

# Payroll Coordinators

## 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:

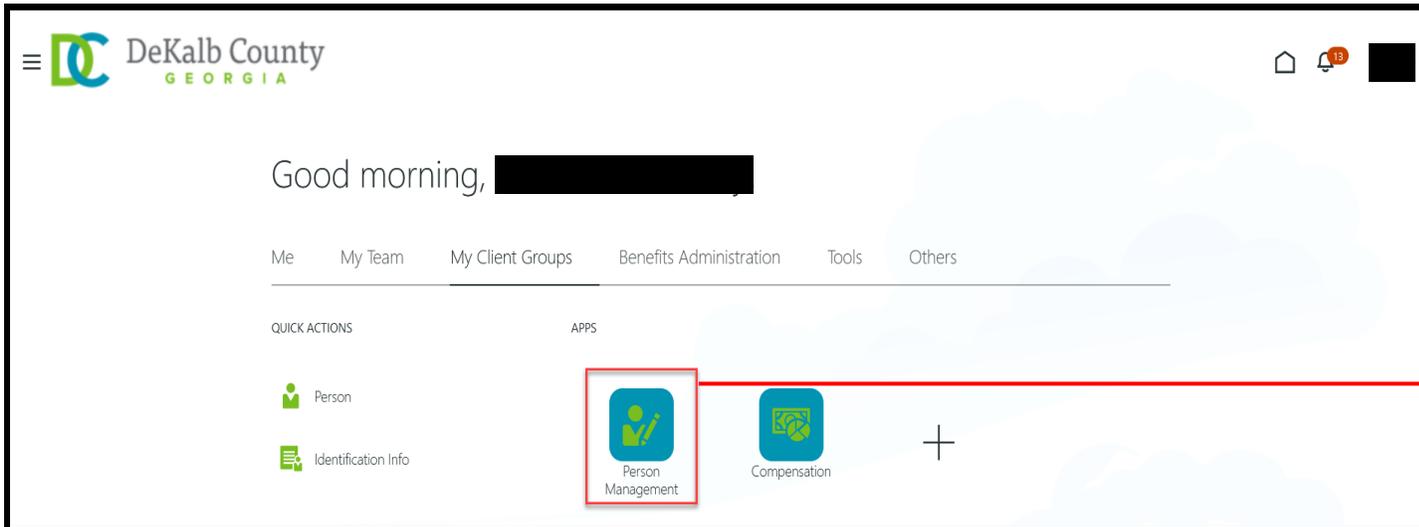
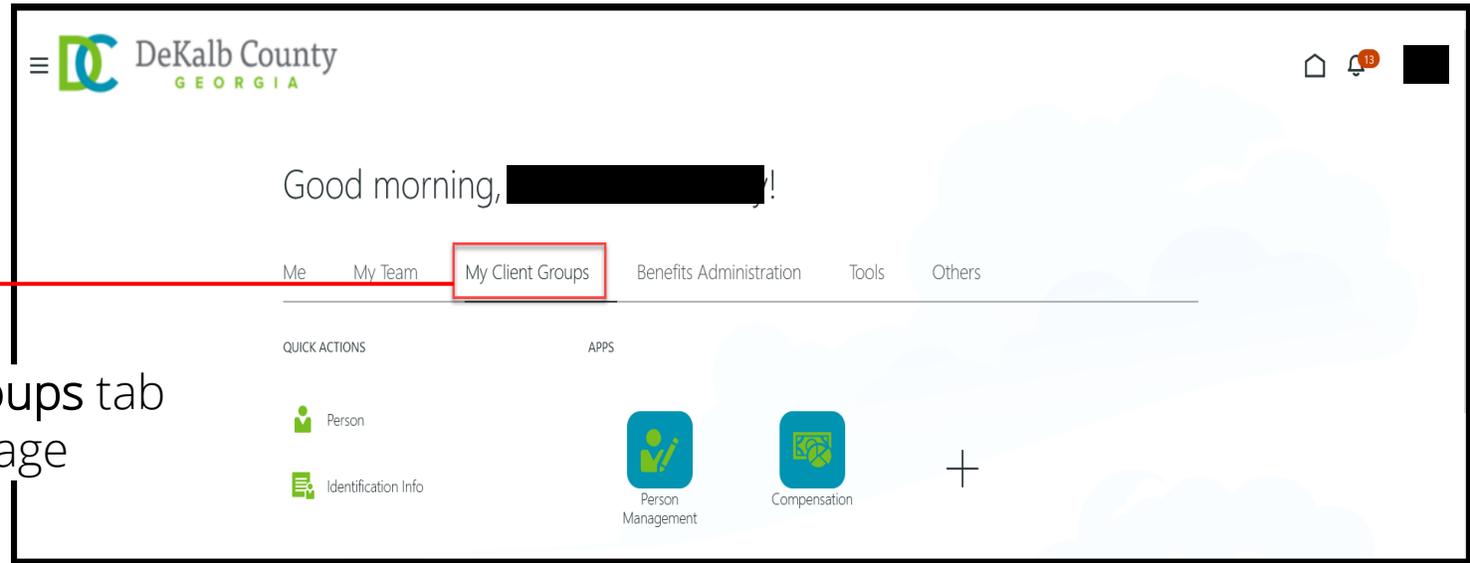
### Objective

