Maintaining Employee Information

Handout Manual

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Course Introduction

Navigating WebEx

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Course Agenda

The course will include the following topics:

- Hiring or Rehiring an Employee
- Changing Employee Data
- Terminating an Employee
- Adding Another Position for an Employee
- Archiving Employee Data
- Running Standard Reports to Verify Changes

TheBridge.adp.com

TheBridge.adp.com is an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics. You can access TheBridge.adp.com to do the following and more:

- Learn how other professionals are getting more from their ADP solutions with time-saving resources and helpful features.
- Join community spaces or topics of interest, including tax, payroll, HR and benefits, and time and labor management.
- Connect with other payroll practitioners, HR professionals, featured industry representatives, and ADP subject matter experts.
- Share your experiences.
- Check the Frequently Asked Questions or ask the community.

Implementation Questions

List any follow-up items that you may need to discuss with your implementation consultant (IC):

- ___________________________________________
- ___________________________________________
- ___________________________________________
- ___________________________________________
- ___________________________________________
Hiring or Rehiring an Employee

Overview
To hire or rehire an employee, in ADP Workforce Now, you use the New Hire wizard to take you through the process of entering a new employee’s personal, employment, payroll, tax, and time and attendance information.

What Is the New Hire Workflow?

Overview
The way your company is structured will determine the specific workflow for your organization.

Description
The new hire workflow is the process that your company uses to enter new hires in ADP Workforce Now. You may be the only practitioner at your company and you enter all new hire data, or you may be one of two or three practitioners at your company who enter new hire data. All practitioners use the New Hire wizard when entering the data.

Example
Acme Products has multiple practitioners. The human resource (HR) practitioner completes the first steps in the wizard by entering information such as hire date and business unit. The employee record is then handed off to the Payroll practitioner who enters information such as pay frequency and exemptions. In some cases, a Time & Attendance practitioner is responsible for entering information related to time and attendance.

Important Information
The tasks required for entering a new hire can include an approval step if your company requires it.
What Are New Hire Templates?

■ **Description**

To begin the new hire process, you select a template. The template consists of information such as the following:

- The required and optional fields
- A list of users who will participate in entering new hires
- The approval process

Use an ADP-supplied system template or a custom template that you create.

**Note:** During implementation, your ADP representative will help you to set up any custom templates that you need to get started.

■ **Example**

You hire a contractor who will not be paid through ADP Workforce Now Payroll but will track time in ADP Workforce Now Time & Attendance. When entering the new hire in the New Hire wizard, you select the ADP-supplied template HR + Time.

■ **Quick Hire**

You use the Quick Hire template when you need to quickly enter a new hire who is paid through ADP Workforce Now. This one-page template includes only the fields necessary to enter personal, employment, payroll, and tax information for the new hire. You need to enter any additional information, such as direct deposit or benefits, on the applicable pages of the People menu.

■ **Important Information**

Be sure to familiarize yourself with the available templates before entering a new hire. Select a template that includes the fields or settings that you need to set up a new employee. For example, if an employee is being paid through ADP Workforce Now, you must use a template that includes payroll fields.

■ **Additional Resource**

For more information about creating new hire templates, refer to the *Creating New Hire and Status Change Templates in ADP Workforce Now* self-study on Learn@ADP.
Learning Activity: What Can You Get Done in 2 Minutes?

Scenario
Your company has hired Marcie Zimmer as an IT analyst. She will be a full-time employee, and she will track her time using an online timesheet. In your company, only one practitioner is needed to enter a new hire.

Learning Byte Question and Answer
1. What do you access to begin the hiring process?

2. What happens if you do not complete all of the required fields?
What Is a Custom Template?
In addition to using the ADP-supplied system templates, you can create your own custom templates.

Important Information

- First Name is a required field for all employee records.
- You can enter new hire and other employee changes during any step of the payroll cycle.
- The department that you enter on the Time and Attendance page must match the department that you enter on the Employment page.
- Verify compliance information for each state and local tax so you know which additional tax fields are required for your company. For example, depending on your state, marital status and exemptions may revert to the employee’s federal tax selections if they are not entered separately.

