

NEOGOV

HR Admin Training Guide

Last revised: 6/29/2023

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Preface

By making any change to this document, you agree that modifications and unchanged portions of the document are your sole responsibility, comply with legal and regulatory requirements, comply with the terms of the Service Agreement between you and NEOGOV, and you further agree to update the document as product changes are released reflecting the author of the changes.

Overview

This document provides a high-level overview of the Core HR functions in NEOGOV for HR Administrators. Using this guide, your implementation consultant will help you understand how to maintain your organization's HR functions.

The table below provides a link and a brief description for each section in this document.

Section	Description
Employee Information	This section describes how to maintain employee profile, employment, and assignment records.
HR Actions	This section describes how to perform actions such as hiring and terminating employees.
HR Functions	This section describes HR-specific functions such as personnel actions and security.
Org Structure	This section describes how to maintain your org structure after initial import.
Salary Information	This section describes how to maintain all aspects of your organization's salary structure.
Analytics and Reporting	This section provides a list of standard reports included in the product and describes how to use the Report Builder to run customer reports.

Employee Information

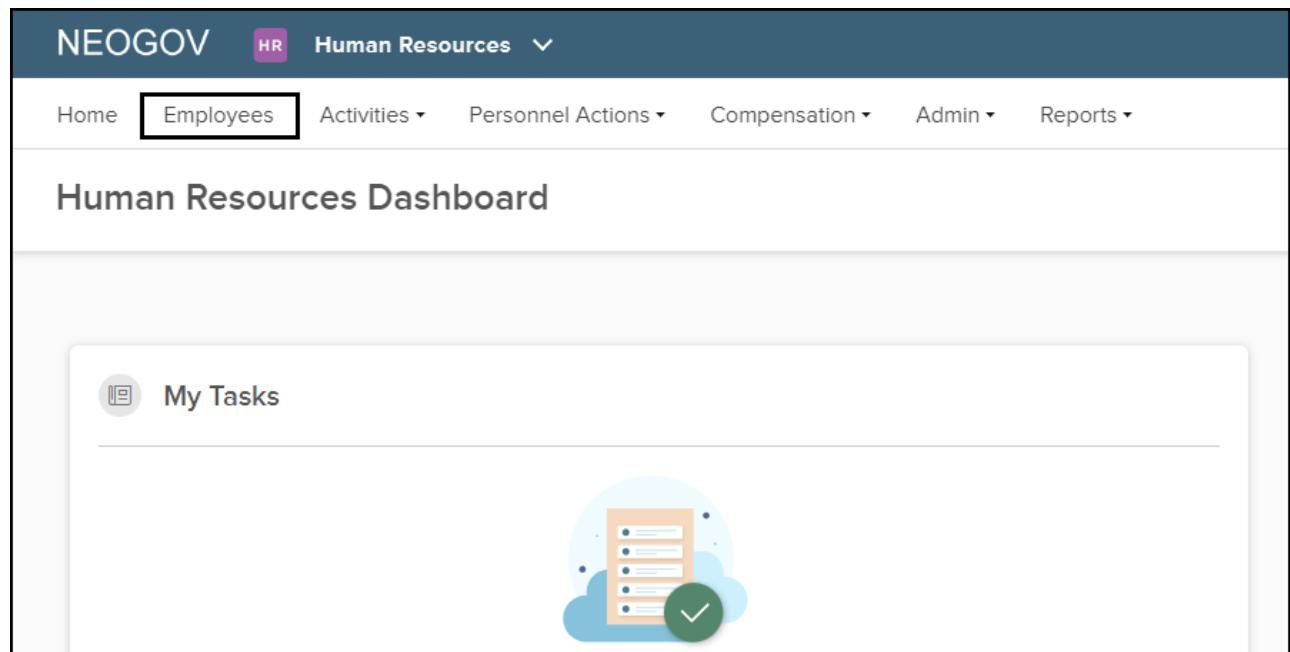
Employee information is all data relevant to an employee’s status within your organization including profile, employment records, and assignments.

Employee Profile

Use the **Employees** screen to view and maintain employee information for your organization.

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status
10		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active
12		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active
13		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active



1. From the **Human Resources Dashboard**, click **Employees**.



2. Search for the employee using any field.
3. Click the pencil icon (**Edit record**) to see the employee’s information.

Employees

Filter by: Active ▾


Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status	
10		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active	 3
12		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active	

On the employee’s information screen, you have access to the **Personal**, **Assignments**, **Contacts**, **Time Off**, and **Property** tabs.

Personal Tab


On the **Personal** tab, you can maintain personal information related to an employee.

← Back To Employee list

 Executive Assistant
Administration

Personal Assignments Contacts Pay History Time Off Direct Deposit


Personal info

 **Basic Info** Edit

Person Human

Gender: Nonbinary

Date of Birth: 05-Jul-1992

S.S.N.: XXX-XX-5555 

Language: English

Alt. Language: N/A

Ethnicity: N/A

[View more](#)

Assignments Tab

Use the **Assignments** tab to maintain all assignments for an employee.

← Back To Employee list

Executive Assistant Administration

Personal **Assignments** Contacts Pay History Time Off Direct Deposit Tax Withholdings Tax Forms Benefits Property IPEDS Deductions Earnings

ACTIVE

PRIMARY Primary Edit Delete Wage Rate **N/A** Bi-weekly

Start date 08/01/2022 Group FULL TIME
 Position Title Executive Assistant Unit NON_UNION
 Position Code 101 Department ADMIN
 Job Title Executive Assistant Location LOCATION1
 Job Code 101

> See more details

Add Assignment

ACTIVE

PRIMARY Primary Edit Delete Wage Rate **N/A** Bi-weekly

Start date 08/01/2022 Group FULL TIME
 Position Title Executive Assistant Unit NON_UNION
 Position Code 101 Department ADMIN
 Job Title Executive Assistant Location LOCATION1
 Job Code 101

> Hide Details

Details Compensation Employee Status Additional Info Distributions Premiums

Assignment Details

Position	101 - Executive Assistant	Job #	101	ACA Category	N/A
Position Start Date	07/29/2022	Job Title	Executive Assistant	ACA Override	N/A
Group	FULL TIME	Unit	NON_UNION	Jurisdiction Code	Fargo, ND, USA, Cass, 38-017-1028945

You can add or edit an assignment.

ACTIVE

PRIMARY Primary Edit Delete Wage Rate **N/A** Bi-weekly

Start date 08/01/2022 Group FULL TIME
 Position Title Executive Assistant Unit NON_UNION
 Position Code 101 Department ADMIN
 Job Title Executive Assistant Location LOCATION1
 Job Code 101

> See more details

Add Assignment

Add Assignment

Cancel Save

* Assignment Name

Prime Assignment

An existing assignment is selected as the primary assignment. Only 1 primary assignment can be assigned. To change the primary assignment, uncheck the existing primary assignment before setting a new assignment as primary.

* Start Date Calendar icon

End Date Calendar icon

Next Review Date Calendar icon

Wage Process Date Calendar icon

* Type Dropdown arrow

* Status Dropdown arrow

Edit Assignment

Cancel Save

* Assignment Name

Prime Assignment

One assignment must be marked as primary at all times. Since this is currently the only active assignment associated with this employee, this value cannot be modified.

* Start Date Calendar icon

End Date Calendar icon

Next Review Date Calendar icon

Wage Process Date Calendar icon

* Type Dropdown arrow

* Status Dropdown arrow

On the modal, you can maintain job information including **Compensation, Employee Status, Distributions, and Premiums.**

You are viewing the effective record of 08/01/2022 Record 2 of 2

[Details](#)
[Compensation](#)
[Employee Status](#)
[Additional Info](#)
[Distributions](#)
[Premiums](#)

* Position

* Position Start Date

* Group

* Works in Location

Depending on the employee's assignment setup, NEOGOV labels the **Primary** and secondary assignments. You can delete any assignment except the **Primary** one.

PRIMARY Primary Edit Delete

Start date	08/01/2022	Group	FULL TIME	Wage Rate
Position Title	Executive Assistant	Unit	NON_UNION	N/A
Position Code	101	Department	ADMIN	Bi-weekly
Job Title	Executive Assistant	Location	LOCATION1	
Job Code	101			

[> See more details](#)

CITY ASSESSOR Effective 03/31/2023 Edit Delete

Start date	04/03/2023	Group	EXEMPT	Wage Rate
Position Title	City Assessor	Unit	NON_UNION	N/A
Position Code	102	Department	ASSESS	Bi-weekly
Job Title	City Assessor	Location	LOCATION1	
Job Code	102			


[> See more details](#)

Add Assignment

Contacts Tab


On the **Contacts** tab, you can maintain information like emergency contacts and beneficiaries.

← Back To Employee list

 Executive Assistant
Administration

Personal Assignments **Contacts** Pay History Time Off Direct Deposit Tax Withholdings

Emergency Contact(s)

 Emergency Contact(s) + Add

You have not added an Emergency Contact.

+ Add Emergency Contact


Time Off Tab

The **Time Off** tab is view-only and displays an overview of the balance remaining in an employee's leave policy. You can edit this information using the **Time and Attendance** product.

← Back To Employee list


Person Human
Executive Assistant
Administration

Personal Assignments Contacts Pay History **Time Off** Direct Deposit Tax Withholdings Tax Forms Benefits Property



FMLA
0.00
Current Balance

[View more details →](#)




SICK
0.00
Current Balance

[View more details →](#)

Upcoming Time Off History

Planned Date(s)	Type	Hours
No records available.		

« < > » 15 items per page



FMLA
0.00
Current Balance

[View more details →](#)

Family Medical Leave ×

Balances

STARTING BALANCE	EARNED THIS YR	TAKEN THIS YR	CURRENT BALANCE
0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs

History

No data.

Property Tab

On the **Property** tab, you can assign and maintain equipment for an employee.

← Back To Employee list

Executive Assistant Administration

Personal Assignments Contacts Pay History Time Off Direct Deposit Tax Withholdings Tax Forms Benefits **Property**

The employee has no Property

Add new

Add new Property

* Property
Laptop

* Type
Not Specified

* Issue Date
04/03/2023

Return Date
05/29/2023

Description
Temporary loan while primary laptop is under repair.

Cancel Save

Property

Add new

Active Inactive (1)

LAPTOP

Issue date: 04/03/23 • Return Date: 05/29/23

Not Specified

Temporary loan while primary laptop is under repair.

Employment Records

Use the **Employment** tab of the **Employees** screen to view and maintain the employment record for an employee, such as hire and termination.

