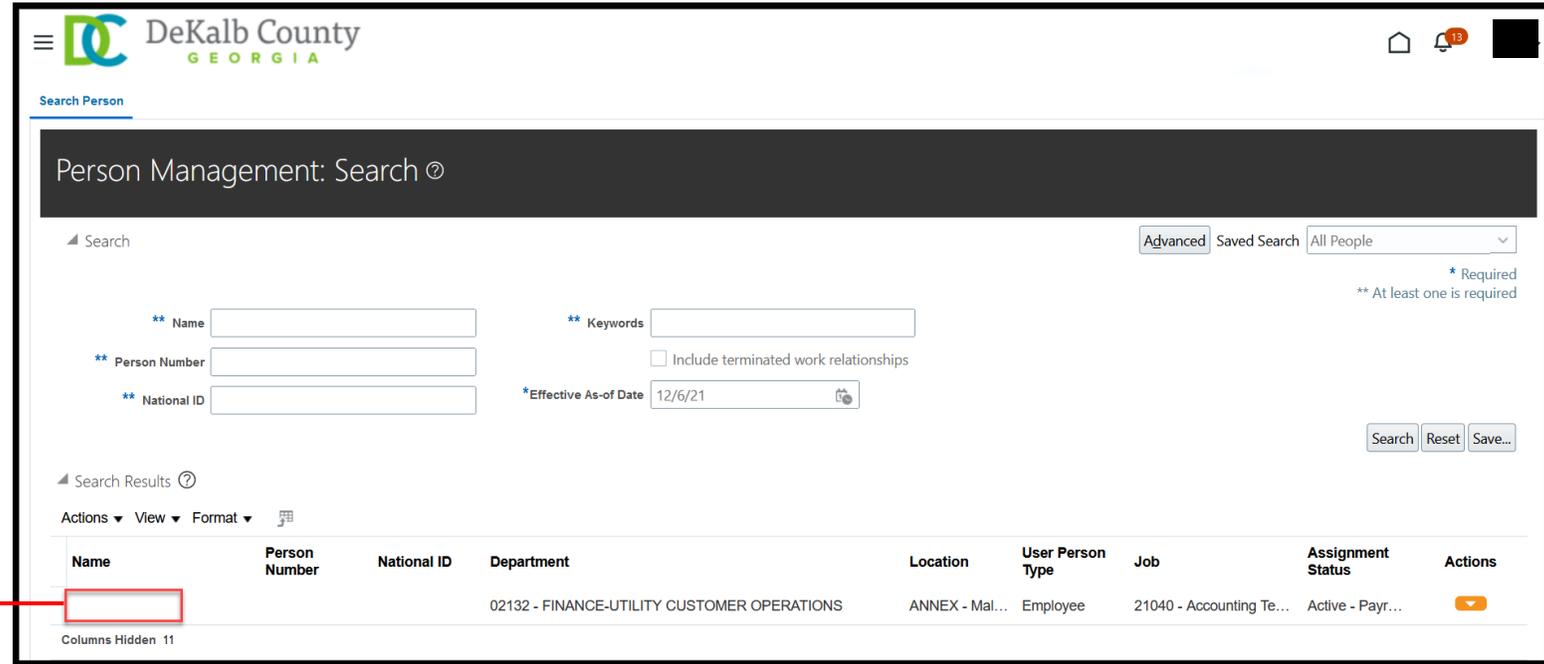
4

Select the Search button

Manage Employment: Update an Employee's Assignment Details

5

From the Search Results section, select the Employee's Name link



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name ** Keywords

** Person Number

** National ID *Effective As-of Date 12/6/21

Include terminated work relationships

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11



Employment x

Employment Done

Work Relationship

Legal Employer DeKalb County GA Country United States

Worker Type Employee

Hire Date 1/1/20

Assignment: 21040 - Accounting Technician, Senior

Action Hire Effective Start Date 1/1/20 (1 of 1)

Edit View History

Update

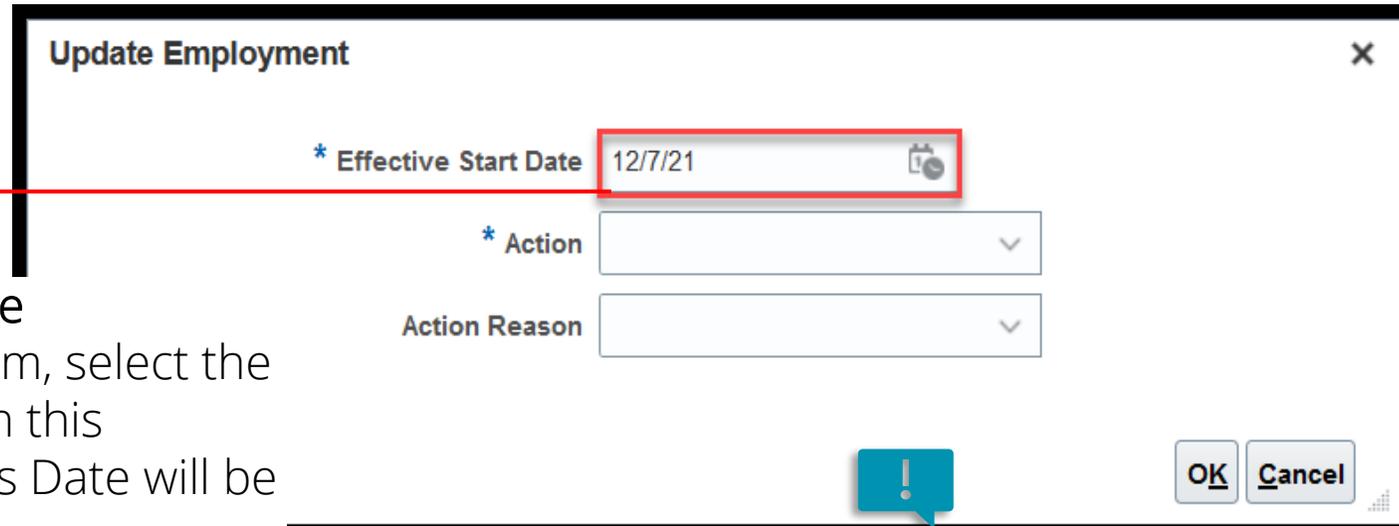
6

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

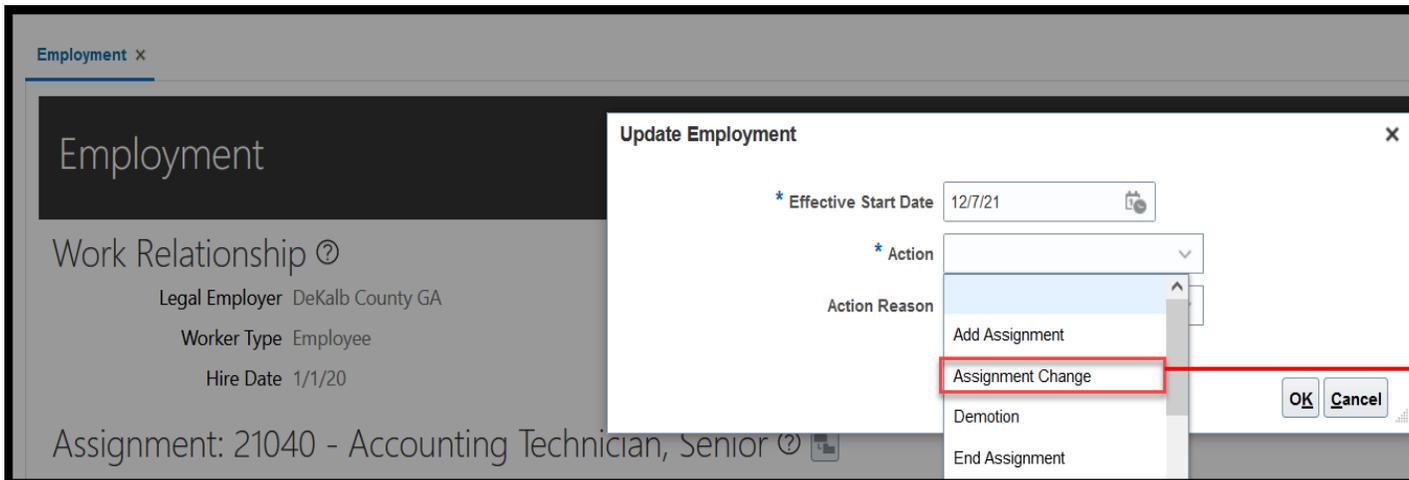
Manage Employment: Update an Employee's Assignment Details

7

From the Update Employment form, select the **Effective Date**. In this example, Today's Date will be selected



The Calendar icon may also be used to select the Date

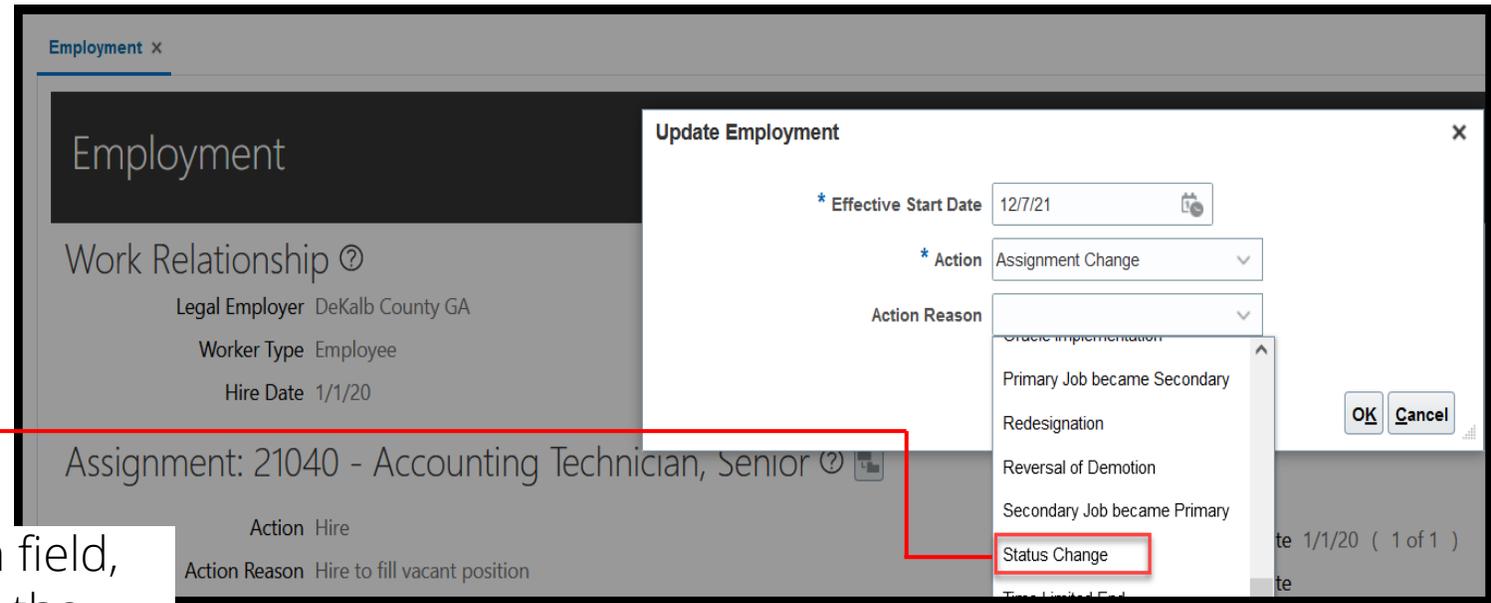


8

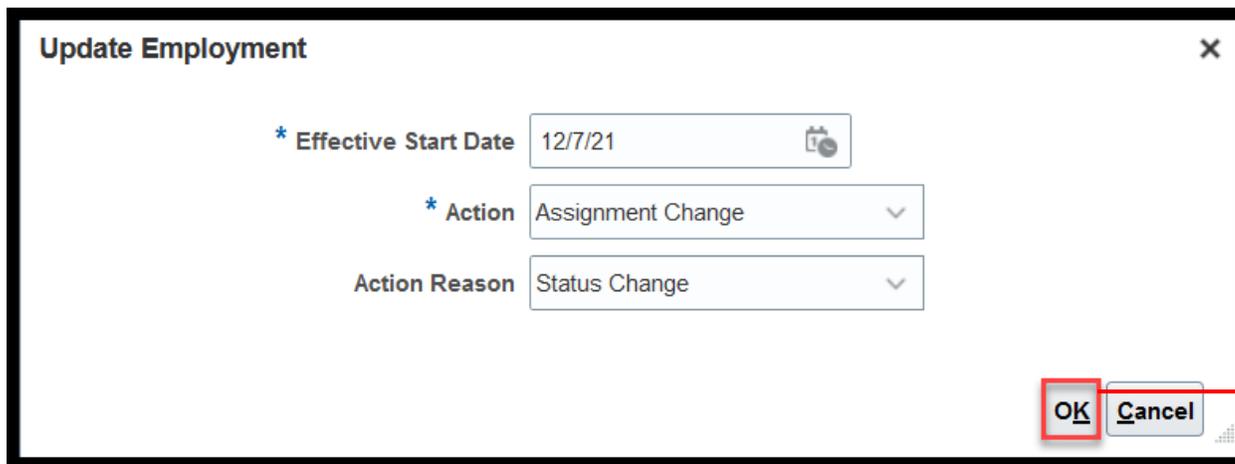
From the Action field, select **Assignment Change** from the drop-down list

Manage Employment: Update an Employee's Assignment Details

9



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



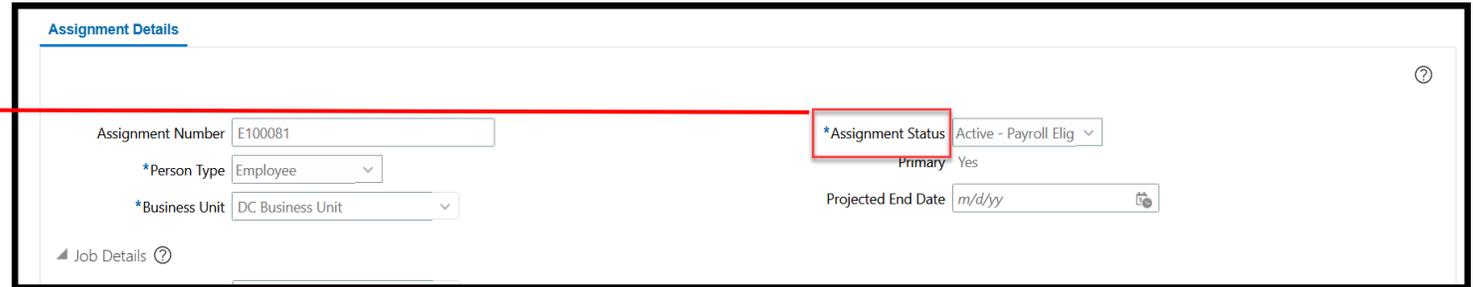
10

Select the OK button

Manage Employment: Update an Employee's Assignment Details

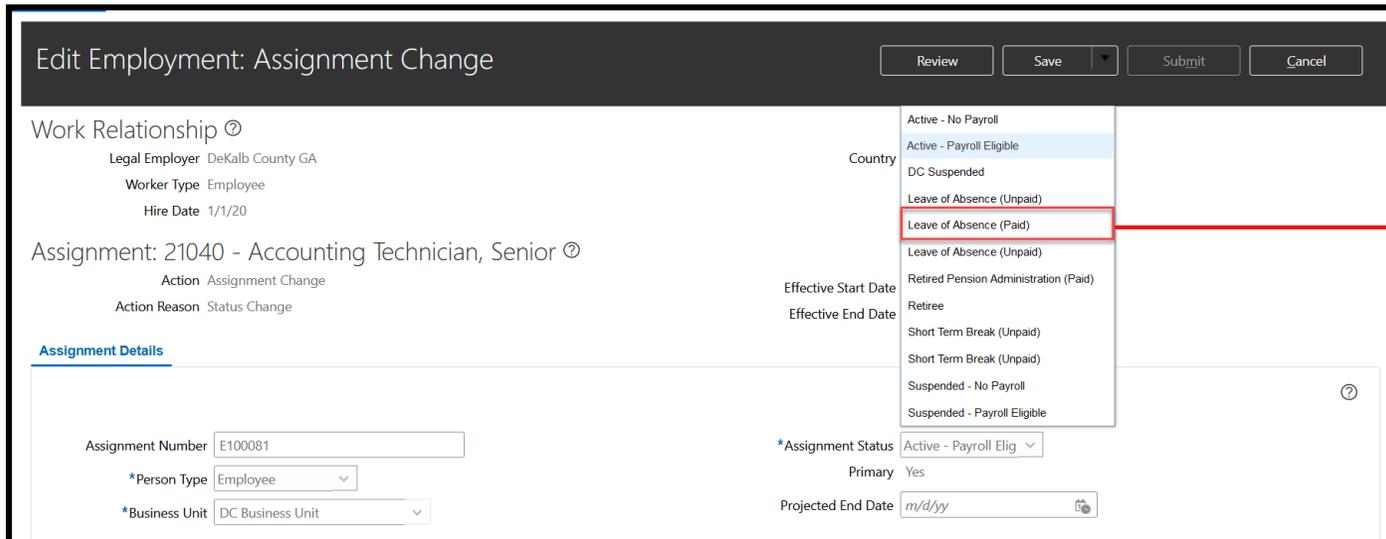
11

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



The screenshot shows the 'Assignment Details' form with the following fields:

- Assignment Number: E100081
- *Person Type: Employee
- *Business Unit: DC Business Unit
- *Assignment Status: Active - Payroll Elig (highlighted with a red box)
- Primary: Yes
- Projected End Date: m/d/yy



The screenshot shows the 'Edit Employment: Assignment Change' form with the following sections:

- Work Relationship**: Legal Employer (DeKalb County GA), Worker Type (Employee), Hire Date (1/1/20)
- Assignment: 21040 - Accounting Technician, Senior**: Action (Assignment Change), Action Reason (Status Change)
- Assignment Details**: Assignment Number (E100081), *Person Type (Employee), *Business Unit (DC Business Unit)
- Assignment Status**: Active - Payroll Elig (dropdown menu open, 'Leave of Absence (Paid)' selected)
- Primary**: Yes
- Projected End Date**: m/d/yy

12

Select **Leave of Absence (Paid)** from the drop-down list

Manage Employment: Update an Employee's Assignment Details

13 Select the Review button

Edit Employment: Assignment Change

Work Relationship ⓘ
 Legal Employer DeKalb County GA Country United States
 Worker Type Employee
 Hire Date 1/1/20

14 Review the Current and Proposed Values of the Assignment Status change. If everything looks right, select the Submit button

Edit Employment: Review

Work Relationship ⓘ
 Legal Employer DeKalb County GA Country United States
 Worker Type Employee
 Hire Date 1/1/20

Action
 Action Assignment Change Effective Start Date 12/7/21 (1 of 1)
 Action Reason Status Change Effective End Date

Assignment: 21040 - Accounting Technician, Senior

Assignment Details

Attribute	Current Value	Proposed Value
Assignment Status	Active - Payroll Eligible	Leave of Absence (Paid)



The submission will go through an approval process. Once it has been reviewed and approved by all approvers, it will be committed to the database

Manage Employment: Update an Employee's Assignment Details



15

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



CloudVergent 360

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

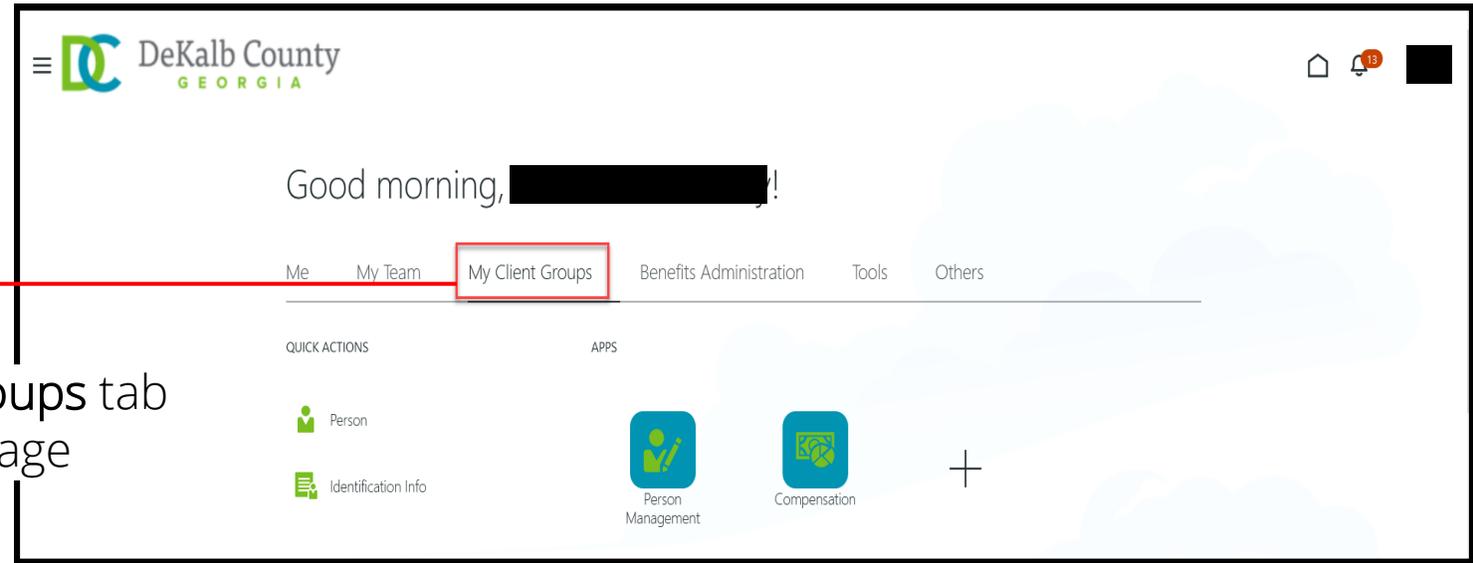


Seniority Dates are calculated dates that provide the length of service an employee has been with DeKalb County. These dates would house the Employee's Latest Start Date as well as his/her Original Date of Hire

Manage Employment: View an Employee's Seniority Dates Details

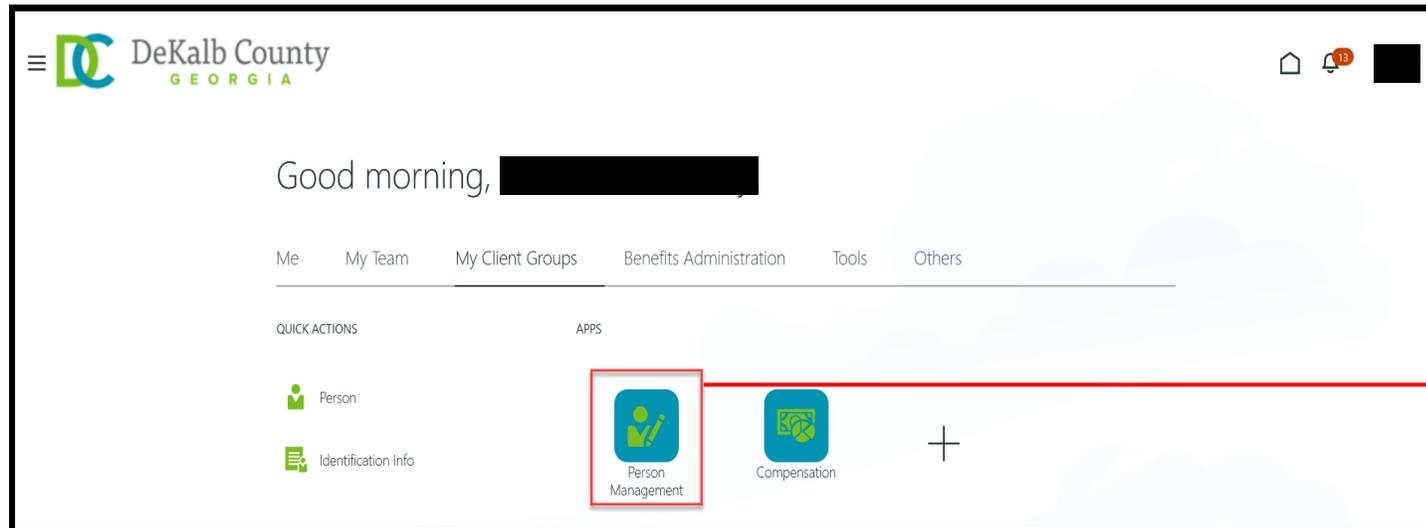
1

Select the My Client Groups tab from the CV360 homepage



2

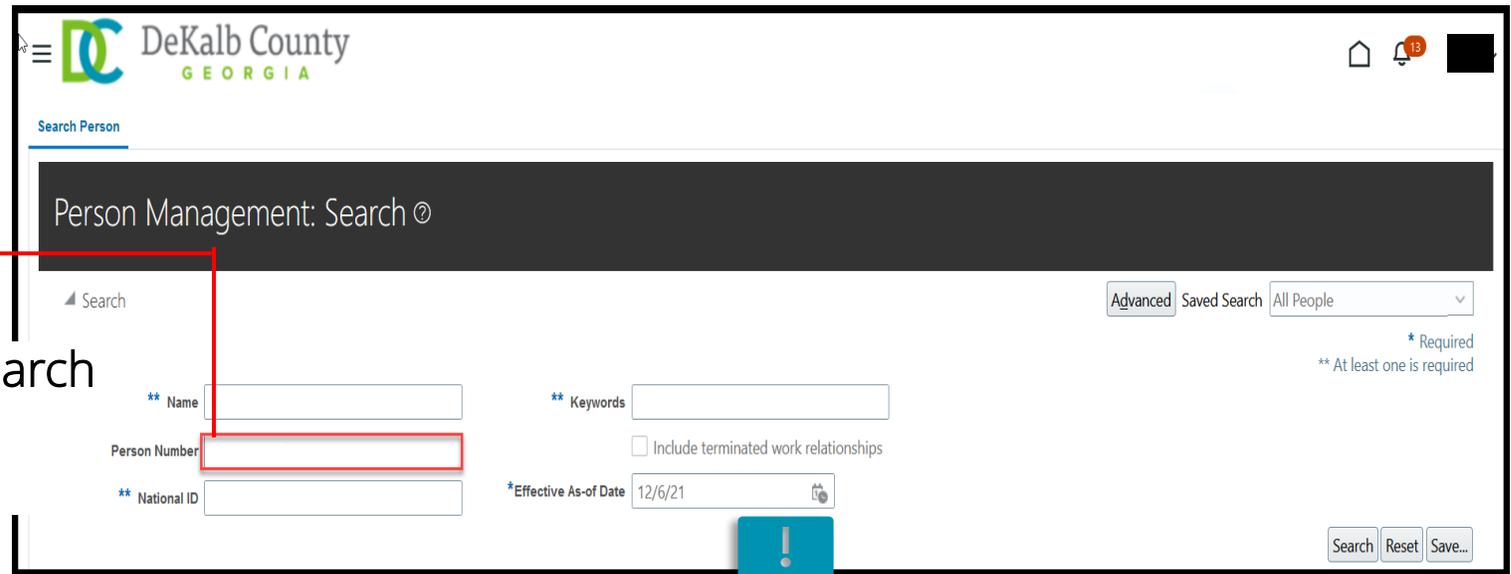
Select the Person Management tile within the Apps area