- View an Employee's Personal and Biographical Information

# Manage Person: View an Employee's Demographic and Biographic Information

1

Select the My Client Groups tab from the CV360 homepage



*The Payroll Coordinator will have View Only access in this section*

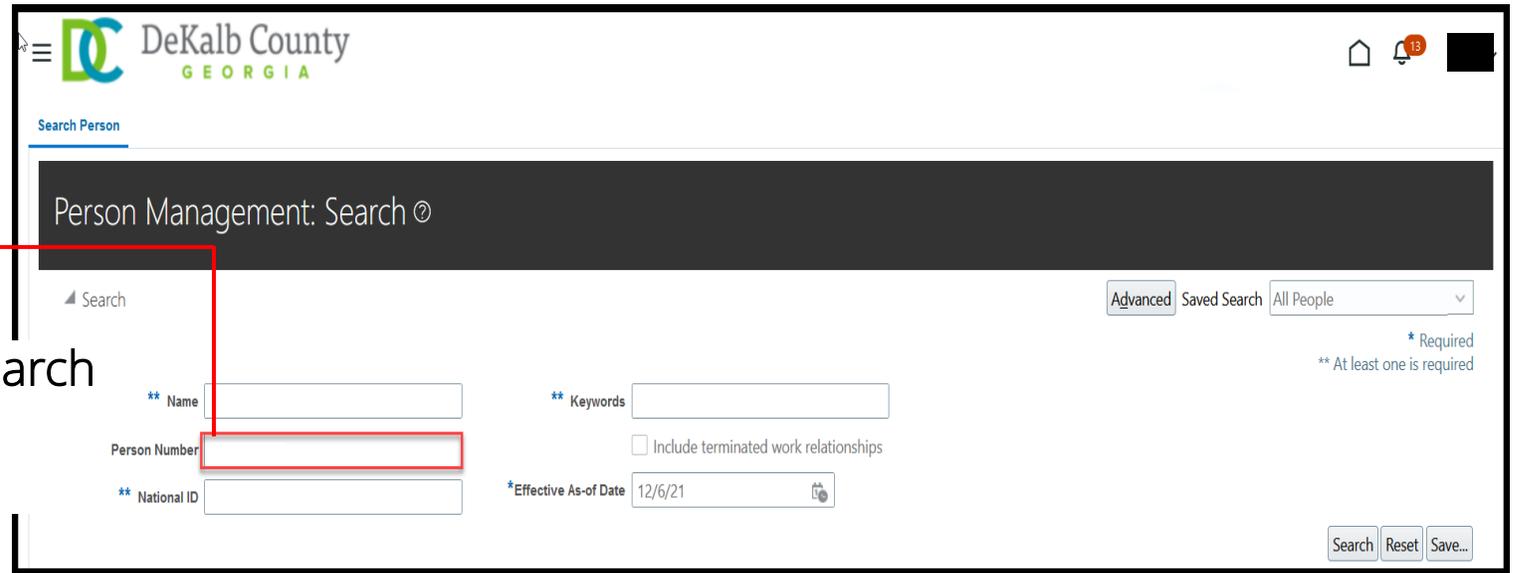
2

Select the Person Management tile within the Apps area

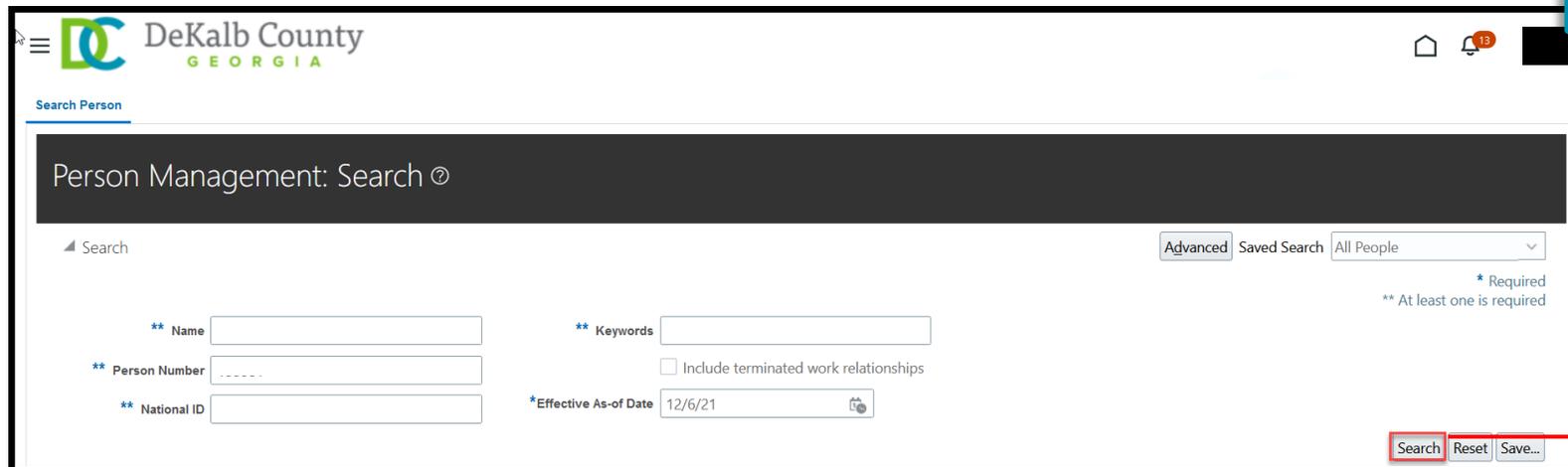
# Manage Person: View an Employee's Demographic and Biographic Information

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 checkboxes for 'Include terminated work relationships' and a date field for 'Effective As-of Date'. Buttons for 'Search', 'Reset', and 'Save...' are at the bottom right.



The screenshot shows the same 'Person Management: Search' page. The 'Search' button is highlighted with a red box. A blue exclamation mark icon is positioned above the button.

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

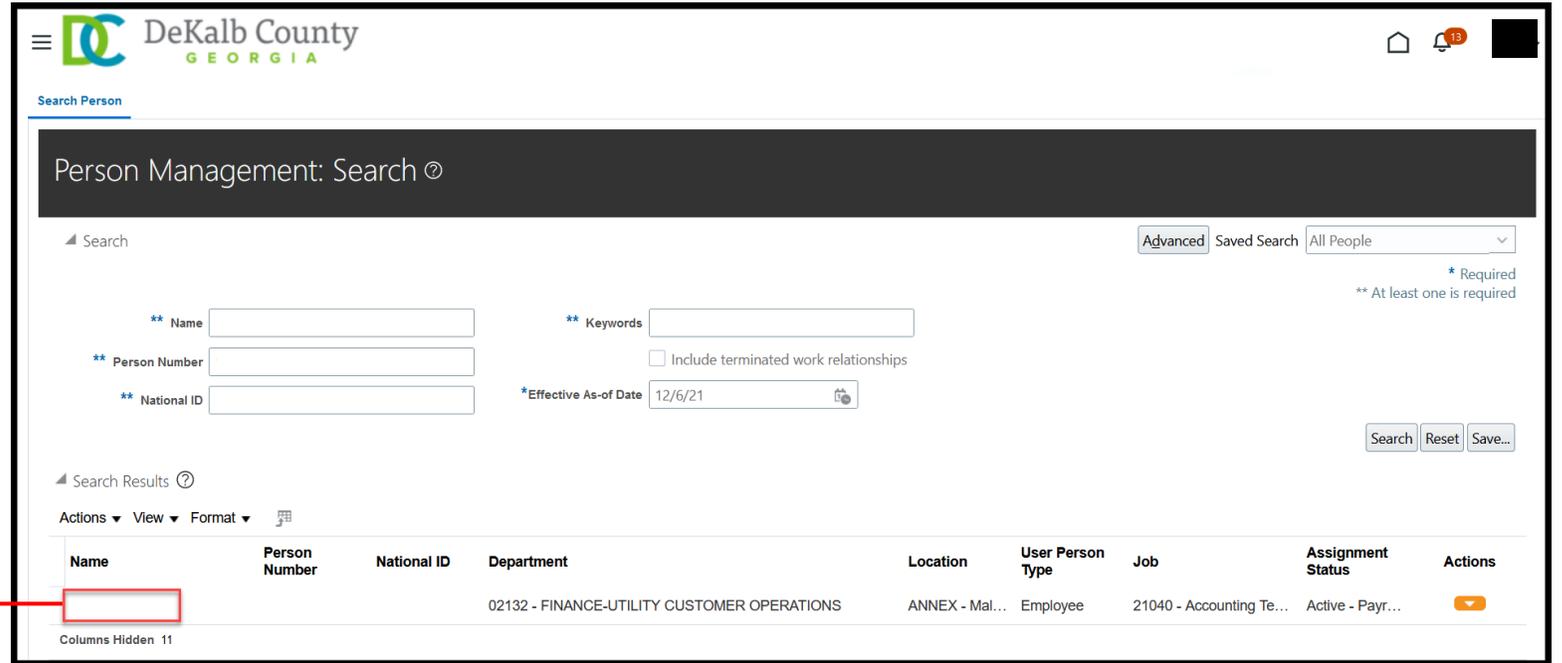
4

Select the Search button

# Manage Person: View an Employee's Demographic and Biographic Information

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

\*\* National ID

\* Effective As-of Date 12/6/21

Include terminated work relationships

\* Required  
\*\* At least one is required

Search Reset Save...

