DNet 2.0

Client User Guide

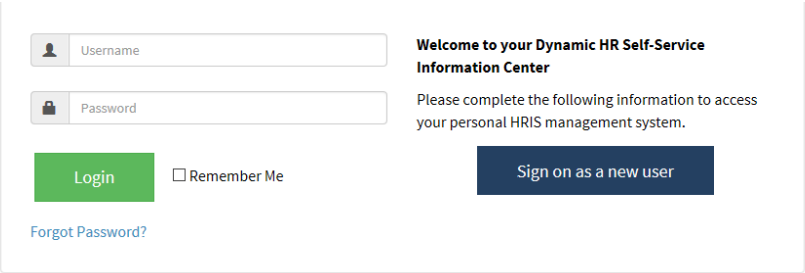
Getting Started 4
Logging In 4
Forgot Your Password 4
Navigation in DarwiNet 6
Dashboard / Client Welcome Page 12
Company 20
Information 20
Setup 23
Tools 45
Employees 49
List 49
Snapshot 52
On-Boarding 54
ThinkHired 54
Payroll 57
Invoices 57
Payroll 66
Payroll 66
Human Resources 81
PTO 81
Training 85
Reviews 88
Licenses 90
I-9 92
FMLA / LOA 95
Library 99
Document From > Service Provider to EE 99
Document From > Service Provider to ME 99
Document From > Company 99
Employee Documents > Attachments 101
Employee Documents > Onboarding 101
Benefits 102
ACA 102

Enrollment 106
Reporting 115
Quick Lists 115
Reports Center 124
Other 125
Report Writer 126
Export Solutions 126
Insight 127
Dashboard 127
Payroll: Gross Wages 131
Payroll: Hours 132
Payroll: Summary 133
Invoicing: Details 134
Invoicing: History 134

Getting Started

Logging In

When you go to the appropriate web page to log into your web portal, you should see a screen similar to the one below:

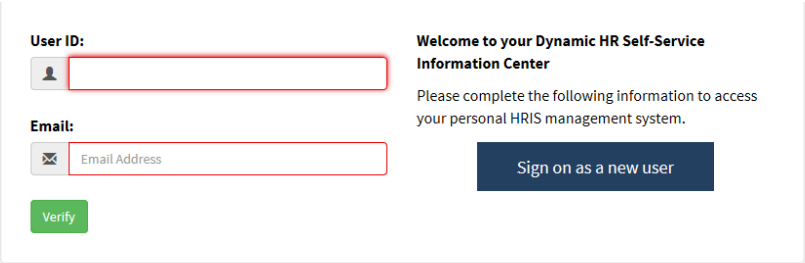


Enter the User ID and Password that has been provided to you (by your PEO / ASO) into the appropriate fields.

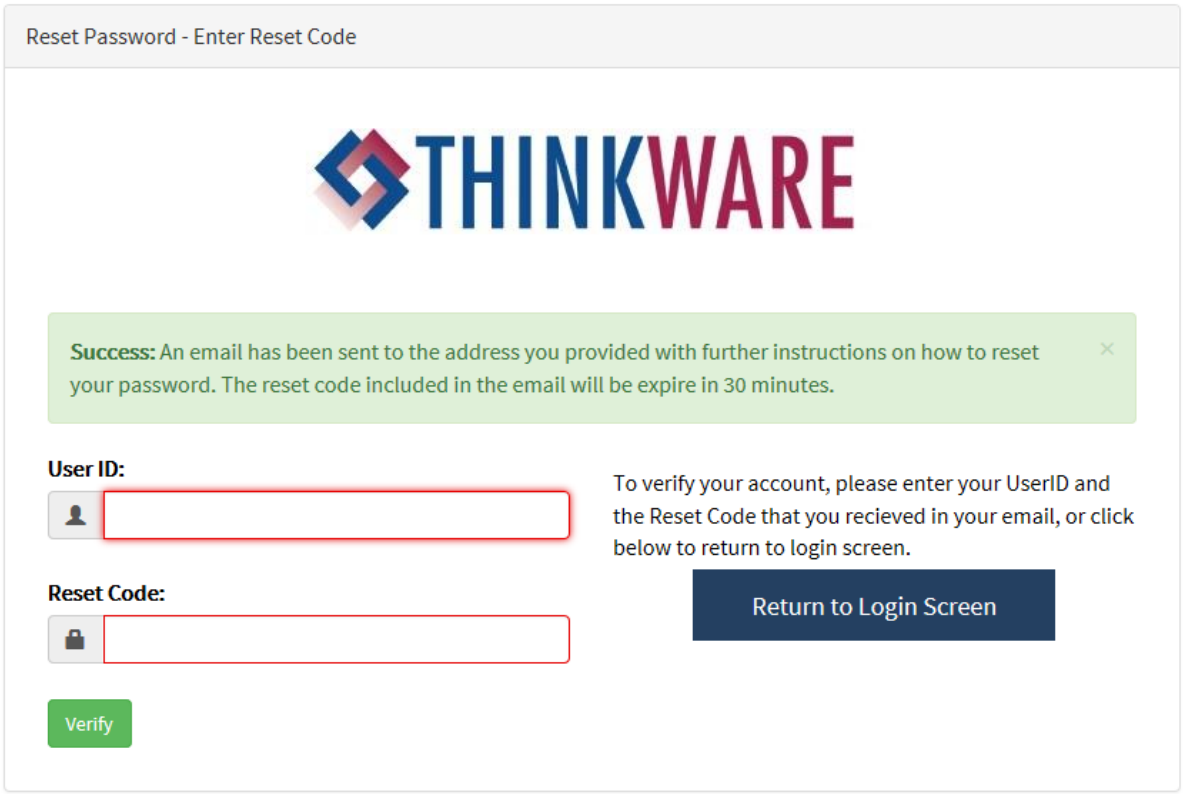
Forgot Your Password

If you have forgotten your password, click on *Forgot Password?* on the log in page (under the green colored Login button - see screen shot above for reference).

After you click "Forgot Password?" you will see a new screen (see example below). On this screen, enter your employee ID and your email address. Then click the green colored "verify" Verify button.



After you click this "verify" button, you will see a screen like the one below.

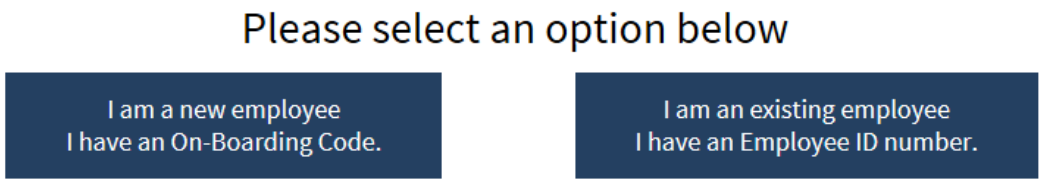


Note: The parameters for a valid password are:

1) Cannot match the username
2) Must be between 8-15 characters in length
3) Must contain 1 Uppercase letter
4) Must contain 1 Lowercase letter
5) Must contain 1 Numeric character

On the main log in screen, if you elect to "Sign on as a new user" you will be directed to put in an Employee ID number (provided by your employer) or an On-Boarding code that will take you to the On-Boarding process (see sample screen below). Once the On-Boarding process is completed, you will be provided a User ID and password.

Note: When you enter the Employee ID number do not use dashes (e.g. use 010011000 not 01-001-1000)



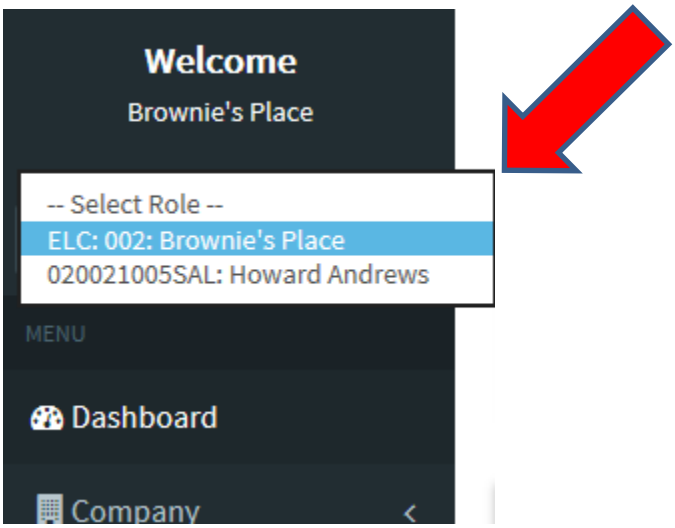
Navigation in DarwiNet

This section of the help documentation notes navigation elements (e.g. drop down boxes, search capabilities, setting preferences).

Note: Many of these navigation items are similar for system users, client users (for which this documentation is written), and employee users.

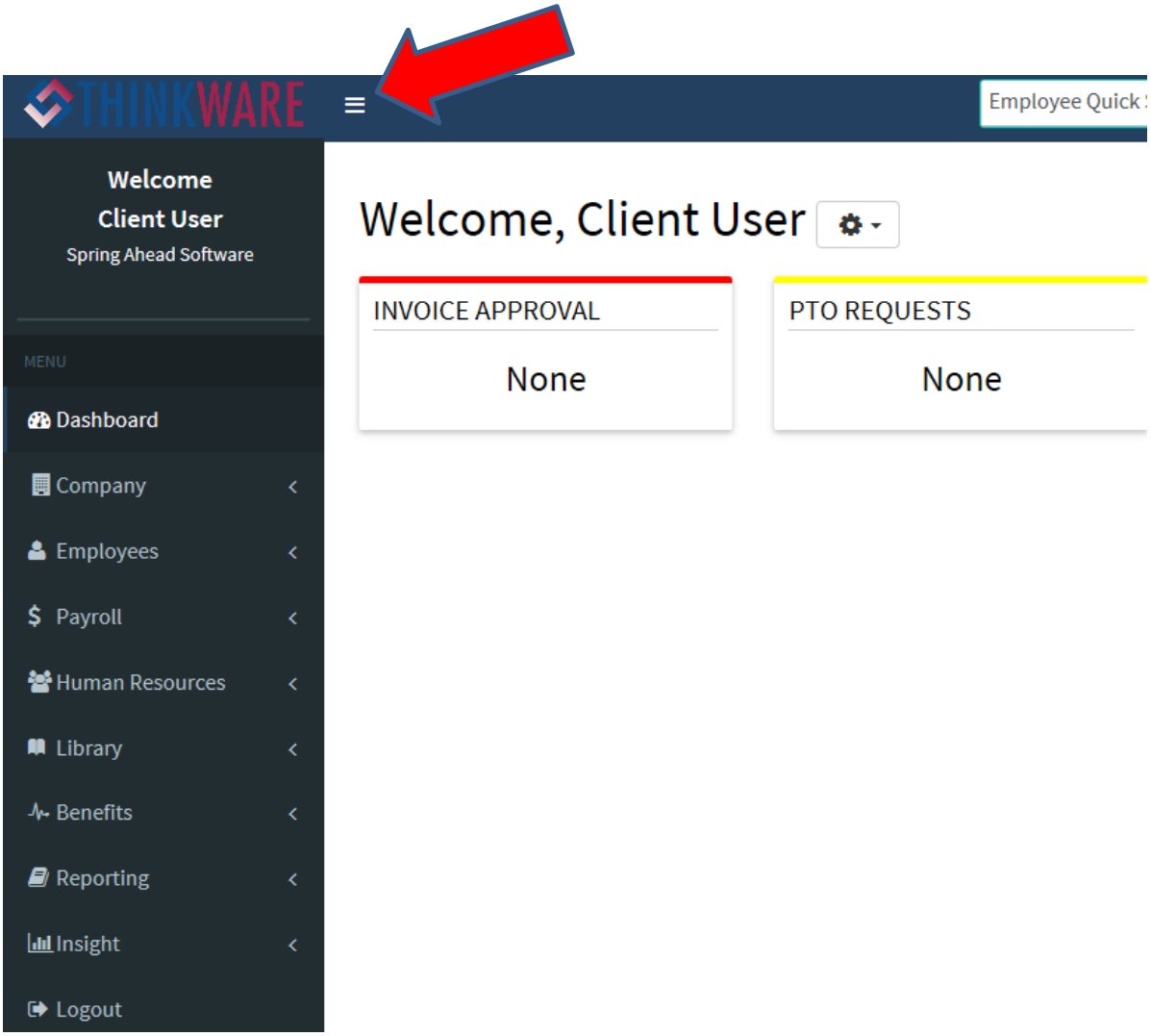
Access Drop Down

The 'Select Role' drop down in the upper left can be used to switch between all access levels that are available to the user.



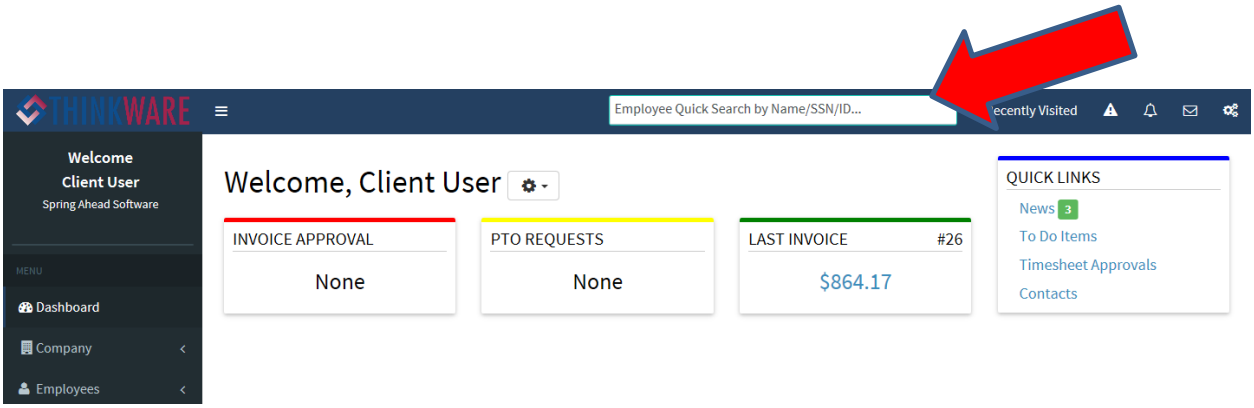
Collapse

In order to create more space on screen, the main menu can be collapsed using the triple bar icon in the top nav bar. The menu items will revert to icons only.

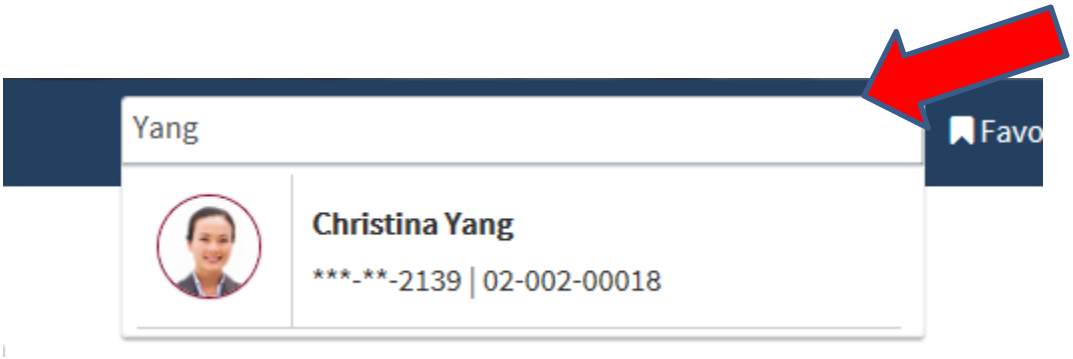


Search

The Employee Quick Search bar (on the top navigator) can be used in order to quickly locate a specific individual based on Name, Social Security Number, or Employee ID.



Below is an example of what you see after you type in a last name (Yang in this example).



Recently Visited

Select the Recently Visited link from the top navigator to access recent pages.

Alerts

Select the Alerts icon from the top navigator to view items that require the user's attention.

Notifications

Select the Notifications icon from the top navigator in order to view items of interest.

Messages

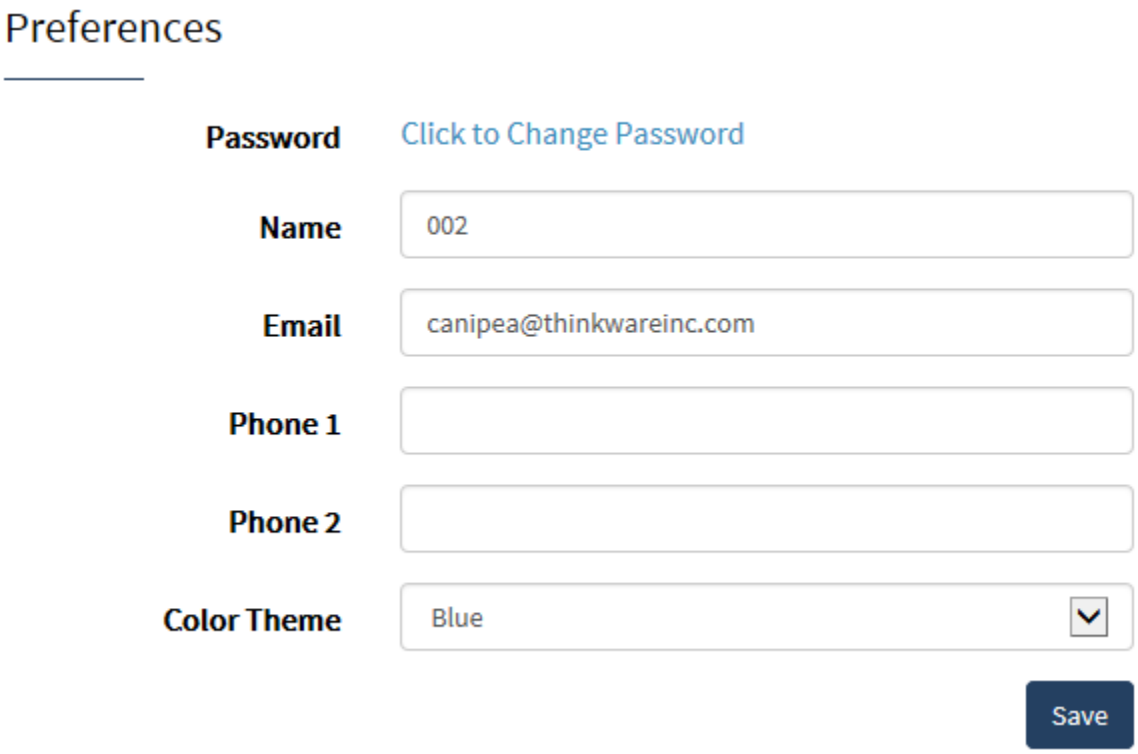
Select the Messages icon from the top navigator in order to access various system messages.

Settings

Select Settings Icon from the top navigator to access Preferences, Help, or Logout.

Preferences

The Preferences page can be used to edit contact information, and to change the Color Theme.



To change the Color Theme, Select the desired theme from the drop down and click the Save button.

Help

The help function brings up the user documentation to provide guidance on the use of this application.

Logout

The Logout option is accessible from the Settings drop down, and also the bottom of the menu on the left. This will return the user to the Login screen.

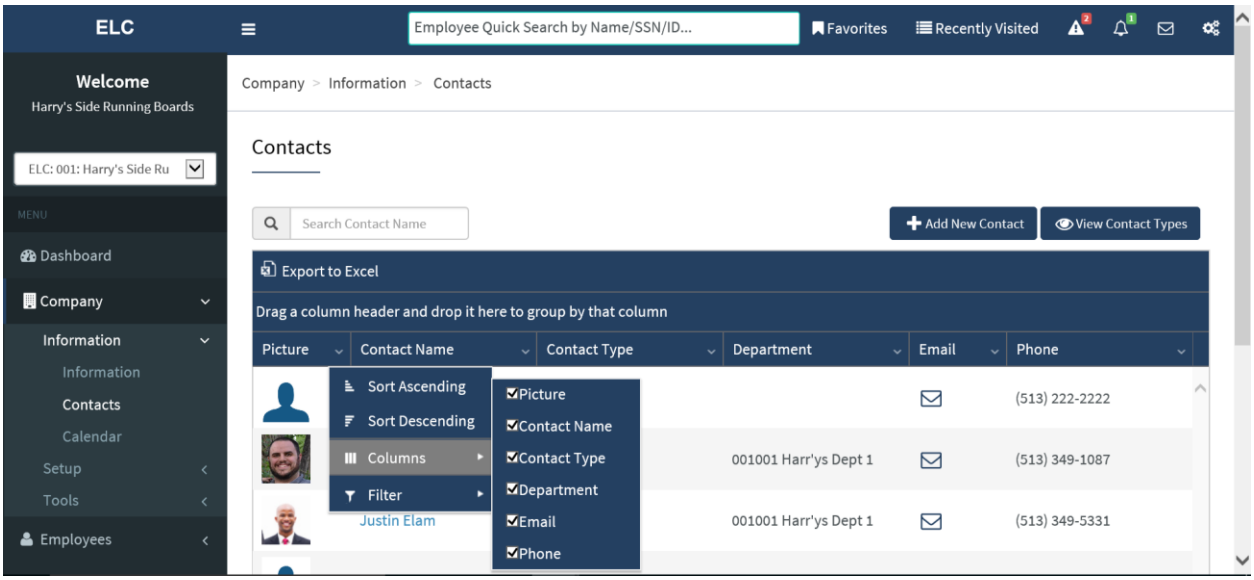
Export to Excel

Several pages have the option to import data into Excel. This can be done using the Export to Excel button on the page. This will allow you to save the data as an Excel spreadsheet.

Columns & Filters

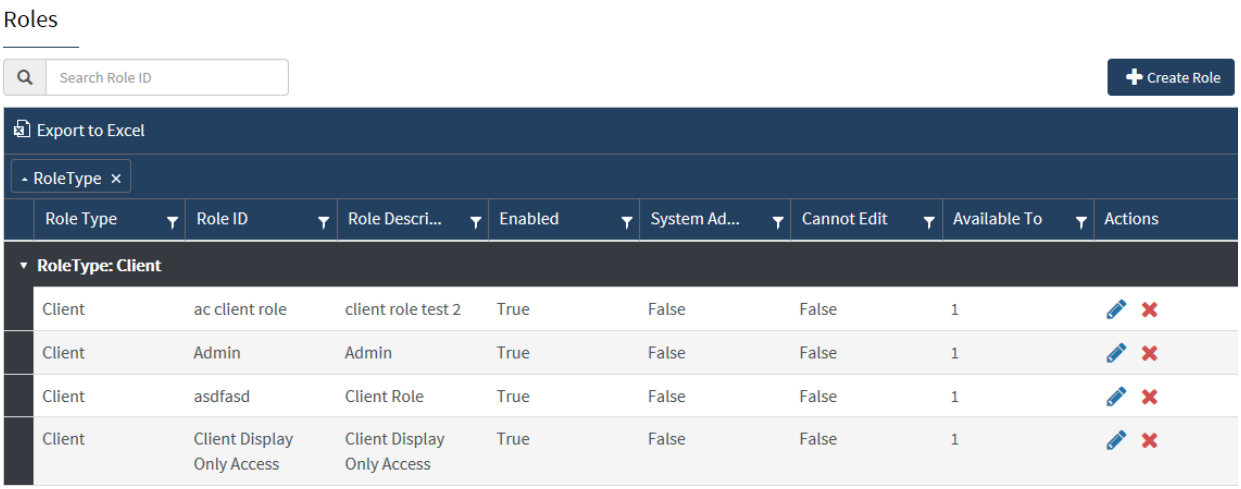
On views that have columns, some of the views provide the choice to remove a column from the view (see screen shot below) by un-checking the box next to the column.

Also, as can be seen from the picture below, you can sort and filter on the columns.



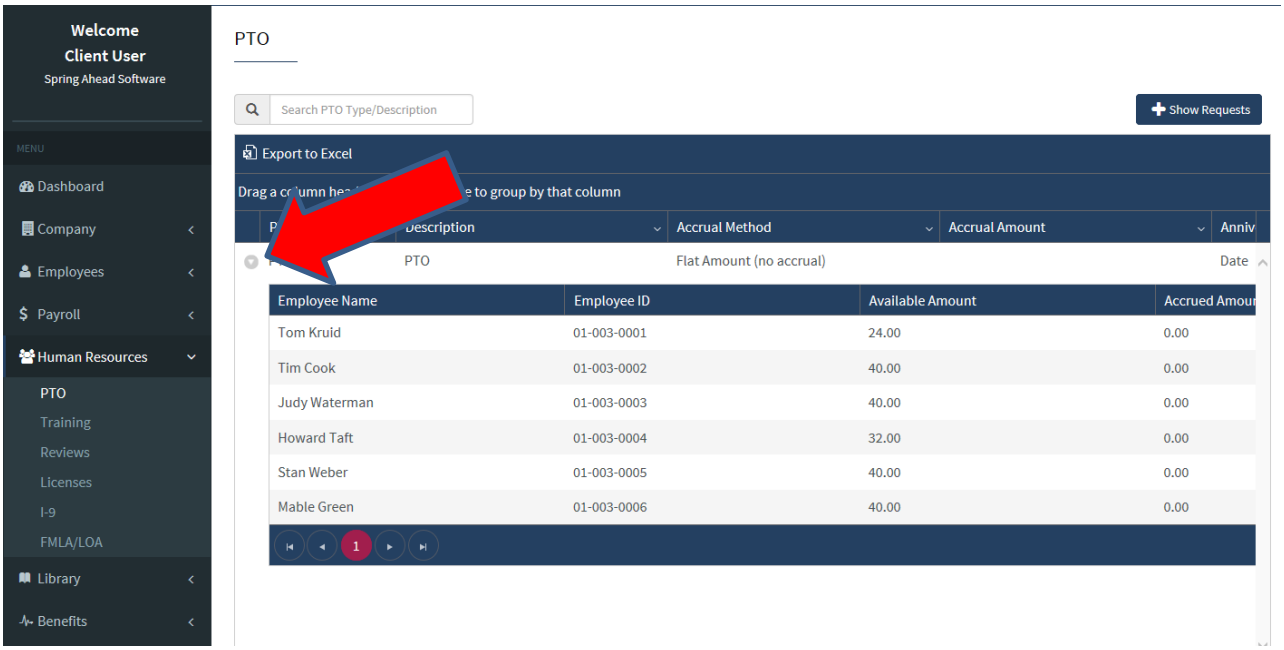
Drag & Drop

On certain grids, column headers can be added to the header section titled 'Drag a column header and drop it here to group by that column'. This can be done with multiple column headers, and will sort the data appropriately.



Expand

On some pages, you will have an arrow to the left of a row. When you click on the arrow , the row expands to provide additional information. See example of an expanded row below.



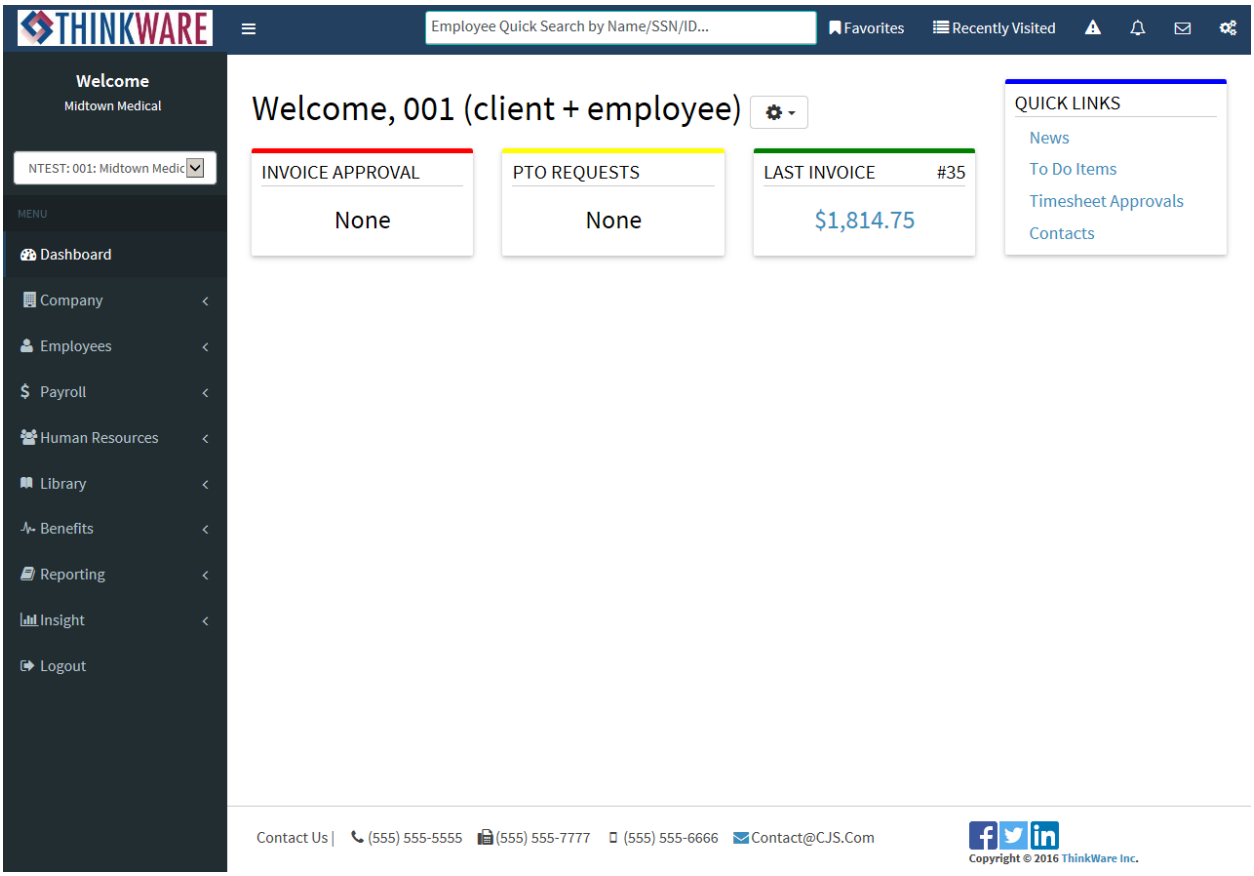
Notes / Attachments

Some of the documents have a notes / attachments option. Click on this icon to view or add a note or attachment

Dashboard / Client Welcome Page

After you successfully log in, you will be presented with the dashboard screen. This dashboard displays key summary of information. It is designed to provide you quick access to the most common information you want. You can customize it to your needs.

Below is an example of a standard dashboard screen (before you customize it for your needs).



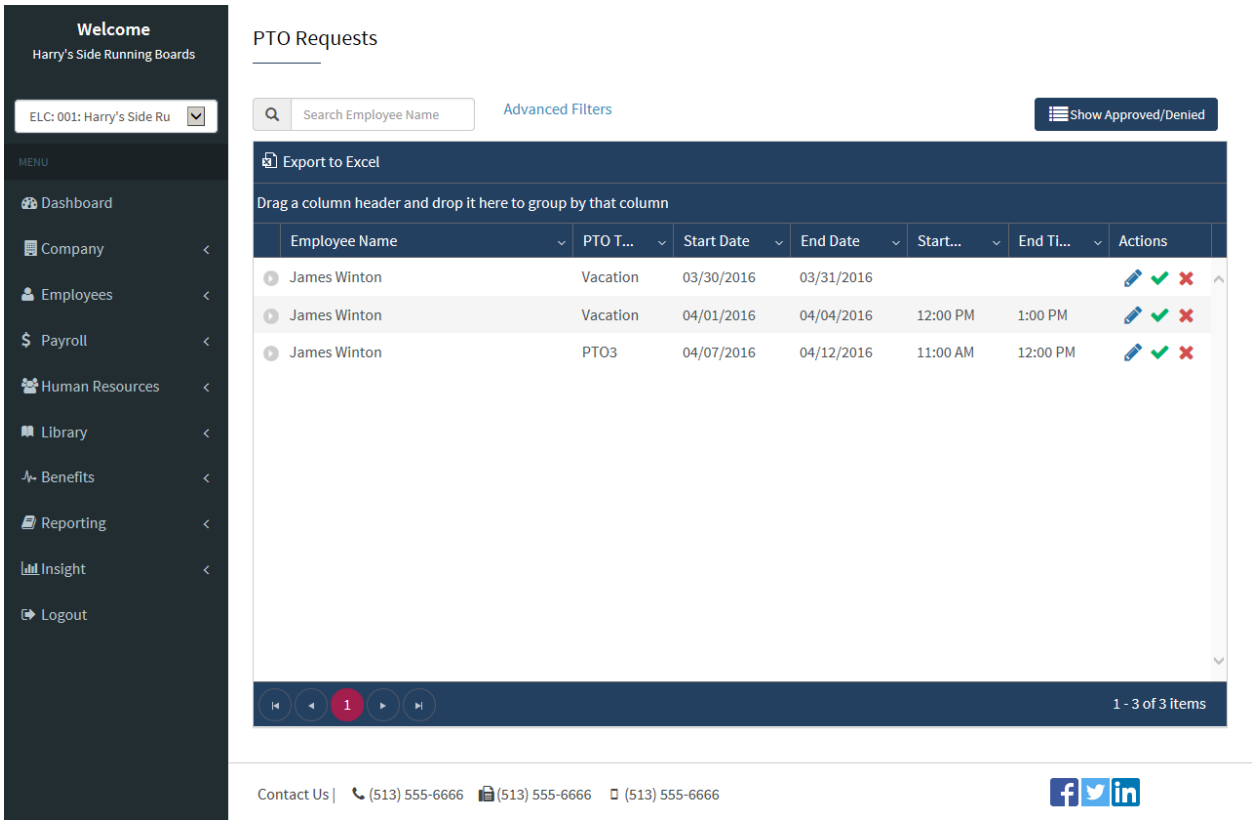
The seven items on the standard screen are invoice approval, paid time off (PTO) requests, your last invoice, news and announcements, to do items, time sheet approvals, and contacts. These seven items are not designed to be removed from the dashboard.

Note: Some users may be set up to not have access to the dashboard widgets - in which case they would have a blank dashboard with none of the seven standard items and no ability to add other widgets.

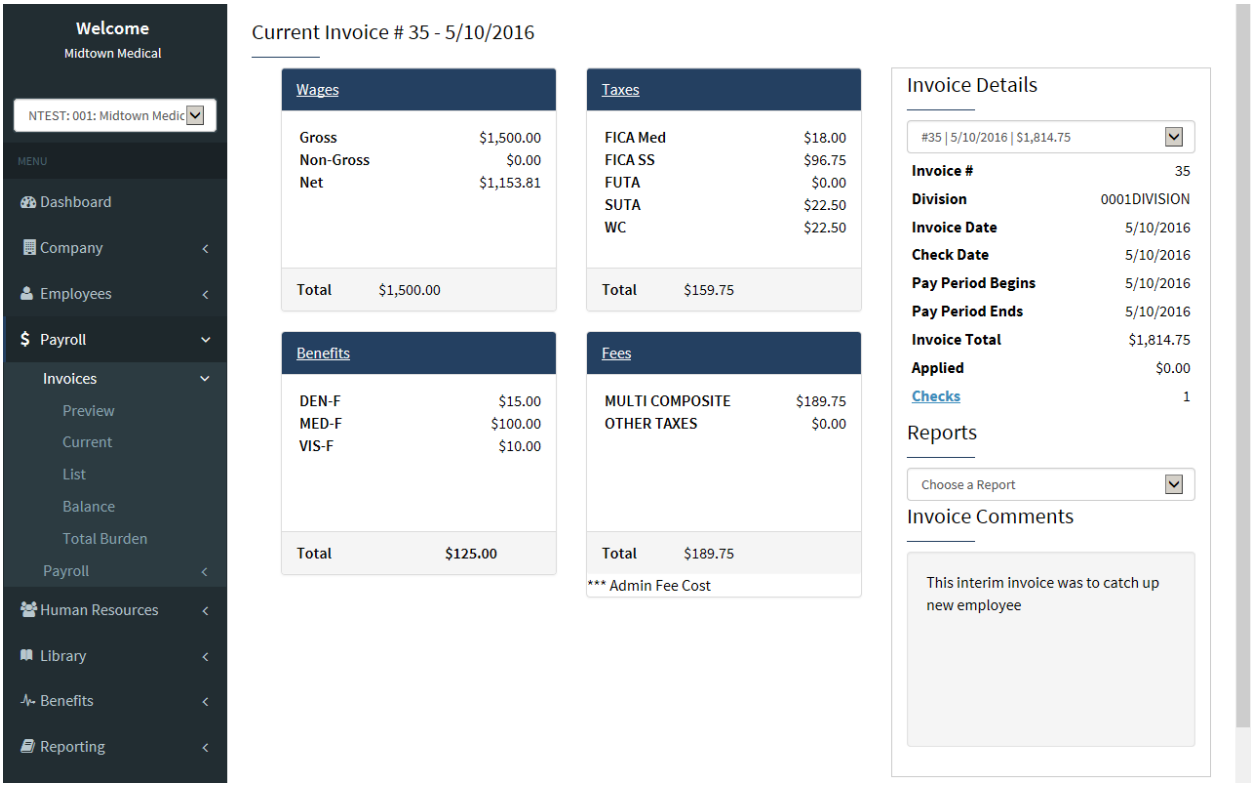
Invoice Approval — This lists any invoices you need to approve. If there are none, you will see the word "None" in this box. If there are one or more invoices to approve, you can click on the number in the box to have the invoices presented to you. In this next screen you can decline or approve an invoice.

PTO Requests — Any pending requests for paid time off are listed here. When you click on the pending requests, you will see a screen similar to the one below. In the actions column, you can edit the request, approve it, or deny it. Also, if you click on the arrow next to the name, you will see more details on this request.

Note: When you elect to edit the document by clicking on the pencil icon , you can edit whether it is a full day or part of a day. For a partial day, put in or edit the start and end times and add any appropriate comments if necessary. All or some of the data in this form is completed when an employee submits a PTO request in their DNet application.

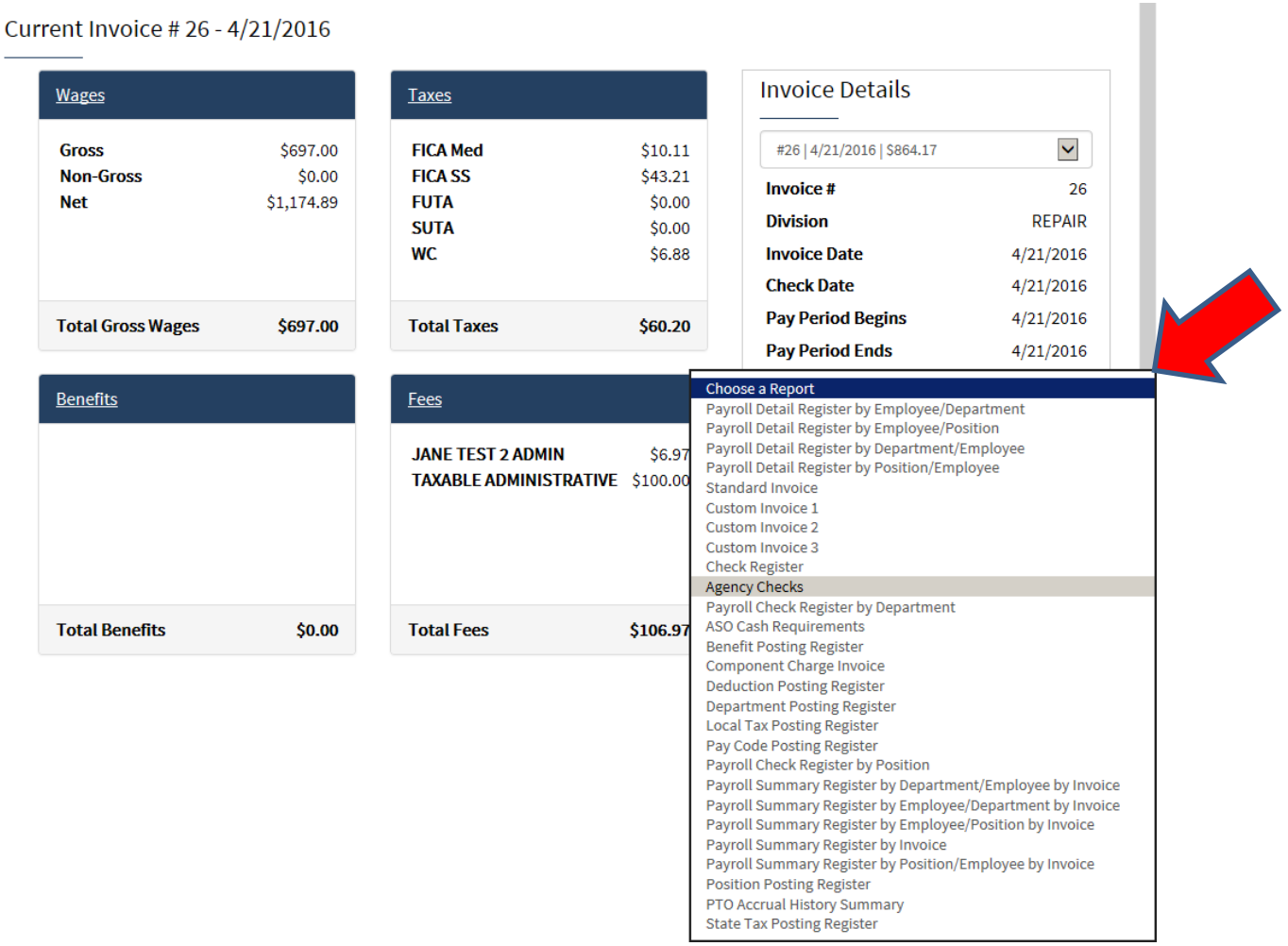


Last Invoice — This is your most recent invoice that has been processed. When you click on the amount / number in the box, the invoice will be presented to you on your screen. A sample of what you will see when you click on the amount / number in the box is in the graphic below.



