ADP Workforce Now

What’s New in Company and Employee Maintenance

Handout Manual
Welcome to…

What’s New in Company and Employee Maintenance for ADP Workforce Now
Audio

• You should be hearing the audio through your computer.
• If you do not have sound, check the volume settings.
• If difficulties continue, try pressing F5 to refresh your screen.
• You can also try switching your Internet browser to another browser, such as Mozilla Firefox or Google Chrome.
Questions and Answers

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The session will start shortly. The audio will be delivered through your computer speakers. Please be sure your volume is turned up. In order to participate in the class exercises, please print the Handout Manual found in your Welcome email.

Enter a Question

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Resource List

ADP Workforce Now

Q&A

Slides

ATTENTION:
The session will start shortly. The audio will be delivered through speakers. Please be sure your volume is turned up. In order to move forward, please refresh now.

Enter a Question

Resource List

READ THIS FIRST FAQ

Handout Manual

Media Player

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Maximize Your Screen

Welcome to...

Your ADP Training
Course Agenda

• People and Process Menus
• File Number, Position ID, and Associate ID
• New Hire Enhancements
• Deleting Employees
• Status Changes
People and Process Menus

Overview
In this topic, we will discuss the following:
• ADP Workforce Now Home page
• People menu
• Personal Profile page
• Process menu
Common Time & Attendance Tasks

My Time

My Time Off

As of today

REQUEST TIME OFF

TIME OFF POLICY BALANCE REQUESTS PENDING REQUESTS SCHEDULED

There are no records found

* Balance /Request Amount: D (Days); H (Hours)
* The balances include future transactions.

Forms

- State Tax Forms
- Benefits Forms

Click here to access the full Forms Library

ADP News

Company Events

Making A Difference In Our Communities

Since the launch of our Volunteer Paid Time Off program, our office completed three large group projects and several smaller ones during a “Make a Difference Day” event. The team also committed to two-year-round projects - Adopt-A-Park and Adopt-A-Trail. In the past six months, one third of all team members have volunteered to make a difference in their communities and engage in team-building.

If you or your team have found ways to give back to the community through the use of our Volunteer Paid Time Off Program, please send your stories to the team.

We are all responsible to the world around us so keep these stories AND photos coming!
What Do You Think? Menu Options

Which menu would you select to access information about an employee’s pay rate, benefits, employment profile, and performance review?

a. People
b. Process
Common Time & Attendance

My Time
Monday, Mar 07, 20XX, 03:33 PM

No Activities

REQUEST TIME OFF

TIME OFF POLICY BALANCE REQUESTS PENDING REQUESTS SCHEDULED

There are no records found

* Balance /Request Amount: D (Days); H (Hours)
* The balances include future transactions.

Forms

• State Tax Forms
• Benefits Forms

ADP News

We are all responsible to the world around us so keep these stories AND photos coming!
## Personal Profile

**Name:** Margaret Albany

**Tax ID (SSN):** XXX-XX-XXXX

**Position ID:** F5R000065

**Hire Date:** 05/05/20XX

**Status:** Active

### Contact

- **Personal Email:** margaret.albany@geneva.com
- **Work Phone:** (XXX)XXX-XXXX

### Tax ID

- **United States Social Security Number (SSN):** XXX-XX-XXXX

### Emergency Contacts

- **Contact:**
- **Doctor:**
- **Hospital:**
- **Phone Number:**

### Demographics

- **Birth Date:** XXXX/XXXXX
- **Age:** XX
- **Years:** XX
- **Months:**
- **Marital Status:** Single
- **Gender:** Female
- **Marital Effective Date:**
- **Tobacco User:** Not Specified
- **Race ID Method:**
- **EEO Ethnic Code:** White
- **Medicare:** Not Specified

### Addresses

- **Primary Address:** 435 Kenmore Ave
  Grand Rapids, MI 49546
  United States
- **Secondary Address:**
- **Works From Home:** No

### Custom Fields

- **None**
What Do You Think? Menu Options

Which menu would you select to access company activities, such as payroll, hiring, and transferring employees?

a. People
b. Process
File Number, Position ID, and Associate ID

Overview
In this topic, we will discuss the differences between file number, position ID, and associate ID.
What Numbers Are the Same?

