Employee Profile

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Employee Profile

The *Employee Profile* enables you to access a variety of information related to a specific employee. By accessing the tab groups within a specific profile, you can also modify information for the selected employee.

You can access the *Employee Profile* by selecting MENU > **Administrative Access** > **Employee** and then selecting **Employee Profile** under *Features*. Then, begin entering the employee's name in the Employee search field near the top left of the screen to locate the *Employee Profile* you wish to view. Alternatively, you can select MENU > **Administrative Access** > **Employee** and then select **Employee List** under *Features*. Then, click the icon to the left of the employee you wish to view.

Listed below are the tables containing the sub-tabs for each tab group on the *Employee Profile*.

- General
- Applicant Tracking
- Asset
- Audit History
- Benefit Management
- Federal Reporting
- Online Form
- Organization Chart
- Payroll
- Position
- Process Management
- State Reporting
- Substitute Tracking
- Time Off
- Time Tracking

General

The following table provides information regarding the sub-tabs located under the *General* tab group.

Sub-Tab	Description

Profile	Displays employee demographic information and details, such as their name and its pronunciation, as well as the race and ethnicity information for the employee.
Addresses	Displays the addresses listed for the employee. You can also see if an address is used for another user in the system.
Phone/Email	Displays the phone numbers and email addresses listed for the employee.
Aliases	Displays any additional names the employee uses. For example, the employee's maiden name may be an alias.
Emergency Contacts	Displays the emergency contact information for the employee.
Photo	Displays a photo of the employee.
Dependents	Displays the employee's dependents as used for Affordable Care Act (ACA) reporting, if applicable.
Notes	Displays the notes attached to the employee.
Employment	Displays the Employment information for the employee. For example, you can view the employee's Start Date, and if the employee is no longer employed or changed employment status, you see the employee's End Date and Termination.
Years Experience	Displays the Years of Experience for the employee. The options that display are based on the options chosen in the *System Configuration* of the *Employee* module.
Veteran Status	Displays the previous military experience information for the employee, if applicable.
Certifications	Displays the Certifications the employee has. You can also view the certification details.
Degrees	Displays the Degrees the employee holds. You can also view the Programs of Study for each degree.
Credits	Displays information about the Credits the employee has attempted and earned towards a degree. This can be used to determine how close the employee is to completing a degree.
Vaccinations	Displays information regarding existing vaccines and vaccination waivers for the employee.
Wellness Screenings	Displays information regarding current and historical wellness screenings for the employee.

Applicant Tracking

The following table provides information regarding the sub-tab located under the *Applicant Tracking* tab group.

Sub-Tab	Description
Applications	Displays the applications the employee submitted through the *Applicant Access* portal and includes information including the application submitted date, the job title, the type, the status of the application, and the attachments included in the application.

Asset

The following table provides information regarding the sub-tab located under the *Asset* tab group.

Sub-Tab	Description
Asset Location Transactions	Displays asset location transactions that are associated with the employee. The transaction displays information such as the Check in Time, asset description, Tag Number, Asset Number, Item, Item Category, building, Room Number, room description and any attachments. For example, if the employee checks out a company car, there would be an asset location transaction indicating that information.

Audit History

The following table provides information regarding the sub-tabs located under the *Audit History* tab group.

Sub-Tab	Description
ACH Accounts	Displays the ACH Account history for the employee and the change history for the account, which includes the changes made and the user who made the changes.
Address	Displays the address history for the employee and the change history for the address, which includes the changes made and the user who made the changes.
Assignments	Displays the Assignment history for the employee and the change history for the assignment, which includes the changes made and the user who made the changes.
Assignment Pay Types	Displays the Assignment Pay Type history for the employee and the change history for the assignment pay type, which includes the changes made and the user who made the changes.
Employee Benefits	Displays the benefit history for the employee and the change history for the Benefits, which includes the changes made and the user who made the changes.