Note: When you click on the active links (Wages, Benefits, Taxes, Fees, and Checks) in this "last invoice" page (screen shot above), additional documents and details will appear at the bottom of the page.

Note: In the "Reports" section, you can choose to get a print out a report from a selection of options in the "Reports" section by selecting an option from the drop down menu there. See screen shot below for more clarity.

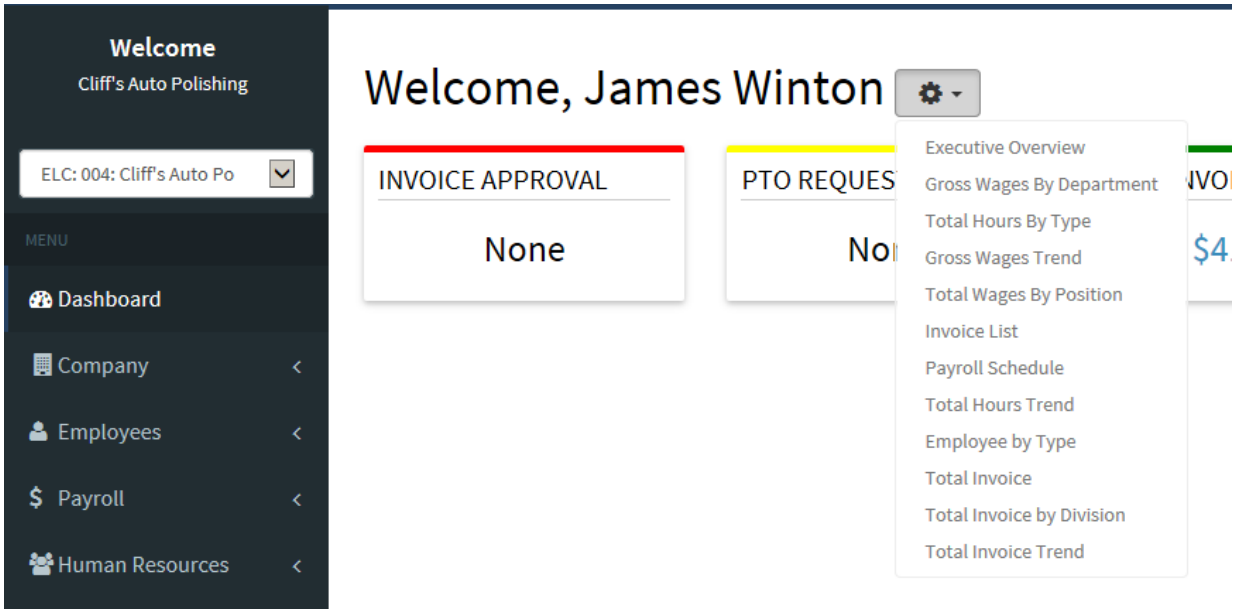


Quick Links

News Items	Company announcements and company news items
To Do Items	When you click on this item, you will see action items for your completion. Normally, these actions are created as a result of change made to payroll information.
Timesheet Approvals	When you click on this item, you will see time sheets that are waiting approval.
Contacts	This will take you to contacts.

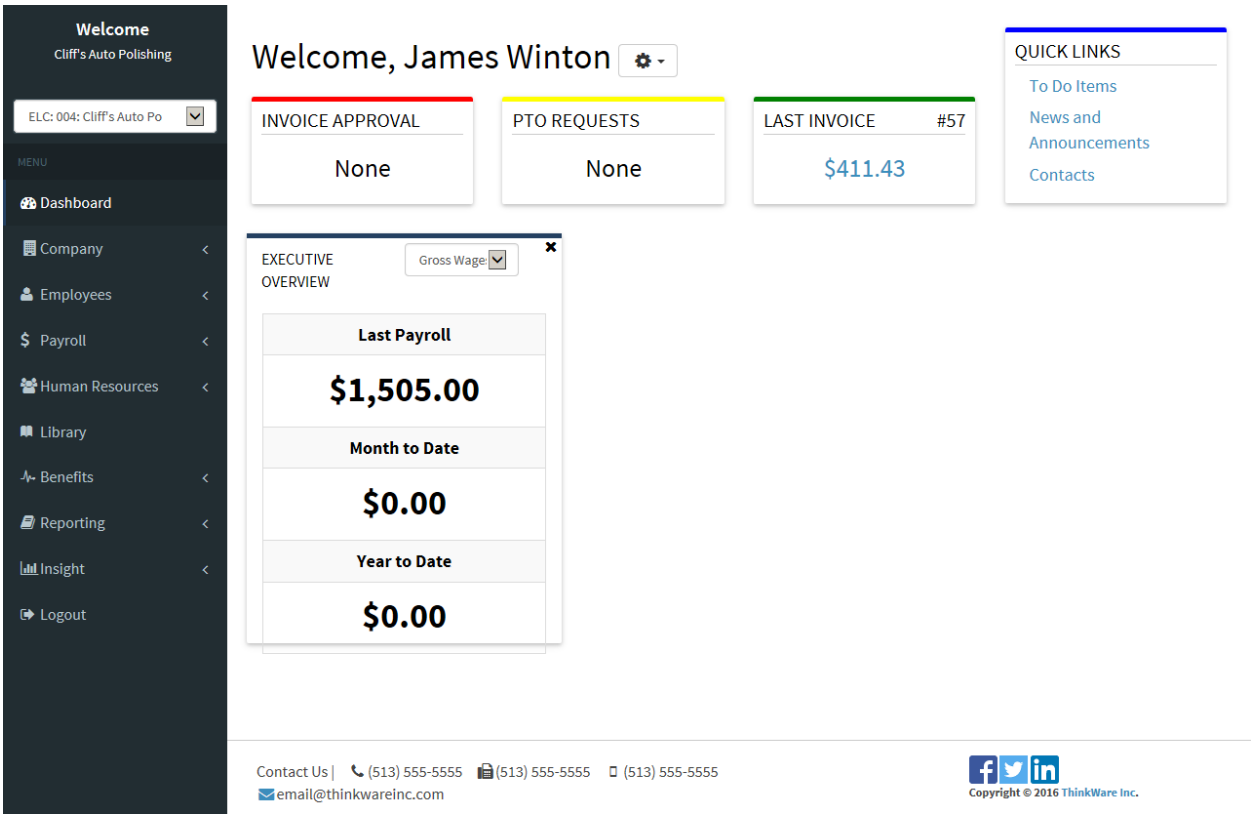
Customizing Your Dashboard

The drop down menu on the gear icon to the right of your name at the top of the Dashboard (e.g. Welcome, James Winton) shows you the widgets (e.g. graphs, charts) you have available for adding to your dashboard screen. See an example below of the drop down choices. Click on one of the options and it will appear in your dashboard. To remove a widget from your dashboard, click on the X in the top right corner of the dashboard item.

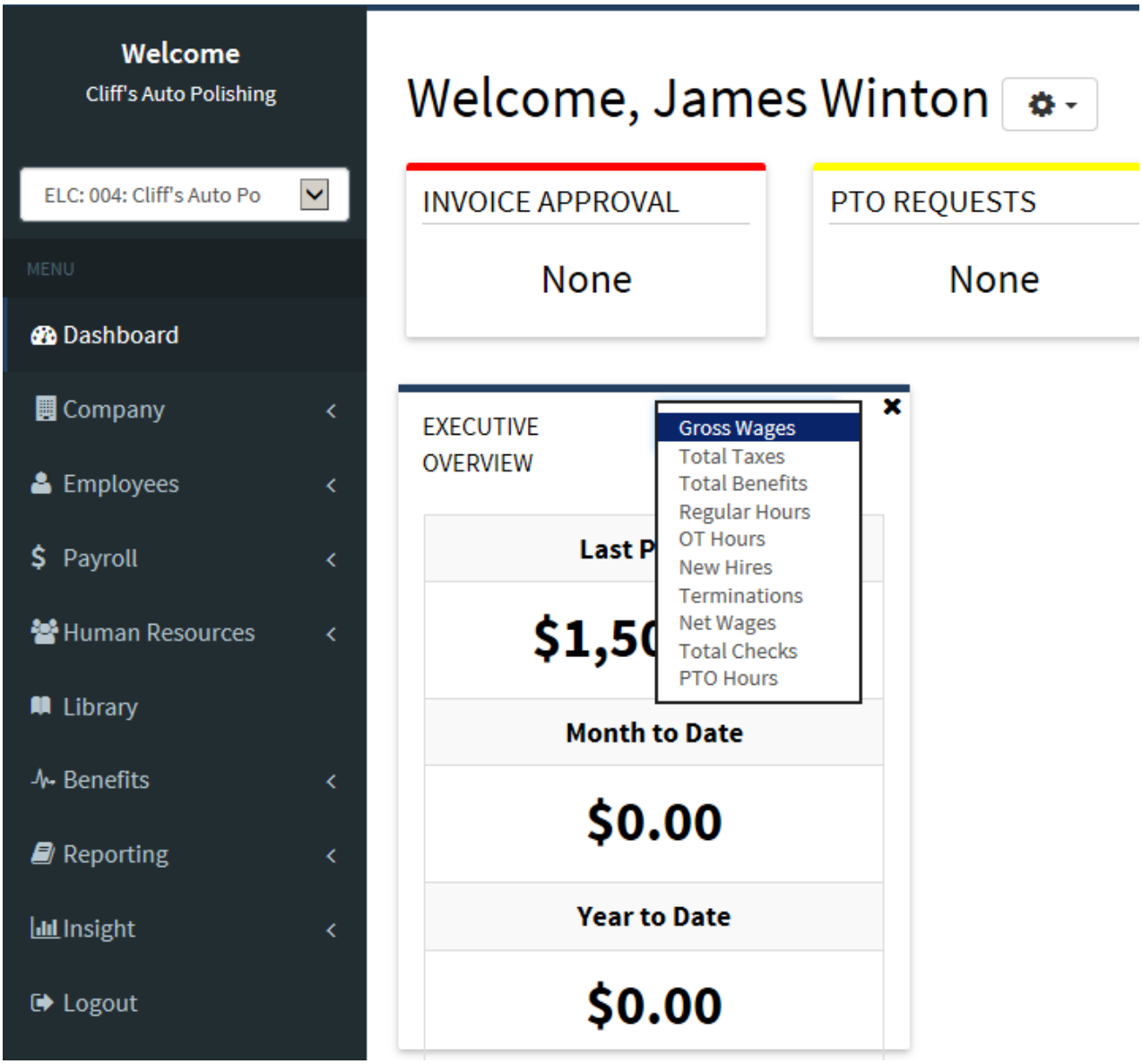


EXECUTIVE OVERVIEW

The first option for adding an additional graph is the Executive Overview. A sample screen shot of an Executive Overview screen is shown below.



This view also has a drop down menu with options for your use. When you click on one of the options (e.g. Gross Wages), the information in the Executive Overview screen will change based upon your selection. The options include Gross Wages, Total Taxes, Total Benefits, Regular Hours, OT Hours, New Hires, Terminations, Net Wages, Total Checks, and PTO Hours. See graphic below to see an example of the drop down menu in the Executive Overview.



Executive Overviews - Views

Each of the views shows figures for the last period (since the last payroll), month to date, and year to date.

Gross Wages	List of amounts for gross wages
Total Benefits	Amounts of benefits for the payrolls
Regular Hours	Tally of normal hours (e.g. not overtime)
OT Hours	Amount of overtime hours
New Hires	Number of new hires in the respective periods
Terminations	Total of individuals terminated

Net Wages	Gross wages in that period less taxes and deductions
Total Checks	Total number of checks
PTO Hours	Number of hours of paid time off

Note / Reminder: If a manager does not want this information available to certain (or all employees), the manager can set up the system to disallow any employee or employees access to the dashboard.

Additional Dashboard Options (graphs and charts to add)

Gross Wages By Dept.	This graph provides a breakdown of wages by the departments.
Total Hours By Type	This graph breaks out the total hours by type of pay (e.g. regular, overtime).
Gross Wages Trend	This illustration provides insight into the trend of the total wages your company has paid.
Total Wages by Position	In this diagram, you can see a breakdown of the total wages by the positions in your organization.
Invoice List	This chart displays the five (5) most recent invoices. Clicking on the invoice number (# field) will take you to that invoice.
Payroll Schedule	This view shows the schedule you create (in Darwin software) for processing payrolls. You can click on View Schedule to get more details.
Total Hours Trend	You will see the trend for number of hours worked by the type of worker in this graph.
Employees By Type	This pie chart gives you a data visualization of your employees broken down by the category (e.g. full time, part time) of their job.
Total Invoice	This graph shows you the total amount of your invoices for a chosen period of time.
Total Invoice By Division	This breaks down your invoices by the divisions in your company.
Total Invoice Trend	Here you can see trends for the invoices paid

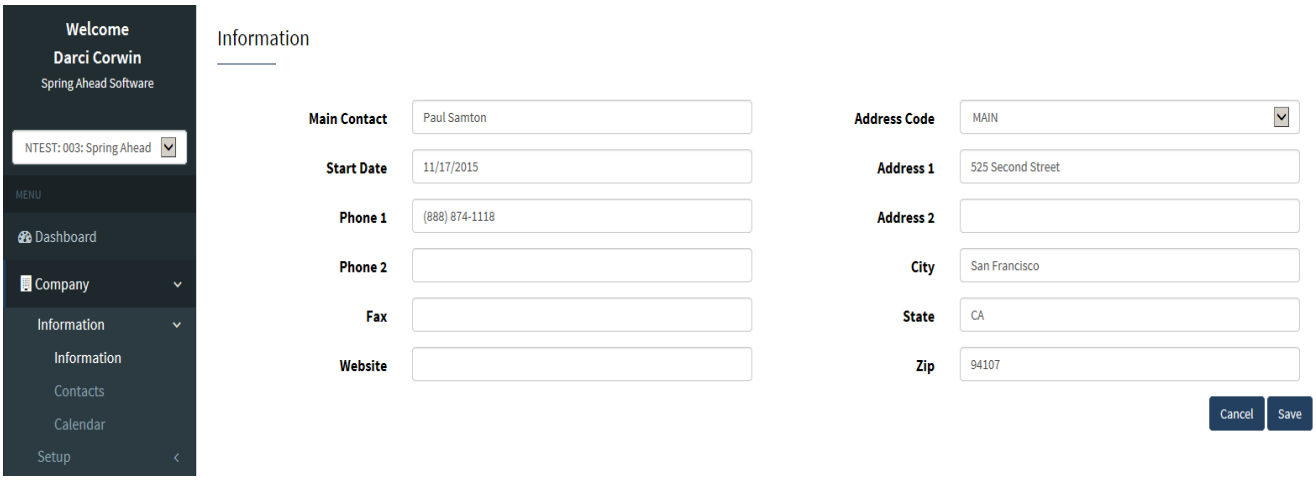
Company

Information

Information

Path: Company > Information > Information

The purpose of the information screen is to contain general information pertinent to your clients company.



Key Items:

Main Contact This field lists the main contact person for this company

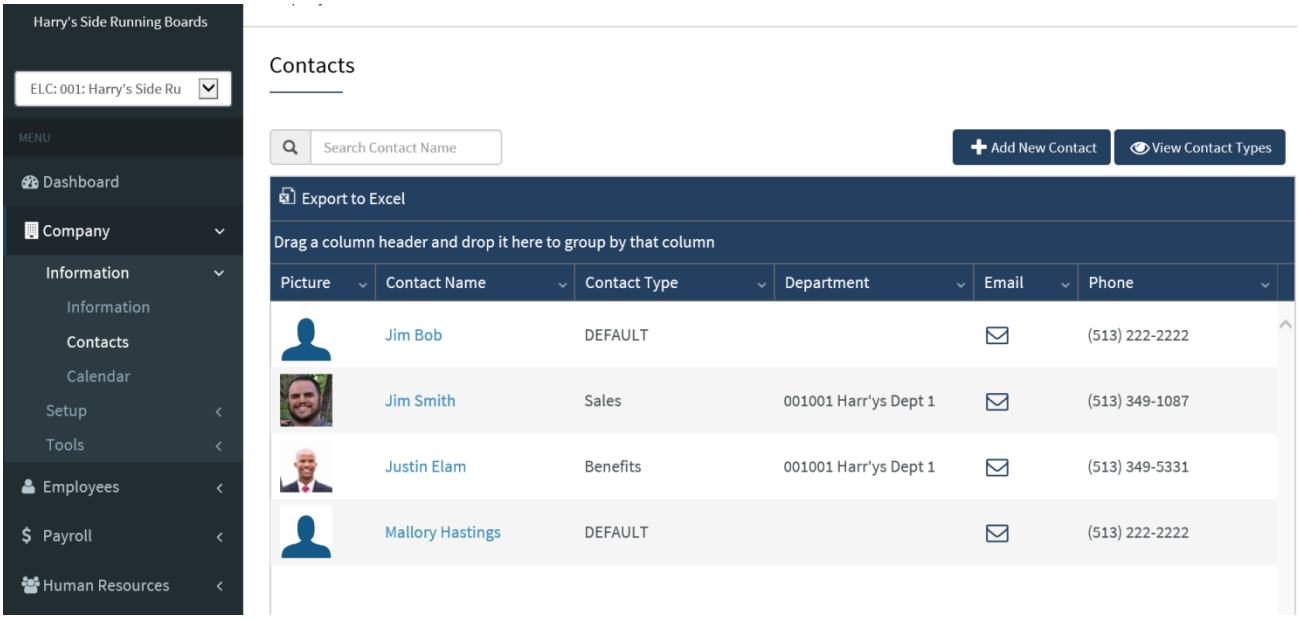
Start Date This is the date you began servicing this client.

Website This field is for noting the client's main web site URL.

Contacts

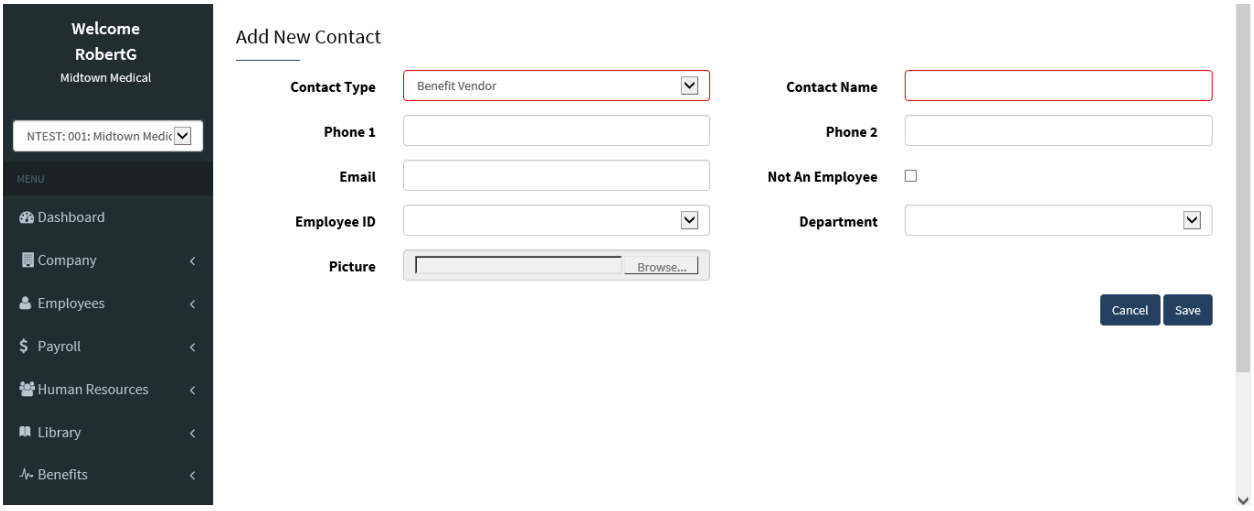
Path: Company > Information > Contacts

The contacts screen is used for display and adding of contacts. These contacts can be referenced when employees have questions about Payroll, Benefits, or HR. Contact Types can be created to specify the area for which that person would be contacted.



Adding a Contact

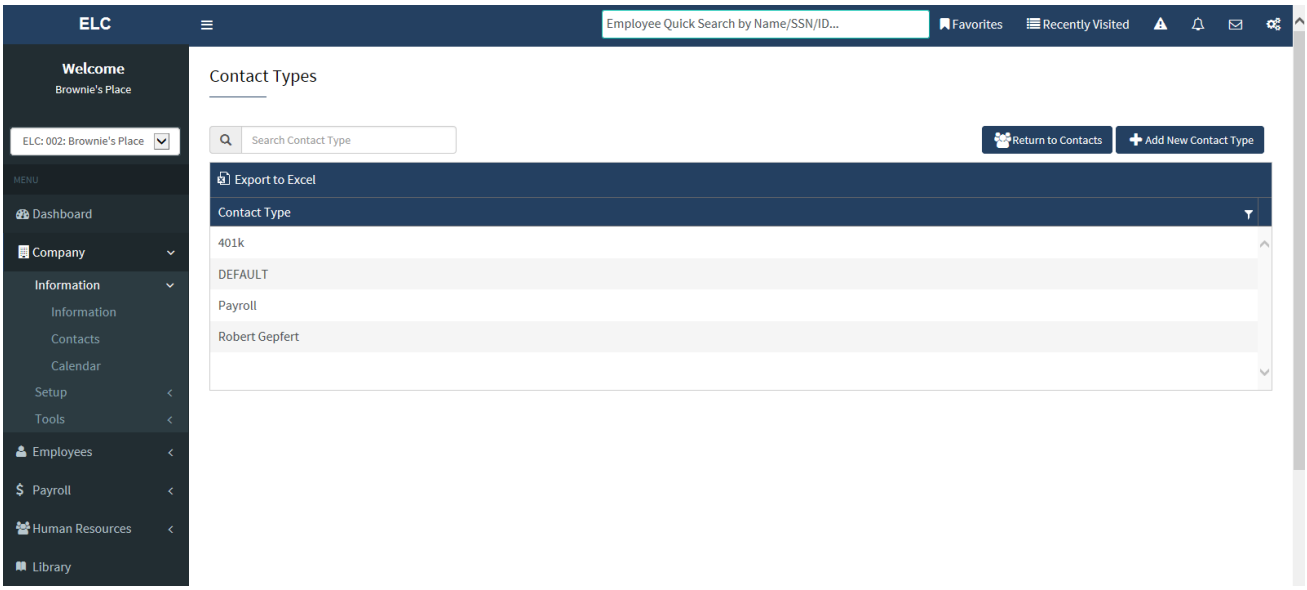
To add a new contact, click on the button. You will see a screen similar to the one below.



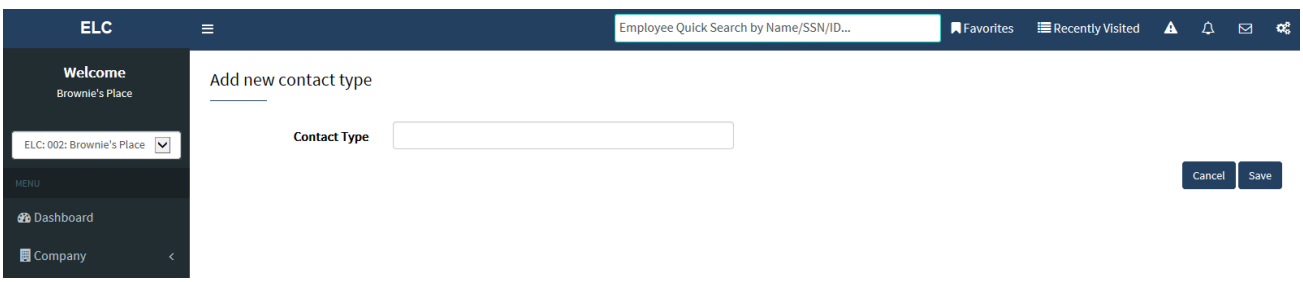
Contact Type	This indicates the contacts area of expertise (if any) – examples are payroll, benefits, or technical support.
Contact Name	Enter this individual's first and last name in this field
Phone 1 & 2	For entering primary and secondary phone numbers for this contact
Email	Contact's email address
Not An Employee	You check this box if this contact is a vendor
Employee ID	This is the DarwiNet Employee ID of this contact (if they are an employee)
Department	Select the department applicable for this person
Picture	If an employee picture is put into the system (by the system administrator), their picture will appear. If not, a standard "avatar" picture will appear

Adding a Contact Type

To create new contact types, first click the View Contact Types button. The Contact Types window will appear displaying a list of all the current contact types. To add a new contact type, click the Add New Contact Type button. The Add New Contact Type window will appear. You can then type in the contact type name and click the Save button.



Window for Add new contact type

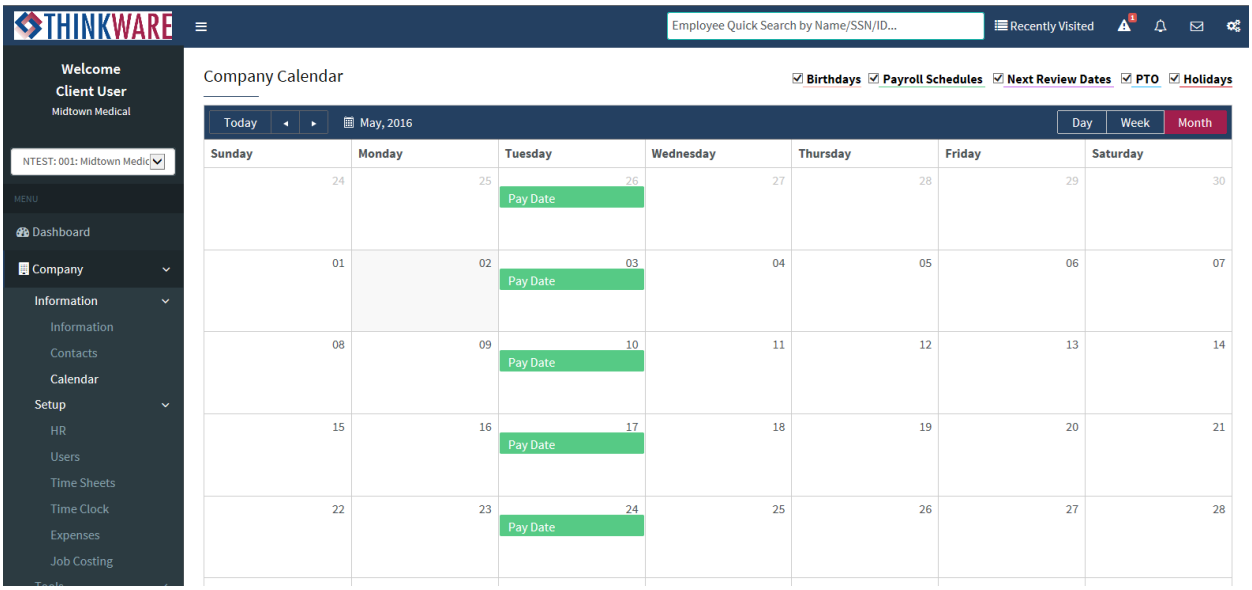


Calendar

Path: Company > Information > Calendar

The calendar view (example below) is a company calendar. It is viewable by Day, Week, and Month. Using the check box options at the top of the page you can decide which items you would like to display in the calendar.

Note: The calendar entries are created in the Setup section (see next section for more details – in Setup > Calendar).



Setup

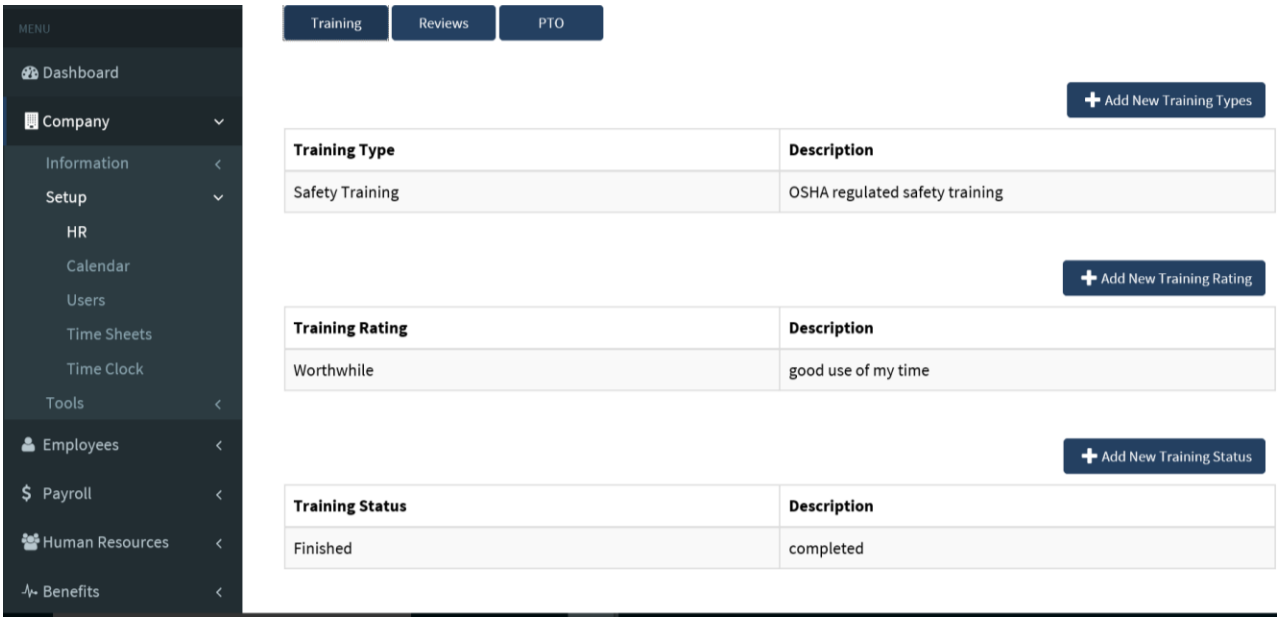
HR

Path: Company > Setup > HR

There are 3 key areas in this section for which you set up elements for your company: Training, Reviews, and PTO (Paid Time Off). In order to properly utilize the Training and Reviews functions in DarwiNet you first set up Types, Ratings, Status and Actions on these pages.

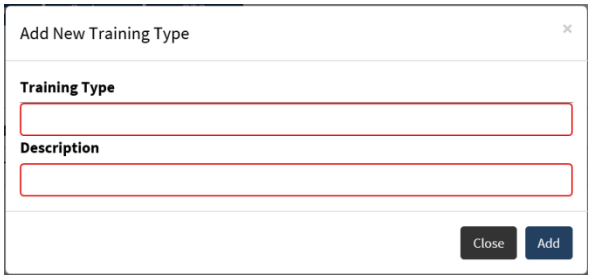
Training

Below is the screen you see in the Training section.



Training Type

The Training Type and Description of the programs is listed in the first section. To add a new Training Type, click on the **+** Add New Training Types button. After you do, you will see a screen similar to the screen below.



Enter the Training Type and Description and click the Add button to add a new training type.

Note: The Description field in these forms can take up to 30 characters. This 30 character parameter is a function of the field in Darwin software.

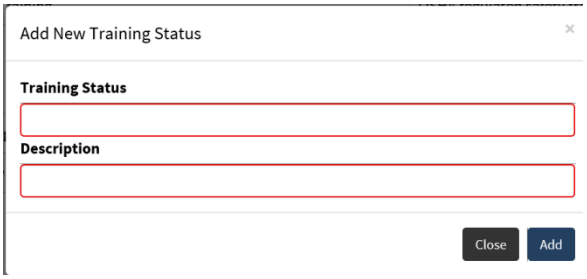
Training Rating

The Training Rating and the associated Description is listed in the second section. To add a new Training Rating, click on the **+** Add New Rating Types button. After you do, you will see a screen similar to the screen below.

Enter the Training Rating and Description and click the Add button to add a new training rating.

Training Status

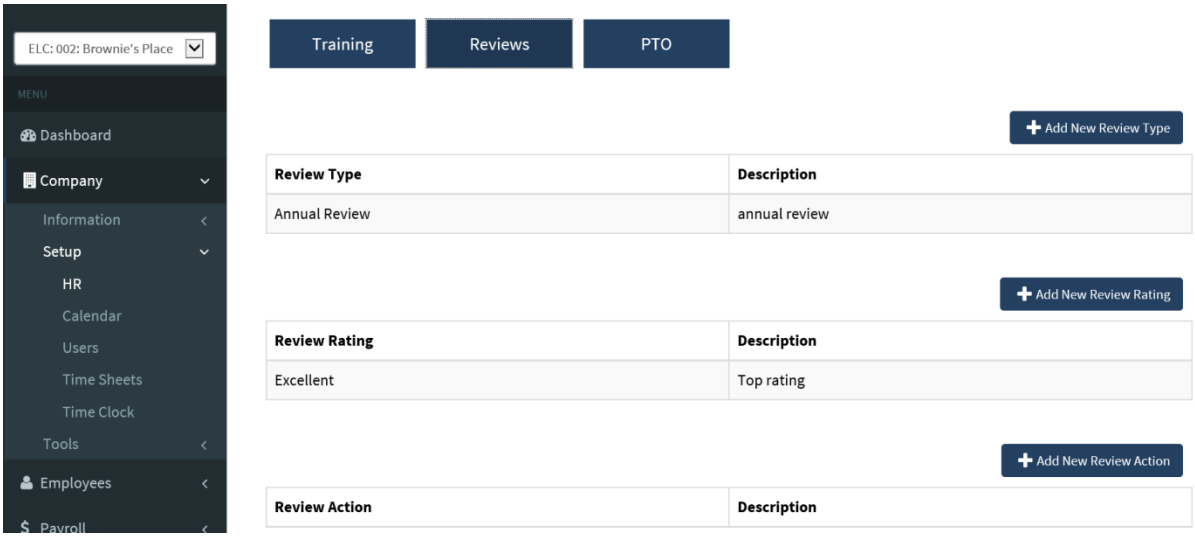
The Training Status and Description is listed in the third section. To add a new Training Status, click on the + Add New Training Status button. After you do, you will see a screen similar to the screen below.



Enter the Training Status and Description and click the Add button to add a new training rating.

Reviews

Below is the screen you see in the Review section.



Review Type

The Review Type and Description of the programs is listed in the first section. To add a New Review Type, click on the + Add New Review Types button. The screen you will see is similar to the one used for adding training elements explained in that section of this documentation (above).

Review Rating

The Review Rating and Description of the programs is listed in the second section. To add a New Review Rating, click on the + Add New Review Rating button. The screen is similar to the one used for adding training elements explained in that section of this documentation (above).

Review Action

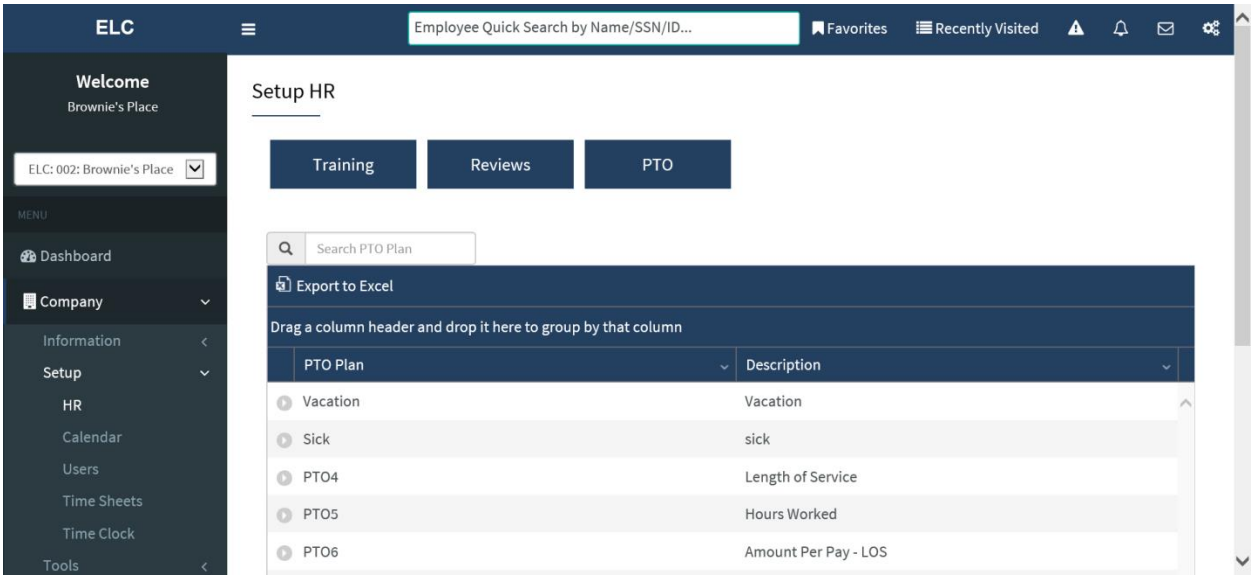
The Review Action and Description of the programs is listed in the third section. To add a New Review Action, click on the + Add New Review Action button. The screen is similar to the one used for adding training elements explained in that section of this documentation (above).

Paid Time Off (PTO)

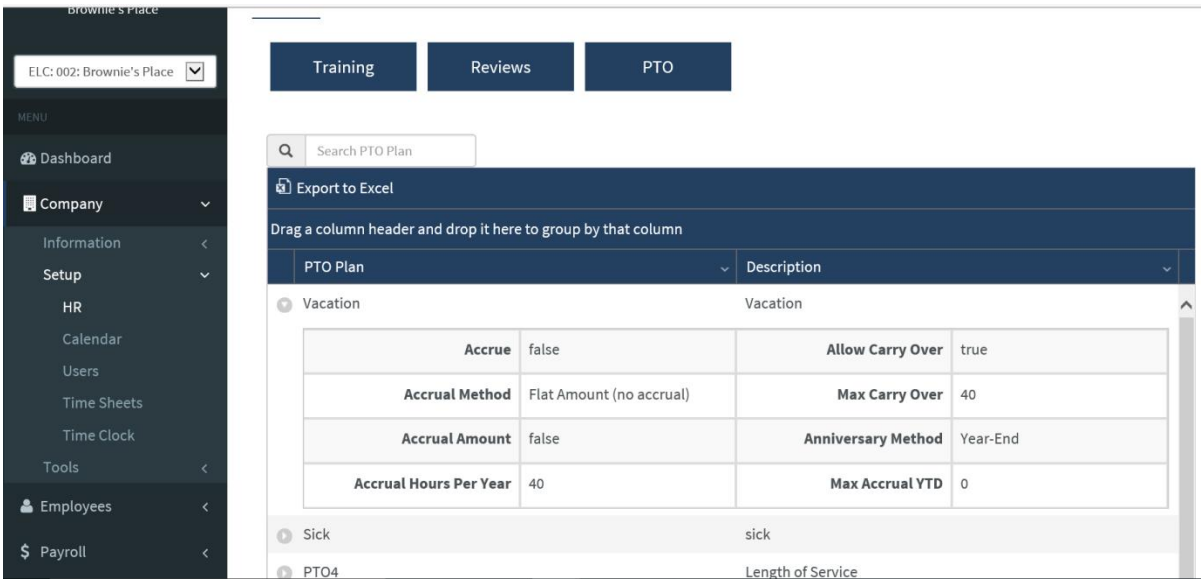
Below is the screen you see in the PTO section.

The purpose of this page is to display all the PTO plans that are currently available to this client.

Note: The PTO Plan information in the PTO screen must be setup in Darwin and imported in DarwiNet. PTO plans cannot be added or edited in DarwiNet.



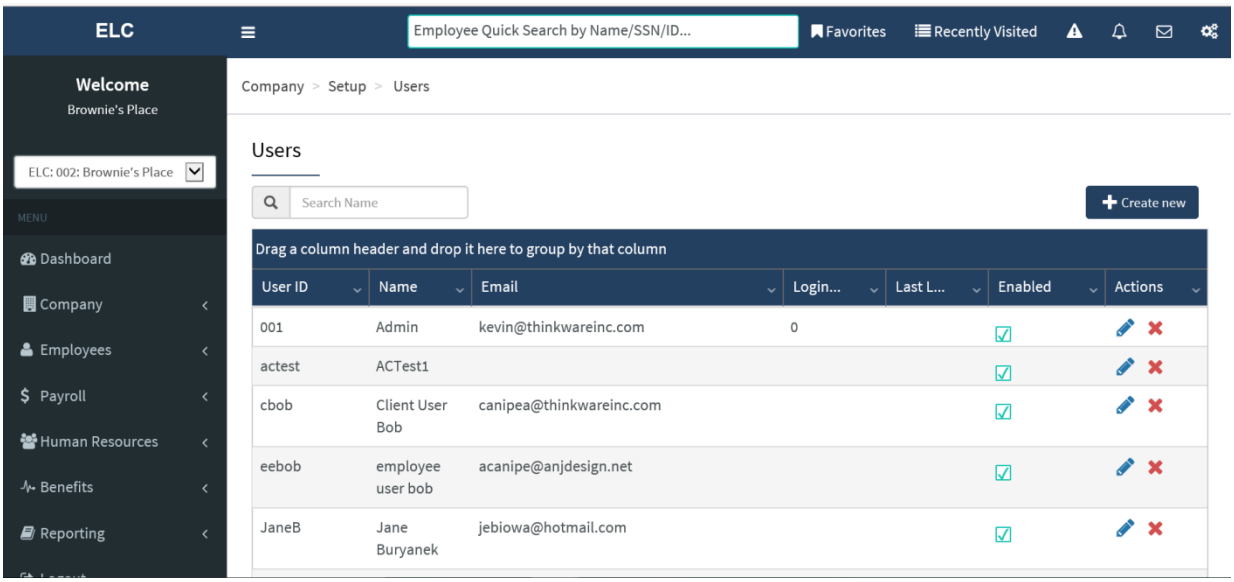
When you click on the arrow button next to one of the PTO plans (e.g. vacation) the screen will expand and look similar to the screen below.