Employees

Filter by: Active

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status	
Q Search	Q Search	Q Search	Q Search	Q Search	Q Search	Q Search		
000		100 - City Administrator	ADMIN - Administration	NON_UNION	EXEMPT	TEST REL	Active	

← Back To Employee list

City Administrator
Administration

Assignments **Employment** Benefits Pay History Direct Deposit Tax Withholdings Tax Forms

Employment Records

ACTIVE

Employee						<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px; color: red; text-align: center;">Terminate</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px; text-align: center;">Edit</div>
Hire Date: 02/08/2023						
Original Hire Date	12/01/2020	Multiple Family Support	N/A	Test N	N/A	
Seniority Date	02/08/2023	Test A	N/A	Test O	N/A	
First Work Date	N/A	Support in arrears	N/A	PERA Exclusion Required	N/A	
Last Work Date	N/A	Test B	1.000000			
ACA Stability Date	N/A	Test C	N/A			

1. From the **Human Resources Dashboard**, click **Employees**.

NEOGOV HR Human Resources

Home **Employees** Activities Personnel Actions Compensation Admin Reports

Human Resources Dashboard

2. Click the pencil icon (**Edit record**) for the desired employee to view either record.

Status	
Active	

HR Actions

As an HR Admin, you can perform a variety of actions including hire/rehire, terminate, and bulk manager changes.



If you are a TMS customer, you have additional ways to hire, rehire, and terminate employees. Ask your implementation consultant for the **New Hires/ReHires Guide**.


Quick Hire

Use the **Quick Hire (IEQH)** screen to quickly hire an employee.

1. From the **Human Resources Dashboard**, click **Activities** > **Quick Hire**, or search for **IEQH** in the **Page Code** field.



2. Complete the required fields (red asterisk), then click **Save**.



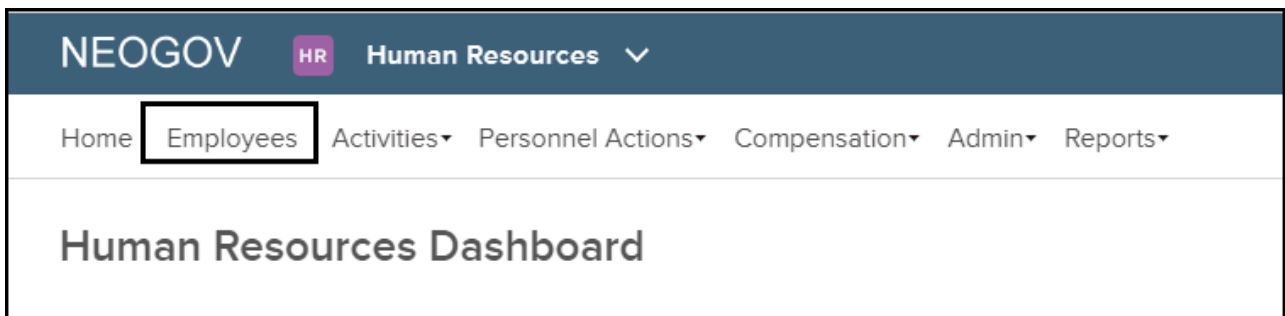
NEOGOV may automatically populate some fields when you enter something in a preceding field. For example, NEOGOV will populate **Tax Jurisdiction** after you enter the full address.

For more information, click [here](#) for a video tutorial.

Rehire

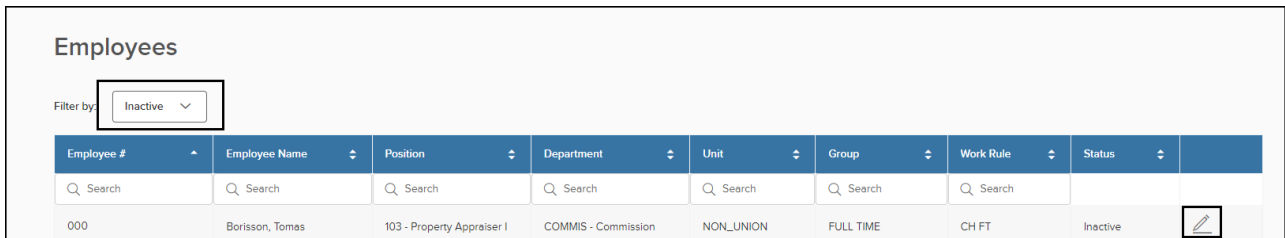
Use the **Employment** tab of the employee record to rehire an employee.

1. Click **Employees** from the **Human Resources Dashboard**.




The screenshot shows the 'Human Resources Dashboard' with a navigation bar. The 'Employees' link is highlighted with a red box. Other navigation items include Home, Activities, Personnel Actions, Compensation, Admin, and Reports.

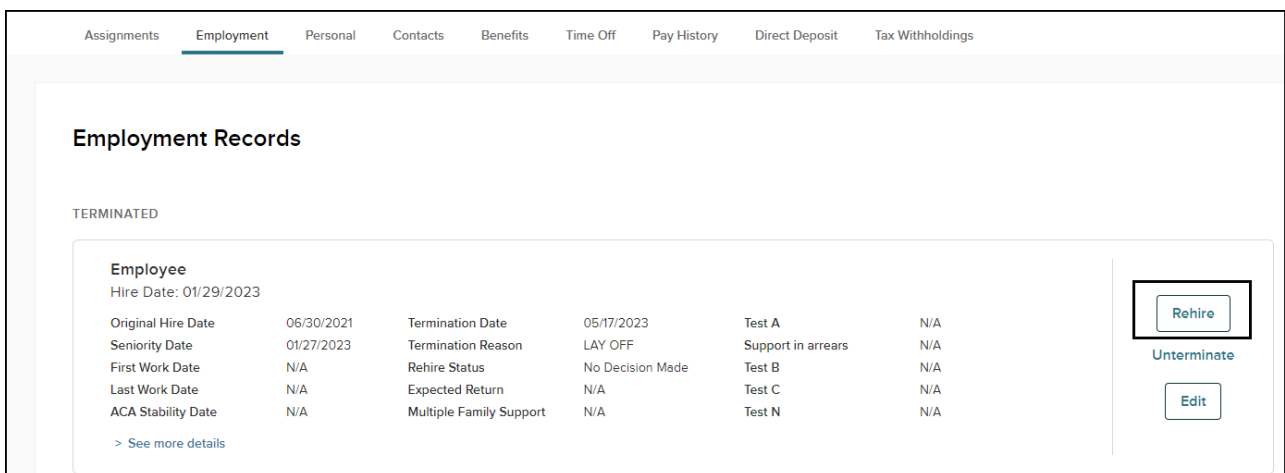
2. Locate the desired **Inactive** employee and click the pencil icon (**Edit record**).



The screenshot shows the 'Employees' list with a 'Filter by' dropdown set to 'Inactive'. A table lists employee details. The pencil icon in the last column of the first row is highlighted with a red box.

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status	
000	Borisson, Tomas	103 - Property Appraiser I	COMMIS - Commission	NON_UNION	FULL TIME	CH FT	Inactive	

3. Under the **Employment** tab, click **Rehire**. The **Rehire** modal appears.



The screenshot shows the 'Employment Records' modal for a terminated employee. The 'Rehire' button is highlighted with a red box. The modal displays employee details and a list of actions.

Employee					
Hire Date: 01/29/2023					
Original Hire Date	06/30/2021	Termination Date	05/17/2023	Test A	N/A
Seniority Date	01/27/2023	Termination Reason	LAY OFF	Support in arrears	N/A
First Work Date	N/A	Rehire Status	No Decision Made	Test B	N/A
Last Work Date	N/A	Expected Return	N/A	Test C	N/A
ACA Stability Date	N/A	Multiple Family Support	N/A	Test N	N/A

Rehire
Underminate
Edit

4. Select the appropriate values for **Employment Type**, **Original Hire Date**, **Rehire Date**, and **Seniority Date**.
5. Click **Continue**. The **Rehire** modal displays the assignment details for the employee.

Rehire
Cancel Continue

5

Add New Employment Record

* Employment Type

* Original Hire Date

* Rehire Date

* Seniority Date

6. Complete the required assignment details and click **Submit**.

Rehire
Go Back Submit

* Assignment Name

Prime Assignment

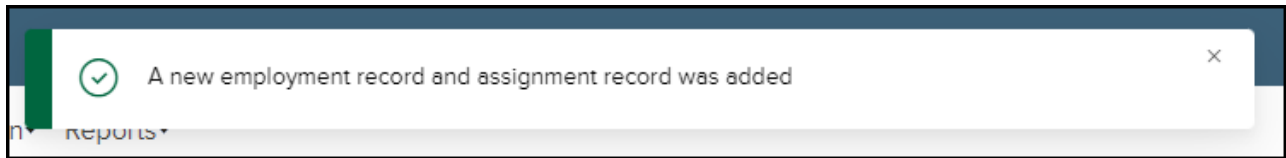
One assignment must be marked as primary at all times. Since this is currently the only active assignment associated with this employee, this value cannot be modified.

* Start Date

End Date

Wage Progress Date

NEOGOV displays a confirmation and creates a new employment record.



Employment Records

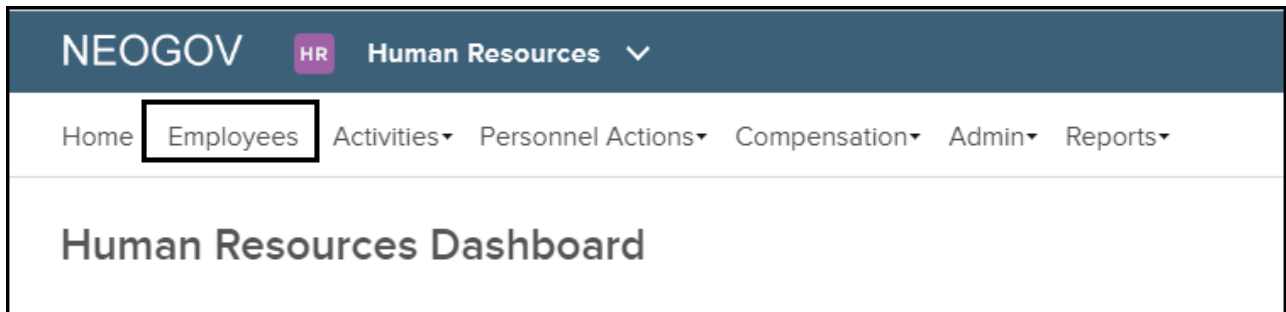
ACTIVE

Employee						Terminate
Hire Date: 06/24/2023						
Original Hire Date	06/30/2021	Multiple Family Support	N/A	Test N	N/A	Edit
Seniority Date	06/24/2023	Test A	N/A	Test O	N/A	
First Work Date	N/A	Support in arrears	N/A	PERA Exclusion Required	N/A	
Last Work Date	N/A	Test B	N/A			
ACA Stability Date	N/A	Test C	N/A			

Terminate

Use the **Employment** tab of the employee record to terminate the employee from the organization.