Search Results

Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
<a href="#">[Redacted]</a>			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

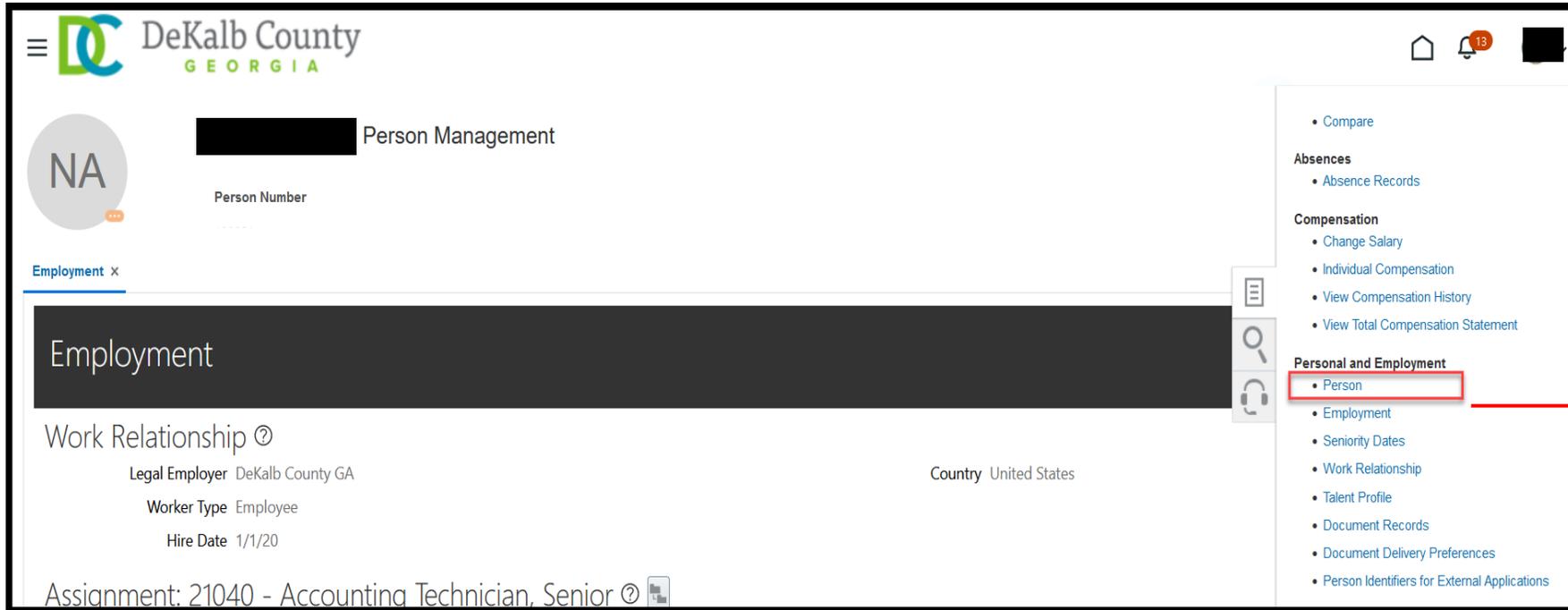
Done

Panel Drawer icon

6

From the Employment page, select the Panel Drawer icon

# Manage Person: View an Employee's Demographic and Biographic Information



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

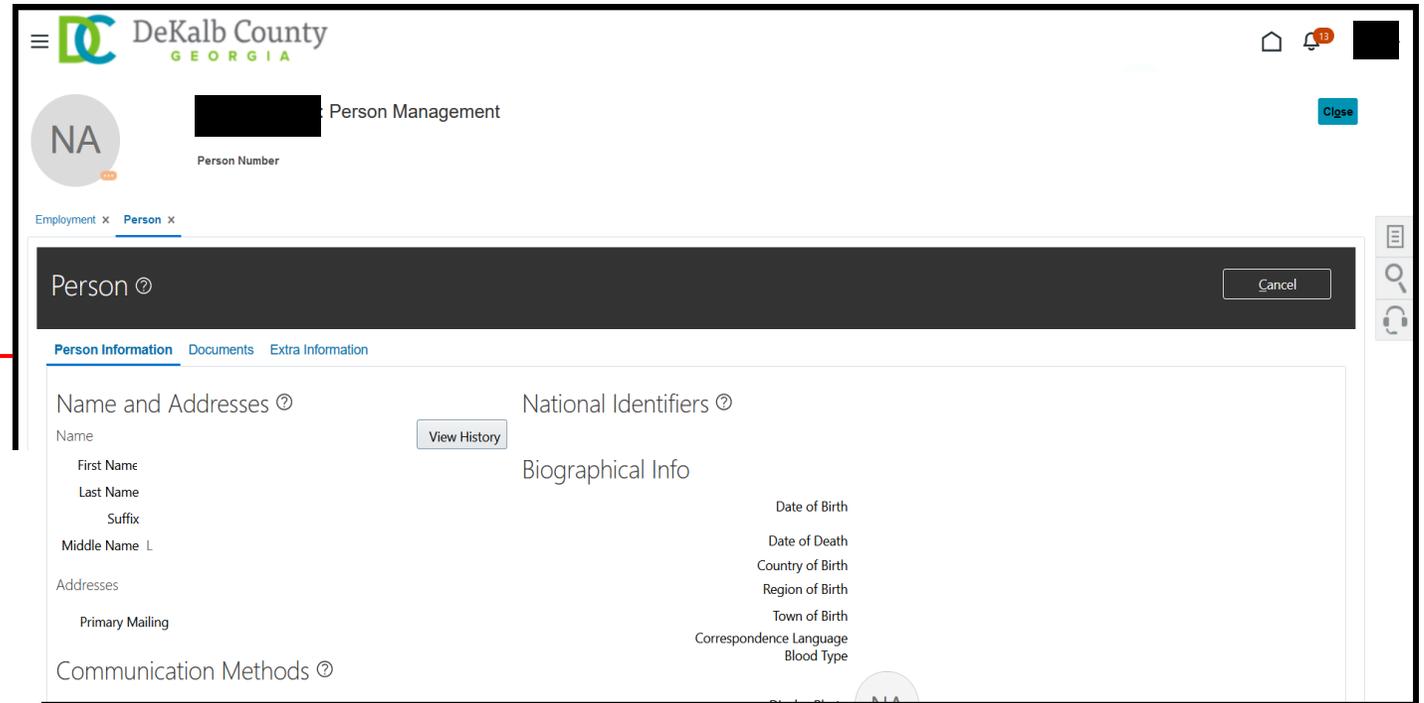
7

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

# Manage Person: View an Employee's Demographic and Biographic Information

8

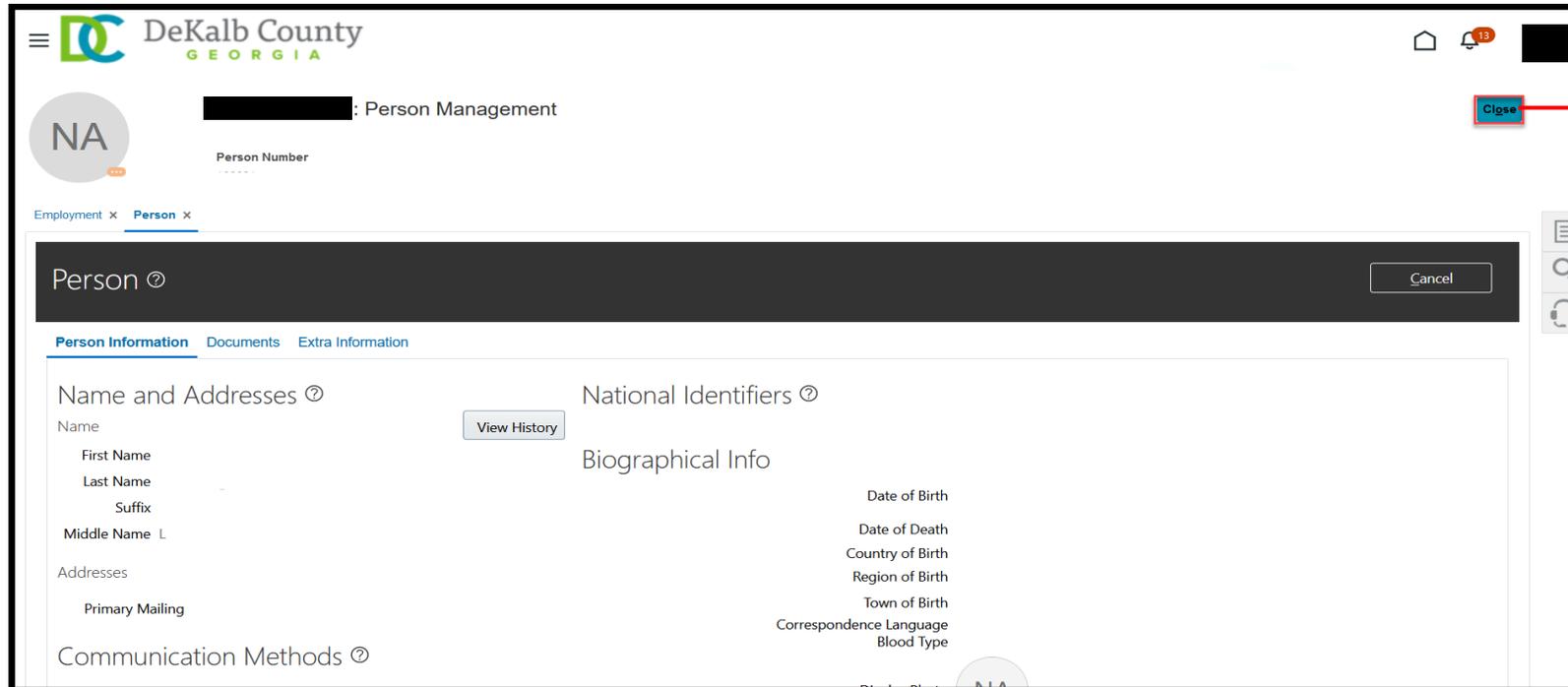
From the **Person** page, the Coordinator can view the Employee's Biographical and Demographic Information such as Name and Address, Communication Methods, Biographical Information, and Legislative Information. Scroll down through the page to view the complete details



The screenshot displays the 'Person Management' interface for DeKalb County, Georgia. The page is titled 'Person Management' and shows a 'Person Number' field with a redacted value. The main content area is divided into several sections: 'Name and Addresses', 'National Identifiers', 'Biographical Info', 'Addresses', and 'Communication Methods'. The 'Biographical Info' section includes fields for 'Date of Birth', 'Date of Death', 'Country of Birth', 'Region of Birth', 'Town of Birth', 'Correspondence Language', and 'Blood Type'. A 'View History' button is visible next to the 'Name' section. The interface also includes a 'Cancel' button and a 'Close' button in the top right corner.

