# **Personnel**



**User's Manual** 

## **Personnel**

Health District Information System HDIS (Windows Ver. 4.0)

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CHC Software, Inc.
Health District Information Systems helpdesk@hdis.org

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### Introduction

This program is designed to assist you in organizing a systematic approach to entering your personnel and provides accurate up-to-date records within your health department.

Please review the manual carefully to obtain the maximum benefits. Little or no prior computer experience is necessary to operate this program.

### **About This Manual**

The Personnel Module is simple to use. The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first record in your computer.

Square boxes in this manual surr	ound the key	that you are to press on your keyboard.
As an example, when you read	ENTER	, press the <b>enter</b> key on your keyboard.
The word		

**TYPE** is followed by bracketed [ ] instructions of what to type into a field.

Note: For Technical Support, email: helpdesk@hdis.org



## **Navigation**

Whenever you see one



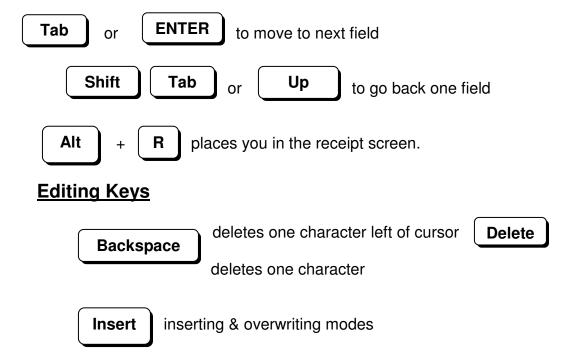
click the left side of your mouse once.

Whenever you see two



click the left side of your mouse twice.

### **Navigation Keys For Entering Information**



When you see a pull-down field, click the arrow to the right to view all your choices.



## Starting HDIS

### **MICROSOFT Windows Users**

Start

**Programs** 

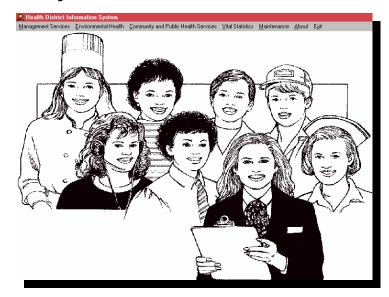
**Health District Info Systems** 

**HDIS** 

## **Health District Information System Menu Bar**

### **HDIS (Health District Information System)**

has several different modules designed to assist your health district in its day-to-day operations. The **Personnel Module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.





### **Management Services**

#### Personnel

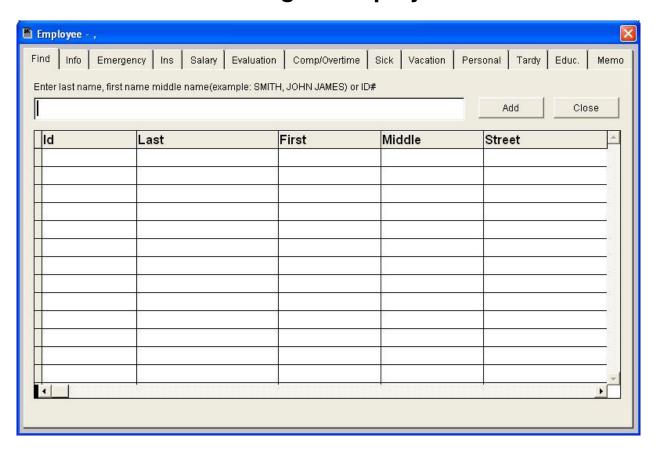




#### Personnel



## Finding an Employee

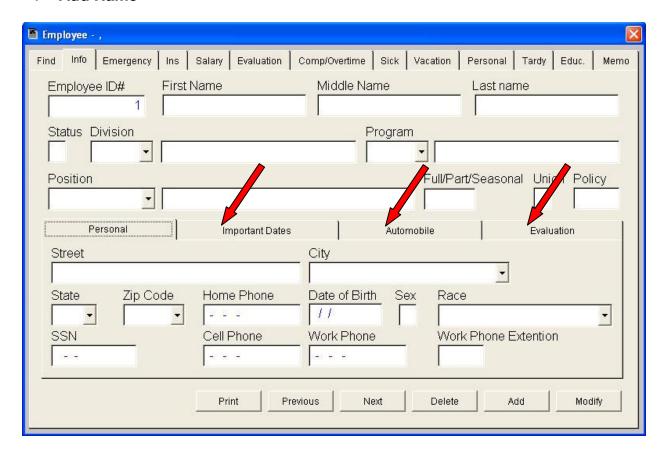


To find an employee, enter the name (**last, first, middle**) and press the "**Enter**" key. The program will automatically find the name in the database if present. If the employee's name is not in the list, you will then enter it in the database.

