Complete Guide to Adding a New Employee

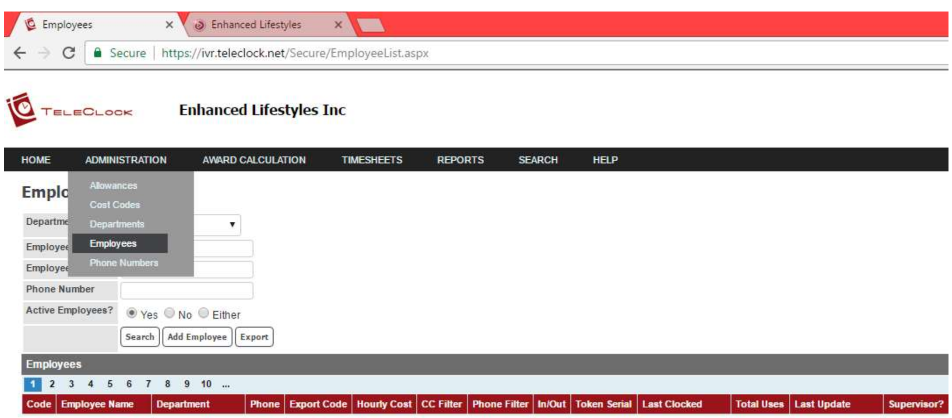
Once a new employee has commenced with Enhanced Lifestyles they need to be added into software such as TeleClock, CIMS, NAV & also a profile created with folders to where their personal information is stored.

Information must be added in:

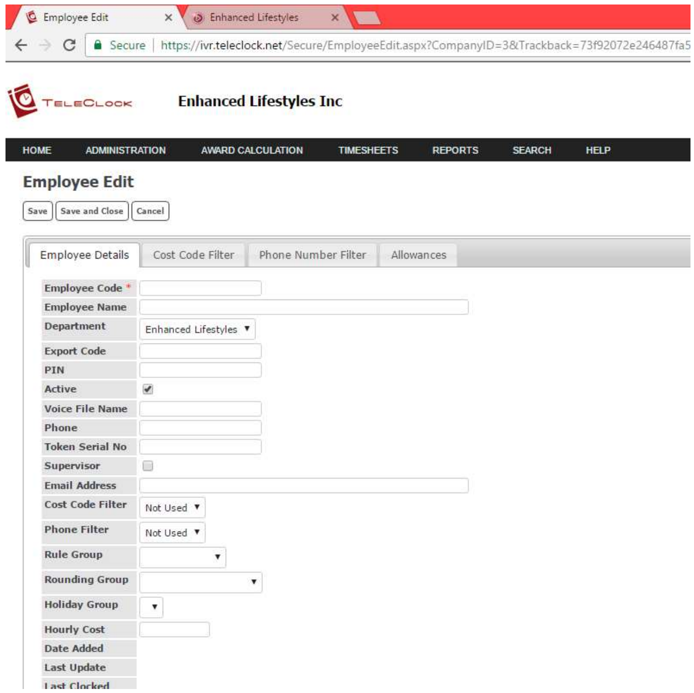
- **Teleclock:** Setting up a New Employee
- **CIMS:** To set up their CIMS ID, CIMSABILITY Login Details for Accept-Decline, allocate regions of availability, and to link CIMs and NAV.
- **NAV:** Including General info, Payroll Card, Resource Card, Cost Codes, Membership Details, Bank Account Details, Emergency Contact & Qualifications
- **File Explorer**: Under G Drive/People & Culture/Employees/Lifestyle Attendants
- **Sending a Profile to Coordination** – Including a Photo.

Adding the New employee into TeleClock

1. Go to the TeleClock Website (this instruction is also in the TeleClock Manual). To add a new employee, go to the top panel hover over Administration button and click on Employees (see images below).



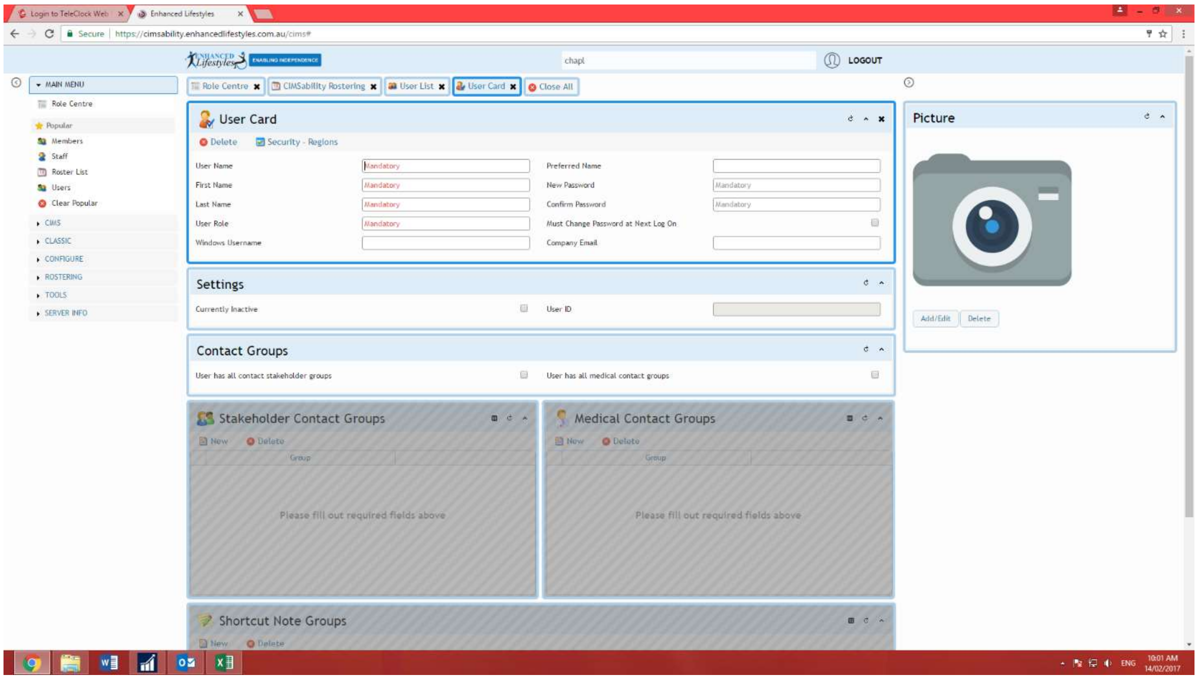
2. Click the code button and go to the very last page to see what the last teleclock number had been created, you then need to create the next number in the sequence for the employee e.g. 01020



3. Once you have the next number in the sequence you can add them into the screen to make it active on TeleClock. Boxes to fill out:
   - Employee Code: The next number in the sequence (this then becomes the code on NAV as well to identify the employee)
   - Employee name: e.g. Holmes, Leonie
   - Department: Enhanced Lifestyles (if office/admin employee, add their department as Office)
   - Export Code: Same as employee code
   - Save and Close at the top of the screen - this is now done.

