

e3 MANAGER'S GUIDE

# A Manager's Guide to the e3 Platform

Reference this comprehensive guide to easily navigate e3 and access all the tools you need to streamline your management processes.





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# Chapter 1

## About DATIS

Your organization is on a mission to improve lives and strengthen communities. In order to provide these important services, you need an organized and motivated workforce rallying behind your mission. At DATIS, our mission is to help you achieve yours by building better software to empower your organization with the tools you need to succeed.

For more than 20 years, we've been working hand-in-hand with Health and Human Services organizations to develop HR and Payroll software that's tailored to your unique and complex needs. Today, we continue to deliver this solution to organizations impacting lives for social good across the nation.



### Did You Know?

Our company name is DATIS (pronounced *day-tis*). The name of our unified HR and Payroll platform is e3. e3 stands for “empower. engage. evolve” because it has been purpose-built to empower leaders, engage employees, and evolve your organization.

The DATIS software, e3, is a modern and mobile platform built to empower your leaders, engage your workforce, and evolve your organization.

Our cloud-based, all-in-one system works the way you work. It grows as your organization grows. And it is continuously improved and optimized to help you overcome operational obstacles throughout your organization.



## The e3 Platform

The DATIS e3 platform is a fully unified HR and Payroll solution encompassing all aspects of the employee lifecycle including Recruiting, Onboarding, Benefits, Time & Attendance, Payroll, Talent Management, and Business Intelligence, all built on a foundation of Position Control.



### What is Position Control?

Position Control is an innovative, one-of-a-kind approach to HR and Payroll software. Built to help organizations control their costs and maximize their budgets, Position Control enables executives to plan, track, and manage their workforce by position, independent of the employees that occupy that position.

# Chapter 2

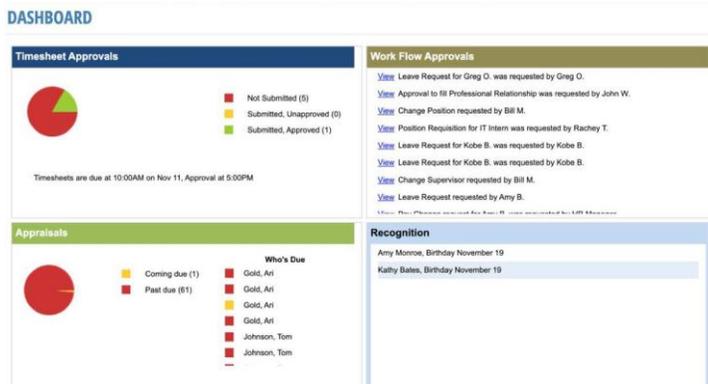
## The My Team Tab

The My Team tab is visible to all employees who have direct reports. This tab will serve as your central destination for all views and tools necessary to manage your workforce.

### Manager's Dashboard

From the dashboard, managers can see quick statistics on timesheet approvals, workflow approvals, appraisals, recognitions, employees in or approaching overtime, learning management compliance, who's out, and open corrective actions.

This interactive dashboard enables Managers to click into the pie charts for Timesheet Approvals and appraisals and it will take them directly to those pages for more details.



### Workflow Approvals Page

The approvals page is designed to allow managers to quickly view pending work orders that require their attention. The page can be accessed under the My Team tab right next to the Manager Dashboard Link.

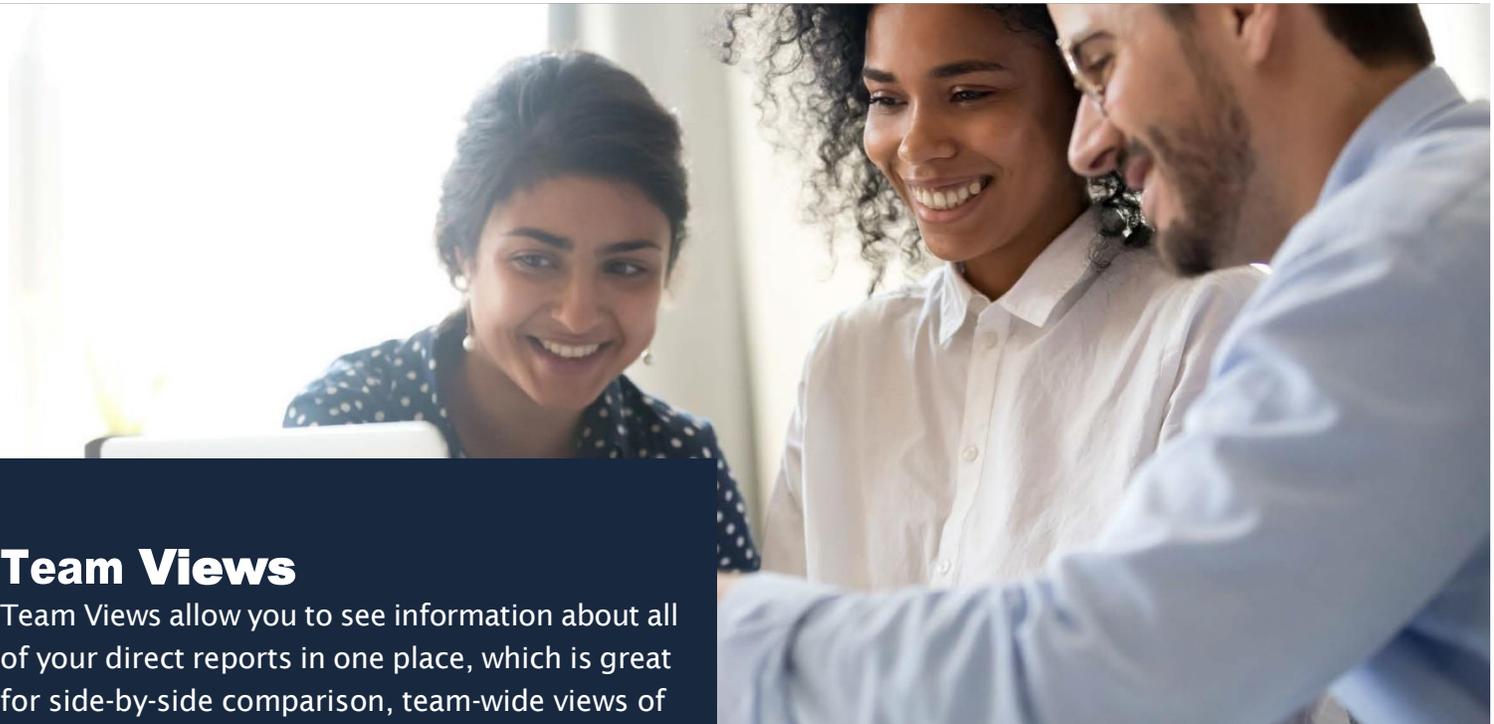


### Approvals Page Features:

- **Navigation:** Toggle between requests using the left and right arrows
- **Detail Tabs:** View all relevant information and more details about the request by clicking on the tabs
- **Approval Trail:** See who has initiated the request and who has approved so far
- **View to top:** See the chain of command for that relevant employee
- **My Work Order History:** Click this button to view previously reviewed workflows



- **Available actions:**
  - **Approve:** Approve the request
  - **Deny:** Deny the request
  - **I Need More Time:** Request more time to review the approval. All workflows are set to expire within a certain time frame defined by your Administrator
  - **Leave a comment:** All comments will be included in the notifications upon the final approval or denial of this request



## Team Views

Team Views allow you to see information about all of your direct reports in one place, which is great for side-by-side comparison, team-wide views of timesheets submitted or leave requests, and for viewing all applicants for positions that report to you. To access Team Views, click on the “My Team” tab in the menu bar, and view the links underneath the Team Views header.

### Applicants Page Features:

- View Options:** Managers can filter positions by Open and Closed statuses, and click on the different positions to view all of the applicants for each one. Applicants can be filtered by Hired and Not Hired as well as Disqualified or Not Disqualified. The position highlighted in orange is the position for which applicants are currently being displayed on the screen.
- Acting As:** Managers can act as themselves or as a supervisor underneath them. This allows managers to look through the My Team views through their entire span of control. There is also an option to view only direct reports or all reports.

## Applicants

**APPLICANTS**

Acting as: Me | Direct Reports | All Reports

Postings that are: Open | Closed

Applicants that are: Not Disqualified | Disqualified | All | Not Hired | Hired | All

Applicant	Aging	Composite Rating	Hired	Progress
Abbott, Allen	5 years	☆☆☆☆☆	This Post	■ ■ ■ ■ ■
Chandler, Robert	1 month	★★★★☆		■ ■ ■ ■ ■
Conner, Kaitlin	3 years	☆☆☆☆☆	Post 128	■ ■ ■ ■ ■
Doll, Baby	1 year	☆☆☆☆☆	Post 126	■ ■ ■ ■ ■
Klima, Andrew	5 years	☆☆☆☆☆		■ ■ ■ ■ ■
Ribeiro, Eric	2 years	☆☆☆☆☆	Post 159	■ ■ ■ ■ ■
Whitman, Slim	5 years	☆☆☆☆☆	Post 105	■ ■ ■ ■ ■

Search this posting: [ ]

Human Resource Assistant Reports to Suzette Cohen | Actively Recruiting | Position 2423

Applicants can be viewed under the My Team tab on the Applicants Team view page or a link will show on the home page called “New Applicants” should there be any applicants for positions the manager is recruiting for.