Radio Button	Description
Add Name	Click to add a new employee
Close	Click to exit



#### **Add Name**



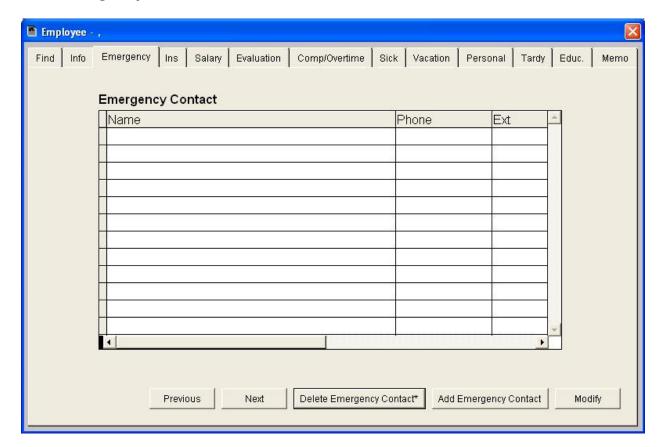
The "**Info**" page is for entering general information for the employee. Be sure not to overlook the additional tabs (**Important Dates, Automobile,** and **Evaluation**).

Field/Button	Description
Print	Click to open the Print window
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Delete	Click to delete the employee's record
Add TB Record	Click to add an employee
Modify Button	Click to modify the record

# **Emergency**



## Emergency



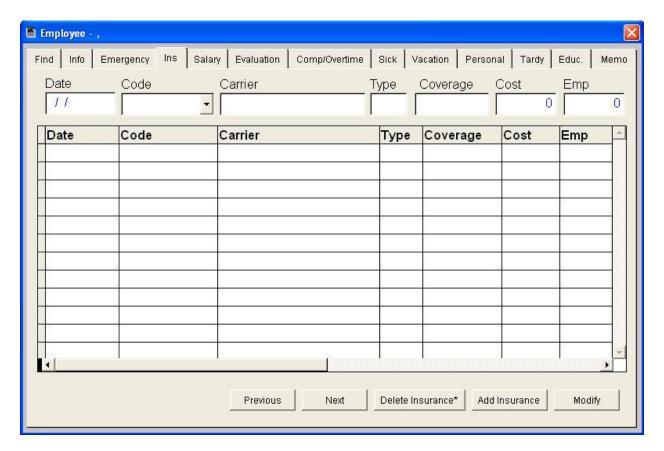
To enter emergency contacts for the employee, click the "Add Emergency Contact" button.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Delete Emergency Contact*	Right-Click to delete the row from the grid
Add Emergency Contact	Click to add a row to the grid
Modify Button	Click to modify the record

## Insurance



### Insurance

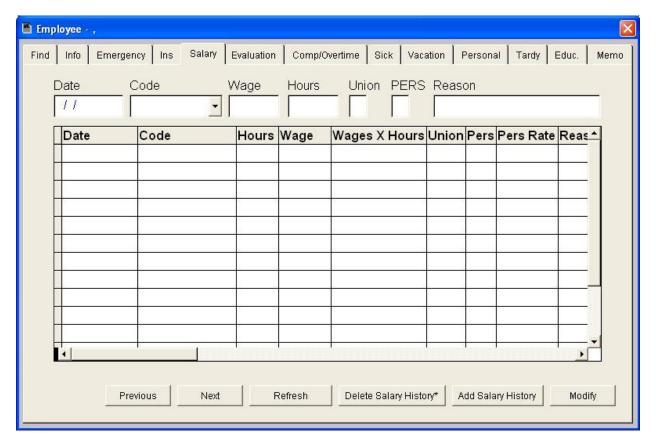


To enter insurance information for the employee, enter the information in the fields above the grid and click the "Add Insurance".

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Delete Insurance*	Right-Click to delete the row from the grid
Add Insurance	Click to add insurance information to the grid
Modify Button	Click to modify the record

# Salary





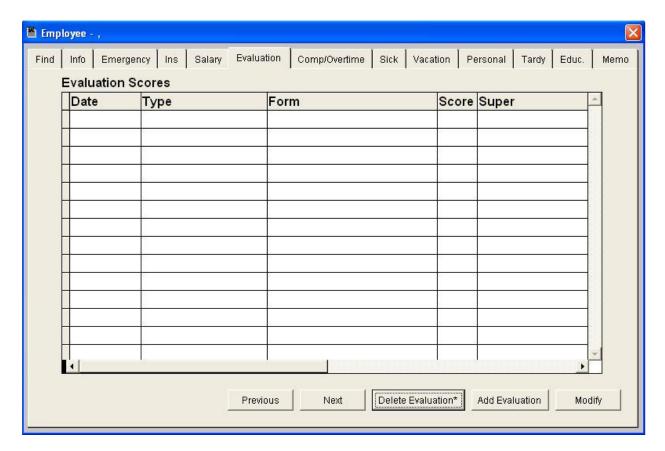
To enter salary information for the employee, enter the information in the fields above the grid and click the "Add Salary History" button.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Refresh	Click to put the information in the grid in order by date
Delete Salary History*	Right-Click to delete row form the grid
Add Salary History	Click to add salary history to the grid
Modify Button	Click to modify the record