Users

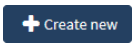
Path: Company > Setup > Users

In this menu, you may have the ability to view, add and modify user information. What you can add or modify depends on the type of access you were granted by the system administrator. Below is a sample of the first screen in this section.

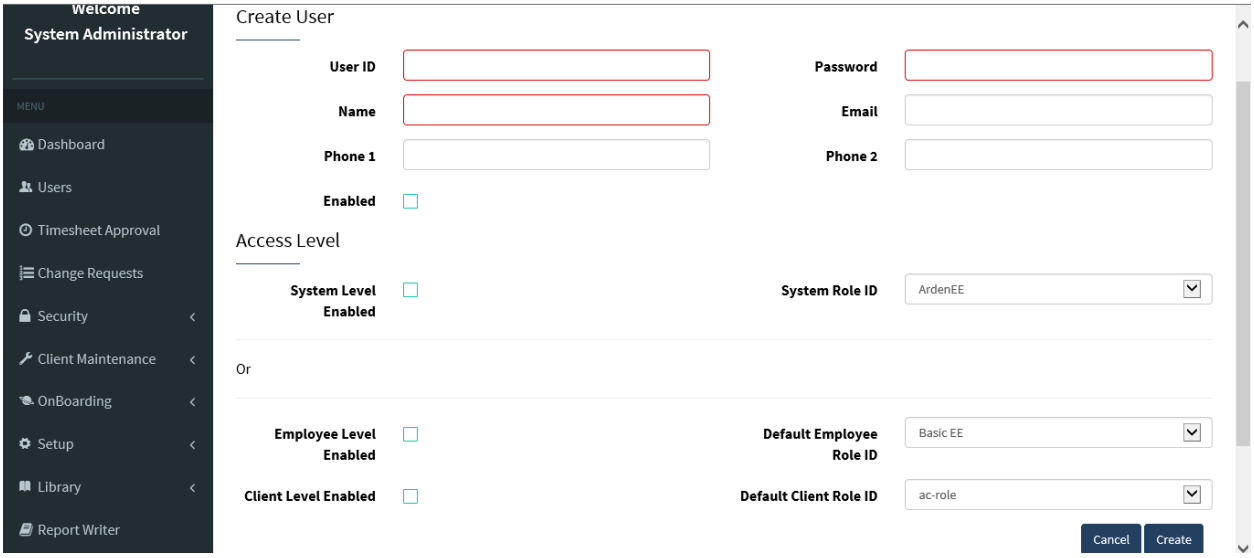


User ID	The User ID can be any combination of characters with a maximum length of 20. It can be the same as your employee number / ID in Darwin and DarwiNet. It cannot be your social security number.
Name	This field can be the user's name or any other designation you wish to use.
Email	User's email address
Login Count	Number of times this user has logged in
Last Login	Date and time of user's last login
Enabled	Notes that this user is able (enabled) to get into the application (or unable to get in – the box would not have a check in it if the user access is not enabled)
Actions: Edit	Click on this pencil icon to edit a user.
Actions: Delete	Clicking on the **X** will delete this user.

Creating a New User Login

To create a new, user click on the 

icon in the upper right corner of the screen. If you have not been granted Add access this icon will not appear on the screen.



User ID	The User ID can be any combination of characters with a maximum length of 20
Password	Passwords must be a minimum of 8 characters and a maximum of 15
Name	Enter the individuals first and last name here
Email	Add the user's email address
Phone 1 & 2	Provides 2 to allow an alternative number (e.g. cell phone as an alternative number)
Enabled	If not checked, the user will not have access to the system
Access Level:	Determines if user will have access to Client Level, Employee Level, or both. Check the enabled box next to level to which you want to give the user access.
Role ID:	These are the access roles available to you that can be assigned to the user. The roles determine the level of access the user will have and are defined by your DarwiNet System Administrator.

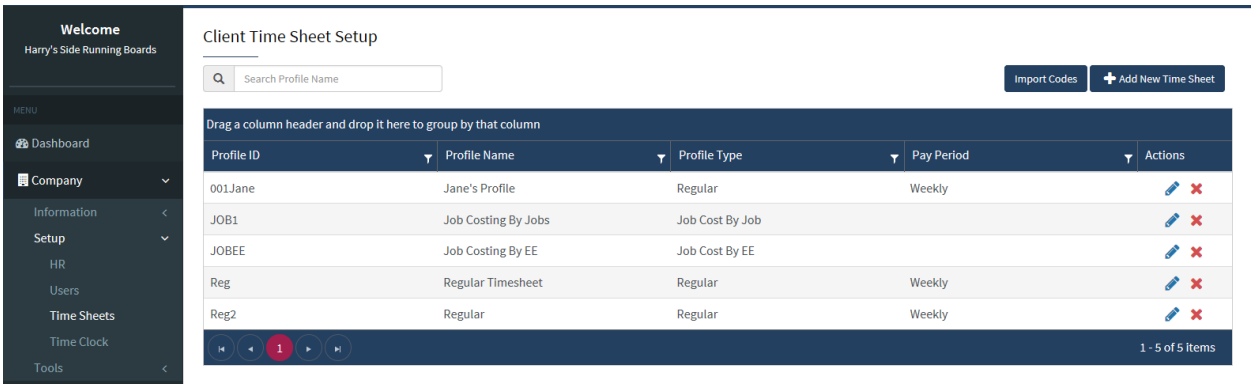
Note: In using DNet, you will need to create new users. The users set up in DarwiNet and the users set up Darwin do not transfer to DNet

Time Sheets

Path: Company > Setup > Time Sheets

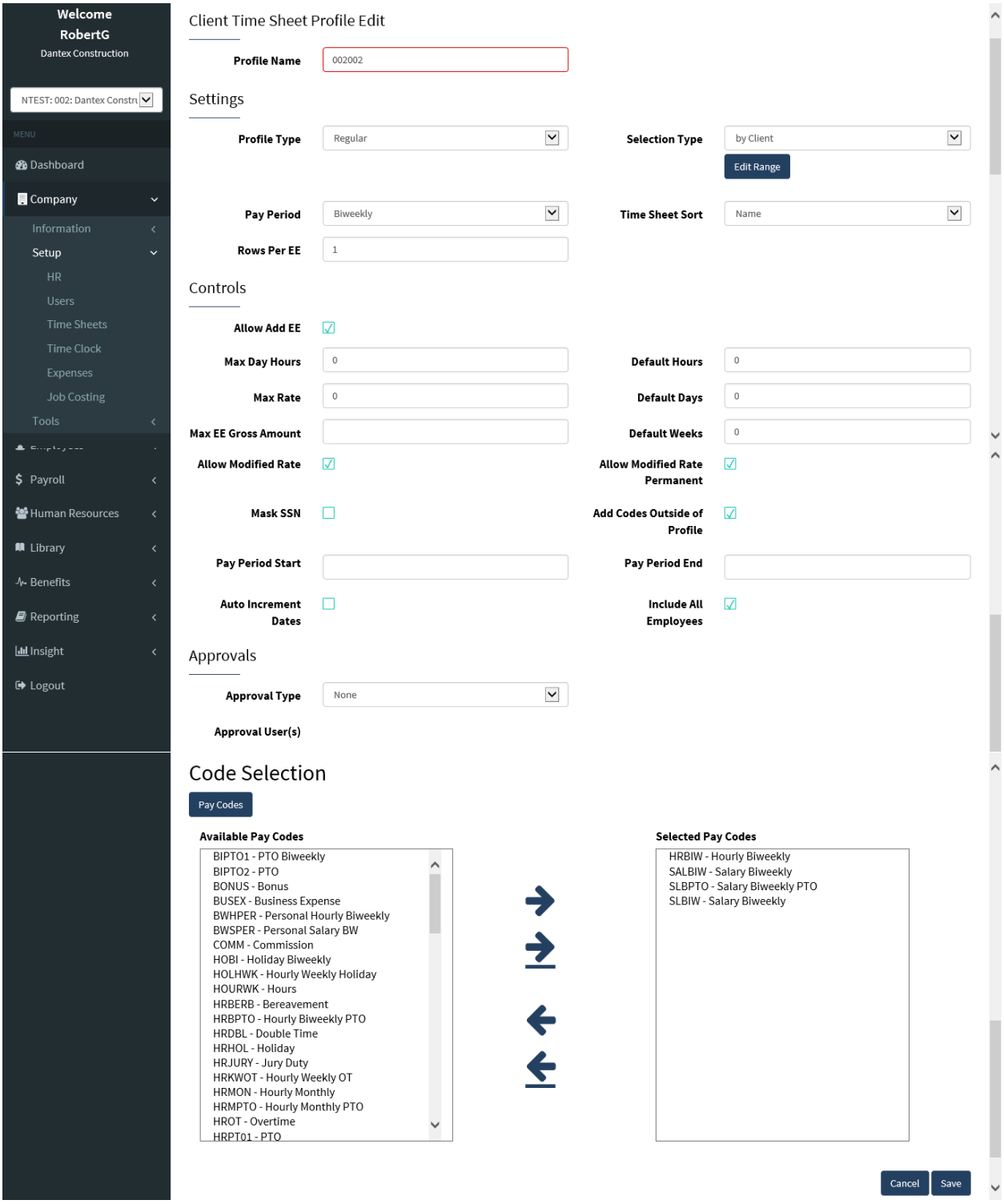
New in DarwiNet 2.0 is the ability to create and edit RDE time sheet profiles. RDE profiles are added by the System Administrator and assigned to the client. A Client User cannot create a RDE Profile. Once they are assigned, RDE profiles can be edited in this screen. You also have the ability to add new time sheets from this menu.

Note: In this menu, you can also create Translation Codes for time sheet imports from third party time clock vendors.



Editing an RDE Time Sheet profile

To edit an RDE Time Sheet Profile click on the icon in the Actions column to the right of the Profile ID. The screen below will then appear.



Settings:

Profile Name	This is the name the system administrator gave to the profile when it was created. You have the ability to edit this name.
Profile Type	Select the appropriate type: regular payroll, Job Costing – by job, or Job Costing – by employee
Selection Type	This setting determines how employees will be selected for the time sheet. For example "by Client" would select all employees that are active for the client. The "by Department" selection will allow you to restrict employees to certain departments. After you select the Type then click the Edit Range button to select who will appear in the time sheet.
Pay Period	Select the appropriate time frame for this type of payroll
Time Sheet Sort	This selection determines how the employees are sorted in the time sheet.
Rows per EE	Select the default number of rows in the time sheet for each employee. For instance if you know you will need to add a row to each employee to account for a different pay rate in the same pay code.

Controls:

Allow Add EE	Checking this box allows employees to be added to the time sheet after it is created.
Max Day Hours	This setting will set a maximum number of hours that can be entered for each employee. Leaving the setting at zero is the default and removes any cap from the setting.
Default Hours	The default number of regular hours in a work week.
Max Rate	This is the Maximum rate that can be assigned to a pay code.
Default Days	This is the default number of day in a work week.
Max EE Gross Amt	The Maximum gross pay that an employee can earn in a pay period.
Default Weeks	This is the number of weeks in the time sheet by default.
Allowed Modified Rate	If this box is checked pay rates can be modified on the time sheet.
Allowed Modified Rate Permanent	If checked this will allow the user to permanently change the rate on a pay code for an employee on the timesheet, not just for the current timesheet.
Mark SSN	This setting obscures the SSN with asterisks.
Add Codes Outside of Profile	If checked allows the addition of pay codes after the time sheet is created.
Include All Employees	If the box for this field is checked, this time sheet profile will pull all employees for the timesheet regardless of the pay code assignment if not filtered by pay code

Approvals:

A new feature in Dnet 2.0 is time sheet work flow approvals. This will allow for approval by multiple users before the time sheet can be released to the PEO for processing.

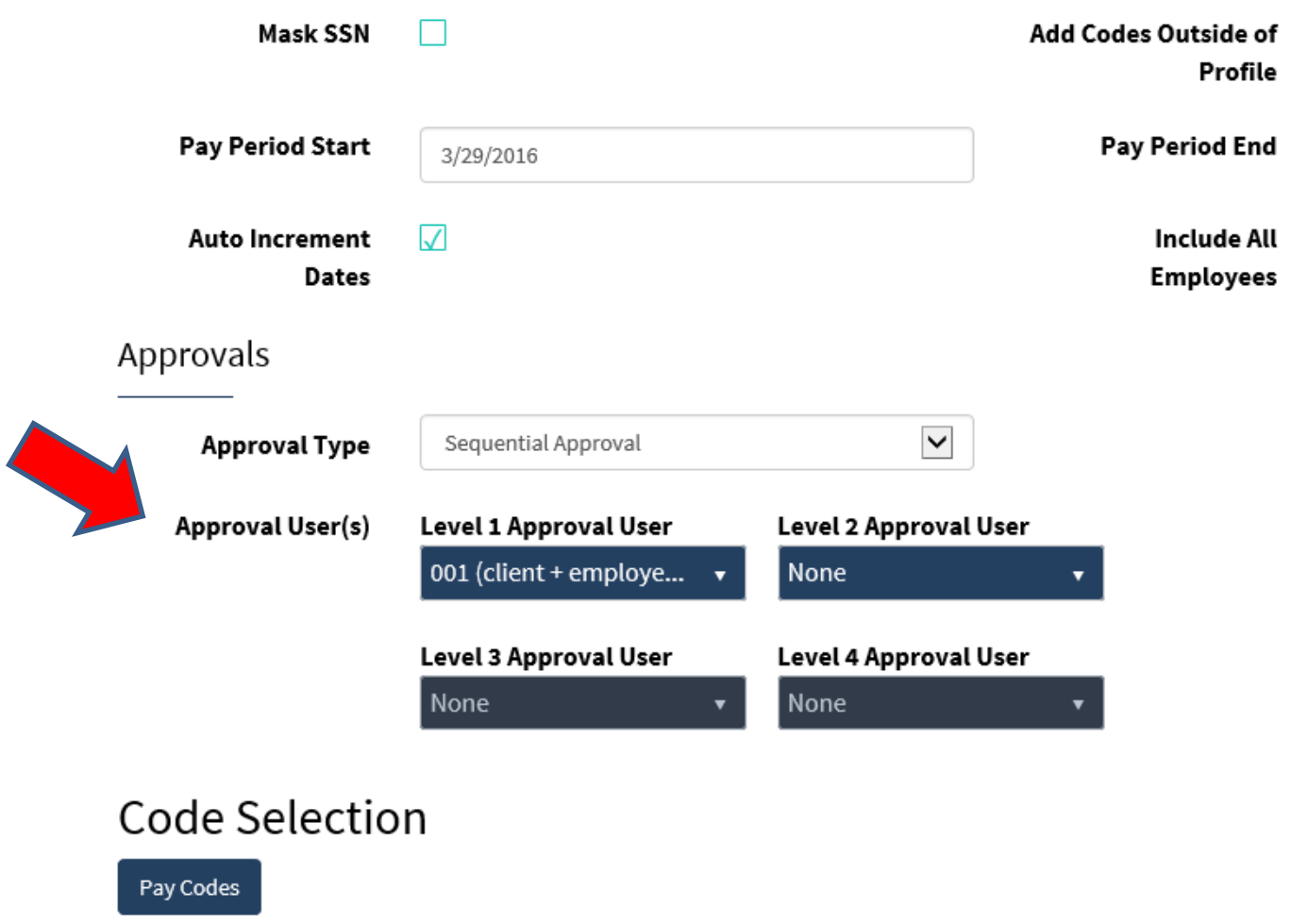
Approval Type There are 3 approval types

None: When this type is selected the timesheet will be released directly to the PEO for processing.

Sequential: This is used to require the time sheet be approved by 2 or more users in a sequential order before it can be released to the PEO.

Parallel: Two or more users must approve the time sheet, but the approval can be in any order and the time sheet is released when the last user to approve completes the process. All users have to approve the request.

Approval Users Select the users that will be approvers of the timesheet and at which level of approval process you wish them to approve the time sheet. See example below:



Code Selection:

This function allows you to select the Pay Codes, Benefit Codes, and Deduction Codes that will be available on the time sheet.

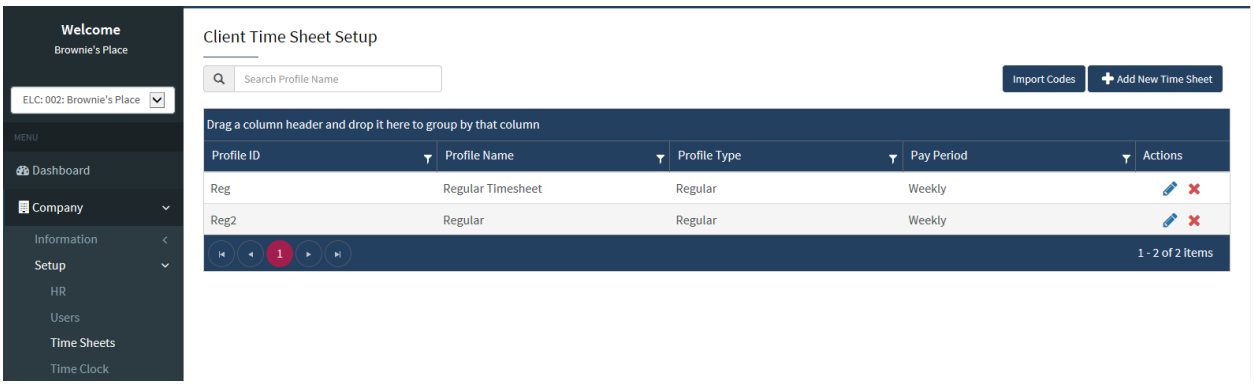
Code Selection:

Pay Codes	From the Available Pay Codes (box on left – see sample below) elect which Selected Pay Codes will be available by clicking the → arrow to move an available pay code to the selected pay codes available. You can move all of them by choosing the ⇒ arrow.
Benefits Codes	Use the same methodology as explained in the Pay Codes paragraph above to select Benefits Codes that will be available.
Deduction Codes	Use the same methodology as explained in the Pay Codes paragraph above to select Benefits Codes that will be available.
Cancel	Click the cancel button should you not wish to save your changes
Save	Click the save button to save your changes

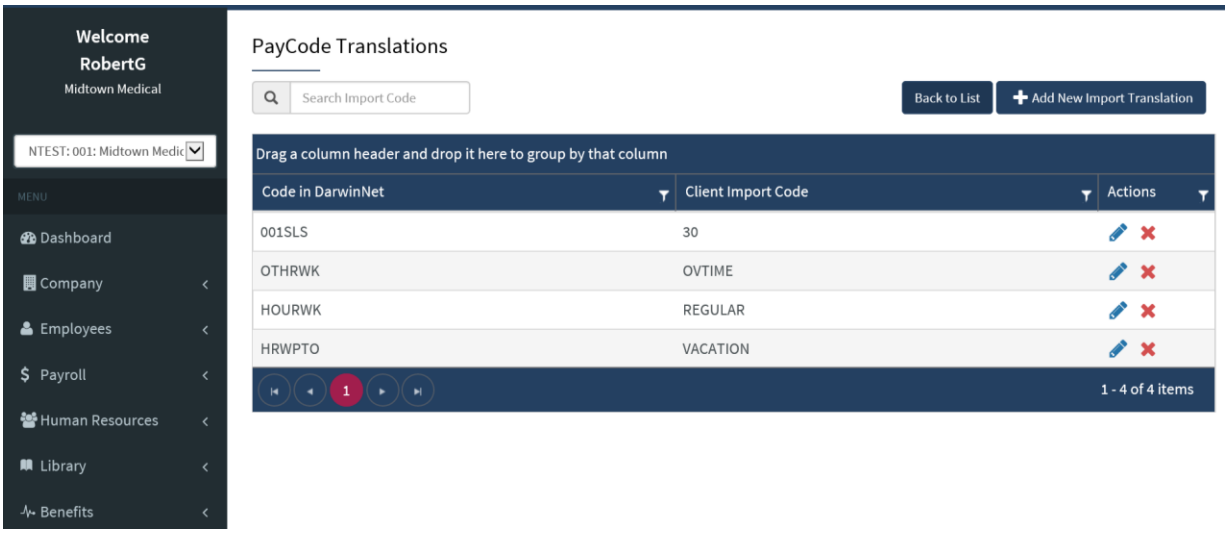
Reminder: You can add or remove one at a time, a group (using Ctlr and Shift to select several), or all at one time using the → or the ← buttons.

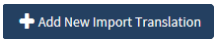
Creating Import Codes

The purpose of the Import Codes function (click on the Import Codes button on the top navigator) is to translate pay codes and department codes from third party time clock imports. If pay codes in the third party import don't match the codes in DarwiNet, translations can be setup to tell DarwiNet how to apply these codes.



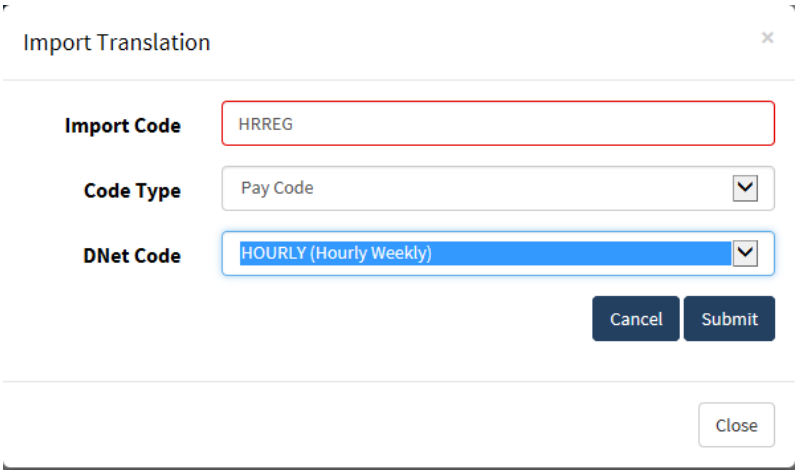
To setup a translation click the Import Codes button in the Client Time Sheet Setup screen. The Pay Code Translations screen will appear (see example below).



You will then click the 

button to begin the process and the Import Translation pop up window will appear (see below).

Note: You will see the DNet Code field after you select a Code Type



Import Code — In this box you will type the code as it will appear in the time clock import file that is exported from the time clock system.

Code Type — In this dropdown you will select the type of code that is being imported.

Dnet Code — Select the code in your RDE time sheet profile that this code will be matched to.

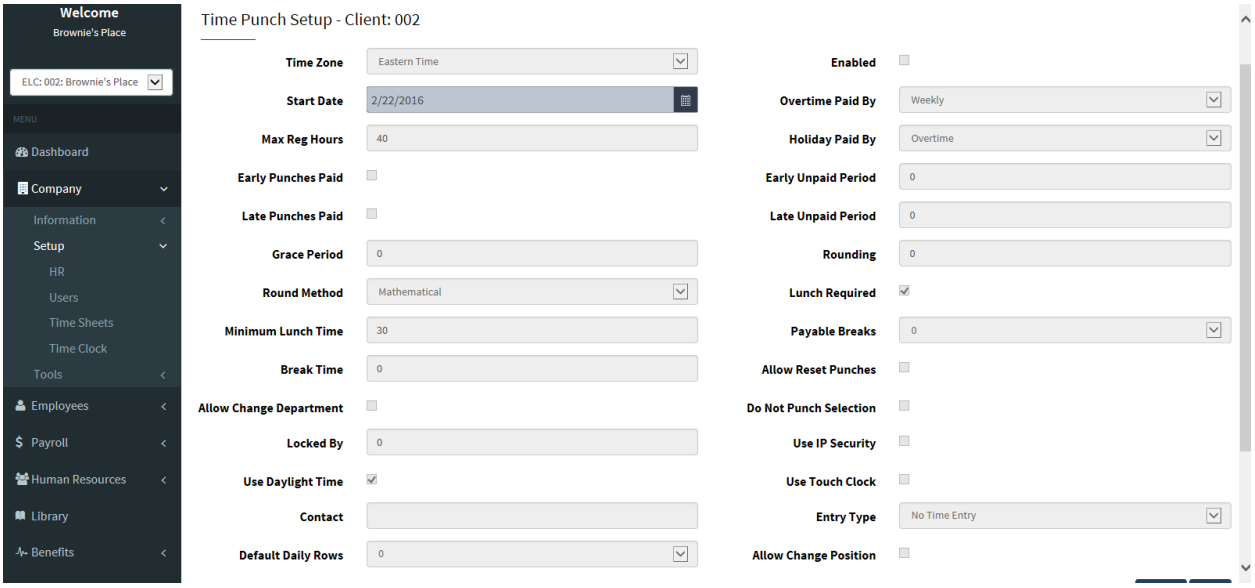
Note: For additional information on importing time sheets see Payroll > Payroll > Time Entry > Add New Timesheet

Time Clock

Path: Company > Setup > Time Clock

In this Menu, you will have the ability to configure your Time Clock settings that will determine how time clock works for your employees.

Note: There is also setup that needs to be completed to make Time Clock active for each employee. You will need to enable **Allow EE Time Clock** ☑. See details in the Company > Setup > User section of this documentation.



Time Zone	Defines the time zone where the client resides. For employee time punches, the punched time is obtained from the National Clock located in Kansas City, Missouri (Central Time Zone).
Enabled	This designates if the online time clock function is available for the associated client. If marked, time clock information and functions are available for the client and employee levels.
Start Date	A required field that indicates the date on which the client will begin using the online time clock.
OverTime Paid By	Use to indicate the manner in which DarwiNet should calculate overtime, if at all. Choose No Overtime Pay for all hours to calculate at the regular, hourly rate. Choose Daily for overtime to calculate once an employee works in one day more than the designated hours. Choose Weekly for overtime to calculate once an employee works in one week more than the designated hours.
Max Reg Hours	This is the maximum number of regular hours in a pay period.
Holiday Paid By	Indicate the manner in which holiday hours are to be treated on the timesheet. Choose *Regular* to have holiday hours assigned to a regular type pay code and paid at straight time rate. Choose *Overtime* to have holiday hours assigned to an overtime type pay code and paid at the overtime rate. Choose *Double Time* to have holiday hours assigned to a double time type pay code and paid at double time rate.

Early Punches Paid — This function is designed to help control employee overtime. This setting determines, based on the start time defined by the work schedule, if early punches are recognized. If marked, punches prior to the work schedule start time will be allowed and calculated hours worked will begin based on the actual time punched. If unmarked, punches prior to the standard start time can be made, but paid time is calculated based on the client's start time - defined by the work schedule as opposed to the actual time punched.

Early Unpaid Period — This feature is designed to cut down on extra hours accumulated by employees clocking in a few minutes early each day. This entry is expressed in minutes and will reset an employee's punch time to the start time listed in the Client Work Schedule if the employee clocks in within the early unpaid time period. For example, consider an employee that has a regular start time of 8 am and they clock in at 7:50 am. If the Early Unpaid period is set to 15 minutes, the employee's punch will be set to 8am. However, if the employee clocks in at 7:44 am or earlier the punch will remain for that time.

Late Punches Paid — Designed to help control employee overtime, this setting determines, based on the end time defined by the work schedule, if late punches are recognized. If marked, punches after the standard end time will be allowed and calculated hours worked will be based on the actual time punched. If unmarked, punches after the standard end time are not paid and calculated hours worked will be based on the end time defined by the work schedule as opposed to the actual time punched.

Late Unpaid Period — This feature is designed to cut down on extra hours accumulated by employees clocking out a few minutes late each day. This entry is expressed in minutes and will reset an employee's punch time to the end time listed in the Client Work Schedule if the employee clocks out within the late unpaid time period. For example, use an employee who has a regular end time of 5pm and they clock out at 5:10pm. If the Late Unpaid period is set to 15 minutes, the employee's punch will be set to 5pm. However, if the employee clocks out at 5:16pm or later, the punch will remain for that time.

Grace Period — Expressed in *minutes*, this setting defines a grace period for employee punches. The grace period identified here will provide a window of time after the standard start time and before the standard end time when employee punches will be rounded to the standard time. For example, if the grace period is set to 5 minutes and the client work day is defined as 9:00 a.m. to 5:00 p.m., employee punches between 9:00:01 a.m. and 9:04:59 a.m. will be rounded to 9:00:00 a.m. Similarly, end of day punches between 4:55:01 and 4:59:59 will be rounded to 5:00:00 p.m. You may choose a five minute increment ranging from None (no rounding) to 55 minutes. The recommended setting is 5 minutes.

Rounding — Expressed in *minutes*, this setting defines how an employee's punched time will be rounded when calculating worked time. Select No Rounding if you want the

worked time to be paid to the nearest second. Making a numeric selection means that the employee's punched time will be calculated to the selected value. If a Grace Period is indicated the system still rounds from the actual employee punch. For example, a punch at 9:09 AM with the Grace Period set to 10 minutes, and a rounding system of 5 minutes, will round to 9:00 AM. Indicating a rounding value of 15 minutes means that the employee's actual punched time will be rounded to the nearest quarter-hour. You may choose from: No Rounding, as well as minutes of 1, 5, 10, 15, 30, 45, or 60. The recommended setting is 5 minutes.

Round Method — There are two methods of rounding from which to choose. One is based on Mathematical rounding, the other method (called EE 'Friendly') will round to maximize the employee's time. Please note that, if there is a designated Grace Period, rounding will not apply to any punches that fall within the designated grace period.

- When *Mathematical* is selected, rounding will be based on standard mathematical rounding. For a specified rounding of 5 minutes a time punch of 8:15:01 to 8:17:29 would roll back to 8:15:00 and a time punch of 8:17:30 to 8:19:59 would round to 8:20:00.
- When *EE 'Friendly'* is selected, all rounding will be to the benefit of the employee's maximum work hours.

Lunch Required — This checkbox helps determine the daily number of punches expected for each employee. If marked, DarwiNet will anticipate a minimum of four employee punches per day (In for Day, Out to Lunch, Return from Lunch, Out for Day). If unmarked, then only the "In For Work" and "Out For Day" punches will be expected; only these punch types can be calculated as *missed* when the system determines if punches for a day are complete.

Minimum Lunch Time — This setting defines the minimum amount of lunch time that will be used when calculating an employee's hours worked - based on their actual punches. If an employee's lunch time exceeds the minimum duration, the actual punched time will be used. If the lunch time is less than the minimum duration the minimum time will be used when pay is calculated (the employee will be able to punch *Return from Lunch* prior to the set minimum time). For example, if the minimum is set to 45 minutes and the employee punches out at noon and back in at 12:40:00, the return time will be recorded as 12:45:00. However, if the employee punches out at noon and back in at 1:00:00, the return time will be recorded as 1:00:00. The available choices are No Minimum, or minute increments of 15, 30, 45, or 60.

Payable Breaks — If *Number of Payable Breaks* is set above *0* is marked, this feature allows the employer to limit the amount of time an employee is paid for a particular break. The employee will be able to punch *IN FOR WORK* at any time, but will not be paid for time beyond this setting. Choose up to 20 minutes, and this excludes the lunch break time, which is controlled under *Minimum Lunch Time*. Also, if

	an employee does not take the allotted number of paid breaks but exceeds the lunch time limit, then the "unused" paid break time will reduce the excessive lunch time.
Break Time	This is the number of minutes that will be paid for a break.
Allow Reset Punches	If marked, a button will display in the employee's clock window that will allow them to reset their most recent punch. If unmarked, the reset button will not display and this action is unavailable.
Allow Change Dept.	When checked, this setting will allow employees to punch out of one department and punch in to another. This allows for tracking time and pay when an employee works in different departments throughout a day. The time entries each department will show on separate lines in the time sheet so that pay rate can be adjusted if necessary.
Locked By	This setting determines the number of minutes the employee will be locked out from punching again after their initial punch.
Use IP Security	This setting provides a safety mechanism by prohibiting employees from initiating punches from any random computer/internet location. If marked, an IP Address range must be entered by the client administrator and employee punches will only be accepted if made from a computer with an IP Address in the specified range. An employee level override allows for combinations of general client IP security and employee IP security. You may enter multiple IP address ranges.
Use Daylight Time	Select this checkbox option if the client is located in an area that recognizes daylight savings. This option is necessary to ensure the displayed time for employee time punches is accurate.
Use Touch Clock	The TouchClock System is a standalone kiosk monitor than can be used to record punches. An employee uses the TouchClock to enter their secure ID. Once done, they can view their existing punches as well as punch in or out for work, breaks (if permitted), or lunch, and can select the corresponding department, if applicable. The TouchClock provides a convenient method for recording punches, without requiring an employee to use their computer. In order for the TouchClock System to be used, this checkbox must be marked. The touch clock application must be purchased separately.
Contact	This field contains the contact email for notifications regarding time clock. For instance if no other users are assigned to notifications for time change requests, the requests would default to the email address(es) listed here
Entry Type	This determines if the employee will be entering time by punching in and out of the clock or entering their time manually each day. This will usually be set to time punch for most users.

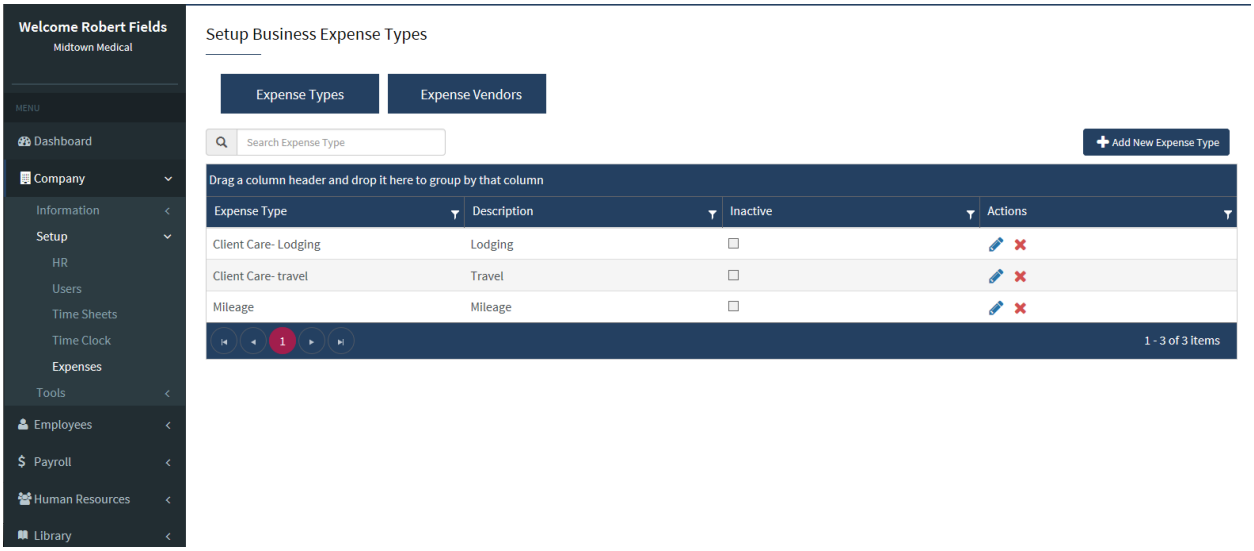
Default Daily Rows	This is the default number of rows each day for each employee if Entry Type is set to Daily Time Entry.
Allow Change Position	When checked, this setting will allow employees to punch out of one position and punch in to another. This allows for tracking time and pay when an employee works in different positions throughout a day. The time entries for each position will show on separate lines in the time sheet so that pay rate can be adjusted if necessary.

Expenses

Path: Company > Setup > Expenses

The purpose of this menu is setting up Expense types and vendors to be used in the Expense Request area under the Payroll menu. Expense types and vendors can be viewed, edited or added from this menu - depending on the client user's access.

You can toggle between viewing Expense Types and Expense Vendors by clicking the buttons at the top of the page. New types can be added by click the Add new button on the appropriate page.



When you click on the *Add New Expense Type* or the *Add New Expense Vendor* button, you will see a screen that allows you to add a new expense or vendor and describe it. Then save it. It will then appear in your list of expenses (or list of vendor expenses).

You can also edit either of these by clicking on the pencil icon. When in edit mode, you will notice you can make it inactive. When it is inactive, it will still appear on your list. It will no longer be an option for an employee to choose.

You can delete the item by clicking on the red X on the right of the item.

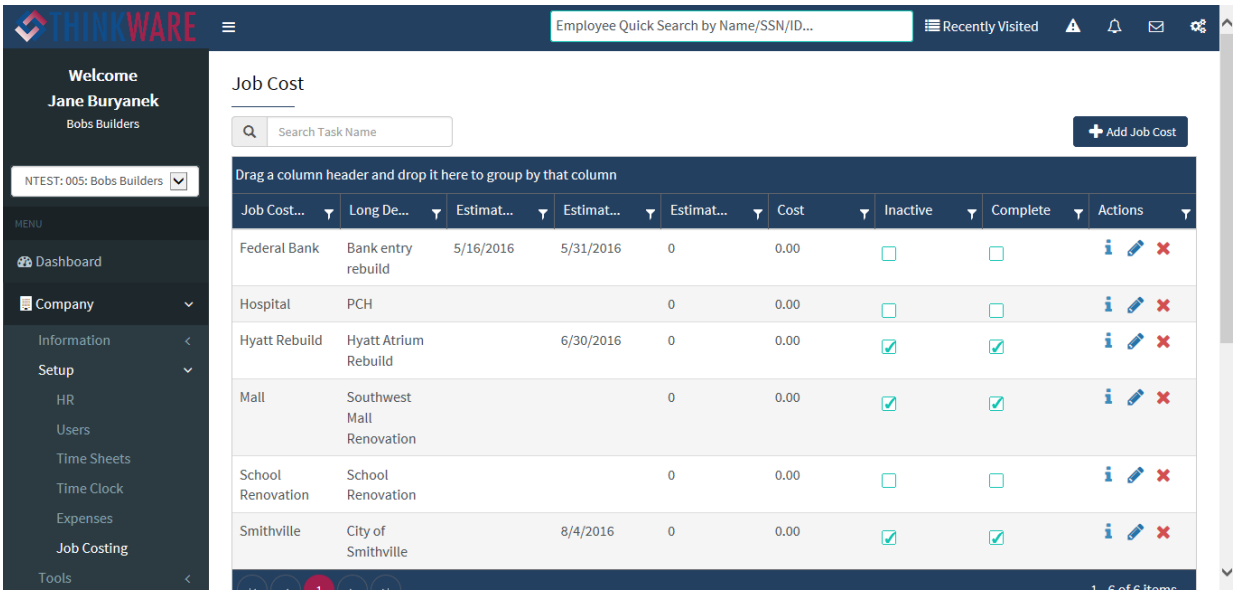
Note: If you delete a expense type or vendor, past expense forms and reports associated with that expense type or form will remain in the system.

JOB COSTING

Path: Company/Setup/Job Costing

For clients that are set up for job costing, users can enter jobs directly into DNet. These jobs, once assigned to employees, can be used in job cost timesheets.

Jobs that client currently has will appear in grid. Users can add a new job cost or update a current job.

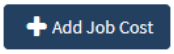


Key Items:

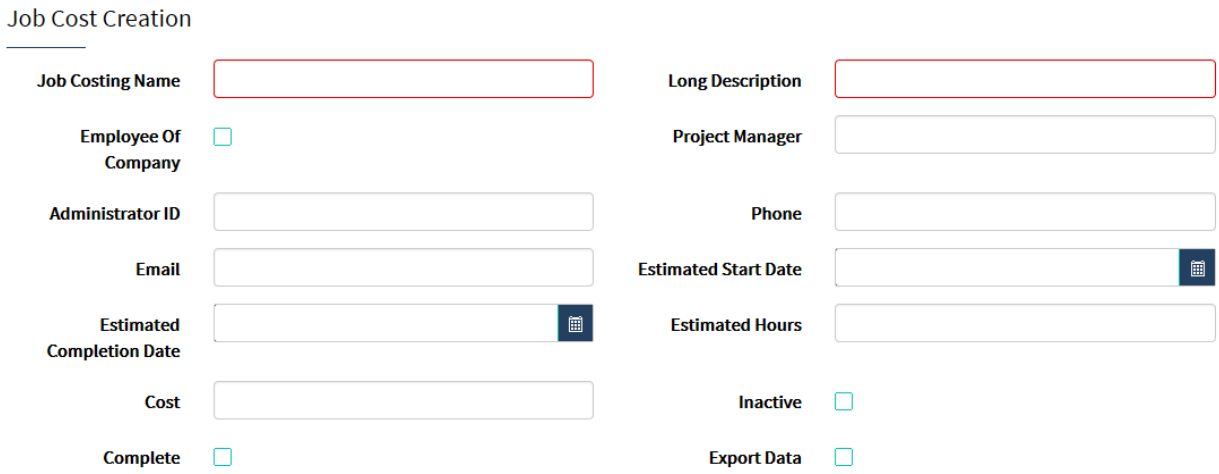
Will show job details or allow new job detail to be added to job.

Allows editing of job cost

Deletes job cost

To add a new job cost, click on 

button and you will see the first section of the screen (example below).