**Robert Chandler** Human Resource Assistant

★★★★☆ (2 reviews)

This application is 27 days old

Contact Robert... Rate Robert

More things I can do... Request Approval to Hire Robert Chandler

View comments and emails | View credentials | View employment documents | View application

**Robert's Progress**

- First Interview
- Second Interview
- Offer Letter
- Background Check
- New Hire

Timeline:

- 10.22.2019 12:35 PM Suzette Cohen: Second Interview
- 10.17.2019 3:52 PM Suzette Cohen: "Schedule Interview" email sent.
- 10.14.2019 11:23 AM Suzette Cohen: Great! Selected Print: Education Requirements Met
- 10.09.2019 2:19 PM Suzette Cohen: Great! Selected Print: Experience Requirements Met
- 10.08.2019 2:06 PM Suzette Cohen: Approval to Hire was cancelled.
- 10.02.2019 3:37 PM Suzette Cohen: First Interview
- 10.07.2018 3:37 PM Suzette Cohen:

## Available Applicant Actions:

- Contact the applicant
- Rate the applicant
- Change the recruiter
- Add applicant to another posting
- Unlock application
- View other applications for applicant
- Request/Edit/Cancel Approval to Hire
- View comments and emails
- View credentials
- View employment documents
- View application
- Select the applicant progress steps

Andrew Klima Human Resource Assistant +  
 ★★★★★ (1 review)  
 This application is 4 years, 10 months old

10/29/2019 2:55pm Suzie Cohen  
 Selected Pros: Education Requirements Met, Experience Requirements Met  
 Selected Cons: Pay Out of Range

12/08/2014 10:19 AM Suzie Cohen  
 Andrew was copied to this posting from within e3.

Andrew's Progress  
 First Interview  
 Second Interview  
 Offer Letter  
 Background Check  
 New Hire

Automatically send the disqualification email "Not Qualified for Posting"  
 Automatically send the email "Schedule Interview"  
 I want to create my own email  
 I don't want to send a notification

It is important that managers rate each experience with an applicant for ranking purposes. Select the number of stars that represent your interaction with the applicant. Type comments so the recruiter can see why the applicant was given that rating. Select a "Pro" or "Con" when appropriate, and then select "Save". Once saved, you will be given the opportunity to send an email.

## Requesting Approval to Hire

Robert Chandler Human Resource Assistant  
 ★★★★★ (2 reviews)  
 This application is 27 days old

10/22/2019 12:35 PM Suzie Cohen  
 Second Interview

10/17/2019 3:52 PM Suzie Cohen  
 "Schedule Interview" email sent

10/14/2019 11:23 AM Suzie Cohen  
 Selected Pros: Education Requirements Met

10/09/2019 2:19 PM Suzie Cohen  
 Selected Pros: Experience Requirements Met

10/08/2019 2:06 PM Suzie Cohen  
 Approval to Hire was cancelled.

10/02/2019 3:37 PM Suzie Cohen  
 First Interview

Request Approval to Hire Robert Chandler

Robert's Progress  
 First Interview  
 Second Interview  
 Offer Letter  
 Background Check  
 New Hire

When you've chosen an applicant to hire, select the applicant's name from the list and click the "Request Approval to Hire" button. Once clicked, it will ask for the employment details.

Step 1 - Employment Details (Complete)

Hire Date: 10/31/2019 Position: Human Resource Assistant, 2421  
 Employment Status: RFT - Regular Full Time Weekly Hours: 40 (min: 32, max: 40)  
 Annual Salary: \$40,106.00 Offerer: Suzette Cohen

Salary Grade Range  
 The below graph displays where the new pay rate falls within the range for salary grade F, Field.  
 Minimum 30,000 Maximum 45,835  
 Requested 45,106

Job Code Range  
 The below graph displays where the new pay rate falls within all employees who are in job code 340, HR Assistant.  
 Minimum 343 Maximum 55,000  
 Requested 45,106

Step 2 - Offer Details (Click here to complete Robert's offer letter) Extend Offer Letter Yes No

I have reviewed the offer details above Save Submit

Once the details have been entered, click on the next gray bar labeled "Step 2" to review and confirm the Offer Letter details. To finalize, click "Submit". Once submitted, the approval will go through the Approval to Hire workflow process as defined by your organization.

## Compensation

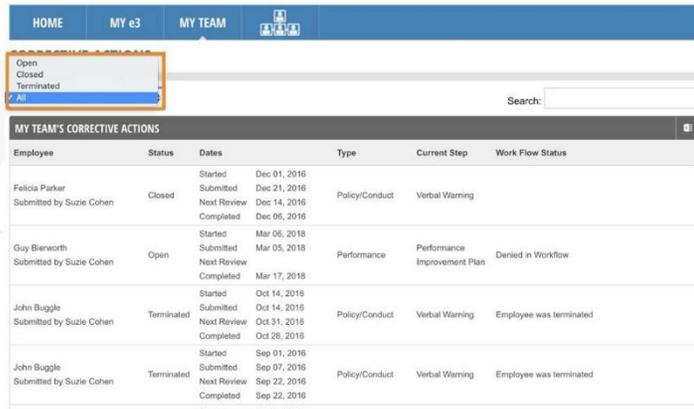
Depending on security permissions, managers may be able to view their employee's compensation details. If it is visible to you, you will see Compensation under the Team Views list within the My Team tab.

Display rates as  Hourly  Annual  Follow FLSA Classification All Job Codes

MY TEAM'S COMPENSATION						
Employee	Job Title	Position	Pay Rate	Salary Grade	Quartile	Pay Rate Effective Since
Adreanna Pepper	CNA - PRN	CNA, 258	\$22.04	Professionals	4	11.01.2017 2 Years
Alesia O'Leary	RN - On Call, 400	RN - On Call, 400	\$20.00	Field	4	04.22.2009 10 Years, 7 Months
Allen Abbott	Licensed Practical Nurse	LPN, 106	\$24,167.34	Field	4	10.01.2019 1 Month
Amanda Alshahi	Administrative Assistant	Development Intern, 2144	\$15.60	Professionals	3	12.22.2015 3 Years, 10 Months
Dakota Murphy	Administrative Assistant	Development Intern, 2144	\$22.84	Professionals	4	11.05.2018 1 Year
Diana Smith	RN - FT	RN Home Care, 157	\$0.00	Professionals	3	01.01.2008 11 Years, 10 Months
Don Sanders	LPN - PRN	LPN PRN Home Care, 205	\$15.00	Directors	2	10.14.2015 4 Years
Dre Jones	RN - FT	RN Home Care, 144	\$21.00	Professionals	1	09.14.2017 2 Years, 2 Months
Ed Flores	RN - FT	RN Home Care, 158	\$50,000.00			02.04.2016 3 Years, 9 Months
Eileen Smith	RN - FT	RN Home Care, 156	\$0.00	Professionals	2	04.03.2006 13 Years, 1 Month
Ern Dudley	CNA - PRN	CNA - PRN, 258	\$10.30		3	10.02.2006 13 Years, 10 Months
Felicia Parker	Licensed Practical Nurse	LPN, 98	\$18.54	Field	3	09.16.2002 17 Years, 2 Months
Guy Blinworth	RN - FT	RN Home Care, 142	\$40,000.00	Professionals	2	05.13.2015 4 Years, 6 Months
Jara Ferrell	Licensed Practical Nurse	LPN, 104	\$31.00	Field	4	04.22.2009 10 Years, 7 Months
John Buggie	LPN - PRN	LPN PRN Home Care, 205	\$26.50	Directors	4	03.20.2017 2 Years, 8 Months

### Corrective Actions

The Team View of Corrective Actions will display a full list of the employees on their team who have active corrective actions, as well as performance improvement plans. From this page, Managers can add an outcome, upload a file, and add further explanations. Fields that are grayed out must be modified by an administrator. Managers have the ability to start corrective actions from their organizational chart, or from the corrective actions page.



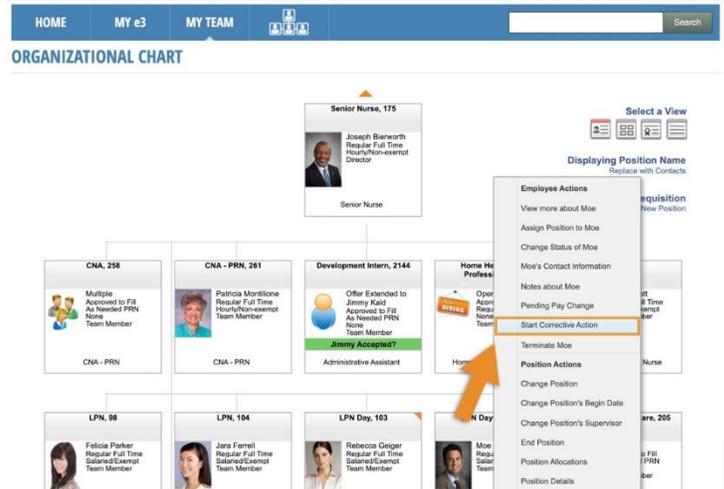
### Starting a Corrective Action

There are two ways to start a Corrective Action including from the Organizational Chart and from the Individual Views Corrective Actions page.