<u>Adding the New employee into CIMS</u>

1. Go to CIMS Website→ Click onto Users (left hand side pane) → Click New. The screen below will show up.



Checklist of what Boxes to fill out

<u>USER CARD</u>

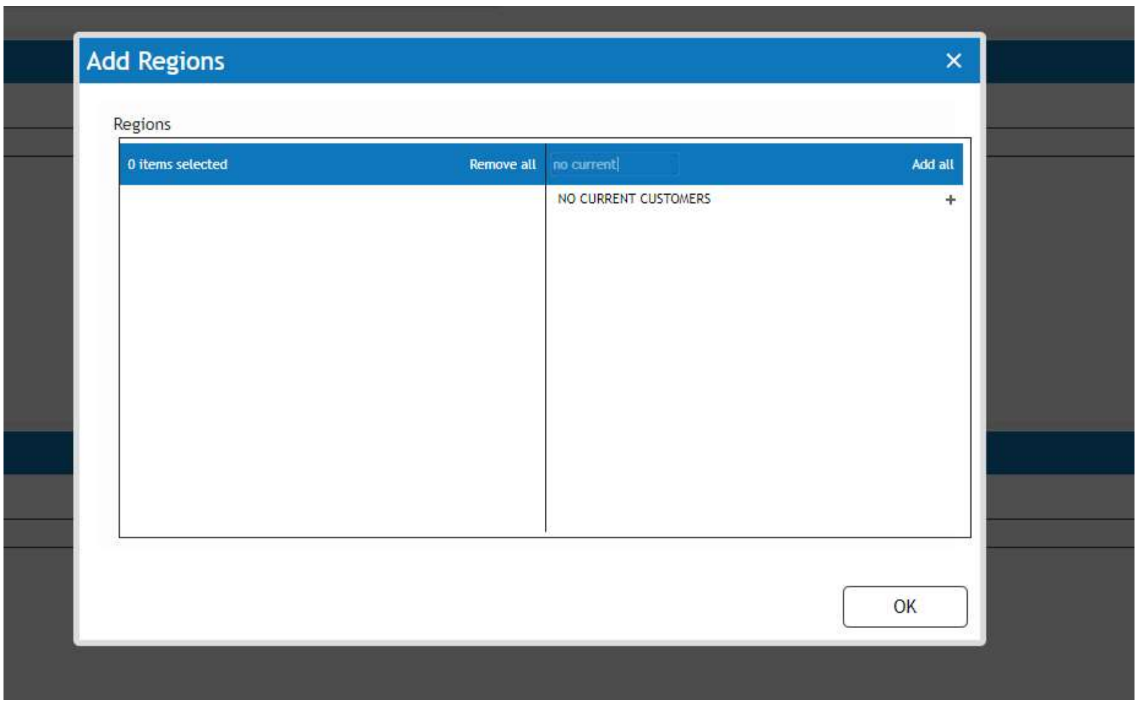
- Username: Their first initial of first name and then their full last name, plus their employee code e.g. John Smith, employee code 001 becomes ‘jsmith001’
- First Name
- Last Name
- User Role: Select applicable role from the drop-down list (e.g. Lifestyle Attendant, SDO, Customer Relations Officer)
- New Password: Enhanced12
- Confirm Password: Enhanced12
- Must Change Password at Next Log in: Click little box

<u>SETTINGS</u>

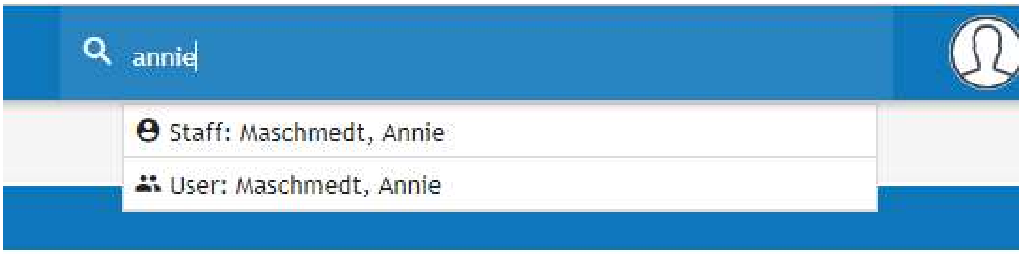
- User has all Contact Stakeholder Groups: Click little box
- User has all Medical Contact Groups: Click Little Box

Once this is done see the user ID and record: This is their CIMS number – This must be added in NAV – In their resource card (See resource Card Instruction)

- Click on Security – Regions (top left corner) and then tick the little box in the top right corner called "has all regions". This will open a new tab titled 'regions access'
- In the Regions Access tab, click 'edit regions' (located under the 'Regions' ribbon)
- In the right-hand column, search and add 'NO CURRENT CUSTOMERS'