1. Click **Employees** from the **Human Resources Dashboard**.



2. Locate the desired employee and click the pencil icon (**Edit** record).

Employees

Filter by: Active

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status	
<input type="text" value="Q Search"/>	<input type="text" value="Q Search"/>	<input type="text" value="Q Search"/>	<input type="text" value="Q Search"/>	<input type="text" value="Q Search"/>	<input type="text" value="Q Search"/>	<input type="text" value="Q Search"/>		
11009		170 - Business Manager	PD - Police	NON_UNION	FULL TIME	SALARY	Active	

- Under the **Employment** tab, click **Terminate**. The **Terminate Employment** modal appears.

Assignments **Employment** Personal Contacts Benefits Time Off Pay History Direct Deposit

Employment Records

ACTIVE

Employee
Hire Date: 01/01/2018

Original Hire Date	01/01/2018	Multiple Family Support	N/A
Seniority Date	01/01/1992	Support in arrears	N/A
First Work Date	01/01/2018	PERA Exclusion Required	N/A
Last Work Date	10/14/2022		
ACA Stability Date	N/A		

Terminate

Edit

- Select the appropriate values for **Termination Date**, **Termination Reason**, and **Rehire Status**.

If you are a TMS customer with **Onboarding**, select **Start Offboarding**. Ask your implementation consultant for the **New Hires/ReHires Guide**.

- Click **Save**.

Terminate Employment x

*** Termination Date**

06/26/2023
📅

Note: The employee's Benefits will end on the Termination Date

*** Termination Reason**

🔍
LAY OFF

*** Rehire Status**

Would Rehire
▼

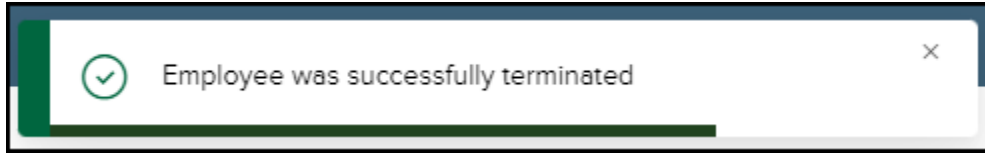
Start Offboarding

Cancel

Save

5

NEOGOV displays a confirmation message.



NEOGOV will change the employee's record and **Cancel Termination** is available.

Employment Records

ACTIVE

Employee
Hire Date: 01/01/2018

Original Hire Date	01/01/2018	Multiple Family Support	N/A
Seniority Date	01/01/1992	Support in arrears	N/A
First Work Date	01/01/2018	PERA Exclusion Required	N/A
Last Work Date	10/14/2022		
ACA Stability Date	N/A		

Cancel Termination
Edit

When you terminate an employee, NEOGOV moves them to the **Inactive Status** on the **Employees** screen.

Employees

Filter by: Inactive ▾

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status	
11009		170 - Business Manager	PD - Police	NON_UNION	FULL TIME	SALARY	Inactive	✎

After the termination date, the employee’s record will have the **Rehire** and **Underminate** options.

TERMINATED

Employee
Hire Date: 01/29/2023

Original Hire Date	06/30/2021	Termination Date	05/17/2023	Test A	N/A
Seniority Date	01/27/2023	Termination Reason	LAY OFF	Support in arrears	N/A
First Work Date	N/A	Rehire Status	No Decision Made	Test B	N/A
Last Work Date	N/A	Expected Return	N/A	Test C	N/A
ACA Stability Date	N/A	Multiple Family Support	N/A	Test N	N/A

> See more details

Rehire

Underminate

Edit



Warning: Do not use **Cancel Termination** or **Underminate** for rehiring. Only use these options if an employee was accidentally terminated.

If you terminate and rehire the same employee into a different assignment, NEOGOV keeps a history of the employee’s past records.

TERMINATED

Employee
Hire Date: 01/29/2023

Original Hire Date	06/30/2021	Termination Date	05/17/2023	Test A	N/A
Seniority Date	01/27/2023	Termination Reason	LAY OFF	Support in arrears	N/A
First Work Date	N/A	Rehire Status	No Decision Made	Test B	N/A
Last Work Date	N/A	Expected Return	N/A	Test C	N/A
ACA Stability Date	N/A	Multiple Family Support	N/A	Test N	N/A

> See more details

Edit

Employee
Hire Date: 07/04/2021

Original Hire Date	06/27/2021	Termination Date	01/25/2023	Test A	N/A
Seniority Date	07/05/2021	Termination Reason	ABSENCE	Support in arrears	N/A
First Work Date	07/04/2021	Rehire Status	No Decision Made	Test B	N/A
Last Work Date	N/A	Expected Return	N/A	Test C	N/A
ACA Stability Date	N/A	Multiple Family Support	N/A	Test N	N/A

> See more details

Edit

Bulk Manager Changes

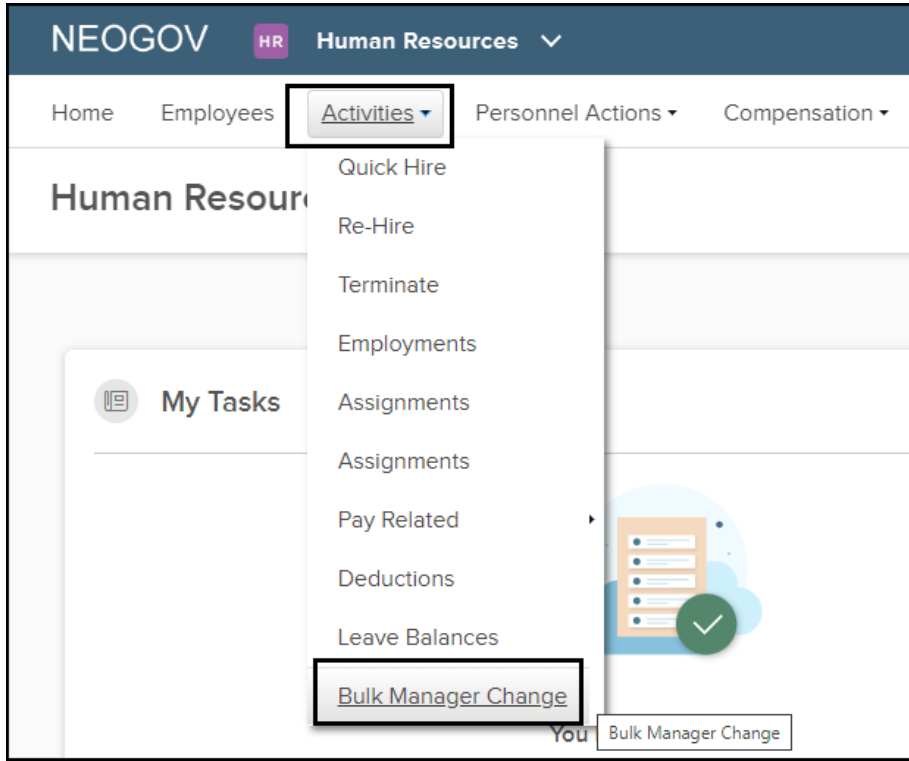
Use **Bulk Manager Change (UEBMC)** to update the manager for a group of employees.

The screenshot shows the 'Bulk Manager Change (UEBMC)' interface within the NEOGOV system. The top navigation bar includes 'NEOGOV', 'HR', and 'Human Resources'. Below this is a menu with 'Home', 'Employees', 'Activities', 'Personnel Actions', 'Compensation', 'Admin', and 'Reports'. The main title is 'Bulk Manager Change (UEBMC)'. Underneath, there are two tabs: 'Criteria' (selected) and 'Run/Scheduling Options'. The 'Criteria' tab contains a section titled 'REPORT PARAMETERS' with the following fields:

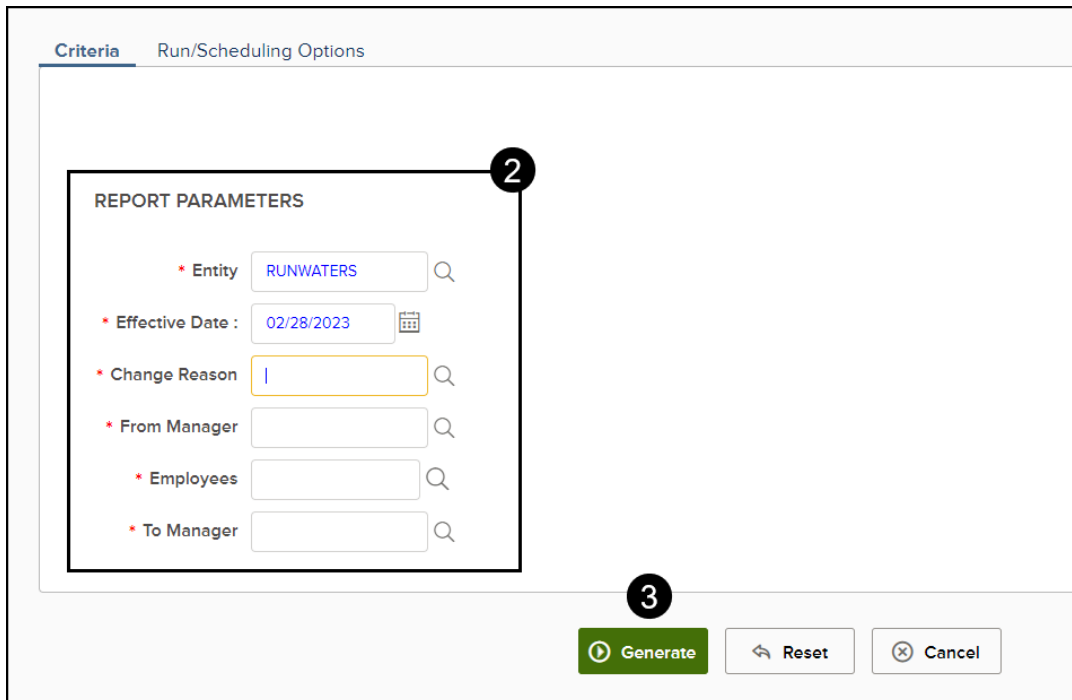
- * Entity: (with a search icon)
- * Effective Date: (with a calendar icon)
- * Change Reason: (with a search icon)
- * From Manager: (with a search icon)
- * Employees: (with a search icon)
- * To Manager: (with a search icon)

At the bottom right of the form, there are three buttons: a green 'Generate' button with a play icon, a 'Reset' button with a refresh icon, and a 'Cancel' button with a close icon.

1. From the **Human Resources Dashboard**, click **Activities** > **Bulk Manager Change**, or search for **UEBMC** in the **Page Code** field.