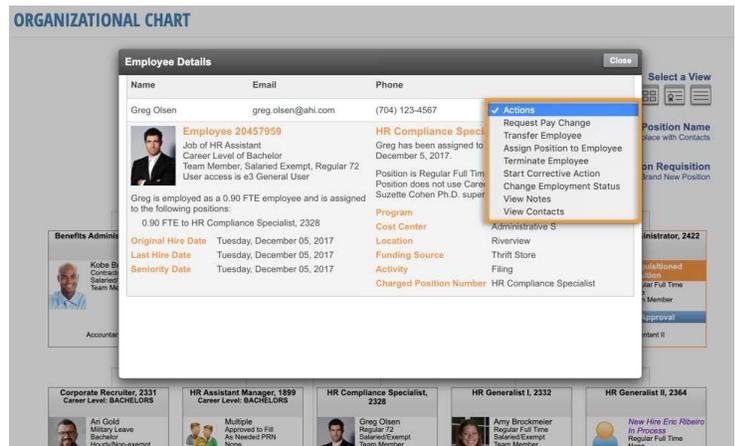
**Option 1:** You can begin a Corrective Action from the Individual Views Corrective Actions page under the My Team tab.



**Option 2:** From the Organizational Chart you can right click on the employee's tile and select "Start Corrective Action" from the drop down.



Alternatively, you can directly click the employee's name to open up the Employee Details pop up and select "Start Corrective Action" from the Actions drop down.



## Leave Time Balances

Managers can view their entire team's leave balances in one place on the Leave Time Balances Team View page. There are also different viewing options to see managers below you in your chain of command by using the Acting As drop down and/or selecting "Direct Reports" or "All Reports".

### LEAVE TIME BALANCES

Name	PTO	Sick Leave	Holiday
Bates, Kathy	0.00	0.00	0.00
Brockmeier, Amy	173.25	0.00	0.00
Brown, Mike	0.00	0.00	32.00
Bryant, Kobe	0.00	0.00	0.00
Campanola, Ly	0.00	0.00	40.00
Cohen, Suzie	311.50	24.85	23.95
Gold, Ari	0.00	0.00	0.00
Johnson, Tom	0.00	0.00	0.00
Monroe, Amy	100.00	0.00	0.00

## Performance Management

From the Performance Management Team View page, Managers can view all of their teams historic and future appraisals of all types.

PERFORMANCE MANAGEMENT

Acting as: Me Direct Reports

All Show Terminated Employees

11% performed on time

One Time Annual Evaluation (Annual) Probationary Review (Quarterly) Compliance

Annual Evaluation (Annual)

Search:

### Performance Management Page Features:

- **Acting As:** Change this drop down selection to view below you in your chain of command if applicable.
- **View Drop down:** The page will default to "All" and you can also select "Actionable" to see only appraisals that are ready to be performed.
- **Compliance:** Shows the percentage of evaluations completed on time.

- **One Time Tab:** Contains evaluations that are non-recurring (Ex: Initial 90 Day evaluation). Tip: You can check "Show Historical" to view past evaluations.

- **Perform Now Button:** If the button is red, the appraisal can still be performed but is considered late. Orange buttons indicate the appraisal is still considered on-time. A faded button indicates the appraisal cannot be performed yet.

PERFORMANCE MANAGEMENT

Acting as: Me Direct Reports

All Show Terminated Employees

0% performed on time

One Time Annual Evaluation (Annual) Compliance

Annual Evaluation (Annual)

Search:

Employee Name	2016	2017	2018	2019	2020
Adreanna Pepper			Perform Now	Perform Now	
Alesia O'Leary				Perform Now	Perform Now
Allen Abbott		Perform Now	Perform Now		
Dakota Murphy			Perform Now		
Don Sanders		Perform Now			
Dre Jones				Perform Now	
Rebecca Geiger		Perform Now			
Ry Scott					0A 11/2020

## Timesheet Approval

The Timesheet Approval Team View page is designed to allow managers to quickly approve their entire teams' time worked.

To navigate to a different employee, click on the employee's photo at the top of the screen. The page informs managers when timesheets are due, when the approval is due, as well as whether prior weeks have been submitted on time. This page automatically defaults to the current timesheet period. The period can be changed by going to the drop-down menu and selecting a different period. Leave balances also display in the top right.

### Timesheet Status Bar:

- **Full Red Bar:** Not submitted, Not Approved
- **Half Green/Half Red Bar:** Submitted, Not Approved
- **Full Green Bar:** Submitted and Approved

To navigate to a different timesheet of that same employee, click on the orange arrows next to the time frame in the gray bar. If timesheets need to be edited, they must first be unapproved and unsubmitted.

### Timesheet Views:

- **Day View**
- **Week View**
- **Calendar View**
- **Clock punches**

## Day View

The Day View of the timesheet will display total number of worked and non-worked time over the timesheet period, as well as pay types, shifts, the total number of hours, and the amount. To edit the document on this view, you can click on the document icon next to each of the days you need to change.

Date	Worked	Non-worked	Total	Dollar Amounts	Pay Type	Shift	Hours/Amt
Sun 10.27	0.00	0.00	0.00	0.00	Worked		56.00
Mon 10.28	8.00	0.00	8.00	0.00			
Tue 10.29	8.00	0.00	8.00	0.00			
Wed 10.30	8.00	0.00	8.00	0.00			
Thu 10.31	8.00	0.00	8.00	0.00			
Fri 11.01	8.00	0.00	8.00	0.00			
Sat 11.02	0.00	0.00	0.00	0.00			
Sun 11.03	0.00	0.00	0.00	0.00			
Mon 11.04	8.00	0.00	8.00	0.00			
Tue 11.05	8.00	0.00	8.00	0.00			
Wed 11.06	0.00	0.00	0.00	0.00			
Thu 11.07	0.00	0.00	0.00	0.00			
Fri 11.08	0.00	0.00	0.00	0.00			
Sat 11.09	0.00	0.00	0.00	0.00			
<b>Total</b>	<b>56.00</b>	<b>0.00</b>	<b>56.00</b>	<b>0.00</b>			<b>56.00</b>
<b>Total Amount</b>				<b>0.00</b>			<b>0.00</b>

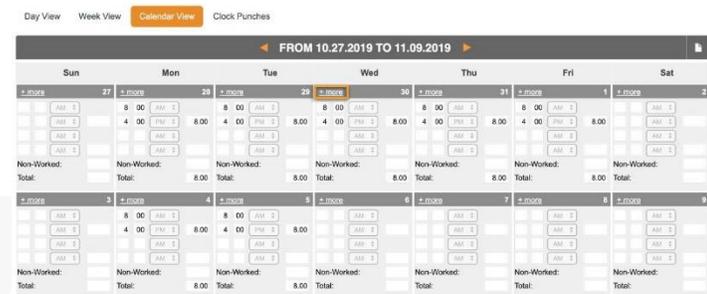
## Week View

The Week View shows the in and out times, the shifts, job, and cost centers. To edit the timesheet in this view, you can click on the document icon next to any of the In/Out line items. Once a timesheet has been submitted, the Edit and Delete features will be disabled.

Appr	Day	Type	In	Out	Hrs/Amt	Shift	Job	Cost Center	Pay Type	Shift	Hours/Amt
	Mon 10.28	Worked	8:00	4:00	8.00	330	22		Worked		40.00
	Tue 10.29	Worked	8:00	4:00	8.00	330	22				
	Wed 10.30	Worked	8:00	4:00	8.00	330	22				
	Thu 10.31	Worked	8:00	4:00	8.00	330	22				
	Fri 11.01	Worked	8:00	4:00	8.00	330	22				
<b>Total Worked Hours: 40.00</b>											
<b>Total Other Hours: 0.00</b>											
<b>Total Hours: 40.00</b>											
<b>Total Amount: 0.00</b>											
<b>Week Ending 11.09.2019</b>											
	Mon 11.04	Worked	8:00	4:00	8.00	330	22		Worked		16.00
	Tue 11.05	Worked	8:00	4:00	8.00	330	22				
<b>Total Worked Hours: 16.00</b>											
<b>Total Other Hours: 0.00</b>											
<b>Total Hours: 16.00</b>											
<b>Total Amount: 0.00</b>											

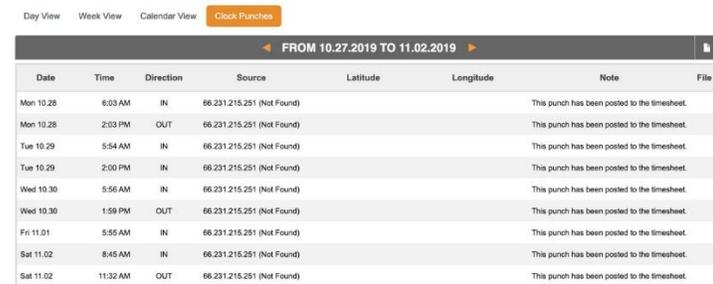
### Calendar View

The Calendar View option will show a consolidated and stacked two-week view, which is helpful for viewing timesheets over more than a one-week period at a glance. You can edit time on this view by simply clicking into the cells next to Worked or Non-Worked Time and the Total cell will calculate automatically or click on the “+ more” link to view and edit that day.