Additional Resources

<table>
<thead>
<tr>
<th>If You Need More Information About</th>
<th>Then Refer To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits enrollments</td>
<td>Enhanced Benefits Setup for ADP Workforce Now virtual class on Learn@ADP</td>
</tr>
<tr>
<td>New hire templates</td>
<td>Creating New Hire and Status Change Templates in ADP Workforce Now self-study on Learn@ADP</td>
</tr>
<tr>
<td>Hiring an employee</td>
<td>Hiring an Employee learning byte on the Support Center under Just-in-Time Learning.</td>
</tr>
</tbody>
</table>
What Are Additional New Hire Tasks?

Overview
After his or her new hire record has been submitted and approved, the new employee may need to perform some tasks in ADP Workforce Now.

Description
The employee’s new-hire tasks can include the following:
- Entering license or certification information
- Acknowledging company policies
- Verifying personal data

These tasks are configured to meet the specific needs of your organization.

Note: Your employees can access online Help for information about how to complete these tasks.

Example
Your company requires new hires to log on to ADP Workforce Now to review and electronically sign company policies. The following illustration is an example of the employee's Company Policies page.

![Company Policies Page]

Important Information
If you make a mistake when you enter a new-hire record, you can delete the new-hire record before it is part of the next payroll, eliminating the need to terminate the employee. Use this feature only in one of the following situations:
- You assigned the wrong company code when you entered the new-hire record.
- You designated the new hire as to be paid through Payroll when the position should be nonpaid.
- The new employee did not start work.

Additional Resource
For more information about deleting a new-hire record, refer to online Help and the Deleting a New Hire learning byte on the Support Center under Just-in-Time Learning.
What Is Rehiring an Employee?

| Overview |
You can use the New Hire wizard to rehire employees who were previously terminated.

| Description |
You rehire an employee when an employee who was previously terminated returns to work as an active employee.

| Example |
Ricardo Ortega left the company and now Geneva Entertainment wants to rehire him.
The following illustration is an example of the alert message that is displayed when you begin the rehire process.

Note: To rehire the employee, click the position ID.

| Additional Resource |
For more information about rehiring an employee, refer to online Help and the Rehiring an Employee learning byte on the Support Center under Just-in-Time Learning.
Changing Employee Data

Overview
You may need to change employee data for reasons such as status changes, job changes, or salary changes.

The Employee Status Change Process

Overview
You may need to change an employee’s status for the following reasons:

- Retirement
- Leave of absence
- Termination
- Rehire

To keep accurate records, you need to indicate the reason for the status change, determine additional impacts of these changes to the employee record, and then make the changes.

Stages and Descriptions
When you change an employee’s status, you must complete the following process.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine and enter the effective date, new status, and the reason for the status change.</td>
</tr>
</tbody>
</table>
| 2     | Determine any impact to other areas and make updates as needed. Affected areas can include the following:  
- Pay (an adjustment for mid-cycle or cancel Automatic Pay)  
- Time-off accruals  
- Employee schedule (if changing from part time to full time, or vice versa)  
- Employee Self Service or Manager Self Service accounts  
- Practitioner accounts |

Guideline
If your company tracks full-time equivalency and an employee’s job changes from part time to full time, you must enter 1 in the Full Time Equivalency (FTE) field on the Employment Profile page under Work Schedule.
Explore: Accessing Employee Information from the People Menu

Overview
You use the People menu to view or change information for an individual employee. It is divided into submenus so you can locate information efficiently. The following illustration is an example of the People menu with the Pay submenu selected.

Submenus and Descriptions
The following table describes the submenus on the People menu.