## **Evaluation**



### Evaluation



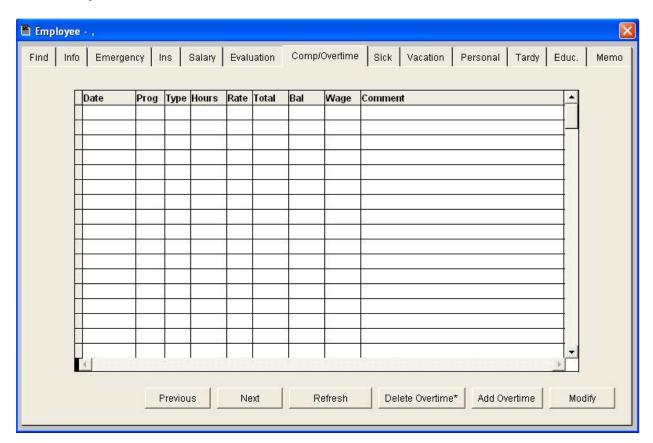
To enter evaluation scores for the employee, click the "Add Evaluation".

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Delete Evaluation*	Right-Click to delete the row from the grid
Add Evaluation	Click to add a row to the grid
Modify Button	Click to modify the record

# **Comp/Overtime**



### Comp/Overtime

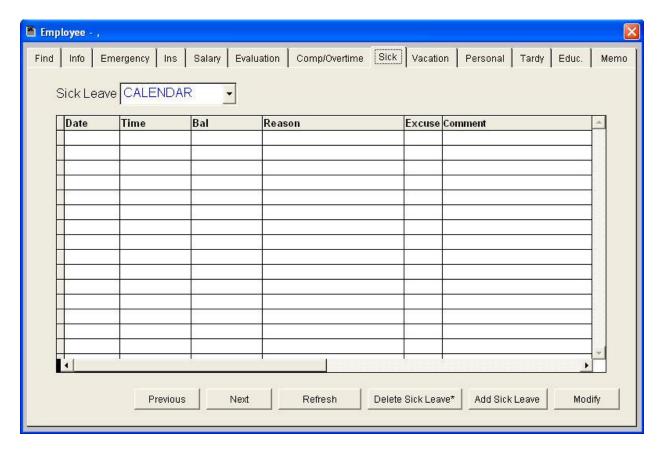


To enter comp/overtime for the employee, click the "**Add Overtime**". You may also enter a "Balance Forward" for the very first time you use the Personnel module.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Refresh	Click to put the information in the grid in order by date
Delete Overtime*	Right-Click to delete the row from the grid
Add Overtime	Click to add a row to the grid
Modify Button	Click to modify the record

### **Sick**





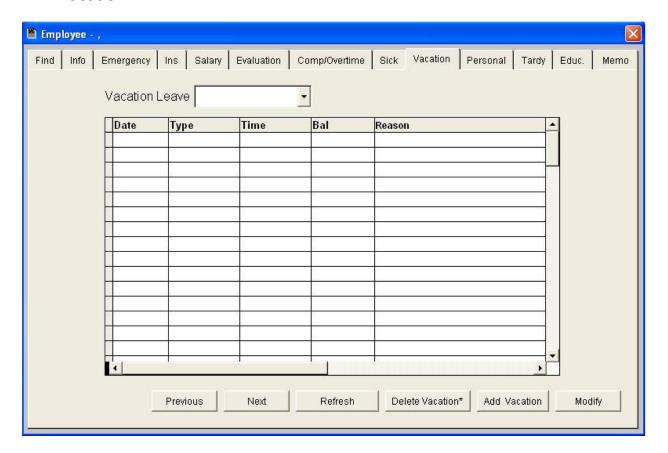
To enter sick leave for the employee, choose the type of sick leave in the dropdown and click the "**Add Sick Leave**" button. You may also enter a "Balance Forward" for the very first time you use the Personnel module.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Refresh	Click to put the information in the grid in order by date
Delete Sick Leave*	Right-Click to delete the row from the grid
Add Sick Leave	Click to add a row to the grid
Modify Button	Click to modify the record

## **Vacation**



### Vacation



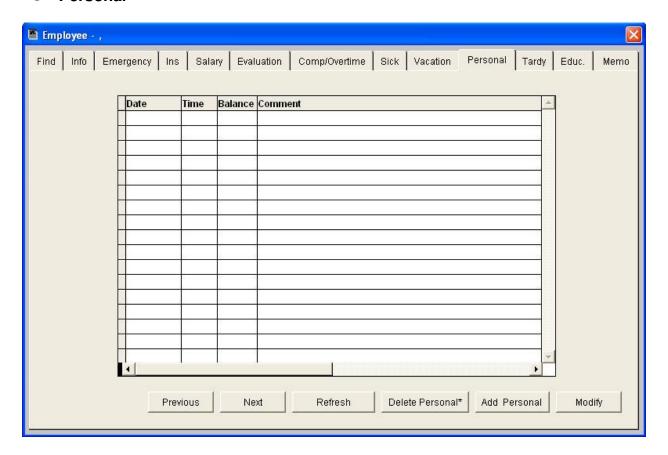
To enter vacation time for the employee, choose the type of vacation time in the dropdown and click the "**Add Vacation**" button. You may also enter a "Balance Forward" for the very first time you use the Personnel module.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Refresh	Click to put the information in the grid in order by date
Delete Vacation*	Right-Click to delete the row from the grid
Add Vacation	Click to add a row to the grid
Modify Button	Click to modify the record