- File number
- Department
- Job number

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Purpose</th>
<th>Method of Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>File number</td>
<td>To pay employees and store permanent and year-to-date information that is displayed on Forms W-2 at the end of the year</td>
<td>Automatically or manually generated, depending on your company’s setting selections</td>
</tr>
<tr>
<td>Example: 000149</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What Numbers Have Been Added?

- Associate ID

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Purpose</th>
<th>Method of Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate ID</td>
<td>• To identify a specific employee within ADP Workforce Now Payroll</td>
<td>Automatically generated when you enter a new hire in the New Hire wizard or on import</td>
</tr>
<tr>
<td>Example: 0000000072</td>
<td>• Cannot be reused or assigned to another employee</td>
<td></td>
</tr>
</tbody>
</table>
What Numbers Have Been Added? *(cont.)*

- Associate ID
- Position ID

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Purpose</th>
<th>Method of Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate ID</td>
<td>• To identify a specific employee within ADP Workforce Now Payroll</td>
<td>Automatically generated when you enter a new hire in the New Hire wizard or on import</td>
</tr>
<tr>
<td></td>
<td>• Cannot be reused or assigned to another employee</td>
<td></td>
</tr>
<tr>
<td>Example: 0000000072</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position ID</td>
<td>• To identify an employee’s paid and nonpaid positions</td>
<td>Automatically generated when you use the New Hire or Add Another Position wizards, or on import</td>
</tr>
<tr>
<td>(company code +</td>
<td>Note: An “N” as the last character indicates that the employee is not</td>
<td></td>
</tr>
<tr>
<td>file number)</td>
<td>paid through ADP Workforce Now Payroll.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• To assign different employee positions to different managers</td>
<td></td>
</tr>
<tr>
<td>Examples: YNM000149, 37C13579N</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What Do You Think? Employee Profile Page

How do you think that you access the Employment Profile page?

a. People > Personal Information
b. People > Employment
c. Process > HR
# Employment Profile

**Benton, Angelo**  
SF-AD - Account Developer - SF  
Home Department: 008000 - Sales

<table>
<thead>
<tr>
<th>Position</th>
<th>Status</th>
<th>Regular Pay</th>
<th>Additional Earnings</th>
<th>Work Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Developer - SF</td>
<td>Reports To East, Donald</td>
<td><strong>Active</strong></td>
<td><strong>$1,846.15</strong></td>
<td><strong>Show Active Only</strong></td>
</tr>
<tr>
<td>4/1/20XX</td>
<td>Tax ID (SSN) XXX-XX-XXXX</td>
<td>Hire Date May 4, 2000</td>
<td>Annual Salary $47,999.90</td>
<td>FTE Blackout Calendar</td>
</tr>
<tr>
<td>Job Function Pay Grade</td>
<td>Position ID F5Q000149</td>
<td>Leave Return Date</td>
<td>Rate 2 (More Rates)</td>
<td>Assigned Shift Default Request Hours</td>
</tr>
<tr>
<td>Job Change Reason DBLOAD</td>
<td>Management Position No</td>
<td>Leave Return Reason</td>
<td>Use FLSA Overtime No</td>
<td>Tipped Employee No</td>
</tr>
<tr>
<td>Job Class</td>
<td>Worked in Country USA - United States</td>
<td>Hire Reason</td>
<td>Cancel Automatic Pay No</td>
<td>None</td>
</tr>
<tr>
<td>FL SA</td>
<td>Company Code F5Q</td>
<td>Supporting Documents</td>
<td>Change Reason DBLoad</td>
<td>None</td>
</tr>
<tr>
<td>NAICS Workers' Comp</td>
<td>File Number 000149</td>
<td>Additional Earnings</td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>EEOC Job Classification</td>
<td>Assignment ID</td>
<td>Regular Pay</td>
<td>Additional Earnings</td>
<td>Work Schedule</td>
</tr>
</tbody>
</table>
## Employment Profile