<table>
<thead>
<tr>
<th>Submenu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Information</td>
<td>Includes information such as addresses, emergency contacts, demographic data, compliance-related details, and professional development information</td>
</tr>
<tr>
<td>Employment</td>
<td>Includes employment-related information such as positions, status, hire date, and pay rates</td>
</tr>
<tr>
<td>Pay</td>
<td>Includes payroll-related information such as deductions, direct deposit, tax withholdings, and to-date accumulations</td>
</tr>
<tr>
<td>Benefits</td>
<td>Includes information such as enrollments, dependents, and beneficiaries</td>
</tr>
<tr>
<td>Time &amp; Attendance</td>
<td>Includes information such as timecards, attendance, and monthly schedule</td>
</tr>
<tr>
<td>Time Off</td>
<td>Includes information such as a list of requests, carryover requests, and time-off balances</td>
</tr>
<tr>
<td>Talent</td>
<td>Includes information such as performance reviews and goals and compensation notices</td>
</tr>
</tbody>
</table>
Activity: Placing an Employee on Leave

Scenario
Starting tomorrow, Krista Volker will start an anticipated 12-week family medical leave.

Instructions, Part 1: Starting the Leave Wizard
Starting Point: People > Employment > Employment Profile

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Under Employee List, click the link.  
      | **Result:** The Employee Search window opens. |
| 2    | Search for and select VolkerX, Krista, where X represents the last letter of your user name, as shown in the upper-right corner of the application. |
| 3    | In the Status tile, next to Active, click (edit). |
| 4    | In the Select a New Status field, select Leave.  
      | **Result:** The Select a Leave Template field is displayed. |
| 5    | In the Select a Leave Template field, select Leave (System). |
| 6    | Click Start Leave Wizard.  
      | **Result:** The Place on Leave wizard is displayed. |
## Instructions, Part 2: Completing the Leave Wizard

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | On the **General Options** page, enter the following information and then click **Next**:  
- Leave of Absence Start Date: tomorrow's date  
- Leave Reason: FAM – Family  
- Paid Leave of Absence: Yes |
| 2    | On the **Direct Reports** page, click **Select New Managers**.  
**Result:** The Select New Managers window opens. |
| 3    | In the **Available Managers** list, select TownsendX, James, where X represents the last letter of your user name, as shown in the upper-right corner of the application, and then click (add selected). |
| 4    | Click **Reassign Employees**. |
| 5    | Click **Next**. |
| 6    | On the **Company Property** page, click **Next**. |
| 7    | On the **Direct Deposits** page, click **Next**. |
| 8    | On the **Benefits** page, in the **Terminate Benefits?** field, select No and then click **Next**. |
| 9    | On the **Final Payment** page, click **Next**. |
| 10   | On the **Position** page, click **Next**. |
| 11   | On the **Confirm** page, click **Done**.  
**Result:** The Employment Profile page is displayed. |

### Important Information

If the effective date falls in the middle of a pay period, note the following:
- The new employee status will be effective for the entire pay period.
- You might have to make a pay adjustment.

If the employee going on leave is a Time & Attendance supervisor, he or she must use the Delegation feature to select another manager or supervisor to review and approve employee timecards in the supervisor's absence. In addition, the manager or supervisor who fills in must also use Delegation to access those employees.

### Additional Resource

For more information about the Delegation feature, refer to online Help and the Delegation learning bytes for practitioners, managers, and supervisors on the Support Center under Just-in-Time Learning.
Terminating an Employee

Overview

You use the Termination wizard to take you through the process of terminating an employee. During this process, you will use either an ADP-supplied system template or a custom template that you create.

Note: The way your company is structured will determine the specific termination workflow for your organization.

The Termination Process

Overview

When you process an employee termination, you begin by changing the employee's status to Terminated. This change has an impact on other aspects of the employee's record that must be updated to reflect the termination.