## **Personal**



### Personal



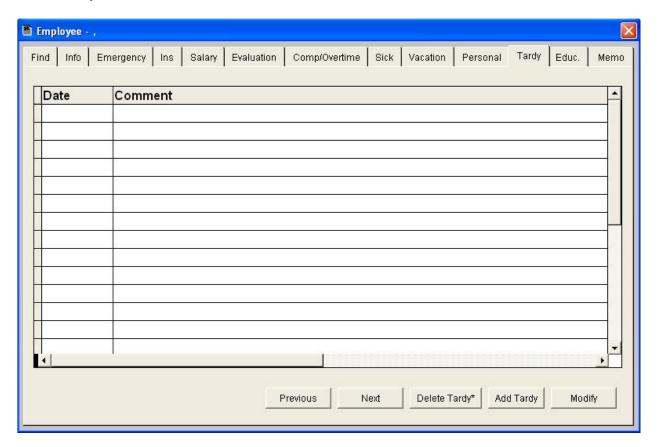
To enter personal time for the employee, click the "Add Personal". You may also enter a "Balance Forward" for the very first time you use the Personnel module.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Refresh	Click to put the information in the grid in order by date
Delete Personal*	Right-Click to delete the row from the grid
Add Personal	Click to add a row to the grid
Modify Button	Click to modify the record

# **Tardy**



## Tardy



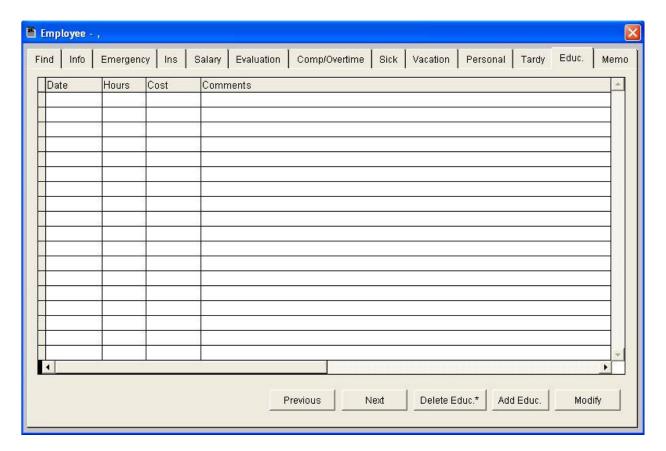
To enter tardy dates for the employee, click the "Add Tardy" button.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Delete Tardy*	Right-Click to delete the row from the grid
Add Tardy	Click to add a row to the grid
Modify Button	Click to modify the record

## **Education**



### Education



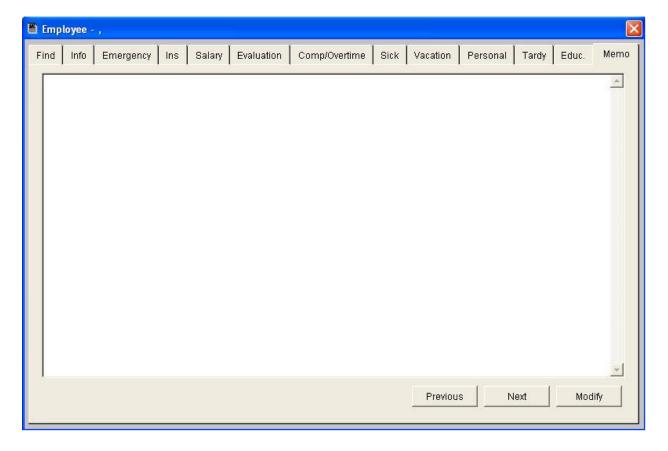
To enter education time for the employee, click the "Add Educ." button.

Field/Button	Description
Previous	Click to navigate to the previous employee
Next	Click to navigate to the next employee
Delete Educ.*	Right-Click to delete the row from the grid
Add Educ.	Click to add a row to the grid
Modify Button	Click to modify the record

## Memo



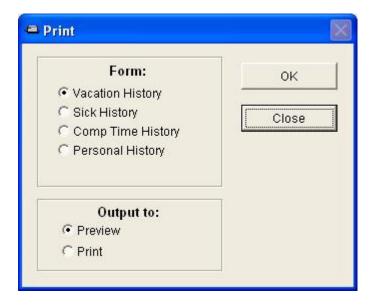
#### Memo



You can enter unlimited notes on the employee.