Employee Deductions	Displays the deduction history for the employee and the change history for the Deductions, which includes the changes made and the user who made the changes.
Employee Time Off Types	Displays the Employee Time Off Type and time off transaction history for the employee, which includes the changes made and the user who made the changes.
Payroll Timesheets	Displays the Assignment Pay Type and the timesheet audit history for the employee, which includes the changes made and the user who made the changes.
Emergency Contacts	Displays the emergency contact history for the employee and the change history for the contact, which includes the changes made and the user who made the changes.
Phone/Email	Displays the phone number and email history for the employee and the change history for the phone number and email, which includes the changes made and the user who made the changes.
Profile	Displays general profile history for the employee and the change history for the profile, which includes the changes made and the user who made the changes.
Tax Information	Displays general tax information history for the employee and the change history for the information, which includes the changes made and the user who made the changes.
Time Tracking Schedules	Displays schedule and schedule transaction history for the employee and the change history, which includes the changes made to an employee's schedule and schedule transactions as well as the users who made the changes.

Benefit Management

The following table provides information regarding the sub-tabs located under the *Benefit Management* tab group.

Sub-Tab	Description
Benefits Paid	Displays details about each benefit paid by the employer, including the Check Date, Benefit, and Amount.
Bill Detail	Displays details for each Benefit Management Bill associated with the employee, including the year and month, Plan, Vendor, and amount.
Current Elections	Displays details for the current Employee Plan Enrollment elections for the employee, including the Coverage Start and End Date, Payment Start and End Date, Plan, Sub-Plan Benefit Group, Coverage, Deduction/Benefit Schedule, total premium collected, and any waived employee plans.

Deductions Paid	Displays details about each deduction paid by the employee, including the check date, Deduction, and Amount.
Employee Benefit Month	Displays details for each employee benefit month, such as the Benefit Group employees belong to and their benefit Full-Time Equivalency (FTE) amount for that month.
Employee Plan Enrollment	Displays the benefit management plans associated with the employee, including the Coverage Start and End Date, Payment Start and End Date, Plan, current Coverage, and Deduction/Benefit Schedule. For the highlighted plan, additional details display for each month the employee will pay for coverage, such as the coverage description, and Benefit Group.
Enrollment Request	Displays details of special enrollment requests submitted by the employee such as the date the request was submitted, the event date, status of the request, qualifying life event, and attachments.
Waived Employee Plan	Displays details of waived employee plans, including the date and time the Coverage election was submitted, the Plan that was waived, the date and time the elections were approved and by whom, as well as the Coverage Start and End Date for the waived employee plan.

Federal Reporting

The following table provides information regarding the sub-tabs located under the *Federal Reporting* tab group.

Sub-Tab	Description
ACA	Displays the checkbox for Employer Printed 1095 and the Affordable Care Act (ACA) extract information for the employee. If the box for **Employer Printed 1095** is checked, it cannot be unchecked. Under the *ACA Individual PDFs* heading, you can open the extract record to view more information and print the employee's 1095C form if the PDF files have been made available.
ACA-B Origin of Coverage	Displays the employee's Affordable Care Act (ACA) Origin of Coverage information for reporting to the government. You can also view if the employee should be reported as a covered individual, if their ACA-B coverage has been terminated, and any individuals covered under the employee's plan, such as the employee's dependents.

ACA-C Offer of Coverage	Displays the employee's Affordable Care Act (ACA) Offer of Coverage information for reporting to the government, along with the employee's Safe Harbor ID. You can also view the employee's covered individuals for health insurance, such as the employee's dependents.
BLS Faculty	Indicates whether the employee was flagged as Bureau of Labor Statistics (BLS) Faculty.
EEOC	Displays the Equal Employment Opportunity Commission (EEOC) report information by employer, report type, and Fiscal Year. You can indicate whether the employee is EEOC Full Time. You can also open the record to view the EEOC employee details, including general and employment information, such as gender, race, and Primary Position.
W2/W2C	Displays the employee's W2/W2C extract information, including the checkbox for **Employer Printed W2**. You can only uncheck the box for **Employer Printed W2** if the box for **Third Party Used for Employee W2 Election** is checked in the *District Configuration* of the *Federal Reporting* module. You can open the W2 record to see more information and print employee W2/W2C forms if the PDF files have been made available.
1099-R	Displays the employee's 1099-R extract information, including the checkbox for **Employer Printed 1099-R**. You can modify the employee's 1099-R Distribution codes, as well as open the employee's existing 1099-R records.

Online Form

The following table provides information regarding the sub-tab located under the *Online Form* tab group.

Sub-Tab	Description
Online Forms	Displays all online forms the employee has started or completed, as well as any notes associated with the forms.

