 Human Resources

 AWARDS Implementation Requests Form

# Overview

As part of the AWARDS implementation process, agencies/continuums can make adjustments to the information collected during the entry and maintenance of employee Staff Information records within the Human Resources module. The work flow and settings for Staff Training records can also be configured. This document is intended to guide you through each of the available **Staff Information** and **Staff Training** options, and to provide you a form with which to request them.

## Request Form Instructions

To request that the human resources functionality be customized in your AWARDS database, do the following:

1. Discuss the available options with your AWARDS implementation team and/or any other relevant staff.
2. Complete this request form, including the **Requestor Information** and the **Request Details** for each option.
3. Save the completed form to your PC.
4. Email the completed form to your Implementation Consultant or to **requests@footholdtechnology.com**.

Once your request form has been received, we will review it carefully and the requested options will be deployed to your AWARDS database. We may contact you prior to deployment if, after reviewing your requests, we have any questions or concerns about your selections.

## Available Human Resources Options

To jump ahead to the information regarding a specific option, click it in the list below.

**Staff Information Records**

[Option 1 – **Available / Required Fields and Options**](#_Option_1_–_1)
[Option 2 – **Credentials – Authorization Credentials List**](#_Option_x_–_2)
[Option 3 – **Demographics – Ethnicity List**](#_Option_3_–)
[Option 4 – **Payroll – Benefits List**](#_Option_4_–)
[Option 5 – **Payroll – Leave Types List**](#_Option_5_–)
[Option 6 – **Work Role – Departments List**](#_Option_6_–)
[Option 7 – **Work Role – EEO Job Classifications List**](#_Option_7_–)

**Staff Training Records \***

[Option 8 – **Custom Training Topics List**](#_Option_x_–)
[Option 9 – **Training Cost Field**](#_Option_15_–)
[Option 10 – **Mandated Training Attendance Option**](#_Option_x_–_1)

* ***Tip:******\**** *While defined as “Human Resources” functionality for the purposes of this document, the location of the Staff Training feature in AWARDS varies based on a user’s permissions; specifically, based on those permissions it is available to users who have access from one or more of the following locations: Human Resources module, Services – Group module, AWARDS* Home *screen, and Calendar.*

# Requestor Information

**Customer Name:** [enter customer / database name here]

**Requestor Name:**  [enter your name here]

# Option 1 – Staff Information > Available / Required Fields and Options

**AWARDS Location:** Human Resources > Staff Information

**Enhancement Description:** This enhancement enables agencies to determine which fields and options are available on the staff information records used to record employee information in AWARDS. In addition, it allows specified fields and options to be set as required.

## Request Details

In this table click the **Display** checkbox for each field/option that should be included on staff information records in your AWARDS database. For each field/option you are choosing to display (or that is displayed by default), also click the corresponding **Required** checkbox if users should be prevented from saving the record until a value has been entered using that field/option. Each required field/option is displayed on the staff information page with a red asterisk (\*).

* ***Tip:*** *The staff information record for an employee must be completed before an AWARDS login can be created for him/her. Keep that in mind and use caution when specifying which fields/options are to be required, as it means that a login cannot be created unless/until those required pieces of data are all available and entered.*