Stages and Descriptions

The following table describes the stages in the employee termination process.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the appropriate template and start the termination.</td>
</tr>
<tr>
<td>2</td>
<td>Enter the termination date, reason, and other general information, and stop the employee's pay.</td>
</tr>
<tr>
<td>3</td>
<td>If applicable, change additional information such as terminating benefits, stopping direct deposit, recording the return of company property, reassigning direct reports, terminating wage garnishment, and entering final payment information.</td>
</tr>
<tr>
<td>4</td>
<td>When appropriate, cancel Automatic Pay. If the termination date is outside of the current pay period, you will see a list of payroll cycles. Select the payroll cycle week in which Automatic Pay will stop. The system will cancel Automatic Pay for the selected week and all weeks going forward.</td>
</tr>
<tr>
<td>5</td>
<td>Confirm and approve the termination.</td>
</tr>
</tbody>
</table>

Important Information

- The termination effective date that you enter is the employee's last day of work.
- The tasks for terminating an employee can include an approval step, if your company requires it.
Learning Activity: Job Change Consequences

Scenario
Employees may change jobs within your company or your company may reorganize, causing changes to employees’ job titles, home departments, and so on. In either case, job changes can affect other elements of employees' records.

Instructions
What changes can accompany an employee's promotion, transfer, relocation, or demotion?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

Important Information
When you enter a supervisor or manager start date that is in the middle of a pay period, you enable that supervisor or manager to view the reporting structures for the entire pay period.
How Do User Rights and Workflow Affect Recording Job Changes?

Overview
Depending on your individual responsibilities and the workflow in your company, you may be responsible for entering some or all of the data associated with an employee’s job change. If your company uses Self Service, your managers may be able to enter some of these changes.

Description
Depending on your company’s policy, some changes made by managers may require final HR approval.

<table>
<thead>
<tr>
<th>Change Needed</th>
<th>Employee</th>
<th>Manager</th>
<th>HR Practitioner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Salary or earnings</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Reporting relationships</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Corporate groups (location, home department, business unit, company class)</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Contact information</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Work phone, fax, mail stop</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Tax information</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time zone</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Example
Your managers can enter requests to change an employee's job title and salary. However, your company’s setup requires HR practitioner approval before any changes are applied in ADP Workforce Now.

Additional Resource
For more information about setting up workflows, refer to the Workflow Management for ADP Workforce Now course on Learn@ADP.
Activity: Entering a Salary Change

Scenario
Brenda Hahn will receive a pay raise due to her recent performance. Brenda's new hourly rate is $21.

Instructions
Starting Point: People > Employment > Employment Profile

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Under Employee List, click the link.  
      Result: The Employee Search window opens. |
| 2    | Search for and select HahnX, Brenda, where X represents the last letter of your user name, as shown in the upper-right corner of the application. |
| 3    | In the Regular Pay tile, click (edit).  
      Result: The Regular Pay page is displayed. |
| 4    | In the Change Will Be Effective field, enter today’s date. |
| 5    | In the Change Reason field, select PERF – Performance. |
| 6    | In the Regular Pay Rate field, change the hourly amount to 21. |
| 7    | Click Done. |

Important Information
- When you enter a new value in an effective-dated field, the value that is being replaced is saved as part of a historical record.
- Your company may decide to display employee pay rates, which will enable your employees to view their earnings when they access Self Service.
- You can view historical pay records for employees by clicking (edit) in the Regular Pay tile. On the Regular Pay page, the timeline is displayed on the left.

Additional Resource
For more information about Automatic Pay and paydata grids, refer to the Payroll for ADP Workforce Now course on Learn@ADP.

Tip
If you know that the salary will increase by a percentage, click the Rate Change Calculator link on the Regular Pay page to have the new amount calculated automatically.
Adding Another Position for an Employee

What Is Multiple Positions?

Description

Multiple Positions is a feature in ADP Workforce Now that enables you to add a position for an existing employee so that you can track the employee in two or more active positions, paid or nonpaid, at the same time.

Example

Barbara Pincent is a registered nurse (RN) at Sunrise Extended Care. She also serves as an RN at Sunrise Nursing Home. She reports to the director of nursing at the extended care facility and the nursing supervisor at the nursing home and is paid differently for each position.

When Should You Use Multiple Positions?

The following table indicates when you should use Multiple Positions or another feature.