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

# Manage Person: View an Employee's Demographic and Biographic Information



DeKalb County  
GEORGIA

NA : Person Management

Person Number

Employment x Person x

Person

Cancel

Person Information Documents Extra Information

Name and Addresses National Identifiers

Name View History

First Name

Last Name

Suffix

Middle Name L

Addresses

Primary Mailing

Communication Methods

National Identifiers

Biographical Info

Date of Birth

Date of Death

Country of Birth

Region of Birth

Town of Birth

Correspondence Language

Blood Type

9

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



CloudVergent 360

## Lesson Objective:

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

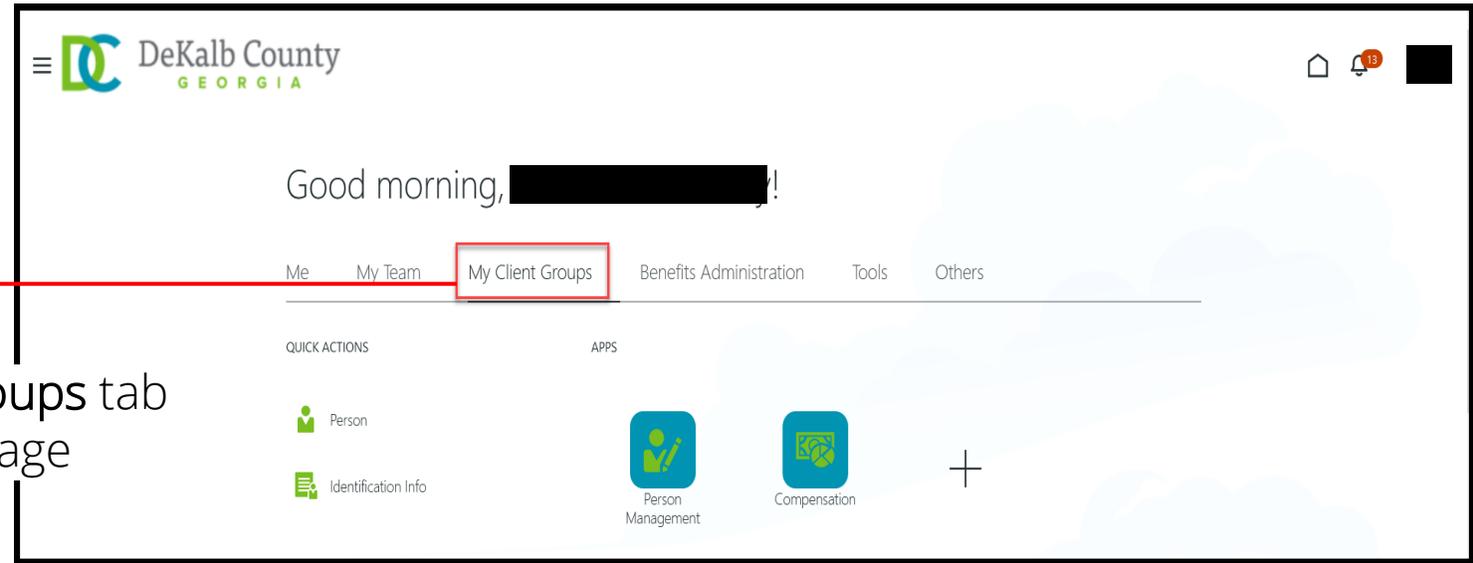
### Objective

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

# Manage Person: View an Employee's Extra Information

1

Select the My Client Groups tab from the CV360 homepage

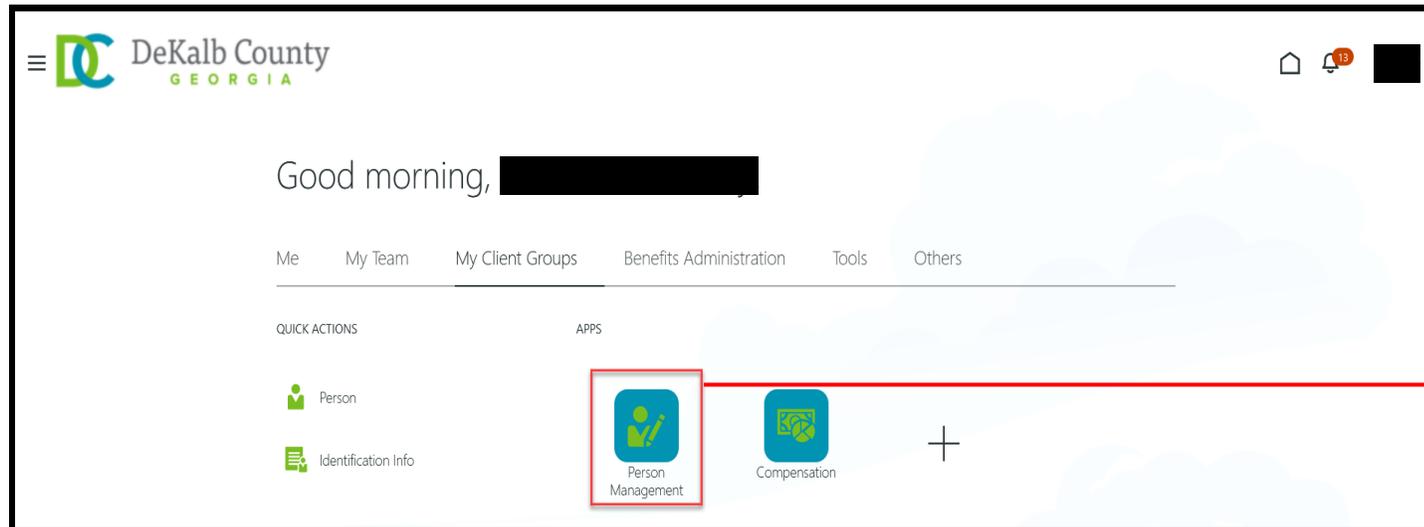


!

*The Payroll Coordinator will have View Only access in this section*

2

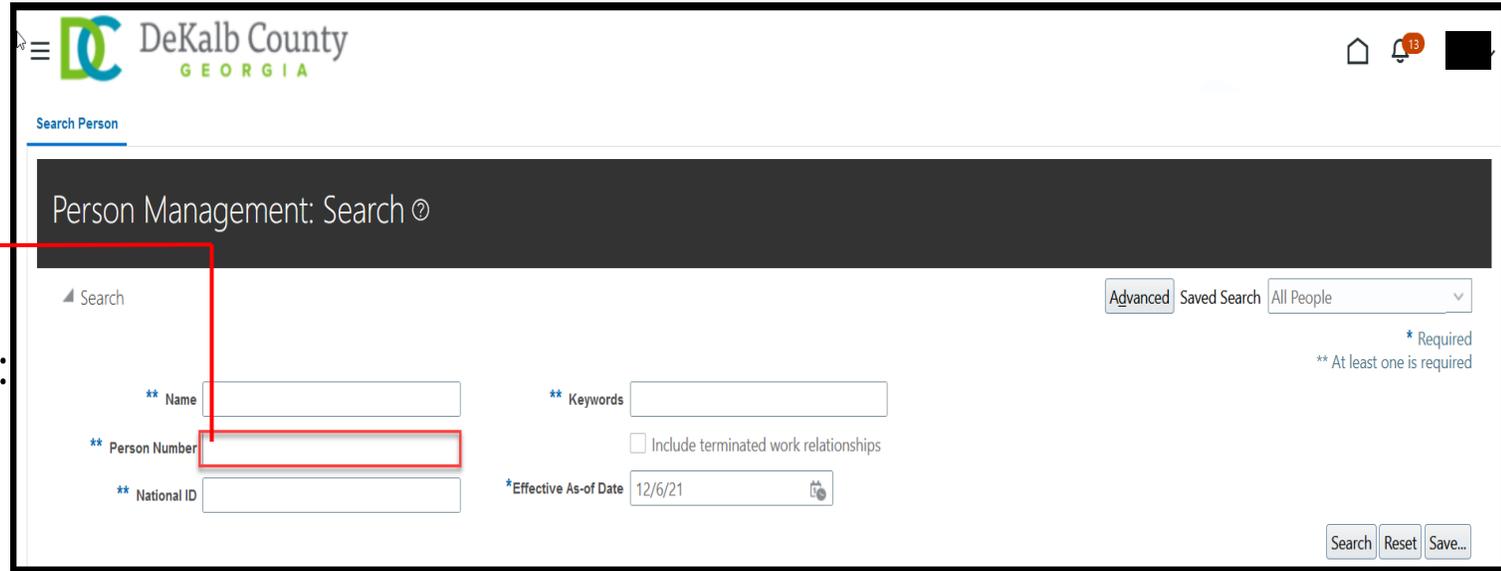
Select the Person Management tile within the Apps area