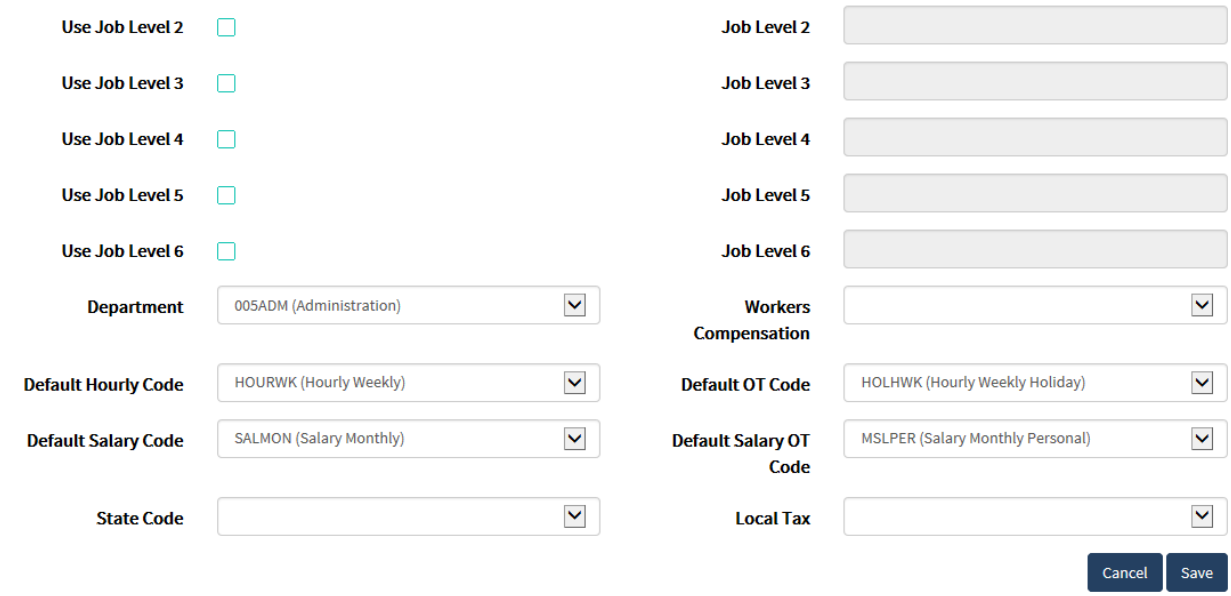


This first section of job cost allows for additional information for client for job cost.

Job Costing Name	What the user will call the job
Long Description	Description of job can be entered.
Employee of Company	Check this box if Project Manager is employee of Company. Button appears to allow selection of manager. A List of employees will be available to select a manager.
Project Manager:	Name will populate if selected from employee of company. If not, manager can be entered.
Administrator ID:	ID of the manager can be entered here
Phone:	Phone number for manager
Email:	Email for manager
Estimated Start Date:	Start of job
Estimated End Date:	End of job
Estimated Hours:	Hours for job
Cost:	Cost of job
Inactive:	Inactivate job
Complete:	If job is complete, user can check.

Export Data: This is a field that mirrors the same field in Darwin software

Below is the second section of the *Add New Job Cost* Screen. This section includes the specifics for the job.



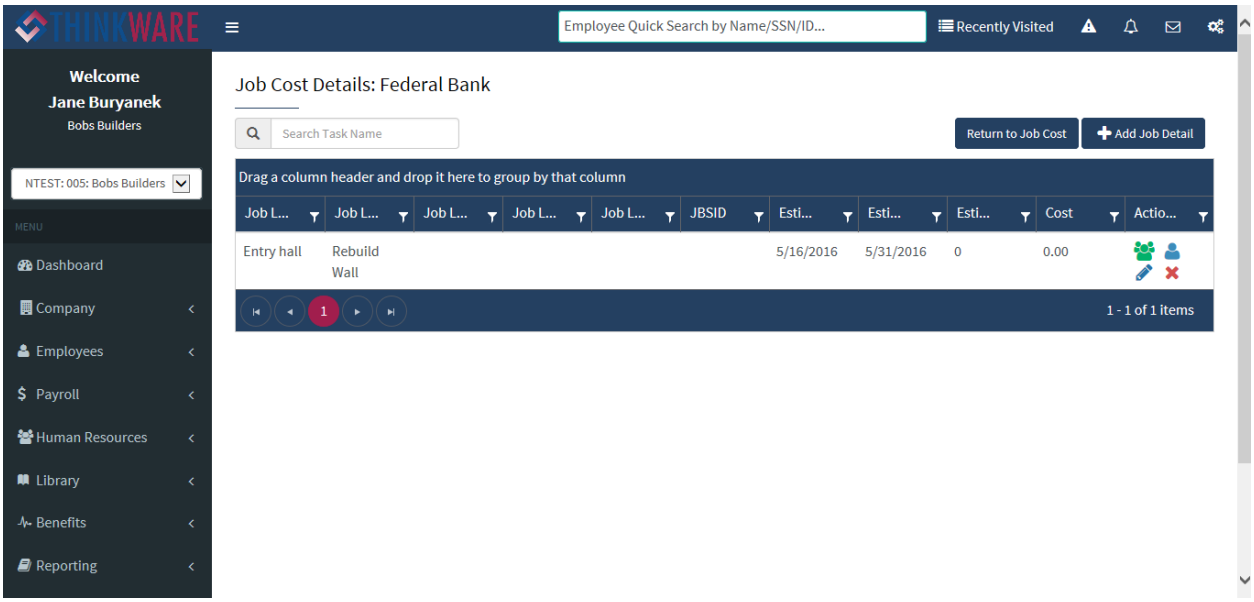
Use job level #	This is a tier for the job. For each tier, the checkbox should be used.
Job level	This is what the level will be called. Examples are tasks, phases, etc.
Department	Select the department this job will be used by
Workers Compensation	Select the WC code this job will use
Default Hourly Code	What hourly code will be the pay code for this job
Default OT Code	What default overtime code will be the pay code for this job
Default Salary Code	What salary code will be the pay code for this job
Default Salary OT Code	What default salary overtime code will be pay code for this job.
State Code	What is the state code for the job
Local Tax	If any local taxes, what is the local tax for the job

Click save

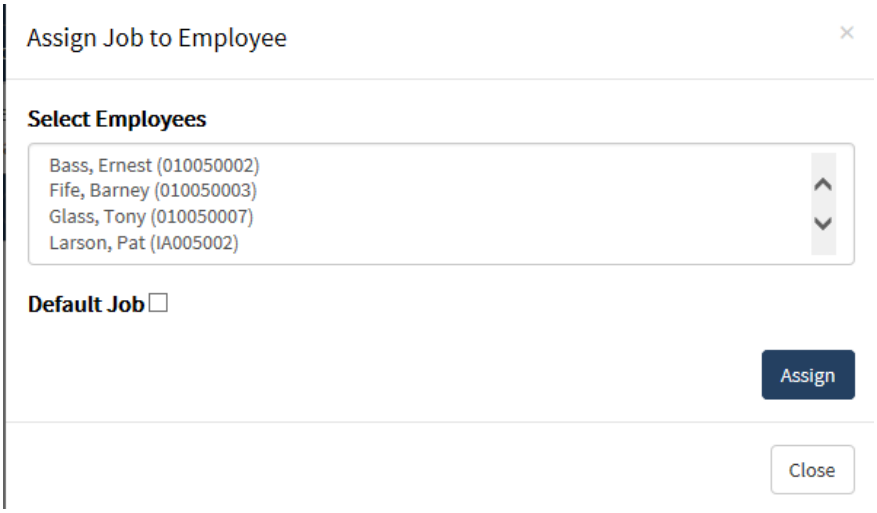
after you have entered your information in this form.

Job details

After clicking on the detail button (on the main screen) the grid will show various job details for the job. On this screen, users can assign to employees, manage employees, and edit/delete. See additional explanations below of these four functions.

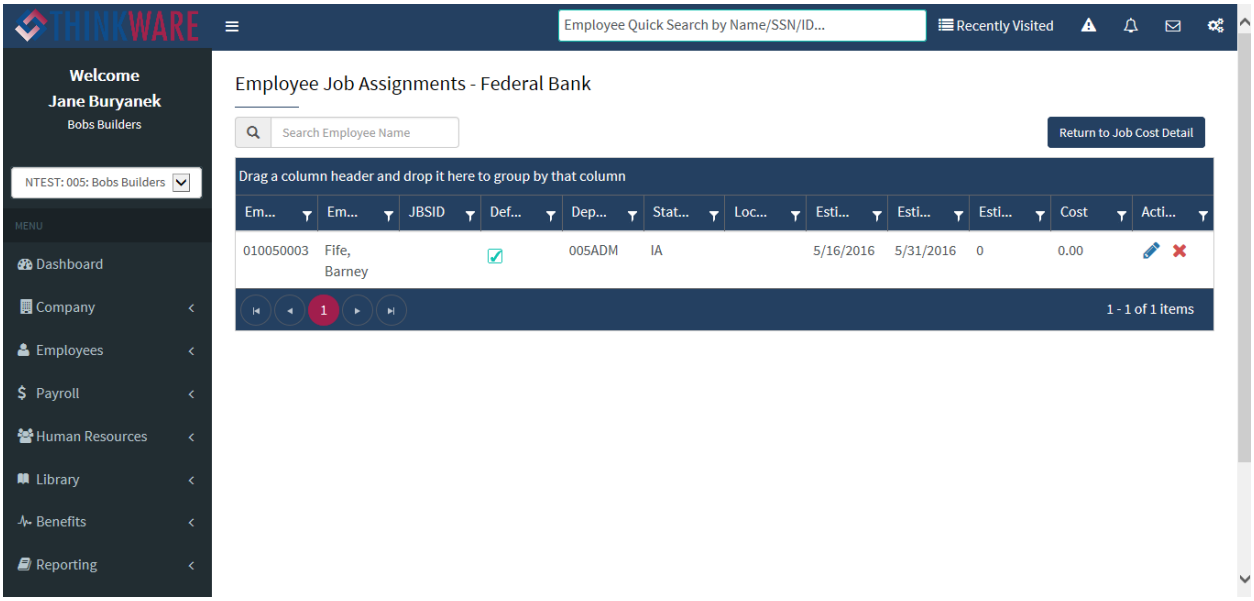


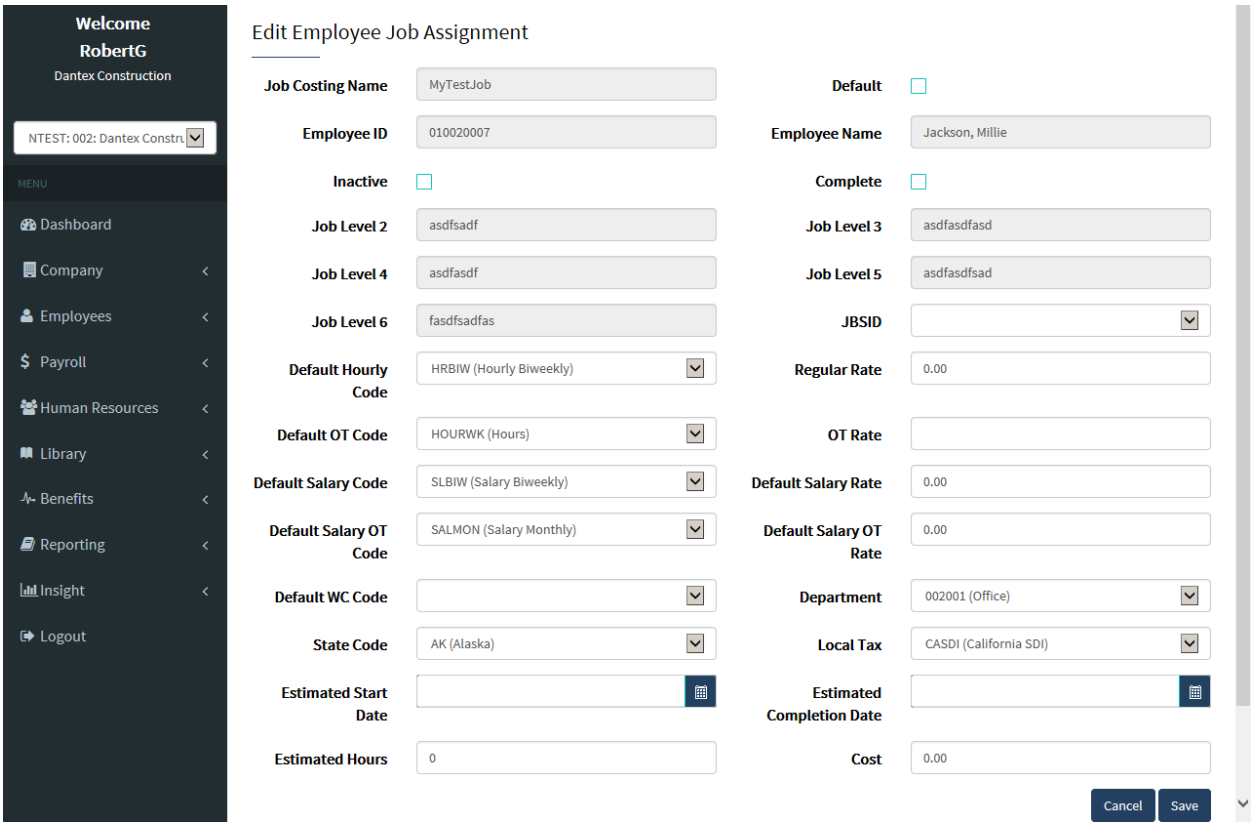
Assign - Employees can be assigned. If the job is the employee's default job, mark the default job checkbox.



Manage employees - Employees that are assigned to the job can be edited. After you click on the *Managed Assigned Employees* icon, you will see the screen below. Specifics for the employee can be edited here. Click on the edit button on this screen to edit the

information for the employee. You will see the *Edit Employee Job Assignment* form (see example below).





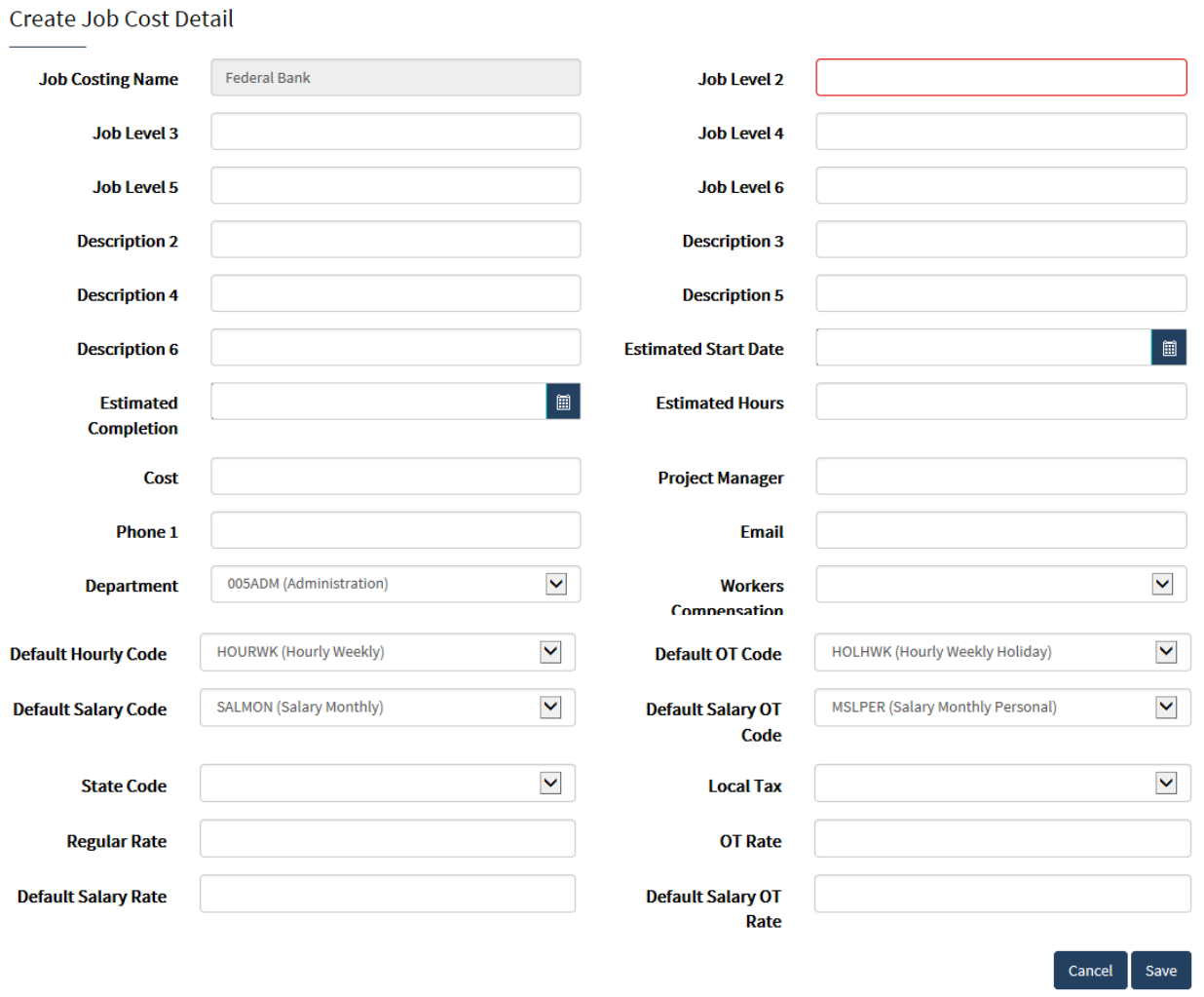
Other icons on the *Job Cost Details* screen (path: Company > Setup > Job Costing >)

Edit the job details

Delete the job details.

Add job detail

On the *Job Cost Details* screen (path: Company > Setup > Job Costing >), click on the Add Job Detail button to add new details. You will see the form below.



Enter specific details for the level of the job on this form. Any specifics entered in this job cost details form will pertain only to the job cost to which the details are associated.

Tools

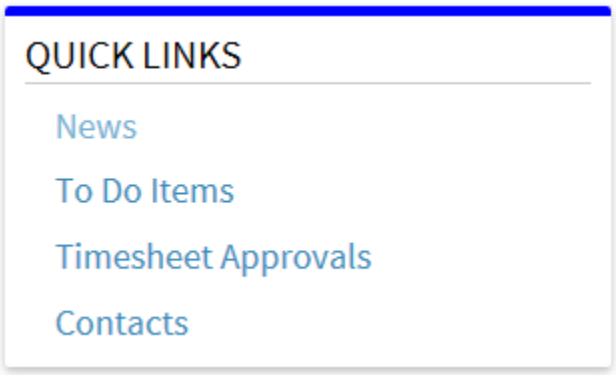
News

Path: Company > Tools > News

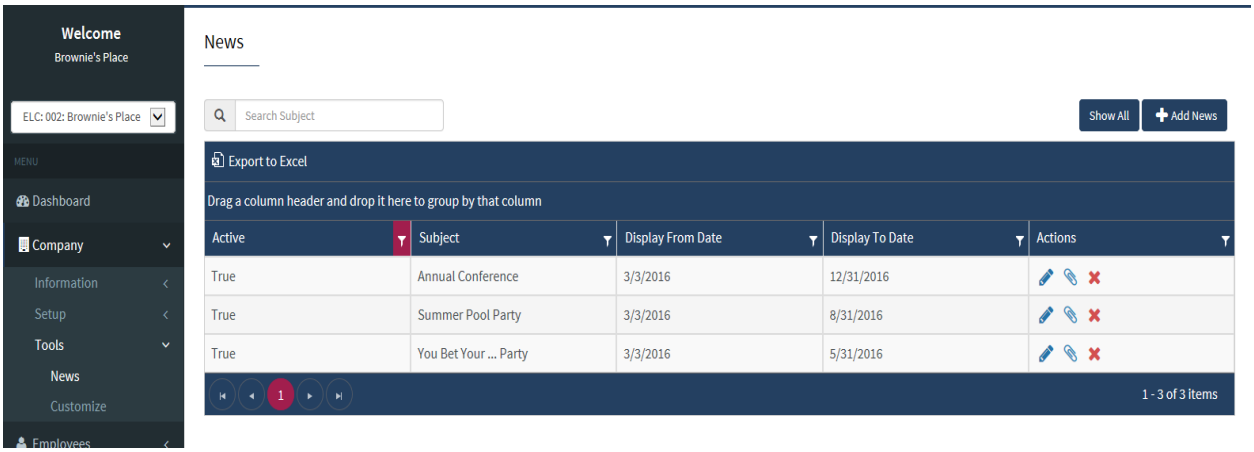
The News menu gives you the opportunity to add announcements that can appear on the Client and Employee Users dashboard under Quick Links > News (see screen shot below) when they log into DarwiNet.

News items can be distributed to all Client Users, all Employee Users, or both.

You can also select individual Employee Users to whom to distribute the announcement if you wish.

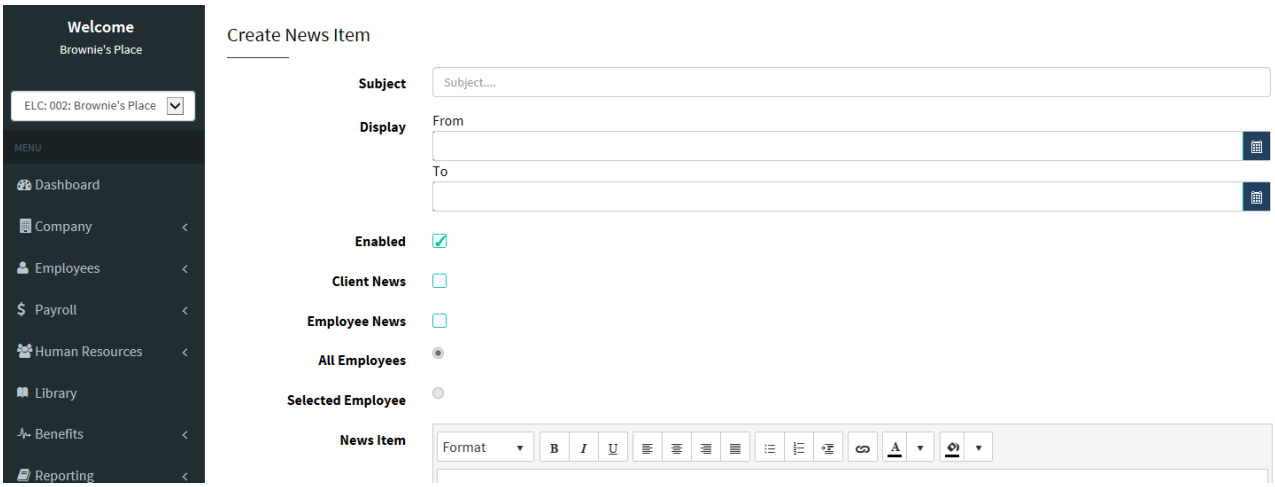


In the News menu (path: Company > Tools > News), you will see a listing of previously added news items (if there are any). Any news item can be edited by clicking in the actions column. Attachments can be added to a document by clicking on the icon. You can delete a news item by clicking the (if available - based on your access).



Adding a News Item

To add a news item start by clicking on the Add News button and you will see a screen for adding news items (example below).

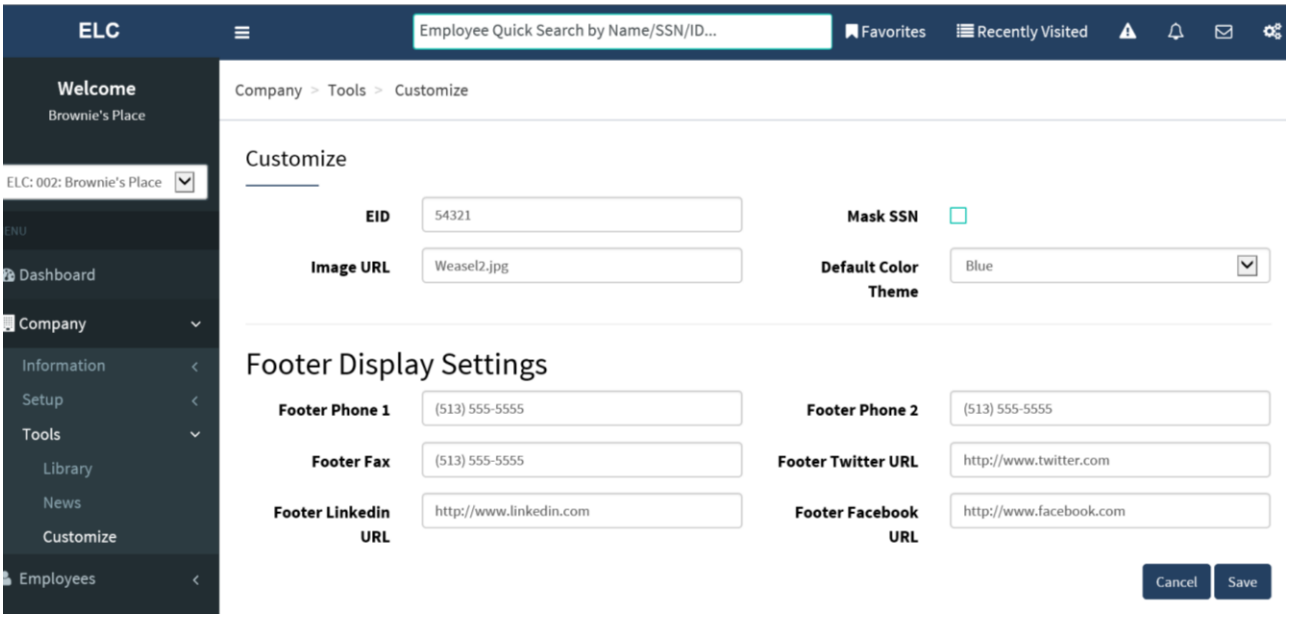


Subject	Add your subject. This will appear in bold on the news feed.
Display	Enter the beginning and end dates of when the news item will be displayed.
Enabled	If not selected, your news item will not be viewable
Client News	If checked, this will publish this news item to all Client Users.
Employee News	If checked, this will publish this news item to Employee Users.
All Employees	If this radio button is selected all Employee Users will receive the news item.
Selected Employees	Selecting this radio button will allow you to select specific Employee Users to receive the news item.
News Item	In this area you will enter the body of the message. The text can be formatted using the tool bar at the top of the box.

Customize

Path: Company > Tools > Customize

The Customize menu allows you to customize certain aspects of DarwiNet.



EID — This field contains the Employer ID for the client, if applicable. This is the federal employer identification number.

Mask SSN — If checked, this will cause all SSN's in DarwiNet to be masked using asterisks.

Default Color — This setting allows you to change the display color of the top and side bars in Theme DarwiNet. The Client and Employee level will both be affected by this change.

Large Logo — This field allows you to add a logo to DarwiNet that will display in upper left corner of the screen. The large logo is the image that will display when the menu bar is in expanded mode. To add an image, click on the Browse button and navigate to the location of the image on your computer or network. Click on the image file and click the open button. This will load the image into DarwiNet. You will need to log out and back in to see the image populate the screen.

Small Logo — This is the logo that will display when the menu bar is collapsed. It is recommended that you load the same image as the large logo, but this can be any image you choose. The ideal size for this image is 250x250 pixels.

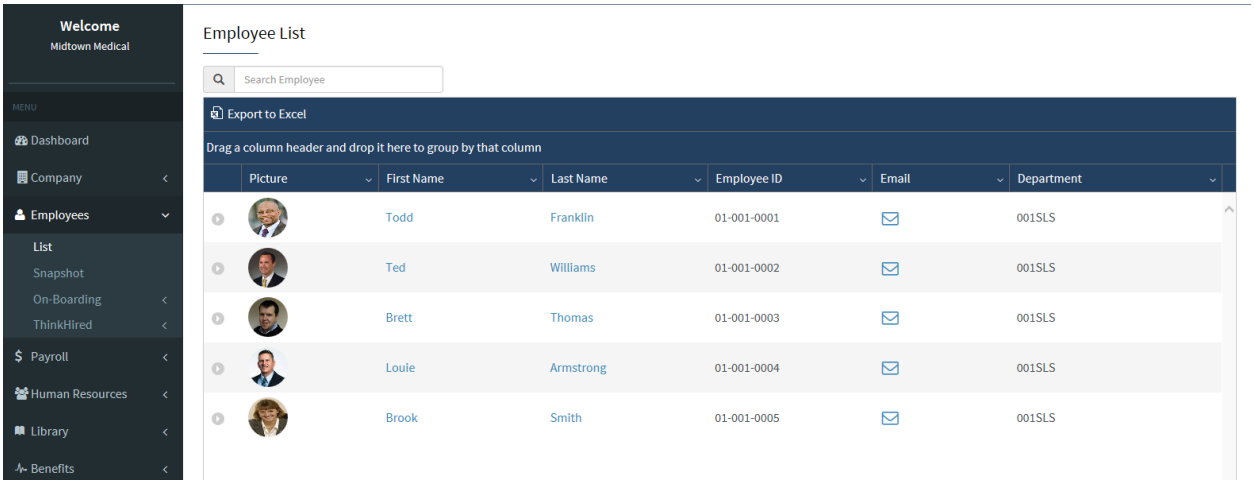
Footer Display Settings — This is the information that displays at the bottom of every page in DawiNet. These settings are only available at the client level if it allowed by the System Administrator. If you require access to these settings please contact your PEO. These settings are straight forward. Note that when you enter a URL for Twitter, LinkedIn, or Facebook the logo for each will appear in the lower left of the screen in the footer box.

Employees

List

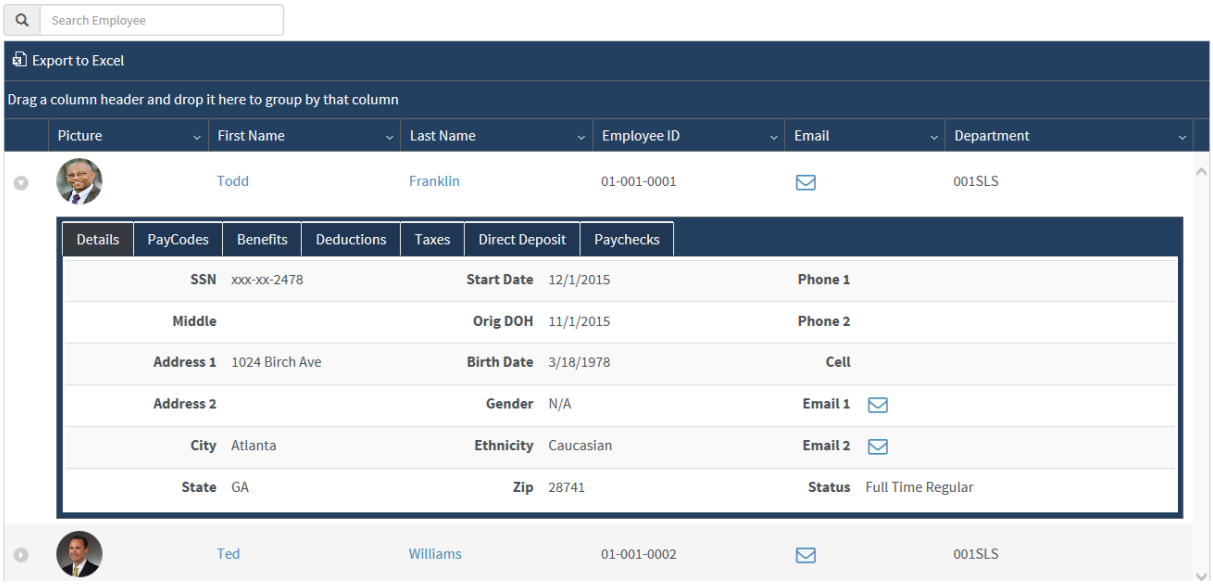
Path: Company > Employees > List

As the name implies, List is a listing of all of a client's employees that are currently in DarwiNet. Editing of all employee information can be done from this area.



Quick View

You can quickly view employee information without leaving the employee list. To do this, click on the arrow to the left of the employee name. A drop down box will appear listing the employee's information. You can browse through their information using the tabs at the top in this view (e.g. Details, Pay Codes, Benefits). Employee information cannot be edited from this view.

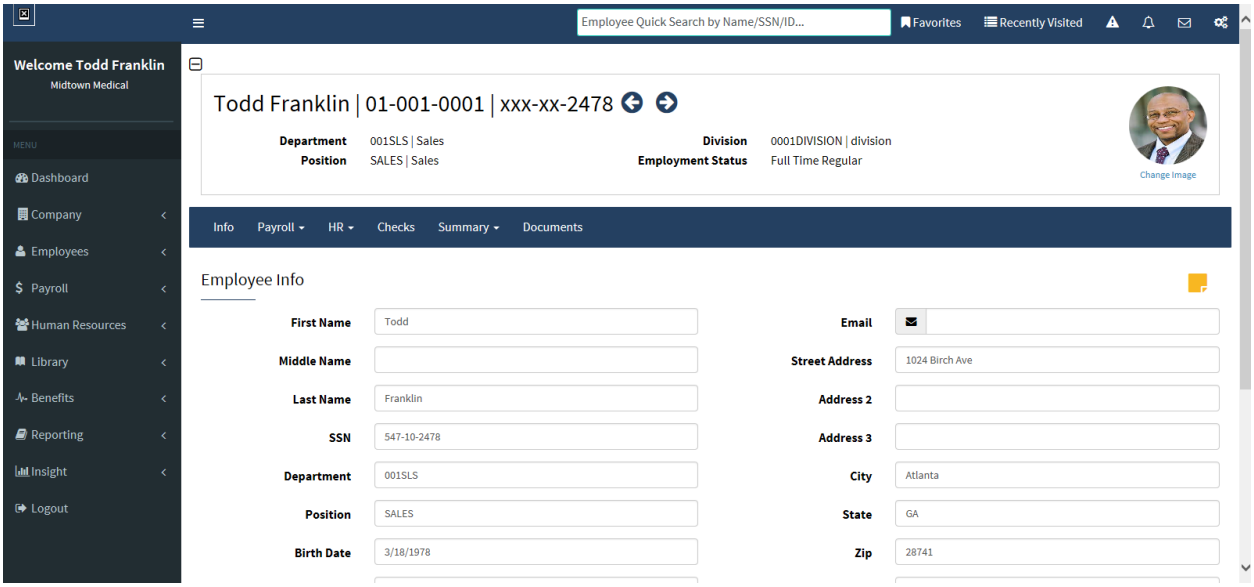


Editing Employee Record

If you have the appropriate access, an employee record can be edited by clicking on the employee name in the main screen (path for main screen is: Company > Employees > List). After you click on the name, you will see the employee's information (example below). In the employee info window you will see links to the other areas of the employee record on the column headings - such as: Info, Payroll, HR, and Checks. Click on the column headings (e.g. Payroll, HR, Checks) for additional menu options.

You can navigate to the next or previous employee without leaving this menu by using the arrow buttons at the top of the screen.

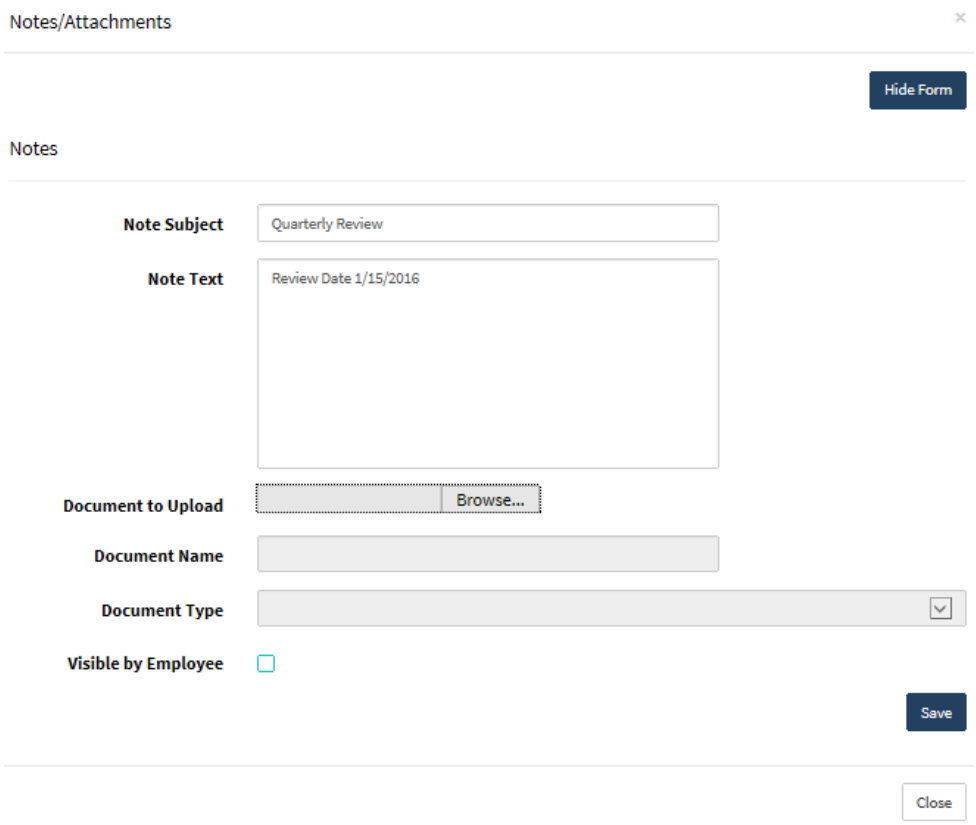
You can attach documents to the employee's record using the attachment icon .



Adding an Attachment

To add an attachment to an employee record, just click on the attachment icon on the Employee Info edit screen (see above screen shot). The Notes/Attachments window will appear. Here you can view or edit previously attached items or you can add new items. To add a new attachment, click on the *Add New Note/ Attachment* button. Add New Note/Attachment

The pop up form below will then appear.



Note Subject	This is the subject of the attachment that will display when viewing it in the attachment list
Note Text	You can enter notes here that may relate to the document.
Document to Upload	If you have a document to attach click the browse button and navigate to the document on your computer or network.
Document Name	This is the screen name of the document that will be displayed when viewing the attachment listing. You can give the document any name you like.
Document Type	This is a type you can set for the document that can be helpful in categorizing or filtering. Some default types are Form and Onboarding, but you can create your own document types.
Visible by Employee	If checked, The document will be visible to the employee in DarwiNet.