Manage Employment: View an Employee's Seniority Dates Details

3

From the Person Management: Search page, key the **Name** or **Employee Number** of the Employee



DeKalb County GEORGIA

Search Person

Person Management: Search ©

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

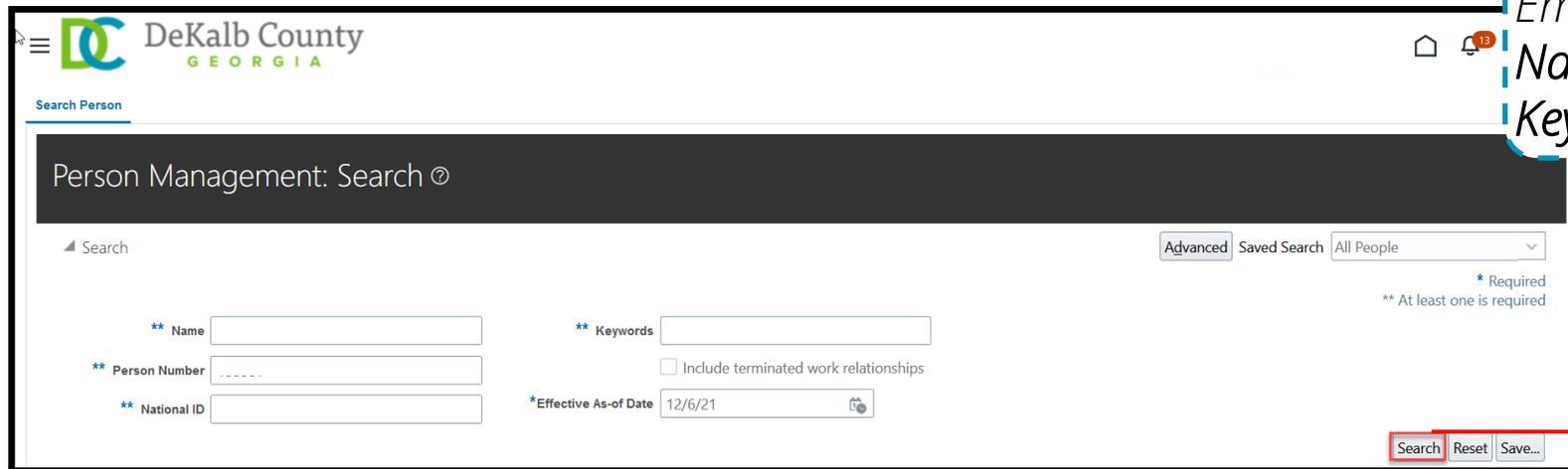
Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...

Employees may be searched by Name, Person Number, or by Keywords



DeKalb County GEORGIA

Search Person

Person Management: Search ©

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

** Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...

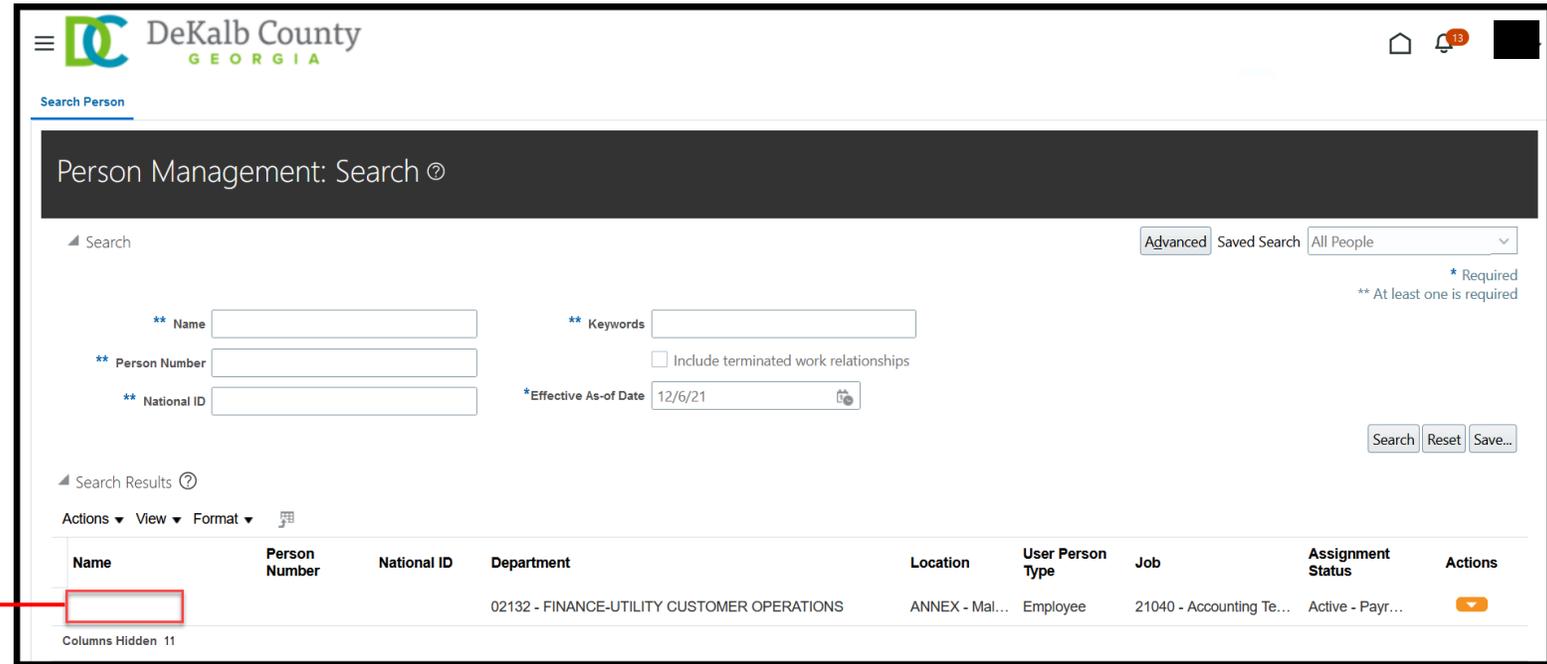
4

Select the Search button

Manage Employment: View an Employee's Seniority Dates Details

5

From the Search Results section, select the Employee's Name link



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

** Person Number

Include terminated work relationships

** National ID

* Effective As-of Date 12/6/21

Search Reset Save...

Search Results

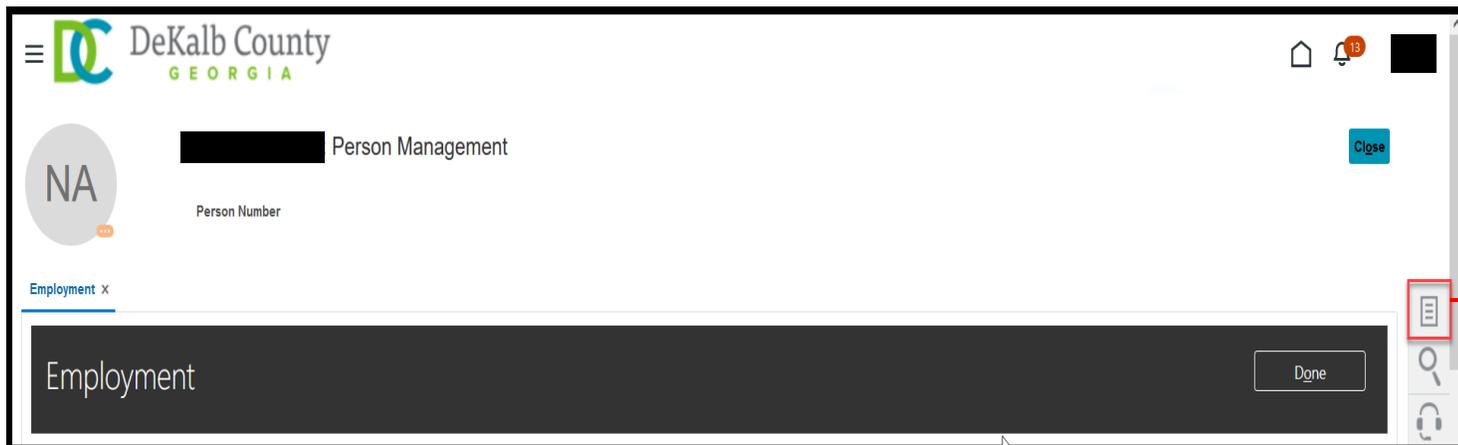
Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
[Redacted]			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11

6

From the Employment page, select the Panel Drawer icon



DeKalb County GEORGIA

Person Management

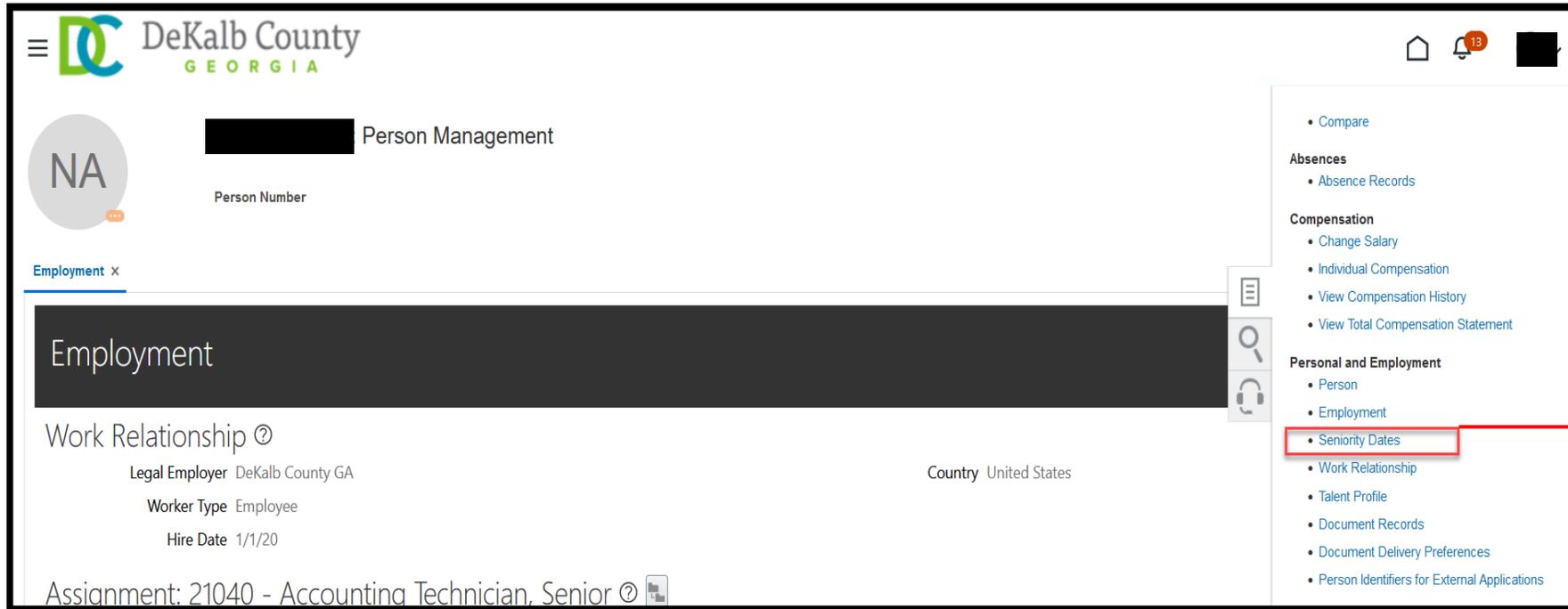
Person Number

Employment x

Employment

Done

Manage Employment: View an Employee's Seniority Dates Details



The screenshot shows the DeKalb County Georgia HR system interface. The top left features the DeKalb County logo and the text 'DeKalb County GEORGIA'. Below this is a user profile with initials 'NA' and a 'Person Management' section. The main content area is titled 'Employment' and displays 'Work Relationship @' with details: 'Legal Employer DeKalb County GA', 'Worker Type Employee', 'Hire Date 1/1/20', and 'Country United States'. At the bottom, it shows 'Assignment: 21040 - Accounting Technician, Senior @'. On the right, a panel drawer is open, listing various options. The 'Personal and Employment' section is expanded, and the 'Seniority Dates' link is highlighted with a red box. A red line connects this link to a blue circle containing the number '7'.

7

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

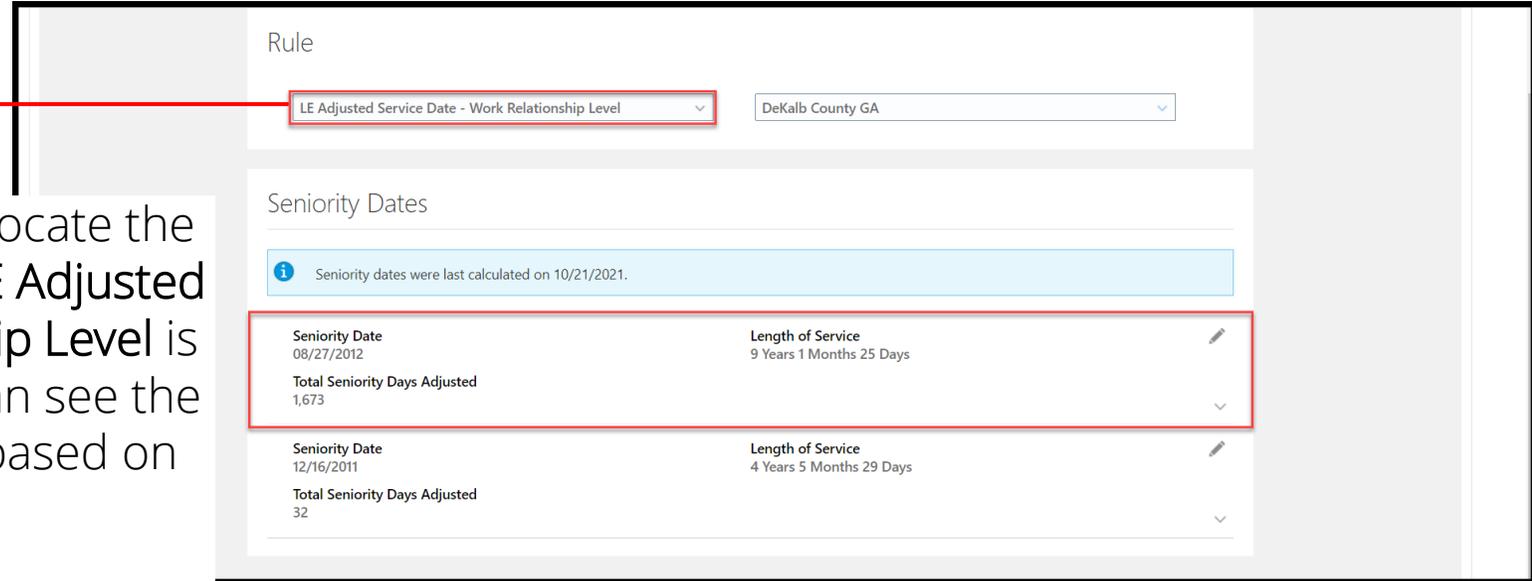


Two Seniority Dates the Coordinator would be most interested in reviewing would be the LE Adjusted Service Date which is also known as the Latest Start Date and the Enterprise Seniority Date which is also known as the Original Date of Hire

Manage Employment: View an Employee's Seniority Dates Details

8

From the **Seniority Dates** tab, locate the **Rule** section. By default, the **LE Adjusted Service Date- Work Relationship Level** is populated. The Coordinator can see the Employee's **Length of Service** based on the Employee's current **Work Relationship**



Rule

LE Adjusted Service Date - Work Relationship Level

DeKalb County GA

Seniority Dates

Seniority dates were last calculated on 10/21/2021.

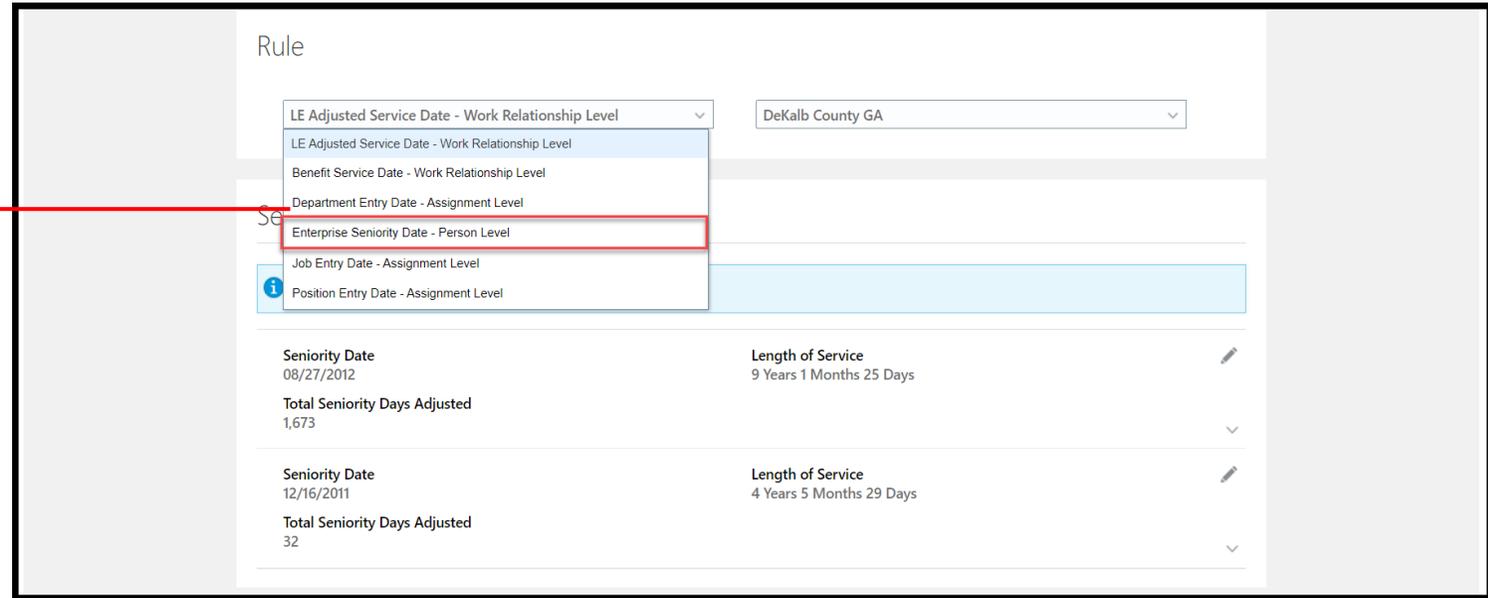
Seniority Date 08/27/2012	Length of Service 9 Years 1 Month 25 Days	
Total Seniority Days Adjusted 1,673		
Seniority Date 12/16/2011	Length of Service 4 Years 5 Months 29 Days	
Total Seniority Days Adjusted 32		

*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*

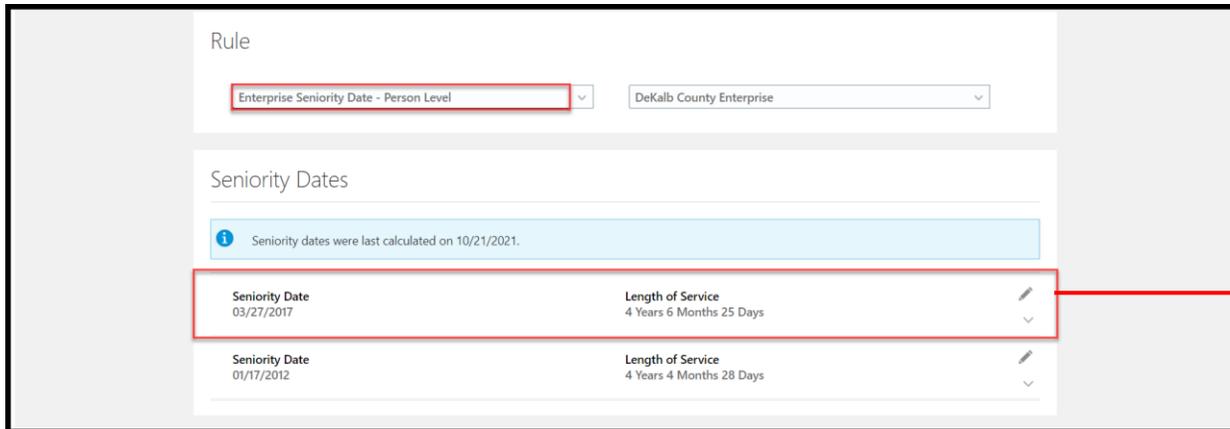
Manage Employment: View an Employee's Seniority Dates Details

9

To review the Employee's Enterprise Seniority Date or Original Date of Hire, select **Enterprise Seniority Date** from the drop-down list in the Rule section



Seniority Date	Length of Service
08/27/2012	9 Years 1 Months 25 Days
12/16/2011	4 Years 5 Months 29 Days

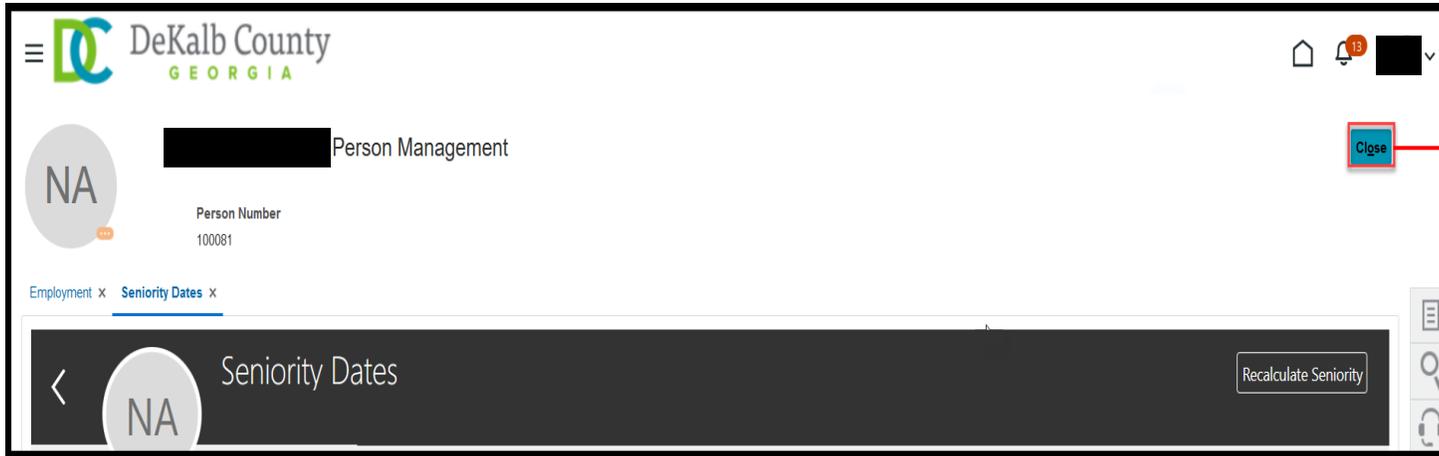


Seniority Date	Length of Service
03/27/2017	4 Years 6 Months 25 Days
01/17/2012	4 Years 4 Months 28 Days