2. Under the **Criteria** tab, complete the required fields (red asterisk).
3. Click **Generate**.

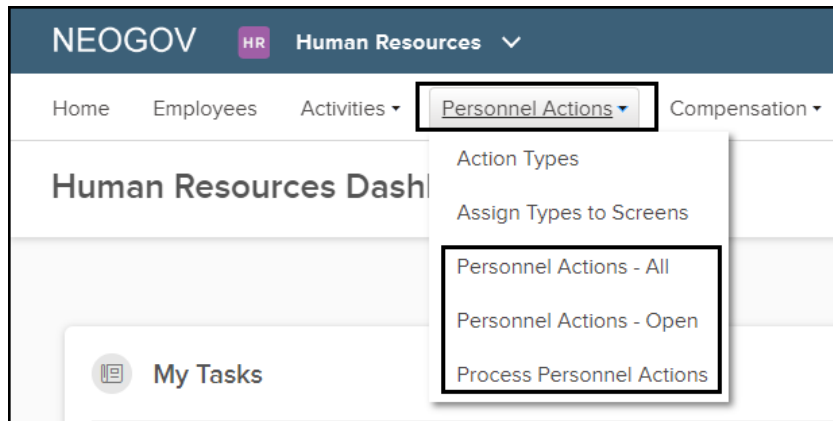


HR Functions

The **Human Resources** product has features for HR Admins including personnel actions, security for screens, and email workflows.

Personnel Actions

Use the following **Personnel Actions** (PAs) to process and maintain these items for your organization.



Menu Item	Description	Screen Name
Personnel Actions – All	Contains the list of all active and terminated employees. You can search for these employees and view all associated historical PAs.	Personnel Actions (ISPA)
Personnel Actions – Open	Contains the list of all open/active PAs for you to maintain. On this screen, you can view, cancel, and process the PAs. See note below.	Open Personnel Actions (ISPA_NGV)
Process Personnel Actions	This screen runs a report that will mass process PAs. You can schedule this report to automatically run hourly, daily, weekly, or monthly.	Update Personnel Actions (USPPA)



Important: If needed, your implementation consultant can set up the PA processing to automatically occur every hour. You do not need to manually process each PA on this page. However, you can use the process option if you need to make an immediate change.

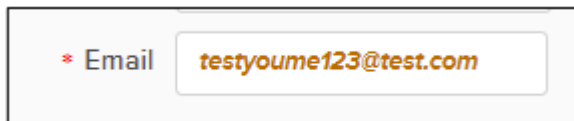
Personnel Action Process

The following example describes how NEOGOV handles PAs.

1. The HR Admin changes the personnel action item.
2. The HR Admin submits the change.
3. NEOGOV initiates the approval task.
4. The designated approvers approve the PA.
5. NEOGOV automatically processes PAs hourly and will make the change effective in the next hour.

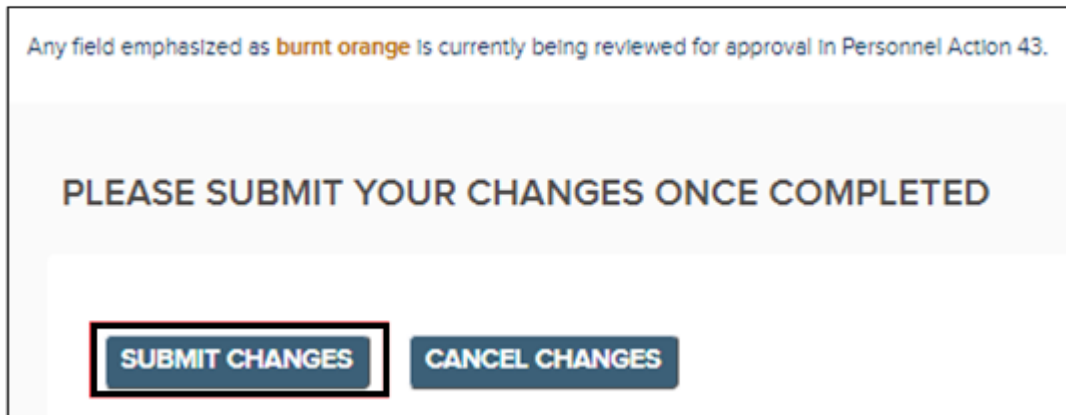
The following is an example of how to use the PA process.

1. When the Admin changes a personnel action item, NEOGOV will highlight the item in burnt orange to indicate that the item is pending approval.



* Email

2. NEOGOV displays a message at the top of the screen. Click **Submit Changes** to start the approval process.

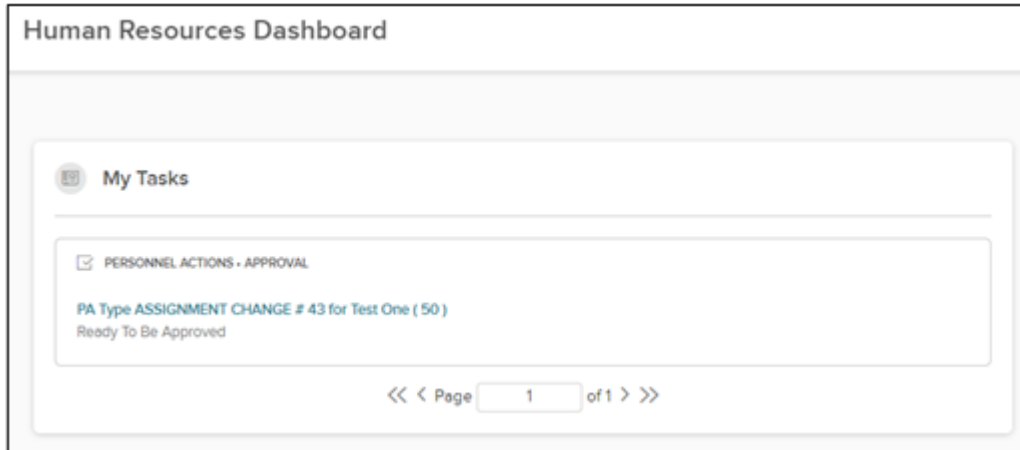


Any field emphasized as **burnt orange** is currently being reviewed for approval in Personnel Action 43.

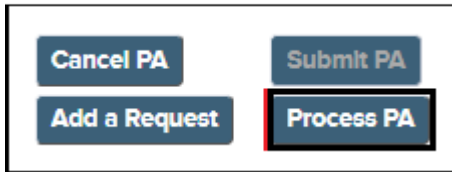
PLEASE SUBMIT YOUR CHANGES ONCE COMPLETED

SUBMIT CHANGES **CANCEL CHANGES**

3. After submitting, NEOGOV sends the approver a task on their **Dashboard**.



4. After approving, go to **Personnel Actions > Personnel Actions - Open** and click **Process PA**.

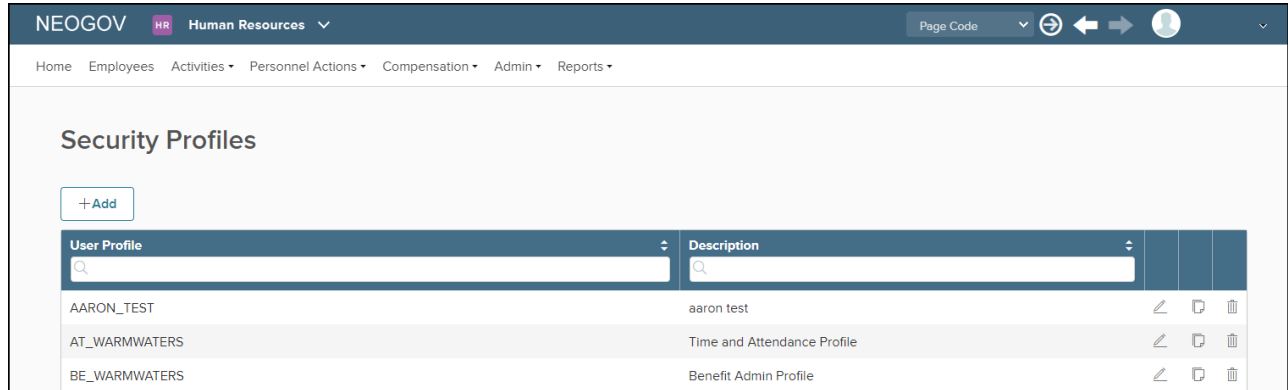


NEOGOV will process the PA based on the setup on the **Update Personnel Actions (USPPA)** screen.

	For more information, see the NEOGOV Personnel Actions document.
---	---

Security

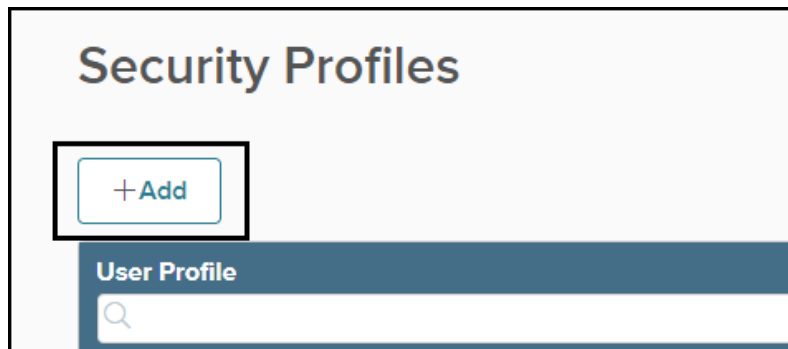
Use the **Security Profiles** page to create and maintain access to NEOGOV screens within your organization.



1. From the **Human Resources Dashboard**, click **Admin > Security > Security Profiles**.



2. Click **+Add**.



3. Enter the **User Security Profile Name** and **Description**.
4. Select the desired product the profile will have access to and click **Save**. NEOGOV will display a confirmation message.

Add User Security Profile

3

*User Security Profile Name
Doc Test

Description
Testing for Docs

4

What products does the user have access to?

- Human Resources (HR)
- Payroll (PR)
- Benefits (BE)
- Time & Attendance (TA)
- Analytics (AN)

Cancel Save

After saving, NEOGOV displays the product **Roles** for the profile.

Roles

Add

Role	Role Type	Description	
DOCTEST_ESS_EXE	Executions	Employee Self Service Executions	
DOCTEST_HR_EXE	Executions	Human Resources Executions	
DOCTEST_PR_EXE	Executions	Payroll Executions	
DOCTEST_BE_EXE	Executions	Benefits Executions	
DOCTEST_TA_EXE	Executions	Time and Attendance Executions	

<< < 1 > >>
10 items per page
Showing 1 - 5 of 5 items

By default, each role includes full access to the product. If the profile needs limited access to any role, do the following.

1. On the desired **Role**, click the pencil icon (**Edit user role**). The **Edit Role** modal appears.

Role	Role Type	Description	
DOCTEST_ESS_EXE	Executions	Employee Self Service Executions	

2. Locate the desired **Function** and toggle the **Create, Retrieve, Update, and Delete** (CRUD) options as needed. Selecting or clearing the toggle will allow or restrict the option.