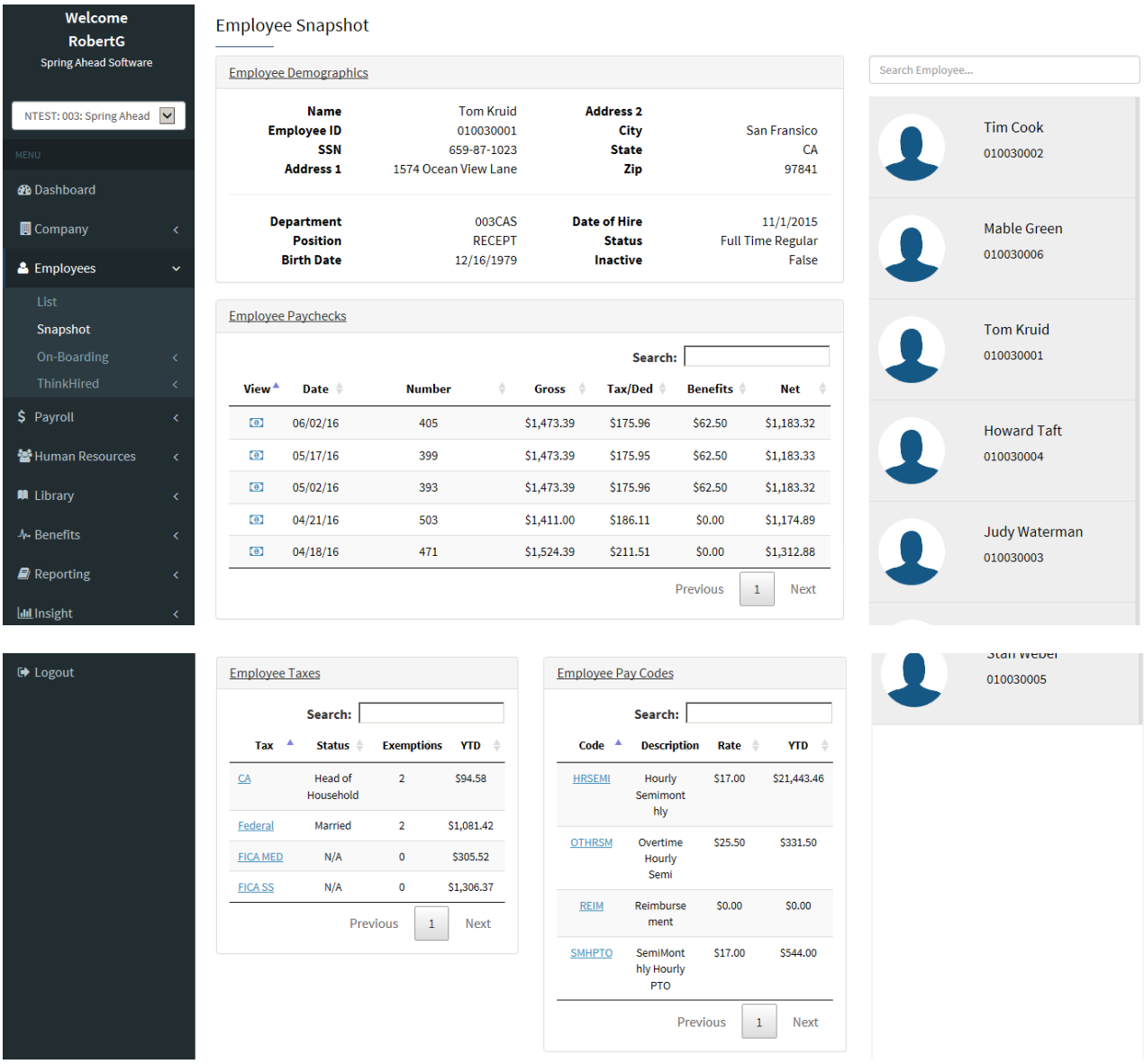
Snapshot

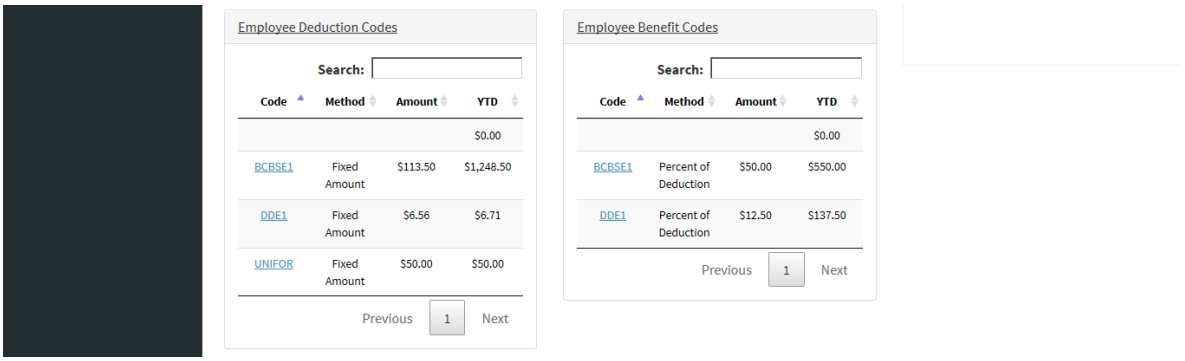
Snapshot

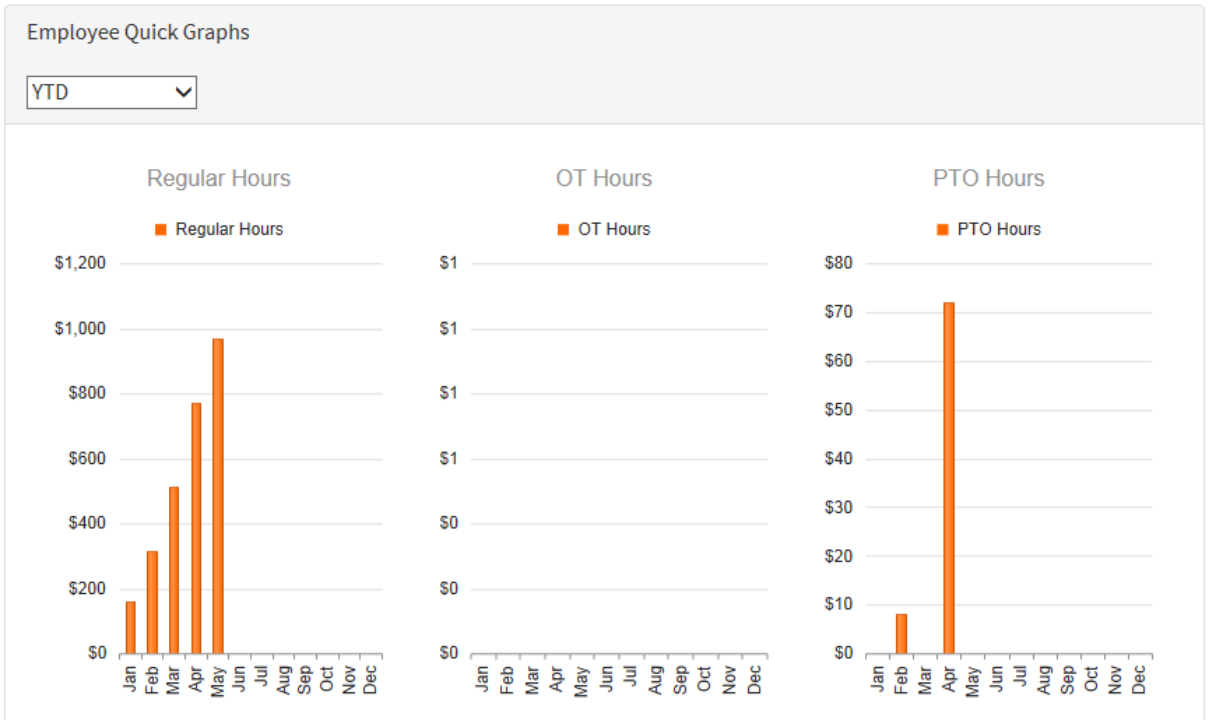
Path: Company > Employees > Snapshot

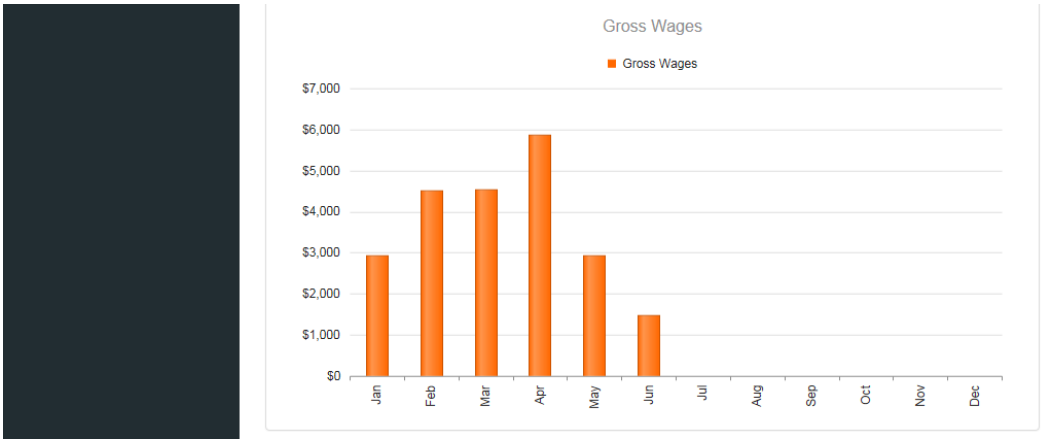
Snapshot is a quick listing of employee information that includes employee demographics, paychecks, taxes, pay codes, deduction codes, benefits codes, and graphs of hours and wages. These *Employee Quick Graphs* can be viewed by Year to Date or by the current month.

To change to a between employee snapshots you can click on the employee listing on the right side of the screen.




Employee Deduction Codes
Search:
Code
Method
Amount
YTD
$0.00
BCBSE1
Fixed Amount
$113.50
$1,248.50
DDE1
Fixed Amount
$6.56
$6.71
UNIFOR
Fixed Amount
$50.00
$50.00
Previous
1
Next
Employee Benefit Codes
Search:
Code
Method
Amount
YTD
$0.00
BCBSE1
Percent of Deduction
$50.00
$550.00
DDE1
Percent of Deduction
$12.50
$137.50
Previous
1
Next


Employee Quick Graphs
YTD
Regular Hours
Regular Hours
$1,200
$1,000
$800
$600
$400
$200
$0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
OT Hours
OT Hours
$1
$1
$1
$0
$0
$0
PTO Hours
PTO Hours
$80
$70
$60
$50
$40
$30
$20
$10
$0


Gross Wages
Gross Wages
$7,000
$6,000
$5,000
$4,000
$3,000
$2,000
$1,000
$0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

On-Boarding

Separate documentation is available for On-Boarding

ThinkHired

ThinkHired is an enhanced employee onboarding process integrated with DarwiNet. Candidates can apply for a position through the DarwiNet website to use the functionality provided through ThinkHired. Once the candidate is hired then the candidate information can be uploaded and used during the employee On-Boarding process.

Note: ThinkHired functionality can be enabled by a System level user at the Client Customization page. The path is: *Client Maintenance -> Clients -> Customization* (under On-Boarding Options).

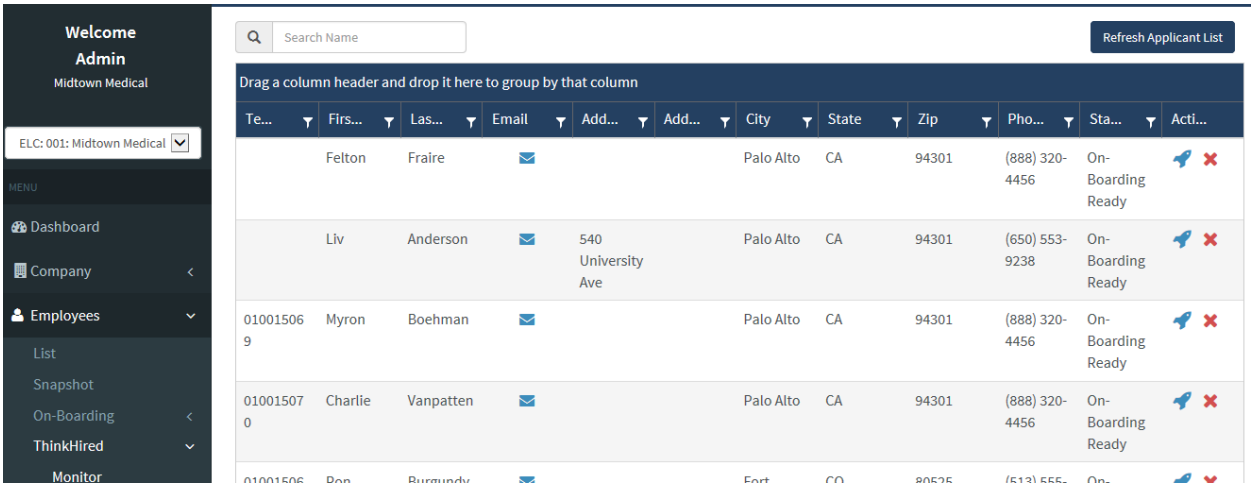
When you are enabling ThinkHired (when logged in as a system user – see note and path above) you will have these two options:

Use ThinkHired: Enables ThinkHired for the selected Client ID.

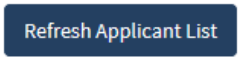
ThinkHired All Jobs: Allows user to see all employees that have been brought over from ThinkHired for a Client. Instead of only Employees associated to a specific DarwiNet user.

Monitor

Once an applicant has been marked as 'Hired' using the ThinkHired application, they will be transferred to the ThinkHired Monitor within DarwiNet. From here, the Employee can be moved to On-Boarding.



: Click on the blue rocket icon in the Actions column. DarwiNet will take the demographic information about the Employee that was gathered by ThinkHired and prepopulate it into the 'Sign On/Personal Information' tasks of whichever OnBoarding Profile the client assigns to the Employee for use during their OnBoarding Process.

Note: If Employee is not displaying, use the Refresh Applicant List button 

which will refresh the grid to re-display possible incoming data.

Depending on the selection used when enabling ThinkHired at the system level, the ThinkHired Employees Monitor will either show only applicants that have been hired by this specific client user or it will show all applicants hired by any user for the client to which they are assigned.

The default view of this screen is to only show employees who are marked 'On-Boarding Ready'. This means that DarwiNet received the initial Hire request from ThinkHired, and was able to pull back further applicant data from ThinkHired.

Status Options:

On-Boarding Ready:	Applicant information has been retrieved from ThinkHired and the applicant is ready to be on-boarded.
On-Boarding:	This means that an On-boarding Ready applicant has been assigned to an OnBoarding process.
On-Boarded:	This means the employee has been fully on-boarded.
Declined:	There was an error that occurred while attempting to get the Applicant Data from ThinkHired, or the employee is a duplicated record.

Note: With some versions of Microsoft's Internet Explorer browser (called IE by many), a transfer may not come through directly. It is recommended that you disable compatibility mode, or add this site as a trusted site and set 'Access data sources across domains' option in security settings to either 'Prompt' or 'Enable'.

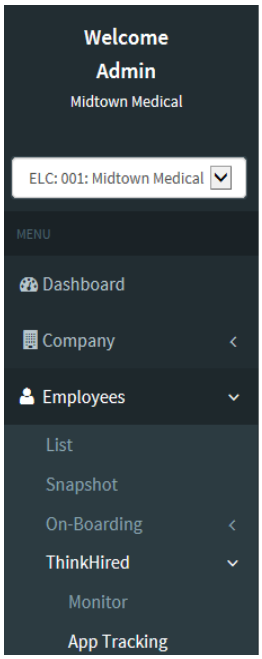
App Tracking

To utilize ThinkHired applicant tracking, the client user will need to have been enabled at the system level of DarwiNet.

Once enabled, the client can log in and select 'ThinkHired' from the HR and Benefits menu drop down.

This will do a number of things.

1) It will validate if the client is enabled for use with ThinkHired, if not, a message will be shown to prompt them to contact their PEO/ASO service provider to request access.
2) Once validated, it will attempt to create/update the ThinkHired SSO (Single-Sign-On) credentials for their userID on the ThinkHired portal.
3) If the SSO Creation/Update is successful, it will attempt to then automatically log the user into ThinkHired.
4) If the login is successful, ThinkHired will open in a new browser window/tab, and the 'content' section of the DarwiNet website will inform them that they need to have pop up blockers disabled.



ThinkHired will open in a new window.

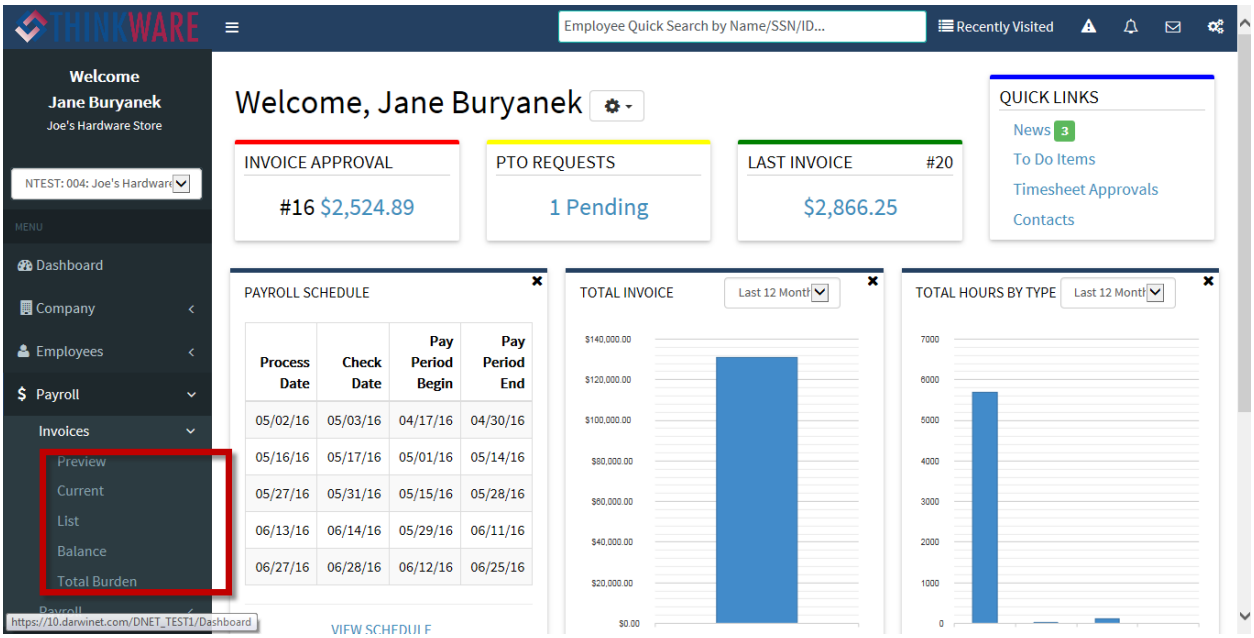
Please make sure all pop-up blockers are disabled.

5) GetHired.com should open in a new browser window/tab, at which point the client can create job posts, review applicants and eventually hire selected candidates.

Payroll

Invoices

Select ***Payroll > Invoices*** from the side menu to see the five options. See screen shot below for a visual.

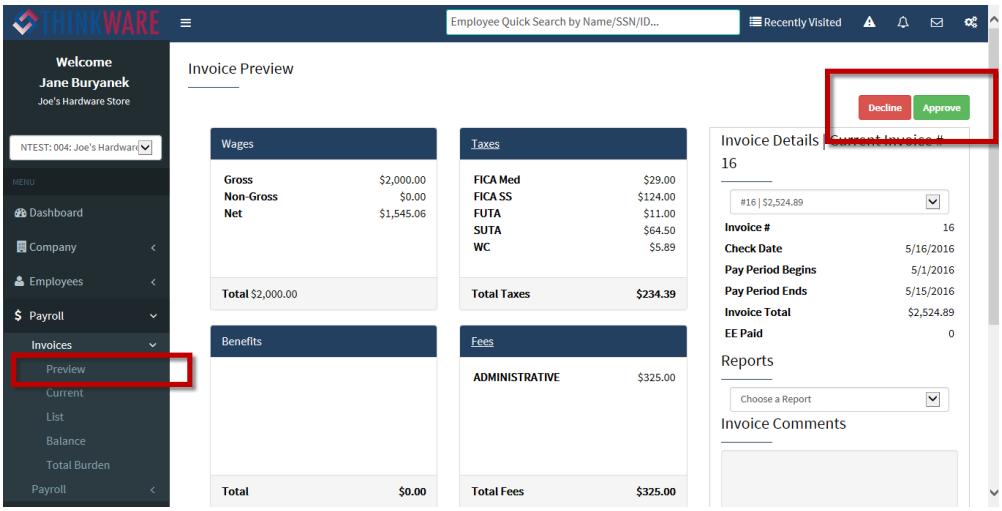


Options:

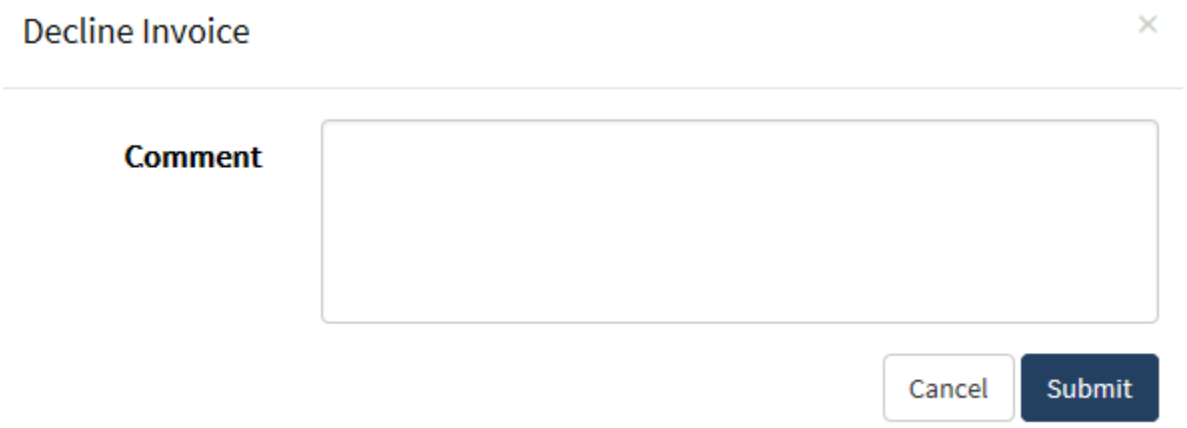
- Preview
- Current
- List
- Balance
- Total Burden

Preview

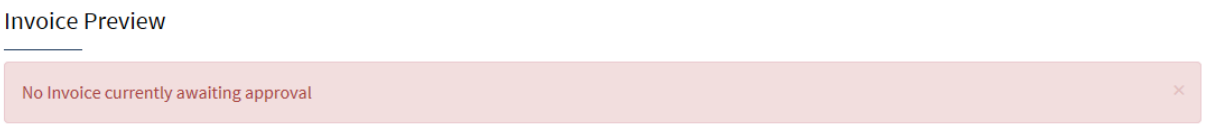
Select ***Preview.*** A client that is set up for invoice preview will have this screen once the invoice is available. The user can select to decline or approve the invoice by selecting the box in the top right corner.



Once an invoice is approved or declined a new window will appear. This is for the client to write comments to PEO (example screen below). Click submit when done.

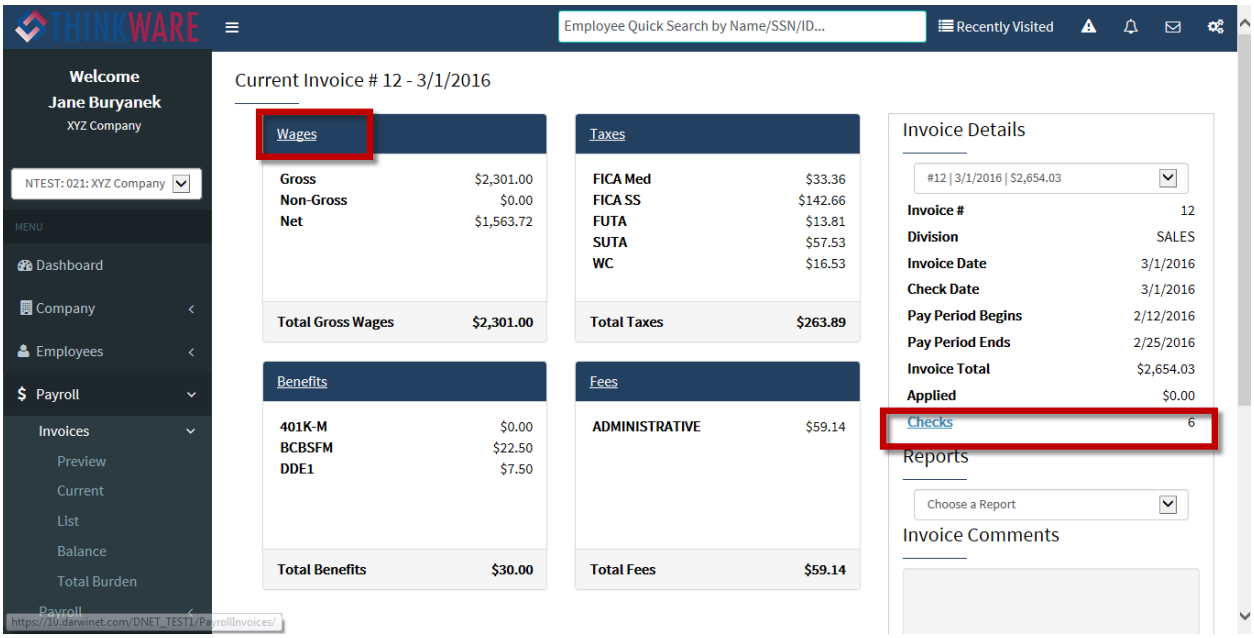


This message below will appear if a client doesn't have an invoice available to decline or approve.

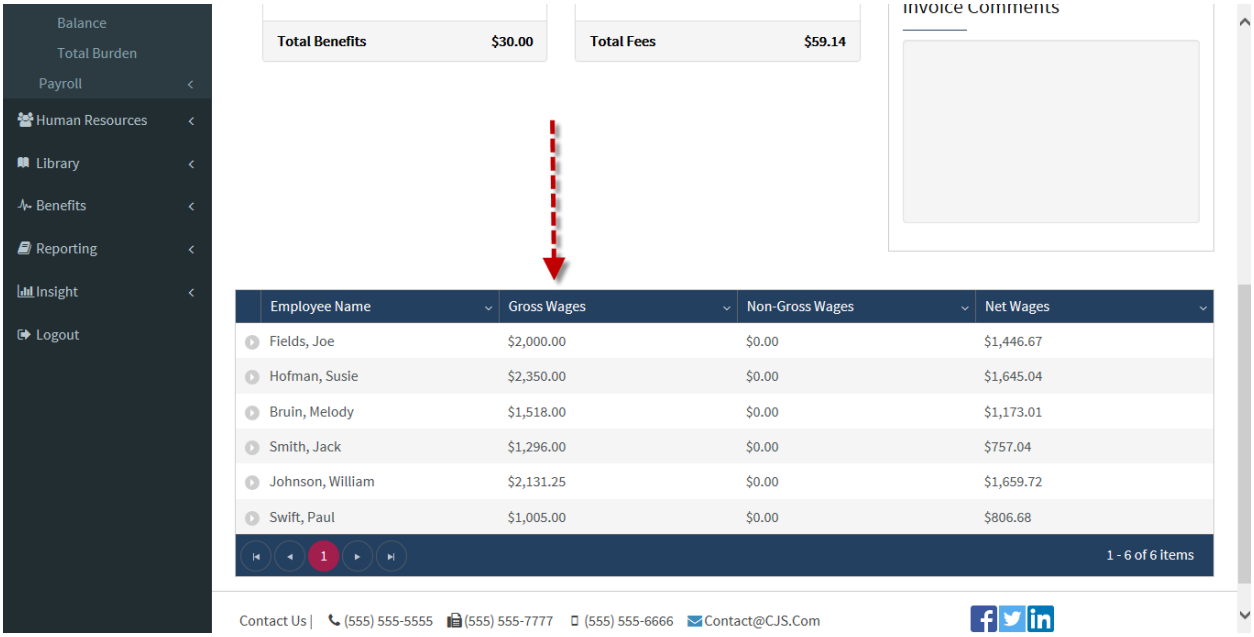


Current

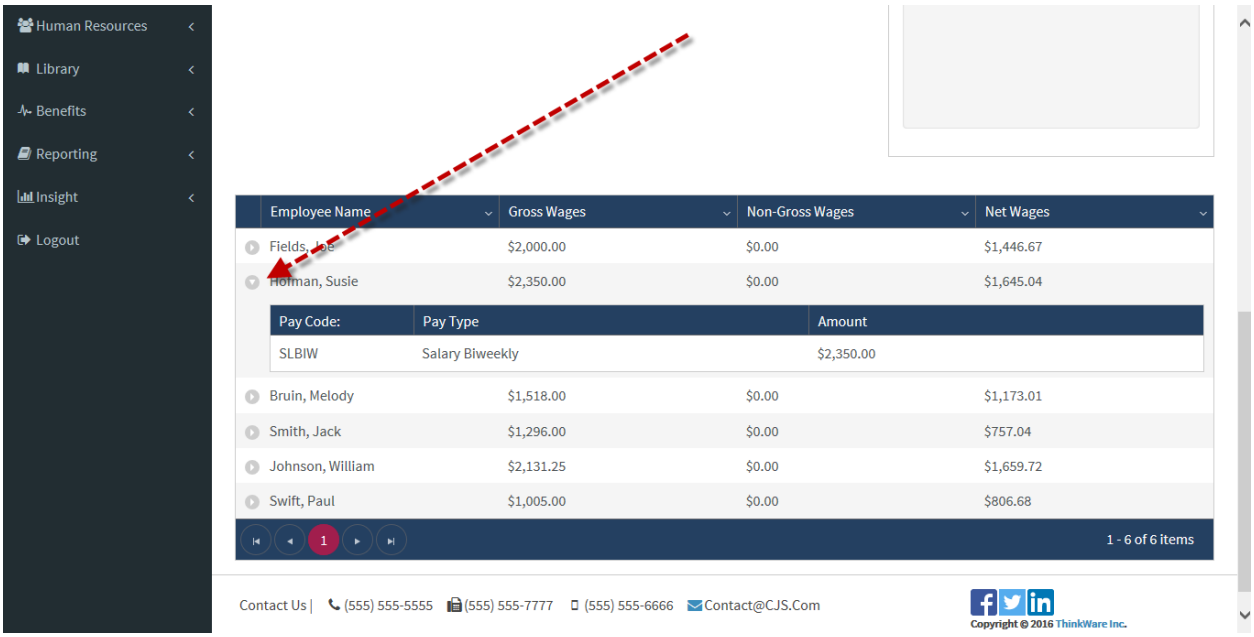
Select *Current* on the navigator. If a current invoice is available, the detail of the most current invoice will show. To get additional detail on wages, taxes, benefits, or fees, click on the header.



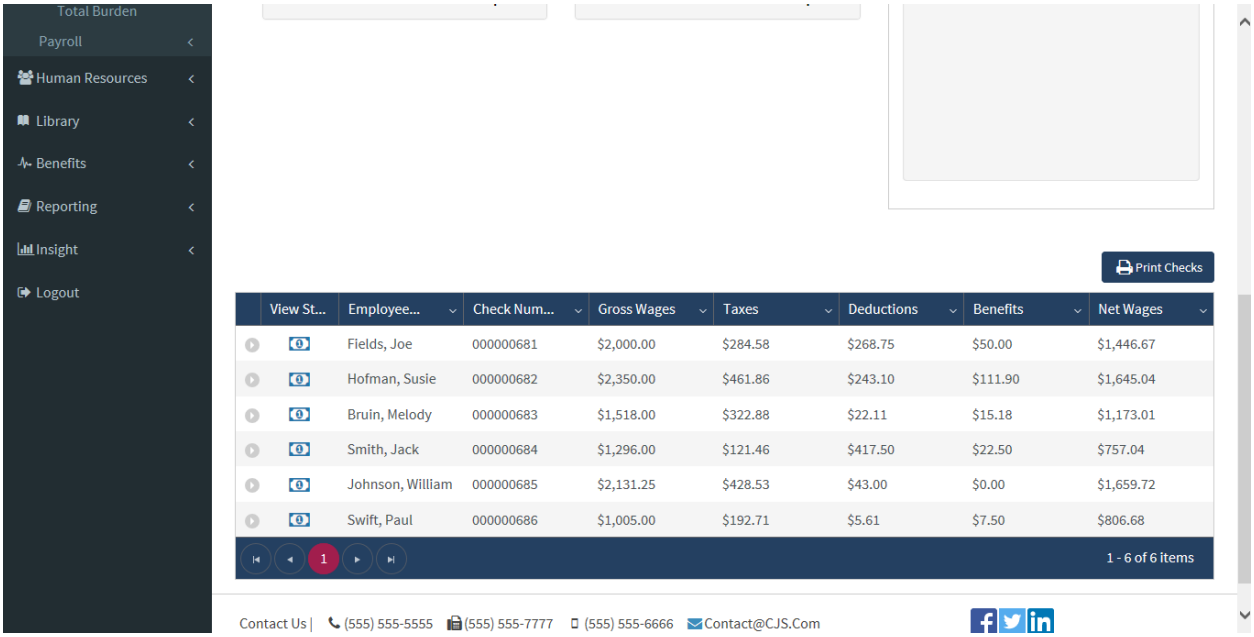
This screen shot below is an example of additional detail presented (below the main screen) after clicking on Wages.



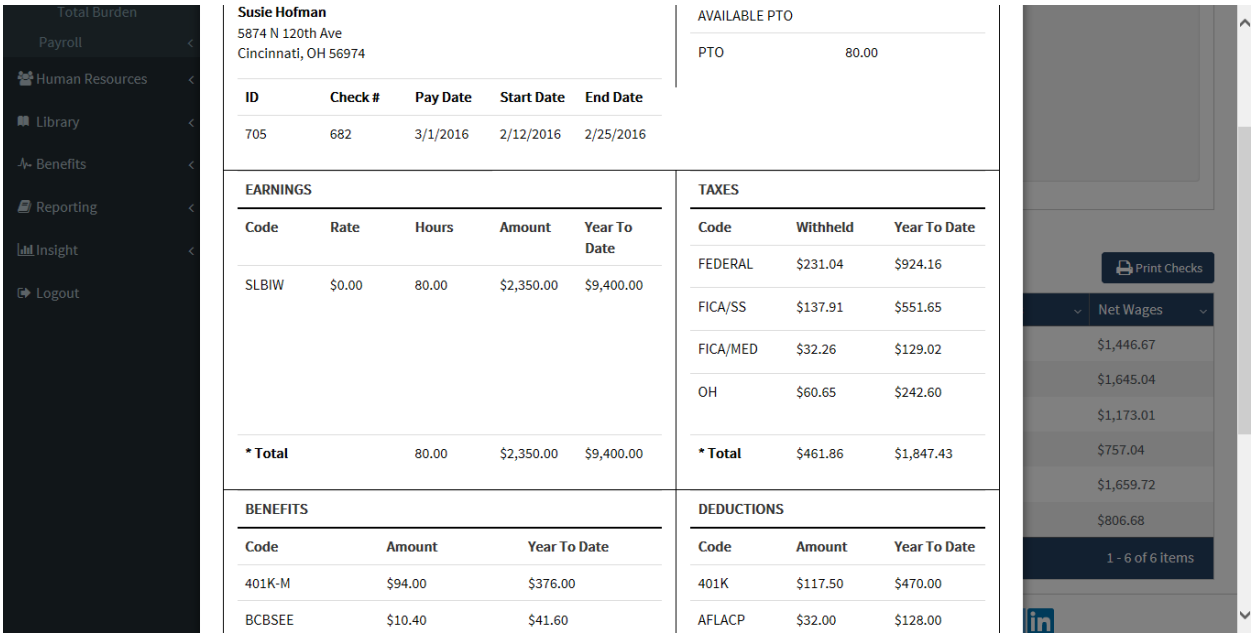
The expand button by the employee name will open up to show further detail (see below).



In addition, on the main screen, employees checks can be vie w by clicking on the Checks link **Checks**

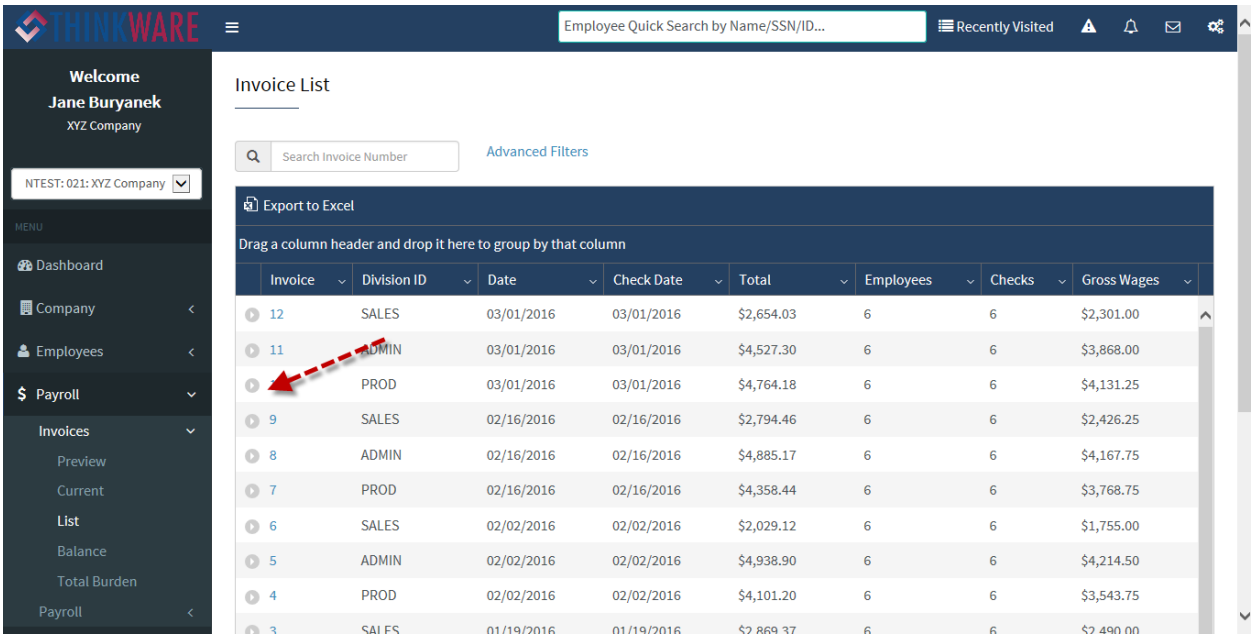


The icon in the Checks view allows you to see the employee pay stub.



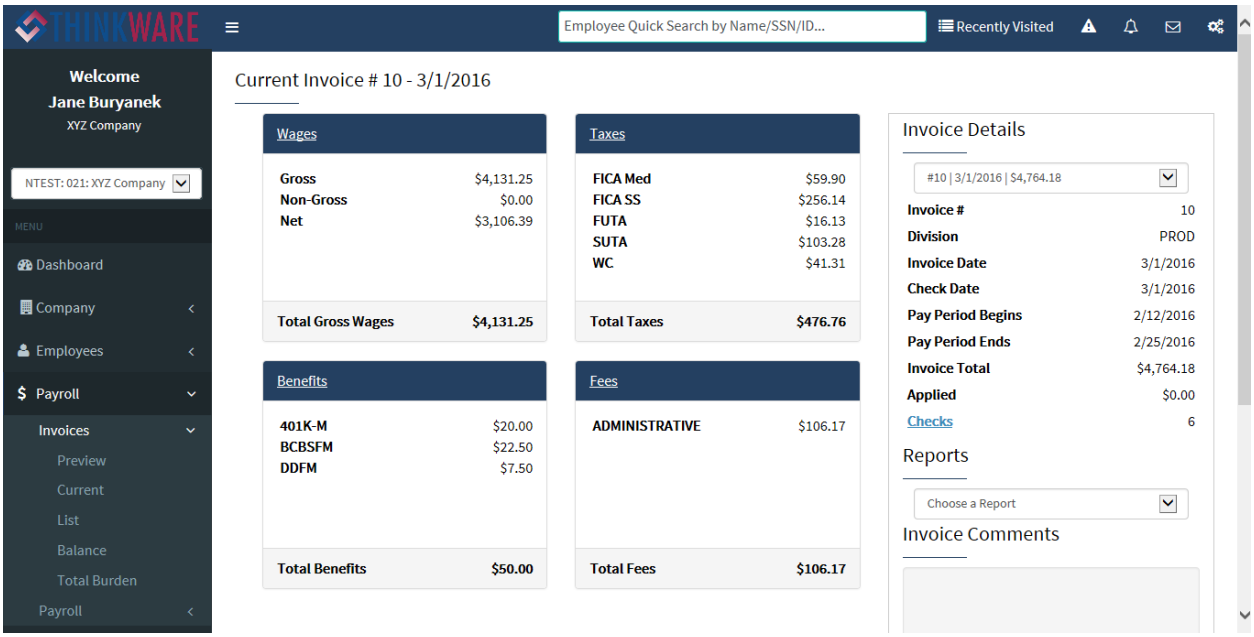
List

A list of invoices can be selected from side menu / navigator.

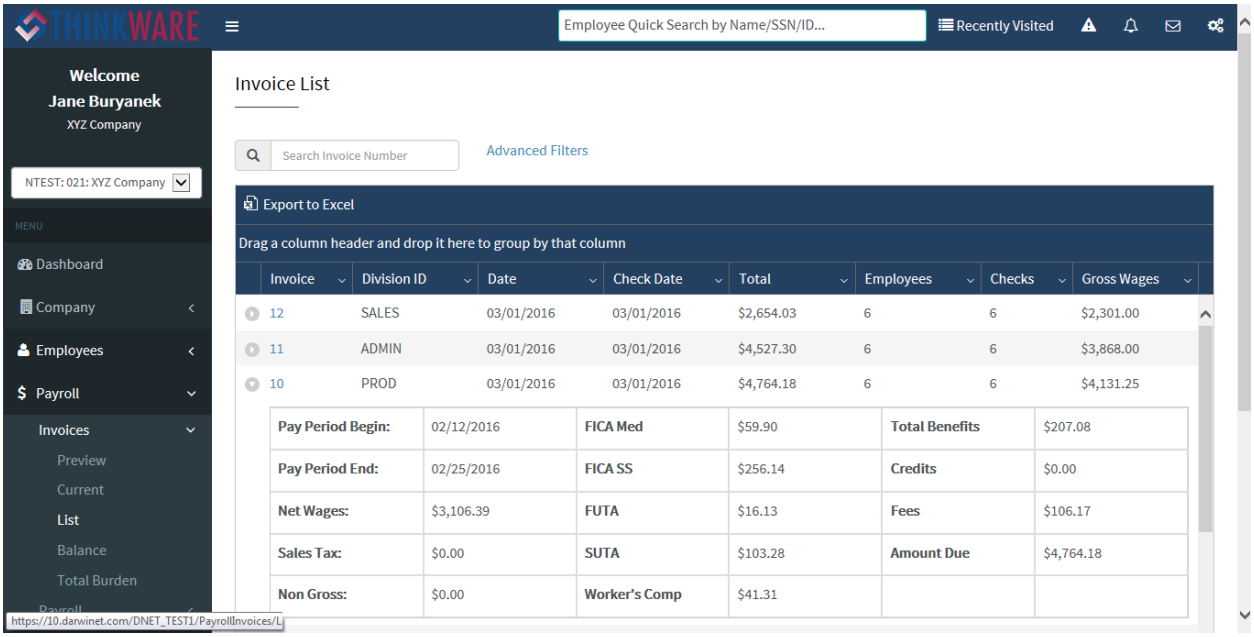


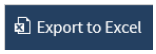
By selecting the invoice number, you can see invoice detail (example below). To get additional detail on wages, taxes, benefits, or fees, click on the header. Employee's checks can be view by clicking on the Checks link **Checks**

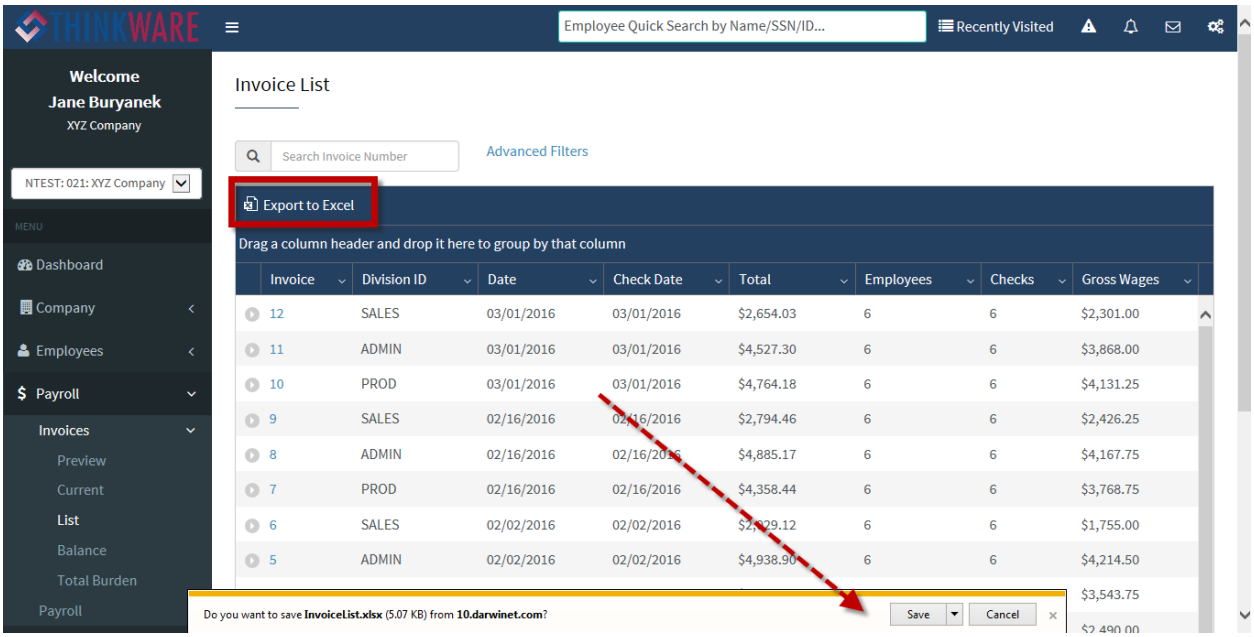
The icon in the Checks view allows you to see the employee pay stub.