## **Print Button**





**Print:** The print button is available on all the window tabs. The print menu is the same, and you may print any of the options no matter what tab you have open at the time.

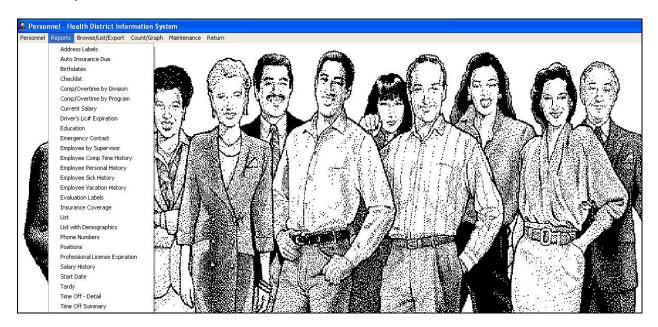
## **Print Options**

Field/Button	Description
Vacation History	Prints the selected employee's vacation history.
Sick History	Prints the selected employee's sick time history.
Comp History	Prints the selected employee's comp time history.
Personal History	Prints the selected employee's personal time history.
Print	Prints the report
Preview	Previews the report

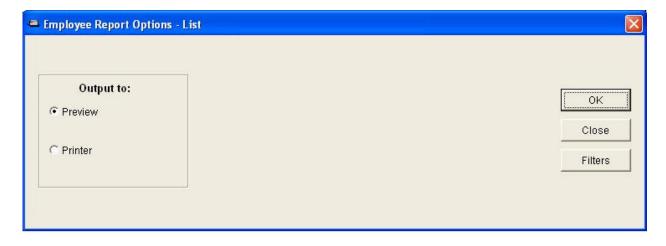
## **Reports**



## Reports



The reports menu contains a list of the many reports that you are able to obtain from the program.



For each report, an option box will appear similar to the one shown above. It enables you to enter dates for your reports as well as use of filters.

# **Personnel Reports**

Reports	Description
Address Labels	Creates address labels, by employee
Auto Insurance Due	List, by employee, when their auto insurance is due.
Birthdates	Lists birthdays of employees alphabetically including the
	program in which they are involved.
Checklist	Alphabetical list of employees and the days the week in a
	table format.
Comp/Overtime by Division	List of employee comp/overtime by division.
Comp/Overtime by Program	List of employee comp/overtime by program.
Current Salary	List, by employee, with their current salary.
Driver's Lic. # Expiration	Lists the date the employee's driver's license expires.
Education	List, by employee, with their education.
Emergency Contact	Alphabetical list, by employee, of emergency contact names and phone numbers.
Employee by Supervisor	Alphabetical list of employees by supervisor.
Employee Comp Time	List, by employee, the date of the comp time, if it is accrued,
History	paid or used, the program the employee is assigned to, any
	pertinent comments, the amount of actual time, the rate the
	employee is reimbursed, the amount of time the final
	calculations are based on and the balance of available time.
Employee Personal History	List, by employee, the date the time was taken or accrued, the
	number of hours, and the available balance.
Employee Sick History	List, by employee, the date sick time was taken, the reason it
	was taken, was it excused, the amount of time taken, and the
	available balance.
Employee Vacation History	List, by employee, the date of the vacation time, if it is
	accrued or used, any pertinent comments, amount of time,
	and the available balance.
Evaluation Labels	Creates labels that may be affixed to evaluation forms.
Insurance Coverage	List, by employee, of their insurance coverage.
List	Alphabetical list, by employee including occupation
List III December	information
List with Demographics	Alphabetical list, by employee with demographics.
Phone Numbers	List, by employee, with all phone numbers.
Positions	List, by employee, with position and description.
Professional Lic. Expiration	Lists of the date the employee's professional license expires.
Salary History	Provides salary history by employee.
Start Date	List, by employee, with their start date.
Tardy	List, by employee, who have recorded tardy instances.
Time Off – Detail	List, by employee (detailed), with balance of vacation time,
T: 0" 0	sick leave, comp time, and personal time.
Time Off – Summary	List, by employee (summary), with balance of vacation time,
	sick leave, comp time, and personal time.

# **Maintenance - Add/Delete/Modify Tables**



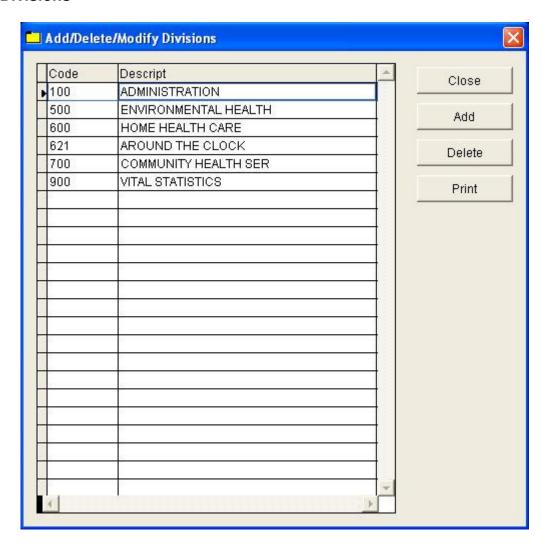
### Maintenance



The maintenance menu contains a list of tables that you can modify for your program.