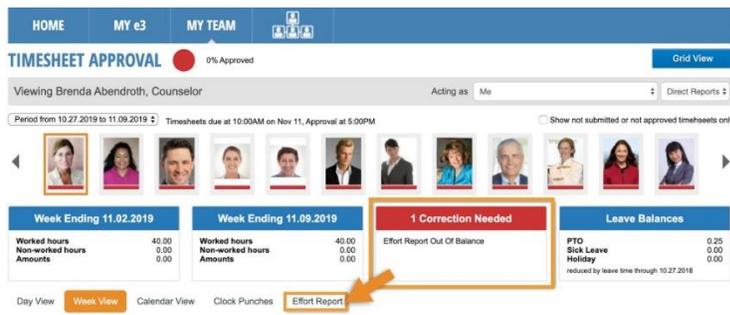
### Clock Punches

The punches from the Clock Punch View will provide the date, the time, the direction (in, out, transfer), the sources of the punch (IP address), and any notes regarding the punch. Managers can copy/paste the longitude and latitude of the punches into Google if they want a map view of where that punch came from. **Note:** IP Filters are set up by administration to restrict employees to clocking in from specified locations. This only allows location view at the moment of the punch, not a continuous access to the employee’s location.



### Effort Report

The Effort Report shows hours worked versus hours allocated. The effort report view will not show up for all employees, only for employees that are required to use an effort report (set up by your company).



e3 will not allow employees requiring effort reports to submit their timesheet unless they have allocated all of their worked time. If there is a correction flag for “Effort Report Out of Balance”, it means that some of the days are not filled in. The effort report will have red dots next to the days not in balance, as shown in below screenshot.

Effort Report for Pam Berlinger from October 27, 2019 to November 9, 2019

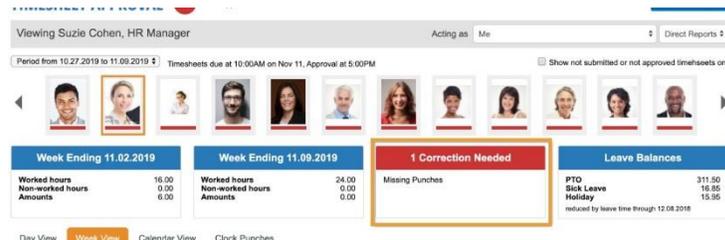
Save Out of balance Day in balance Day out of balance

This grid displays only hours worked. Other paid time is not included in the effort report but will be paid as per the timesheet.

Cost Center (Show All)	Total	Sun 10/27 2019	Mon 10/28 2019	Tue 10/29 2019	Wed 10/30 2019	Thu 10/31 2019	Fri 11/01 2019	Sat 11/02 2019	Sun 11/03 2019	Mon 11/04 2019	Tue 11/05 2019	Wed 11/06 2019	Thu 11/07 2019	Fri 11/08 2019
Hours Worked	80.00		8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	8.00	8.00
Hours Allocated	64.00		8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	-	-
Facilities Managemx	64.00		8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00		

### Timesheet Corrections

Before a timesheet can be submitted and approved, make sure to address any corrections being noted. See example below.



## Timesheet Approval Grid

The Timesheet Approval Grid Team View page will show the timesheets that have not been submitted, those that are submitted and unapproved, and those that are submitted and approved. This will also quickly highlight any errors on that timesheet (i.e. leave balances exceeding, effort report unbalanced, missing/overlapping punches).

- Two Red Dots: Not Submitted, Not Approved
- One Green, One Red Dot: Submitted, Not Approved
- Two Green Dots: Submitted and Approved

Some examples of corrections to be addressed are shown in the image below.

Submitted/Approved	Employee	Worked Hours	Non-worked Hours	Total Hours	Other Amounts	Supervisor
Not Submitted	Berg, Eric	0.00	0.00	0.00	0.00	Gaby, Gaby <span>Missing punches</span>
Submitted, Not Approved	Cruson, Roberta	0.00	0.00	0.00	0.00	Bierworth, Joseph <span>Leave balance exceeded</span>
Submitted, Not Approved	Ehlen, Mary	0.00	0.00	0.00	0.00	Goff, Jea <span>Leave balance exceeded</span>
Submitted, Not Approved	Garcia, Irs	0.00	0.00	0.00	0.00	Gold, Ari <span>Leave balance exceeded</span>
Submitted, Not Approved	Gerold, Angel	0.00	0.00	0.00	0.00	Peterson, Sarah <span>Leave balance exceeded</span>
Submitted, Not Approved	Klein, Mary	0.00	0.00	0.00	0.00	Phillips, Austin <span>Leave balance exceeded</span>
Submitted, Not Approved	Enfinger, Gine	0.02	0.00	0.02	0.00	Shrestha, Keny <span>Missing punches</span>
		0.02	0.00	0.02	0.00	

## Who Is Going To Be Out?

The Who Is Going To Be Out Team View Page will show the times pending approval, and approved days an employee will be all, or partially absent, will be depicted. This page helps managers ensure that appropriate staffing levels are maintained. The view can be jumped forward or backward by week or 30 day period using the green arrow buttons on the

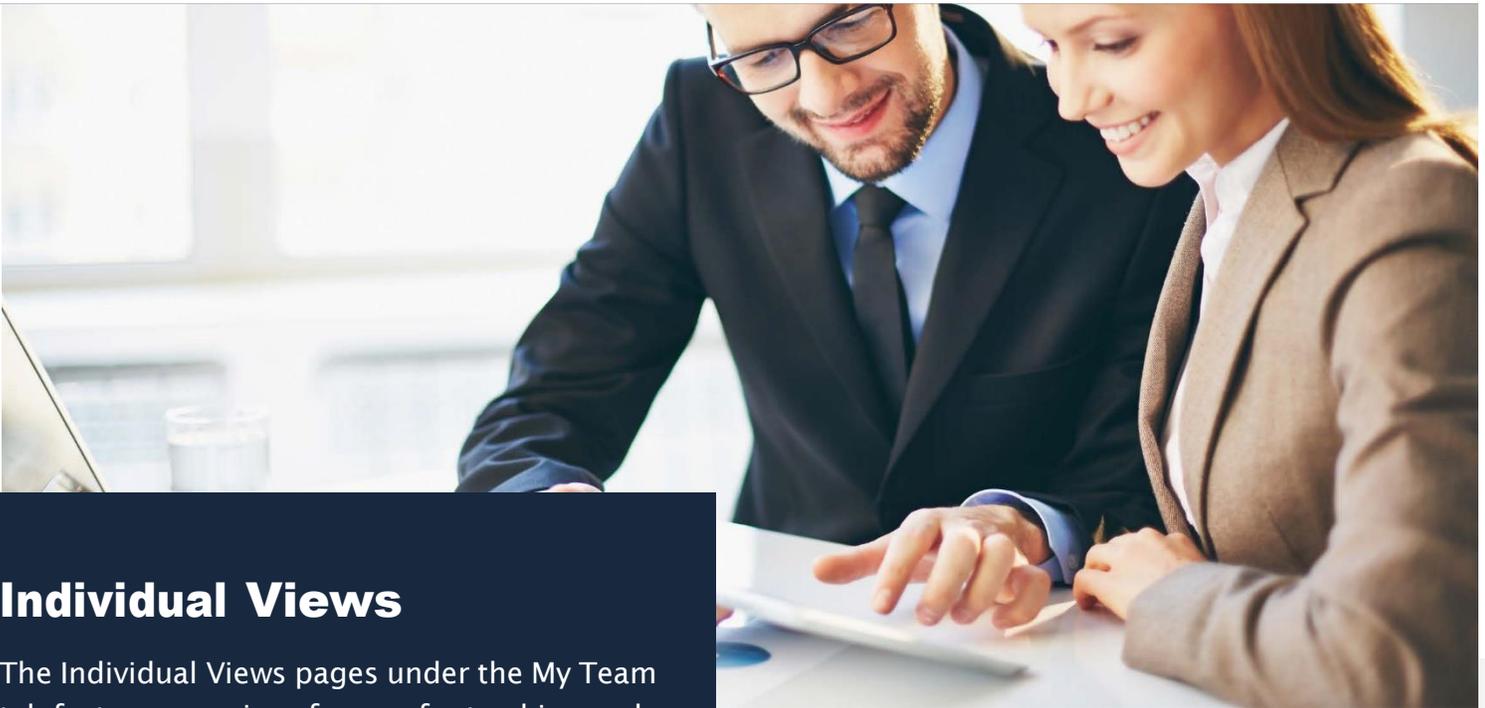
top right of the chart. There is also a quick link at the top of the page to jump to the current days view by clicking the blue button that reads, “Click here to go to today”.

### WHO IS GOING TO BE OUT?

Clicking on any of the days will open a pop up window that shows leave request details including the type of leave selected and leave balances for the employee.

## Canceling a Leave Request

If an employee wants to cancel a leave request, the employee can do that from their My e3 page or the manager can cancel it from this page as long as the date has not occurred (date is in the future). When you click on the future date, it will show the “Cancel Leave Request” button which will start the workflow for the manager’s approval.

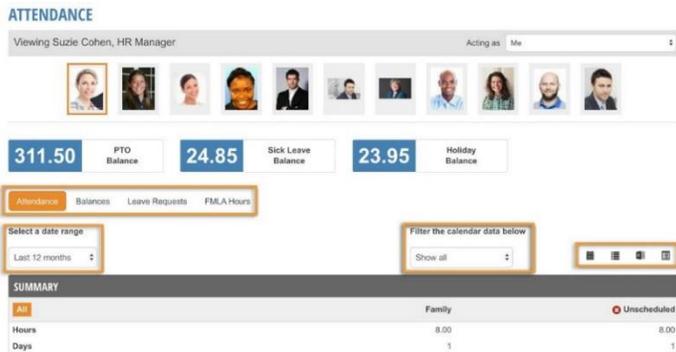


## Individual Views

The Individual Views pages under the My Team tab features a series of pages for tracking and managing your workforce. The Individual Views pages are a great place to dive into more detail about each individual employee, versus the more high-level, side-by-side comparisons offered on the Team Views pages.