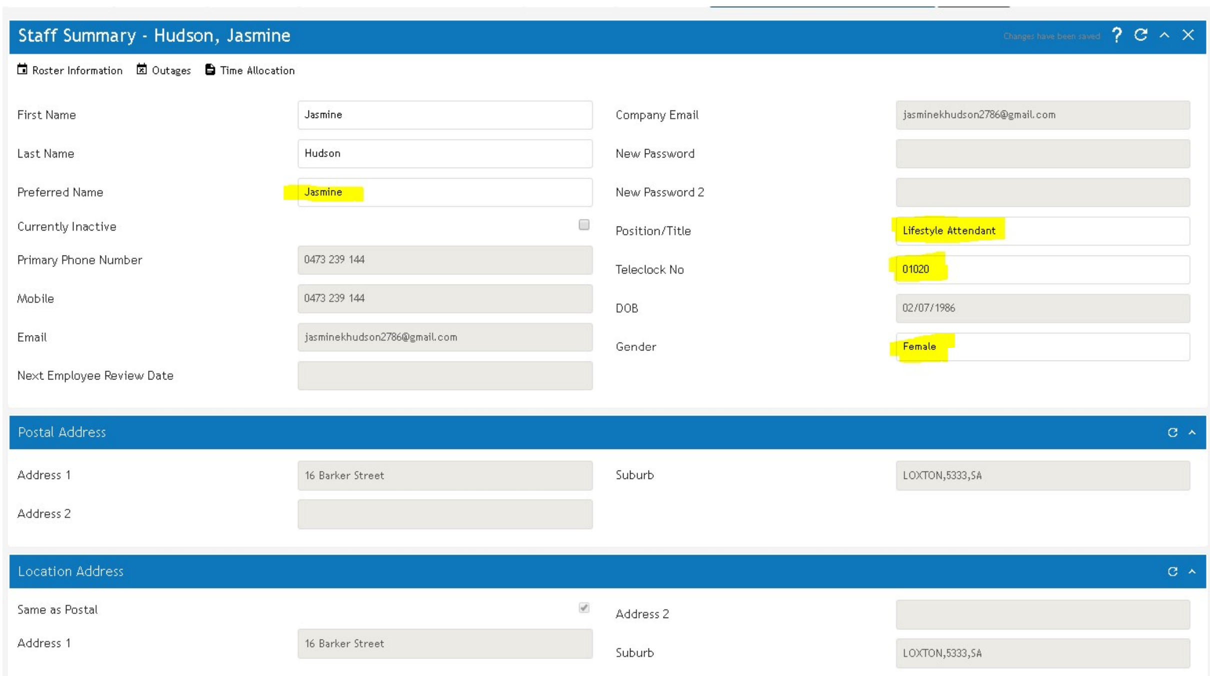


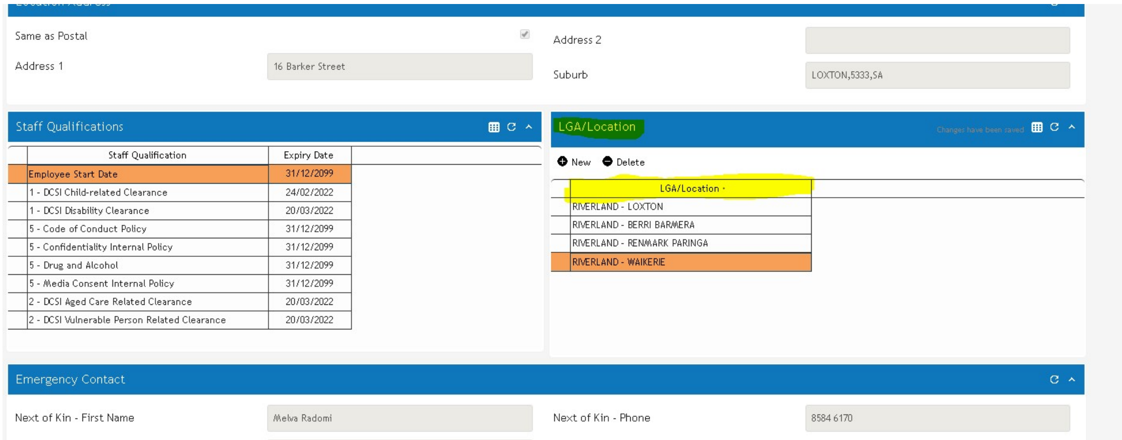
2. Once complete you need check that they are appearing as a staff member, and to populate their staff summary with information. Search for their name in the search bar (top right hand corner). Two results should show up – a user profile (this is what you have just created), and a staff profile, which you will need to manually populate with some information.



Most of the information in the Staff Summary will be pre-filled by the information you have entered NAV. With regards to employees, NAV is the source of information on CIMS, and once linked, information on NAV will overwrite information in CIMS.

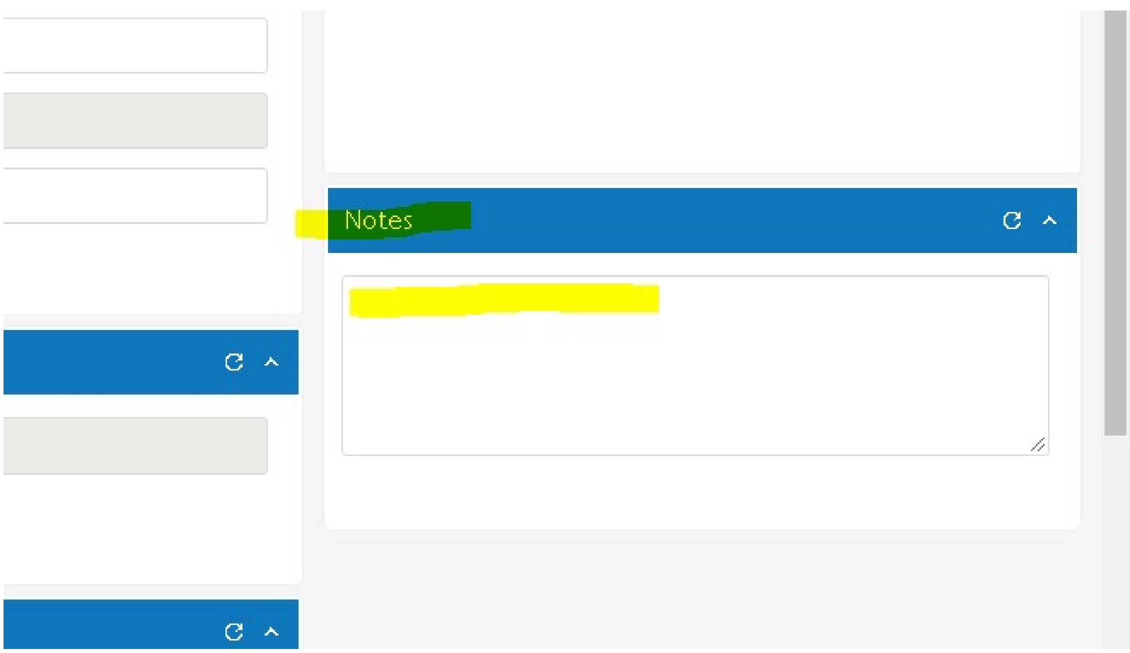
The below fields (highlighted in yellow) need to be filled with information manually:





LGA (Local Government Area)/Location refers to the locations and areas the employee is willing and able to work in. This is something they should include in their LA Profile – if they have not, you will need to ask them to complete it, or calculate what areas they are available in based on their address and the distance they are willing to travel.

To add a new location, click 'New' and begin typing the name of the Council/LGA area in which the employee is available to work. A list of applicable LGAs will appear based on what you type – select the applicable LGA, and it will be added as a new location.



The notes section of the Staff Summary, to the right-hand side of the page, should be filled with any other relevant information that there is not a specific field for, or information that is highly important. This may include information such as allergies, if they have been recruited to work with one specific customer, if there are any customer they cannot work with, and so on.

The other fields in the staff summary will be filled with information once it is added to NAV and CIMS and NAV are linked to one another. As you can see above, many fields are 'greyed out', meaning that they cannot be edited – this is because CIMS has been linked with NAV, and those fields can now only be populated with information via NAV.

3. Assigning Lifestyle Attendants to New LA Roster

When Lifestyle Attendants are entered into CIMS they should eb added to the New LA roster for their relevant region to increase their visibility for new shifts.

Open the relevant New LA roster in CIMS:

- 1001 – Riverland
- 1002 – Mt Gambier / South-East
- 1003 – Metro

Select the 'Roster' drop-down menu and select 'Staff'.