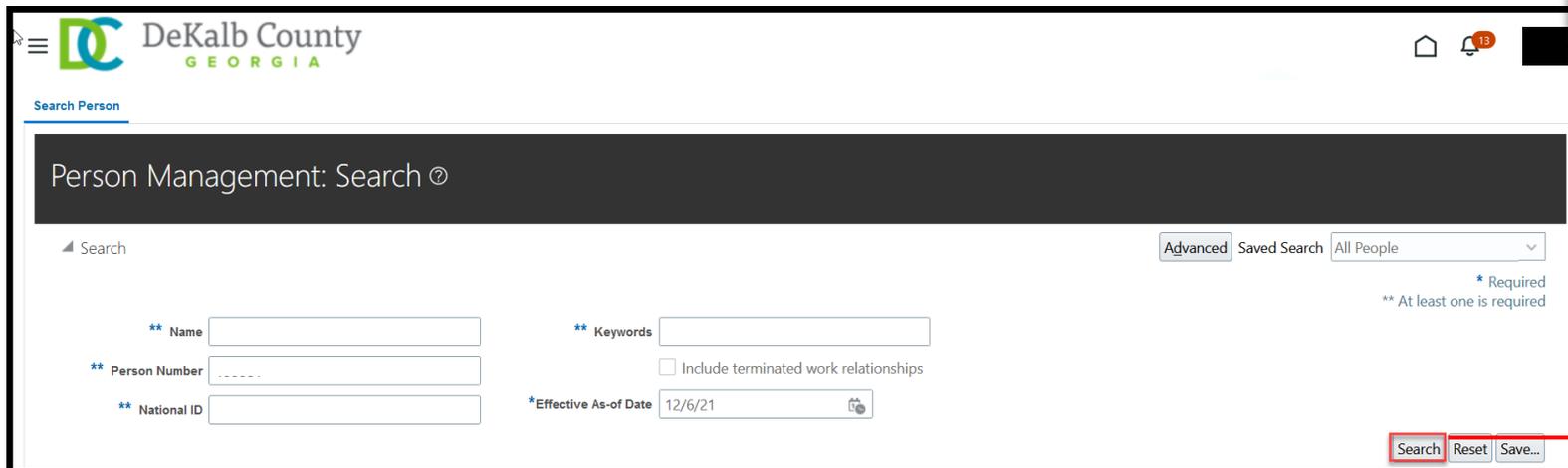
# Manage Person: View an Employee's Extra Information

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 the following fields: **\*\* Name**, **\*\* Person Number**, **\*\* National ID**, **\*\* Keywords**, **\* Effective As-of Date** (set to 12/6/21), and an  for 'Include terminated work relationships'. There are also buttons for 'Advanced', 'Saved Search', and a dropdown menu for 'All People'. The search form is highlighted with a red box, and a red line connects it to the number '3' in the adjacent text.



The screenshot shows the same 'Person Management: Search' page. The 'Search' button is highlighted with a red box, and a red line connects it to the number '4' in the adjacent text.

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

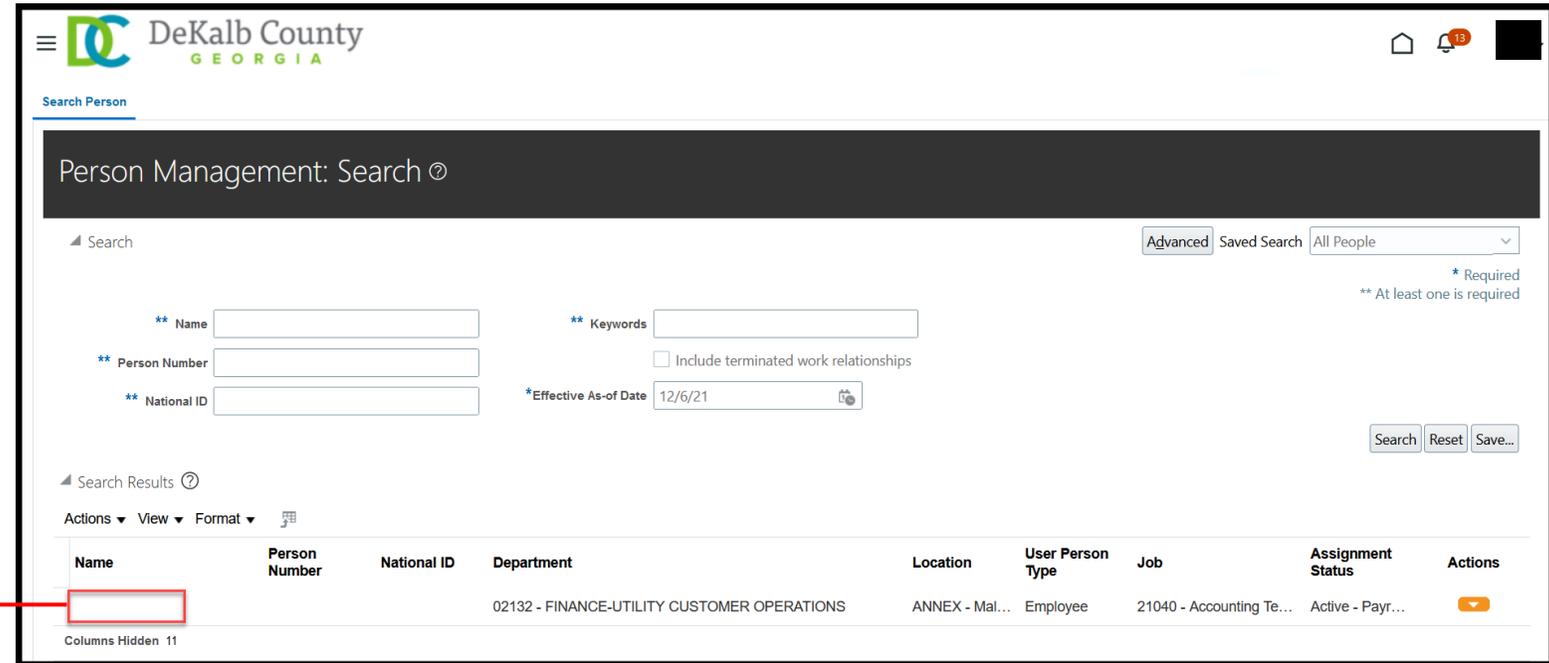
4

Select the Search button

# Manage Person: View an Employee's Extra Information

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

\* Required  
\*\* At least one is required

Search Reset Save...

Search Results

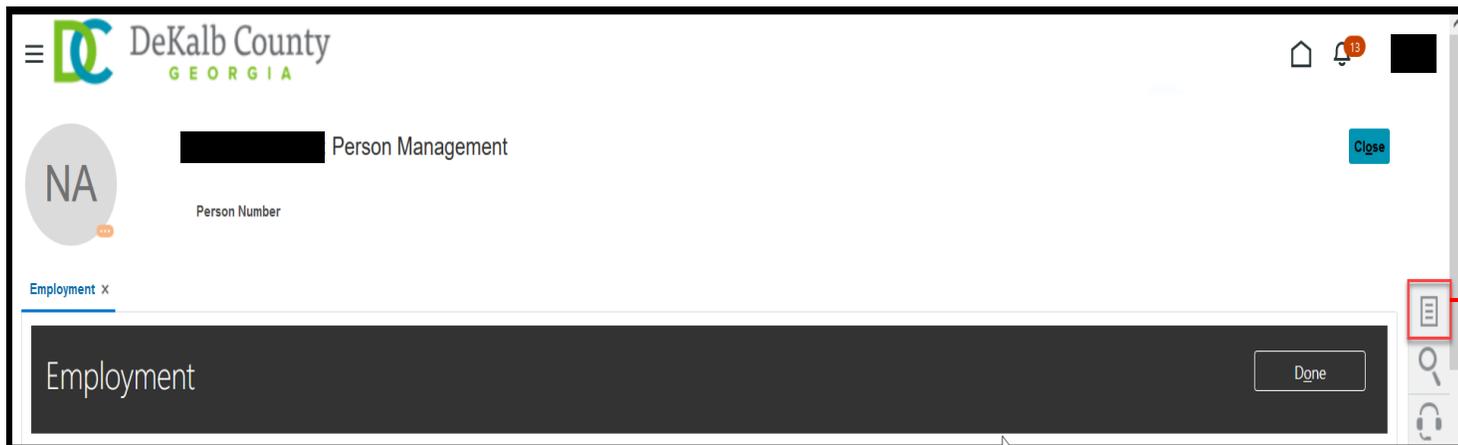
Actions View Format

Name	Person Number	National ID	Department	Location	User Person Type	Job	Assignment Status	Actions
<a href="#">[Red Box]</a>			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