10

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

Manage Employment: View an Employee's Seniority Dates Details



11

Once the Coordinator has completed reviewing the employee's Seniority Dates, 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 3: View an Employee's Work Relationship Details



CloudVergent 360

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

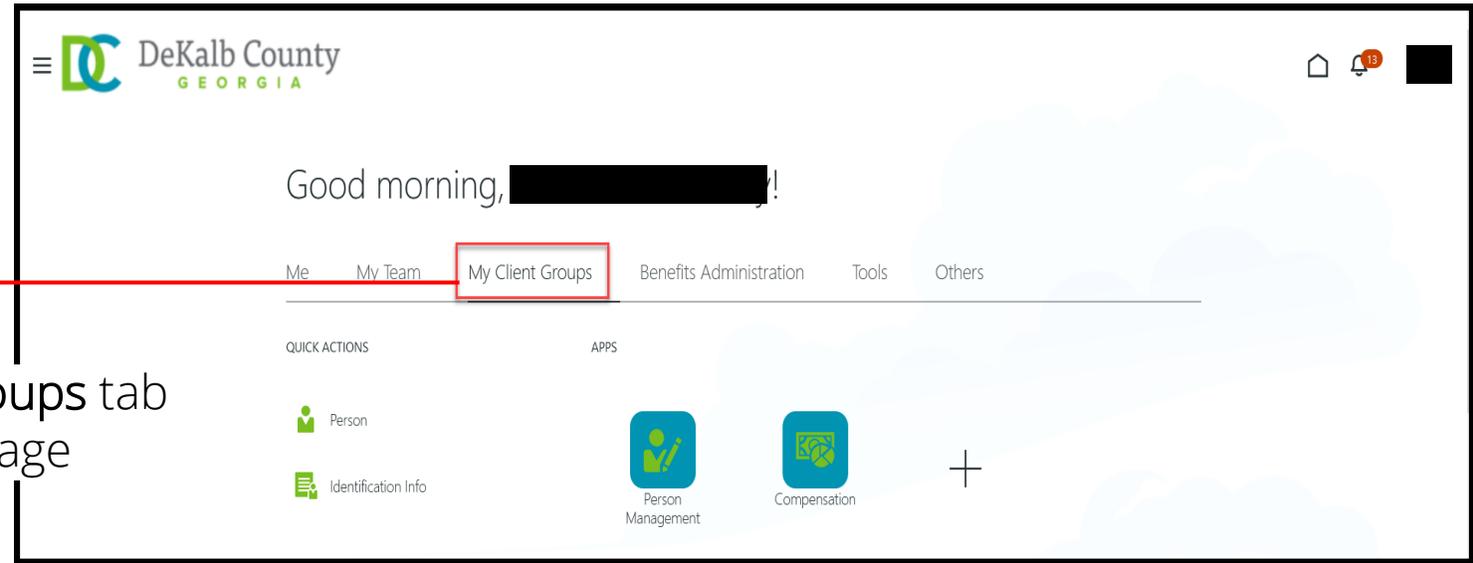


Work Relationship is the relationship that an Employee has with DeKalb County. An Employee can only have a single Work Relationship at one time. The details include the Length of Service the Employee has been in the Work Relationship

Manage Employment: View an Employee's Work Relationship Details

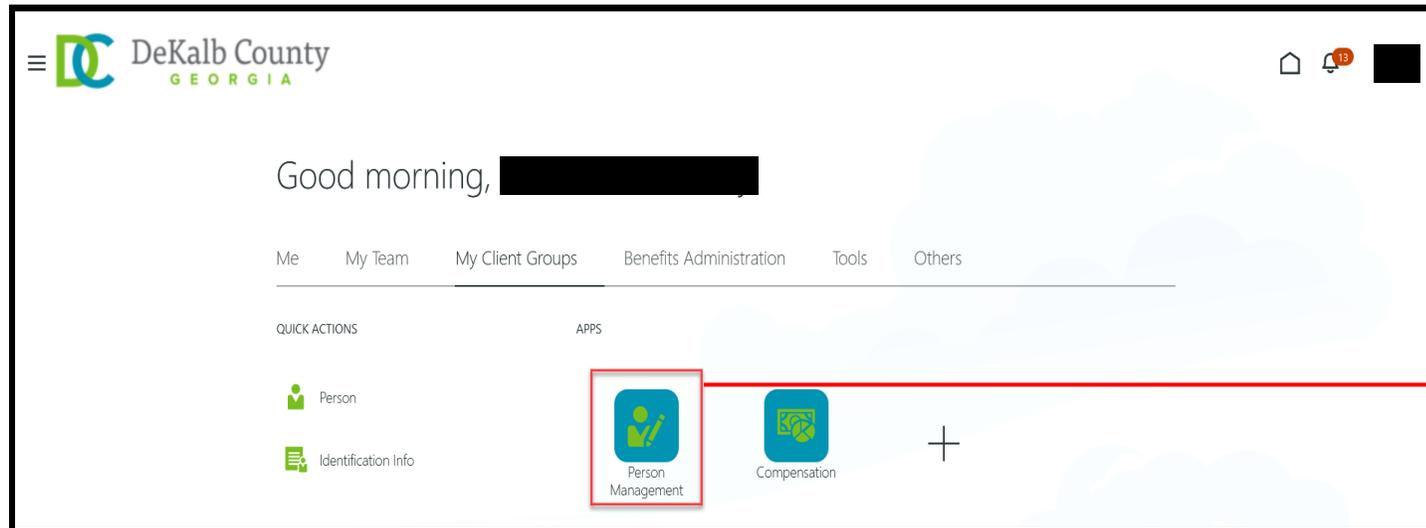
1

Select the **My Client Groups** tab from the CV360 homepage



2

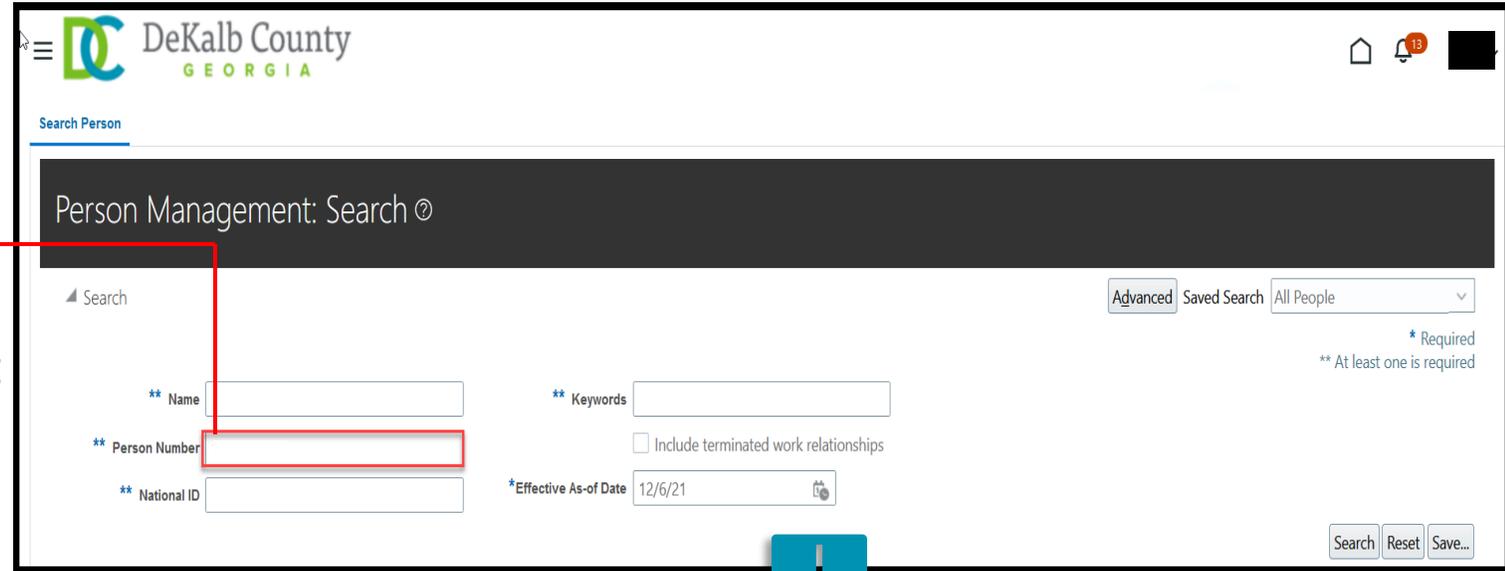
Select the **Person Management** tile within the Apps area



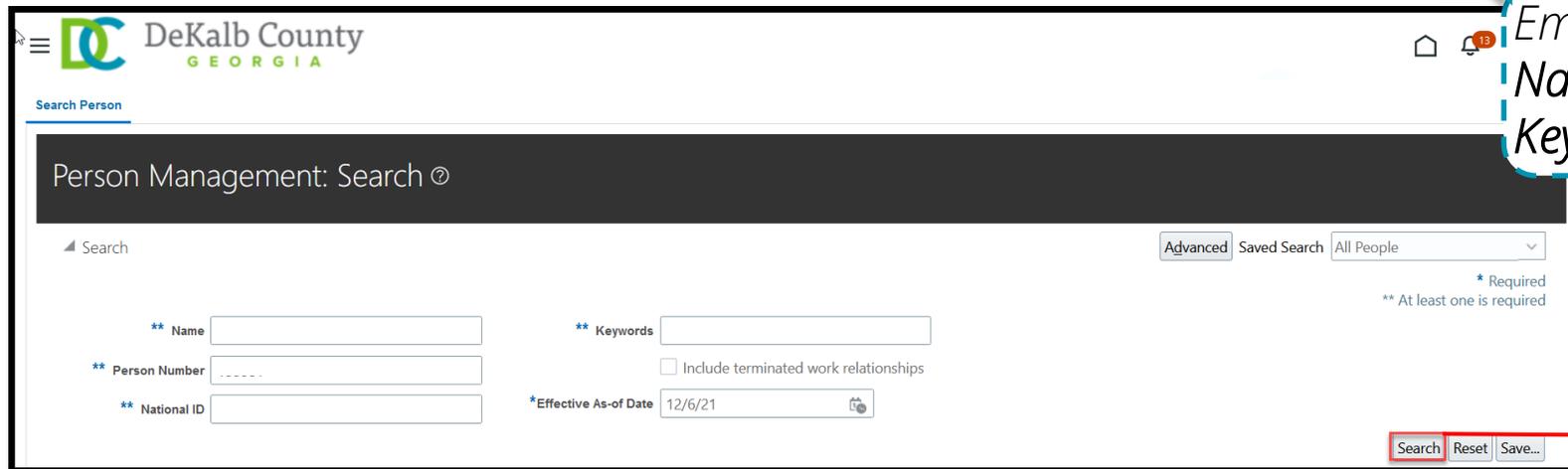
Manage Employment: View an Employee's Work Relationship Details

3

From the Person Management: Search page, key the **Name** or **Employee Number** of the Employee



The screenshot shows the 'Person Management: Search' page. The search form includes fields for Name, Person Number, National ID, and Keywords. The 'Person Number' field is highlighted with a red box. There are also buttons for 'Advanced', 'Saved Search', and 'All People'. A search button is located at the bottom right.



The screenshot shows the 'Person Management: Search' page. The search form includes fields for Name, Person Number, National ID, and Keywords. The 'Search' button is highlighted with a red box. There are also buttons for 'Advanced', 'Saved Search', and 'All People'. A search button is located at the bottom right.

Employees may be searched by **Name, Person Number, or by Keywords**

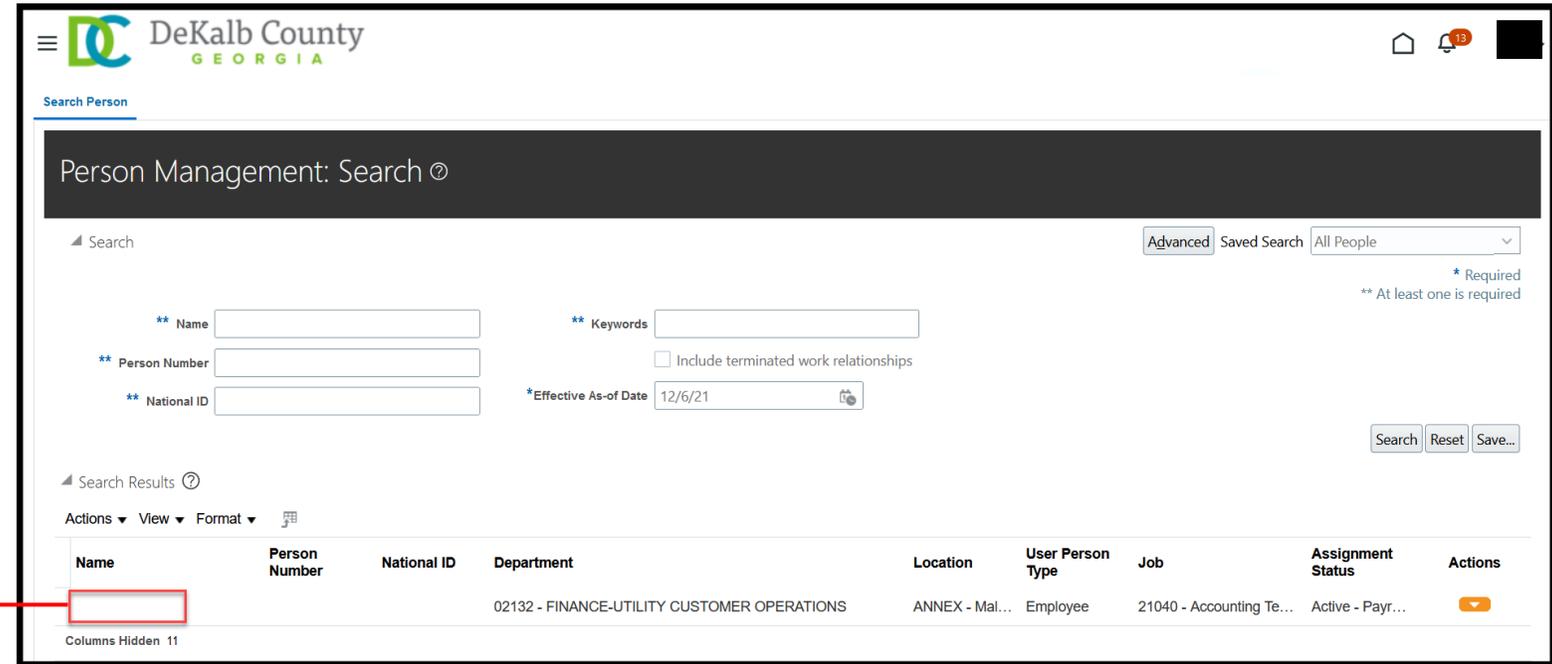
4

Select the Search button

Manage Employment: View an Employee's Work Relationship Details

5

From the Search Results section, select the Employee's Name link



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name ** Keywords

** Person Number Include terminated work relationships

** National ID *Effective As-of Date 12/6/21

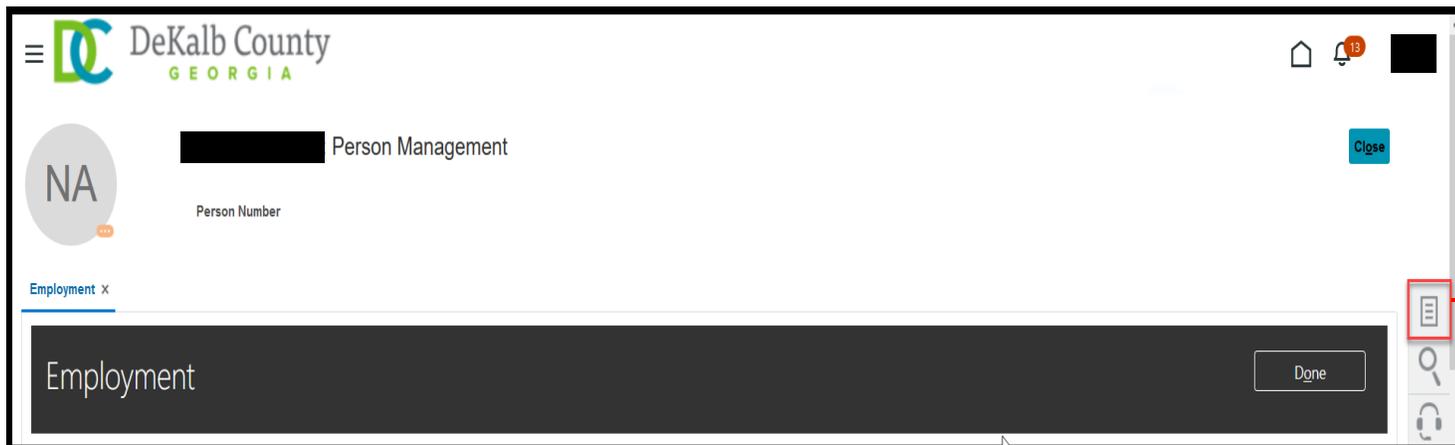
Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
[Redacted]			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11



DeKalb County GEORGIA

Person Management

Person Number

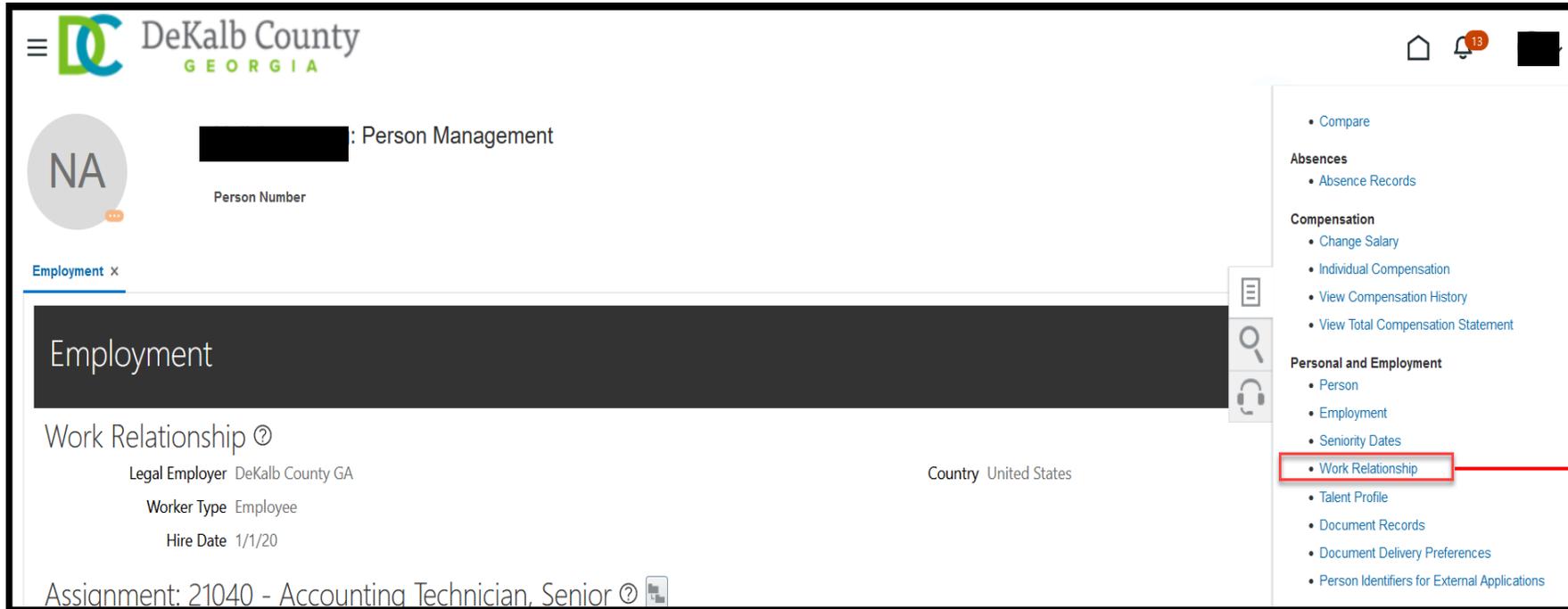
Employment x

Employment Done

6

From the Employment page, select the Panel Drawer icon

Manage Employment: View an Employee's Work Relationship Details



DeKalb County
GEORGIA

NA : Person Management
Person Number

Employment x

Employment

Work Relationship ⓘ

Legal Employer DeKalb County GA
Worker Type Employee
Hire Date 1/1/20

Country United States

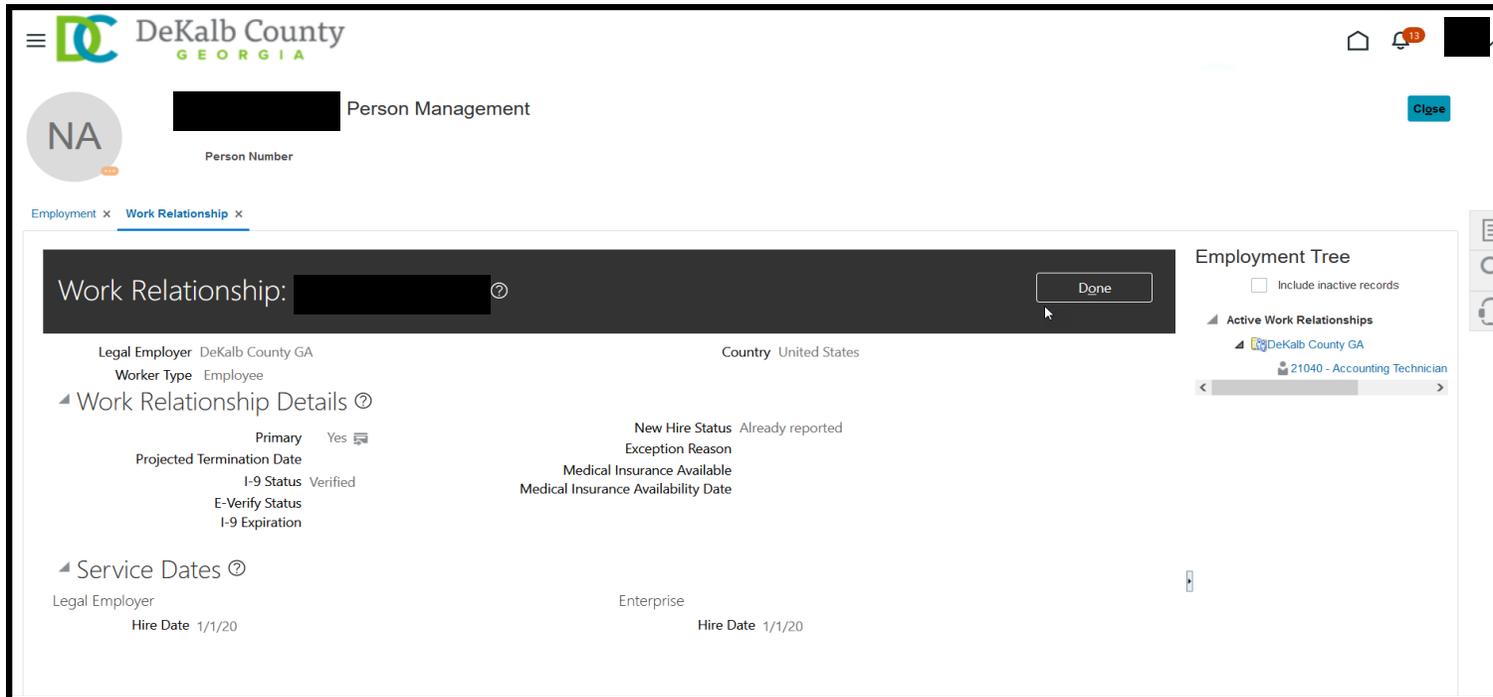
Assignment: 21040 - Accounting Technician, Senior ⓘ

- Compare
- Absences**
 - Absence Records
- Compensation**
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement
- Personal and Employment**
 - Person
 - Employment
 - Seniority Dates
 - **Work Relationship**
 - Talent Profile
 - Document Records
 - Document Delivery Preferences
 - Person Identifiers for External Applications

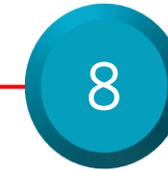


Once the Panel Drawer opens, select the **Work Relationship** link from the **Personal and Employment** section

Manage Employment: View an Employee's Work Relationship Details

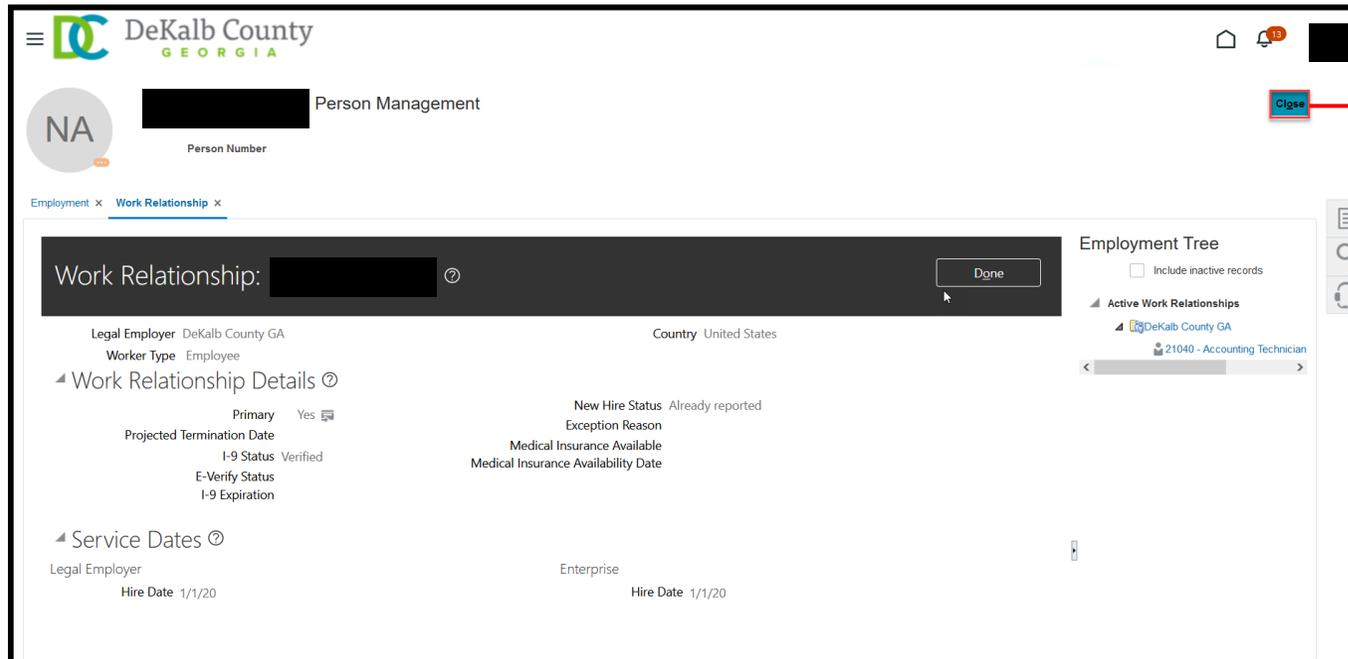


The screenshot displays the 'Person Management' interface for DeKalb County Georgia. The 'Work Relationship' tab is active, showing details for a specific employee. The interface includes a header with the DeKalb County logo and navigation options. The main content area is divided into several sections: 'Work Relationship Details' with fields for 'Legal Employer' (DeKalb County GA), 'Worker Type' (Employee), 'Country' (United States), 'New Hire Status' (Already reported), 'Exception Reason', 'Medical Insurance Available', and 'Medical Insurance Availability Date'; 'Service Dates' with 'Legal Employer' and 'Enterprise' sections, both showing a 'Hire Date' of 1/1/20; and an 'Employment Tree' on the right side showing a hierarchy of active work relationships, including 'DeKalb County GA' and '21040 - Accounting Technician'. A 'Done' button is visible at the top right of the details section.