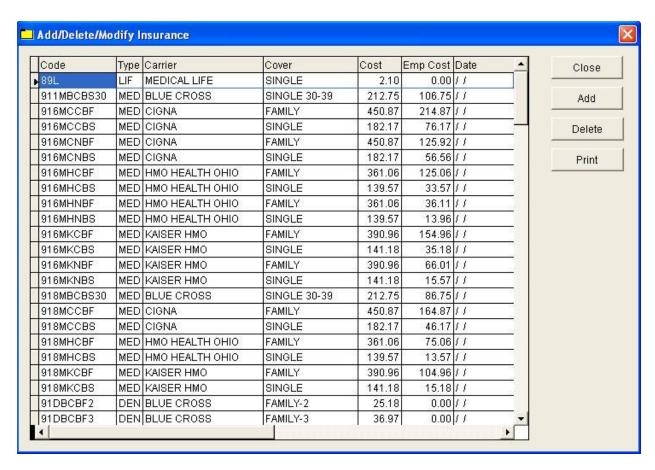
# **Divisions**



Field/Button	Description
Code	Enter the division code
Descript	Enter the description
Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list



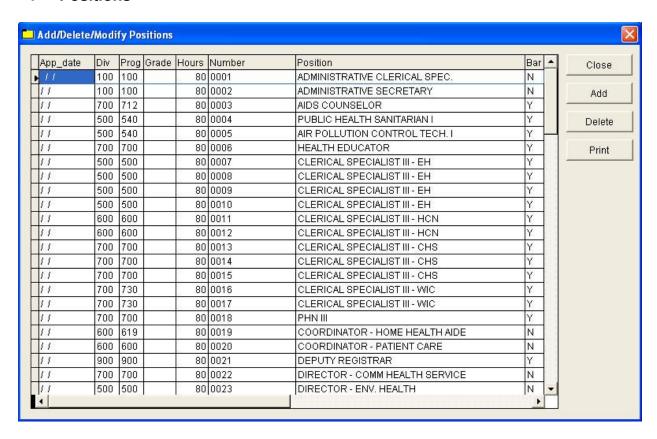
#### Insurance



Field/Button	Description
Code	Enter the insurance code
Type	Enter the type of insurance
Carrier	Enter the insurance carrier
Cover	Enter the insurance coverage
Cost	Enter the cost of the insurance
Emp. Cost	Enter the employee's cost
Date	Enter the date
Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list



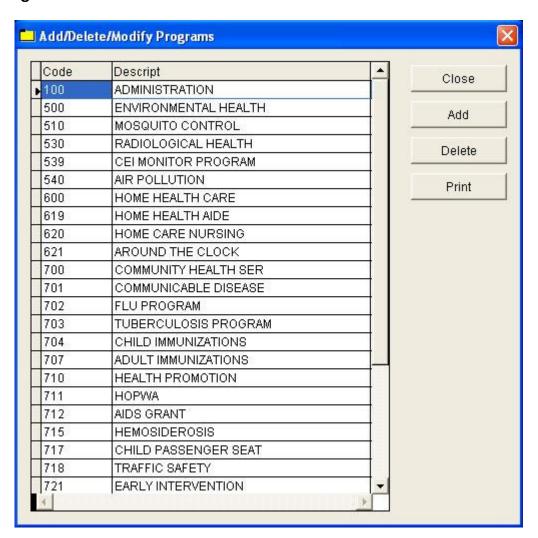
#### **Positions**



Field/Button	Description
App Date	Enter the application date
Div	Enter the division code
Program	Enter the program
Grade	Enter the grade
Hours	Enter the number of hours (two-weeks)
Number	Enter the employee's cost
Position	Enter the position
Bar	Indicates employee is involved in collective bargaining.
Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

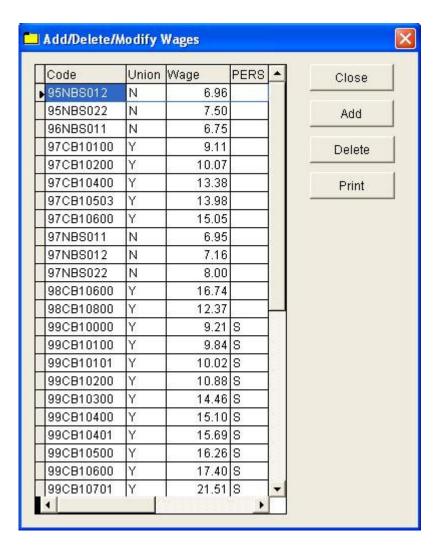


### **Programs**



Field/Button	Description
Code	Enter the code
Program	Enter the program
Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list