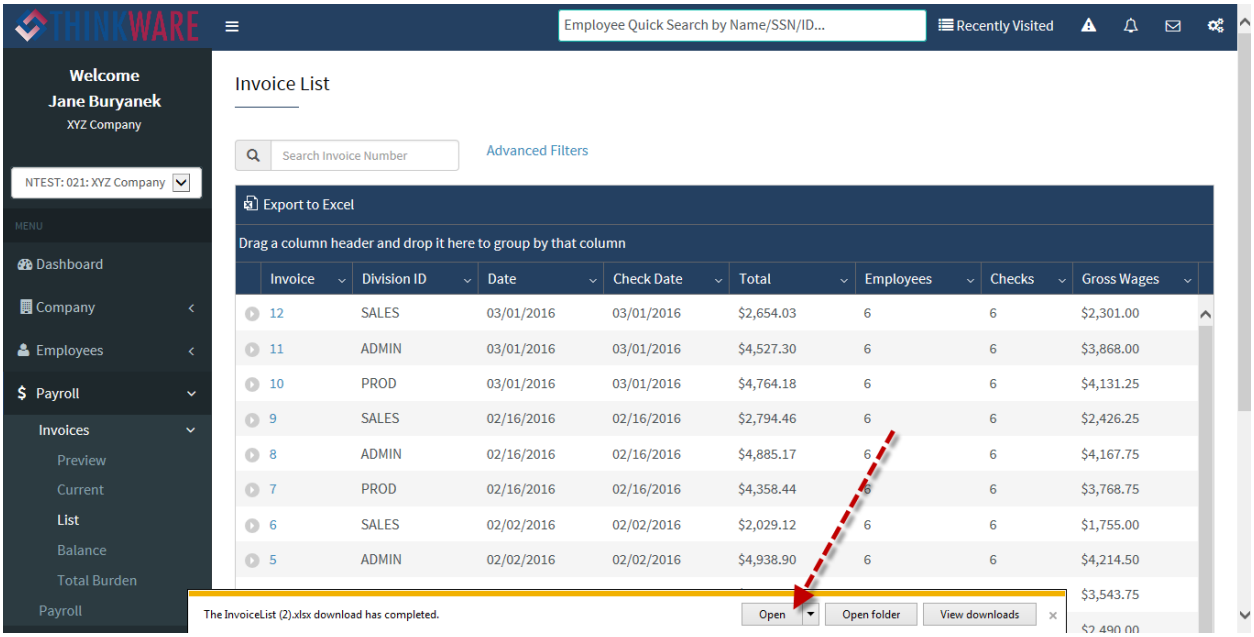
In the main List view, you can also use the arrow button to expand the view for more information on that invoice (see sample below).



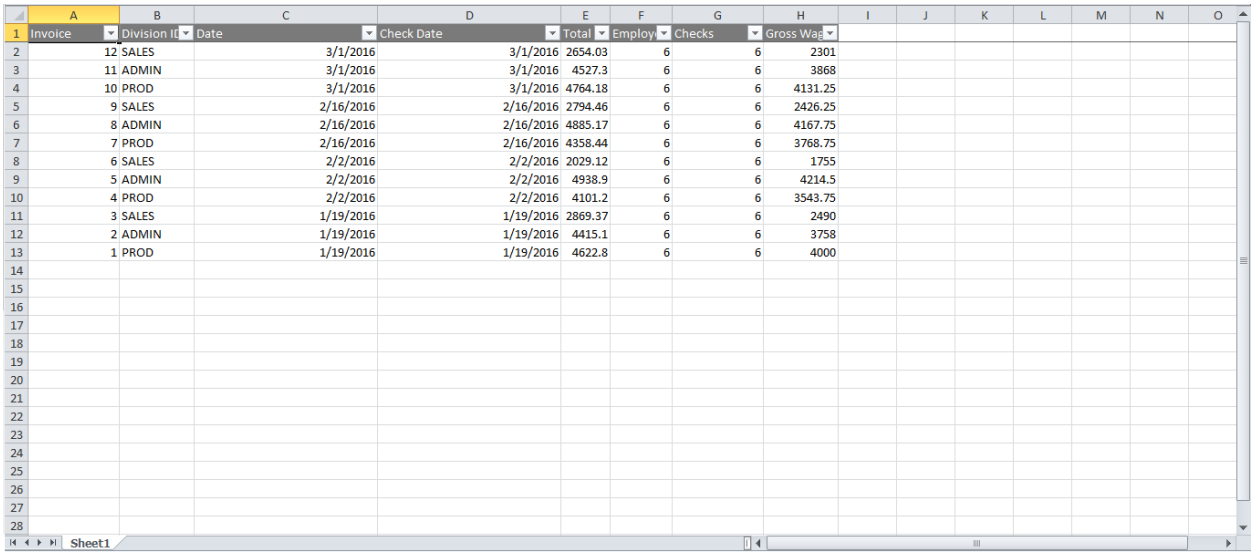
These lists can be exported to excel by clicking the *Export to Excel* button. 



The dialogue box to prompt you to *Save* or *Cancel* appears (see above).



The next dialogue box gives the option to *Open, Open Folder* or *View Downloads* (see picture above). Normally, you would click *Open*.



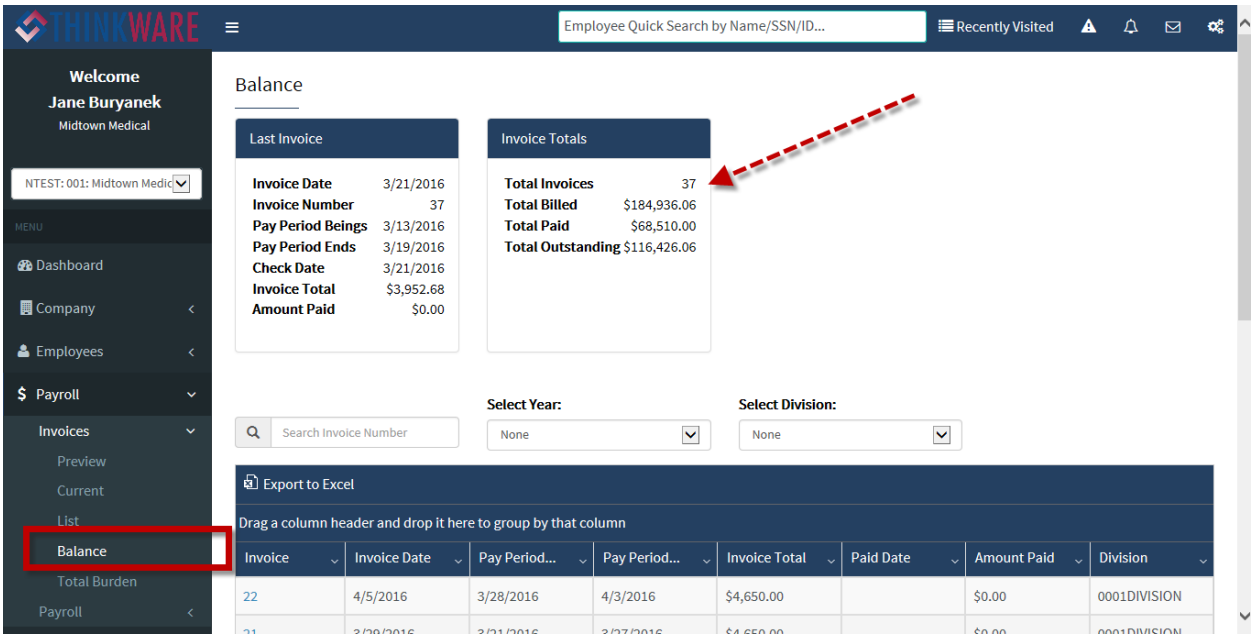
Invoice	Division ID	Date	Check Date	Total	Employ	Checks	Gross Wag
12	SALES	3/1/2016	3/1/2016	2654.03	6	6	2301
11	ADMIN	3/1/2016	3/1/2016	4527.3	6	6	3868
10	PROD	3/1/2016	3/1/2016	4764.18	6	6	4131.25
9	SALES	2/16/2016	2/16/2016	2794.46	6	6	2426.25
8	ADMIN	2/16/2016	2/16/2016	4885.17	6	6	4167.75
7	PROD	2/16/2016	2/16/2016	4358.44	6	6	3768.75
6	SALES	2/2/2016	2/2/2016	2029.12	6	6	1755
5	ADMIN	2/2/2016	2/2/2016	4938.9	6	6	4214.5
4	PROD	2/2/2016	2/2/2016	4101.2	6	6	3543.75
3	SALES	1/19/2016	1/19/2016	2869.37	6	6	2490
2	ADMIN	1/19/2016	1/19/2016	4415.1	6	6	3758
1	PROD	1/19/2016	1/19/2016	4622.8	6	6	4000

Sheet1

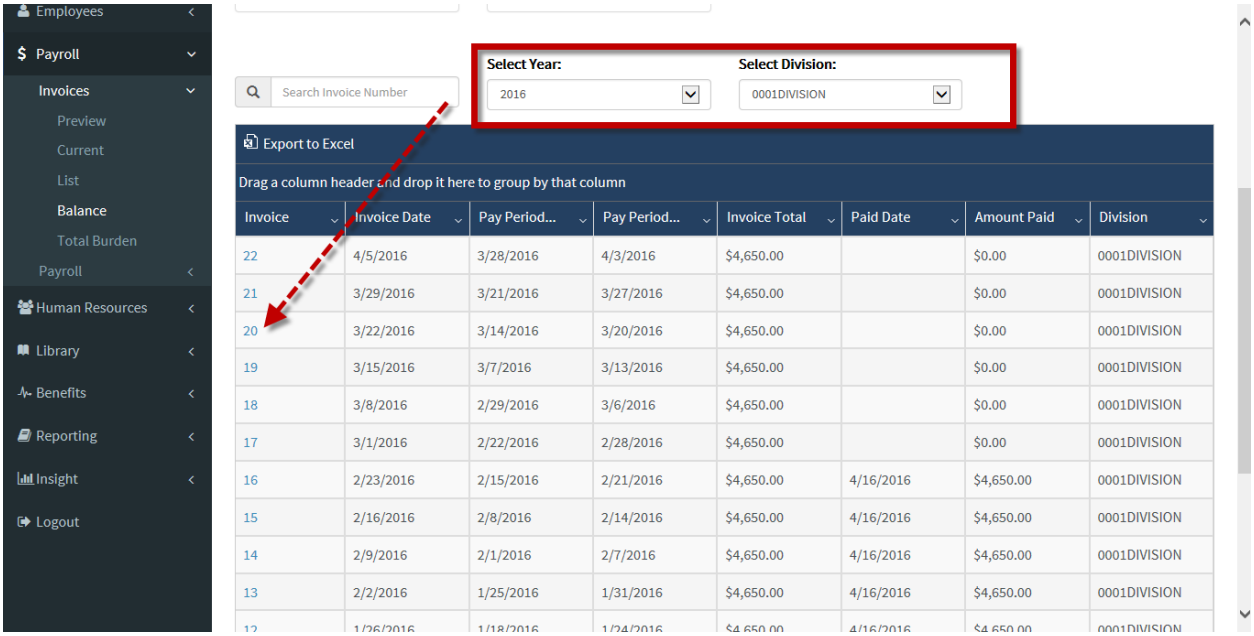
If you clicked open, the Excel report appears for you to modify and save (and other options). See example above.

Balance

Balance can be selected from the side menu /navigator . This will show the overall balance due and the invoices that comprise that total.



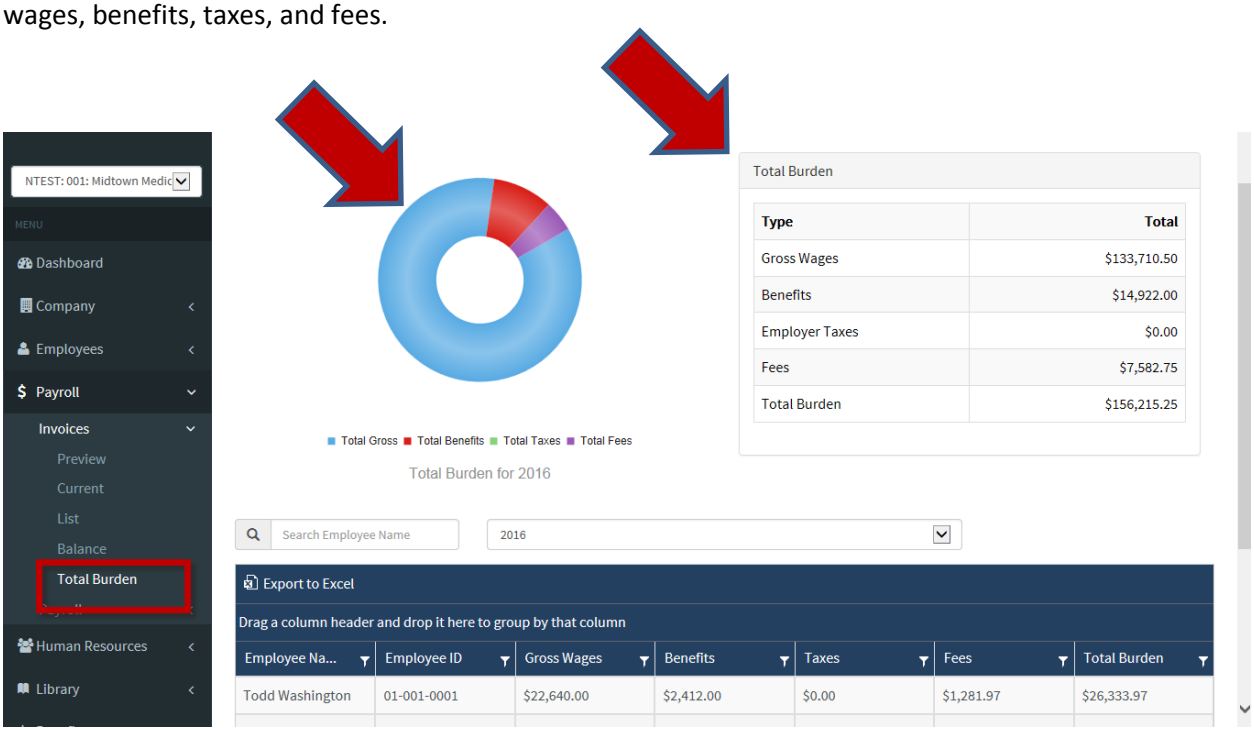
For the grid for the list of invoices at the bottom of this view (see below) user can select year and division for list of invoices for those parameters. Users can also search for an invoice.



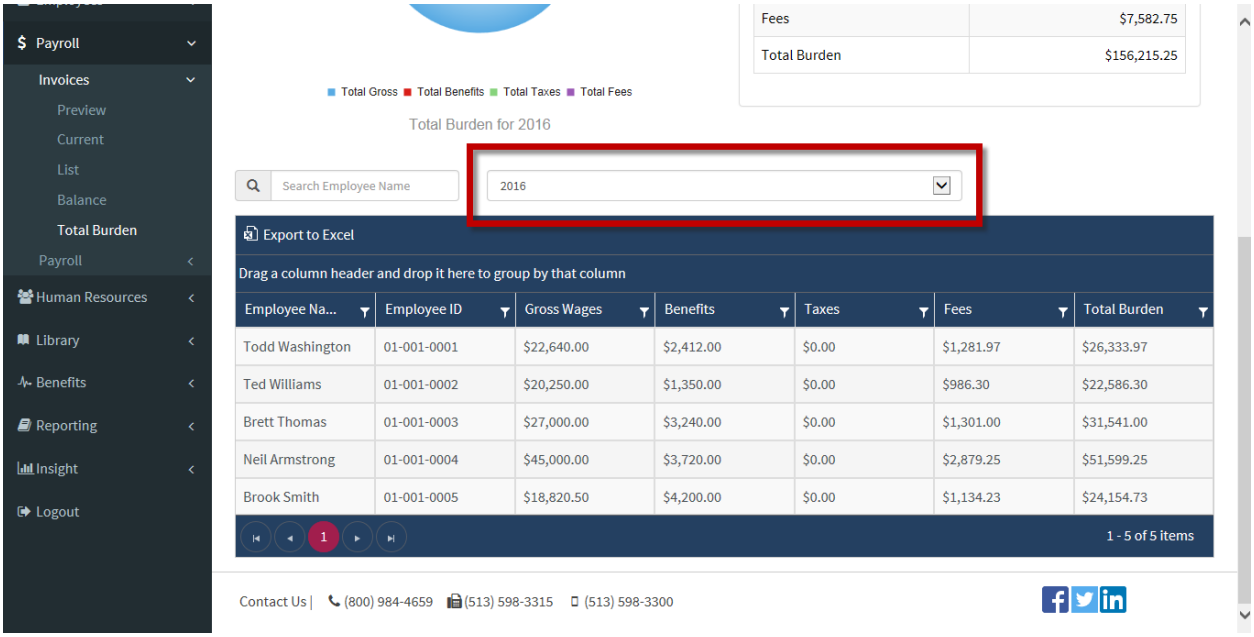
The bottom grid will show individual invoices. Click on the invoice number (e.g. 20 in the example above) to get to the invoice.

Total Burden

Select Total Burden (path: Payroll > Invoices > Total Burden) on the side navigator. The top portion of Total Burden will show the amounts employers pay for employees. The graph will show the portion for wages, benefits, taxes, and fees.



The bottom grid (example below) will show individual employees that make up the totals listed above. The total burden year can be selected from drop down box above the grid (see red rectangle below).



Payroll

Payroll

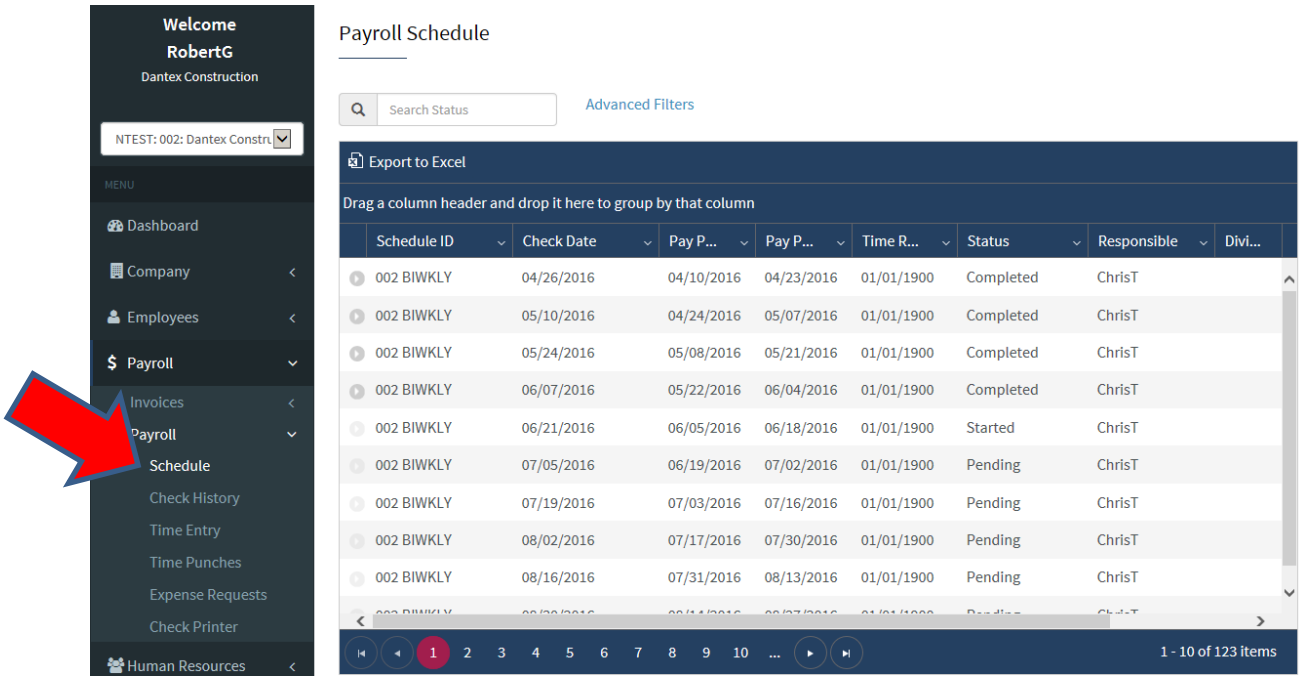
Select *Payroll* on the side menu.

Payroll Selections

- Schedule
- Check History
- Time Entry
- Time Punches
- Expense Requests
- Check Printer

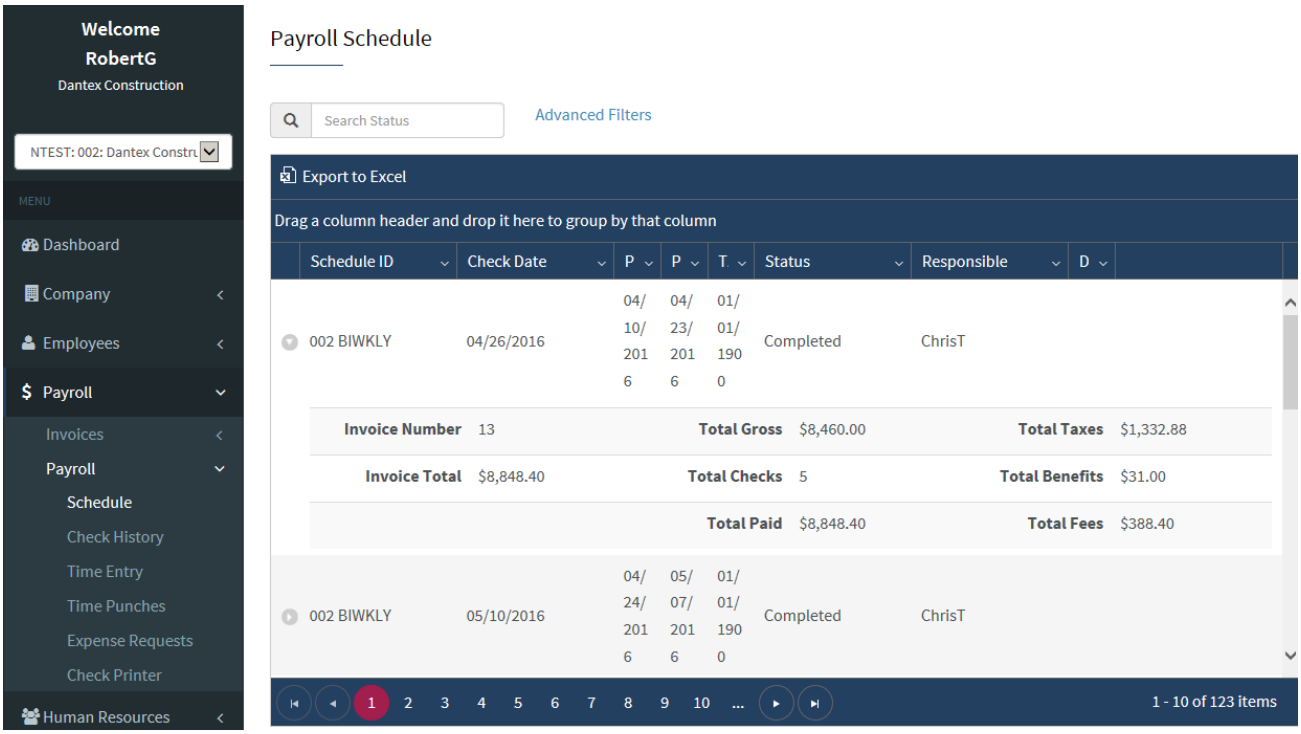
Schedule

Select *Schedule* on the side menu.



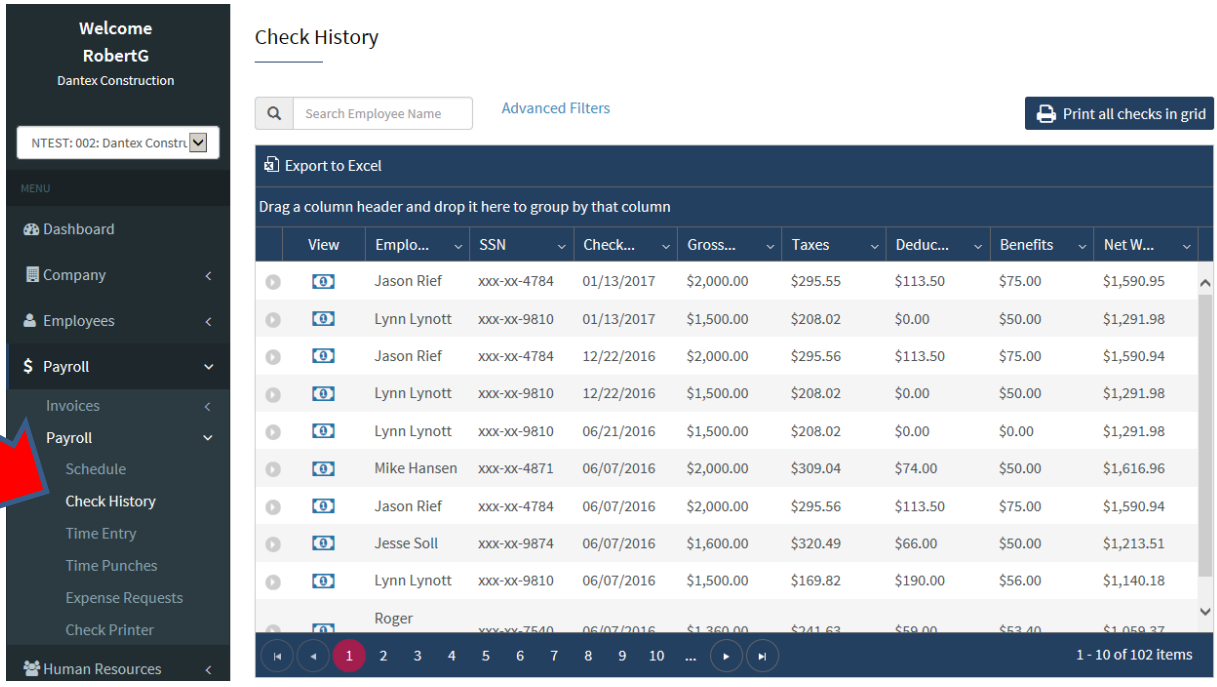
The payroll Schedule can be set up in Darwin under Microsoft GP/Tools/Setup/Payroll/Schedule Maintenance. This schedule will integrate over to DNet 2.0. The schedule in Dnet 2.0 can be assigned to a particular timesheet profile at the system level, which will allow the user to create a timesheet straight from the payroll schedule.

Expansion (click on) allows you to see more detail on a particular payroll schedule.

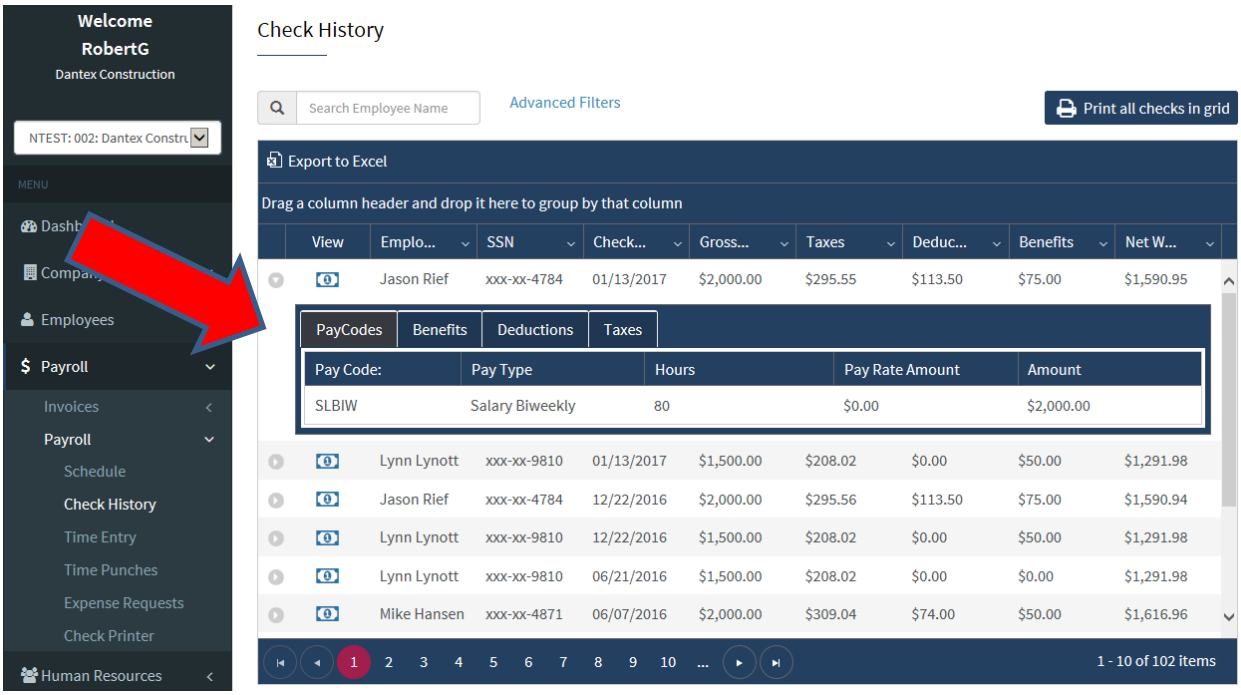


Check History

Select *Check History* on the side menu. You will see paychecks that have been processed



Expansion of a row (click on) allows for detail of paycodes, benefits, deductions, and taxes. See example below. Click on any of the columns (PayCodes, Benefits, Deductions, and Taxes) for more detail on that topic.



The View Stub icon will allow user to see details on an employee's check. Click on this icon to see the details for that individual (example below).

Statement of Earnings

Dantex Construction

ID: 01-002-0004

Lynn Lynott
6541 Ave L
El Paso, TX 78453

AVAILABLE PTO

PTO 3.07

ID	Check #	Pay Date	Start Date	End Date
508	508	1/13/2017	1/13/2017	1/13/2017

EARNINGS

Code	Rate	Hours	Amount	Year To Date
SLBIW	$0.00	80.00	$1,500.00	$1,500.00
*** Total**		80.00	$1,500.00	$1,500.00

TAXES

Code	Withheld	Year To Date
FEDERAL	$93.27	$93.27
FICA/SS	$93.00	$93.00
FICA/MED	$21.75	$21.75
TX	$0.00	$0.00
*** Total**	$208.02	$208.02

BENEFITS

Code	Amount	Year To Date
BCBSFM	$50.00	$50.00
*** Total**	$50.00	$50.00

DEDUCTIONS

Code	Amount	Year To Date
*** Total**	$0.00	$0.00

Net Wages **Current** $1,291.98 | **YTD** $1,291.98

Net Deposit $1,291.98

Offered Hours 0.00

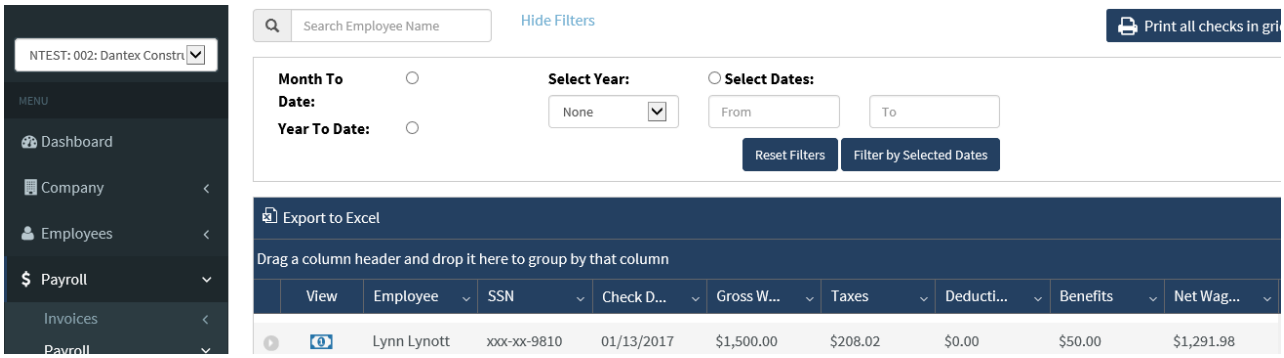
Message To You
Message To All Employees

If you have any questions regarding your pay stub, please contact your Payroll Administrator.
*Total Earnings Year To Date may include codes not used in this pay period.

Close

Filtering List of Paychecks

When you click on Advanced Filters you will see a screen similar to the one below:



When you click on *Month to Date:* or *Year To Date:* the data / pay checks view below changes to provide the requested pay checks for that period of time.

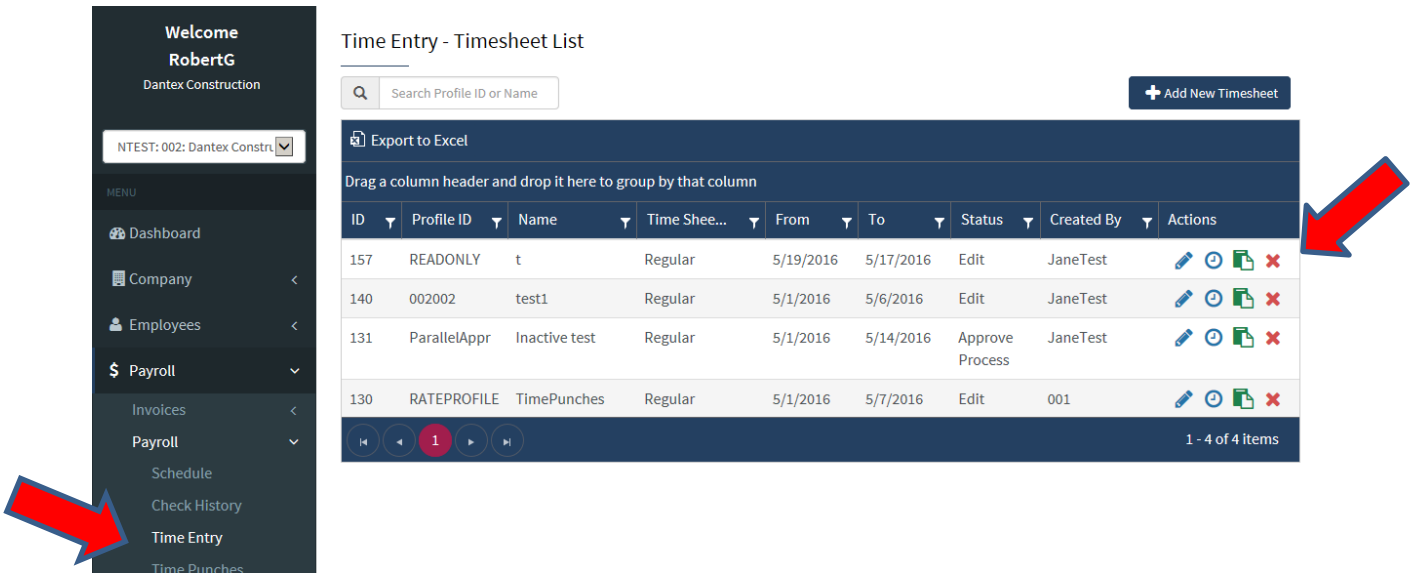
You can select *Year:* to have the information from that year presented.

Or use *Select Dates:* to select the time frame. Then click on Filter by Selected Dates to get the pay checks in the selected time frame.

Click on Reset Filters to go back to the default view.

Time Entry

Select *Time Entry* on the left navigator to create a timesheet to enter or consolidate employee time into a timesheet. You should see a screen similar to the one below.



Any timesheet created but not released will appear in the grid. The following modifications can be made to a timesheet:

This will open the timesheet to allow user to edit.

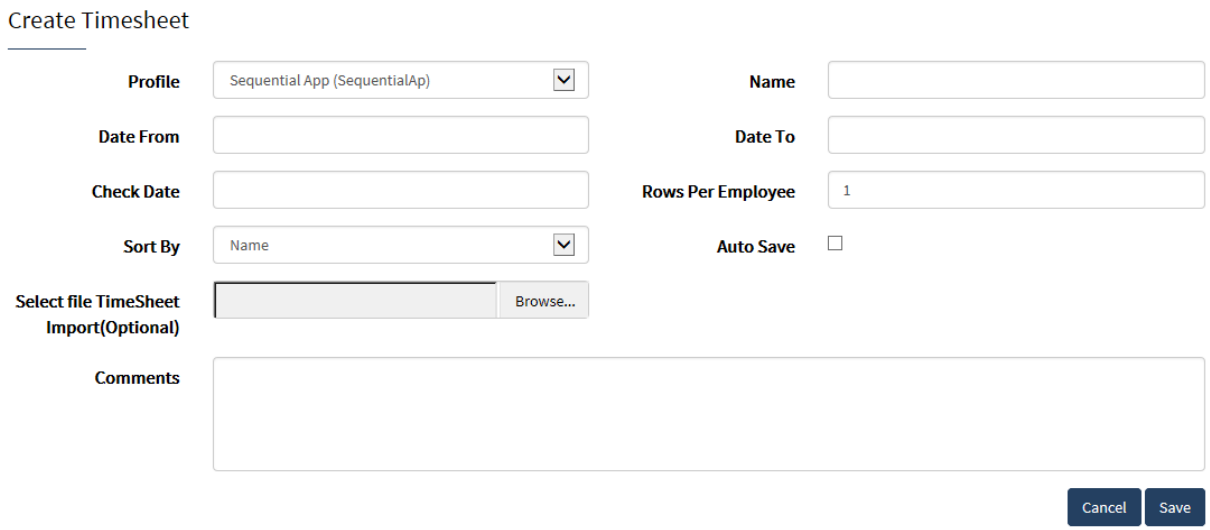
This will allow the user to view punches.

This will allow the user to copy the timesheet.

This will allow the user to delete the timesheet.

Adding New Timesheet

Users can add a new timesheet by clicking on Add new timesheet button. When they click on Add New Timesheet they will see the screen below.



Profile: Users can select a timesheet profile from the list of profiles that have been assigned to the client.

Name: Users can create a name for the timesheet.

Date From: This will populate if timesheet profile is set to increment dates. If not, users will enter the start date of pay period.

Date To: This will populate if timesheet profile is set to increment dates. If not, users will enter the end date of pay period.

Check Date: Check date of payroll

Rows Per Employee: Number of rows on timesheet for each employee

Sort by: Field that timesheet will sort employees by

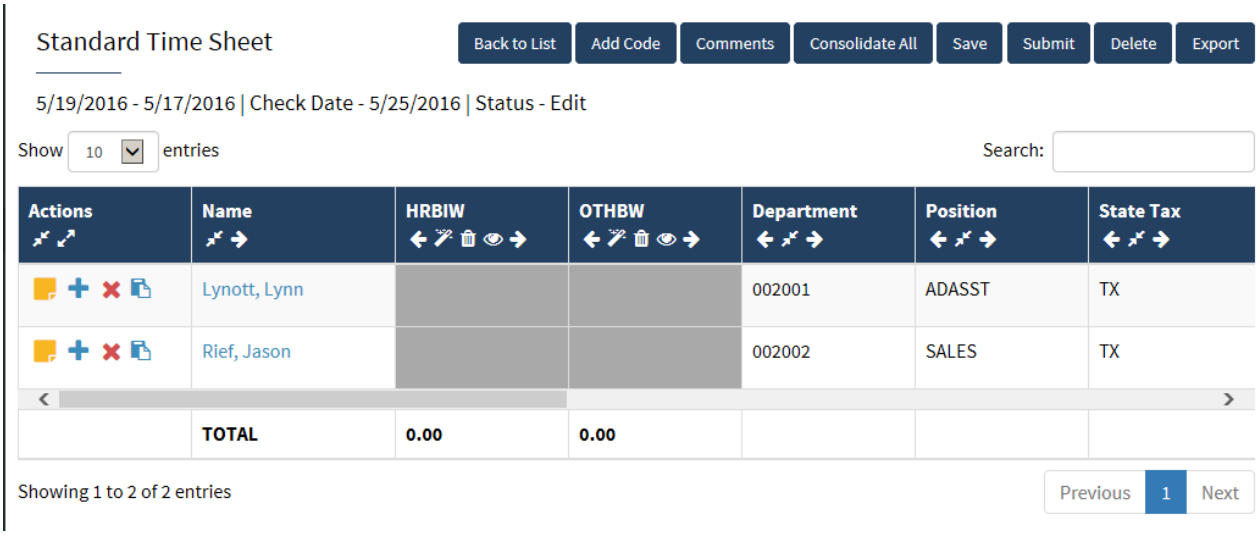
Auto Save: Check if user would like timesheet to auto save.