From the **Work Relationship** tab, the Coordinator can review the Work Relationship details

Manage Employment: View an Employee's Work Relationship Details



9

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



CloudVergent 360

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

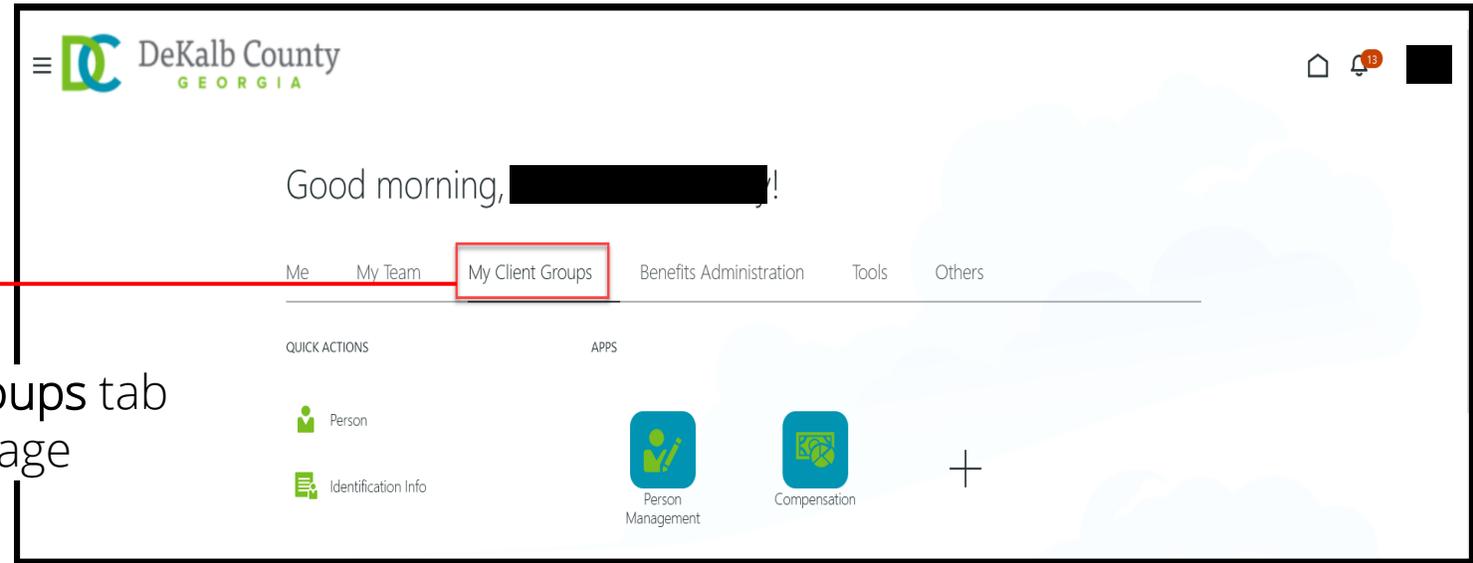


Talent Profile serves as an internal resume, enabling Employees to create and maintain a profile that includes Career/Work Experience, Educational Background, Certifications, Skills, Professional Affiliations, and Achievements

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

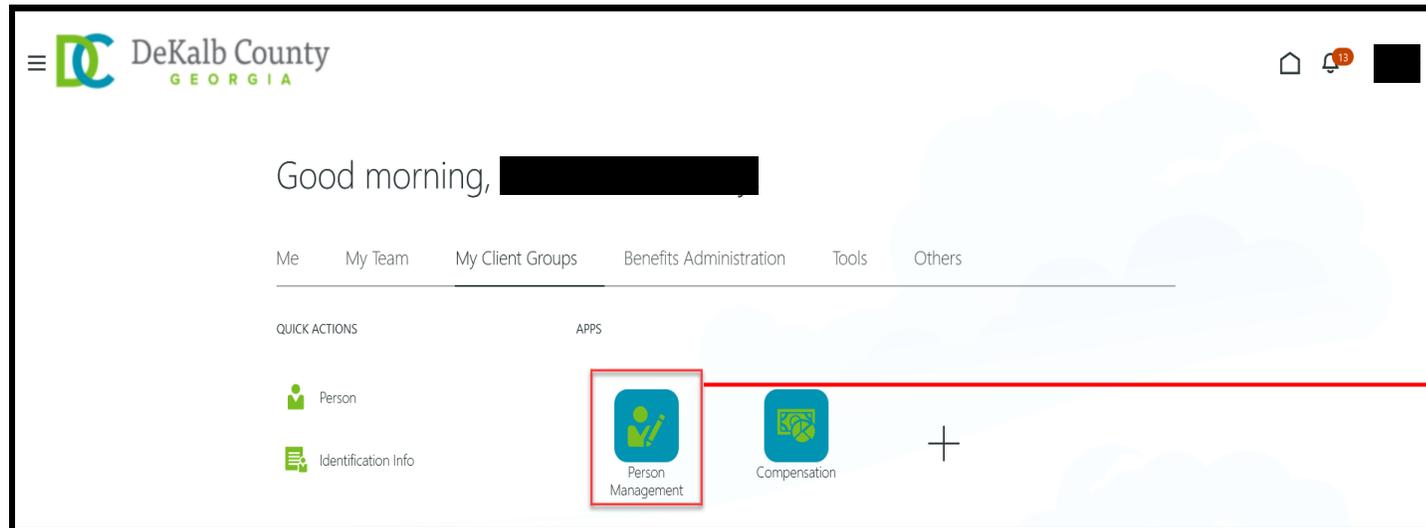
1

Select the My Client Groups tab from the CV360 homepage



2

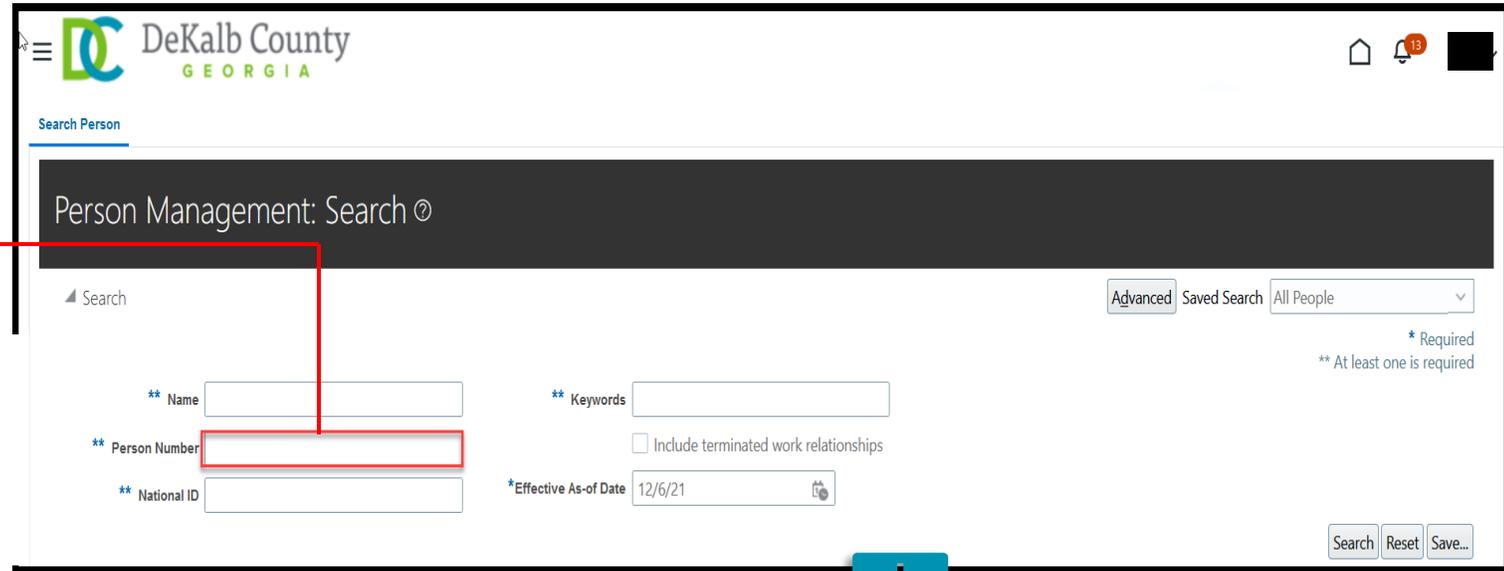
Select the Person Management tile within the Apps area



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

3

From the Person Management: Search page, key the Name or Employee Number of the Employee



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

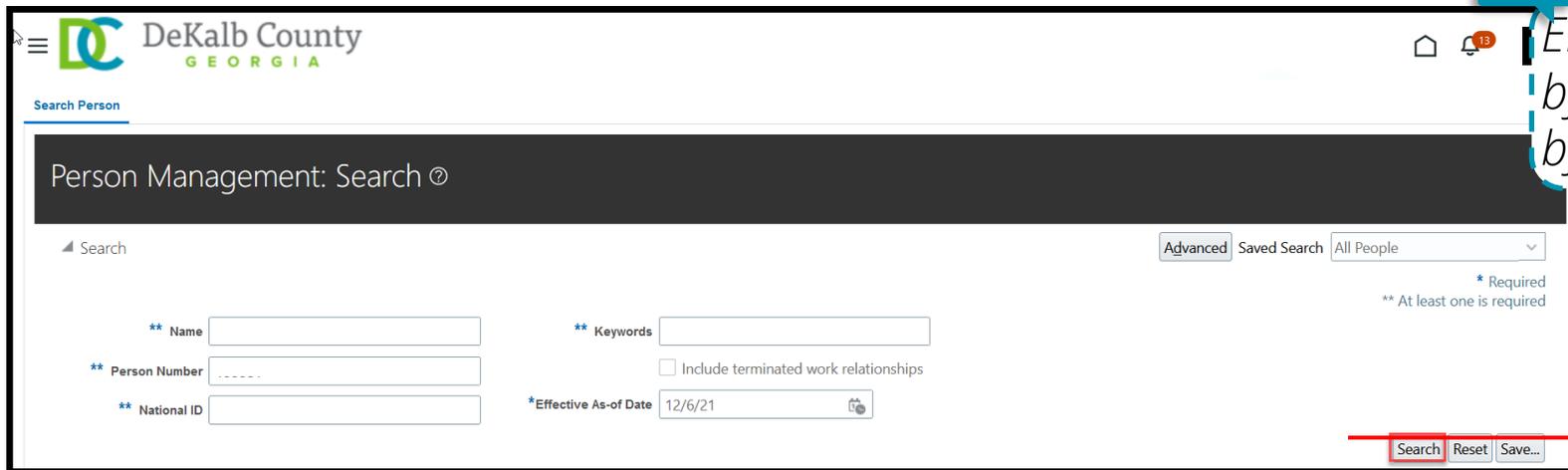
** Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...

Employees may be searched by Name, Person Number, or by Keywords



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

** Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...

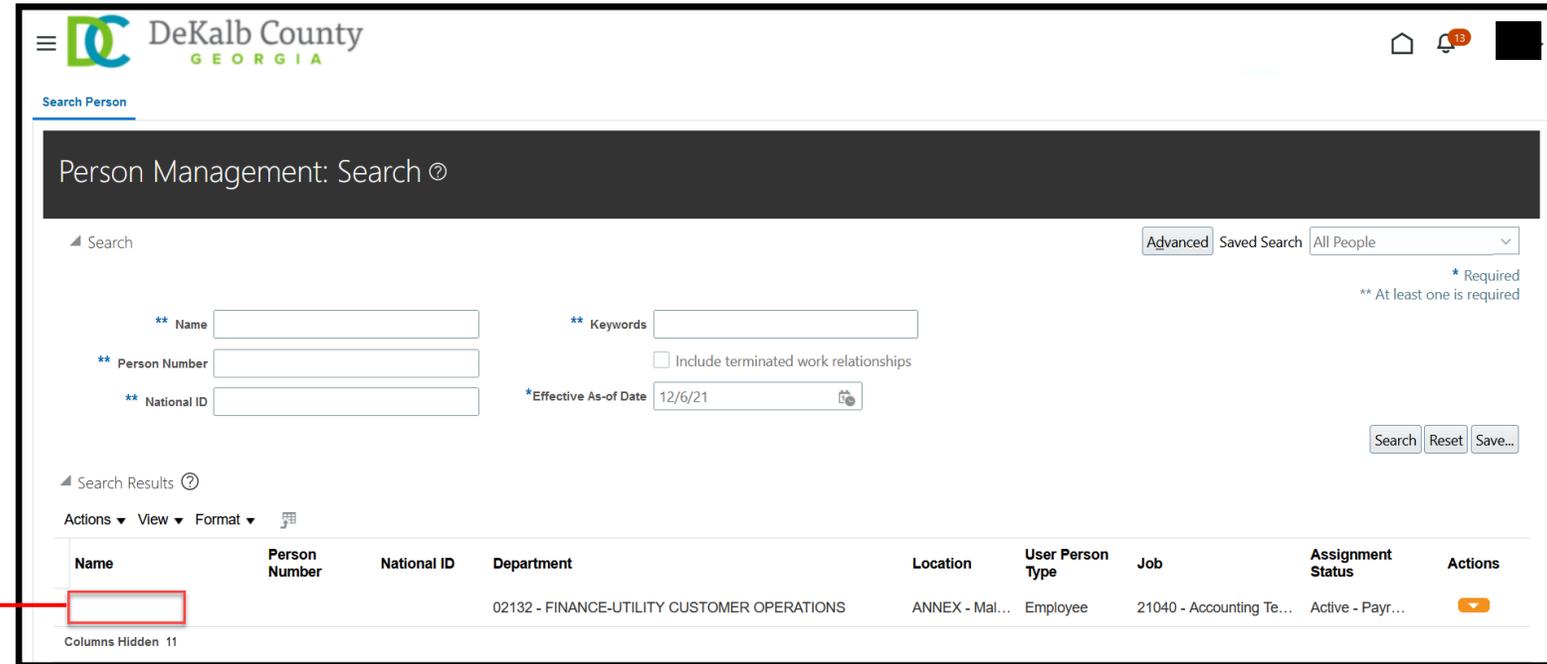
4

Select the Search button

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

5

From the Search Results section, select the employee's name link



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name ** Keywords

** Person Number Include terminated work relationships

** National ID *Effective As-of Date 12/6/21

Search Reset Save...

Search Results

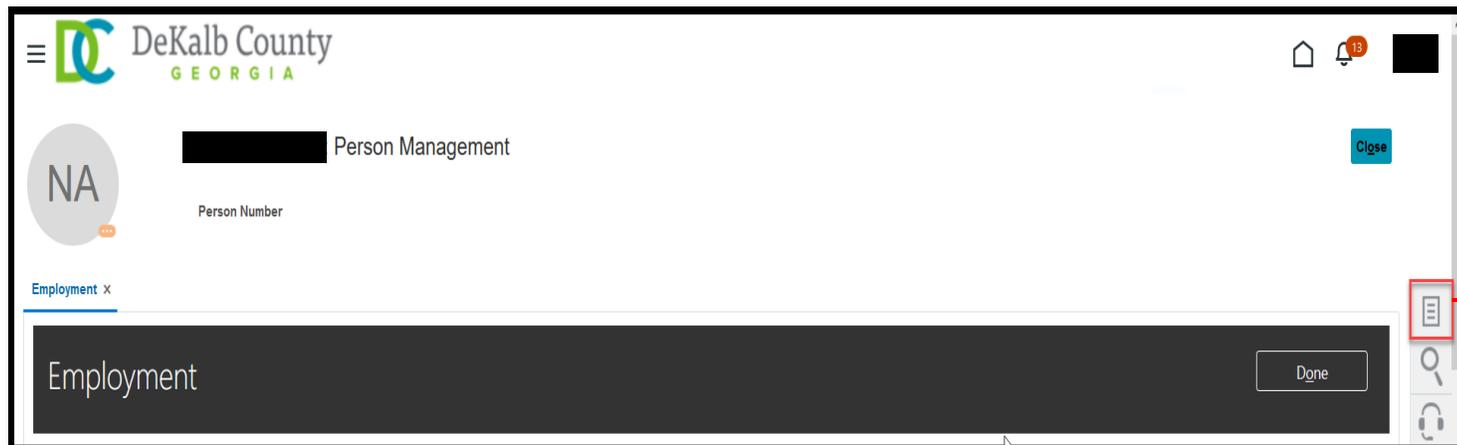
Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
[Red Box]			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11

6

From the Employment page, select the Panel Drawer icon



DeKalb County GEORGIA

Person Management

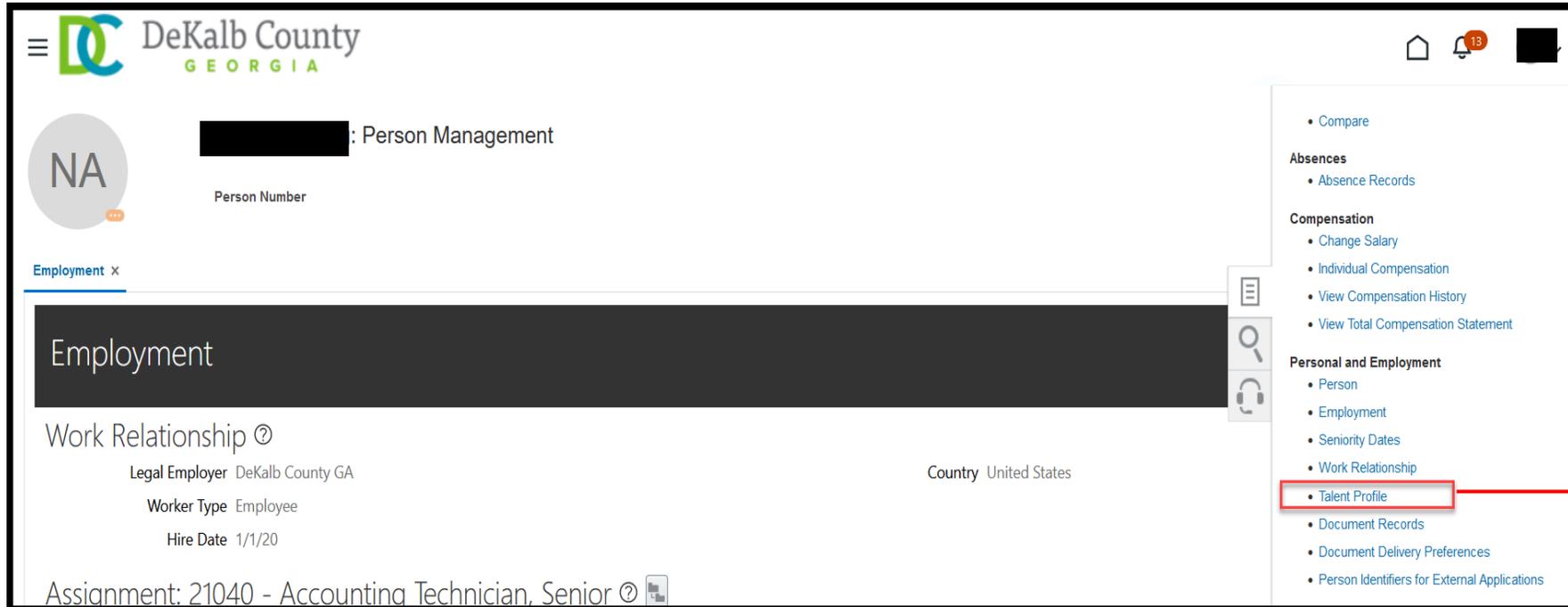
Person Number

Employment x

Employment

Done

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

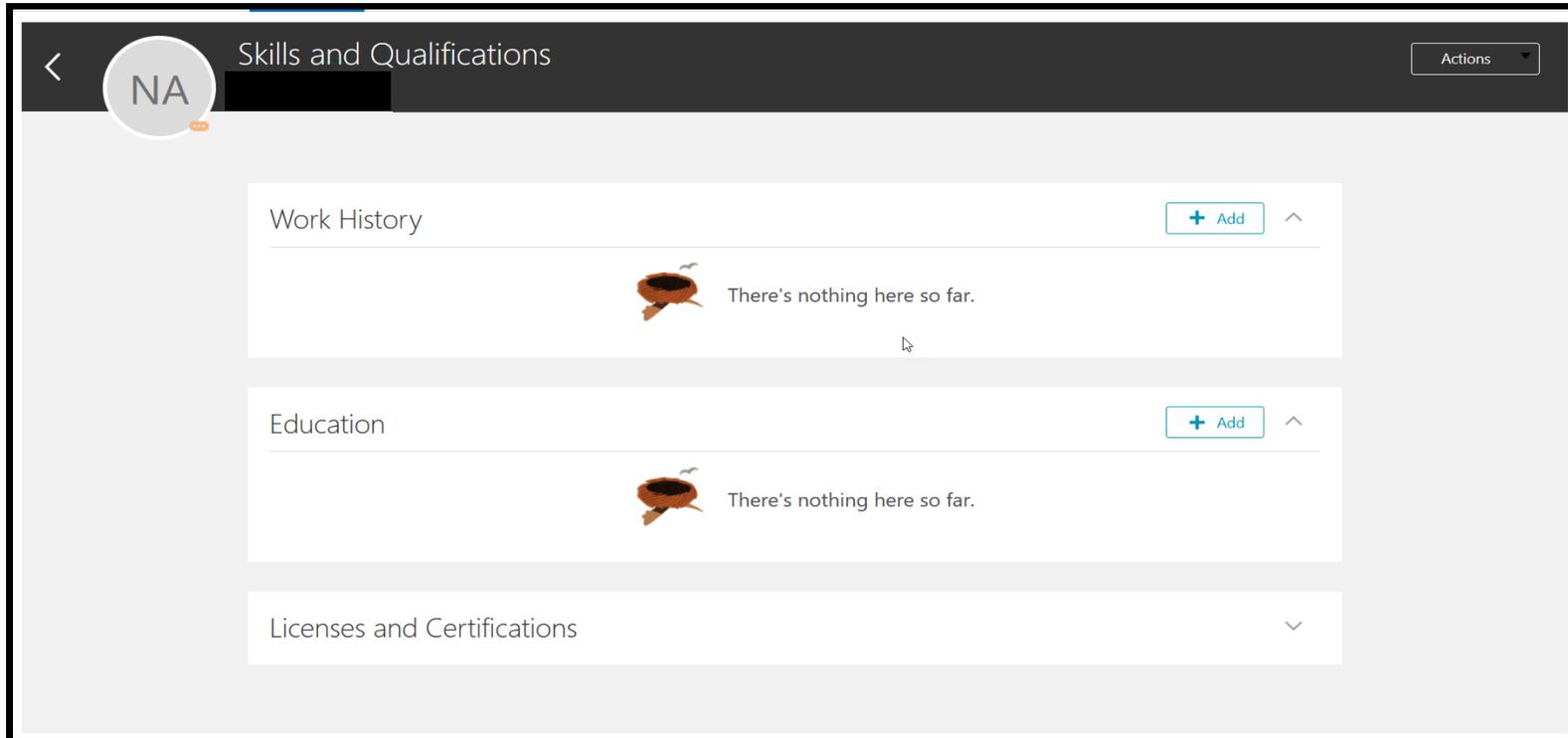


The screenshot shows the DeKalb County Georgia HR system interface. At the top left is the DeKalb County Georgia logo. The main header area includes a user profile icon with 'NA' and a 'Person Management' link. Below this is an 'Employment' tab. The main content area displays 'Work Relationship' details: Legal Employer (DeKalb County GA), Worker Type (Employee), Hire Date (1/1/20), and Country (United States). On the right side, a 'Panel Drawer' is open, showing a list of navigation options. The 'Personal and Employment' section is expanded, and the 'Talent Profile' link is highlighted with a red box. A red line connects this box to a blue circle containing the number '7'.