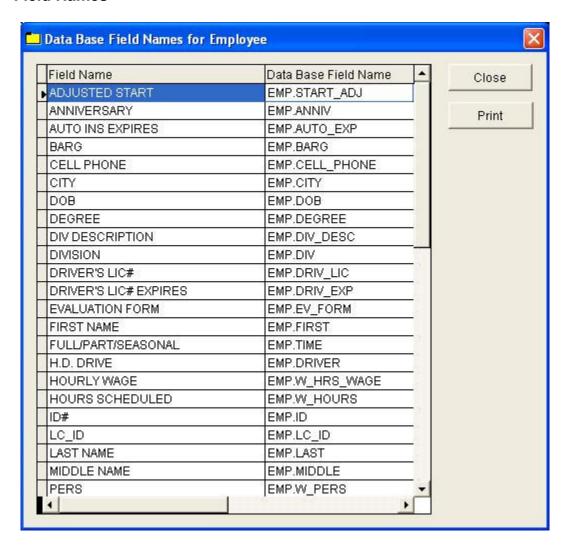




Field/Button	Description
Code	Enter the wage code
Union	"Y" = Yes, "N" = No
Wage	Enter the hourly wage
PERS	Contributes to PERS
Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list



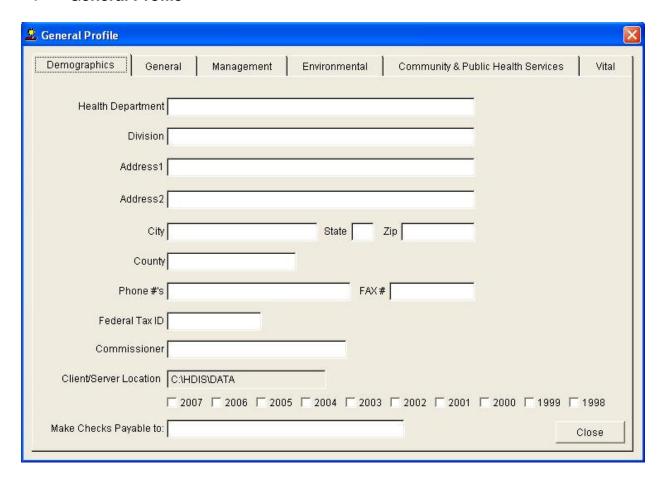
#### **Field Names**



Field names are available for programmers or for Browse/List/Export functions.



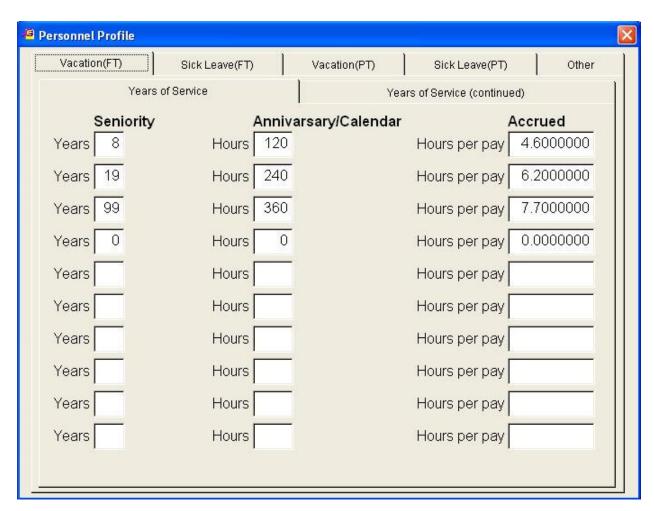
### **General Profile**



The **General Profile** enables you to enter the basic information for your health department.



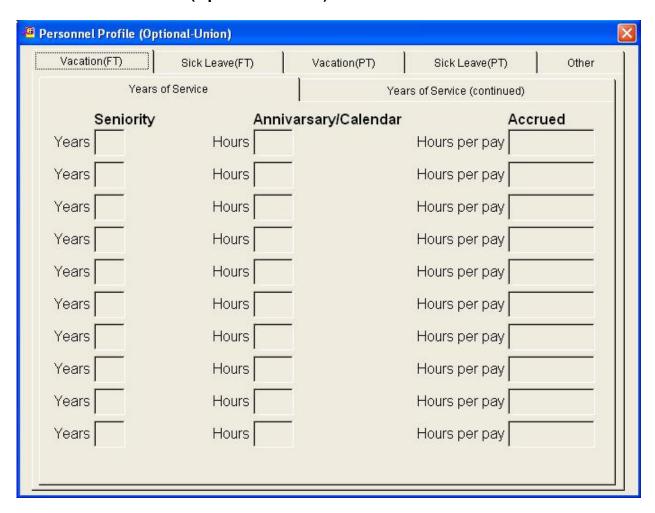
### **Personnel Profile**



Enter the intervals that determine vacation and sick leave for full and part time personnel as well as other needed parameters.