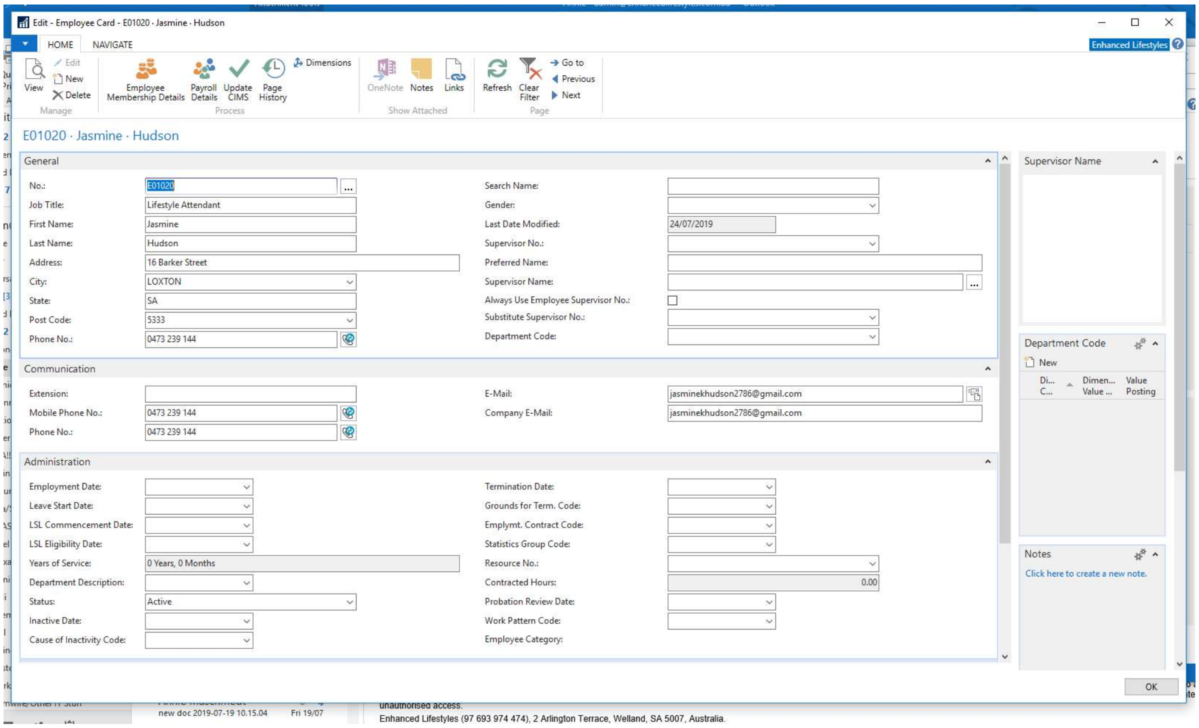
Select 'New' and:

- Enter the LA's name
- Set the Work Type to 'Shift Cover'
- Tick 'Show Total Hours'

Refresh the roster to check that details have been entered correctly.

Adding the Employee into NAV

1. Go to Home→ Click Active Employees → Click New (top right hand corner). The screen below will show up.



Checklist of what Boxes to fill out

GENERAL

- ☐ No: Always must start with E for Lifestyle Attendants with 5 digit codes (e.g. E01020, or E99987), and E0 for Office Staff with Teleclock codes under 100 e.g. E0026–Note:This is their TeleClock Number
- ☐ Job Title: Lifestyle Attendant
- ☐ First Name
- ☐ Last Name
- ☐ Address
- ☐ City
- ☐ State
- ☐ Postcode
- ☐ Phone No.
- ☐ Search Name – Note: More than one search name can be recorded if separated by a semicolon e.g. JOHN; SMITH
- ☐ Gender
- ☐ Preferred Name

COMMUNICATION

- ☐ Mobile Phone No.
- ☐ Phone No. – Note: This will be pre-filled by the phone number provided in general information and acts as the default phone number – it is generally wiser to input the employee's mobile number as the default number.
- ☐ Email:
- ☐ Company email: If the employee is an office employee, input their Enhanced Lifestyles primary email address.

ADMINISTRATION

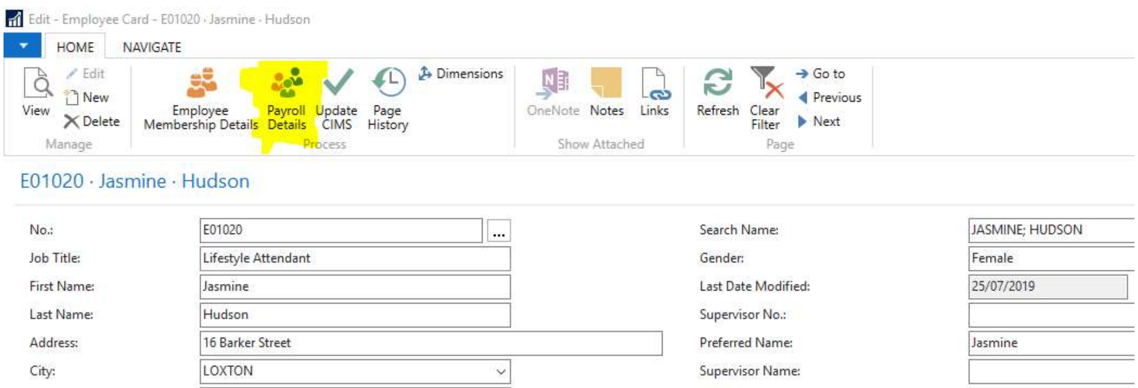
- ☐ Employment Date – Note: if you are unsure of when their shifts will commence, add their start date as their day of induction into the organisation.
- ☐ LSL Commencement Date: This will be auto filled and is the same as the Employment Date – Note: if the employment date changes, this will need to be changed to reflect it
- ☐ LSL Eligibility Date: This will be auto filled as being 10 years later than the employment date. If the Employment Date changes, this will also need to be changed to reflect it.
- ☐ Resource Number (click on there and press new) Note: this is a unique number that must match their employee number e.g. if Employee number is E0026 it will be R0026. See Process on how to create a resource number – creating a resource number should be completed at this point in the process.
- ☐ Contracted Hours: This will be auto filled by completing the payroll card.

- Employee Category: This will be auto filled by completing the payroll card.

PERSONAL

- Birth date
- Tax File Number
- Where was the Employee Born?
- Country of Birth
- Is English their First Language
- First Language
- How Well does the Employee Speak English?
- Aboriginal or Torres Strait Islander.

2. Once completed you need to **complete their Payroll Card** which is in the 'HOME' menu at the top. Click on it (see below picture below).