7

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

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



8

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

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



9

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

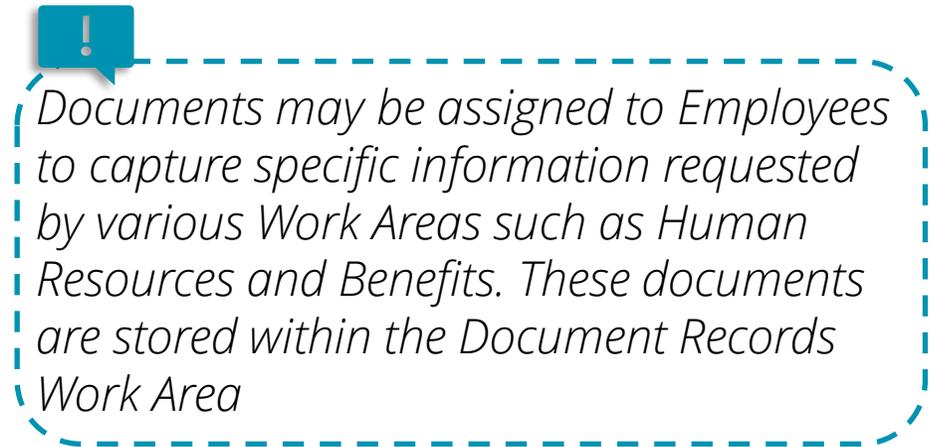
Section 5: View an Employee's Document Records Details

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

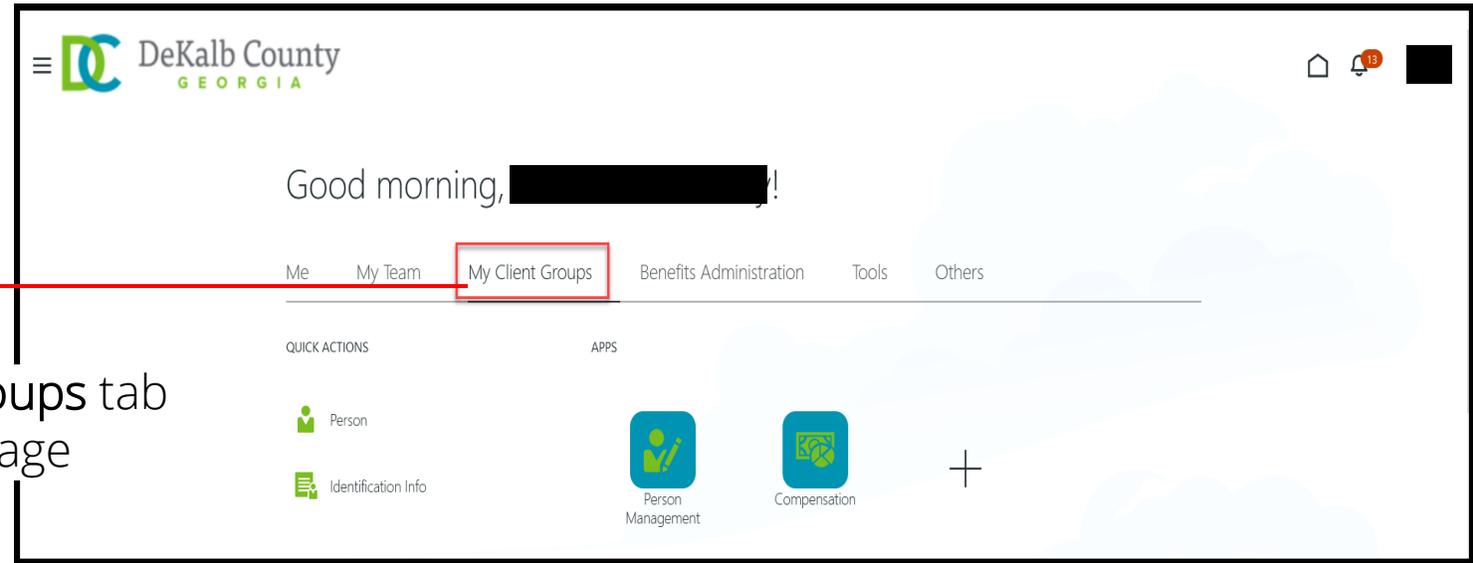


Documents may be assigned to Employees to capture specific information requested by various Work Areas such as Human Resources and Benefits. These documents are stored within the Document Records Work Area

Manage Employment: View an Employee's Document Records Details

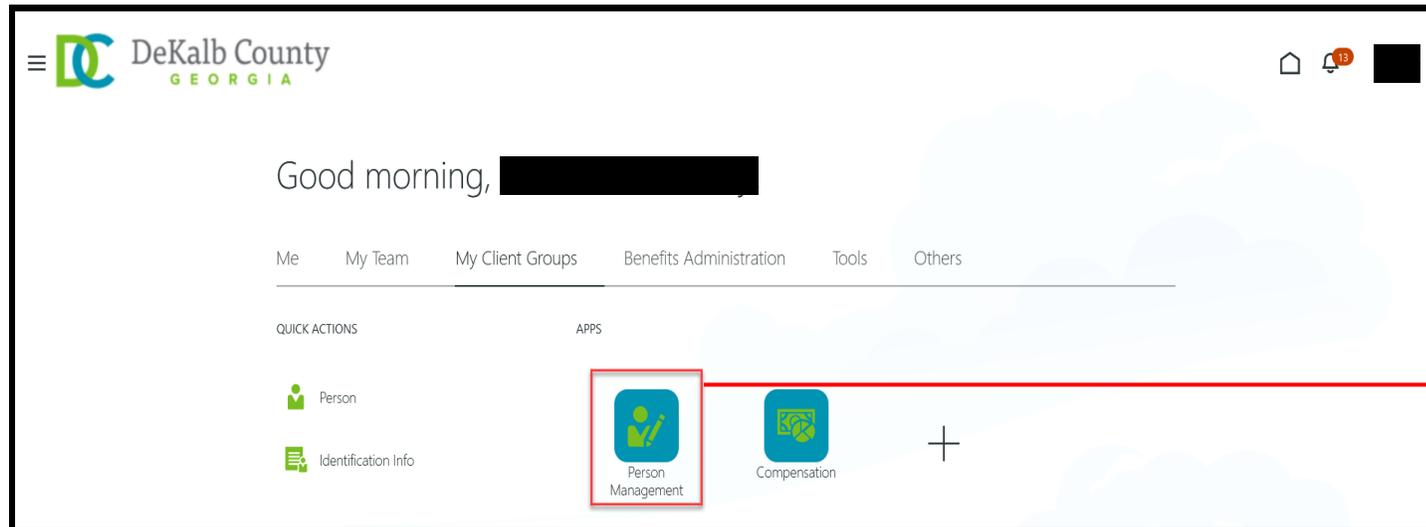
1

Select the **My Client Groups** tab from the CV360 homepage



2

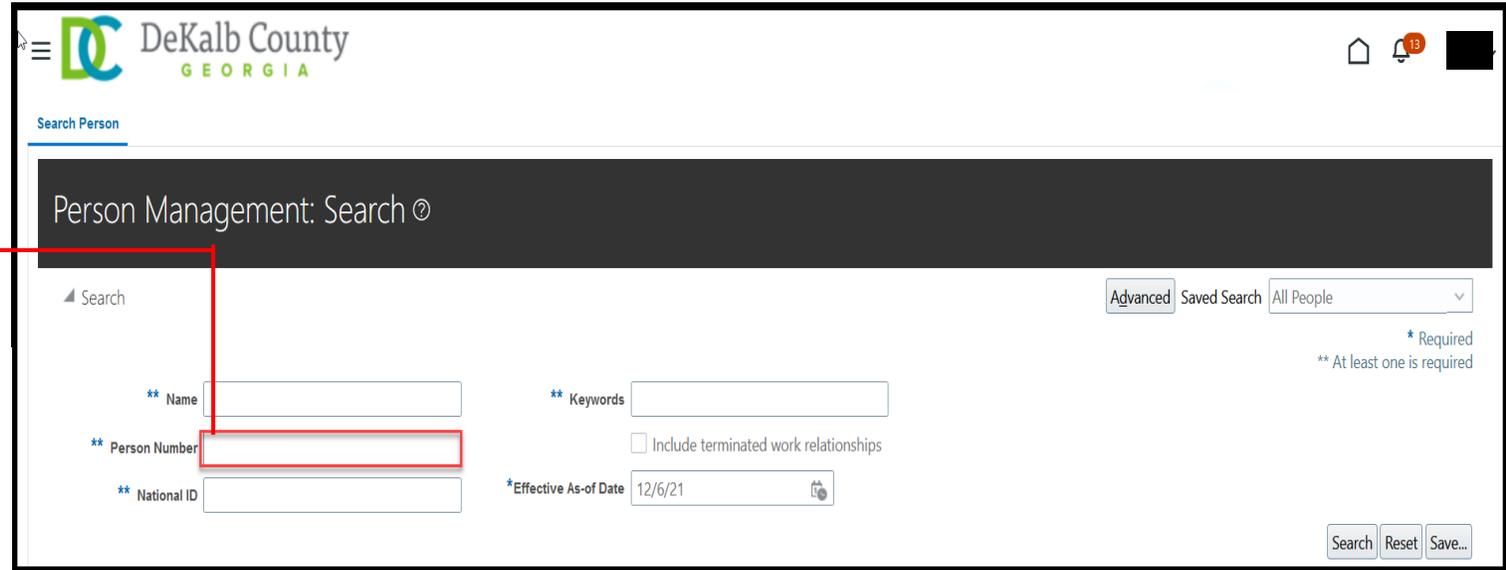
Select the **Person Management** tile within the Apps area



Manage Employment: View an Employee's Document Records Details

3

From the Person Management: Search page, key in the **Name** or **Employee Number** of the Employee



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name

** Keywords

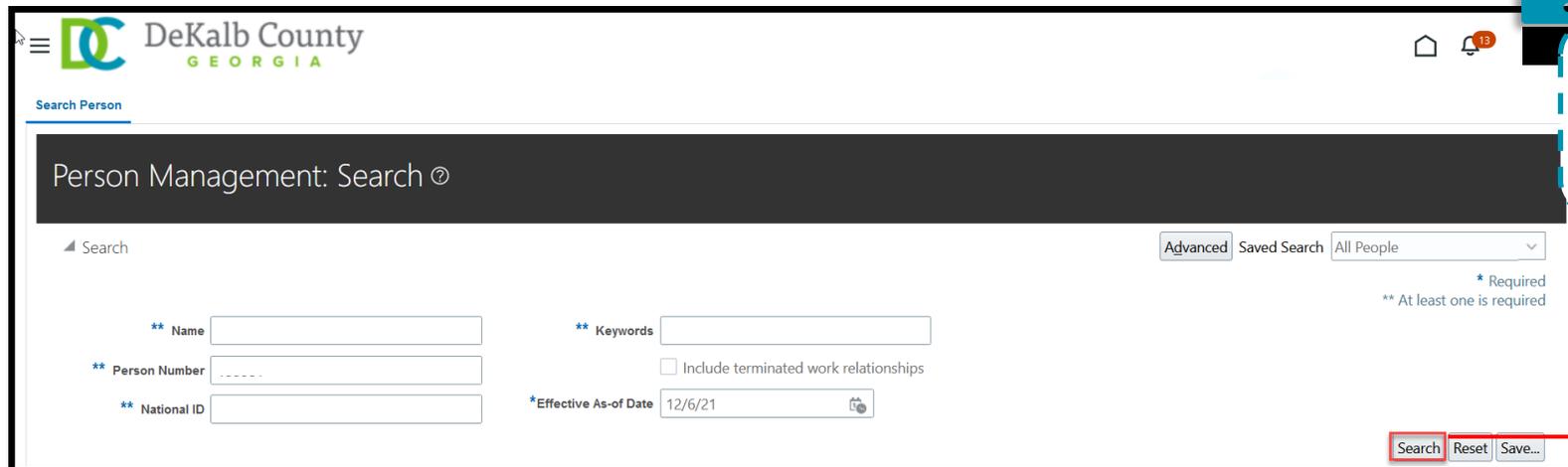
** Person Number

** National ID

*Effective As-of Date 12/6/21

Search Reset Save...

* Required
** At least one is required



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name

** Keywords

** Person Number

** National ID

*Effective As-of Date 12/6/21

Search Reset Save...

* Required
** At least one is required

Employees may be searched by Name, Person Number, or by Keywords

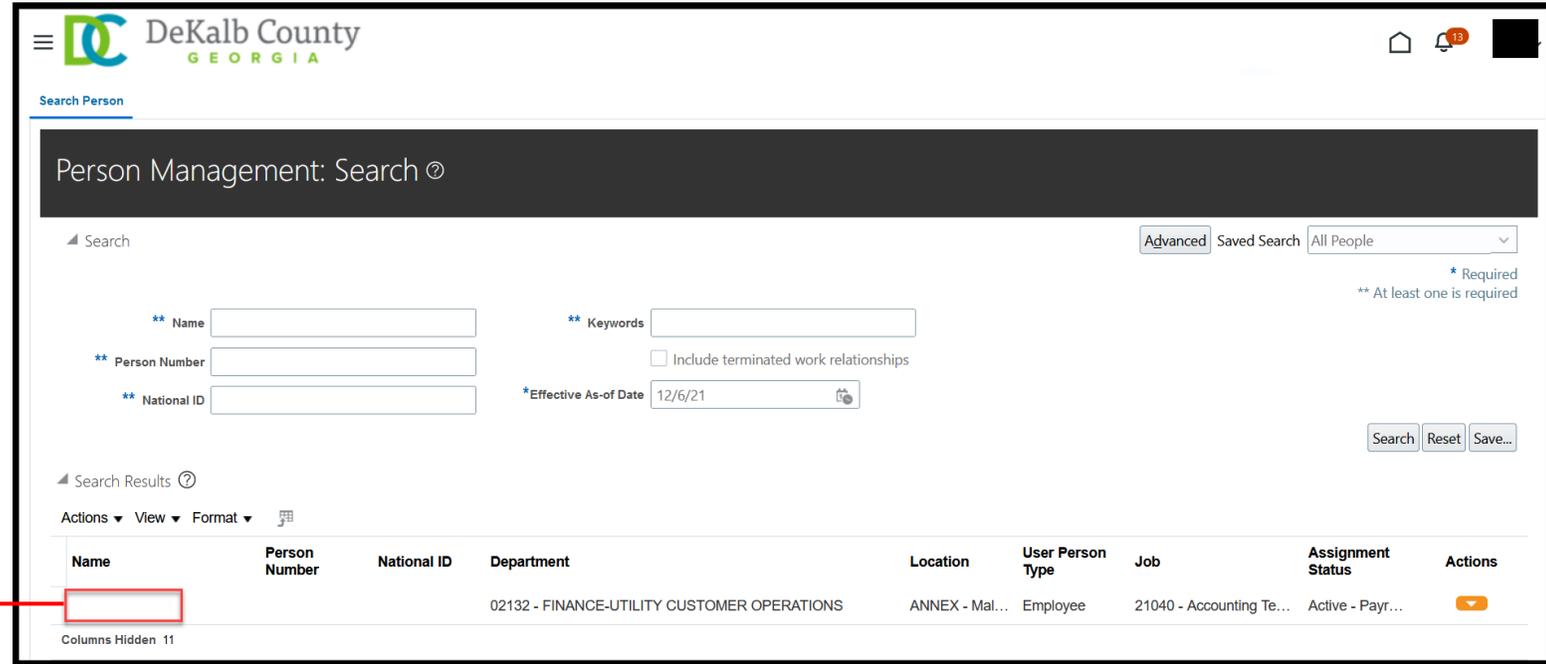
4

Select the Search button

Manage Employment: View an Employee's Document Records Details

5

From the Search Results section, select the Employee's Name link



DeKalb County GEORGIA

Person Management: Search

Search

Advanced Saved Search All People

** Name ** Keywords

** Person Number Include terminated work relationships

** National ID *Effective As-of Date 12/6/21

Search Reset Save...

Search Results

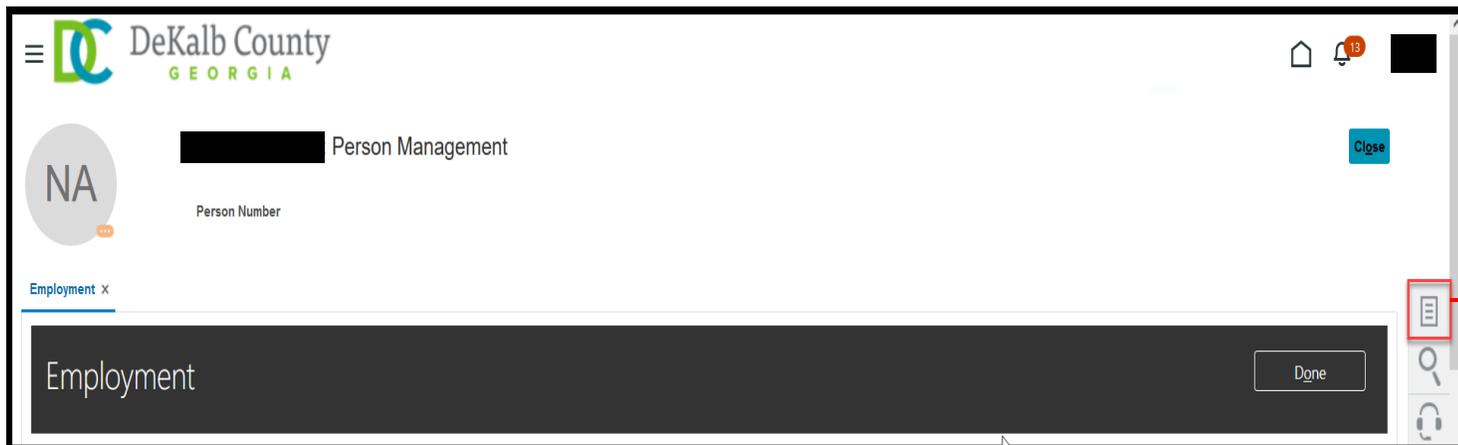
Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11

6

From the Employment page, select the Panel Drawer icon



DeKalb County GEORGIA

Person Management

Person Number

Employment x

Employment Done

Manage Employment: View an Employee's Document Records Details



The screenshot displays the DeKalb County Georgia HR system interface. At the top left is the DeKalb County logo. The main header shows 'Person Management' with a redacted person number. Below this, the 'Employment' tab is selected. The main content area shows 'Work Relationship' details: Legal Employer (DeKalb County GA), Worker Type (Employee), Hire Date (1/1/20), and Country (United States). At the bottom, the assignment is listed as '21040 - Accounting Technician, Senior'. On the right side, a panel drawer is open, showing a list of navigation options. The 'Document Records' link under the 'Personal and Employment' section is highlighted with a red box. A red line connects this link to a blue circle containing the number 7.

DeKalb County
GEORGIA

Person Management
Person Number

Employment x

Employment

Work Relationship ⓘ
Legal Employer DeKalb County GA
Worker Type Employee
Hire Date 1/1/20
Country United States

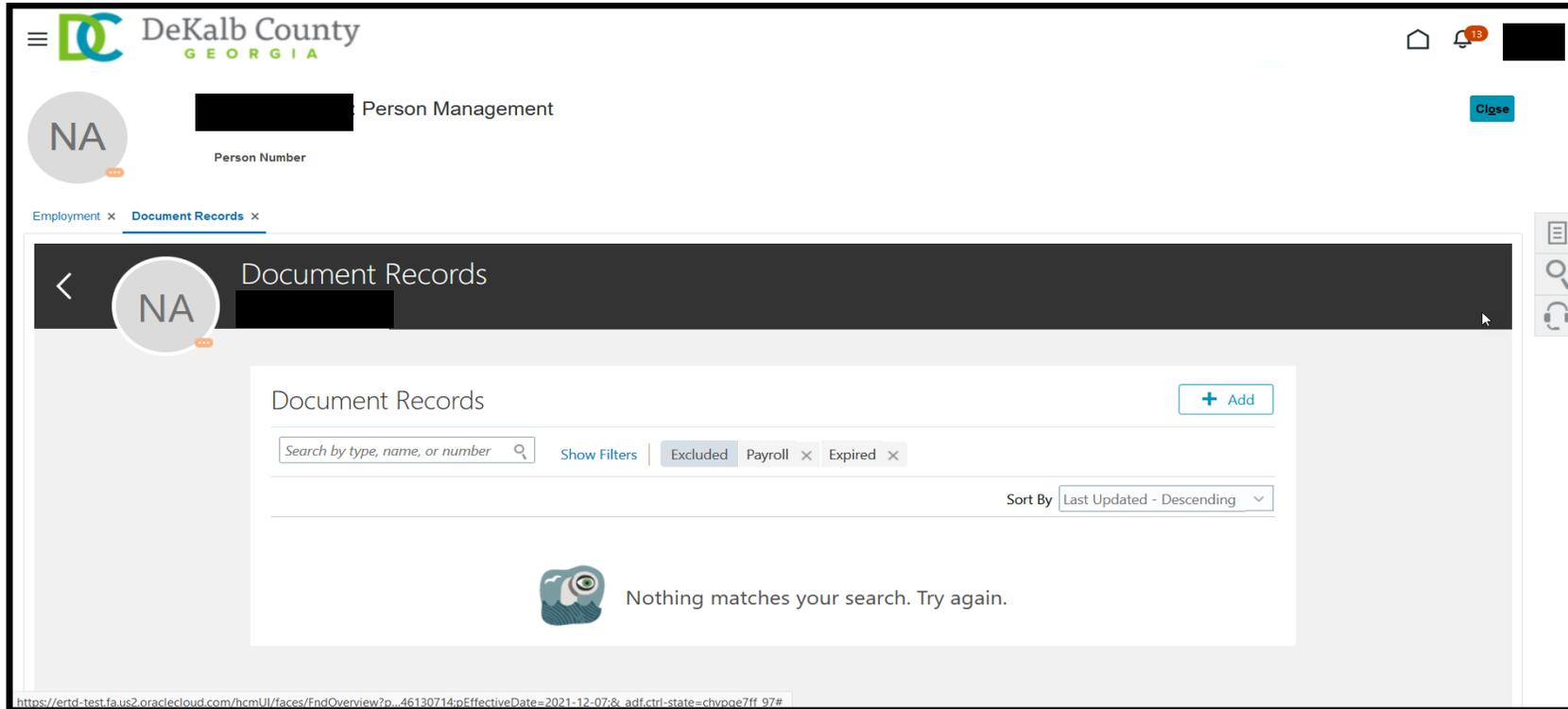
Assignment: 21040 - Accounting Technician, Senior ⓘ

- Compare
- Absences**
 - Absence Records
- Compensation**
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement
- Personal and Employment**
 - Person
 - Employment
 - Seniority Dates
 - Work Relationship
 - Talent Profile
 - Document Records
 - Document Delivery Preferences
 - Person Identifiers for External Applications

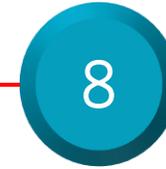
7

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

Manage Employment: View an Employee's Document Records Details

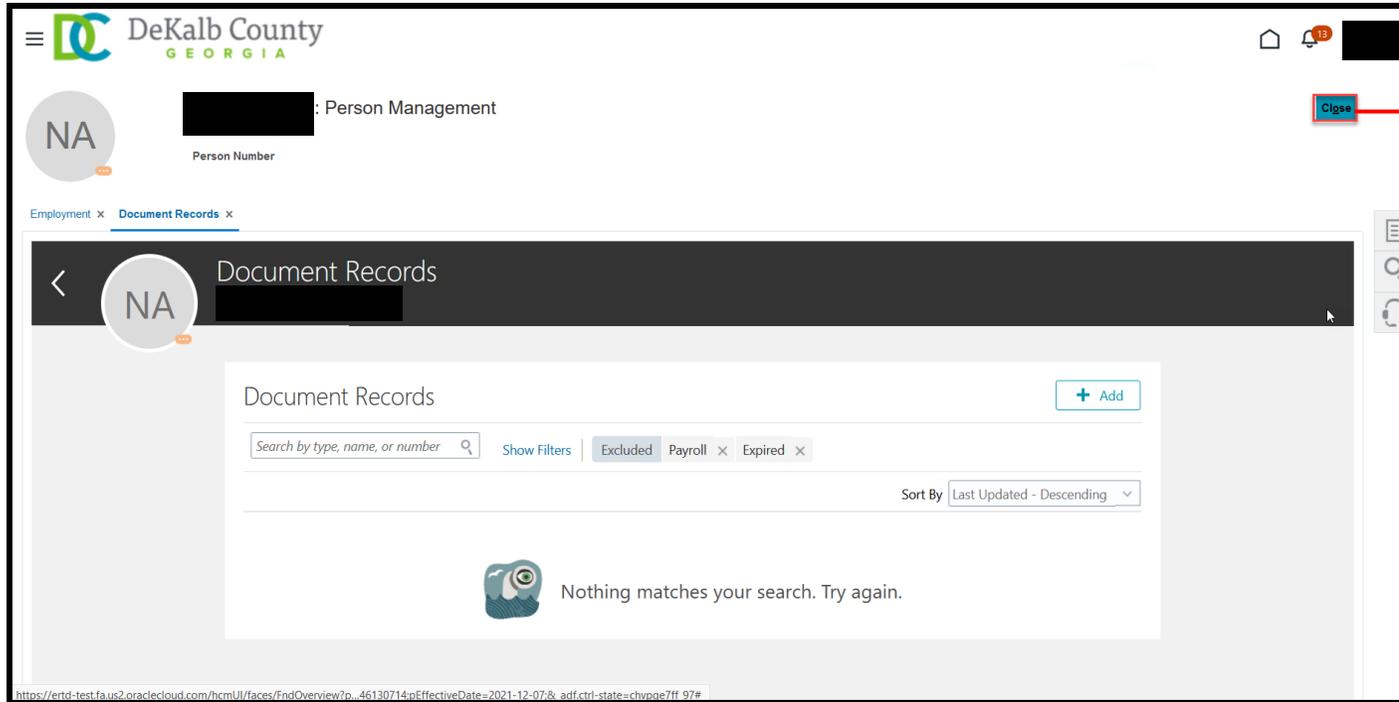


The screenshot shows the DeKalb County Georgia HR system interface. At the top, there is a navigation bar with the DeKalb County logo and the text 'DeKalb County GEORGIA'. Below this, there is a user profile section with a circular icon containing 'NA' and the text 'Person Management'. A 'Close' button is visible in the top right corner. The main content area is titled 'Document Records' and features a search bar with the placeholder text 'Search by type, name, or number'. Below the search bar, there are filter buttons for 'Excluded', 'Payroll', and 'Expired'. A 'Sort By' dropdown menu is set to 'Last Updated - Descending'. A message icon is visible in the bottom left corner of the main content area. The message text reads: 'Nothing matches your search. Try again.'