Edit Role ×

Role: DOCTEST_ESS_EXE Role Type: Executions Description: Employee Self Service Executions

Execution Rights

Function	Description	Create Allowed	Retrieve Allow...	Update Allowed	Delete Allowed
MBEV_US	Create Life or Work Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WIECIO	Clock In/Out Widget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Option	Description
Create Allowed	Allows the profile to create items within that screen.
Retrieve Allowed	Allows the profile to retrieve items within that screen.
Update Allowed	Allows the profile to update items within that screen.
Delete Allowed	Allows the profile to delete items within that screen.

3. Click **Save** at the bottom of the modal to record your changes and close the modal.
4. Click **Save** at the top of the **User Security Profile** screen to commit your changes. NEOGOV displays a confirmation message.
5. Click **< User Security Profiles** to return to the **Security Profiles** screen.

The new profile appears in the **User Profile** list.

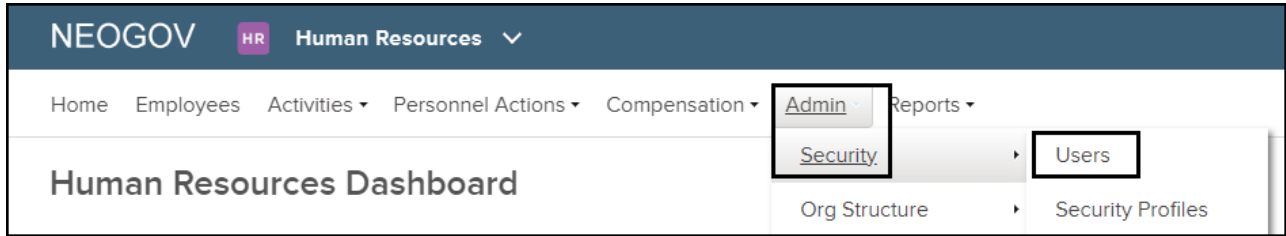
Accessor Keys and User Security Profiles

Use the **Assign Users to Security Profiles (USERS)** screen to maintain your employees' accessor keys (user names) and security access.

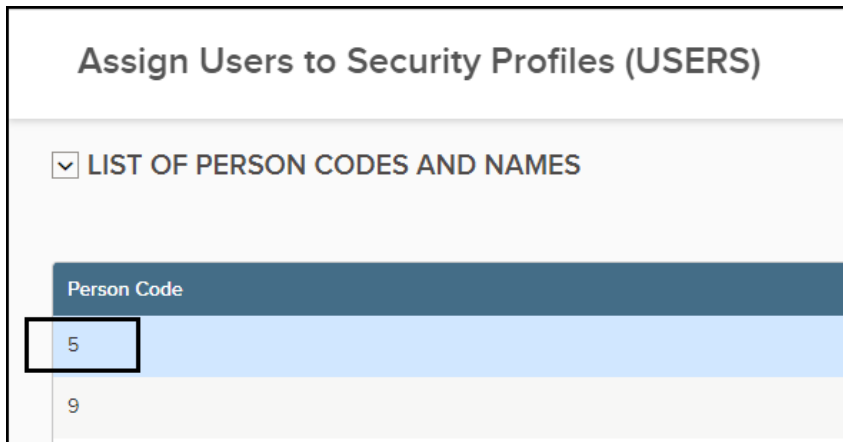
Person Code	First Name	Last Name
4	Earl	Campbell
5	Rauld	Devonshire
6	Marija	Viskovic

For more information click [here](#) to see a video.

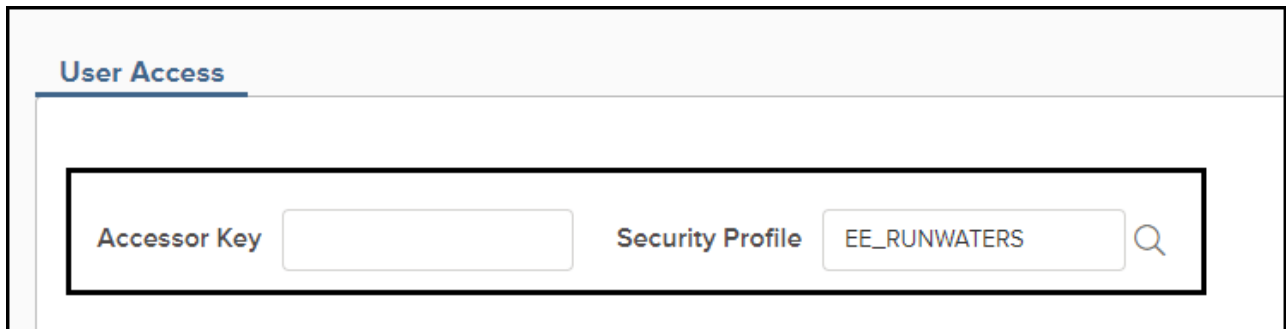
1. From the **Human Resources Dashboard**, click **Admin > Security > Users**, or search for **USERS** in the **Page Code** field.




2. Locate the desired **Person Code**.



3. Under the **User Access** tab, edit the **Accessor Key** and **Security Profile** (role) as needed then click **Save**.






All employees will have the default employee role.

If there is an Admin who needs different access, do the following.

1. Click the magnifying glass icon (**Search Security Profile**). The **SEARCH FOR: Security Profile** dialog appears.

User Access

Accessor Key Security Profile 

2. Click **Reset**.

SEARCH FOR: Security Profile

▼ **Search**

Security Profile :

3. Search for the desired **Role**, then click **OK**. NEOGOV closes the dialog and adds the **Role** to the **Security Profile** field.

SEARCH FOR: Security Profile

▼ **Search**

Security Profile :

Role	Description
AT_RUNWATERS	Time and Attendance Profile
BE_RUNWATERS	Benefit Admin Profile
DEPTHEAD_POLICE_JAIL	Police Union Jail Admin
EE_RUNWATERS	Employee Profile

4. Click **Save** to commit the change.

Workflow Emails

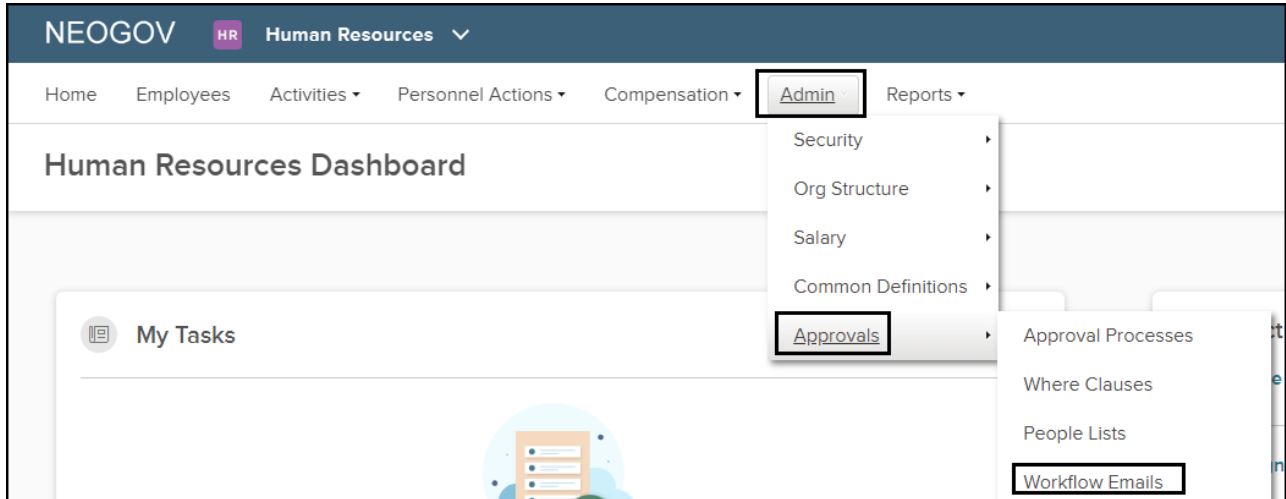
Use the **Email Notifications (IAWF)** screen to maintain your **Workflow Emails**.

Workflow	Description	Status	Visibility	Toggle
WF_EE_LVE_RO	Employee requested Leave	Under Construction		OFF <input checked="" type="checkbox"/> ON
WF_LEAVE_SUBMIT	Leave Request Submitted - Notify Employee	Under Construction		OFF <input checked="" type="checkbox"/> ON



NEOGOV has already collected this information from your organization and enabled your requested emails. Use this page to manage these emails.

1. From the **Human Resources Dashboard**, click **Admin > Approvals > Workflow Emails**, or search for **IAWF** in the **Page Code** field.



2. Locate the desired workflow and click the eyeball icon (**View email details**) to see the details or toggle the email to **OFF** or **ON**.




Org Structure

Use the **Admin > Org Structure** options from the **Human Resources Dashboard** to maintain your organization.

The screenshot shows the NEOGOV Human Resources Dashboard. The top navigation bar includes 'Home', 'Employees', 'Activities', 'Personnel Actions', 'Compensation', 'Admin', and 'Reports'. The 'Admin' menu is open, showing options: 'Security', 'Org Structure', 'Salary', 'Common Definitions', and 'Approvals'. The 'Org Structure' option is highlighted. A secondary menu is visible on the right, listing: 'Entities', 'Locations', 'Government Registrations', 'Business Calendars', 'General Contacts', 'Departments', 'Divisions', 'Units', 'Groups', 'Work Rules', 'Class Specs', 'Occupational Groups', 'Job Benefits', and 'Positions'. The main content area shows a 'My Tasks' section with a message: 'You have 0 tasks to do! Check back later for any new tasks.'

NEOGOV has already collected this information from your organization. Use the options in the above menu to manage the structure of your organization.



If you are a TMS customer, you will manage this data in HRIS. Click [here](#) to see a video with more information.

Occupational groups and job benefits are managed in HRIS and will transfer to TMS.

Each year you will need to extend your business calendars using the **Extend Calendar** button. NEOGOV will then create another 12-month calendar. If you have payroll services, they will handle this process.