Organization Chart

The following table provides information regarding the sub-tabs located under the *Organization Chart* tab group.

Sub-Tab	Description
Accounts Payable	Displays the employee's Position Distributions, the associated individuals responsible for approving the employee's Expense Reimbursements as determined by

	the Organization Chart, and any individuals who directly report to the employee.
Time Off	Displays the employee's Position Distributions, the associated individuals responsible for approving the employee's time off requests as determined by the Organization Chart, and any individuals who directly report to the employee.
Time Tracking	Displays the employee's Position Distributions, the associated individuals responsible for approving the employee's Timesheet Weeks as determined by the Organization Chart, and any individuals who directly report to the employee.
Time Tracking Schedules	Displays the employee's Position Distributions, the associated individuals responsible for approving the employee's time tracking schedule as determined by the Organization Chart, and any individuals who directly report to the employee.

Payroll

The following table provides information regarding the sub-tabs located under the *Payroll* tab group.

Sub-Tab	Description
Benefits	Displays the Benefit codes attached to the employee.
Deductions	Displays the Deduction codes attached to the employee.
Assignment Pay Types	Displays the Assignment Pay Types attached to the employee. You can also view any Deductions and Benefits attached to the assignment pay types.
Tax Information	Displays the W4 tax information for the employee. For example, you can view the Federal Allowance as well as the State Allowance.
ACH Accounts	Displays the Automated Clearing House (ACH) Accounts that can be used for payroll or accounts payable payments to the employee.
Check History	Displays past paychecks received by the employee. You can open a Check Transaction to view additional details about the payment to the employee.
Pay Transactions	Displays every Pay Transaction that was processed through a Payroll Run for the employee.
Timesheets	Displays every Payroll Run where the employee has a Timesheet Week attached in the *Payroll* module. This timesheet is a unique combination of payroll run, Pay Type code, Assignment Type code, and building. Multiple timesheets can display for the same payroll run if the employee has multiple unique combinations of the listed codes.

Calendar YTD	Displays paycheck information for each calendar year using the check date from the employee's payroll. You can also view the pay, Deduction, and Benefit details for each calendar year.
Fiscal YTD by Check Date	Displays paycheck information for each Fiscal Year using the check date from the employee's payroll. You can also view the pay, Deduction, and Benefit details for each check date in the fiscal year. You can insert a column for Fiscal YTD by Check Date on related browse screens or reports. For example, you can add a column to the *Employee Benefits* browse screen on the *Benefits* sub-tab of the *Payroll* tab group in the *Employee Profile* to view the total number of fiscal year to date (YTD) payments made based on the Check Date. This data can also be pulled into reports in the *Reporting* module.
Fiscal YTD by Position Year	Displays paycheck information for each Fiscal Year. This is based on the employee's checks earned during a Position fiscal year of a specific Assignment. You can also view pay, Deduction, and Benefit details for each fiscal year. You can insert a column for Fiscal YTD by Position Year to related browse screens or reports. For example, you can add a column to the *Employee Benefits* browse screen on the *Benefits* sub-tab of the *Payroll* tab group in the *Employee Profile* to view the total number of fiscal year to date (YTD) payments made in the position year. This data can also be pulled into reports in the *Reporting* module.
Taxable Life Insurance	Displays the employee Taxable Life Insurance setup that is necessary for calculating the taxable life insurance benefit.
Deduction Catch Ups	Under the *Deduction Catch Up Totals* heading, records display the total amount of each deduction catch up occurrence that results from zeroing negative net payroll checks, sorted by Deduction code. Under the *Deduction Catch Ups* heading, each deduction catch up record displays creation details including the date, time, Payroll Run description, and amount owed by the employee. As the deduction catch up records are processed in payroll runs, amounts will populate in the *Employee Paid* column.
Repayment Plans	Under the *Repayment Plans* heading, records display repayment plan information for the employee, including the amount the employee owes, the Fiscal Year for the repayment plan, and information related to the Assignment. Under the *Employee Repayment Plan Details* heading, records display any payment transactions or additional debts accrued.
TSA Consulting Status	Displays the TSA Consulting Status setup information that is necessary for calculating the consulting retirement benefit. The TSA Consulting Status record is a connector between the TSA Employment Status and the *Employee Profile* so that information can be reported within TSA reports. This sub-tab only displays if the **3rd Party Retirement Vendor** is set to TSA Consulting within the *District Configuration* of the *Payroll* module.