### Attendance

The attendance calendar gives an individual employee overview of reasons why an employee has missed work for the entire year.



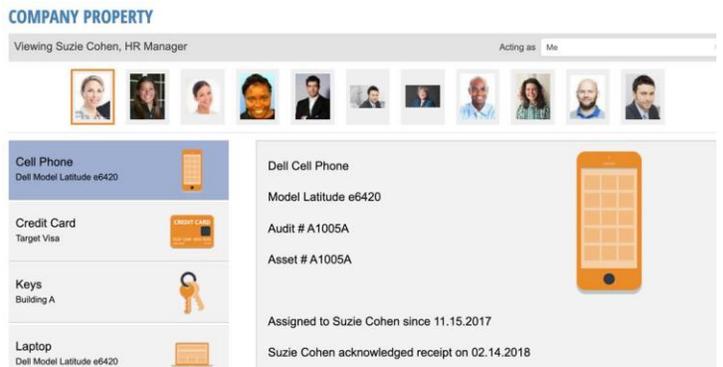
#### Attendance Page Views:

- **Attendance Tab:** Shows a monthly calendar view of all leave types. Different view filters can be applied as highlighted in the above screenshot.

- **Balances Tab:** Where the manager can view the current accrual balances for employee.
- **Leave Requests Tab:** Where the manager can view all leave requests submitted from employee.
- **FMLA Hours Tab:** If an employee is, or has been out on FMLA, managers can click on the FMLA tab to view total FMLA Hours during the past 12 months, or any date range entered.

### Company Property

This page is designed to help managers track property that has been issued to an individual on their team, and ensure that if an employee terminates, they collect all property belonging to your organization.



## Credentials

Managers view credentials held by their employees, as well as which ones are required for their current position, and the when they are due to expire.

### CREDENTIALS

### CREDENTIALS

Managers can add credentials for their team by clicking on the drop down to select the credential type to add. Managers will be prompted to enter in the details regarding the credential. In addition, they will be able to upload documents that are required for that credential.

### CREDENTIALS

Document Name	Issue Date	Expiration Date	File Name	Browse to upload
Advanced Cardiac Life Support	Required	Missing	Choose File	No f...sen
Pediatric Advanced Life Support Cert	Required	Missing	Choose File	No f...sen

Managers can also edit, delete, renew, and revoke certifications by clicking on the details button. They will also be able to upload new documents when renewing a credential.

## Documents

Documents includes different types of employment files created by your company for employees to review and acknowledge. This page shows whether the document as been acknowledged or not. You can also view the details of each document type by clicking on it.

### DOCUMENTS

Document Name	Document Type	Effective Date	Acknowledged/Submitted	Date Acknowledged/Submitted	Attachment Date
<b>Job Descriptions</b>					
Historical Job Descriptions - HR Benefits Manager	Image				04.21.2015
<b>Acknowledgements</b>					
Agency Orientation Agenda	Electronic	12.19.2018	✓	01.16.2019	12.20.2018
Employee Handbook	Electronic	10.09.2019	Waiting		10.10.2019
Objective Statement	Electronic	04.21.2016	✓	06.21.2016	04.22.2016
Tobacco-Free Work Place	Electronic	04.20.2018	✓		05.01.2018
<b>Required</b>					
401k Plan Memo	Electronic	09.24.2018	✓		01.16.2019
FMLA Notification	Electronic	01.15.2019	Waiting		
<b>Medical</b>					
HIPAA Statement	Electronic	04.20.2018	✓		09.05.2018
Medical	Electronic	06.11.2014	✓		09.10.2014

## Pay History

Depending on security permission, Managers may be able to view their employee’s compensation, as well as several other fields on the Pay History Individual Views page. The filter feature allows them to sort by specific dates, quarters, or check date. The data can be expressed as an amount, gross pay, hours, or a quantity by using the radio buttons. This information can be exported by choosing one of the output options.

## Skills

The Skills Individual View page allows managers to view each employees’ skills, such as other languages or computer proficiencies.

Req	Description	Institution	Score	Issue Date	Expires	Docs Completed
No	Coach	Lacrosse			Never	Not applicable
Yes	Microsoft Office					No
No	Other Language	High School			Never	Not applicable
No	Spanish	Phoenix	10.00		Never	Not applicable

## Timesheets

The Timesheets Individual View page will display submitted and unsubmitted timesheets for a specific employee. To navigate to a different employee, click on the employee’s photo at the top of the screen. The page informs managers when timesheets are due, when the approval is due, as well as whether prior weeks have been submitted on time.

Time Period	Status	Tardies	Days w/ Hrs	Worked Hrs	Non-worked	Total Hrs	Other Amounts
11.10-11.23	Submission due by 11.25 at 10.00AM Approval due by 11.25 at 5.00PM	0	0	0.00	0.00	0.00	0.00
10.27-11.09	Submission due by 11.11 at 10.00AM Approval due by 11.11 at 5.00PM	0	10	80.00	0.00	80.00	0.00
10.13-10.26	Submitted late by MW Approved late	0	10	80.00	0.00	80.00	0.00
09.29-10.12	Submitted late by MW Approved late	0	10	80.00	0.00	80.00	0.00
09.15-09.28	Submitted late by MW Approved late	0	10	80.00	0.00	80.00	0.00
09.01-09.14	Submitted late by MW Approved late	0	10	80.00	0.00	80.00	0.00
		0	50	400.00	0.00	400.00	0.00

## Reporting

To access the Manager's Reporting features, click on "My Team" and view the Reporting list. Under Reporting, you will have the following options:

- Labor Trends
- Learning Management
- Vacancy
- Variable Employee

**Note:** Learning Management is a separate module in e3 that your company may or may not be using. Please reach out to the e3 administrators within your company for any questions.

### Labor Trend Report

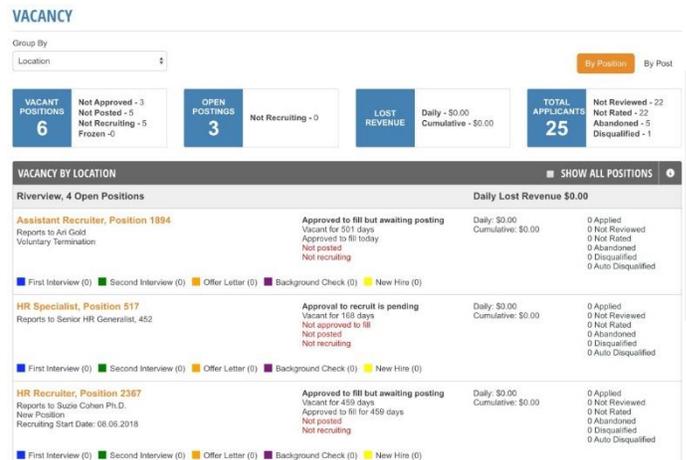
Depending on security permissions, managers may be able to view labor trends. Labor trends gives managers a quick glance at their labor cost over the past 8 time periods. The data can be filtered by the designated drop down, and expressed as dollars or hours (depending on security access). It can also be filtered by overtime premium or PRN costs by clicking on the buttons on the top right corner.

### Variable Employee Report

The variable employee report allows managers to keep track of variable employees by viewing the time elapsed in their measurement period and their average weekly hours to date.

### Vacancy Report

The vacancy report is a great resource to view the status of open positions, whether the positions are approved, and if Human Resources is recruiting to refill the position. It also provides insight into the daily-lost revenue associated with revenue generating positions. In addition, it will provide information regarding how many applicants have applied, and how many of them have actually been viewed. This report can also be grouped by any organizational level.



# Position Control

To Access the Position Control pages, click on My Team and view the links underneath the Position Control header.

## Position Details

The Position Details page allows managers to view the employee assigned to the position, their employee number, their FTE status, PayGroup, and job code information. You can also change the last two columns to show different organizational levels "Field 1" and "Field 2"

### POSITION DETAILS

You can customize two fields of the grid by selecting the values below.

Field 1

Field 2

[Refresh](#)

Company	Pos #	Description	Emp #	Employee Name	FTE	PayGroup	Job	Cost Center	Program
AHI	1904	Assistant Recruiter			1.00	002	325	37	60
AHI	1508	Assistant Recruiter	141	Abbott, Andrew	1.00	001	330	37	60
AHI	2413	Benefits Administrator			1.00	001	ADMR	37	60
AHI	1910	Benefits Administrator	1052	Brown, Mike	1.00	001	ADMR	37	60
AHI	2208	Benefits Administrator	489	Bryant, Katie	1.00	001	ADMR	37	60
AHI	2331	Corporate Recruiter	20457999	Gold, Ari	1.00	001	330	22	60
AHI	295	HR Assistant	1022	Bolay, Dee	1.00	002	340	33	60
AHI	1885	HR Assistant	490	Brook, Gina	1.00	001	340	37	10
AHI	1899	HR Assistant Manager	20457991	Bates, Kathy	1.00	001	325	24	50
AHI	1899	HR Assistant Manager	20457934	Campanota, Ly	1.00	001	325	24	50
AHI	1899	HR Assistant Manager	20457971	Monroe, Amy	1.00	001	325	24	50
AHI	1899	HR Assistant Manager	20457882	Olsen, Jimmy	1.00	001	325	24	50
AHI	2328	HR Compliance Specialist	20457959	Olsen, Greg	1.00	001	340	44 S	50

## View Position Details

Click on a position description name to view more details about the position.