<table>
<thead>
<tr>
<th>If the Employee Serves In</th>
<th>Then Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than one position (paid or nonpaid)</td>
<td>Multiple Positions</td>
</tr>
<tr>
<td>More than one position and multiple Forms W-2 are required because payments are issued under separate federal tax identification numbers</td>
<td>Multiple Positions</td>
</tr>
<tr>
<td>Multiple positions and reports to two or more different managers</td>
<td>Multiple Positions</td>
</tr>
<tr>
<td>One position and changes state or local jurisdiction as a result of a transfer to a different location</td>
<td>Transfer Employee</td>
</tr>
<tr>
<td>One position and requires that a percentage or number of hours worked and be allocated to different departments</td>
<td>Automatic Labor Allocation</td>
</tr>
</tbody>
</table>
### Important Information

- When you set up an employee with a new paid position, an additional file number is created through Payroll. A separate Form W-2 will generate at the end of the calendar year for each paid position that the employee holds.

- When an employee holds multiple positions, you must designate one as the primary position. The primary position is the designated source of information for items such as Equal Employment Opportunity (EEO) and Veterans reports.

- If the employee with the additional position is a manager, for the employee to see the My Team tab and have access to his or her direct reports, the primary position must be the managerial position.

### Additional Resource

For more information about adding another position, refer to the *Adding Another Position for an Employee* learning byte on the Support Center under Just-in-Time Learning.

### Tips

- When an employee has multiple positions, the pages that you access from the People menu include an Other Positions link. Click the link to view all of the employee's positions.

- If you added a position for an employee and realized that you made a mistake, you can delete the position in the same way that you delete a new hire.
What Are Paid and Nonpaid Positions?

Description

You can choose whether to pay each position and track time through ADP Workforce Now. The following table describes the difference between paid and nonpaid positions.

<table>
<thead>
<tr>
<th>If the Position Is</th>
<th>Then the Position Is</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid through Payroll</td>
<td>Paid</td>
</tr>
<tr>
<td>Not paid through Payroll</td>
<td>Nonpaid</td>
</tr>
</tbody>
</table>

Examples

- Nicole works as an account developer and is paid through ADP Workforce Now. Her position is a paid position.
- Juliette is a contractor assigned to Geneva Entertainment. She is paid through an outside agency, not through ADP Workforce Now. Her position is a nonpaid position.
Learning Activity: Employee Status and Position Changes

Instructions

Complete the activity that is displayed on your screen.
Practice: Entering Employee Changes

Scenario

You need to enter some employee changes:

- David Franklin received a 4% performance increase yesterday.
- Stephen Carr has just been promoted to a manager in the Maintenance department effective today. In his new position, Stephen’s job title is Manager and he reports to Donald East.
- Marjorie Fitch returned from leave today.

Instructions

Starting Point: People > Employment > Employment Profile

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Change David FranklinX's salary to $5,325.59.</td>
</tr>
</tbody>
</table>
| 2    | Change Stephen CarrX's position and related information. Use PROM for the Job Reason code.  
  **Hint:** When ✚ (add) is next to the applicable field, you can add codes to validation tables while making changes. |
| 3    | Activate Marjorie FitchX now that she has returned from leave. |

**Note:** In each step above, X represents the last letter of your user name, as shown in the upper-right corner of the application.
Practice Results: Entering Employee Changes

David Franklin’s Change

Stephen Carr’s Change
Marjorie Fitch’s Change

[Image of Employment Profile screenshot]
Archiving Employee Data

What Is Archiving Employee Data?
You archive employee data to remove terminated employee records from affecting daily tasks, such as searching for an employee. The archived data can still be included in standard and custom reports.

Note: You can include archived employee data in standard and custom reports even if you do not have the security permissions to archive the data.

Example
Tyronne Diggs is a terminated employee. You need to remove his employee records from employee lists, but you still need to be able to include his employee data in your Terminated Employees custom report. To accomplish this, you archive Tyronne’s employee records.

When to Archive Employee Data

Overview
You can archive only terminated employee records that meet certain criteria.