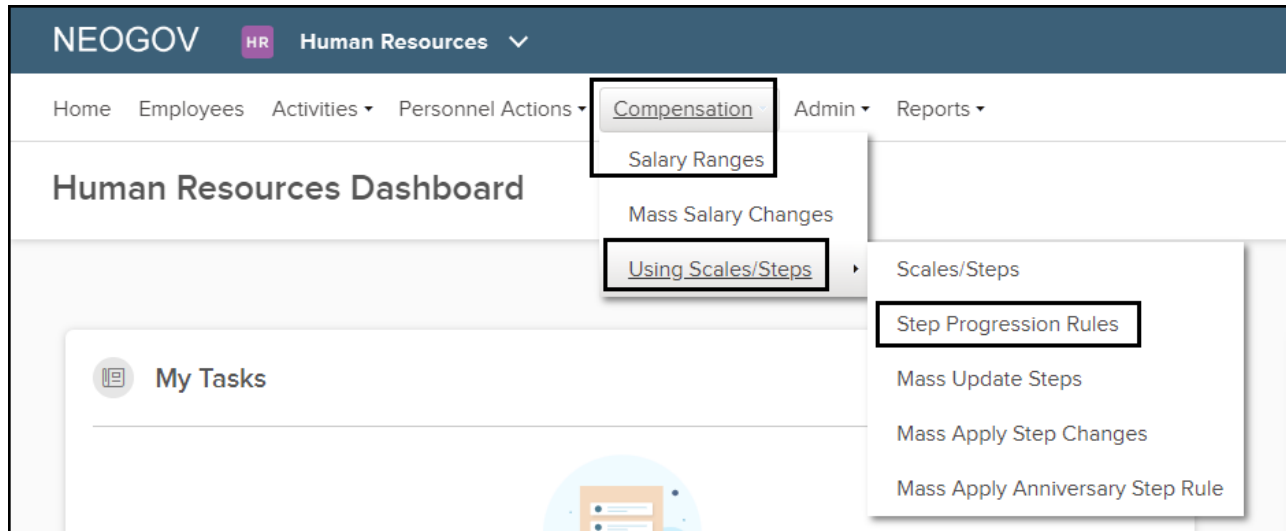
The **Define General Contacts (IECI)** screen is an optional section where you can list contacts tied to your organization for all HR Admins to view.

The table below lists the screens to maintain your organization structure.

Screen Name	Menu Path	Further Information
Entities (IDEN)	Admin > Org Structure > Entities	N/A
Locations (IDLN)	Admin > Org Structure > Locations	Video Tutorial
Departments (IDDPL)	Admin > Org Structure > Departments	Video Tutorial
Divisions (IDDVL)	Admin > Org Structure > Divisions	Video Tutorial
Units (IDUN)	Admin > Org Structure > Units	Video Tutorial
Groups (IDGR)	Admin > Org Structure > Groups	Video Tutorial
Work Rules (IDWR)	Admin > Org Structure > Work Rules	Video Tutorial
Class Specifications (IDCS)	Admin > Org Structure > Class Specs	Video Tutorial
Positions (IDPSL)	Admin > Org Structure > Positions	Video Tutorial
Occupational Groups (ICOG)	Admin > Org Structure > Occupational Groups	Video Tutorial
Maintain NGV Benefits (IRNB)	Admin > Org Structure > Job Benefits	Video Tutorial
Business Calendars (IDCL)	Admin > Org Structure > Business Calendars	N/A
Define General Contacts (IECI)	Admin > Org Structure > General Contacts	N/A

Salary Information

Use the **Salary Ranges**, **Scales/Steps**, and **Step Progression Rules** options from the **Compensation** menu to maintain your organization’s salary structure.



NEOGOV has already collected this information from your organization. Use the options from the menu when adding new information.

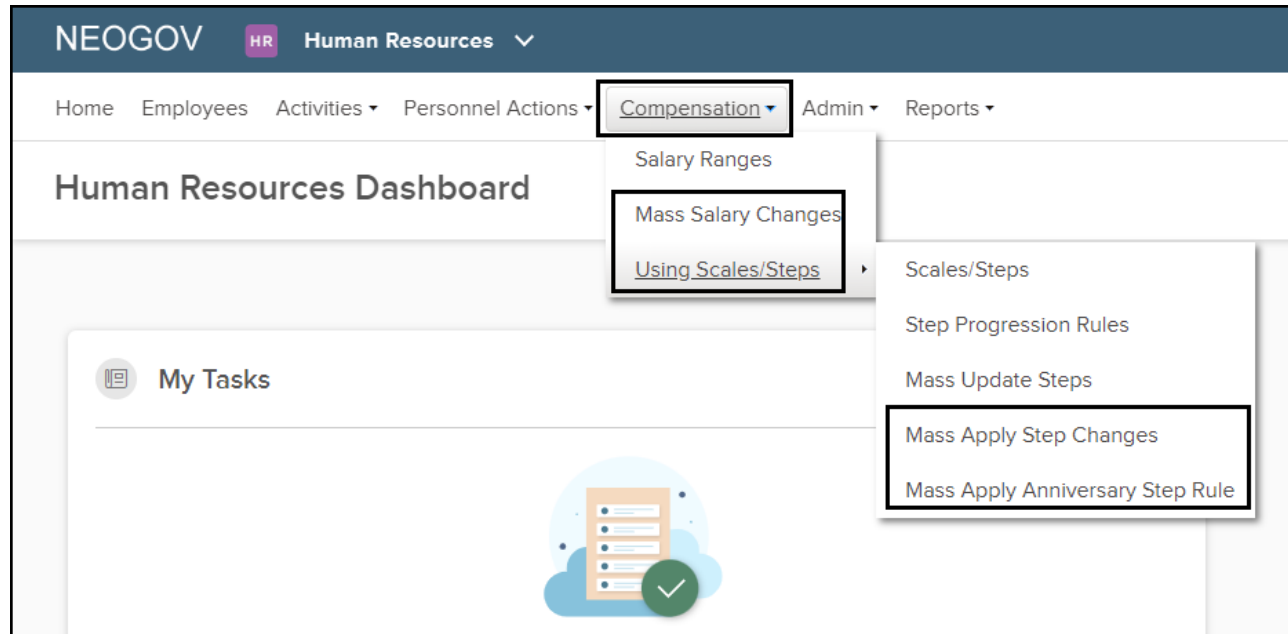
Additionally, you can apply multiple changes using bulk updates (see [Bulk Updates to Salary Information](#)).

The table below lists the screens to maintain your organization’s salary structure.

Screen Name	Menu Path	Description
Salary Ranges (ISSR)	Compensation > Salary Ranges	View and maintain salary ranges.
Wage Scales/Steps (ISWS)	Compensation > Using Scales/Steps > Scales/Steps	View and maintain wage scales.
Wage Step Rules (ISRS)	Compensation > Using Scales/Steps > Step Progression Rules	View and maintain wage step rules if you have automatic stepping.

Bulk Updates to Salary Information

Use the **Mass Salary Changes**, **Mass Apply Step Changes**, and **Mass Apply Anniversary Step Rule** options from the **Compensation** menu to bulk update salary information.



The table below lists the screens to apply bulk updates to your organization’s salary information.

Screen Name	Menu Path	Description
Apply General Wage Changes (USSC)	Compensation > Mass Salary Changes	Apply bulk changes to wages such as COLA.
Mass Salary Update Report (USMC)	Compensation > Using Scales/Steps > Mass Apply Step Changes	Apply bulk effective date changes to scales/steps/
Step Wages Based on Anniversary (USAS)	Compensation > Using Scales/Steps > Mass Apply Anniversary Step Rule	Apply bulk wage scale/step increases, based on anniversary date, if you have automatic stepping.

For more information, see the **Bulk Wage Change** document.

Apply Mass Wage Changes

This process will create personnel actions. If needed, your implementation consultant can configure NEOGOV to automatically include them in your hourly processing.

1. From the **Human Resources Dashboard**, click **Compensation > Mass Salary Changes**, or search for **USSC** in the **Page Code** field.
2. Under the **Criteria** tab, complete the required fields (red asterisk).

Apply General Wage Changes (USSC)

Criteria
Run/Scheduling Options

REPORT PARAMETERS (* NOT USED ON WINDWARD REPORTS)

* As Of Date

* Percentage Incr/Decr

* Flat \$ Amt Change

For **Percentage Incr/Decr** and **Flat \$ Amt Change**, you can enter a minus sign (-) before the value to indicate a decrease.

3. (Optional) Enter any desired **REPORT FILTERS** to narrow the criteria.
4. Click **Generate**.

REPORT FILTERS

People List

Unit

Person

Group

Entity

Payroll

Location

Job

Auth Area

Position

Department

Assignment Type

3


4

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Apply Mass Scale Step Changes

This process will create personnel actions. If needed, your implementation consultant can configure NEOGOV to automatically include them in your hourly processing.



Make changes to the scales/steps before you apply them in bulk.

1. From the **Human Resources Dashboard**, click **Compensation > Using Scales/Steps > Mass Update Steps**, or search for **USWS** in the **Page Code** field.
2. Under the **Criteria** tab, complete the required fields (red asterisk).
 - a. The **Change Date** will become the effective date of the new scales/steps.
 - b. Include a **Change Reason**.

Update Wage Scales/Steps (USWS)

Criteria
Run/Scheduling Options

REPORT PARAMETERS

* Entity

* Change Date

* Change Reason

* Flat \$ Amt Change

* Percent Incr/Decr

* Exception Level

* Print Run Logs

* Trial

User Comment



For **Percentage Incr/Decr** and **Flat \$ Amt Change**, you can enter a minus sign (-) before the value to indicate a decrease.

- (Optional) Enter any desired **REPORT FILTERS** to narrow the criteria.
- Click **Generate**.

REPORT FILTERS

Unit

Scale

Step

Rate Basis

4

- From the top menu, click **Compensation > Using Scales/Steps > Mass Apply Step Changes**.
- Under the **Criteria** tab, complete the fields described in the table below.

Mass Salary Update Report (USMC)

Criteria
Run/Scheduling Options

REPORT PARAMETERS

<p>* Entity <input type="text" value="RUNWATERS"/> <input type="button" value="Q"/></p> <p>* From Date <input type="text" value="02/20/2023"/> <input type="button" value="Calendar"/></p> <p>* Change Reason <input type="text"/></p> <p>* Create PA <input type="button" value="Yes"/> <input type="button" value="v"/></p> <p>* Ignore Rate Diff. <input type="button" value="No"/> <input type="button" value="v"/></p>	<p>* Include Future Hires <input type="button" value="No"/> <input type="button" value="v"/></p> <p>* Include Future Terms. <input type="button" value="No"/> <input type="button" value="v"/></p> <p>* Include Leaves <input type="button" value="No"/> <input type="button" value="v"/></p> <p>* Include Inactives <input type="button" value="No"/> <input type="button" value="v"/></p> <p>* Trial <input type="button" value="Yes"/> <input type="button" value="v"/></p> <p>* Exception Level <input type="button" value="0-Exceptions"/> <input type="button" value="v"/></p> <p>User Comment <input type="text"/></p>
---	---

Field	Description
Change Reason	Select the reason for the change.
Create PA	Yes: NEOGOV will create a personnel Action.
Ignore Rate Diff.	<ul style="list-style-type: none"> • Yes: NEOGOV will exclude employees whose scales/steps were manually changed. • No: NEOGOV will update all scales/steps associated with this process.
Include Future Hires	Yes: NEOGOV will update the scales/steps for this category.
Include Future Terms.	Yes: NEOGOV will update the scales/steps for this category.
Include Future Leaves	Yes: NEOGOV will update the scales/steps for this category.
Include Inactives	Yes: NEOGOV will update the scales/steps for this category.
Trial	<ul style="list-style-type: none"> • Yes: Use this option for testing without committing the data. • No: NEOGOV will run the report and the changes will be effective.
Exception Level	Select 0-Exceptions only .