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

Manage Employment: View an Employee's Document Records Details



9

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



CloudVergent 360

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

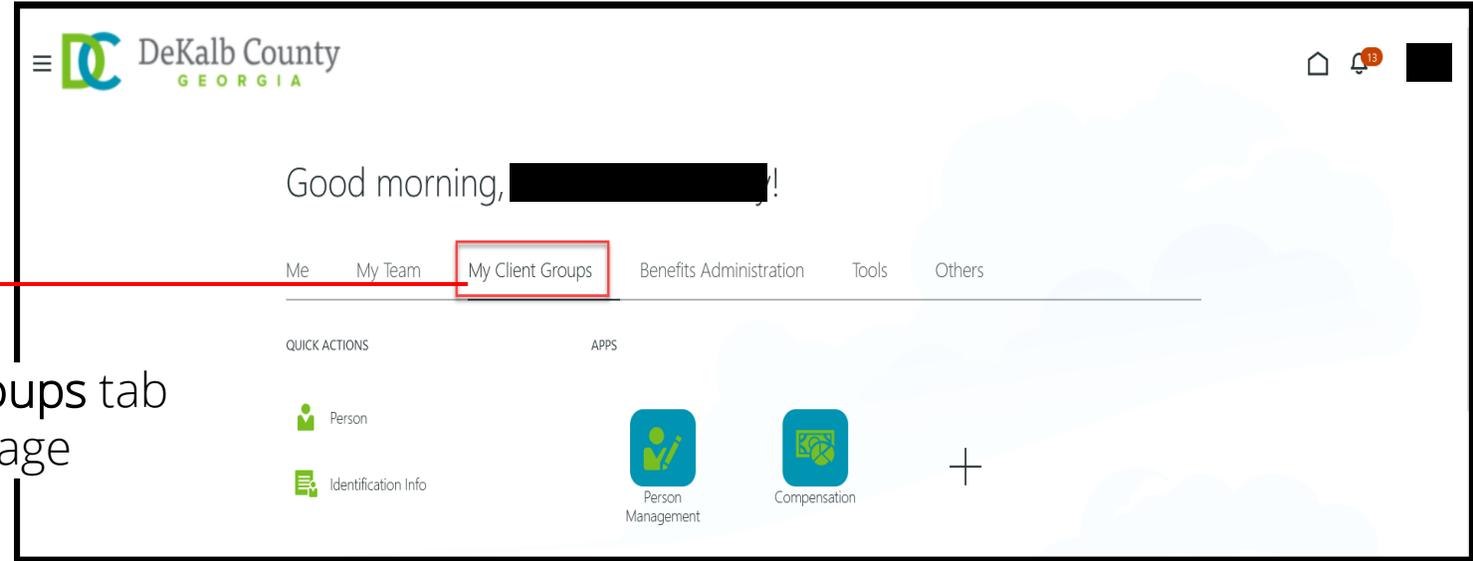


Documents may be assigned to Employees to capture specific information requested by various work areas such as Human Resources and Benefits. These documents are stored within the Document Records Work Area

Manage Employment: Add a Document of Record

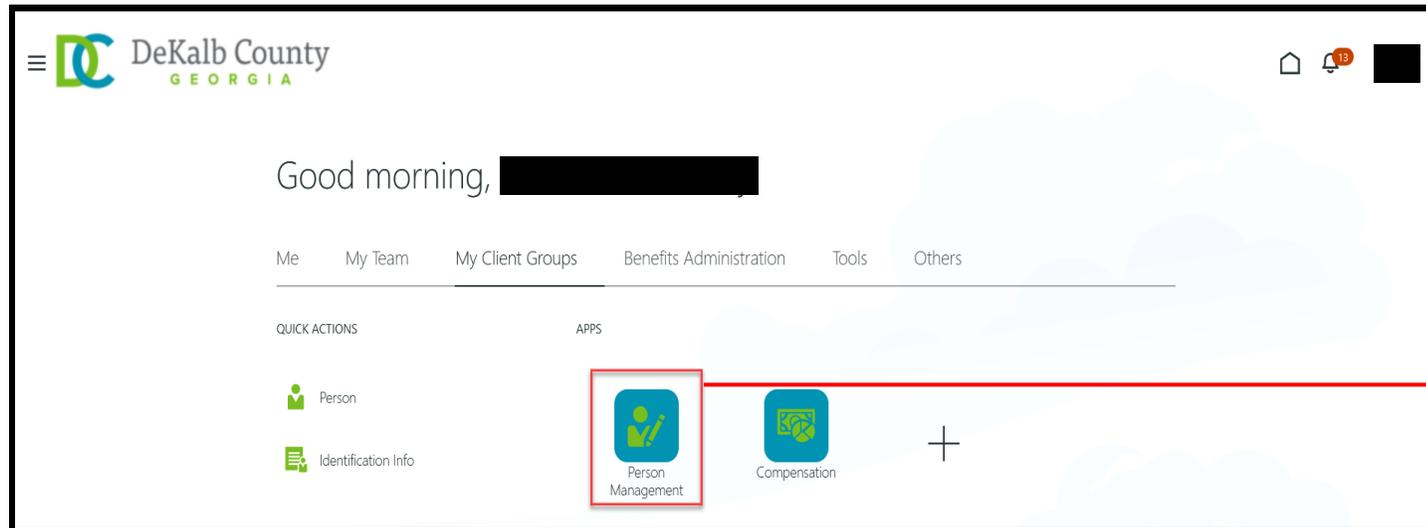
1

Select the **My Client Groups** tab from the CV360 homepage



2

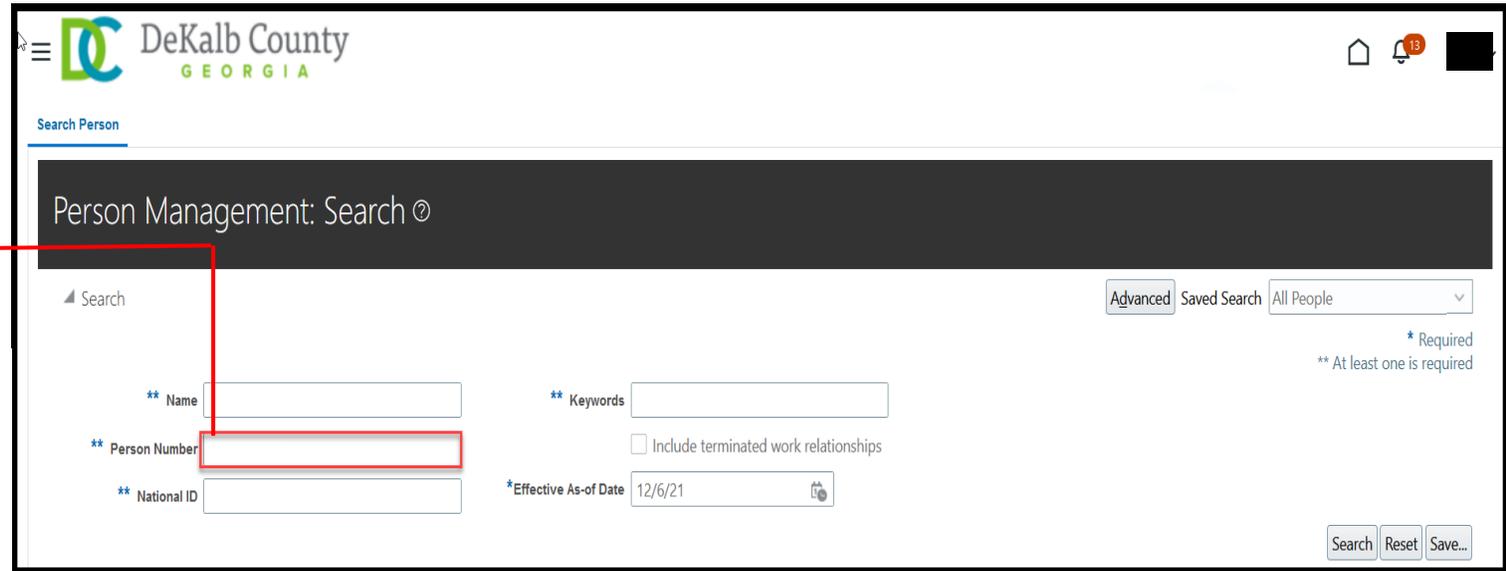
Select the **Person Management** tile within the Apps area



Manage Employment: Add a Document of Record

3

From the Person Management: Search page, key in the **Name** or **Employee Number** of the Employee



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name

** Keywords

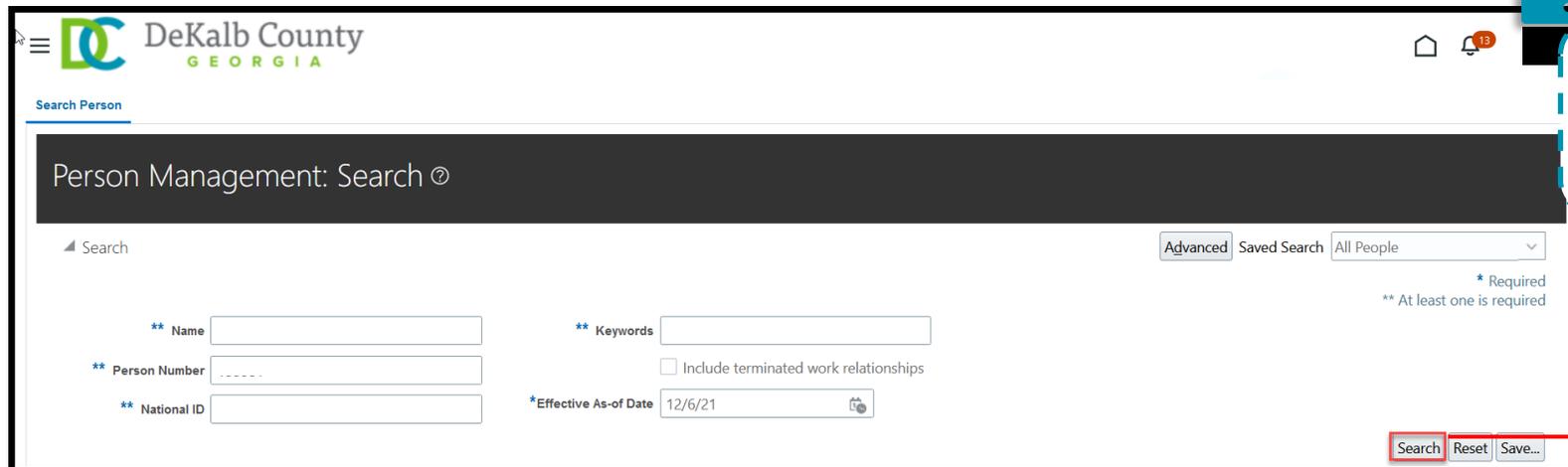
** Person Number

** National ID

*Effective As-of Date 12/6/21

Search Reset Save...

* Required
** At least one is required



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name

** Keywords

** Person Number

** National ID

*Effective As-of Date 12/6/21

Search Reset Save...

* Required
** At least one is required

Employees may be searched by Name, Person Number, or by Keywords

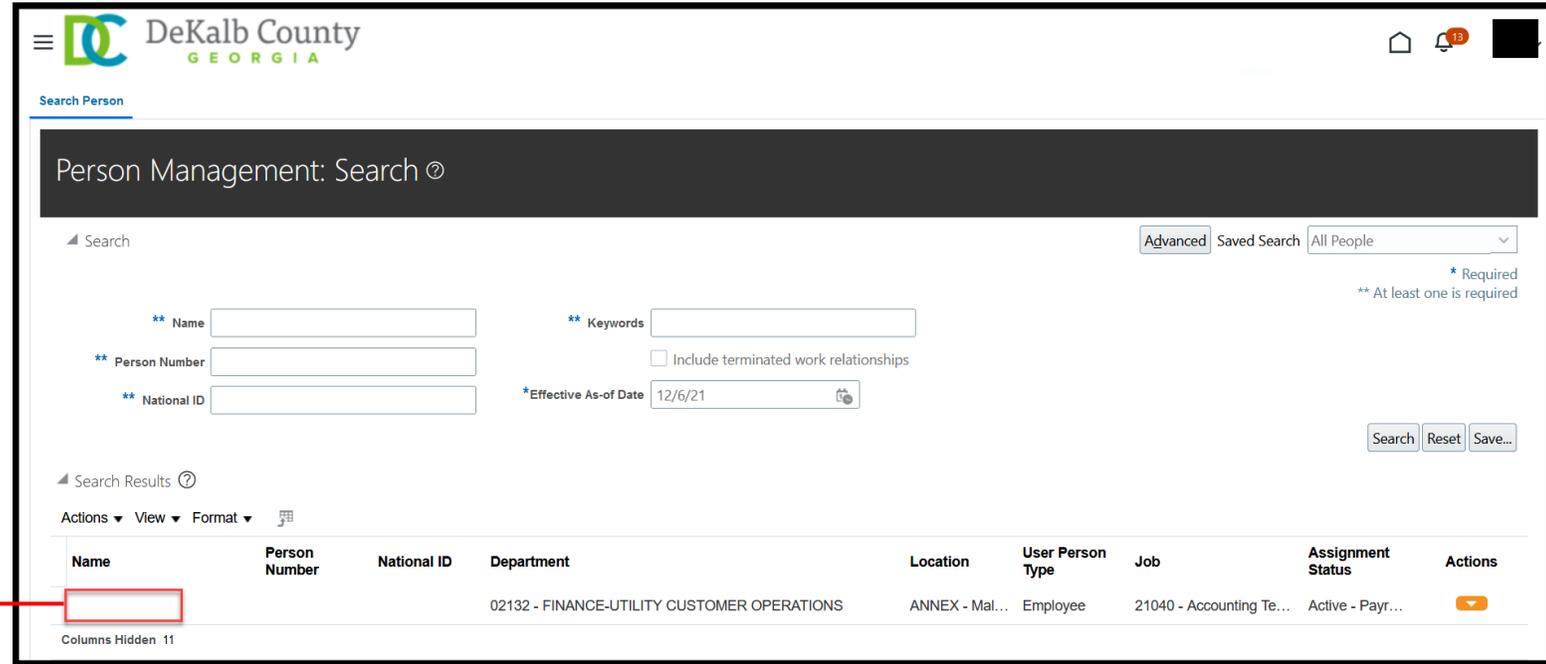
4

Select the Search button

Manage Employment: Add a Document of Record

5

From the Search Results section, select the Employee's Name link



DeKalb County GEORGIA

Search Person

Person Management: Search

Search

Advanced Saved Search All People

** Name ** Keywords

** Person Number Include terminated work relationships

** National ID *Effective As-of Date 12/6/21

Search Reset Save...

Search Results

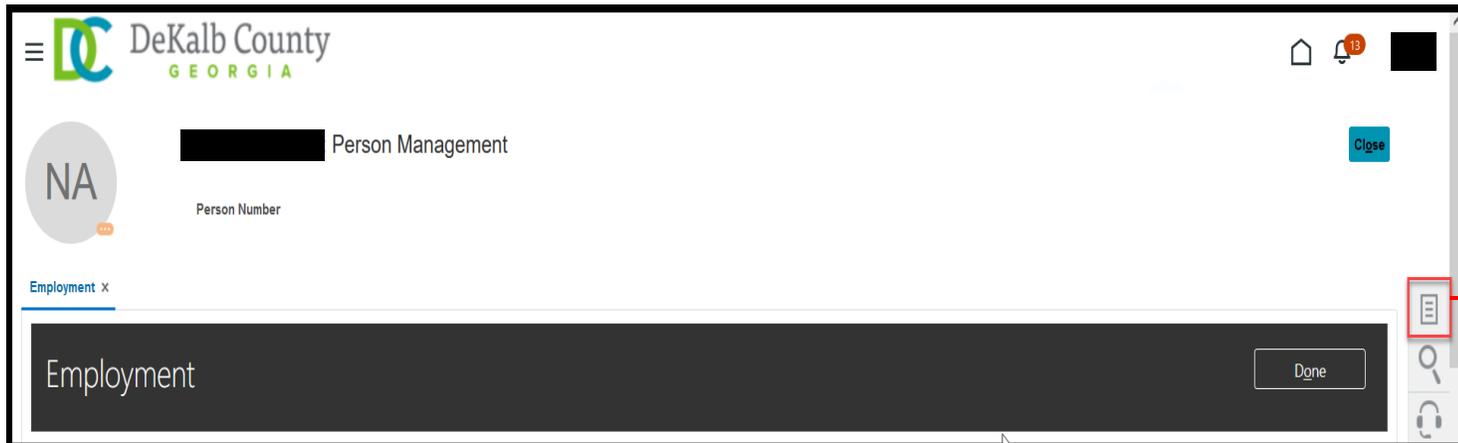
Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11

6

From the Employment page, select the Panel Drawer icon



DeKalb County GEORGIA

Person Management

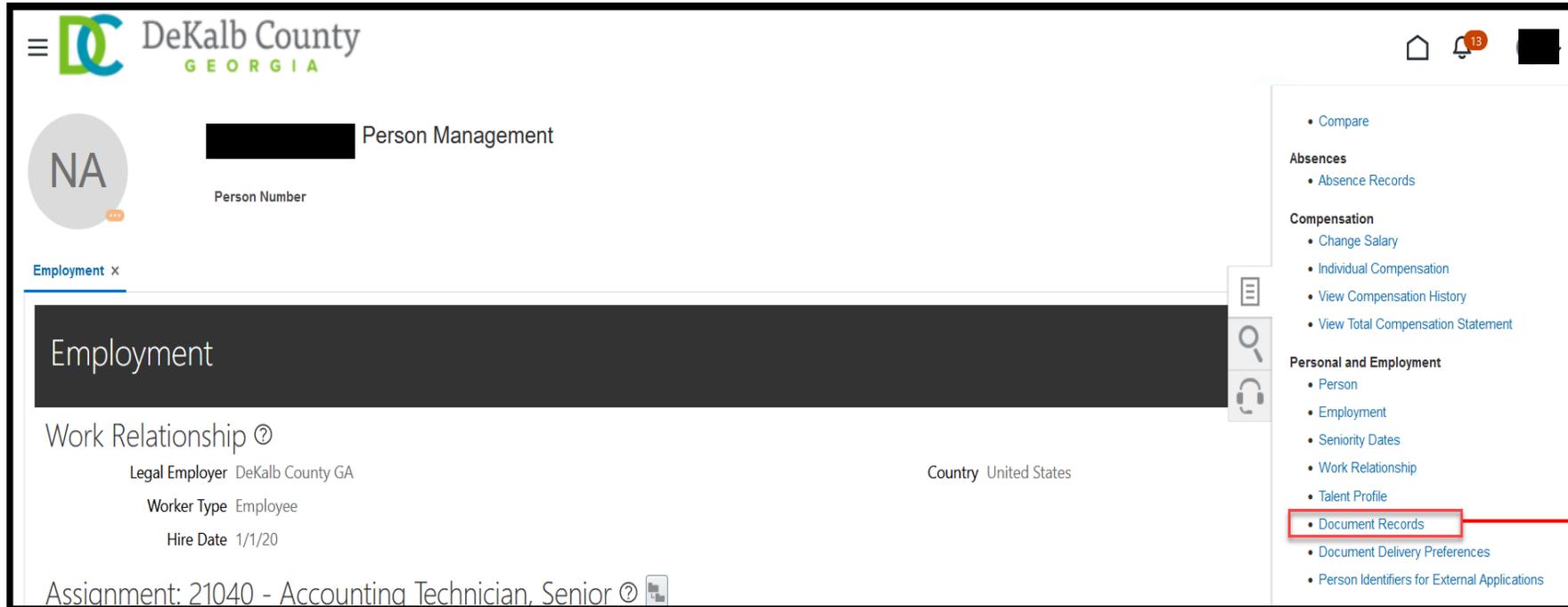
Person Number

Employment x

Employment

Done

Manage Employment: Add a Document of Record



DeKalb County
GEORGIA

Person Management

Person Number

Employment x

Employment

Work Relationship ⓘ

Legal Employer DeKalb County GA

Country United States

Worker Type Employee

Hire Date 1/1/20

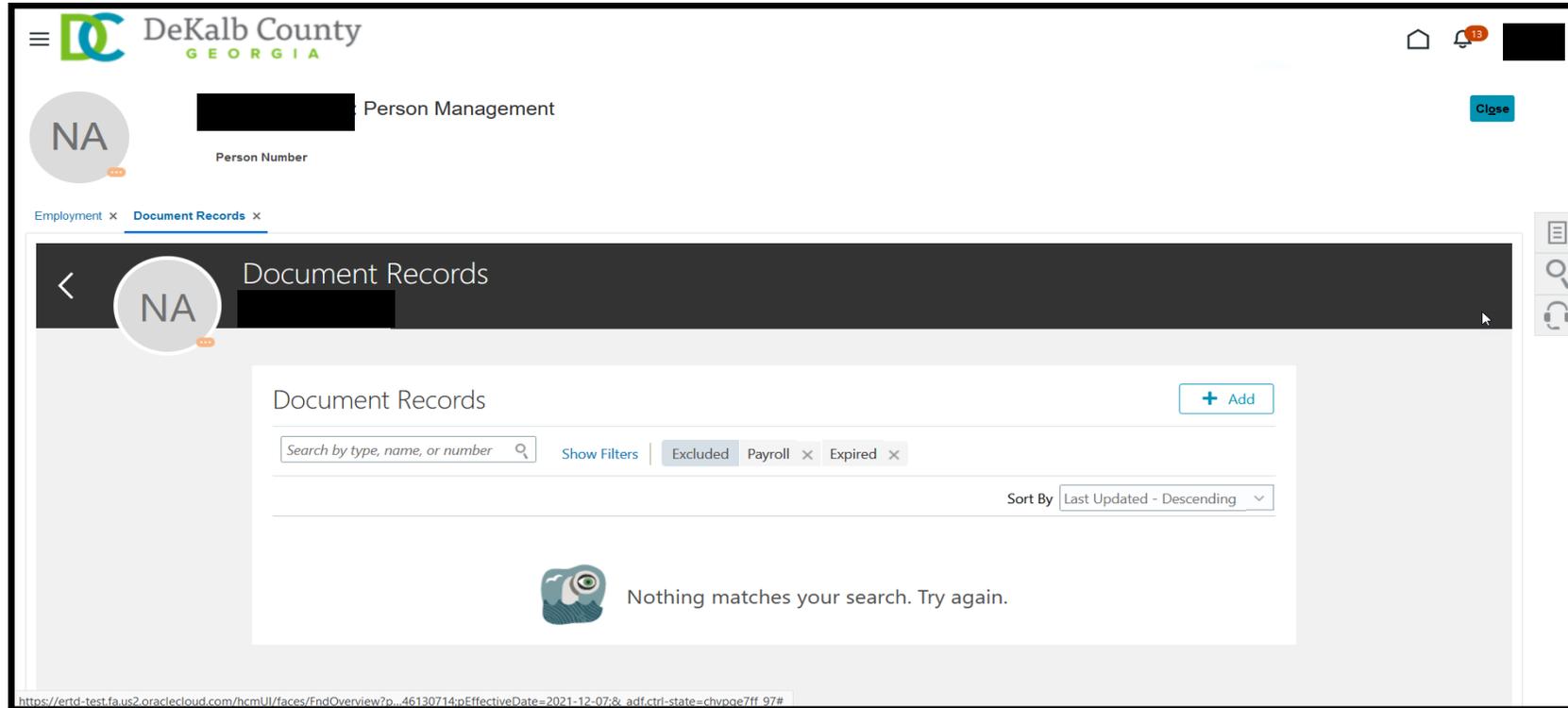
Assignment: 21040 - Accounting Technician, Senior ⓘ