**Position 1899, HR Assistant Manager**  
Becky McCabe > Jackie Tolson > Suzie Cohen > Jimmy Olsen  
Position occupied by multiple employees

Details | Assignment History | Job Description | Budget History

<b>Structure</b>	<b>Job Information</b>	<b>Organizational Levels</b>
Position Number: 1899	Job Code: 325 HR Manager	Program: 50 Home Care
Position Name: HR Assistant Manager	Career Level: BACHELORS	Cost Center: 24 Leon Facilities
Frozen: No	FLSA Status: Hourly/Non-exempt	Location: 001 Riverview
Position Created: 02.02.2014	Employment Status: PRN As Needed PRN	Funding Source: 100 Thrift Store
Last Edited: 06.01.2019	Position FTE: 1.00	Activity: 123 Filing
Position End: No end	Corporate Level: DIR Director	Charged Position Number: 1899 HR Assistant Manager
Reports to: HR Manager	<b>Productivity Targets</b>	
Company: AHI AHI Care	Productivity (%): 65.00	
PayGroup: 001 Friday Pay	Productive Hours: 1075	
	Budgeted Annual Salary: 31200.00	

Current - From 06.01.2019 to No End 2 [Show GL](#)

## Assignment History

The Assignment History displays who has been assigned to the position in the past, who is currently assigned, and who is scheduled to be assigned to the position in the future, if applicable.

**Position 1899, HR Assistant Manager**  
Becky McCabe > Jackie Tolson > Suzie Cohen > Jimmy Olsen  
Position occupied by multiple employees

Details | Assignment History | Job Description | Budget History

**Future Assignments**  
There are no future assignments

**Current Assignments**  
Amy Monroe from April 18, 2019 to Current  
Jimmy Olsen from January 31, 2019 to Current  
Kathy Bates from April 1, 2019 to Current  
Ly Campanola from March 15, 2019 to Current

**Past Assignments**  
Carolyn Justice from April 8, 2014 to February 26, 2018  
Gary Lancaster from February 2, 2014 to October 1, 2017  
Jimmy Floresca from December 10, 2018 to February 1, 2019  
Nadine Kelley from January 7, 2016 to February 1, 2019  
Paul Pierce from February 3, 2014 to July 8, 2014

## Job Description

The Job Description tab allows managers to view the job code description, as well as duties assigned to that position. Employees are asked to acknowledge their job description each time it is changed by the administration team. The print icon will allow managers to print out the job description if they need to review it with their team.

**Position 1899, HR Assistant Manager**  
Becky McCabe > Jackie Tolson > Suzie Cohen > Jimmy Olsen  
Position occupied by multiple employees

Details | Assignment History | Job Description | Budget History

Job Component + Career Level Component + Position Component Not Used = Full Job Description

**Job Component**

**Human Resource Manager Job Purpose:** Maintains and enhances the AHI's human resources by planning, implementing, and evaluating employee relations and human resources policies, programs, and practices.

**Skills/Qualifications:** Hiring, Human Resources Management, Benefits Administration, Performance Management, Communication Processes, Compensation and Wage Structure, Supports Diversity, Classifying Employees, Employment Law, Laws Against Sexual Harassment, Organization

**Career Level Component**

Bachelors Level must have an additional 4 years of experience in the field, minimum of 2 years of technical training in the specified area of expertise.

Effective  Career Level

[Print](#)

## Employee Position History

From the main Position Details page, managers can also click the employee's name and see the employee's position history.

**POSITION DETAILS**

You can customize two fields of the grid by selecting the values below.

Field 1

Field 2

[Refresh](#)

Company	Pos #	Description	Emp #	Employee Name	FTE	PayGroup	Job	Cost Center	Program
AHI	1894	Assistant Recruiter			1.00	002	325	37	60
AHI	1508	Assistant Recruiter	141	Abbott, Andrew	1.00	001	330	37	60
AHI	2413	Benefits Administrator			1.00	001	ADMR	37	60
AHI	1910	Benefits Administrator	1052	Brown, Mike	1.00	001	ADMR	37	60

**Employee Details**

Mike Brown



**Position History**

Position #	Position	From	To
1910	Benefits Administrator	09/08/2015	12/31/19999
1894	Recruiting Manager	01/06/2014	09/07/2015

## Rollups

Managers can utilize this page to see the total number of positions that report to them by job code. It will tell them how many are filled or open, and what the FTE status is for those positions. More importantly, it provides insight to the budgeted amount versus the actual total of compensation that is currently being paid out. The variance column can assist managers with requisitioning a new position by telling them what is left in the budget for that job code or if it has been under budgets.

**ROLLUPS**

Position Control is date sensitive. What date would you like to display? 11/13/2019

Rollups By: Program

By Assignment | By Allocation

Program	Filled Positions			Open Positions			Budgeted Salary			Assigned Employees			Variance	Open Positions		
	Filled	Open	Total	Filled FTE	Open FTE	Total FTE	Budgeted Salary	Assigned Employees		Budgeted Salary	Assigned Employees			Budgeted Salary		
10 - Administration	1	1	2	0.00	2.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
50 - Home Care	2	1	3	1.90	1.10	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
50 - Human Resource	9	4	13	7.88	5.12	13.00	190,960.08	246,866.40	-55,906.32	98,694.96			98,694.96			
1598 - Assistant Recruiter	1	0	1	1.00	0.00	1.00	60,000.00	32,911.40	27,088.60	0.00			0.00			
1894 - Assistant Recruiter	0	1	1	0.00	1.00	1.00	0.00	0.00	0.00	0.00			98,694.96			
1910 - Benefits Administrator	1	0	1	1.00	0.00	1.00	0.00	98,695.00	-98,695.00	0.00			0.00			
2089 - HR Specialist	1	0	1	1.00	0.00	1.00	0.00	0.00	0.00	0.00			0.00			
2208 - Benefits Administrator	1	0	1	1.00	0.00	1.00	0.00	0.00	0.00	0.00			0.00			
2331 - Corporate Recruiter	1	0	1	0.00	1.00	1.00	0.00	0.00	0.00	0.00			0.00			
2332 - HR Generalist I	1	0	1	1.00	0.00	1.00	0.00	0.00	0.00	0.00			0.00			
2367 - HR Recruiter	0	1	1	0.00	1.00	1.00	0.00	0.00	0.00	0.00			0.00			
2368 - Recruiting Specialist	0	1	1	0.00	1.00	1.00	0.00	0.00	0.00	0.00			0.00			
2413 - Benefits Administrator	0	1	1	0.00	1.00	1.00	0.00	0.00	0.00	0.00			0.00			
295 - HR Assistant	1	0	1	1.00	0.00	1.00	19,760.04	19,760.00	0.04	0.00			0.00			
443 - MIS Assistant	1	0	1	0.88	0.12	1.00	61,200.00	45,500.00	15,700.00	0.00			0.00			
517 - HR Specialist	1	0	1	1.00	0.00	1.00	50,000.04	50,000.00	0.04	0.00			0.00			
<b>Totals</b>	<b>12</b>	<b>6</b>	<b>18</b>	<b>9.78</b>	<b>8.22</b>	<b>18.00</b>	<b>190,960.08</b>	<b>246,866.40</b>	<b>-55,906.32</b>	<b>98,694.96</b>						

# Chapter 3

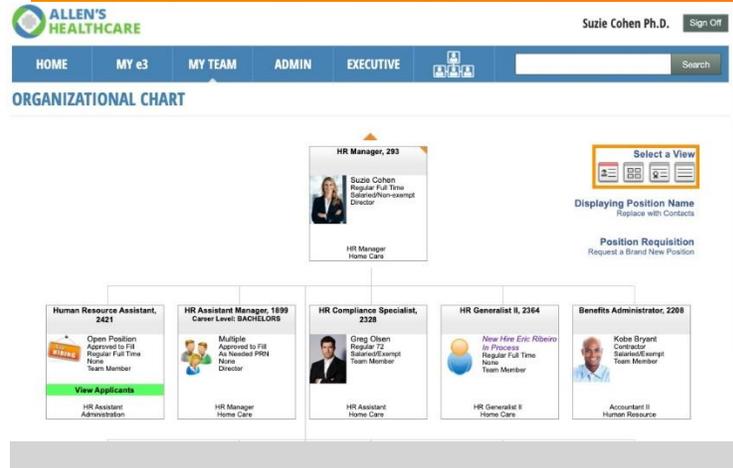
## The Organizational Chart

The organizational chart has countless action items and information that managers can do in one place. Managers can access the organizational chart from the home page by clicking on the organizational chart icon in the main menu bar at the top of each page.

From the organizational chart, managers can change the view by selecting one of four views on the right-hand side of the page.

- **Position Name View (Default)**
- **Position Details View:** Displays information about the position's FTE and number of reports
- **Credentials View:** Displays credential requirements of the position
- **Position's Coding View:** Displays details regarding the organizational dimensions assigned to the position (location, cost center, program, etc.)

If a position's tile has an orange tick in the top right corner, it indicates that the position has standard labor allocations set.