**Benton, Angelo**

**Position:** This employee has more than one position.

### Accounts Developer - SF
- **Management Position:** No
- **Job Function:** Pay Grade
- **Job Change Reason:** DBLOAD
- **Job Class:** Position ID F5Q000149
- **FLSA:** No
- **NAICS Workers' Comp:** File Number 000149
- **EEOC Job Classification:** Assignment ID
- **Officer/Owner:** None

### Additional Earnings
- **Show Active Only:** None

### Work Schedule
- **FTE:**
- **Blackout Calendar:**

---

**Tax ID (SSN):** XXX-XX-XXXX
**Position ID:** F5Q000149 (Primary) Active
**Hire Date:** 05/04/20XX
**Status:** Active

**Regular Pay:**
- **Salary:** $1,846.15
- **Pay Frequency:** Biweekly
- **Annual Salary:** $47,999.90
- **Rate 2 (More Rates):**
  - **Premium Rate Factors:** 1.5 * 1.0
  - **Use FLSA Overtime:** No
  - **Cancel Automatic Pay:** No
  - **Tipped Employee:** No

---

**Other Positions:**
- **APCLRK - Accounts Payable Clerk**
  - **Position ID:** F5Q000149
  - **Status:** Active
- **CHANGE PRIMARY POSITION**
Employment Profile

Angelo Benton
Account Developer - SF

Associate ID: VZYJLD5O
Active

kbenton@geneva.com
XXX-XXX-XXXX
Department
Sales
Location
Atlanta
Reports to
Donald East

Additional Earnings
Show Active Only
None

Work Schedule
What Do You Think? Employee Identification

Which number is used to identify whether an employee has paid or non-paid positions in your company?

a. File number
b. Position ID
c. Associate ID
Changing Employee Job Information
- Adding Another Position for an Employee
- Changing an Employee's Job
- Entering a Salary Change
- Transferring an Employee

Changing Employee Status
- Placing an Employee on Leave
- Terminating an Employee
- Archiving an Employee

Working with Multiple Employee Records
- Initiating a Mass Change
- Searching for Employees

Changing Pay Information
- Converting a Non-Paid Employee to a Paid Employee

Changing Time & Attendance Information
- Converting a Non-Time-Tracking Employee to a Time-Tracking Employee
- Turning Off Time-Tracking for a Position
New Hire Enhancements

Overview
In this topic, we will discuss the following:
• New fields in the new hire templates
• Accessing the New Hire wizard
• Additional fields and functionality in the New Hire wizard
Manage New Hire Templates

ADP provides standard New Hire templates. You can copy standard templates and edit them as needed, or create custom templates to reflect your new hire process.

<table>
<thead>
<tr>
<th>TEMPLATE NAME</th>
<th>COUNTRY</th>
<th>ACTIVATED?</th>
<th>CREATION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR + Payroll (System)</td>
<td>US</td>
<td>Yes</td>
<td>2/5/20XX</td>
</tr>
<tr>
<td>HR + Payroll + Time (System)</td>
<td>US</td>
<td>Yes</td>
<td>2/5/20XX</td>
</tr>
<tr>
<td>HR + Time (System)</td>
<td>US</td>
<td>Yes</td>
<td>2/5/20XX</td>
</tr>
<tr>
<td>HR Only (System)</td>
<td>US</td>
<td>Yes</td>
<td>2/5/20XX</td>
</tr>
<tr>
<td>International (System)</td>
<td>Interna...</td>
<td>Yes</td>
<td>2/5/20XX</td>
</tr>
</tbody>
</table>
Hire/Re-Hire

Name Template

Select Steps
Select Fields
Order Steps
Assign Users
Set Notifications
Confirm Selections

Name the New Hire template and answer the following questions to customize the workflow.