|  |  |  |
| --- | --- | --- |
| **Info Type –** Field / Option | **Display** | **Make Required** |
| **Credentials** – Credential Expiration *(see also:* [*Option 2 – Authorization Credentials List*](#_Option_x_–_2)*)* | [ ]  | [ ]  |
| **Credentials** – Degree  | on by default | [ ]  |
| **Credentials** – Degree School | on by default | [ ]  |
| **Credentials** – Degree Year | on by default | [ ]  |
| **Credentials** – Highest Grade Level | on by default | [ ]  |
| **Credentials** – Languages | on by default | [ ]  |
| **Credentials** – License Type Code | on by default | [ ]  |
| **Credentials** – Medicaid Provider ID | on by default | [ ]  |
| **Credentials** – Medicare Provider ID | on by default | [ ]  |
| **Credentials** – National Provider Identifier | on by default | [ ]  |
| **Credentials** – Professional License # | on by default | [ ]  |
| **Demographics** – Agency Employee ID Number | [ ]  | [ ]  |
| **Demographics** – AWARDS Employee ID (read-only) | [ ]  | [ ]  |
| **Info Type –** Field / Option | **Display** | **Make Required** |
| **Demographics** – Birth Date | on by default | [ ]  |
| **Demographics** – Cell Phone | on by default | [ ]  |
| **Demographics** – Comments | [ ]  | [ ]  |
| **Demographics** – Driver Info – Agency Driver | [ ] turned on together | [ ]  |
| **Demographics** – Driver Info – Driver’s License # | [ ]  |
| **Demographics** – Driver Info – Driver’s License Effective Date | [ ]  |
| **Demographics** – Driver Info – Driver’s License Expiration Date | [ ]  |
| **Demographics** – Driver Info – Driver’s License State | [ ]  |
| **Demographics** – Emergency Contact Person / Phone | on by default | [ ]  |
| **Demographics** – Emergency Contact Relation | on by default | [ ]  |
| **Demographics** – Emergency Medical Information | on by default | [ ]  |
| **Demographics** – Ethnicity *(see also:* [*Option 3 – Ethnicity List*](#_Option_3_–)*)* | on by default | [ ]  |
| **Demographics** – Fax Number | [ ]  | [ ]  |
| **Demographics** – Gender | on by default | [ ]  |
| **Demographics** – Home City-State-Zip | on by default | [ ]  |
| **Demographics** – Home Phone | on by default | [ ]  |
| **Demographics** – Home Street Address | on by default | [ ]  |
| **Demographics** – IRS Exemptions | on by default | [ ]  |
| **Demographics** – Login Creation Date (read-only) | [ ]  | [ ]  |
| **Demographics** – Marital Status | on by default | [ ]  |
| **Demographics** – Middle Name | on by default | [ ]  |
| **Demographics** – Personal Email Address | on by default | [ ]  |
| **Demographics** – Social Security Number | on by default | [ ]  |
| **Demographics** – US Citizen / Country | on by default | [ ]  |
| **Demographics** – Work Email Address | on by default | [ ]  |
| **Demographics** – Work Phone | [ ]  | [ ]  |
| **Medical Info** – Annual TB Testing – Effective Date | [ ]  | [ ] required together |
| **Medical Info** – Annual TB Testing – Renewal Date | [ ]  |
| **Medical Info** – Annual TB Testing – Results | [ ]  |
| **Info Type –** Field / Option | **Display** | **Make Required** |
| **Medical Info** – Chest X-Ray – Date | [ ]  | [ ] required together |
| **Medical Info** – Chest X-Ray – Results | [ ]  |
| **Medical Info** – Hepatitis – Series 1 – Date | [ ]  | [ ] required together |
| **Medical Info** – Hepatitis – Series 1 – Tested | [ ]  |
| **Medical Info** – Hepatitis – Series 2 – Date | [ ]  | [ ] required together |
| **Medical Info** – Hepatitis – Series 2 – Tested | [ ]  |
| **Medical Info** – Hepatitis – Series 3 – Date | [ ]  | [ ] required together |
| **Medical Info** – Hepatitis – Series 3 – Tested | [ ]  |
| **Miscellaneous Info** – Code of Ethics Form Signed / Expiration Date | [ ]  | [ ]  |
| **Miscellaneous Info** – Training Dates | [ ]  | [ ]  |
| **Payroll** – Benefits Info – Eligible *(see also:* [*Option 4 – Benefits List*](#_Option_4_–)*)* | [ ] turned on together | [ ]  |
| **Payroll** – Benefits Info – Eligibility Date *(see also:* [*Option 4 – Benefits List*](#_Option_4_–)*)* | [ ]  |
| **Payroll** – Benefits Info – Enrolled *(see also:* [*Option 4 – Benefits List*](#_Option_4_–)*)* | [ ]  |
| **Payroll** – Benefits Info – Enrolled Date *(see also:* [*Option 4 – Benefits List*](#_Option_4_–)*)* | [ ]  |
| **Payroll** – Leave of Absence Type *(see also:* [*Option 5 – Leave Types List*](#_Option_5_–)*)* | [ ]  | [ ]  |
| **Work Role** – Department  *(see also:* [*Option 6 – Departments List*](#_Option_6_–)*)* | [ ]  | [ ]  |
| **Work Role** – EEO Job Class *(see also:* [*Option 7 – EEO Job Classification List*](#_Option_7_–)*)* | [ ]  | [ ]  |
| **Work Role** – Job Title | on by default | [ ]  |
| **Work Role** – Time Off Approval Supervisor | on by default | [ ]  |
| **Work Role** – Time Sheet Data Supervisor | on by default | [ ]  |