- (Optional) Enter any desired **REPORT FILTERS** to narrow the criteria.
- Click **Generate**.

REPORT FILTERS

Unit 7

Wage Scale

8


▶ Generate

↶ Reset

✕ Cancel

Apply Anniversary Sale/Step Changes

This process uses the **Wage Step Rule** field from the **Groups (IDGR)** or **Wage Scales/Steps (ISWS)** screens to determine if the employee should receive an anniversary increase. This process also creates personnel actions. If needed, your implementation consultant can configure NEOGOV to automatically include them in your hourly processing.

	<p>This process only applies if you use automatic stepping.</p>
---	---

1. From the **Human Resources Dashboard**, click **Compensation > Using Scales/Steps > Mass Apply Anniversary Step Rule**, or search for **USAS** in the **Page Code** field.
2. Under the **Criteria** tab, complete the required fields (red asterisk).

Step Wages Based on Anniversary (USAS)

Criteria
Run/Scheduling Options

REPORT PARAMETERS (* NOT USED ON WINDWARD REPORTS)

* Up To Date

Print EEs w/o PA (*) v

* Sort People By v

* Trial v

* Exception Level v

* Print Run Logs v

User Comment

3. (Optional) Complete any desired **REPORT FILTERS** to narrow the criteria.
4. Click **Generate**.

REPORT FILTERS

3

People List <input type="text"/> Q	Org Level Type <input type="text"/> Q
Person <input type="text"/> Q	Org Level <input type="text"/> Q
Entity <input type="text"/> Q	Unit <input type="text"/> Q
Location <input type="text"/> Q	Group <input type="text"/> Q
Auth Area <input type="text"/> Q	Payroll <input type="text"/> Q
Department <input type="text"/> Q	

4

Analytics and Reporting

The following standard reports are available in the **Analytics & Reporting** module.

Report Category	Report Name or Description
Employee Reports	Employee Information
	Employee Names and Addresses
	Employee Change Report
	Transfers & Promotions
	Employees By Position
	Employees by WCB Class by Department
	New Hires and Terminations
	Employee Profiles
	Personnel Movement
	Personnel Actions
Wage Details	
Organizational Reports	Jobs
	Positions
	HR Departmental Report
	Employee Counts
Interface Reports	Employee Generic Interface
	New Hire Interface
Government Reporting	EEO-1 Employment Equity
	EEO-4 Employment Equity
	EEO-4A Hawaii Govt Report
	EEO-4 New Hire Report
	EEO-5 Elementary Secondary Staff

Report Category	Report Name or Description
	Quarterly EE Report
	US Veterans Employment
Report History	The location where NEOGOV stores previously run reports.

Report Builder

This section provides a brief overview of NEOGOV's **Report Builder** to create custom reports. See the **NEOGOV Report Builder Guide** for more detailed information.

After running custom reports, NEOGOV stores them under the **Custom Report** tab.

Report Builder

Custom Report Standard Report

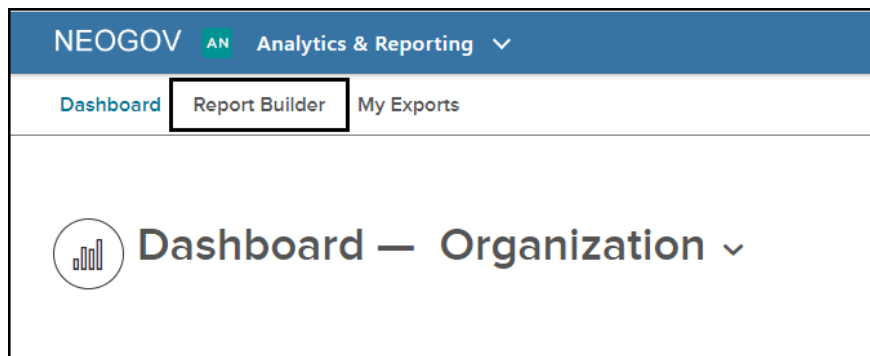
Product ▾

Report Name	Description	Report Type
🔍 Search	🔍 Search	🔍 Search
DocTest-2	This is a test.	Salary Ranges

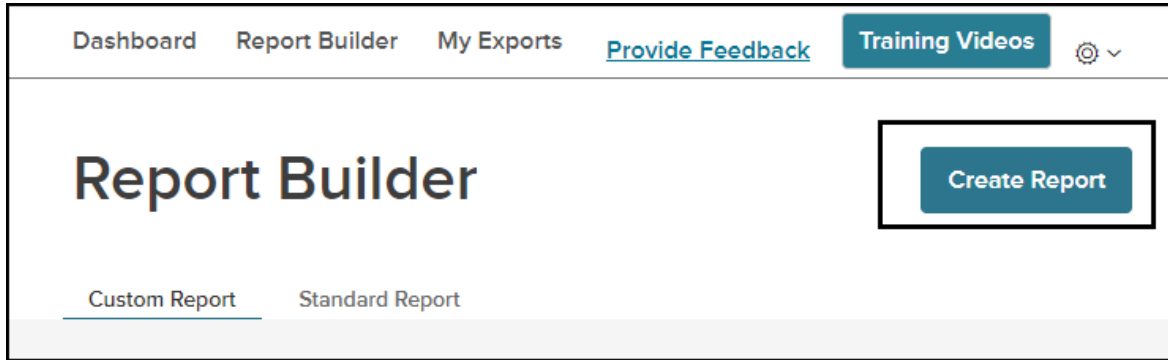
1. From the **Human Resources Dashboard**, select **Analytics & Reporting** from the product dropdown list.



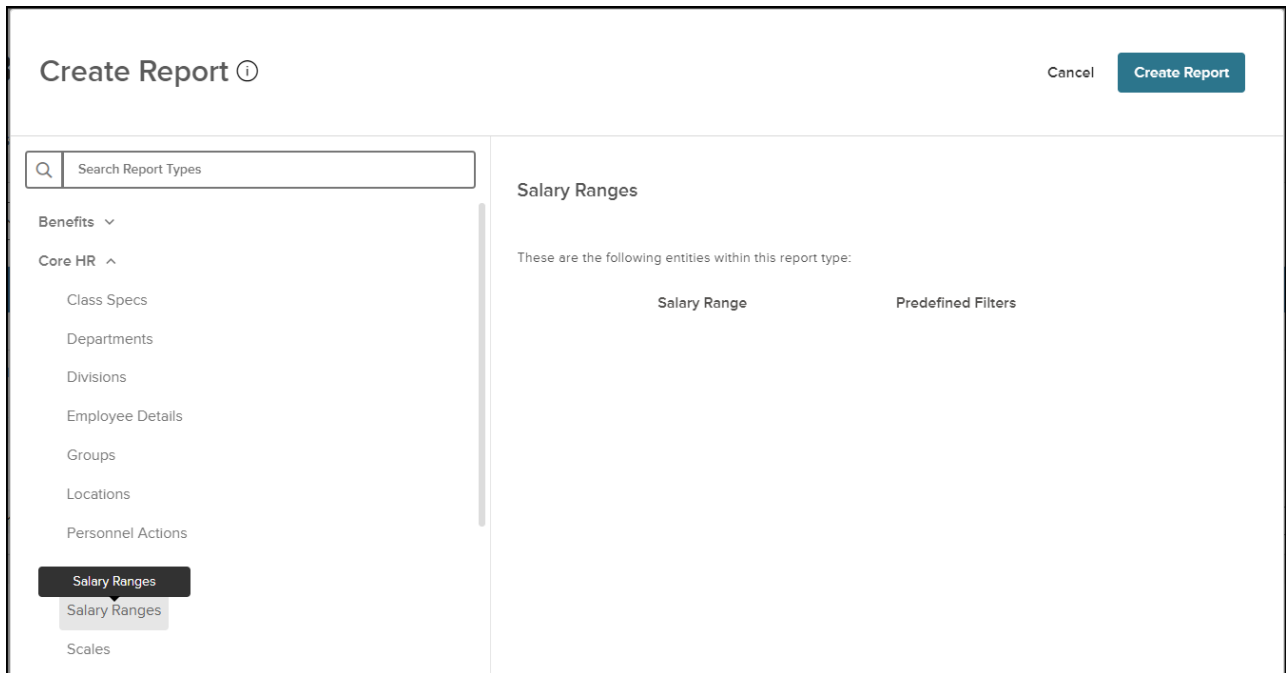
2. From the **Analytics & Reporting Dashboard**, click **Report Builder**. The **Report Builder** screen appears.



3. Click **Create Report**. The **Create Report** Dialog appears with a list of all your NEOGOV products.



4. Select the desired options from the product list, then click **Create Report**. The report configuration screen appears.



5. Select the desired fields to include in the report, then click **Add to Filters**. NEOGOV will add the filters to the **Preview** section.

SALARY RANGES
Untitled Report

Fields ⓘ

Search Fields...

Deselect All (6)

SALARY RANGE ^

- Achv Maximum Percent ▾
- Achv Target Percent ▾
- Achv Threshold Percent ▾
- Base Amount ▾
- Change Reason ▾
- Description ▾
- Dollar Per Point ▾
- Effective Date ▾
- Expiry Date ▾ Expiry Date
- Max Percent ▾
- Min Percent ▾
- Range ▾
- Range Max ▾
- Range Method ▾
- Range Mid ▾
- Range Min ▾

Filters & Logic ⓘ **Calculated Fields** ⓘ

Select records where all ▾ of the following apply

Predefined Filters -> As of Date ▾ within today ▾

Preview

It displays sample data only. To view full report, please save and run reports.

Table View Chart View

Range	Range Method	Description	Effective Date
50,000	By Fixed Value	Testing functionality	07/13/2021

6. (Optional) If needed, modify the values for any desired filter.