Checklist of what boxes to fill out

GENERAL

- ☐ Employee Number (auto-filled)
- ☐ Employee Status: Casual for LA's when they start, and either Full Time, Part Time, or Casual for Admin/Office employees
- ☐ Entitlement Group: General Uncapped for Casual employees, and General for office/admin employees unless designated otherwise.
- ☐ Employee Category: Either Administration (all office employees) or Lifestyle Attendant
- ☐ Base Unit of Measure: Hour
- ☐ Pay Scale: For Lifestyle Attendants, select LA-PP2 C. For all other employees, leave this blank, as their pay scale needs to be inputted manually.
    - For Casual Service Delivery Officers, select SDO CAS.
- ☐ Contracted Hours: Input number of hours the employee works on a weekly basis – Note: this applies only to Full or Part Time employees with a standardised number of hours. It can be left blank for all casual employees and Permanent Part Time employees who do not work a standardised number of hours.
- ☐ Salary: Add the annual salary of the employee – note: this only applies to salaried full-time or part-time employees who work a standardised amount of hours. For employees on a salary, the hourly rate will be calculated by inputting the contracted hours and salary.
- ☐ Rate: For casual Lifestyle Attendants and SDOs, this will be auto filled by selecting the pay scale. For salaried employees, this will be calculated by inputting the contracted hours and salary, but if you have an hourly rate, contracted hours, but no salary, you can calculate the salary by inputting the hours and rate instead.
- ☐ For casual employees, add their hourly rate.

TAX

- ☐ Tax File Number (should automatically be there)
- ☐ Tax Scale (this is what they have ticked on their TFN paperwork). If they have not provided a TFN Declaration (or have provided an invalid one), select TFN not provided on the tax scales.
- ☐ Payroll Tax State: SA

SUPER

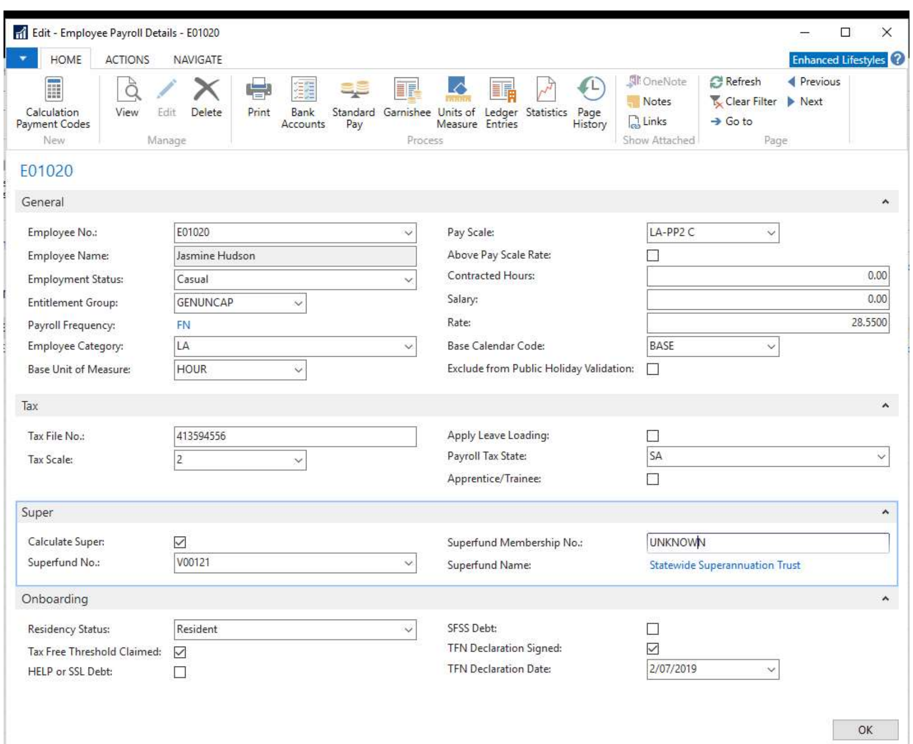
- ☐ Calculate Super: Must be ticked
- ☐ Superfund No: Type in which superfund they are with e.g. HESTA or REST etc.

- If they are using a brand-new superfund (ie. One that no other employees have used and as such has not been added to NAV, you will need to create a new Vendor)

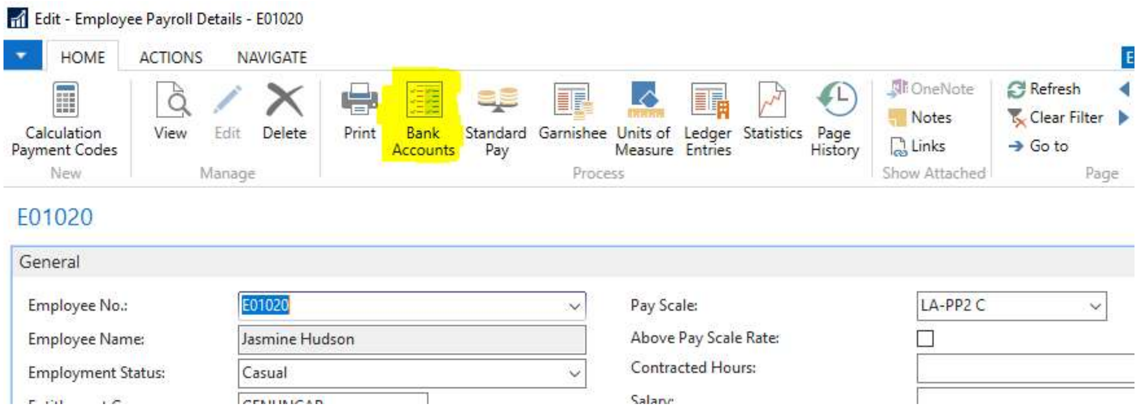
- Super Membership Number: Put their number in
  - Note if they don't have Super and they want to go with our Superfund(STATEWIDE) as they don't have super number you need to put UNKNOWN in the box.
  - **Important:** If their number is greater than 10 digits need to put a # in front of it.
  - If they provide a Superfund, but no member number, this will need to be followed up

ONBOARDING

- Residency Status:
- Tax Free Threshold Claimed: Tick if yes
- HELP or SSL Debt: Tick if yes
- SFSS Debt: Tick is yes
- TFN Declaration Signed: Tick if yes. If not, this requires follow up
- TFN Declaration Date: Add the date the TFN was signed