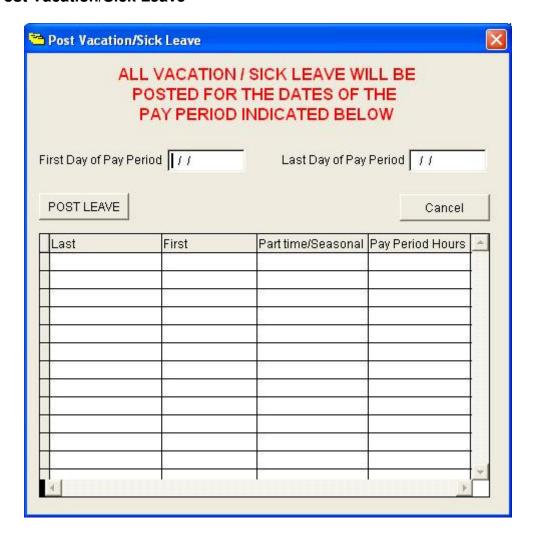
### Personnel Profile (Optional – Union)



Enter the intervals that determine vacation and sick leave for full and part time personnel as well as other needed parameters. (Optional for Union workers)



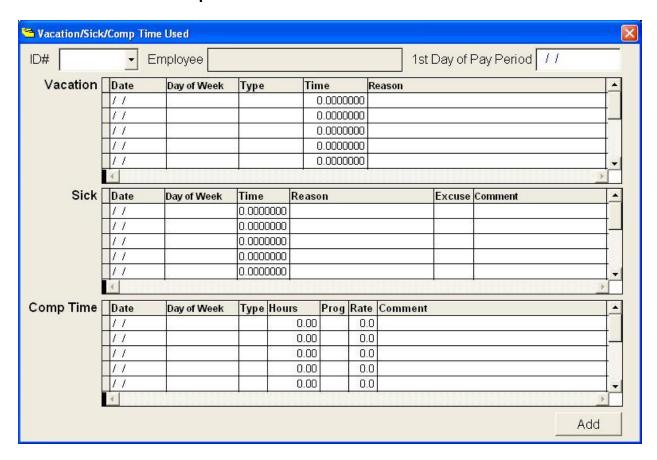
### Post Vacation/Sick Leave



This feature allows you to post accrued vacation and sick leave per pay period. This will post to all active employees. If there are any employees who are inactive, you must change their status in their record.



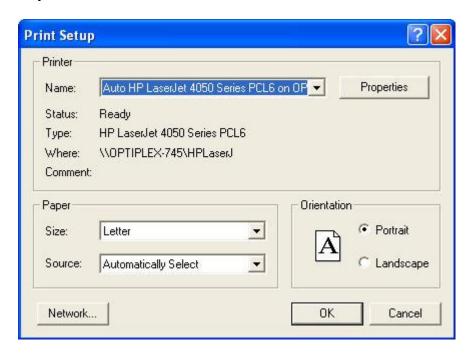
### Vacation/Sick/Comp Time Used



This feature allows you to easily enter any vacation, sick, or comp time the employee has used during the pay period.



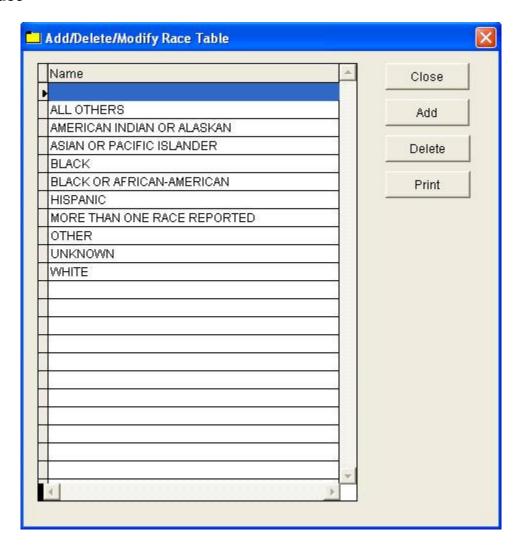
### **Print Setup**



The print setup allows you to choose from what printer you would like to print. Select the printer in the name dropdown and click " $\mathbf{OK}$ ".



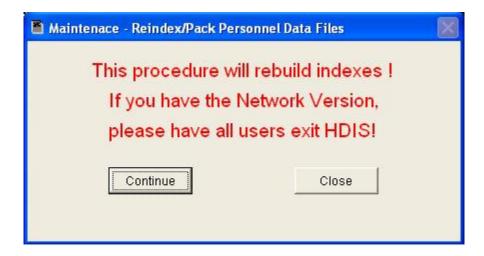
#### Race



Field/Button	Description
Name	Enter the race
Close Button	Closes the table
Add Button	Adds a line to the list
Delete Button	Deletes a highlighted entry
Print Button	Prints the list



### Reindex/Pack Personnel Data Files



This function is only needed should your data be corrupt due to a power failure. Please contact **CHC Software** if you have any questions or concerns.

CHC Software, Inc.
Health District Information Systems helpdesk@hdis.org