(employee.w: cfg-hr-fields) | (employee.w: cfg-required-fields) | (employee.w: cfg-medical-fields)

# Option 2 – Staff Information > Credentials – Authorization Credentials List

**AWARDS Location:** Human Resources > Staff Information > Credentials tab

**Enhancement Description:** This enhancement enables agencies to determine which credentials to track for staff. For each credential type specified here, a **Credential Name** check box and **Credential ID** field are available on the Staff Information record’s Credentials tab, as shown here. (An optional **Credential Expiration** field can also be displayed for each, using [Option 1](#_Option_1_–_1).)

* ***Tip:*** *If your agency has chosen to use the AWARDS BillingBuilder functionality, this enhancement helps determine staff credential criteria for billing purposes.*

## Request Details

|  |
| --- |
| **Setting** |
| [ ]  No, we will NOT be tracking authorization credentials | [ ]  Yes, we WILL be tracking authorization credentials. Use this list:[enter list here] |

(entcert.w: cfg-credentials-list)

# Option 3 – Staff Information > Demographics – Ethnicity List

**AWARDS Location:** Human Resources > Staff Information > Demographics tab

**Enhancement Description:** This enhancement enables agencies to determine the selections found in the **Ethnicity** drop-down list on the Demographics tab of staff information records. By default the Equal Employment Opportunity (EEO) ethnicity list is used. You can choose to implement this default list, or your own custom list.

## Request Details

|  |  |
| --- | --- |
| **Default List** | **Custom List** |
| [ ]  Use the **default (EEO)** ethnicity list.White (not Hispanic or Latino)Black or African American (not Hispanic or Latino)Hispanic or LatinoAsian (not Hispanic or Latino)American Indian / Alaskan Native (not Hispanic or Latino)Native Hawaiian or Other Pacific Islander (not Hispanic or Latino)Two or More Races (not Hispanic or Latino) | [ ]  Use this **custom** list:[enter list here] |

(employee.w: cfg-ethniclist)

# Option 4 – Staff Information > Payroll – Benefits List

**AWARDS Location:** Human Resources > Staff Information > Payroll tab

**Enhancement Description:** When benefits-related fields/options are included on the staff information record (see [Option 1](#_Option_1_–_1)), the list of benefits for which those fields/options are available must be specified. Each benefit will display as a separate row in a “Benefits” section of the staff information record’s **Payroll** tab. Those rows are each populated with the benefits-related fields/options specified in [Option 1](#_Option_1_–_1).

In the example at right, the benefits list is comprised of the defaults – Medical, Dental, and Retirement – and all available benefits fields/options have been turned on in [Option 1](#_Option_1_–_1).

## Request Details

|  |  |
| --- | --- |
| **Default List** | **Custom List** |
| [ ]  Use the **default** benefits list:MedicalDentalRetirement | [ ]  Use this **custom** list:[enter list here] |

(employee.w: cfg-employee-benefits)

# Option 5 – Staff Information > Payroll – Leave Types List

**AWARDS Location:** Human Resources > Staff Information > Payroll tab

**Enhancement Description:** When “Leave of Absence Type” is set for inclusion as an option on staff information records (see [Option 1](#_Option_1_–_1)), agencies can document the type of leave taken when a staff member is placed on a leave of absence, as indicated with the “On Leave” payroll type (as shown at right). The selections available in the leave of absence type list is configurable. You can choose to implement the default list, or your own custom list.