Filters & Logic ⓘ **Calculated Fields** ⓘ

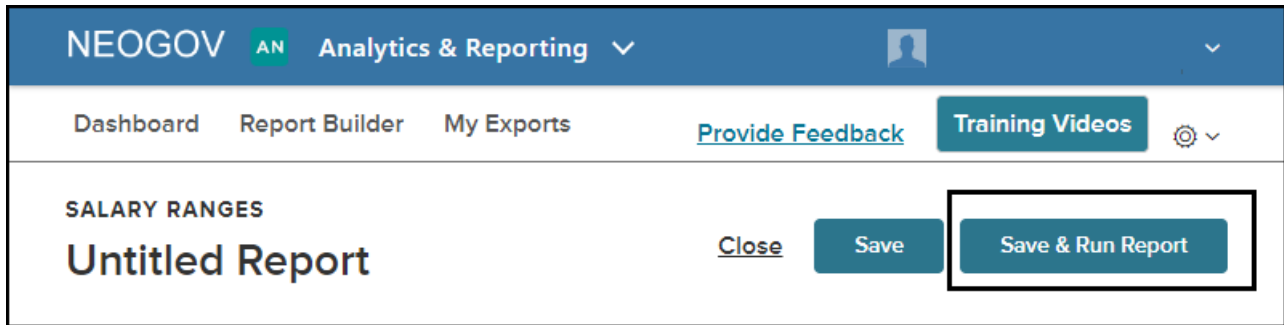
Select records where all ▾ of the following apply

Predefined Filters -> As of Date ▾ within today ▾

and Salary Range -> Base Amount ▾ is equal to ▾ [enter value]

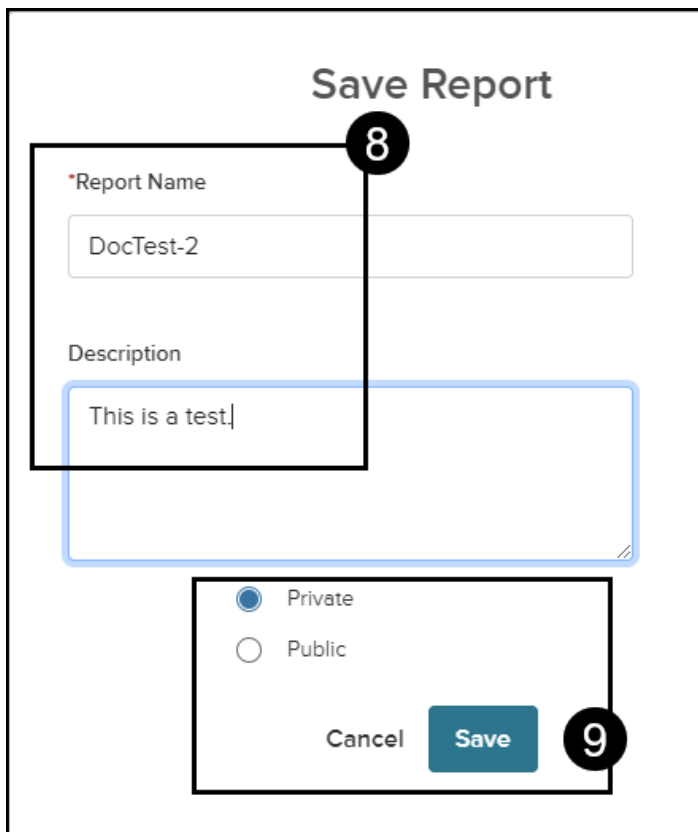
and Salary Range -> Change Reason ▾ is equal to ▾ [select value]

7. Click **Save & Run Report**. The **Save Report** dialog appears.

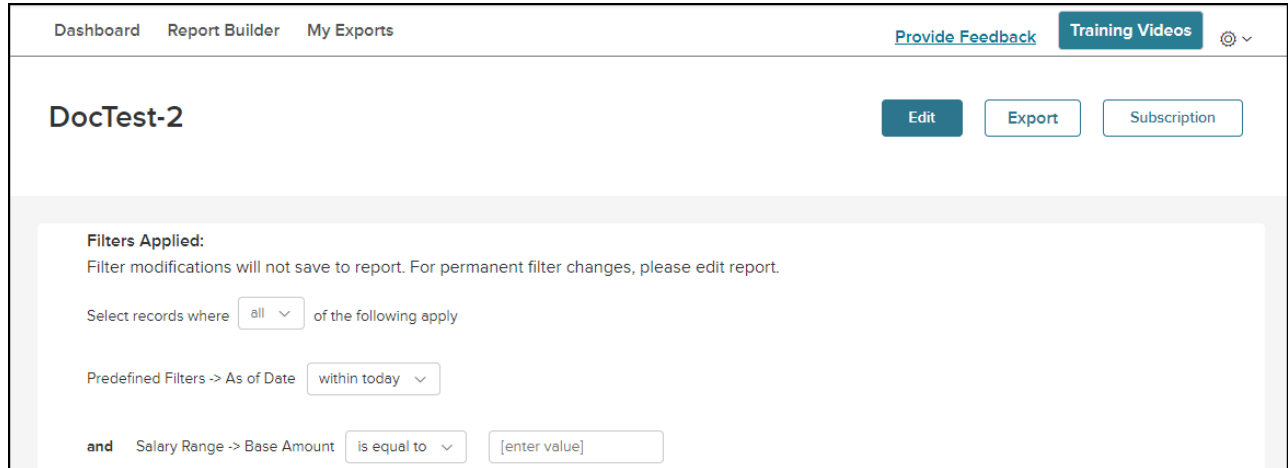


8. Enter a **Report Name** and **Description**.

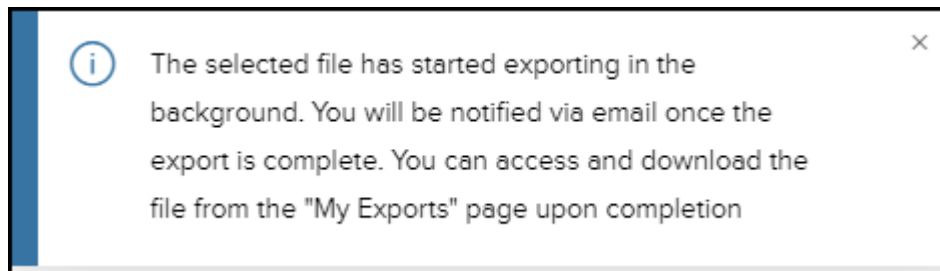
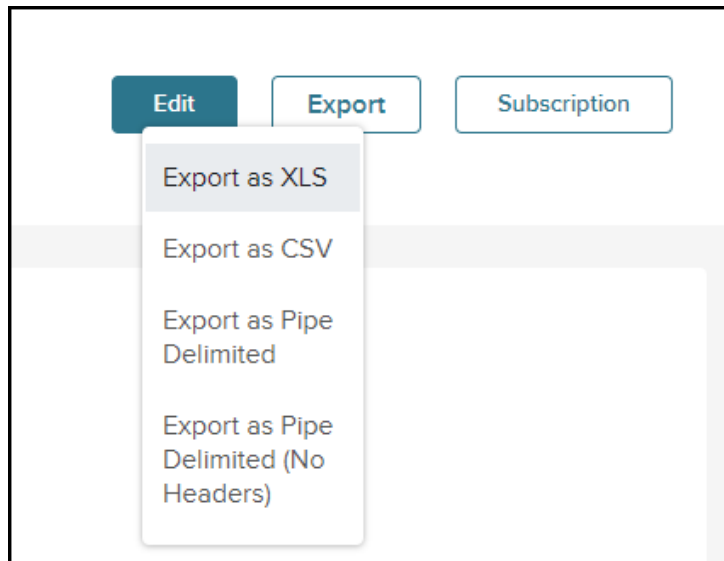
9. Select whether the report will be **Public** or **Private**, then click **Save**.



NEOGOV will compile the report then display an export screen where you can update filter values or export the report to multiple formats.



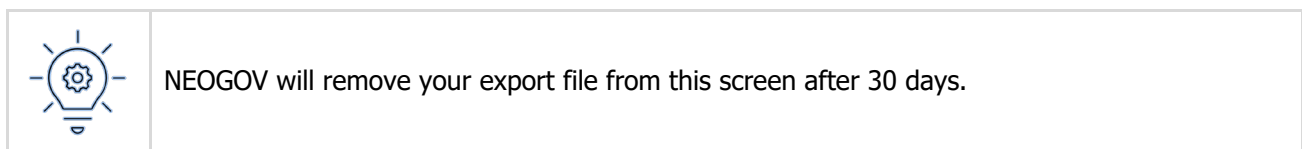
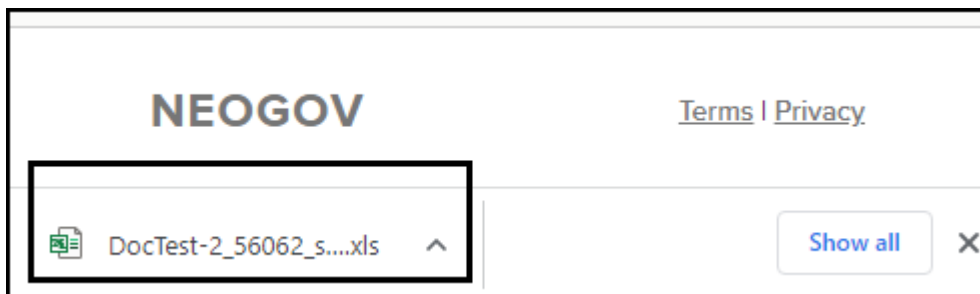
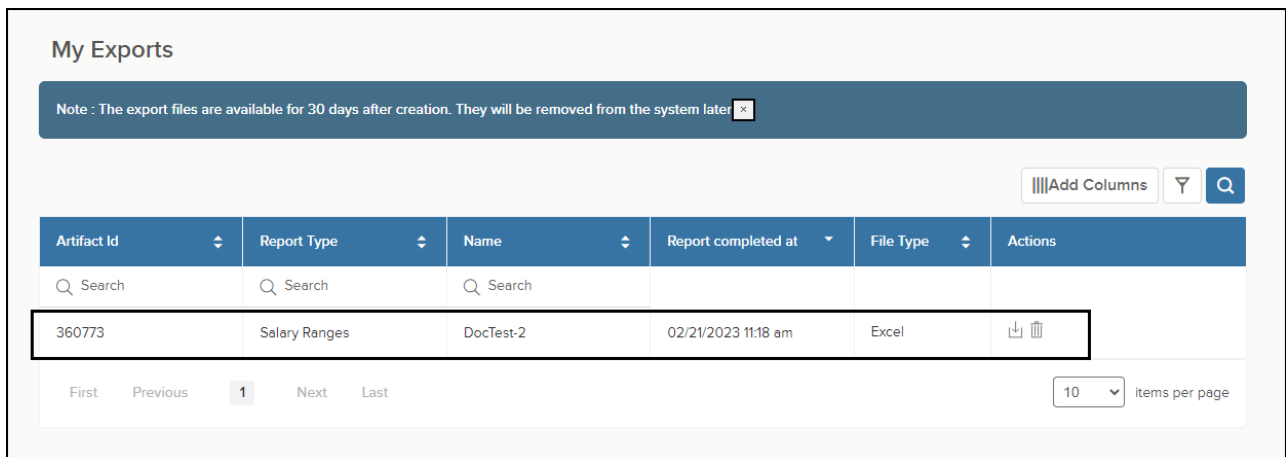
10. Click **Export** and select an option. NEOGOV displays a confirmation.



11. Click **My Exports** from the top menu. The **My Exports** screen appears.



12. Locate your report and click the download icon (**download file**). NEOGOV downloads the file to your computer.



Appendix

Revision History

Version	Description	Date
4	Removed deprecated content. Screenshot updates.	6/29/23
3	Updated Rehire and Terminate sections.	6/24/23
2	Updated Employee Profile section.	3/31/23
1	Initial release.	2/27/23