Select file Timesheet Import:

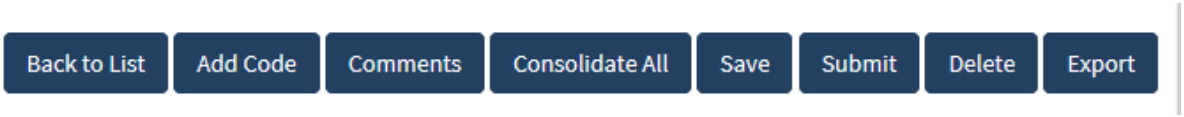
Comments: User can enter comments for PEO to view when they receive the submitted timesheet.

Editing a Timesheet

Edit a Time Sheet by clicking on the edit button on one of the time sheets on the main page. When you do, you will see a screen similar to the one below.

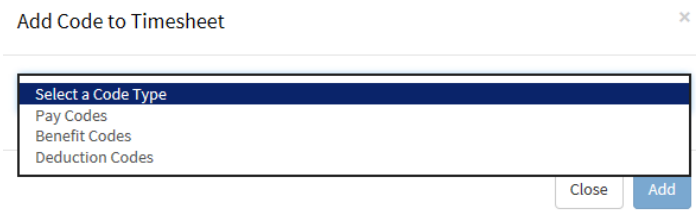


Action buttons on top of timesheet:

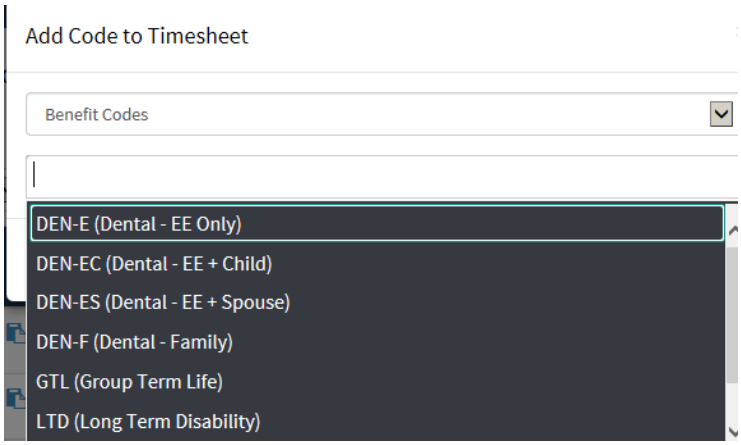


Back to List — Takes user back to list of timesheets available.

Add Code — Allows user to add a pay code, deduction or benefit as a column. See example below



After you select a code type, then you select which one to add in the second drop down box (example below).

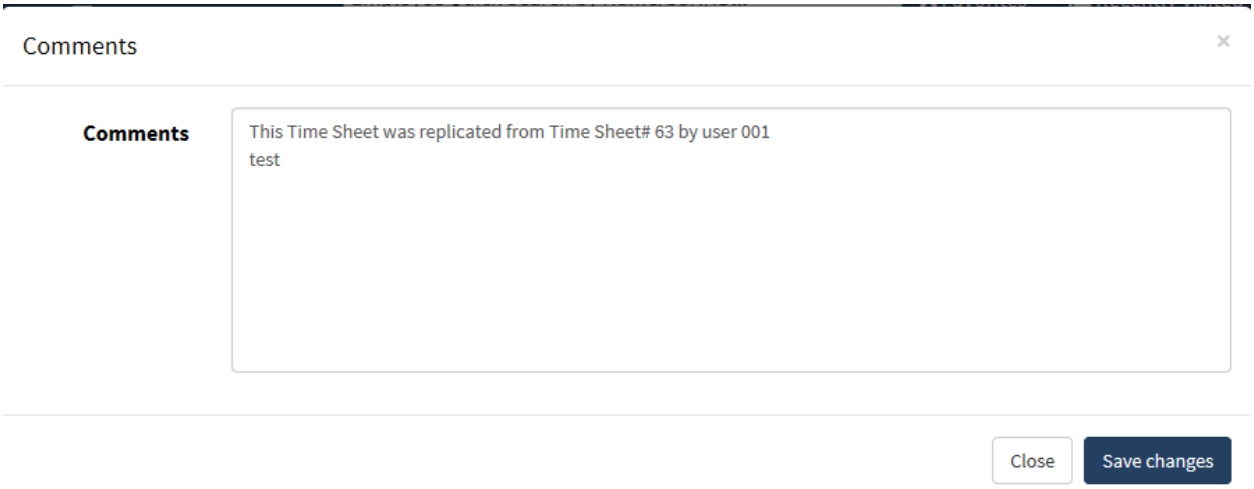


Add Employee

Allows user to add an employee to the timesheet that isn't currently available. To add an employee, this function must be set up on the timesheet profile at the system level.

Comments

Notifies user there is a comment on this timesheet. The exclamation symbol notifies user there is a comment attached.



Consolidate All — Allows user to consolidate all punches, etc to the timesheet.

Save — Allows user to save timesheet.

Approve — This button will only appear if the user has been set up as an approver.

Submit — Allows user to submit the timesheet to either approvers or to PEO

Delete — Allows user to delete the timesheet.

Export — Will export time data for employees to excel format.

Column Headers - Icons

The following icons are available on the column headers to use for editing:

These arrows allow user to “hide or expand” column.

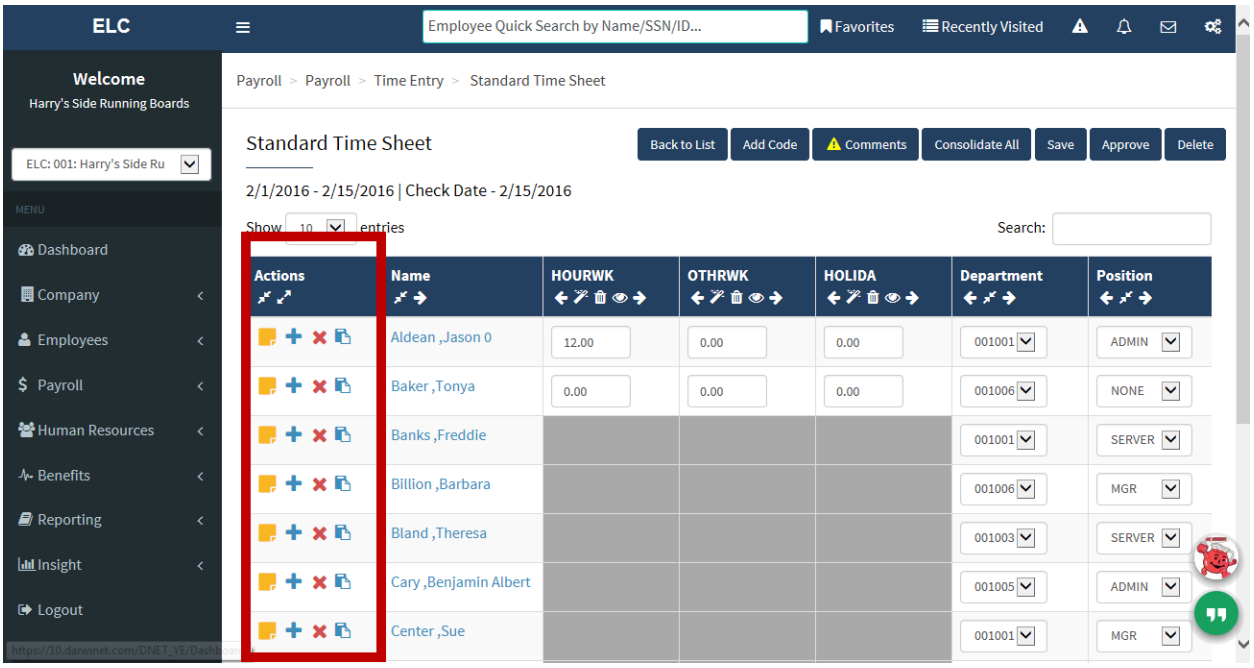
These arrows allow user to move column to right or left.

This icon allows user to fill with default hours. The default hours must be set up on the client timesheet set up (path: Company > Setup > Timesheets)

This garbage can icon allows user to clear the column of all hours.

This eye icon allows user to add a rate column for the column. This rate column appears to the right of the pay code column when you click on the icon.

Icons on left side



A user can add/view an employee note

A user can copy the employee row

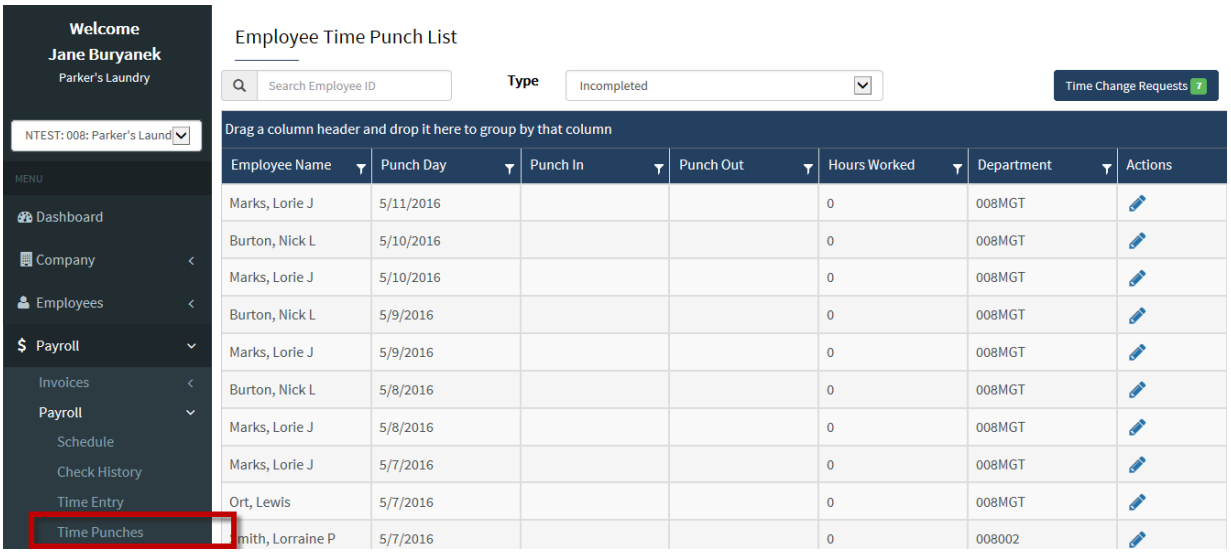
A user can delete an employee row

A user can consolidate an employee's time entry.

Note: The rows on the timesheet will vary depending on how the timesheet profile has been set up for the client.

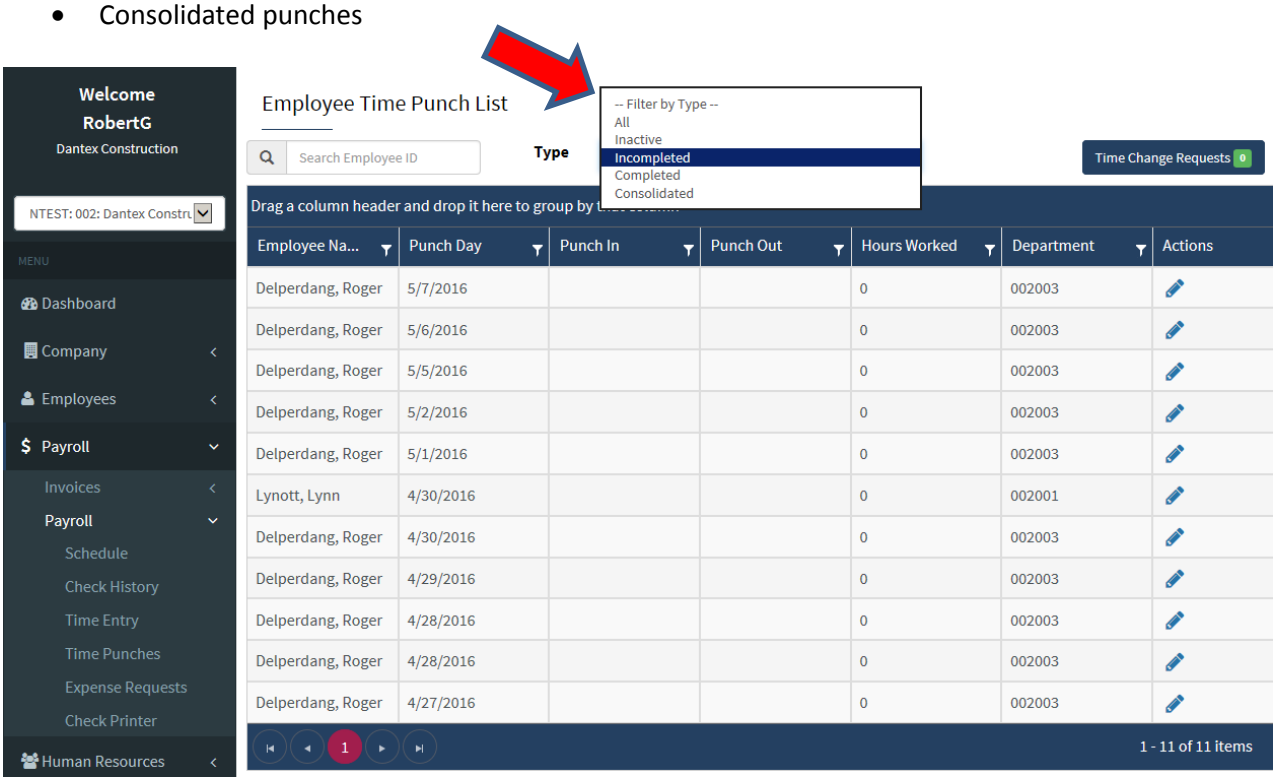
Time Punches

Select *Time Punches* to see the employee's time punch list. See example below.

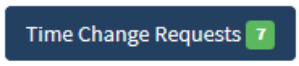


The *Type* drop down box at the top will allow user to select any of these five selections:

- All punches
- Inactive punches
- Complete punches
- Incomplete punches
- Consolidated punches

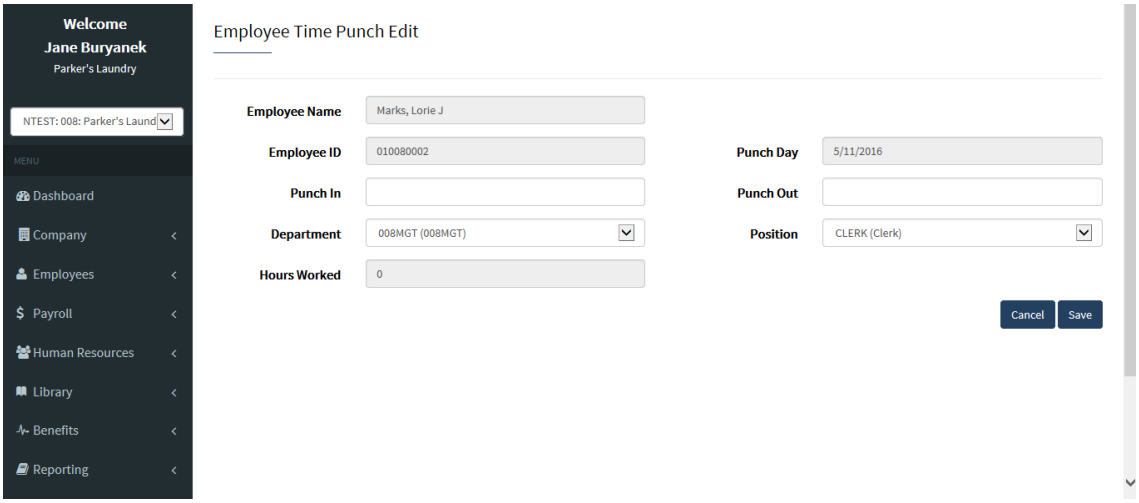


Note: The default for Type is Incomplete punches.



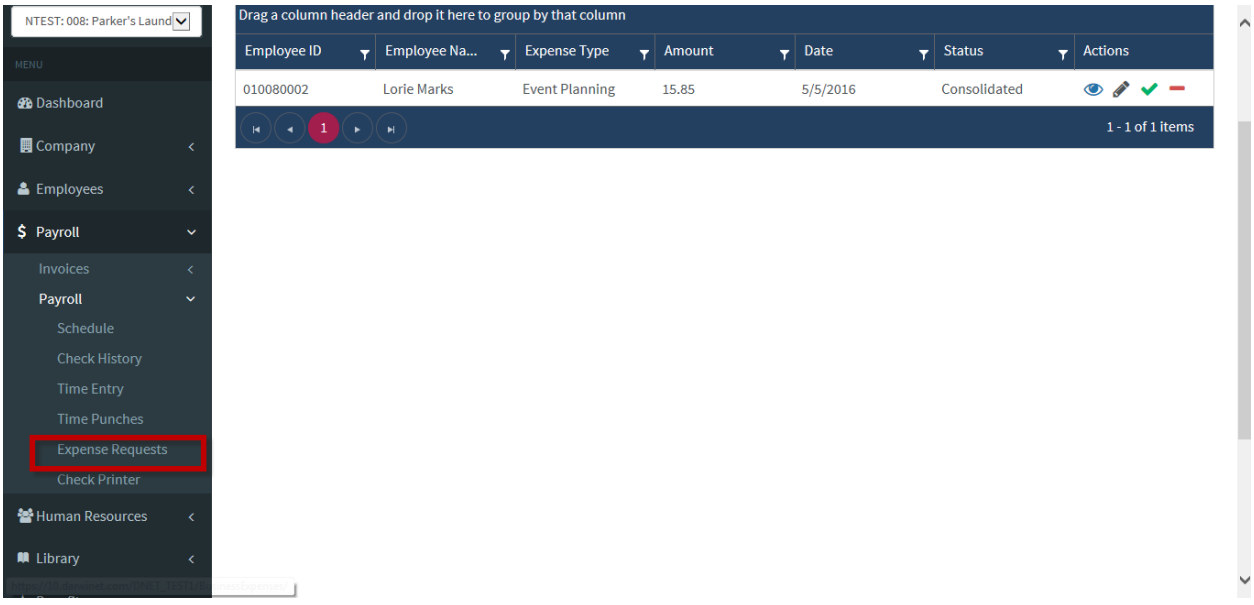
The time change requests in the right top corner show how many requests need approval/denial.

Users can click on the icon in the Actions column to update any punches or add any punches. After clicking this icon, a screen like this will appear:



Payroll: Expense Requests

Select *Expense Requests.* This will show a list of expense requests for the client. Employees must have a business expense pay code assigned to them to enter any expense requests.



Users can use action items on request:

View attachments

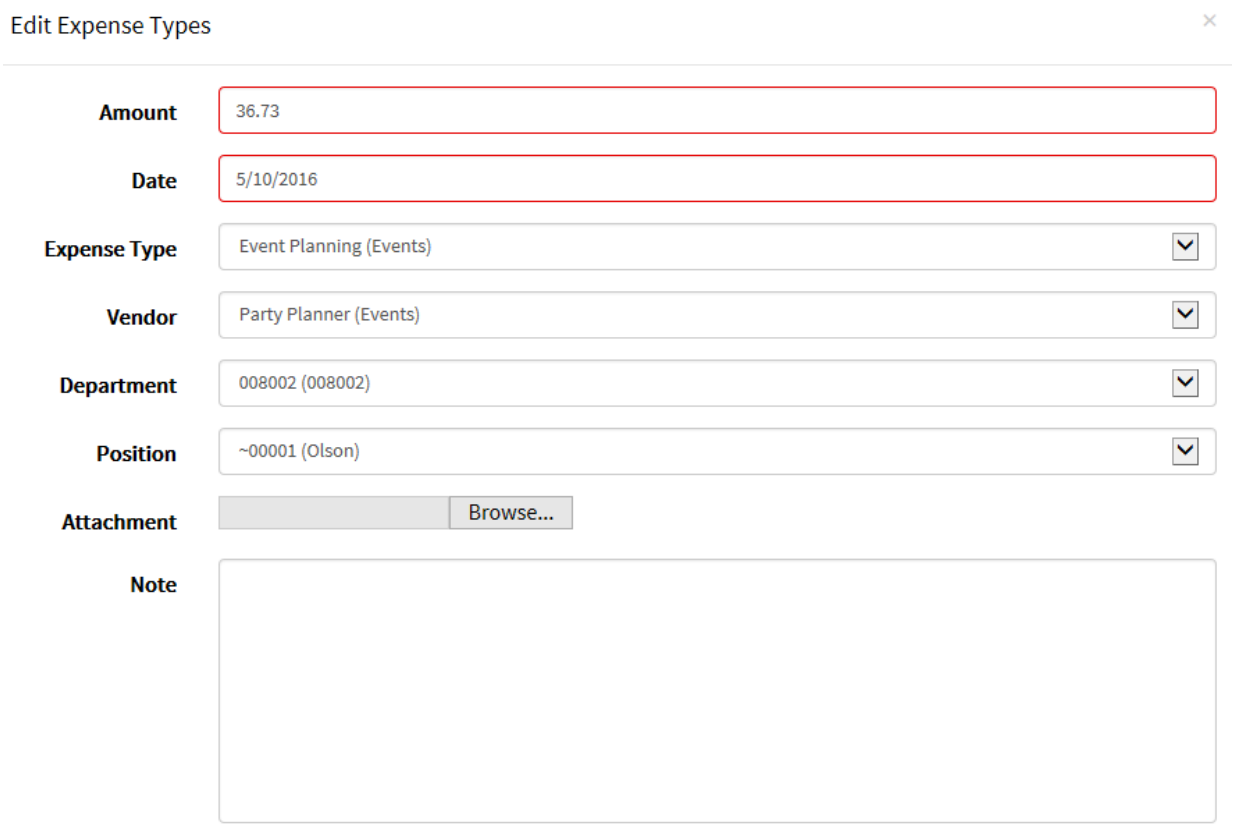
Cannot edit- this is because the timesheet with this expense has been consolidated (notice black icon).

Edit (notice blue icon)

Approve request

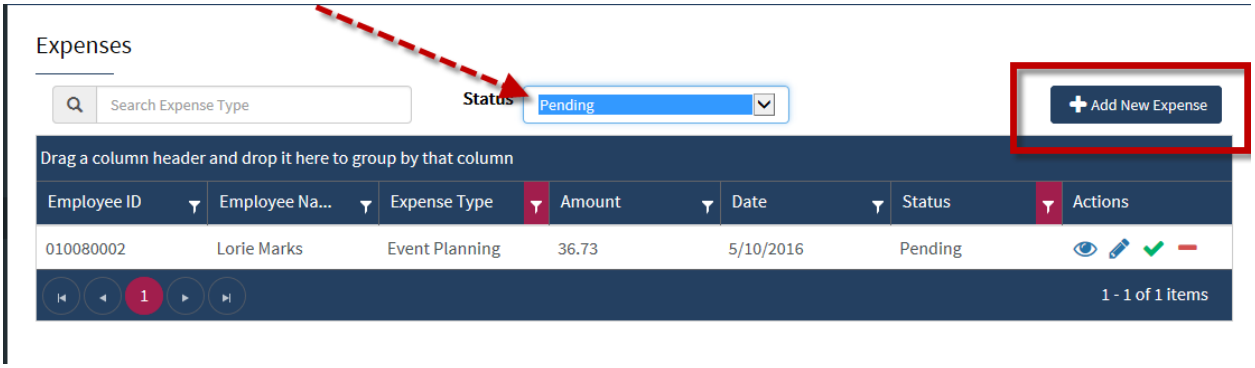
Deny request

If user is editing, the request form will appear to edit:



Requests can be filtered by status. Available statuses are No filter, Accepted, Denied, and Pending. See arrow in diagram below.

Users can also add new expense request which produces request form like above to complete. See Add New Expense button in the graphic below (in red box).



Payroll: Check Printer

Human Resources

Path: Human Resources

Listed in this section is information on paid time off (PTO), training, reviews, licenses, I-9 documents, and leave of absence.

PTO

Click on the PTO heading (Human Resources > PTO) and you will see the categories of paid time off (see screen below). This menu is for viewing the PTO requests and other PTO information for all employees.

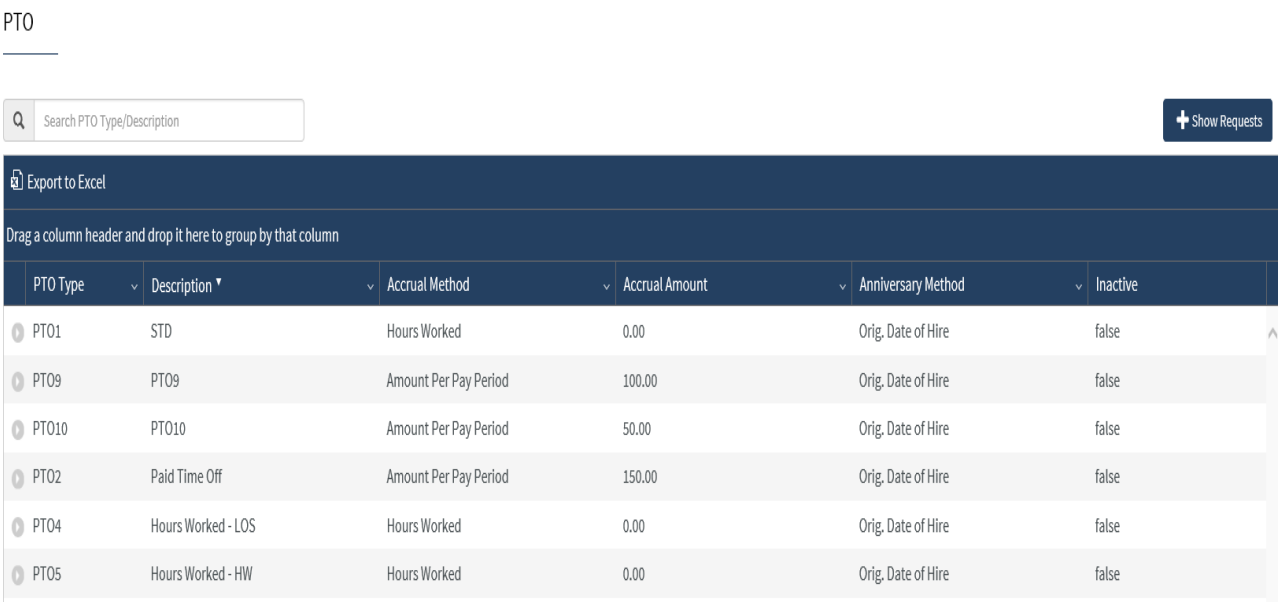
The PTO type, description, method for accruing time, the amount accrued, the anniversary method used, and whether PTO is active or inactive are listed for each category.

Note: The scroll bar is at the bottom of this screen if you need to scroll to view the columns to the right.

Note: In the inactive field, if the value is false, the PTO type is active. If the value is true, the PTO type is inactive.

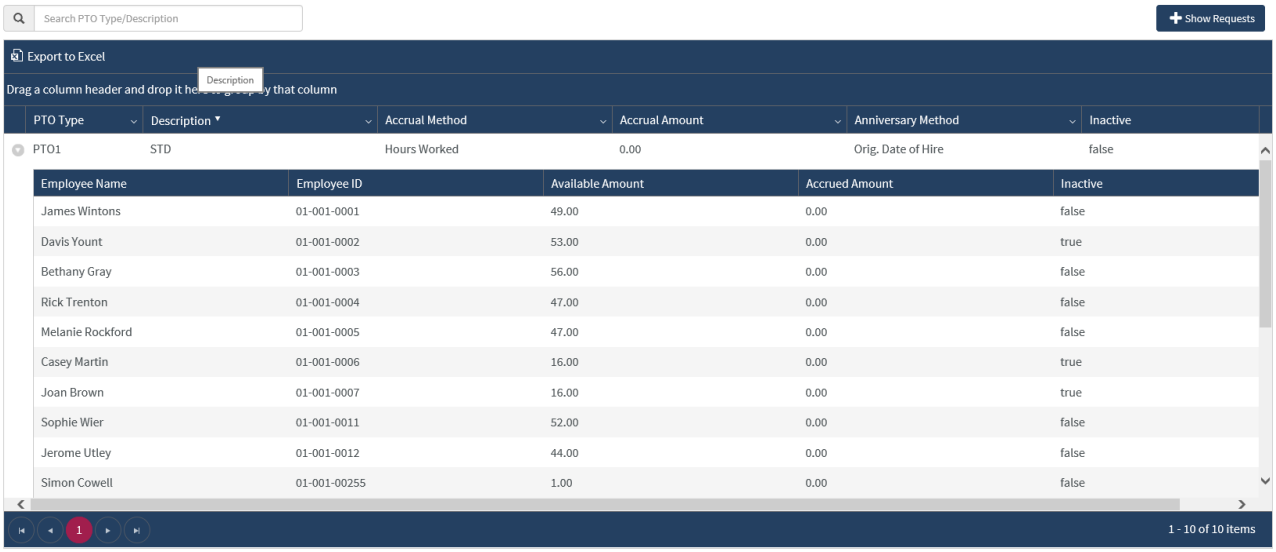
Note: PTO categories are created in your Darwin software application. To make any changes to the category, go to the PTO menu for this client in your Darwin software application. You cannot add, delete, or make changes to PTO categories in this DNet application.

Note: The PTO request is approved by a manager by clicking on the "Show Requests" button (see this button on the screen shot below). This will show requests pending, allow for editing, approving, denying, or deleting the PTO request.



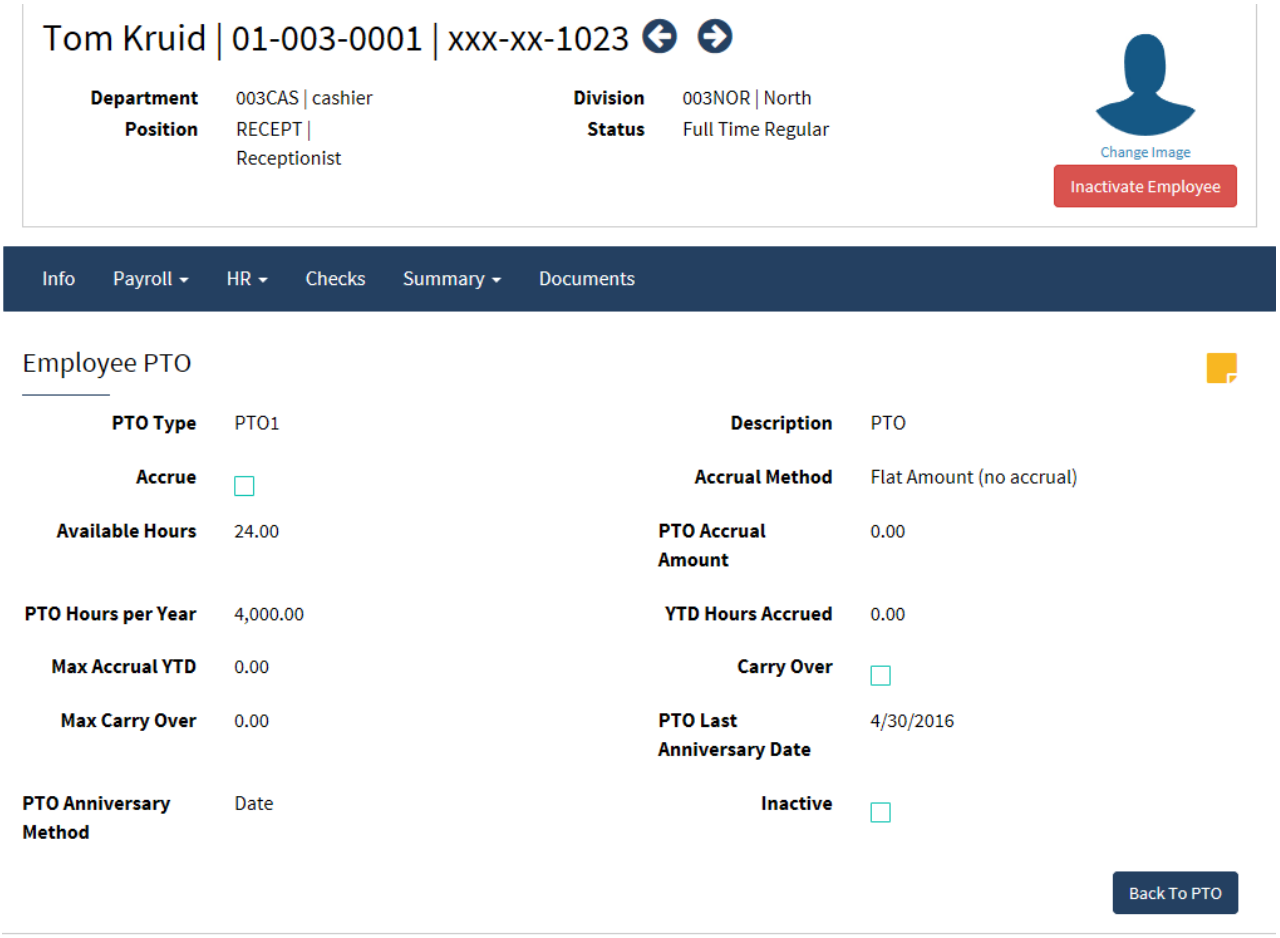
When you click on the arrow to the left of the category (e.g. PTO1) you will see the expanded view. This view (example below) lists employees (and their Employee ID), their available paid time off, their accrued amount, and whether PTO is active or inactive for them.

PTO

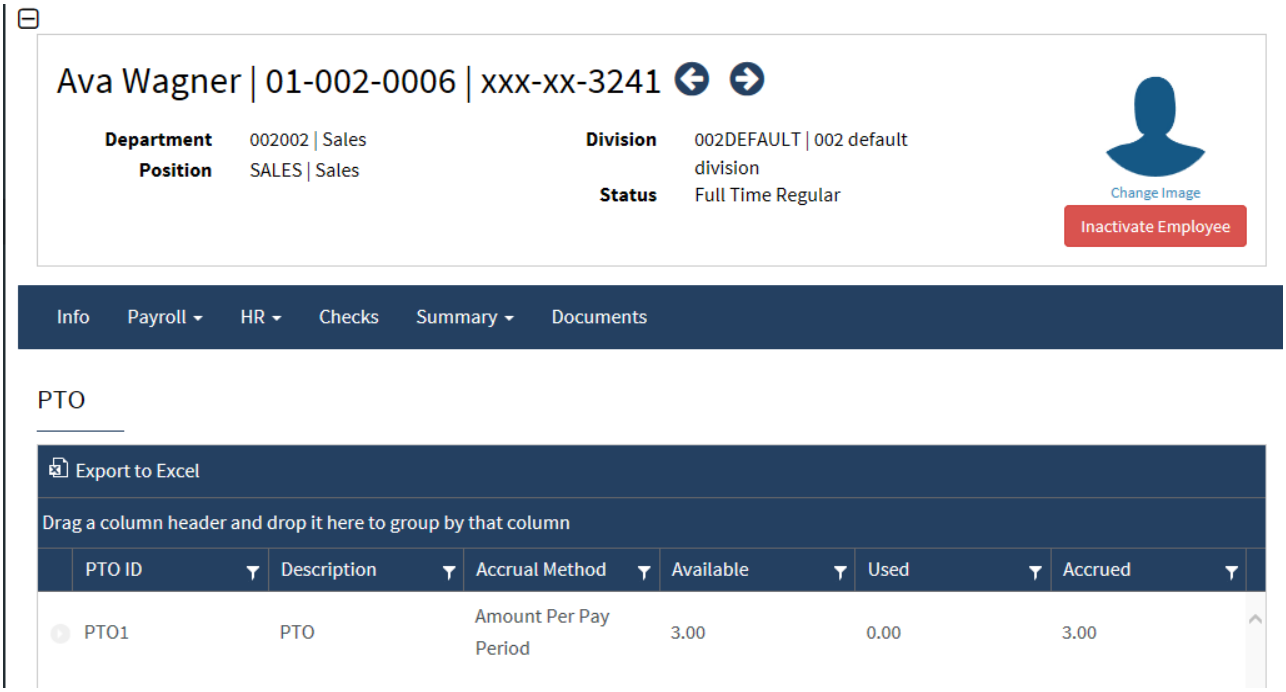


When you click on an employee's name in the field (see graphic above), the line turns a different color momentarily. Then you will see a screen with details for that employee for that PTO Type (e.g. PTO1). See sample below.

Note: The figures (Available hours, PTO accrual amount, PTO hours per Year, Max Accrual YTD, and Max Carry Over) are related to this particular category / type and not your total PTO hours.

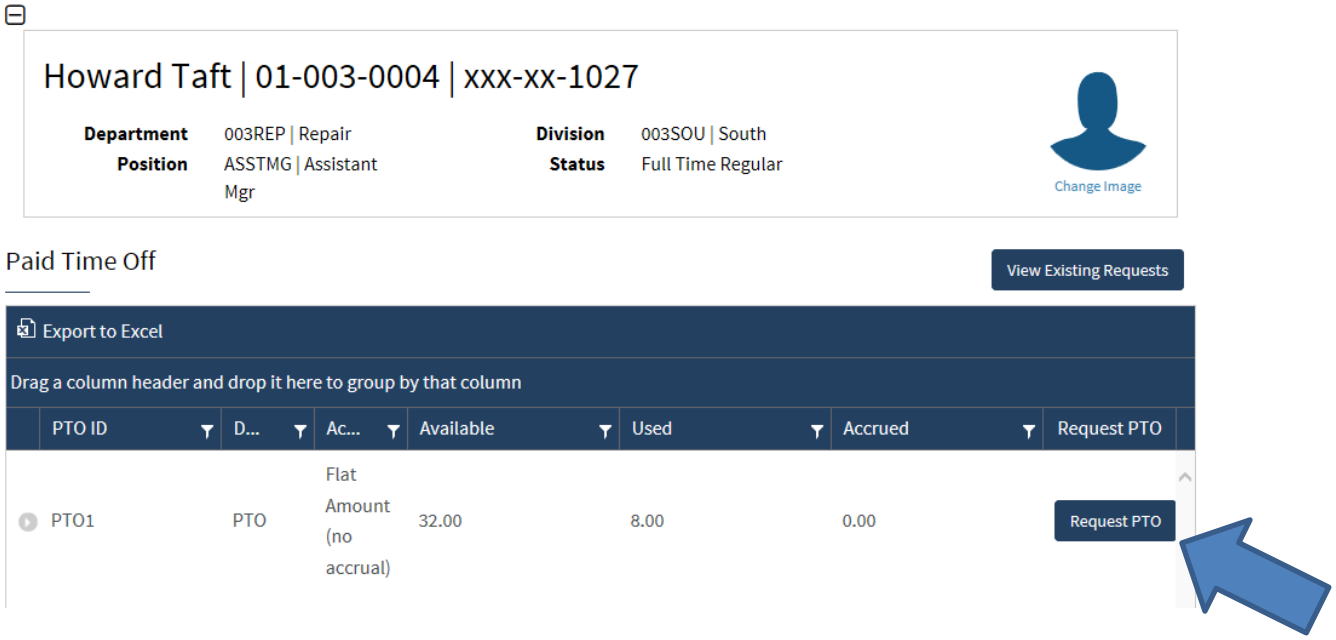


Note: The details for all PTO categories for each employee (e.g. paid vacation time used, sick pay used) are in their individual documents (Employees > List > click on employee name > HR > PTO). See screen shot below of the screen that will be presented to you of all the PTO details for an employee.



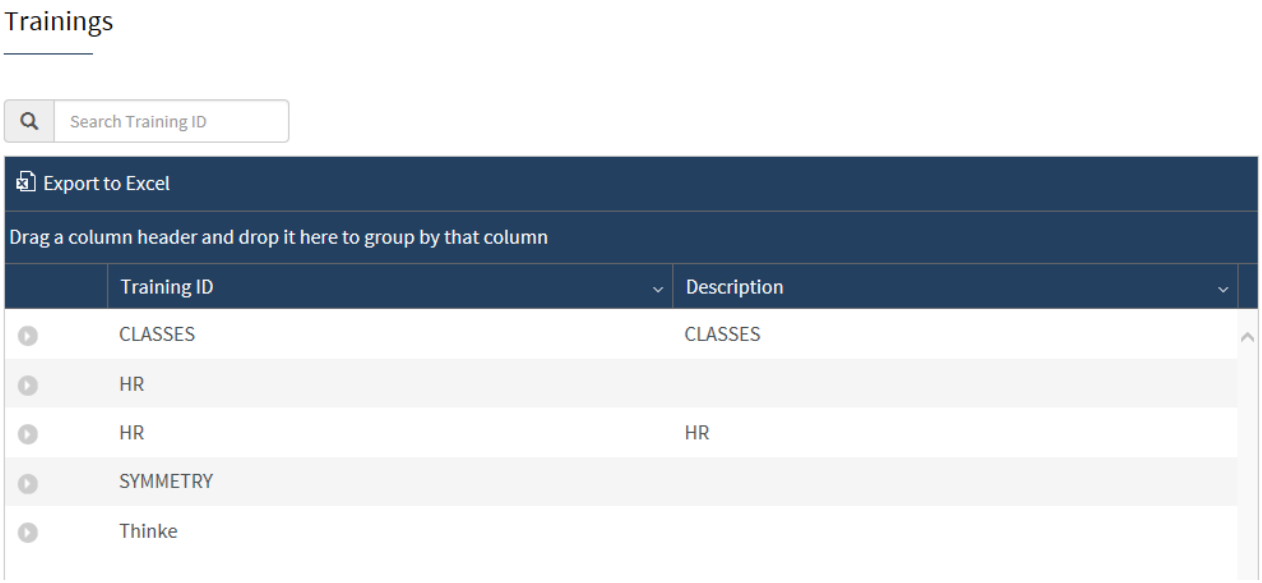
Note: In this view above, the values in the fields (in the respective column) apply to that specific PTO Type / Plan. For example, if an employee has accrued 10 hours of vacation time, the PTO Accrued amount is 10 - even if they have accrued 16 hour of sick time using PTO. Sick time would show up on a separate line as 16 hours of accrued sick time.