## Request Details

|  |  |
| --- | --- |
| **Default List** | **Custom List** |
| [ ]  Use the **default** leave types list:MedicalPersonalEducationalSuspensionOther | [ ]  Use this **custom** list:[enter list here] |

(employee.w: cfg-leave-of-absence)

# Option 6 – Staff Information > Work Role – Departments List

**AWARDS Location:** Human Resources > Staff Information > Work Role tab

**Enhancement Description:** When **Department** is included as an option on staff information records (see [Option 1](#_Option_1_–_1)), the departments listed in that drop-down must be specified by your agency.

* + ***Note:*** *If your agency has chosen to use “Department” as a filter for staff training records, this list is applied to that filter as well.*

|  |
| --- |
| **Setting** |
| [ ]  We will NOT be recording department information. | [ ]  Yes, we WILL be tracking department information. Use this list:[enter list here] |

(employee.w: cfg-departments) | (training.w: cfg-staff-in-depts)

# Option 7 – Staff Information > Work Role – EEO Job Classification List

**AWARDS Location:** Human Resources > Staff Information > Work Role tab

**Enhancement Description:** When **EEO Job Class** is included as an option on staff information records (see [Option 1](#_Option_1_–_1)), the classifications listed in that drop-down are configurable. You can choose to use the default list – populated with Equal Employment Opportunity (EEO) selections, or a custom list.

* + ***Note:*** *Regardless of which list you choose to use, the option label will remain “EEO Job Class.”*

|  |  |
| --- | --- |
| **Default List** | **Custom List** |
| [ ]  Use the **default EEO** classifications list:Executive/Senior Level Officials and ManagersFirst/Mid Level Officials and ManagersProfessionalsTechniciansSales WorkersAdministrative Support WorkersCraft WorkersOperativesLaborers and HelpersService Workers | [ ]  Use a **custom** classifications list:[enter list here] |

(employee.w: cfg-job-class)

# Option 8 – Staff Training > Custom Training Topics List

**AWARDS Location:** Various > Staff Training

**Enhancement Description:** Allows for the customization of the checkboxes list available in the “Check Topics Covered” section of staff training records. (If a topic previously available for selection is removed from the list at any point, that topic is retained when viewing related reports but is no longer displayed during record data entry.)

## Request Details

|  |  |
| --- | --- |
| **Default List** | **Custom List** |
| [ ]  Use the **default** topics list:  | [ ]  Use this **custom** list:[enter list here] |

(training.w: cfg-train-topics)

# Option 9 – Staff Training > Training Cost Field

**AWARDS Location:** Various > Staff Training

**Enhancement Description:** Adds a **Cost** field to staff training records, allowing for the capture of training costs. (A value entered into this field is informational only and is not used in any calculations elsewhere in AWARDS.)

## Request Details

|  |
| --- |
| **Setting** |
| [ ]  Do NOT turn on the **Cost** field |
| [ ]  ADD the **Cost** field to all Staff Training records |

(training.w: cfg-cost-field)

# Option 10 – Staff Training > Mandated Training Attendance Option

**AWARDS Location:** Various > Staff Training

**Enhancement Description:** By default when scheduling attendees for staff trainings, a **Scheduled** checkbox is displayed to the left of each staff member’s name, as shown in the top image at right. Checking the checkbox corresponding to a staff member indicates that he/she is scheduled to attend that event. A **Check All** link is also available for easy selection of all staff.

With this enhancement – shown in the second image - the **Scheduled** checkboxes are replaced with both “Scheduled” and “Mandated” selections to distinguish whether each attendee is scheduled to attend the training, or required to attend, respectively. In addition, the **Check All** link is replaced with the same selection list and a **Set** button that can be used to apply a single selection to every staff member, overriding any individual selections previously made. Please note that when this enhancement is requested the **Scheduled** selection on any existing staff training records is automatically switched over to the new equivalent selection in the drop-down.

## Request Details

|  |
| --- |
| **Setting** |
| [ ]  KEEP the **default** scheduled checkboxes |
| [ ]  REPLACE the checkboxes with the **scheduled/mandated** selection list |

(training.w: cfg-show-mandated)