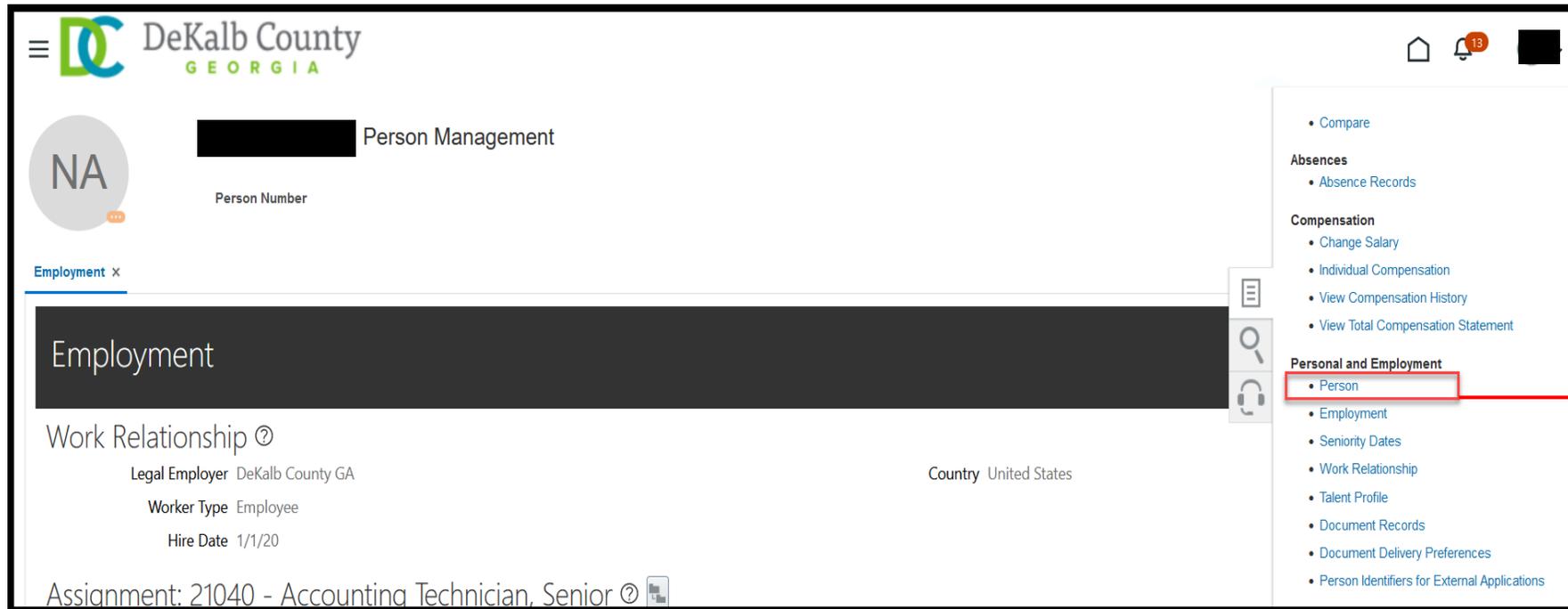
Person Management

Person Number

Employment x

Employment Done

# Manage Person: View an Employee's Extra Information



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

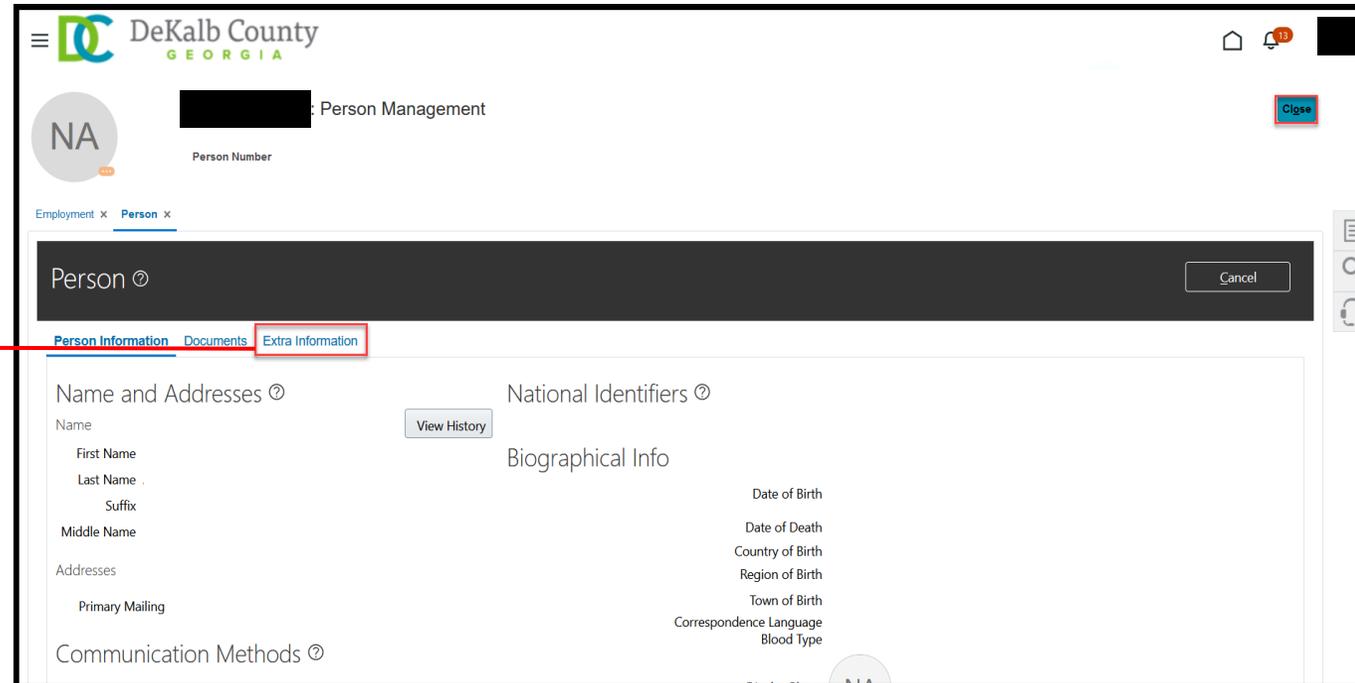
7

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

# Manage Person: View an Employee's Extra Information

8

From the Person page, select the Extra Information tab

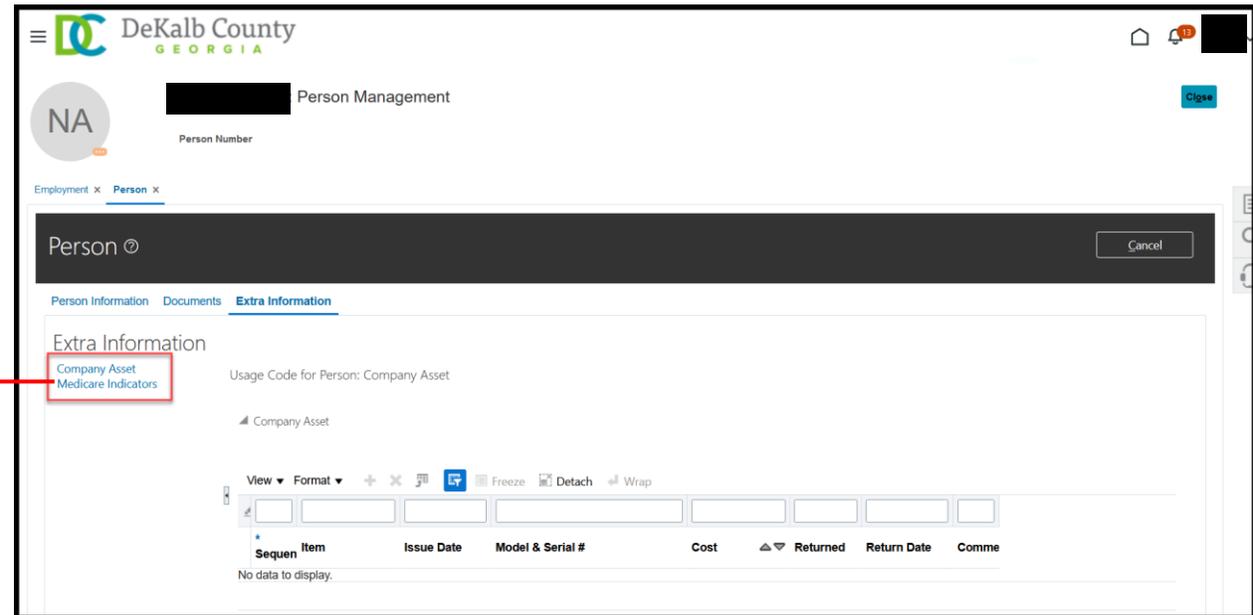


The screenshot shows the DeKalb County Georgia Person Management interface. At the top, there is a navigation bar with the DeKalb County logo and the text "DeKalb County GEORGIA". Below this, there is a header area with a user profile icon (NA), a person number, and a "Close" button. The main content area is titled "Person" and has a "Cancel" button. There are three tabs: "Person Information", "Documents", and "Extra Information". The "Extra Information" tab is highlighted with a red box. Below the tabs, there are several sections: "Name and Addresses", "National Identifiers", "Biographical Info", and "Communication Methods". The "Name and Addresses" section includes fields for First Name, Last Name, Suffix, Middle Name, and Addresses (Primary Mailing). The "National Identifiers" section includes a "View History" button. The "Biographical Info" section includes fields for Date of Birth, Date of Death, Country of Birth, Region of Birth, Town of Birth, Correspondence Language, and Blood Type.