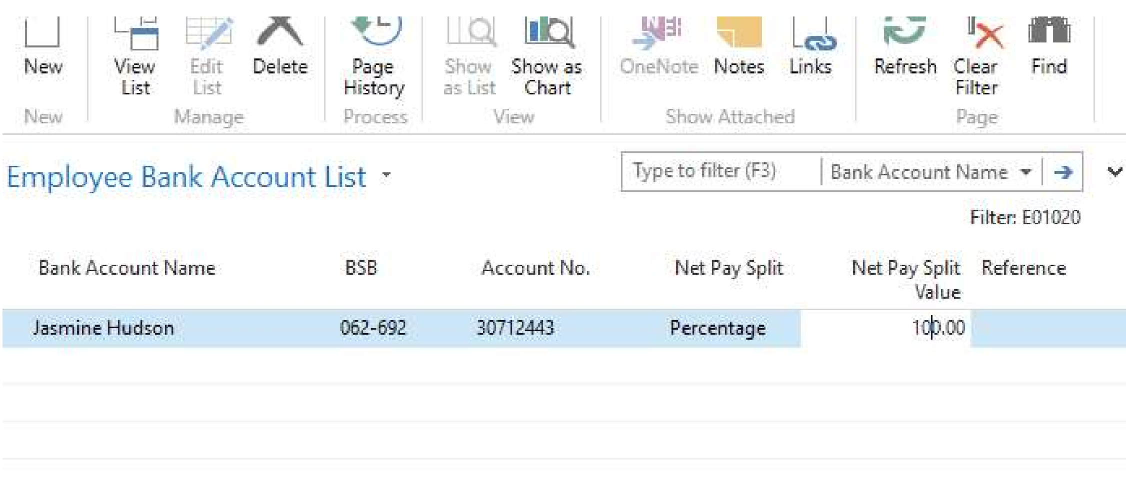


3. Once completed you need to **complete their bank account details**. This button is at the top of the Payroll Card (that you should still be in) – Click the button labelled ‘Bank Accounts’ (see below picture).

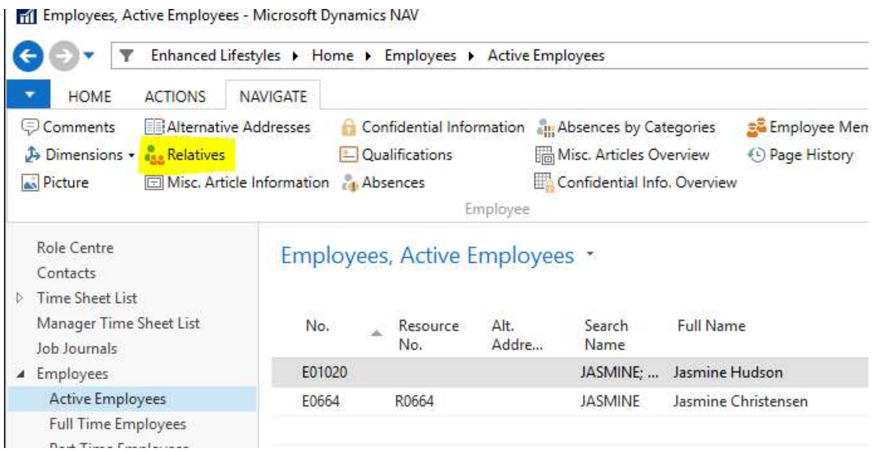


Checklist of what to fill out

- ☐ Name: Type of bank e.g. Commonwealth or ANZ
- ☐ Bank Branch Number: Their BSB – **Always put a dash between the BSB e.g. 510-620**
- ☐ Banks Account Number: No space required
- ☐ Net Pay Split: Change to percentage
- ☐ Net Pay Split Value: 100.00%
- ☐ Press ok when completed and when it takes you back to payroll card.



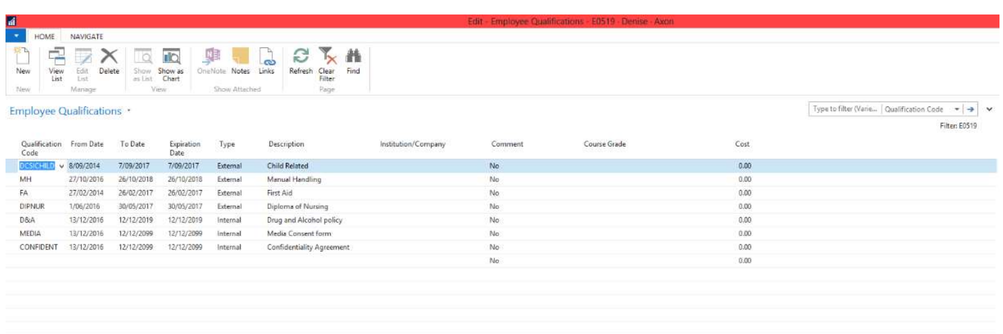
Once Completed you need to **add their Emergency Contacts**. You do this when you are in their Employee Card – You click Navigate on the top panel and click on Relatives, (See below).



Checklist of what to fill out

- ☐ Relative Code: EC (emergency contact)
- ☐ First Name
- ☐ Phone Number
- ☐ CIMS NOK: Click the little box

4. Once Completed you need to **add their qualifications**. You do this when you are in their Employee Card – You click Navigate at the top panel and then click on Qualifications (See below).



In this section, you need to fill out the Employees certificates as seen above:

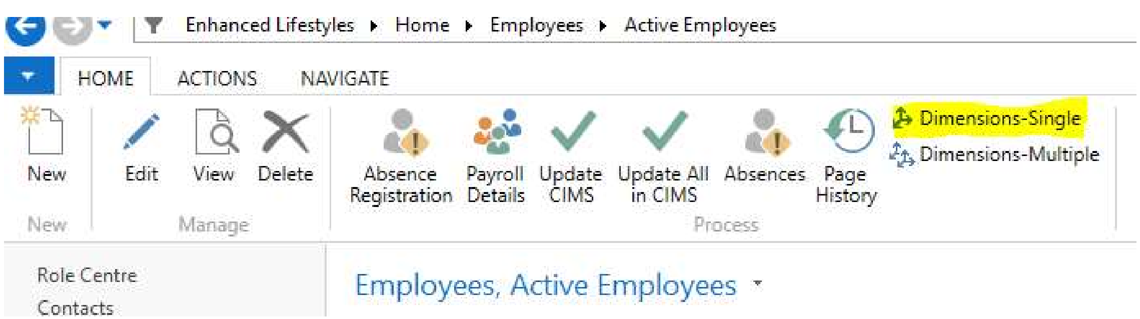
Please note Employees are expected to have the following minimum certificates to be complaint with Enhanced Lifestyles: DCSI (child related): 3 Year Expiry, OR Working with Children Check: 5 year expiry, First Aid: 3 Year Expiry, Manual Handling: 2 Year expiry, CPR: 1 year expiry, & NDIS Worker Orientation Module: no expiry.

Important or non-negotiable qualifications have a 1 in front of them to denote that they are high-priority qualifications.

Any other relevant qualifications can then be added such as Certificate 3 in Disability etc. Once inducted they can have Medication, Peg Feeding, Continence added.

You also will need to add their internal signed policies which includes: Media Consent, Confidentiality & Drug & Alcohol which all have a 2-year expiry.