- Compare
- Absences**
 - Absence Records
- Compensation**
 - Change Salary
 - Individual Compensation
 - View Compensation History
 - View Total Compensation Statement
- Personal and Employment**
 - Person
 - Employment
 - Seniority Dates
 - Work Relationship
 - Talent Profile
 - **Document Records**
 - Document Delivery Preferences
 - Person Identifiers for External Applications

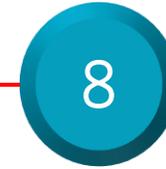
7

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

Manage Employment: Add a Document of Record

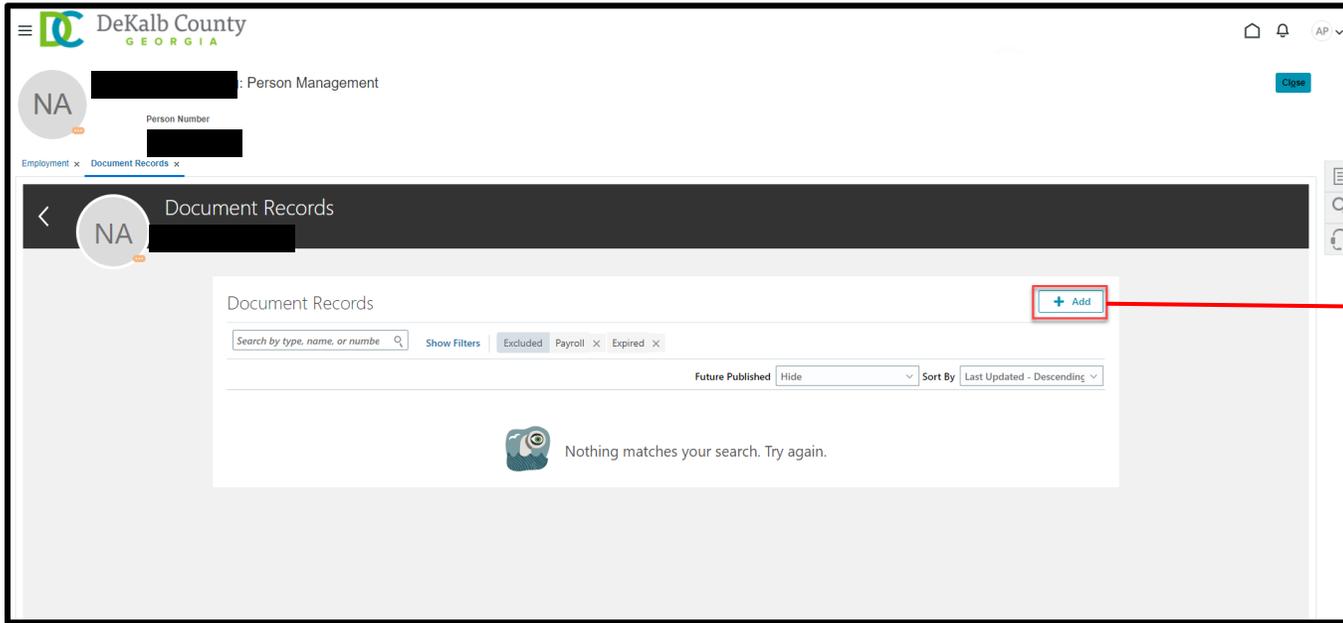


The screenshot shows the DeKalb County Georgia HR system interface. At the top, there is a navigation bar with the DeKalb County logo and the text 'DeKalb County GEORGIA'. Below this, there is a user profile section with a circular icon containing 'NA' and the text 'Person Management'. A 'Close' button is visible in the top right corner. The main content area is titled 'Document Records' and features a search bar with the placeholder text 'Search by type, name, or number'. There are filter buttons for 'Excluded', 'Payroll', and 'Expired'. A 'Sort By' dropdown menu is set to 'Last Updated - Descending'. A '+ Add' button is located in the top right of the search area. Below the search bar, a message with a magnifying glass icon states 'Nothing matches your search. Try again.' The URL at the bottom of the page is 'https://ertd-test-fa.us2.oraclecloud.com/hcmUI/faces/FndOverview?p_46130714pEffectiveDate=2021-12-07&_adf.ctrl-state=chvncg7ff_97#'



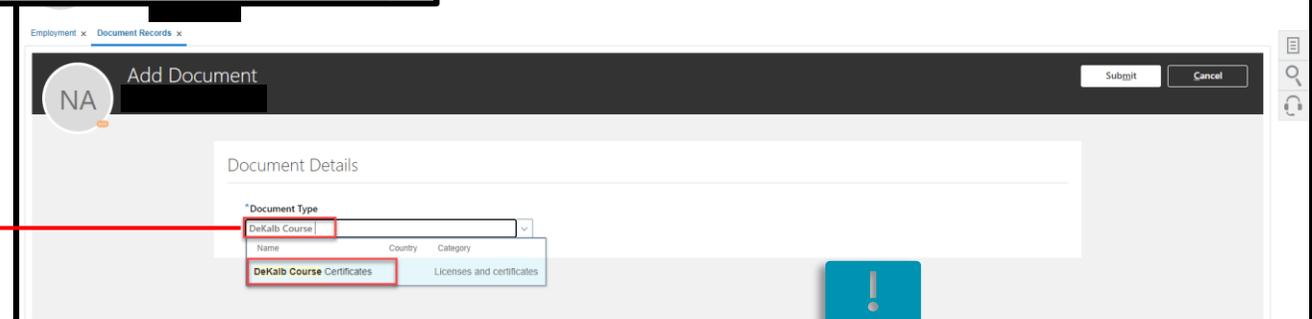
From the **Document Records** tab, the Coordinator can review the Documents assigned to the Employee. If no Documents were assigned, a message, *There's nothing here so far,* will appear on the page

Manage Employment: Add a Document of Record



9 To add a new Document, select the +Add button

10



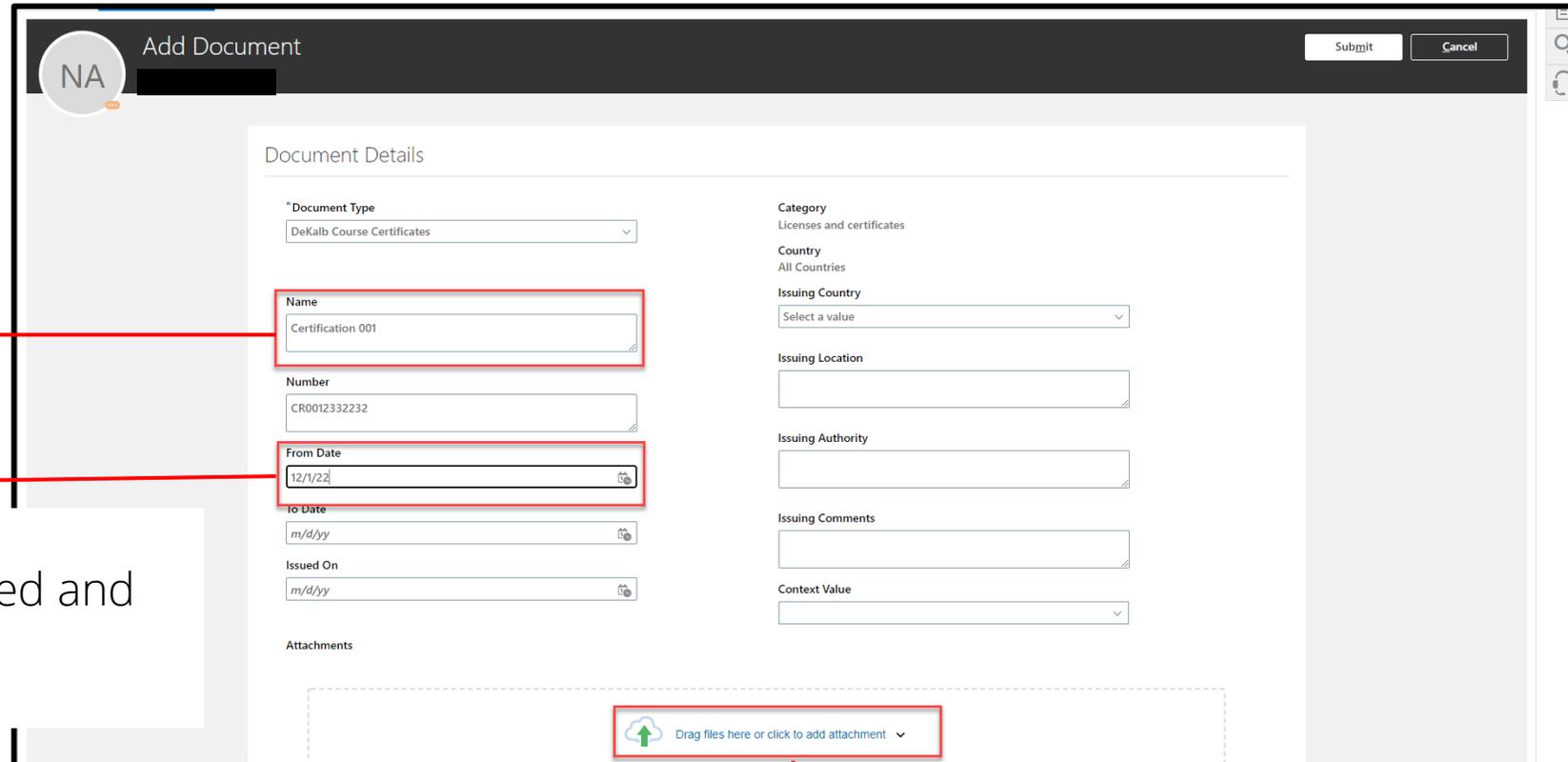
Key in the Document Type that you want to upload against an Employee Record, for example, DeKalb Course Certificate, and select the correct Type from the Search suggestion



Please refer to Appendix 1 for the list of Document Types available for selection

Manage Employment: Add a Document of Record

11

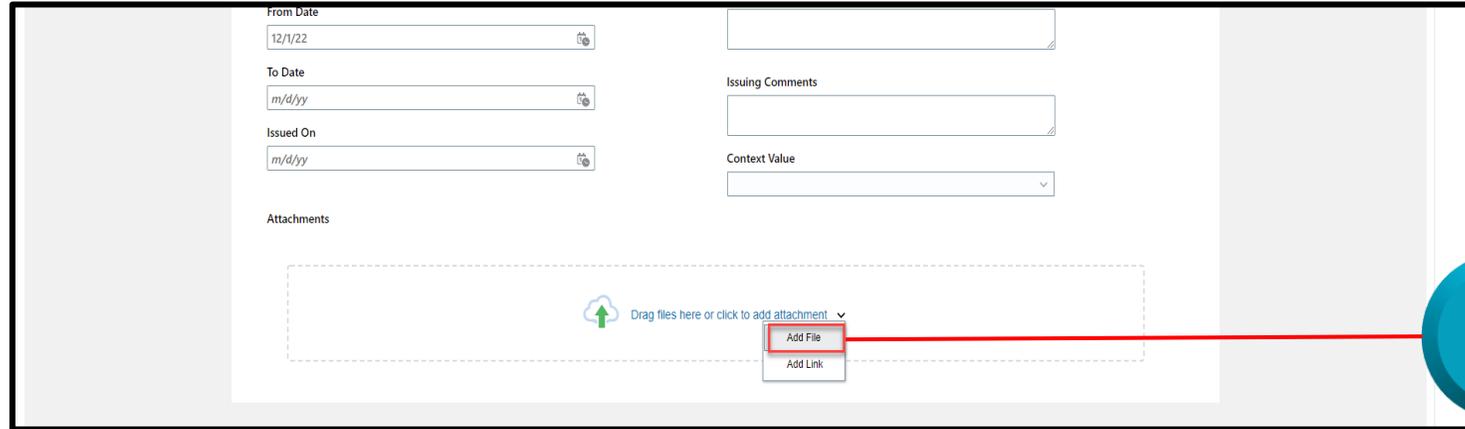


12

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

Key in the **Name** for the Document to be uploaded and specify the **Start Date**, if applicable

Manage Employment: Add a Document of Record



From Date
12/1/22

To Date
m/d/yy

Issued On
m/d/yy

Issuing Comments

Context Value

Attachments

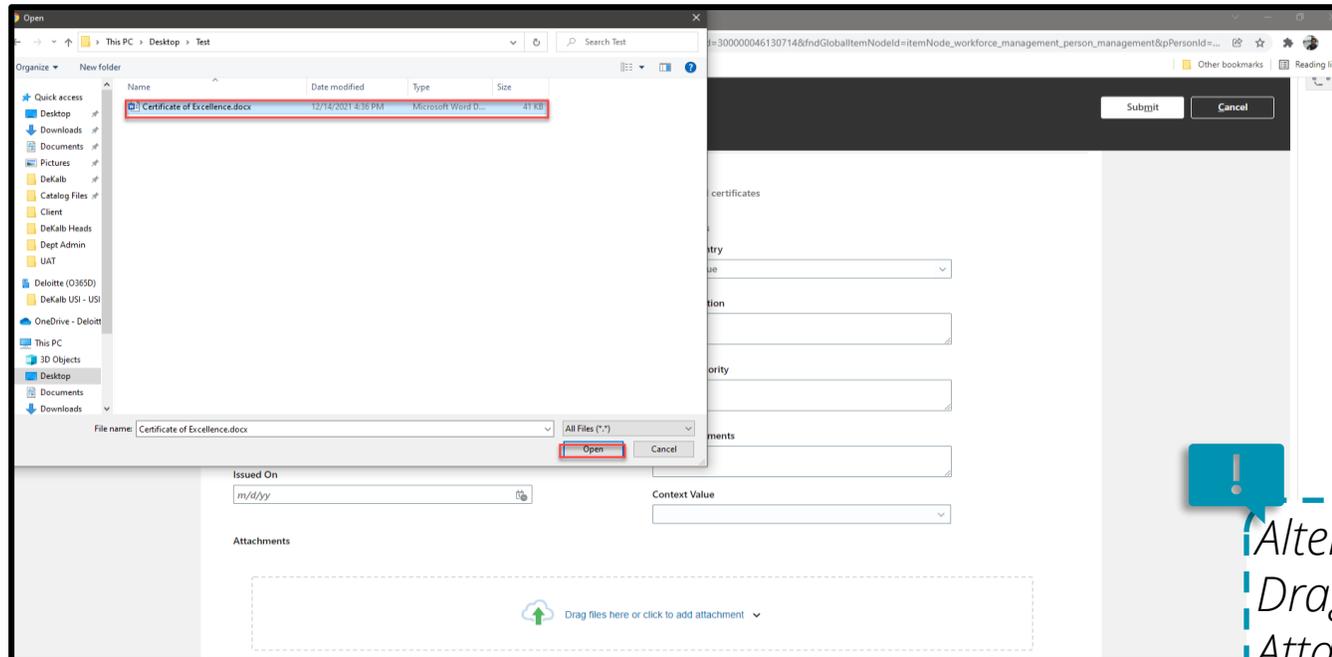
Drag files here or click to add attachment

Add File

Add Link

13

Select the **Add File** button to select the file



Open

This PC > Desktop > Test

Name	Date modified	Type	Size
Certificate of Excellence.docx	12/14/2021 4:38 PM	Microsoft Word D...	41 KB

File name: Certificate of Excellence.docx

All Files (*.*)

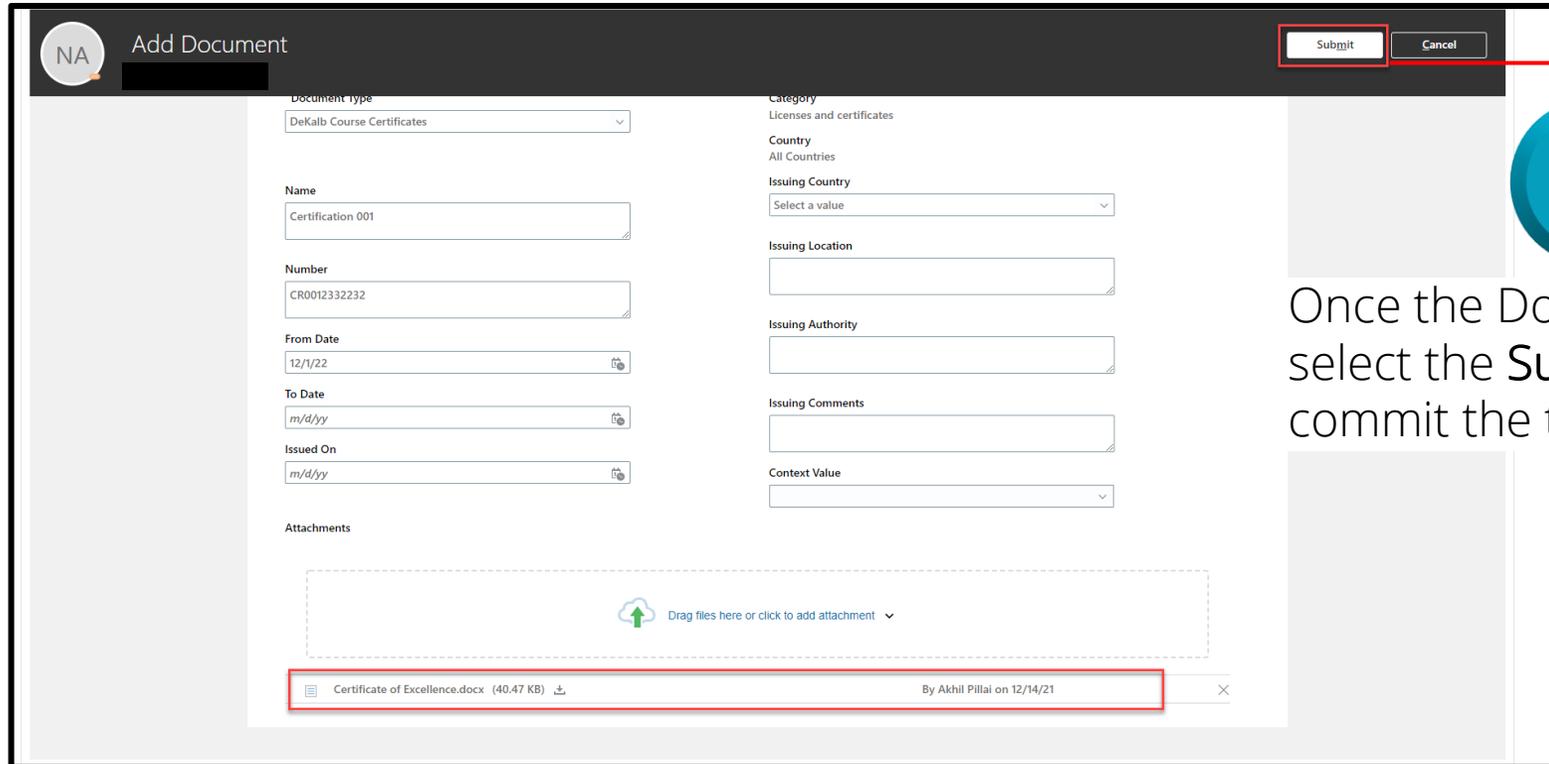
Open Cancel

14

Select the file to be uploaded and select the **Open** button

Alternatively, one can also Drag and Drop a file to the Attachments area

Manage Employment: Add a Document of Record



NA Add Document

Document type: DeKalb Course Certificates

Name: Certification 001

Number: CR0012332232

From Date: 12/1/22

To Date: m/d/yy

Issued On: m/d/yy

Category: Licenses and certificates

Country: All Countries

Issuing Country: Select a value

Issuing Location:

Issuing Authority:

Issuing Comments:

Context Value:

Attachments:

Drag files here or click to add attachment

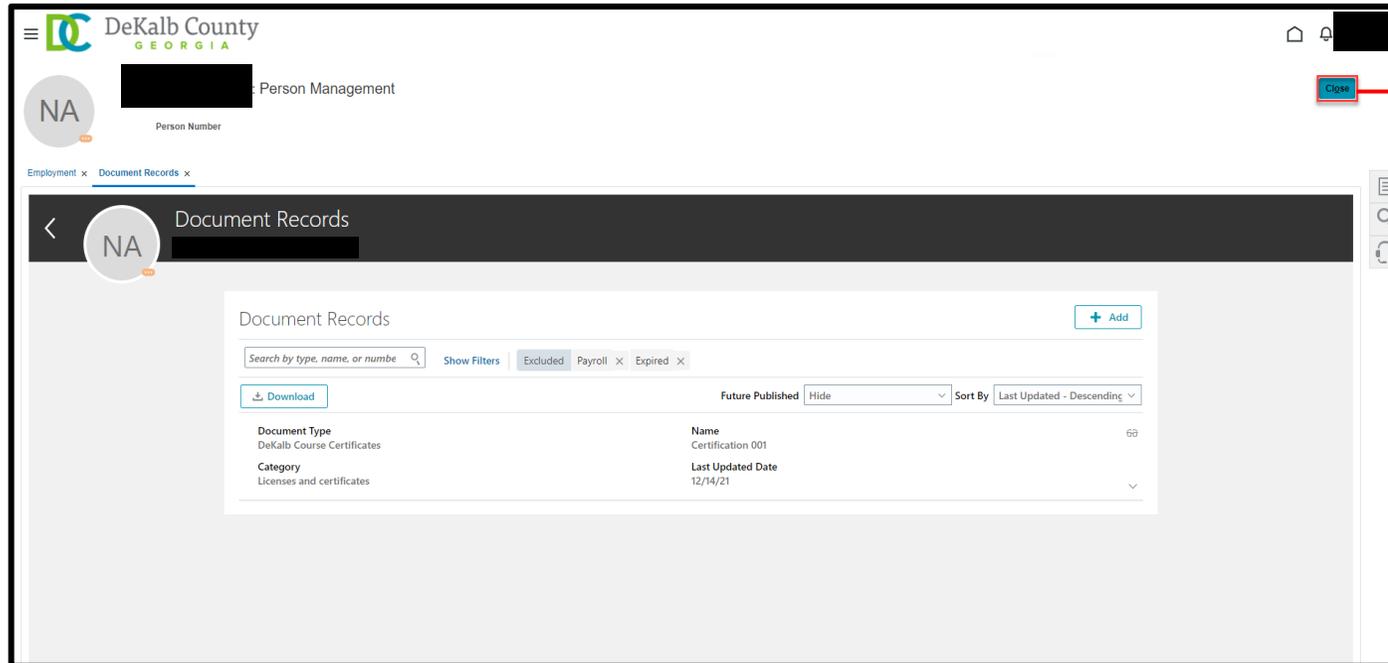
Certificate of Excellence.docx (40.47 KB) By Akhil Pillai on 12/14/21

Submit Cancel

15

Once the Document is uploaded, select the **Submit** button to commit the transaction