Template Name*

Where will employees hired with this template work?

How will employees hired with this template be paid?

- ADP Workforce Now Payroll
- Other Payroll Provider

Will employees hired with this template track time through ADP Workforce Now Time & Attendance?

- Yes
- No

How many people will enter new hire information?

- One person
- Two or more people

Do you want to require final approval for new hires created with this template?

- Yes, require approval
- No, do not require approval

CANCEL
PREVIOUS
NEXT
DONE
Hire/Rehire

Select a work location
- United States (US)
- International (INT)

Select a Template
- Quick Hire
- Quick Hire + Time
- HR + Payroll (System)
- HR + Payroll + Time (System)
- HR + Time (System)
- HR Only (System)
Important Notes about the Quick Hire Template

- Map the health care eligibility date *before* you enter information into the template.
- Quick Hire does not provide the ability to send notifications to employees or practitioners.
- Administrators can control practitioners’ access to Quick Hire using a new security permission.
What Do You Think? Hiring an Employee

Which would you do first when you need to hire an employee?

a. Select or customize a template.

b. Use the New Hire wizard.
Deleting Employees

Overview
In this topic, we will discuss deleting new hires.
Status Changes

Overview
In this topic, we will discuss the following:
• Viewing an employee’s status information
• Changing an employee’s status
• Managing and customizing status change templates
• Using the Status Change wizards
What Do You Think? Employee Status

Which page shows us the employee’s status?

a. Personal Profile
b. Employment Profile
c. Employee Profile
### Employment Profile

**Barbato, Samuel**
- **Position:** MGR - Manager
- **Tax ID (SSN):** XXX-XX-XXXX
- **Position ID:** F5Q000177
- **Hire Date:** 04/01/20XX
- **Status:** Leave

#### Position
- **Manager:** Reports To Dexter, John
- **Position Start Date:** 4/1/20XX
- **Job Function:**
- **Job Change Reason:** New Hire
- **Job Class:**
- **FLSA:**
- **NAICS Workers’ Comp:**
- **EEOC Job Classification:**
- **Officer/Owner:**

#### Status
- **Leave:**
  - **Leave Start Date:** 3/5/20XX
  - **Expected Return Date:** 3/14/20XX
  - **Leave Reason:** Education

#### Regular Pay
- **Regular Pay:** $13.4520
- **Pay Frequency:** Biweekly
- **Annual Salary:** $27,980.16
- **Rate 2 (More Rates):** 15.00
- **Premium Rate Factors:** 1.0
- **Use FLSA Overtime:** No
- **Cancel Automatic Pay:** No
- **Tipped Employee:** No

#### Supporting Documents

#### Additional Earnings
- **Show Active Only:**

#### Work Schedule
- **FTE:**
- **Blackout Calendar:** Not Assigned
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/06/20XX</td>
<td>Period Ending</td>
</tr>
<tr>
<td>04/01/20XX</td>
<td></td>
</tr>
<tr>
<td>05/05/20XX</td>
<td></td>
</tr>
</tbody>
</table>

**Albany, Margaret**

**Job Title**: OFFMGR - Office Manager

**Position ID**: F5R000065

**Status**: Active

**Effective**: 01/2015 - Onward (Current)

**Change will be effective**: mm/dd/yyyy

**Hire Date**: May 5, 20XX

**Years of Service**: 7 years, 9 months

**Status**: Active

**Worker Category**: FARG - Regular Full-time

**Rehire Date**: mm/dd/yyyy

**Rehire Reason**: 

**Leave Return Date**: mm/dd/yyyy

**Leave Return Reason**: 

**Supporting Documents**

- **CANCEL**
- **DONE**
Status Change Templates

Two status change templates are available:

• Termination
• Place on Leave
What Do You Think? Accessing the Templates

Which menu provides access to the templates?

a. Personal
b. Process
c. Setup
Common Time & Attendance Tasks

My Time

Monday, Mar 07, 20XX, 03:33 PM

- MY TIMECARD
- ANNUAL SUMMARY

No Activities

My Time Off

As of today

REQUEST TIME OFF

- TIME OFF
- BALANCE
- REQUEST

There are no records found

- Balance /Request Amount: D (Days); H (Hours)
- The balances include future transactions.