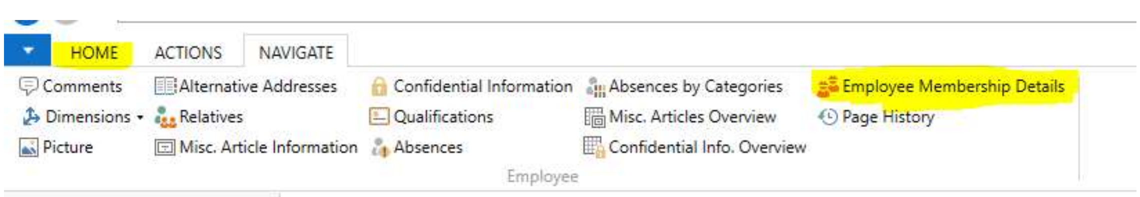
5. Also, in Navigate **adding a photo** of the employee is necessary – Click picture, right click in the box and find picture in their file. Their photo has now been added.
6. Once you have added their qualifications and a photo, you will need to **add their dimensions,** which can be found in the 'HOME' ribbon across the top of NAV (see below)



Checklist of what to fill out

- ☐ Dimension Code: Select 'COST CENTRE'
- ☐ Dimension Value Code: Select the most relevant department the employee belongs to from the drop-down list
- ☐ Value Posting: Select 'SAME CODE'

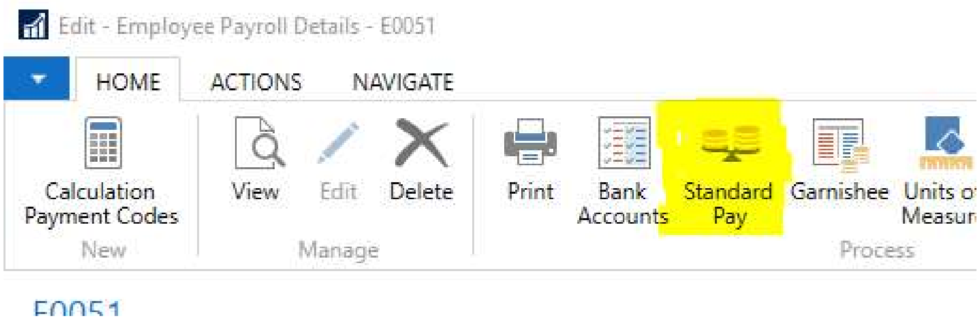
7. Once you have added the employee's dimensions, you will need to **add Employee Membership Details**. This is located in the 'NAVIGATE' ribbon across the top of NAV (see below)



Checklist of what to fill out

- ☐ Membership Code: Add the values 'CHILD' and 'MAXIA'
  - These are to facilitate Child Support and Salary Sacrificing payroll deductions and must be added for all employees, regardless of whether either deduction occurs.

8. For employees receiving a salary **only**, you will need to need to create an entry in their **Standard Pay** card. This can be access from entering the Payroll card, and selecting 'Standard Pay' from the 'HOME' ribbon across the top of NAV (See below)



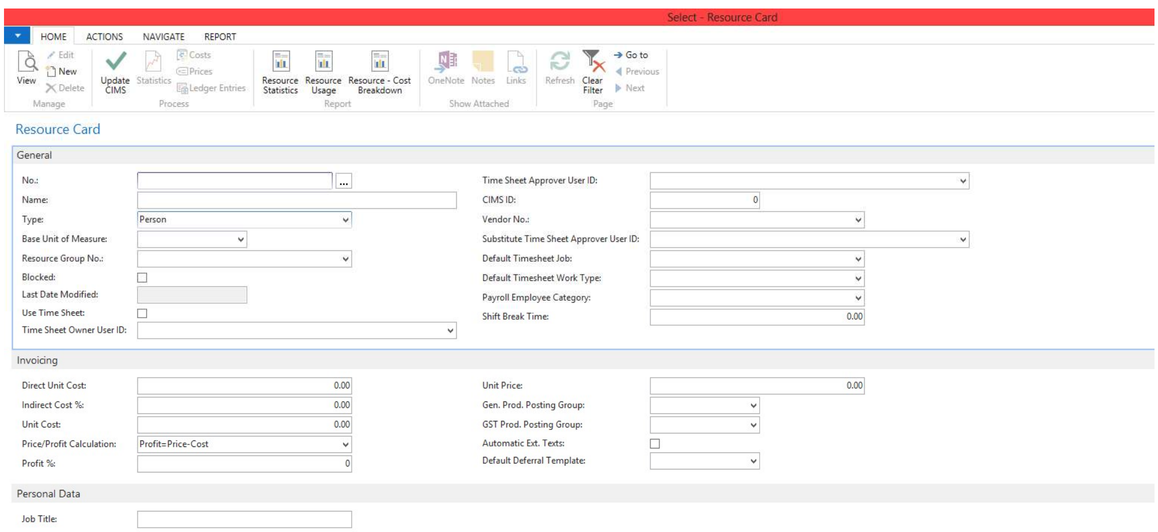
The standard pay is the payment that salaried employees receive every fortnight when payroll is run, and is necessary for payroll to be run properly for salaried employees. Other payments, or on-going payroll deductions (eg. Salary Sacrificing deductions) are also set up here.

Checklist of what to fill out

- ☐ Payment code: NOR
- ☐ Employee Category: Administration or Lifestyle Attendant, as per their payroll card and resource card
- ☐ Entitlement group: GEN, GEN5, GEN6, or GENUNCAP, as per their payroll card
- ☐ Cost Centre: As per the employee's Dimension Value Code
- ☐ Quantity: The amount of hours the employee is contracted to work per *fortnight*. Note- this should be exactly double the employee's contracted hours, as the contracted hours are the amount of hours they are contracted to work weekly, and the quantity is the amount of hours they are paid for (contracted to work) each fortnight.
- ☐ Rate: The employee's hourly rate, as per the payroll card.
- ☐ Line Amount: This will be auto-filled by inputting the Quantity and Rate. This is the total amount that the employee is paid each fortnight *before* deductions such as salary packaging deductions, or income tax.

9. Once you have added a standard pay, if applicable, you will need to ensure that the applicable information contained on NAV is transferred across to CIMS. To do this, click the 'update CIMs' button in the 'HOME' button across the top of NAV (see below)

Creating a Resource Card – NAV Procedure



1. This is the card that helps the pay move across when doing payroll.

P241	EMPLOYEE ONBOARDING PROCEDURES

Checklist of what to fill out

GENERAL

- ☐ NO: Is the Employee Number with R in front for 5 digit employees, and R0 for 3 digit employees e.g. R01020, or R0501
- ☐ Name: Name of employee
- ☐ Type: Person
- ☐ Base Unit of Measure: HOUR
- ☐ Resource Group No.: Select the correct pay scale (this must match up with the pay scale on their payroll card) for LAs and Casual SDOs. For other office/admin employees, select ADMIN
- ☐ CIMS ID: Their unique CIMS number – this is what links NAV and CIMs to one another and populates information for coordination and rostering etc.
- ☐ Payroll Employee Category: Select either Lifestyle Attendant or Administration
- ☐ Shift break time: Input a value of 0.50 for all office employees who work more than 5-hour days – this is their daily 30-minute break.