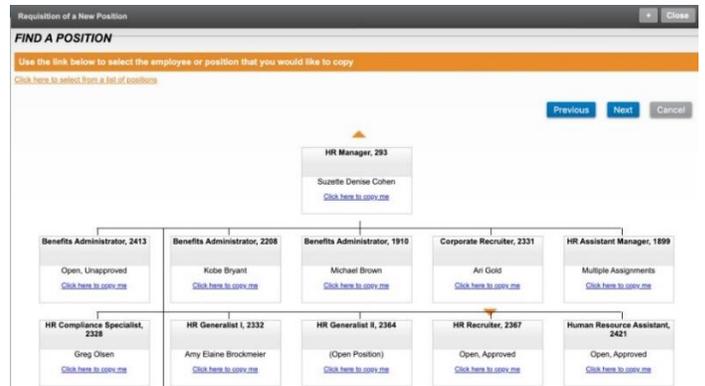


### Position Requisition

Managers can request to have a new position created by clicking on the blue Position Requisition link in the top right. A box will pop up walking you through the steps.



First, select if you will create a position from scratch, or copy an existing position. When copying a position, you will be presented with a list of positions to select from, displayed as they currently sit on the organizational chart.



Once this request is submitted, it will go through a workflow approval process. The organizational chart will show that the position has been requisitioned and you can track the approval.

## Employee Details and Actions

Managers can view employee details from their team organizational chart by clicking on the employee's name. A box will pop up showing the employee details as shown below. Some details may be hidden depending on the security your organization set up.

**Employee Details**

Name	Email	Phone	Actions
Greg Olsen	greg.olsen@ahi.com	(704) 123-4567	Actions

**Employee 20457959**  
 Job of HR Assistant  
 Career Level of Bachelor  
 Team Member, Salaried Exempt, Regular 72  
 User access is e3 General User

Greg is employed as a 0.90 FTE employee and is assigned to the following positions:  
 0.90 FTE to HR Compliance Specialist, 2328

**Original Hire Date** Tuesday, December 05, 2017  
**Last Hire Date** Tuesday, December 05, 2017  
**Seniority Date** Tuesday, December 05, 2017

**Program** Home Care  
**Cost Center** Administrative S  
**Location** Riverview  
**Funding Source** Thrift Store  
**Activity** Filing  
**Charged Position Number** HR Compliance Specialist

### Available Employee Actions

- Request a pay change
- Transfer employee to another position
- Assign a position to an employee
- Terminate an employee
- Start a corrective action (as shown in the corrective actions section of this guide)
- Change the employment status or weekly hours (FTE) of an employee
- View/add notes on an employee
- View employee's contact information

There are two ways to access employee actions:

**Option 1:** Click on the employee's name from the organizational chart and open the "Actions" drop down within the Employee Details pop up.

**Option 2:** Click on the white space within the position's tile to open the drop down menu.

### ORGANIZATIONAL CHART

### Request Pay Change

Click the Request Pay Change link using one of the employee actions menus shown above. A pop up window will open and walk you through the pay change process.

Once an amount is entered, you will be able to see if the pay change they are requesting falls within the salary grade range for the position. Also, the job code range shows what is currently being paid to employees within that job code.

### ORGANIZATIONAL CHART

Even if the new compensation being requested falls within the salary grade range, the pay rate change may be out of policy for other reasons. If it is, managers will need to click on the out of policy icon and acknowledge the reason that it is out of policy before they can submit the request..

Before submitting this pay change request, place a check next to the exceptions to acknowledge.

Salary is outside the Salary Grade's range.

Salary does not exceed the 10000.00% change rule.

Salary does not occur within 360 days.

Policy acknowledgements

12 months since last change.  
\$42,756.48 to \$50,000.00.  
Good Behavior.

Out of Policy

Cancel Submit Request

### Changing Employees Position

There are two options to change an employee’s position. Managers can choose to add a position to an employee with the “Assign Position to Employee” option. Or, Managers can use the “Transfer Employee” action to transfer an employee to another position, meaning it will unassign them from the current position and transfer the employee to the new position.

#### Option 1: Assign Position to Employee

Managers can choose to add a position to an employee’s total assignments. When adding a position, it will ask which position should be considered the employee’s primary assignment. To access this function, choose “Assign Position to Employee” from one of the Employee Actions drop down menus (shown above).

First, choose the effective date of the assignment.

#### ORGANIZATIONAL CHART

SELECT A START DATE FOR THIS ASSIGNMENT

Start Date  
11.18.2019

Back Continue

Then, search for the positions to add. Note: multiple positions can be selected, as applicable.

#### ORGANIZATIONAL CHART

SELECT THE POSITION(S) TO TRANSFER TO

Back Continue

Search...

<b>Clinic Support Specialist, 132</b> Reports to Meghan Barszovya Regular Full Time 40 hours (1 FTE) 120.00 open hours 3.00 open FTE	<b>Home Health Aide-PRN, 1793</b> Reports to Clarissa Cahoun As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE	<b>Home Health Aide PRN, 1859</b> Reports to Clarissa Cahoun As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE
<b>HR Manager, 1898</b> Reports to Jacklyn Tolson As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE	<b>HR Assistant Manager, 1899</b> Reports to Suzette Cohen As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE	<b>Community Outreach, 1902</b> Reports to Clarissa English-Hurst As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE
<b>Stagehand, 193</b> Reports to Britane Echols As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE	<b>LPN - PRN, 194</b> Reports to Karen Blair As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE	<b>LPN - PRN, 195</b> Reports to Karen Blair As Needed PRN 40 hours (1 FTE) 0.00 open hours 0.00 open FTE

Once the positions are selected, you will indicate on the next page which position will be primary.

Follow the remaining steps for filling out information needed for the assignments. Once completed, it will go through the workflow approval process set up by your organization.

#### Option 2: Transfer Employee

Choose the “Transfer Employee” option from one of the Employee Actions drop down menus. Transferring an employee not only allows for a manager to request a reassignment to a new position, but also any associated pay rate change in the same workflow.

Once a manager selects to transfer the employee, they will be prompted to enter the effective date of the transfer along with the reason it is being requested (shown on next page).

#### ORGANIZATIONAL CHART

SELECT AN EFFECTIVE DATE AND REASON FOR THIS TRANSFER

Effective Date  
11.08.2019

Reason  
Promotion

Comments  
Greg has been exceeding expectations

Back Continue

Next, the manager will be asked to select the position(s) they wish to transfer the employee to. They will have the option to either select from the list of open positions or search for the position.

ORGANIZATIONAL CHART

Position Title	Reports To	As Needed PRN	0.00 open hours
Clinic Support Specialist, 132	Meghan Borsoyova	40 hours (1 FTE)	3.00 open FTE
Home Health Aide-PRN, 1793	Clarissa Calhoun	40 hours (1 FTE)	0.00 open FTE
Home Health Aide PRN, 1859	Clarissa Calhoun	40 hours (1 FTE)	0.00 open FTE
HR Manager, 1898	Jacklyn Tolson	40 hours (1 FTE)	0.00 open FTE
HR Assistant Manager, 1899	Suzette Cohen	40 hours (1 FTE)	0.00 open FTE
Community Outreach, 1902	Clarissa English-Hurst	40 hours (1 FTE)	0.00 open FTE
Stagehand, 193	Brittane Echols	40 hours (1 FTE)	0.00 open FTE
LPN - PRN, 194	Karen Blair	40 hours (1 FTE)	0.00 open FTE
LPN - PRN, 195	Karen Blair	40 hours (1 FTE)	0.00 open FTE
LPN - PRN, 196	Karen Blair	40 hours (1 FTE)	0.00 open FTE
Volunteer Substitute, 1963	Volunteer Coordinator, 177	0 hours (0 FTE)	0.00 open FTE
LPN - PRN, 197	Karen Blair	32 hours (0.8 FTE)	0.00 open FTE

The manager will then be asked to enter in the details about the employee's new assignment to the position. This includes fields like their weekly hours in the position, the new pay rate, and any career level associated with the new position's job code.

**CHOOSE ADDITIONAL DETAILS**

Clinic Support Specialist, 132 Reports to Meghan Borsoyova

Clinic Support Specialist, 132 is a 1 FTE position at 40 hours per week with an employment status of Regular Full Time

How many hours would you like to assign this employee to this position? The position has 120.00 open hours (3.00 open FTE).

36

Select a career level for this employee: Bachelor

Select a step for this employee: [Dropdown]

Current Pay Rate: \$22.84000 per hour

New Pay Rate: \$24.00

Percentage Change: 5.08%

**Out of Policy**

Salary is outside of Salary Grade's range

**Job Code Range**

The below graph displays where the new pay rate falls below all employees who are in job code 500, Clinical Support Specialist.

Minimum	Maximum
\$10.00	\$21.00
	Requested \$24.00
	Current \$22.84

Last Pay Change: 12 months ago  
Originally Hired: December 5, 2017  
Last Hired: December 5, 2017  
Seniority Date: December 5, 2017

Effective	Reason	Annual Salary	Job Code Average	Percent Change	Quartile
11.01.2018	Demotion	\$42,756.48	\$42,756.48	0.00%	
12.05.2017		\$44,538.00	\$44,538.00		

The e3 system will recognize if a manager is trying to assign an employee to the position for more FTE (weekly hours) than is available for the position at this moment and let the manager know the position is not available for the input weekly hours. The same acknowledgment is needed if the newly requested pay rate change is out of policy for any reason.

The manager will next be asked to select the employment status the employee will have in that position. The weekly hours will be pulled over from what the manager entered in the previous screen. e3 will account for the weekly hours requested and only present the available employment status to the amount of weekly hours input. **Note:** It will only pull relevant employment statuses to that position.