Manage Employment: Add a Document of Record



DeKalb County
GEORGIA

Person Management

Person Number

Document Records

Document Records

+ Add

Search by type, name, or number

Show Filters Excluded Payroll Expired

Download

Future Published Hide

Sort By Last Updated - Descending

Document Type	Name	
DeKalb Course Certificates	Certification 001	66
Category	Last Updated Date	
Licenses and certificates	12/14/21	

16

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**



CloudVergent 360

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



CloudVergent 360

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

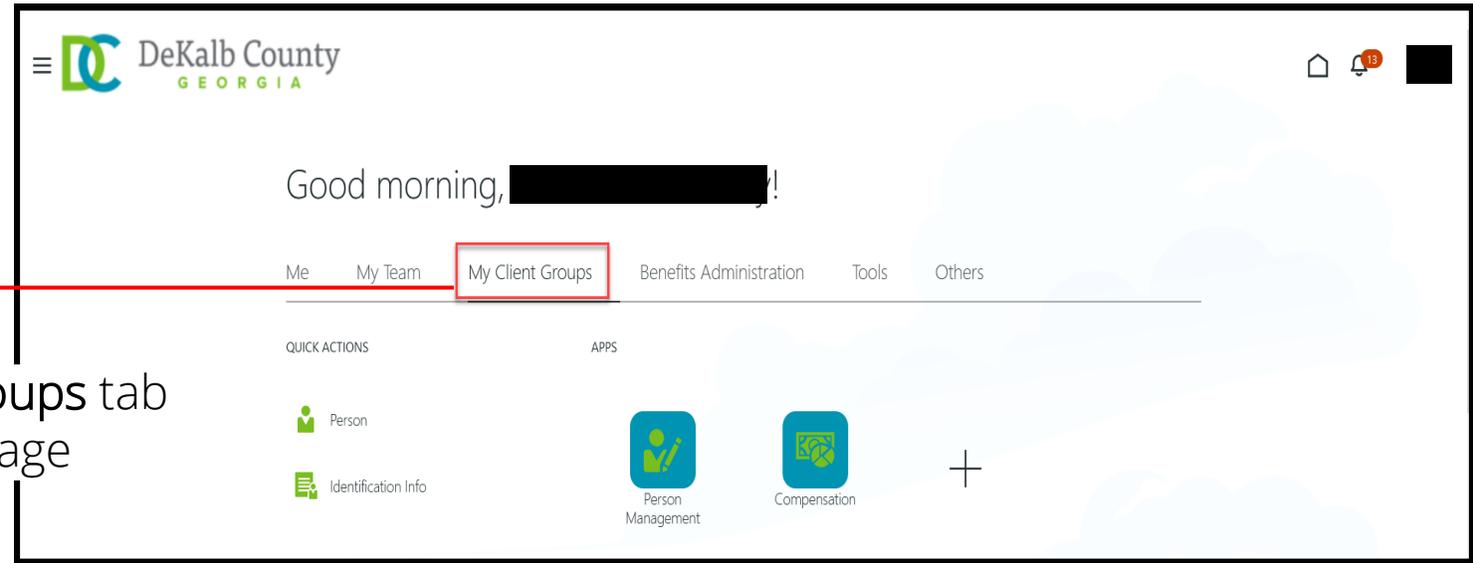


Person Identifiers for External Application allows an organization to store additional IDs in the system which are typically used for integrations that pass this information to an external Third-Party Vendor or to an internal application requiring this information

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

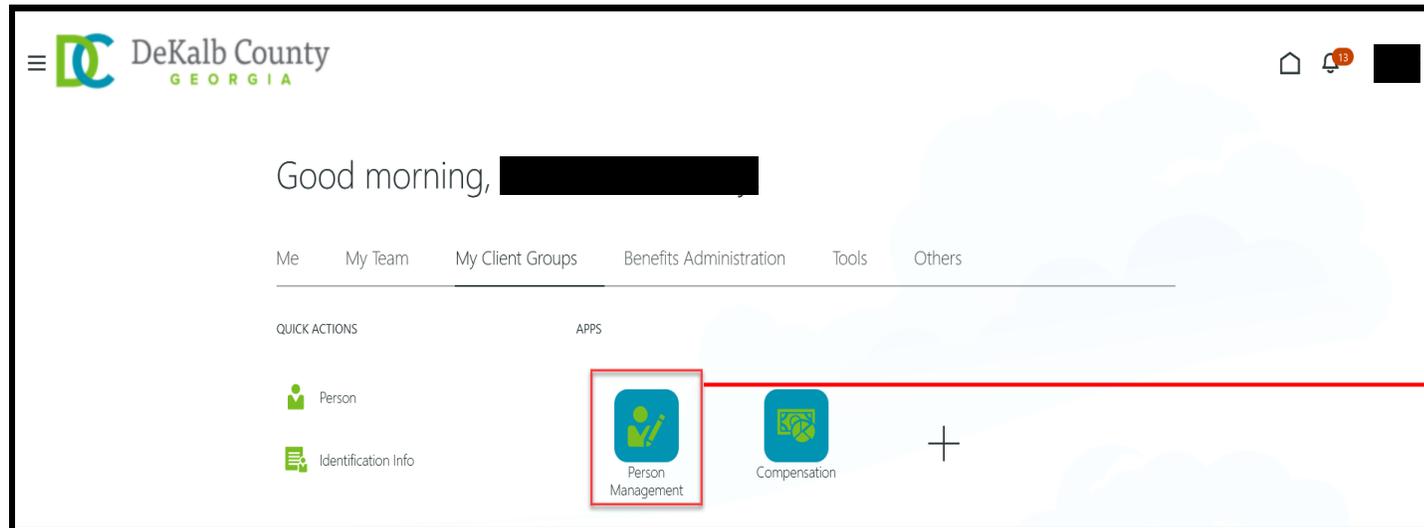
1

Select the My Client Groups tab from the CV360 homepage



2

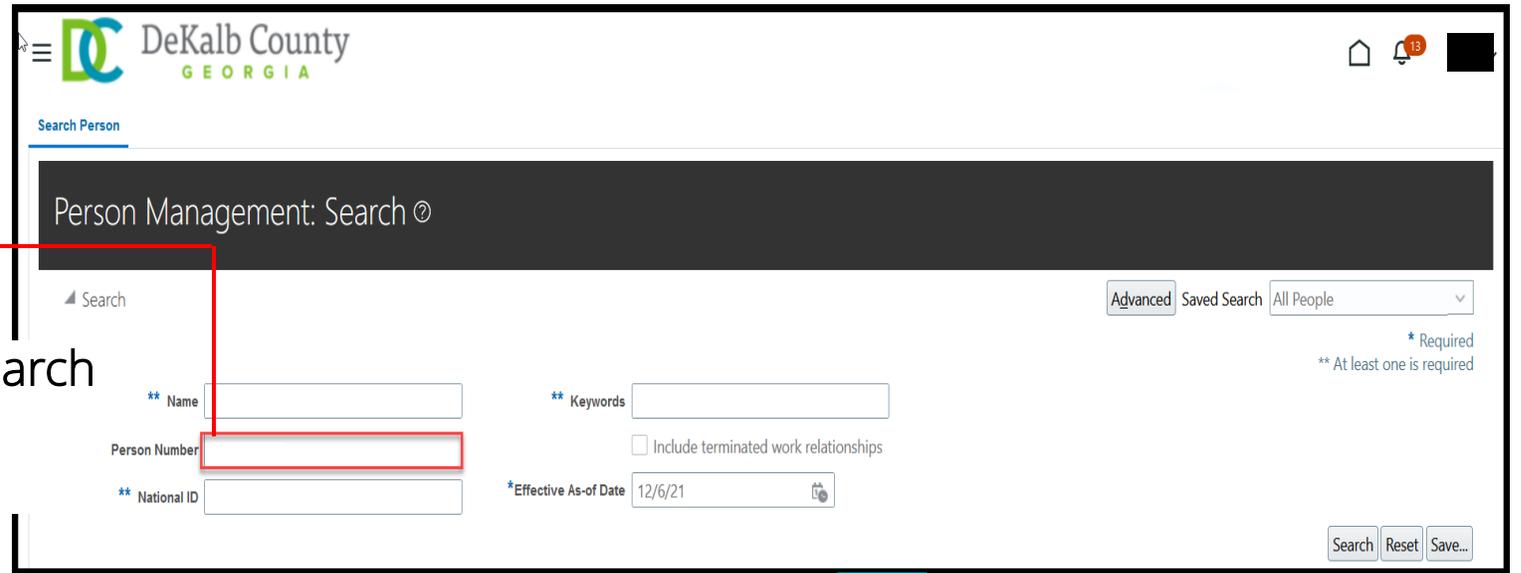
Select the Person Management tile within the Apps area



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

3

From the Person Management: Search page, key the **Name** or **Employee Number** of the Employee



DeKalb County GEORGIA

Search Person

Person Management: Search ©

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

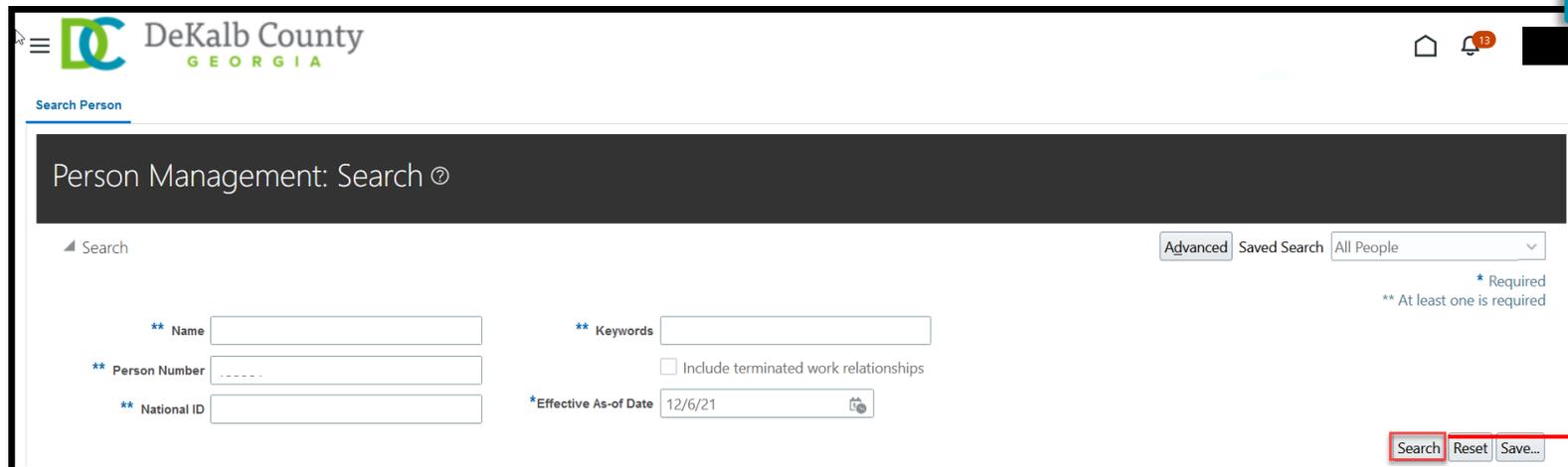
** Keywords

Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...



DeKalb County GEORGIA

Search Person

Person Management: Search ©

Search

Advanced Saved Search All People

* Required
** At least one is required

** Name

** Keywords

** Person Number

Include terminated work relationships

*Effective As-of Date 12/6/21

Search Reset Save...

Employees may be searched by Name, Person Number, or by Keywords

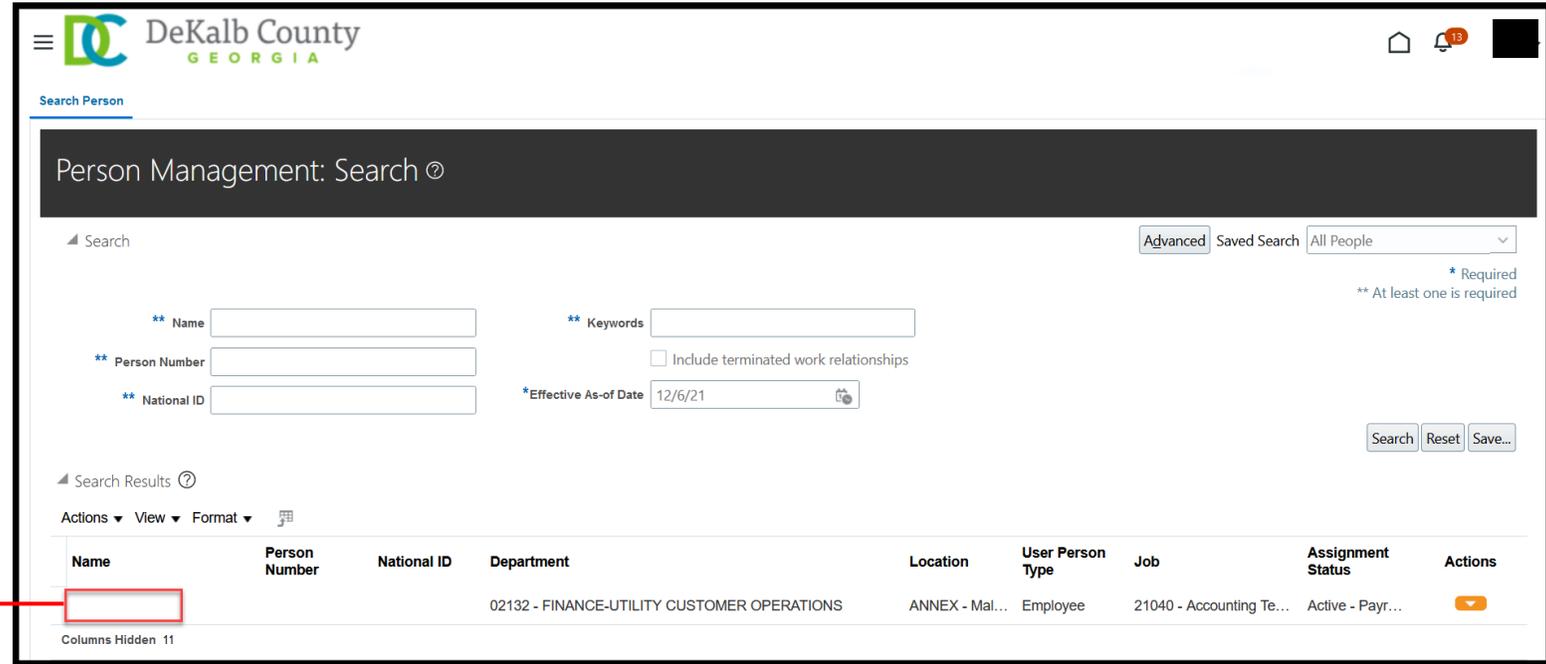
4

Select the Search button

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

5

From the Search Results section, select the Employee's Name link



DeKalb County GEORGIA

Person Management: Search

Search

Advanced Saved Search All People

** Name ** Keywords

** Person Number Include terminated work relationships

** National ID *Effective As-of Date 12/6/21

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
[Red Box]			02132 - FINANCE-UTILITY CUSTOMER OPERATIONS	ANNEX - Mal...	Employee	21040 - Accounting Te...	Active - Payr...	

Columns Hidden 11

6

From the Employment page, select the Panel Drawer icon



DeKalb County GEORGIA

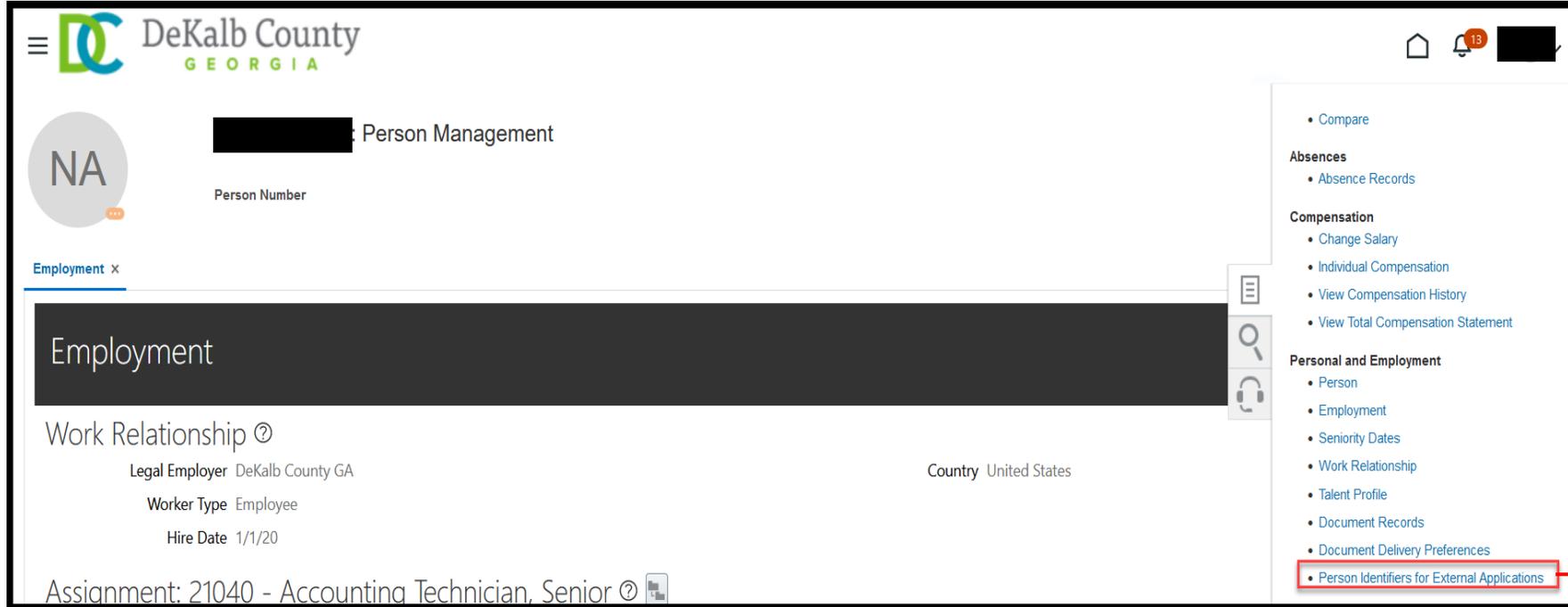
Person Management

Person Number

Employment x

Employment Done

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

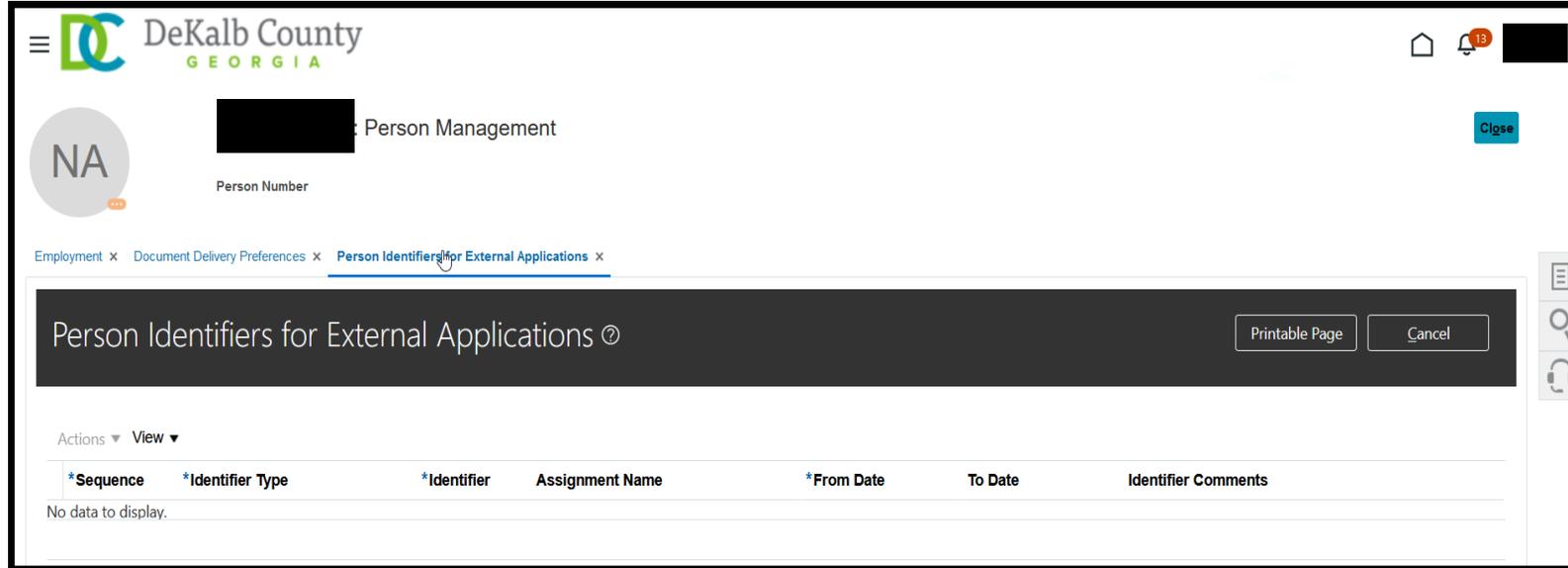


The screenshot shows the DeKalb County Georgia HR system interface. The top left features the DeKalb County logo and the text 'DeKalb County GEORGIA'. The top right has a home icon, a notification bell with '13', and a user profile icon. Below the logo is a circular profile picture with 'NA' and a 'Person Management' label. A 'Person Number' field is visible. The main content area is titled 'Employment' and shows 'Work Relationship' details: 'Legal Employer DeKalb County GA', 'Country United States', 'Worker Type Employee', and 'Hire Date 1/1/20'. At the bottom, it says 'Assignment: 21040 - Accounting Technician, Senior'. On the right, a panel drawer is open, listing various options. The 'Person Identifiers for External Applications' link is highlighted with a red box. A blue circle with the number '7' is connected to this link by a red line.

7

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

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



DeKalb County
GEORGIA

Person Management

Person Number

Employment x Document Delivery Preferences x **Person Identifiers for External Applications** x

Person Identifiers for External Applications ⓘ

Printable Page Cancel

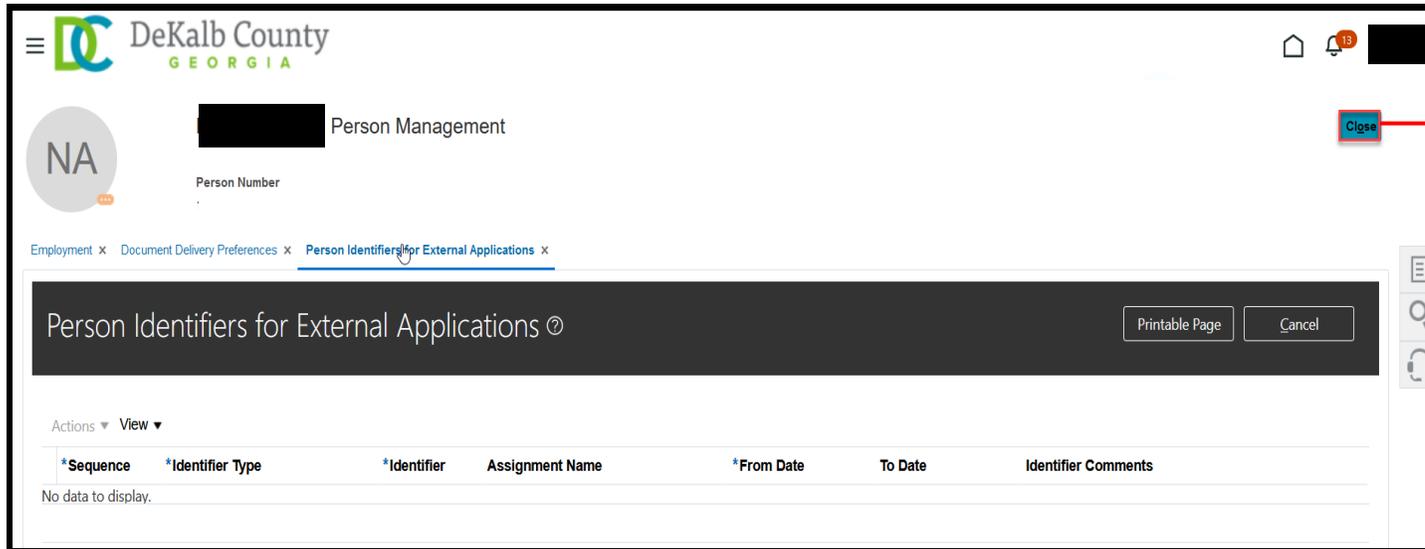
Actions ▾ View ▾

*Sequence	*Identifier Type	*Identifier	Assignment Name	*From Date	To Date	Identifier Comments
No data to display.						

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

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



DeKalb County
GEORGIA

Person Management

Person Number

Person Identifiers for External Applications

Printable Page Cancel

Actions View

*Sequence	*Identifier Type	*Identifier	Assignment Name	*From Date	To Date	Identifier Comments
No data to display.						

9

Once the Coordinator has completed reviewing the Person Identifiers for External Applications details or there are none, 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*

Manage Employment: Knowledge Check

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



Manage Employment: Knowledge Check

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

Manage Employment: Knowledge Check

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



Manage Employment: Knowledge Check

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