INVOICING

- ☐ Direct Unit Cost: For casual employees (probably office/admin) who do not have a designated pay scale (eg. LA PP2 C, or SDO CAS), input their hourly rate. This will fill the ‘Unit Cost’ value also.
- ☐ Gen Prod Posting Group: Resource
- ☐ GST Prod Posting Group: GST 10 Inclusive

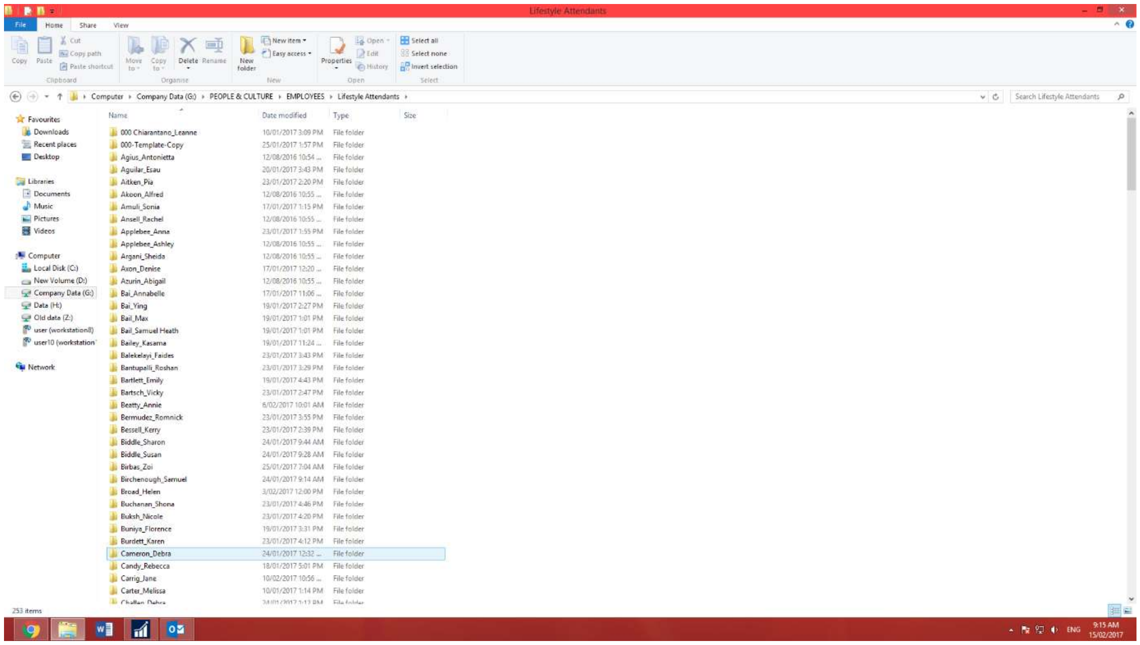
PERSONAL DATA

- ☐ Job Title: Employee title (e.g. Lifestyle Attendant, Service Delivery Officer, Administration Officer)

Once complete click ok and it should set in that box their resource number. This will now link when they are being paid.

CAUTION: When adding or editing resource cards, take care to ensure that you do not accidentally select another person’s resource card or swap them around. This may cause issues when running payroll.

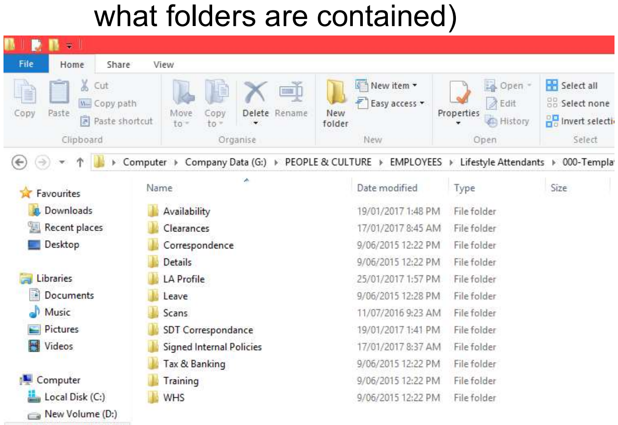
Adding the Employee into: File Explorer



Under G Drive/People & Culture/Employees/Lifestyle Attendants (see below)

Instruction

- Create a new folder and name it as the Employees last name & first name e.g. Holmes_Leonie
- You then click into the folder that says 000-Template-Copy (see below to see what folders are contained)



- Highlight all these folders (which are empty folders) and select copy. Then go back and select the New Employee and paste the folders into their folder. This enables you to add their information into the folders

WHAT GOES INTO EACH FOLDER

Note: All files must be named using the following format: yearmonthday_File Name

e.g. 20180614_TFN Declaration

- Contract – Signed employment contracts
- Correspondence – Any emails, communication etc that has been sent through from the LA, or correspondence that has been sent to the LA from an Operations Team Member (eg. Reminders that qualifications are due to expire)
- Details – Application for Employment, Resume, VISA, Passport, Drivers Licence, Wage Subsidy Agreements etc
- LA Profile – LA profile questionnaire and a photo of themselves
- Leave – Any leave details, Annual leave, Leave Forms
- Performance Management – Details of any performance management matters or issues, e.g. Employee Offence Forms, correspondence regarding performance management issues, any relevant evidence of insubordination
- Signed Internal Policies: Media Consent, Confidentiality Agreement, Code of Conduct Agreement, Drug & Alcohol Policy, Position Description
- Tax & Banking – TFN Declaration, Superannuation Forms & Bank Details
- Training – All Certificates including First Aid, Manual Handling, Certificates in Disability, Medication etc.
    - Note: Label the relevant certificate & put the date they completed it e.g. 20180202 First Aid
    - Note: DCSI Clearances must not be stored here – Privacy laws prohibit the organisation from storing these records electronically.
- WHS – Any material or forms relating to incidents, work cover information, WHS forms, injury details etc.

Sending a Profile to Coordination – Including a Photo

1. The LA Profile sheet that was saved in the LA folder in GDRIVE need to be sent to coordination with their photo to show their availability. Add this to an email with the filled out sheet and send to the Service Delivery Team. This allows the SDT to select appropriate Members the new LA can work with.

Following up with an email to new LAs

Use the email template to send an email to LAs that includes Teleclock information, CIMs information, general information about where they go from here re: shifts, and contact information sheet.