ORGANIZATIONAL CHART

**SELECT EMPLOYMENT STATUS**

Weekly Hours: 20

As Needed PRN 0-40 hours

Regular 64 0-37.5 hours

Temp employees 0.01-40 hours

Show All

Any required or helpful documents will be requested at the next screen prior to the manager's final review.

ORGANIZATIONAL CHART

**ATTACH SUPPORTING DOCUMENTS**

If there are any attachments you would like to add to this request, click the browse button below.

Browse

Back Continue

Finally, the manager will have a last review of all the information entered. After this request is finalized and submitted, the transfer request will follow the workflow path designated by your organization.

## Terminate Employee

You can terminate an employee from the organizational chart by right clicking on the employee and selecting Employee Details. Click the “Terminate Employee” link from one of the Employee Actions menus to launch the Termination Wizard. **Note:** that this request does not terminate the employee upon completion. This only starts the request for the termination. The actual termination is set by HR upon final termination review where they set the date and time for the employee to be terminated.

The first thing a manager will be prompted to do is confirm that they truly do wish to terminate the selected employee.

Finally, the manager will have a last review of all the information entered. After this request is finalized and submitted, the transfer request will follow the workflow path designated by your organization.

The manager will then select the date they wish the employee to be terminated on. After the date is selected, the manager will enter the exact time of day which an employee will be terminated and their system access as an active employee will turn off.

Then the manager will be asked to select the termination reason from the drop down list configured. The list will only contain termination reasons which have been labeled as voluntary, as involuntary terminations will be handled by the HR department. There is another drop down list below the reason where the manager will select if the employee is eligible for rehire.

Next, the manager will be asked to attach any required or helpful documentation to the termination request for the employee. If the employee gave notice before they terminated, the manager will then select ‘yes’ and enter in when the termination notice was given and when the employee will be working until. If there was no notice given, the manager can select ‘no’ and instead just enter the employee’s last day. The employee’s last day worked is a field HR will be able to edit as well during the termination review in case the last day worked is not what was expected.

Lastly, the manager will have a final step to review all of the information and entered before finalizing the request to then be reviewed by HR.

## Change Employment Status

Click the Change Employment Status link on the employee details pop up window, or right click on the employee's photo on the organizational chart and select Change Employment Status from the drop down.

The manager will first be asked to select when the effective date this status change should take place on. The manager sees the employee's current status and weekly hours and is asked to select the new status and weekly hour amount. For a guide, the manager sees a list of guidelines for each of the employment statuses below the weekly hour amount. Any necessary attachments and comments for the request will be attached at the bottom before finalizing this request and sending off along the workflow path.

**CHANGE EMPLOYEE'S STATUS**

Effective Date: 11/25/2019

Current Employment Status: R90 - Regular 72

New Employment Status: R80 - Regular 64

Current Weekly Hours: 36.00

New Weekly Hours: 30.00

Based on the Employment Status (Regular 64), Greg's new weekly hours must be at least 0.00 and less than 37.50.

Position	FTE	Employment Status
Greg Olsen	0.90	R90
HR Compliance Specialist, 2328	1.00	RFT

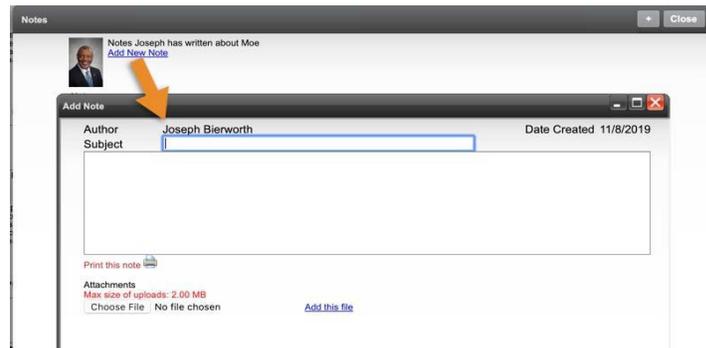
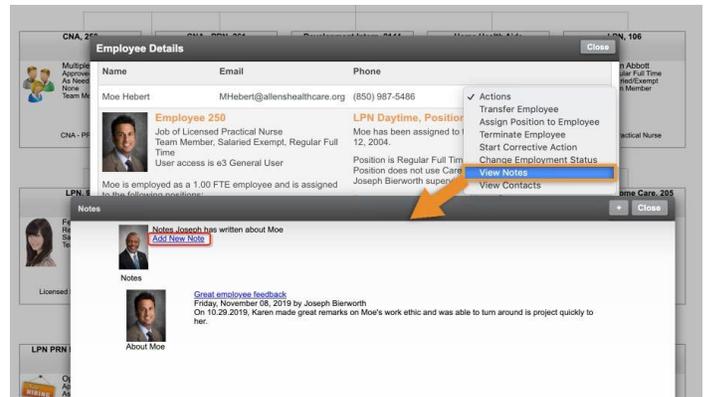
Employment Status	Minimum Weekly Hours - Greater than or equal to	Maximum Weekly Hours - Less than
FML - FMLA	0.00	0.00
ML - Military Leave	0.00	0.00
R80 - Regular 64	0.00	37.50
R90 - Regular 72	36.00	80.00
RFT - Regular Full Time	32.00	40.00
RPT - Regular Part Time	32.00	40.00

Supporting Documents

## View Employee Notes

The Employee Notes functionality is fairly open-ended for managers. Click the "View Notes" link on the employee details pop up window, or right click on the employee's photo on the organizational chart and select View Employee Notes from the drop down.

When adding a new note about an employee, the manager will enter a subject for the note, and then the notes or the attachment to save with the employee.



## View Employee Contacts

Click the View Contacts link on the employee details pop up window, or right click on the employee's photo on the organizational chart and select View Employee Contact Information from the drop down.

Through this view, a manager can see their employee's contact information in e3 such as their corporate/personal email and any entered telephone numbers. Managers may also have the ability to add new contact information for their employee depending on the security access set up by your organization.

**Contacts**

Amy Brockmeier's Contact Information

Add Contact

Amy's email address: abrockmeier@ahi.com

Amy's telephone numbers:  
✗ Business (813)289-4451 extension 1004 Public

Amy's friends and family numbers:  
 Emergency Contact  
✗ Sara Smith, Friend  
 Home (813)297-8768  
 Business (813)297-8768  
 Mobile (813)297-8768

# Chapter 4

## The e3 Statement

Depending on if your company has turned on this setting, the e3 statement is a semi-monthly email sent to employees and managers on the 1st and the 15th of each month. It includes information about credentials, performance management, and leave requests (depending on how your organization set up the e3 statement). To the right is an example of an e3 statement sent to a manager. It includes their own personal information in addition to their team's information regarding credential status, upcoming performance appraisals, and more.


SIGN IN TO 

**Suzie Cohen**  
HR Manager  
11 Years, 5 Months of Service

e3 Messenger  
**e3 Statement**

**My Statement as of Thursday, July 21st, 2016**

**My Credentials** Access My Credentials »

Drivers License	Missing	
National Provider Identification	Missing	
Senior Professional Human Resources	Expired!	Expired on 01/31/2013
Certified Urologic Nurse Practitioner	Expired!	Expired on 05/07/2016
Alcohol Test	Expired!	Expired on 07/09/2016
Drivers License	Up to date	Renews 04/25/2017
Advanced Cardiac Life Support	Up to date	Renews 11/01/2018
Registration Test	Up to date	Renews 07/12/2019
Flex Schedule Agreement	Up to date	Does not expire

**My Performance Management** Access My Evaluations »

You have no performance evaluations currently scheduled.

**My Leave Requests** Access My Leave Requests »

You have no pending or approved leave requests.

**My Team's Statement as of Thursday, July 21st, 2016**

**My Team's Credentials** Access My Team's Credentials »

Brock, Regina	Certified Nursing Assistant	Expires on 08/31/2016
Brown, Michael	Registered Nurse	Expires on 08/31/2016
Frieson, Charlotte	Cardiopulmonary Resuscitation	Expires on 08/07/2016
Frieson, Charlotte	Registered Nurse	Expires on 08/07/2016
Lauray, Kevin	Licensed Social Worker	Missing
Lauray, Kevin	Registration Test	Expired on 06/30/2016
Tarton, Rylan	Cardiopulmonary Resuscitation	Expired on 10/24/2014

**My Team's Performance Management** Access My Team's Evaluations »

Floresza, James	Probationary Appraisal	Due 10/27/2016
Frieson, Charlotte	Weekly Supervision	Past Due 07/17/2016

## Thank You

We are happy to welcome you as a new e3 user and hope that you thoroughly enjoy how the e3 experience has been designed to:

- Empower you as a manager
- Engage your employees, and
- Evolve your organization

Now you're ready to manage your team within e3! If you have questions, you can reach out to your e3 Administrator. You can also find helpful guides, videos, tutorials, FAQs, and more, available on our community site: [community.datis.com](http://community.datis.com).



## About DATIS

DATIS, a National Council Strategic Partner, provides a completely unified HR and Payroll software solution that empowers Health and Human Services organizations to better achieve their mission. DATIS connects employees, aligns departments, and transforms organizations by uniting all aspects of workforce management within a single platform that includes Payroll, Timekeeping, Recruiting, Benefits, Talent Management, Analytics, and more. Our end-to-end solution enables organizations to increase visibility, maximize resources, and make an impact.