Guidelines
You can archive the data of employees that meet the following requirements:
- The employee’s status is terminated, retired, or deceased.
- The employee does not have any direct reports.
- The employee is terminated in Time & Attendance, when applicable.
- The employee does not have active benefits, pending workflow events, or effective-dated pending transactions.
- The employee does not have pending updates related to payroll, third-party sick pay, or manual checks.
**Activity: Archiving Employee Data**

**Scenario**

Tyronne Diggs is a terminated employee whose data you need to archive so his name is not displayed when you process an employee search.

**Instructions**

Starting Point: Process > HR > Archive Employee

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Click the **Ready for Archive** tab.  
**Result:** The list of employees that are eligible to archive is displayed. |
| 2    | Select the check box next to **Tyronne DiggsX**, where X represents the last letter of your user name, as shown in the upper right corner of the application. |
| 3    | Click **Archive**.  
**Result:** The Confirm Action window opens. |
| 4    | Click **Yes**.  
**Result:** Tyronne Diggs's record is archived and is moved to the Archived tab. |

**Important Information**

Annual reporting requires the use of historical records, making it important to archive employee records rather than delete them. When you delete employee records, you lose most, if not all, data that is associated with the employee.
Running Standard Reports to Verify Changes

Overview

Standard reports are predefined, highly formatted output reports that you can create and run at any time during the payroll cycle.

Explore: Standard Reports

You can access a wide variety of reports from the Standard Reports page. The following illustration is an example of this page.

Elements and Descriptions

The following table describes elements found on the Standard Reports page.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output tab</td>
<td>On this tab, you can access all report output (standard, My Report, custom).</td>
</tr>
<tr>
<td>Standard tab</td>
<td>On this tab, you can view the library of predefined standard reports. When you create a standard report, you can select your own runtime and sort parameters, filter employees, and select an output type.</td>
</tr>
<tr>
<td>My Reports tab</td>
<td>On this tab, you can view a My Report, which is a copy of a standard or team report with your saved parameters that you can rerun when needed.</td>
</tr>
<tr>
<td>Filter section</td>
<td>You can filter the report output by options such as report type and category.</td>
</tr>
</tbody>
</table>
Running the Employee Payroll Changes Report Job Aid

Scenario
You want to see all of the employee changes that were entered during the current pay period.

Instructions
Starting Point: Reports > Standard Reports > All Reports

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the list of report types, select <strong>Personal &amp; Employment</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>In the <strong>Report Name</strong> column, click <strong>Employee Payroll Changes</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>Select the desired report options.</td>
</tr>
</tbody>
</table>
| 4    | Scroll down and click **Run**.  
**Result:** The report status on the Output page is Processing. |
| 5    | When the processing is complete, in the row for the report, click ✗ (action) and select the desired output option. |

Tips

- The date in the Change Date field can differ from the effective date. For example, you can make a change today and specify that it becomes effective in the future.
- You can save your own standard report, including the settings that you like to use, on the My Reports tab.

Additional Resource
For more information about standard reports and My Reports, refer to online Help.
## Knowledge Check

1. Which types of information could be included in a new hire, termination, or leave template? (Select all that apply.)
   a. The required and optional fields
   b. A list of users who will participate in entering new hires
   c. The approval process
   d. The ability to add multiple positions

2. Which of the following scenarios require changing an employee's status? (Select all that apply.)
   a. Mark is a file clerk who is now temporarily working in the mailroom.
   b. Sarah is taking a 12-week family medical leave effective tomorrow.
   c. Amanda has been promoted and is moving from Ohio to Chicago.
   d. John has taken another position and is leaving the company.

3. Which of the following scenarios requires adding another position for an employee?
   a. Jack was promoted and will be working in a new position at another location.
   b. Dawn is a nurse for Lake Mary Assisted Living and will now also work as a nurse for the Sanford Assisted Living branch of the company, which has a different federal tax identification number.
   c. Charles has accepted an offer for a new customer service representative position.
   d. Laurie works for a defense contractor and her time is allocated as 10 hours per week to the Air Force project and 30 hours per week to the Navy project.