# Manage Person: View an Employee's Extra Information

9

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

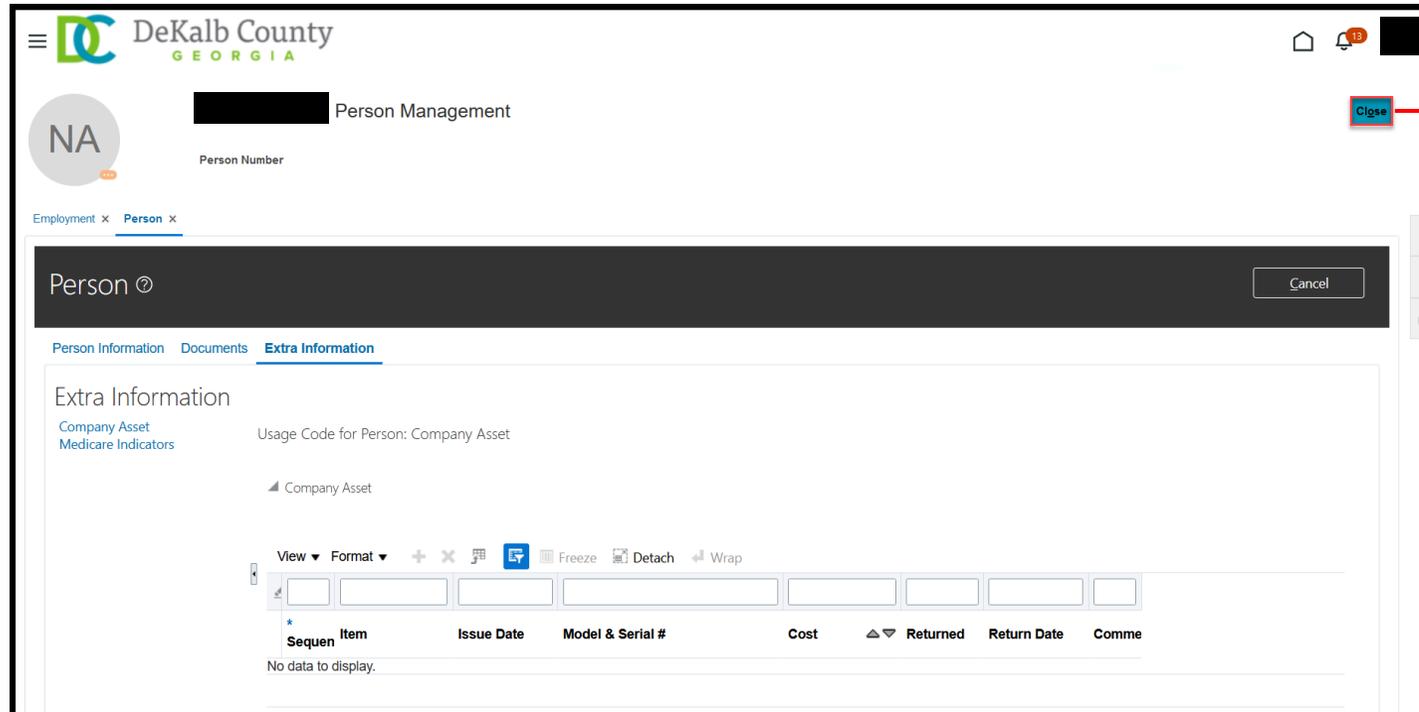


The screenshot shows the DeKalb County Georgia Person Management interface. The 'Person Management' page is open, displaying the 'Person' tab. The 'Extra Information' sub-tab is selected, showing a list of links for 'Company Asset' and 'Medicare Indicators'. A red box highlights these links. Below the links, there is a table with columns for 'Sequen', 'Item', 'Issue Date', 'Model & Serial #', 'Cost', 'Returned', 'Return Date', and 'Comme'. The table currently displays 'No data to display.'



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

# Manage Person: View an Employee's Extra Information



10

Once the Coordinator has completed reviewing the Extra Information 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*

## Manage Person: Knowledge Check

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*



## Manage Person: Knowledge Check

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

## Manage Person: Knowledge Check

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

A. *True*

B. *False*



## Manage Person: Knowledge Check

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