Forms

- State Tax Forms
- Benefits Forms

Click here to access the full Forms Library

Template Management

Hire/Re-Hire

Status Changes

ADP News

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ADP

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# Manage Status Change Templates

ADP provides standard status change templates. You can copy standard templates and edit them as needed, or create custom templates to reflect your process.

<table>
<thead>
<tr>
<th>TEMPLATE NAME</th>
<th>COUNTRY</th>
<th>TEMPLATE TYPE</th>
<th>ACTIVATED?</th>
<th>CREATION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave (System)</td>
<td>US</td>
<td>Leave of Absence</td>
<td>Yes</td>
<td>2/5/2016</td>
</tr>
<tr>
<td>Termination (System)</td>
<td>US</td>
<td>Termination</td>
<td>Yes</td>
<td>2/5/2016</td>
</tr>
</tbody>
</table>
What Do You Think? Termination Wizard

Which menu would you select to terminate an employee using the Termination wizard?

a. Personal
b. Process
c. Setup
What Do You Think? Terminating an Employee

When an employee leaves after just one pay period, which of the following do you use?

a. Delete Employees activity
b. Termination wizard
What Do You Think? Deleting an Employee

When a new hire does not start, which of the following do you use?

a. Delete Employees activity
b. Termination wizard
What Do You Think? Associate ID

Which of the following describes the purpose of the associate ID?

a. Is used to pay employees
b. Uniquely identifies an employee’s position
c. Identifies an employee within ADP Workforce Now
What Do You Think? Menu Options

Which menu would you select to hire an employee?

a. People
b. Process
c. Setup
What Other Resources Are Available?
## Additional Resources

<table>
<thead>
<tr>
<th>Resource</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintaining Employee Information for ADP Workforce Now</td>
<td>Courses on <a href="mailto:Learn@adp.com">Learn@adp.com</a></td>
</tr>
<tr>
<td>Creating New Hire and Status Change Templates in ADP Workforce Now</td>
<td></td>
</tr>
<tr>
<td>Learning Bytes</td>
<td>Support &gt; Learning Resources &gt; Just-in-Time Learning &gt; Payroll and General Administration &gt; Maintaining Employee Information</td>
</tr>
<tr>
<td>Online Help</td>
<td>Click 📚 (help) on any page.</td>
</tr>
</tbody>
</table>
Access The Bridge

TheBridge.adp.com

Company Mission

Our Mission

Our company is dedicated to maximize the potential of our greatest asset: our employees. We embrace change and the opportunity it brings. We are focused on delivering quality customer service, and are committed to recruit, develop, reward and retain our global workforce.

Company News and Announcements

Record earnings for fourth consecutive quarter! Click here to read more.

Quick Links

- Pay Statement
- Company Policies

Company Spotlight

Mary Smith had record sales for the month of May. Congratulations Mary! Click here to see all sales results for the month.

Forms

- State Tax Forms
- Benefits Forms
Click here to access the full Forms Library

Company Events

Making A Difference In Our Communities

Since the launch of our Volunteer Paid Time Off program, our office completed three large group projects and several smaller ones during a “Make a Difference Day” event. The team also committed to two year round projects – Adopt-A-Park and Adopt-A-Trail. In the past six months, one third of all team members have volunteered to make a difference in their communities and engage in team-building.

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Course Closing

Objectives
Now that you have completed this webinar, you are prepared to do the following:
• Correctly use the People and Process menus.
• Distinguish between file number, position ID, and associate ID.
• Hire new employees.
• Delete employees.
• View and make status changes.
Thank You!

It was my pleasure to work with you today!