Position

The following table provides information regarding the sub-tabs located under the *Position* tab group.

Sub-Tab	Description
Assignments	Displays the Assignment and other related information for the employee's Position. You can also view the current Position Distributions and the details of the Assignment, which includes details such as the Start Date and End Date.
Placements	Displays the employee's Placement on a Matrix, which is used for calculating the pay for the employee's assignment. If the employee's pay is not calculated on a matrix, this area is empty.
Position Type Totals	Displays the employee's current total Full-Time Equivalency (FTE) from their Assignments associated with each Position Type. This also displays the current pay total for all assignments associated with the employee's position types.
Contract Status	Displays employee contract tracks and what contract status the employee has based on where their employment is in the contract track.
Contract Letters	Displays employee contract letters including contract letters that have expired.
Limited Position Distributions	Displays employee records the employee has limited access to based on their position. This includes items such as the Position Type, Assignment, building, FTE Group Code, Department, and Budgeted FTE.

Process Management

The following table provides information regarding the sub-tab located under the *Process Management* tab group.

Sub-Tab	Description
Process Instances	Displays the existing process instances for employees who oversee a process. You can see the process name, process status, the date the process was initiated and completed, whether the process has overdue steps, the steps completed, and a process description display for each process instance record.

State Reporting

The following table provides information regarding the sub-tabs located under the *State Reporting* tab group.

Sub-Tab	Description
Fiscal Year	Displays each fiscal year with the number of workdays and paid days for the employee for each year.
CACTUS	Displays the Comprehensive Administration of Credentials for Teachers in Utah Schools (CACTUS) record of whether the employee is a citizen of the United States.
Retirement - AUREUS	Displays the employee's Advanced Utah Retirement End User System (AUREUS) retirement records and employment changes.
Retirement - URS	Displays the employee's retirement information for state reports, which includes the employee's Utah Retirement System (URS) status and contribution fund details.

Substitute Tracking

The following table provides information regarding the sub-tabs located under the *Substitute Tracking* tab group. The first two sub-tabs listed in the table below may remain empty unless the employee is a substitute.

Sub-Tab	Description
Substitute Pay Scales	Displays the Pay Scale that is used to calculate the employee's pay for time working as a substitute. You can also view the corresponding Pay Scale Class.
Substitute Transactions	Displays any Substitute Transactions recorded when the employee worked as a substitute, as well as the Absence Type. You can also view the Pay Amount the substitute employee was compensated for working.
Substitute Coverage	Displays any approved Time Off Transactions for the employee. You can also view the corresponding substitute transactions to see who substituted for that particular employee.

Time Off

The following table provides information regarding the sub-tabs located under the *Time Off* tab group.

Sub-Tab	Description
Time Off Types	Displays the employee's Time Off Types and the corresponding time off transactions for the time off type.

Time Off Transactions	Displays existing Time Off Transactions for the employee.
Time Off Payouts	Displays existing time off payouts for the employee.

Time Tracking

The following table provides information regarding the sub-tabs located under the *Time Tracking* tab group.

Sub-Tab	Description
Time Tracking Setup	Displays the employee time tracking setup which can include the Employee General Time Tracking Group, Employee Comp Time Time Tracking Group, Employee Overtime Time Tracking Group, Employee Rounding Time Tracking Group, and the employee schedule time tracking group.
Schedule	Displays the weekly or monthly schedule for the employee.
Unsubmitted Timesheet Weeks	Displays the unsubmitted timesheet weeks for the employee which enables payroll staff to review and submit an employee's Timesheet or open it to view any manual edits the employee made to their timesheet throughout the week. Additionally, payroll staff can view the approval process, the Time Transactions, and the timesheets included in payroll.
Timesheet Week History	Displays the employee's submitted timesheet weeks. You can view the start date and end date for each timesheet week, as well as the total paid submitted hours and the comp time requested. You can also view the status for each timesheet week and whether the timesheet week was manually edited or has any attachments. Additionally, depending on the status of the timesheet week, you can approve, deny, delete, or reset approvals for the timesheet week, or move it to history. You can also open each record to view the submitted timesheet details, approval process, Time Transactions, and timesheets included in payroll.