4. What is the name and location of the report that will help you verify employee changes entered during the current pay cycle?
   a. The Audit Trail report accessed from the Standard tab
   b. The Employee Payroll Changes report accessed from the Standard tab
   c. The Employee Payroll Changes report accessed from the Custom tab
   d. The Earnings report accessed from the Sample tab
Course Closing

How to Access Support Job Aid
ADP provides various resources to help you perform your tasks after class.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>At the top of any page, click 🎨 (support).</td>
</tr>
</tbody>
</table>
| 2    | In the **Search** field, enter a topic and then click 🔍 (search).  
**Result:** The available online Help and training are displayed. |
| 3    | Review the available resources.  
| If You Want To | Then |
| Read online Help | Click the **Documentation** tab and select a topic |
| Access a learning byte | In the **Learning Resources** section, click **Just-in-Time Learning** |
| 4    | To close the Support page, click **Back**. |

How to Access TheBridge.adp.com Job Aid
Join TheBridge.adp.com, an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | If You Are  
| Logged on to ADP Workforce Now | At the top of any page, click 🇺🇸 (The Bridge) |
| Not logged on to ADP Workforce Now | 1. Access [thebridge.adp.com/welcome](http://thebridge.adp.com/welcome)  
2. Log on using your ADP Workforce Now user name and password |
Continuing Education Credits

ADP is an approved provider of recertification credit hours (RCHs) by the American Payroll Association (APA) and continuing professional education (CPE) credits by the National Association of State Boards of Accountancy (NASBA), and is an authorized provider by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102. Most ADP courses are eligible for RCHs, CPE credits, and continuing education units (CEUs).

RCHs, CPE credits, and CEUs provide recognition for updating or broadening professional competencies and may be used to maintain certifications such as the Certified Payroll Professional (CPP) and Certified Public Accountant (CPA). Professional organizations establish their own certification procedures, which are subject to change.

Professional organizations often require documentation of class objectives, agenda, and duration, along with a certificate of completion. This information is provided at the end of your handout manual. At your request, your instructor will provide you with a certificate of completion at the end of this class.
Training Evaluation

Please take a moment to complete the evaluation.
Maintaining Employee Information for ADP Workforce Now (80861)

Program Content

Required for HR practitioners; optional for Payroll practitioners: This course prepares participants to use ADP Workforce Now® to establish and maintain employee records due to changes in job-related information and employee status.

Objectives

Upon completing this course, participants will be prepared to do the following:

- Hire or rehire an employee.
- Change employee data.
- Terminate an employee.
- Add another position for an employee.
- Archive employee data.
- Run a standard report to verify changes.

Audience

This course is intended for those who need to establish and maintain employee records.

Prerequisites

Before beginning this course, participants should have a working knowledge of personal computers, Microsoft® Windows®, and Internet navigation.

Advance Preparation

None

Participant Materials

Participants need to print the Maintaining Employee Information for ADP Workforce Now handout manual prior to attending class.

Method of Presentation

Instructor-led training (ILT), Group: Live
Virtual class (VC), Group: Internet-based

Duration

2 hours
Continuing Education Credits

This course may be eligible for the following recertification credit hours (RCHs), continuing professional education (CPE) credits, and continuing education units (CEUs):

**RCH:** 2.0  
**CPE:** 2.0  
**CEU:** 0.2

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted on a 50-minute hour.

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ADP, LLC, Major Account Services, Learning and Performance, has been accredited as an authorized provider by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102; (703) 506-3275.

In accordance with the American Payroll Association (APA), recertification credit hours (RCHs) apply to Certified Payroll Professional (CPP) and Fundamental Payroll Certification (FPC) credentials.

**Recommended Field of Study (NASBA)**

Specialized Knowledge and Applications

**Cost and Training Policy**

For information on course cost, registration, and cancellation policies, refer to the [Training Policy](#).

**Learner Records and Privacy Policy**

Learner records are available on Learn@ADP within 24 hours after participants complete their training classes. To access learner records, refer to these [instructions](#).

View ADP's [Privacy Policy](#) on Learn@ADP.