Note: Paid time off is requested by the employee in their employee document (path: Human Resources > PTO - by clicking the "Request PTO" button). See screen shot below.



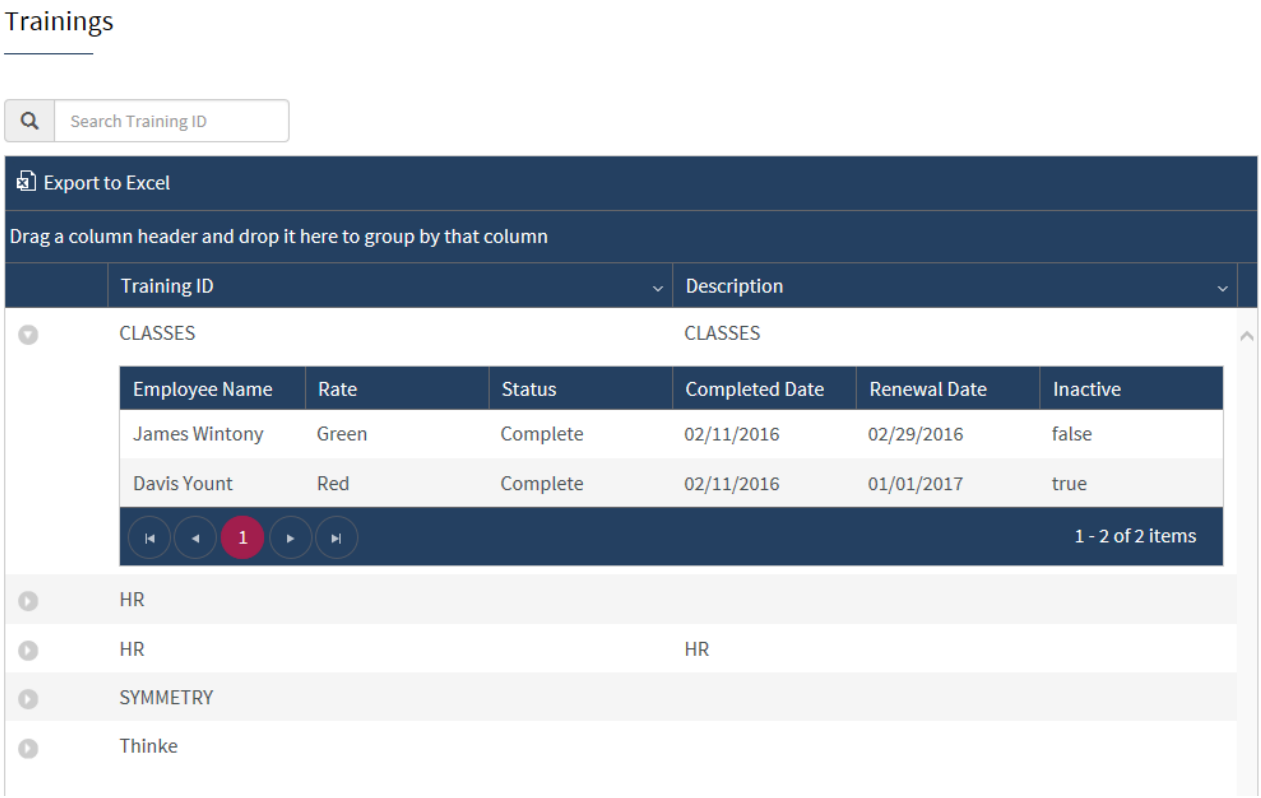
Training

In this view (Human Resources > Training – see screen shot below), you will see the training programs and a description of the training.

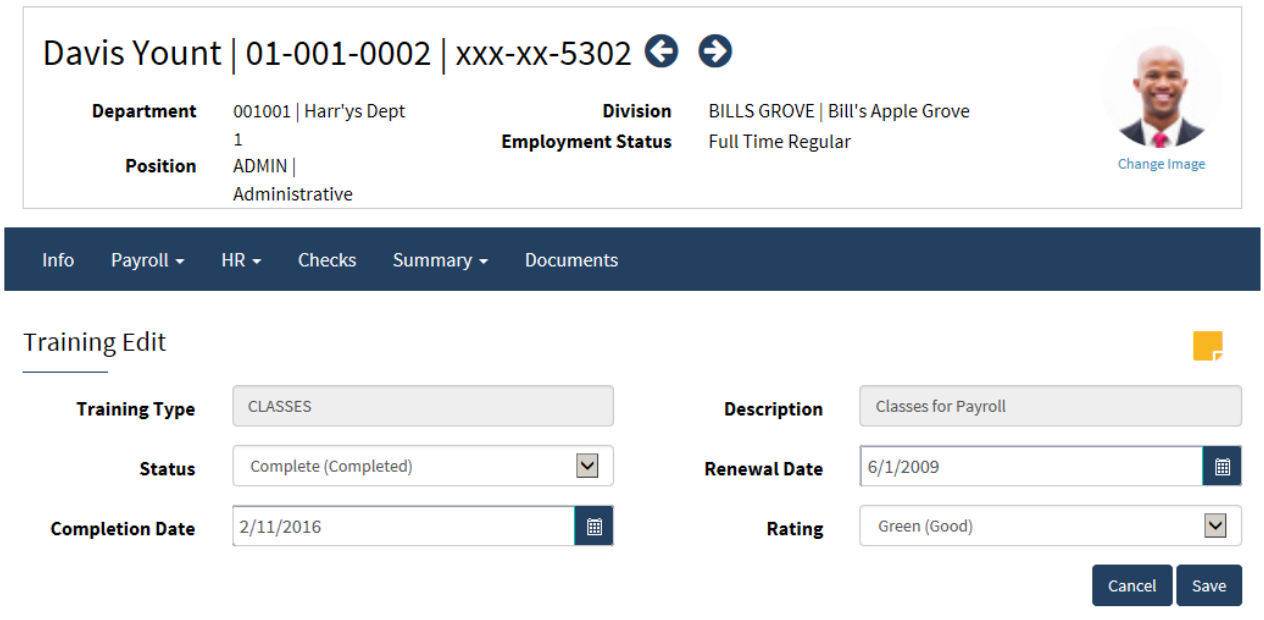


When you click on the arrow to the left of the category (e.g. Classes) you will see the expanded view. This view (example below) lists employees and relevant training information for the employee.

Note: In the inactive field, if the value is “false”, that employee’s training in this category is active. If the value is “true”, that employee’s training in this category is inactive.



If you click on a person's name in the view above (e.g. click on Davis Yount) the line turns a different color momentarily, then you will get a screen with more detail on this training for this person (see sample below). In this screen you can update the training status, renewal date, completion date, rating and comments.



Note: If you click on save in this document, you will see a complete list of training programs for that employee. This is the screen in which an employee can add a training program for themselves. This screen is also accessed from the employee's view (My Info > Info > HR column > Training).

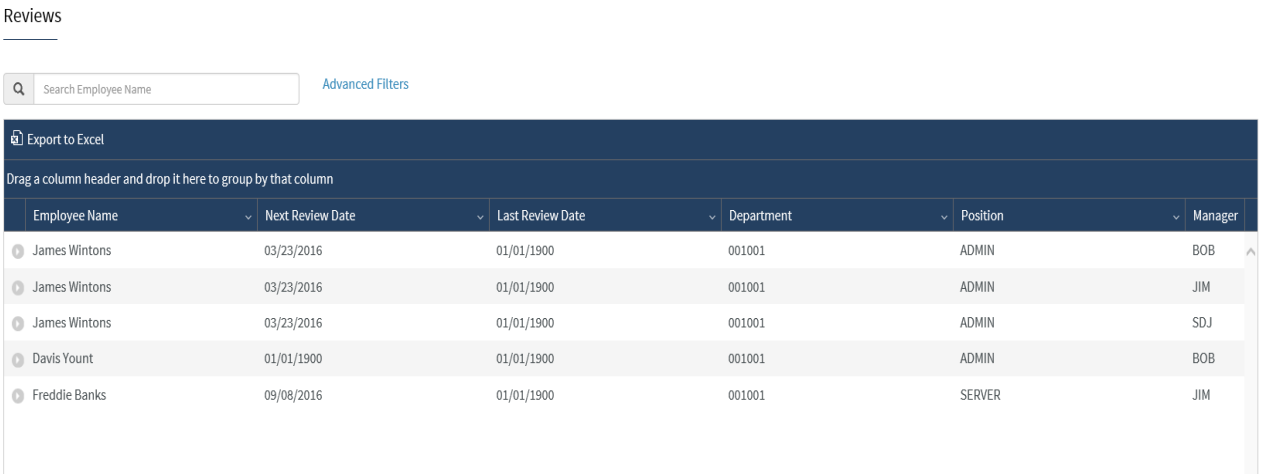
Note: The training program categories are set up by you as the client user in the Company > SetUp > HR > Training tab.

Note: The employee's complete the information for training classes in their document (My Info > Info > HR column > Training).

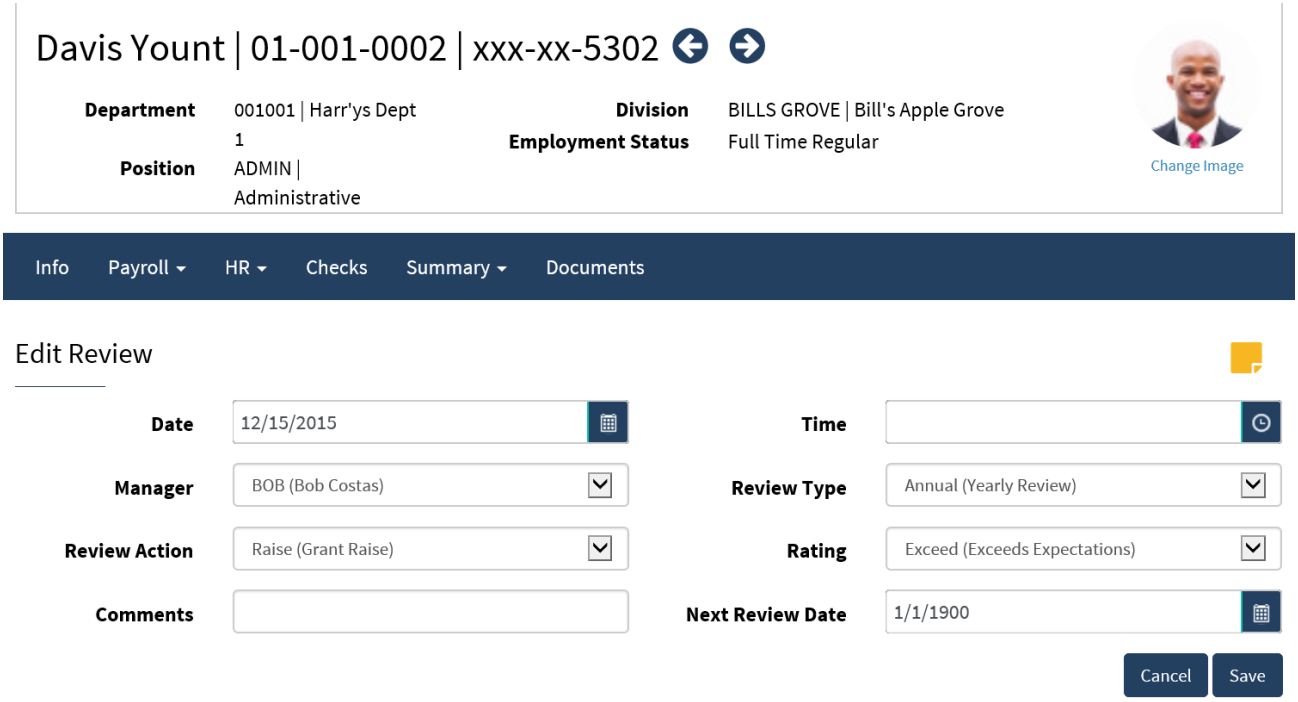
Reviews

This view lists the performance reviews provided for employees. As with the previous documents, the review categories are created in the employees menu when logged into this company view (Employees > List > click on employee name > HR > Reviews). Also, as with the previous views, click on the arrow to the left of the employee's name to be presented with additional information for reviews for that individual.

Note: In the inactive field (not visible on screen shot below - it is the last column on the right that you can see by scrolling to view that column), if the value is "false", that employee's review is active. If the value is "true", that employee's training in this category is inactive.



When you click on the arrow next to an employee's name and click on the date (under Review Date) in the field below the employee's name, the line turns a different color momentarily, and then a new screen is presented. It provides more information (see example below) and the ability to edit the review.

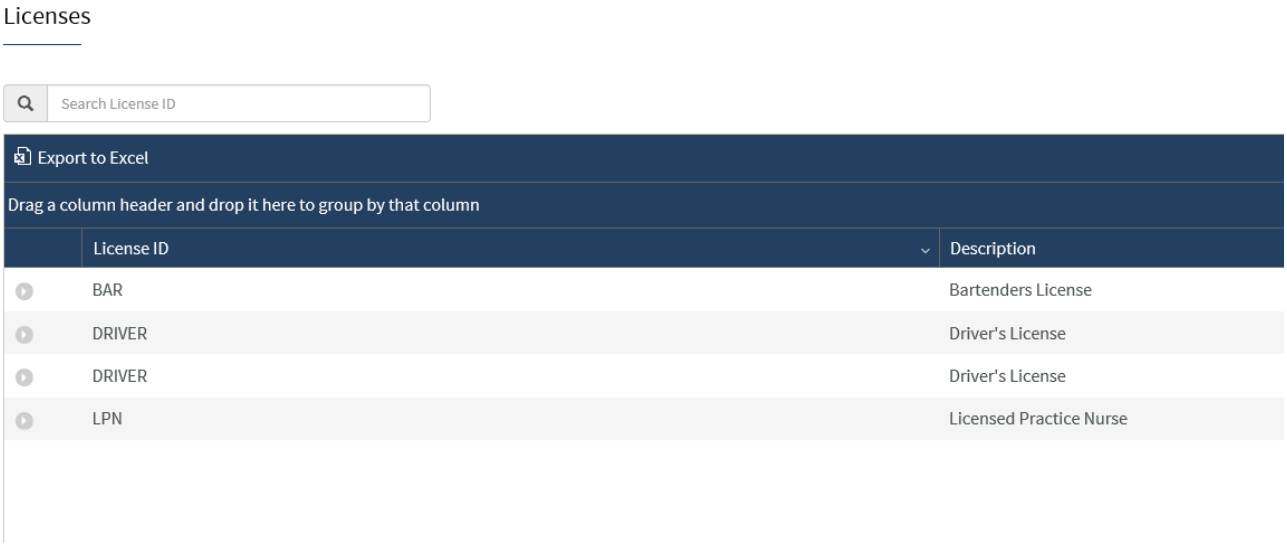


Note: Review categories (Review Type, Review Action, and Rating) are set up in the Company > SetUp > HR tab.

Note: Reviews for an employee are created in the Employees Menu (Employees > List > click on employee name > HR > Reviews)

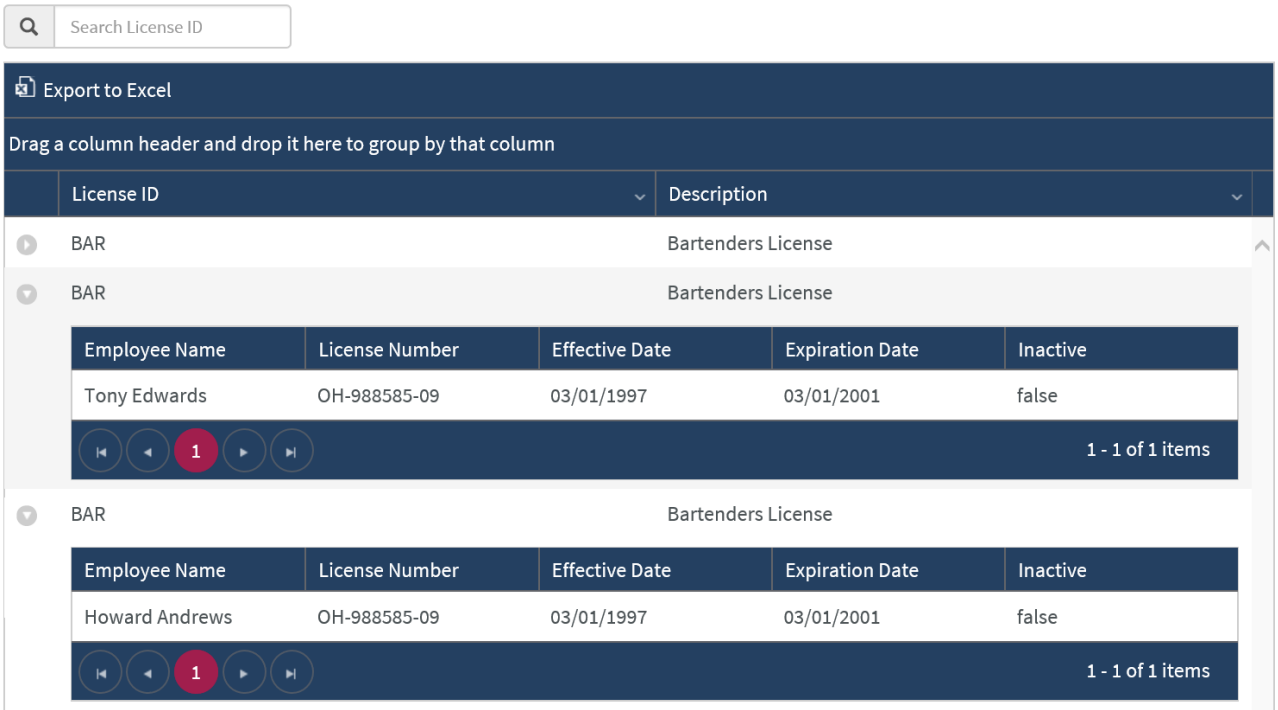
Licenses

Listed in this view are licenses employees have achieved and relevant information about licenses and certifications.

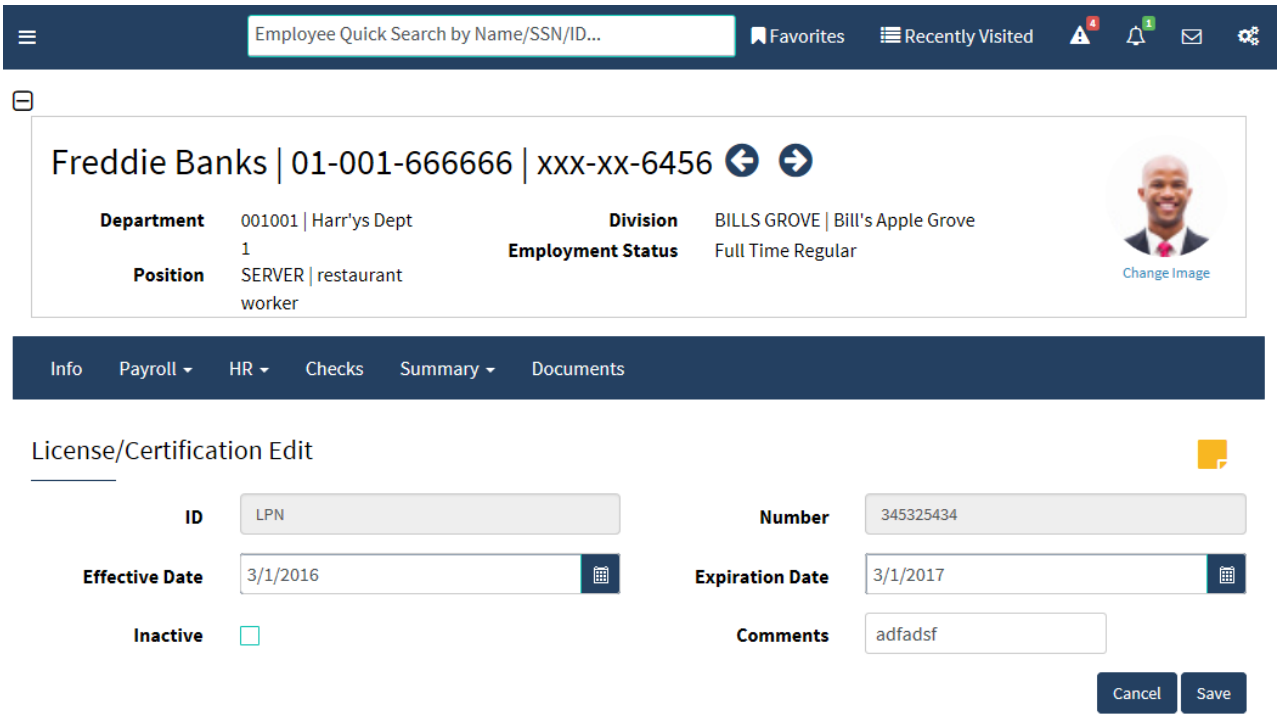


When you click on the arrow to the left of the category (e.g. Driver) you will see the expanded view. This view (example below) lists employees and relevant license information for the employee (employee, license number, effective date, expiration date, and whether the license if active / valid).

Note: For the inactive field, false means the license is active. True means the license is not active.



If you click on a person's name in the view above, the line turns a different color momentarily, and then you will get a screen with more detail on the selected license for this employee (see sample below). You can update the license information here. This same screen can also be accessed from the Employees menu (Employees > List > click on employee name > HR > Licenses / Certifications > click on name of license).



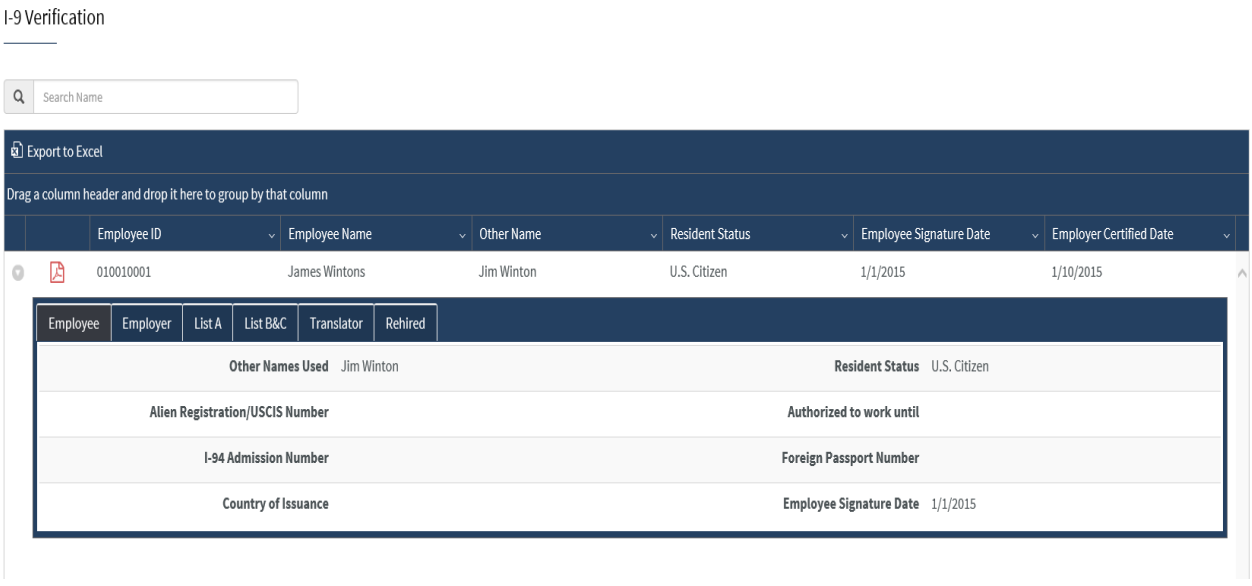
Note: These licenses are created in the employee's document using the Add License / Certification button (Employees > List > click on employee name > HR > Licenses).

I-9

Listed in this view is I-9 information for employees (screen shot below)

Note: This I-9 information is created by the employee and their manager using / during the on-boarding process. The information you see here in the I-9 screens has been imported from the forms completed by the employee and manager during the on-boarding process. You are not able to edit the data in these fields.

In the expanded screen you get when you click on the arrow to the left of the attachment icon (see sample below), you can click on the labels (Employee, Employer, List A, List B & C, Translator, and Rehired) for additional information.



When you click on the .pdf icon (left of the Employee ID), the employee's I-9 form will be presented. When you hover over the .pdf icon, it will note to click the icon to "View I-9".

Below is more information on the data in each of the areas.

Employee area:

Other Names Used	All other names used (including maiden name)
Resident Status	Country in which employee has resident status
Alien Registration / USCIS Number	Number assigned to a noncitizen at the time A-file is created
Authorized to work until	If Alien is authorized to work in U.S. this is the date their employment authorization expires. If employment authorization does not expire (e.g. refugees, asylees), "N/A" should appear in this field.
I-94 Admission Number	Employee's A-Number / USCIS number
Foreign Passport Number	Number on the foreign passport
Country of Issuance	Note of the country that issued the passport
Employee Signature Date	Date employee signed the I-9 form

Employer area:

Employee Signature Date	Date employee signed I-9 form
Title of Employer	Title of employee's manager
Employer's Last Name	Employee's manager's last name
Employer's First Name	Employee's manager's first name
Employer Certified Date	Date employer certified employee's I-9 information
Employer Certified from IP	IP address of the computer used by employer to certify employee

List A, B & C:

Document Type	Type of verification document presented by employee (e.g. U.S. Passport, Permanent Resident Card, Driver's license, Social Security card)
Document Title	Notes what document was used for verification
Issuing Authority	Lists the organization that authorized the verification document
Number	Identifying number on the verification document
Expiration Date	Date that the verification document expires (N/A if none)

Translator

Use of Preparer or Translator	"True" means employee used a translator

Preparer: Last Name, First Name Street Address, Apt. Number City, State, Zip	Name and address information for preparer or translator

Rehired

This field contains the information for when a former employee is hired again.

EE Signature Date	Date employee signed I-9 form
Date of Rehire	First day employee restarts work
Employer Certified Date	Date employee's manager's verified identification
Rehire: Document Type	Type of verification document presented by employee (e.g. U.S. Passport, Permanent Resident Card, Driver's license, Social Security card)
Employer Certified from IP	IP address of the computer used by employer to certify employee
Rehire: Document Title	Notes what document was used for verification
Employee New Last Name	New last name if it has changed since last time of employment
Rehire: Document Number	Identifying number on the verification document
Employee New First Name	New first name if it has changed since last time of employment
Rehire: Document Expiration Date	Date that the verification document expires (N/A if none)
Employee New Middle Name	New middle name if it has changed since last time of employment
Rehire: Employer Name	Name of manager who verified this rehired employee

FMLA / LOA

Leave of Absence

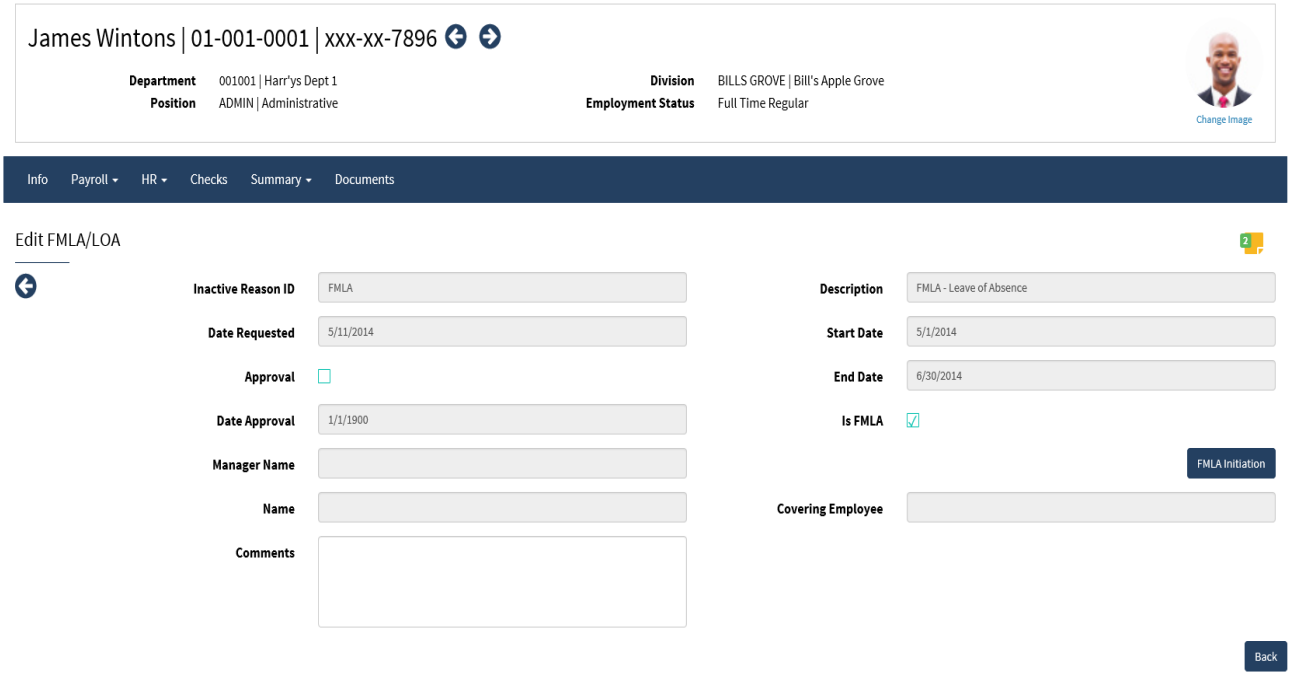
This view shows information about leave of absences for Family and Medical Leave Act or other leaves of absence. The information in the fields in each column originates from your Darwin software (when a LOA /FMLA forms are completed by the employee and manager).

Note: In the FMLA column in the main FMLA / LOA screen (see example below), “true” means that this leave of absence was under the FMLA regulations. “false” means it was not

Note: In the Approved column, “true” means it was approved. “false” means it was not approved.

In clicking on a person’s name in the main screen, the line turns a different color momentarily. Then a new screen with additional details (see example below) appears.

Note: In this screen, the information in the fields also originates from your Darwin software forms. You are not able to edit data on this document. Any changes are made in Darwin software.



Note: The Inactive_Reason_ID is the code and description selected in Darwin software when the employee completes the leave of absence request. One example of a code is FMLA.

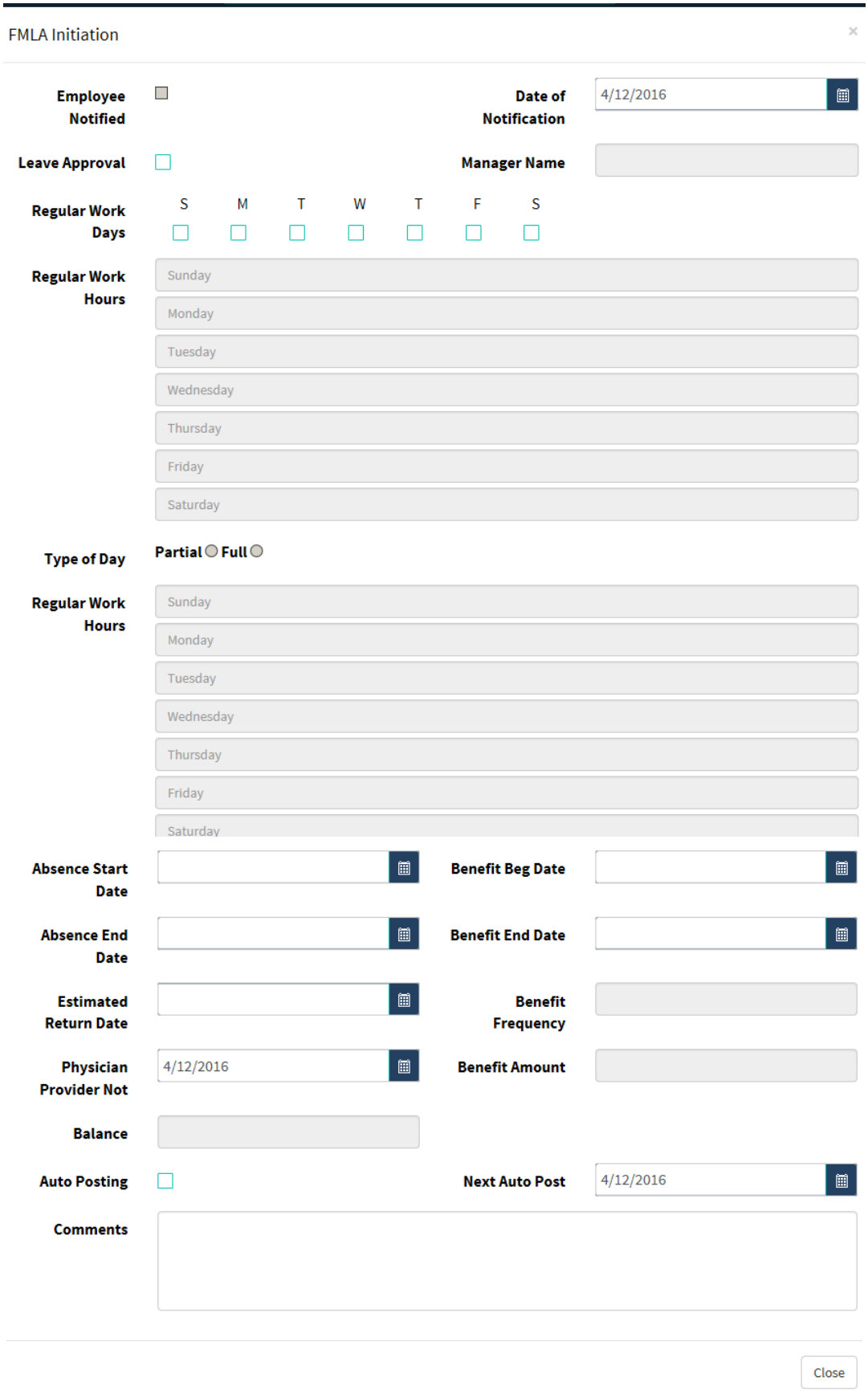
Note: The "Name" field (underneath the "Manager_Name" field) is the name of the employee's manager (who approved the leave of absence).

Note: The covering employee is another co-worker at the organization who will be responsible for the employees work during the employee's leave of absence.

FMLA Initiation

Access the "FMLA Initiation" window through the FMLA/Initiation button after marking the FMLA checkbox. When you click on the FMLA Initiation, you will be presented with a screen similar to the one below.

This form is populated from the information imported from Darwin. You are not able to edit data in the fields on this form. You will need to make changes in the form in Darwin. This form is for information purposes – to allow you to view the leave of absence information in DNet.


FMLA Initiation
Employee Notified
Date of Notification
4/12/2016
Leave Approval
Manager Name
Regular Work Days
S M T W T F S
Regular Work Hours
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Type of Day
Partial Full
Regular Work Hours
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Absence Start Date
Benefit Beg Date
Absence End Date
Benefit End Date
Estimated Return Date
Benefit Frequency
Physician Provider Not
4/12/2016
Benefit Amount
Balance
Auto Posting
Next Auto Post
4/12/2016
Comments
Close

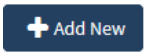
Employee Notified	A check notes that the employee was notified of approval of their leave of absence request
Date of Notification	The date the employee was notified of their FMLA event
Leave Approval	If checked, this notes that the manger approved the leave of absence
Manager Name	Name of manager who approved the leave of absence
Regular Work Days	Notes the days the employee normally works
Regular Work Hours	Notes the hours the employee normally works.
Type of Days	Indicates whether the employee is taking full or partial days off. If Partial, the corresponding number of work hours per partial day spent on FMLA leave are indicated in the "Regular Work Hours" fields below it.
Absence Start/ End Date	Indicate the FMLA event's starting and ending date.
Benefit Begin / End Date	Dates for premiums that are owed by the employee while on FMLA leave.
Estimated Return Date	Indicates the date the employee intends to return to regular work.
Benefit Frequency	Indicate the frequency with which the employee needs to make payments while on FMLA leave.
Physician/Provider Notified	Indicates the date on which the physician or healthcare provider was notified of the employee's FMLA event.
Benefit Amount	The amount of each payment for which the employee will be responsible while on FMLA leave.
Balance	Displays a running balance of the amount owed by the employee while on FMLA leave, compared to the amounts paid.
Auto Posting	When this checkbox is marked, this indicates the Next Auto Post field is active.
Next Auto Post	Displays the date on which the next payment is due.
Comments	Describe the event and surrounding circumstances.

Library

This menu provides ready access to the documents that are in your DNet application. The purpose of the repository is to give you as the client user a consolidated view of documents that have been uploaded (from the system level and from this client level) and assigned to an employee or created by the employee. This menu eliminates having to go to each individual employee record to see the documents (which has a path of: Employees > List > click on an employee's name > Documents).

Document From > Service Provider to EE

Listed are the documents created at the system user level that are created for employees to view. These documents been uploaded into DarwiNet by the system user.

Note: This DNet application knows the category for the document based on the level of access/screen from which the document was uploaded. If the document is uploaded from the system level, it is a service provider document. If it is uploaded from the Corporate Document page (path: Library > Company > Add New button 

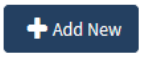
) at the client level, it goes into the Company document category / menu. If it is created via onboarding or uploaded on an employee specific page/record, it will go into either the Employee Document > Attachments or Employee Document > Onboarding folder.

Document From > Service Provider to ME

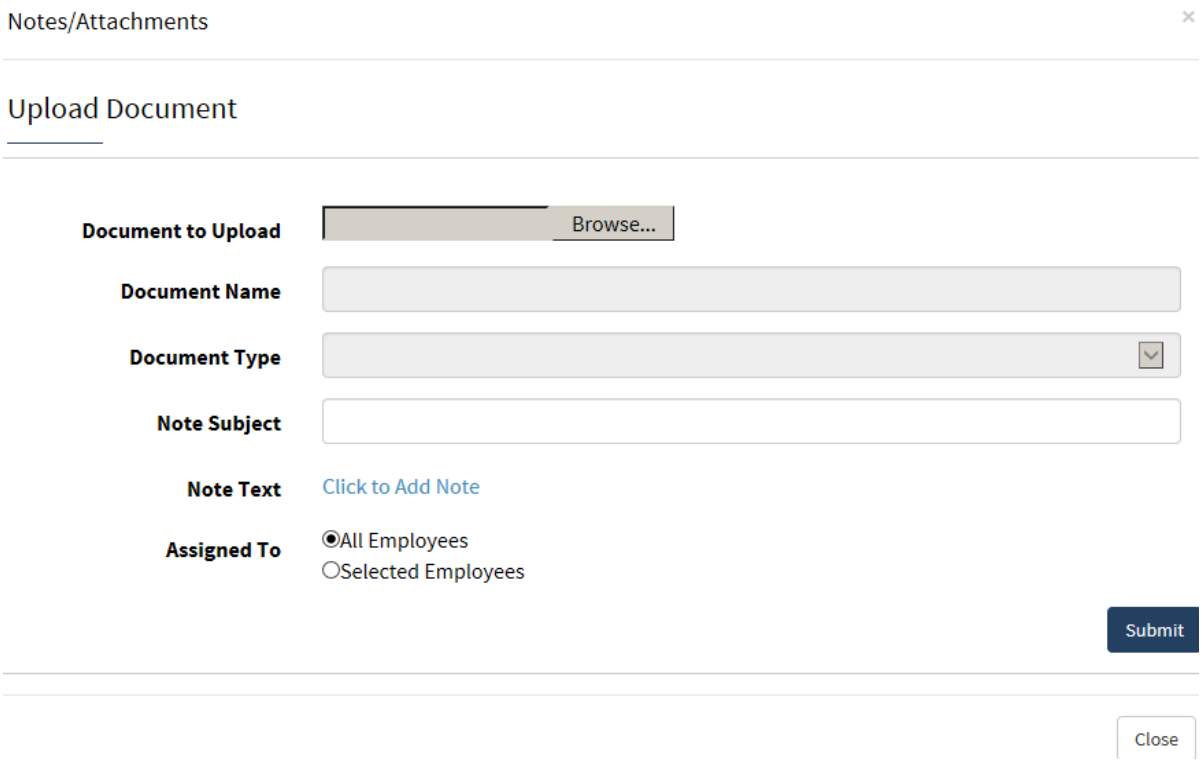
This view contains the documents that have been uploaded into DNet that contain information from your company / employer for you as a client to view. The ME in the title (Service Provider to ME) represents you as a client user.

Document From > Company

Having this separate view may allow for finding a document more readily because you know it is a corporate document for which you are searching (versus a document from a service provider). These are documents that are created by a client user.

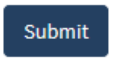
Click the Add New 

button to add a new document. After you click on the Add New Button, you should see a view similar to the one below.



Key Items:

Document to Upload:	Browse to find the document you wish to upload
Document Name:	The document name will be inherited when you upload (keeps the same name as the original file). You can change the name that is listed after uploading the document.
Document Type:	This is the document type (see information on document types in this section).
Note Subject & Note Text:	Use these fields to add a subject and text for a note this document if you so choose
Assigned To:	Select *All Employees* or *Selected Employees* to determine who will have access to this document. If you choose *Selected Employees,* you can choose which employees from the list will be able to view the document.

Click the *Submit* button 

to save this document or the *Close*

button if you do not wish to save this downloaded document.

Employee Documents > Attachments

This menu contains a list of all the attachments that are in the employee's documents. Having this menu can save time if you know you are looking for an attachment (but may not remember to which employee the attachment is associated).

Employee Documents > Onboarding

This view contains the onboarding documents completed during the onboarding process.

Benefits

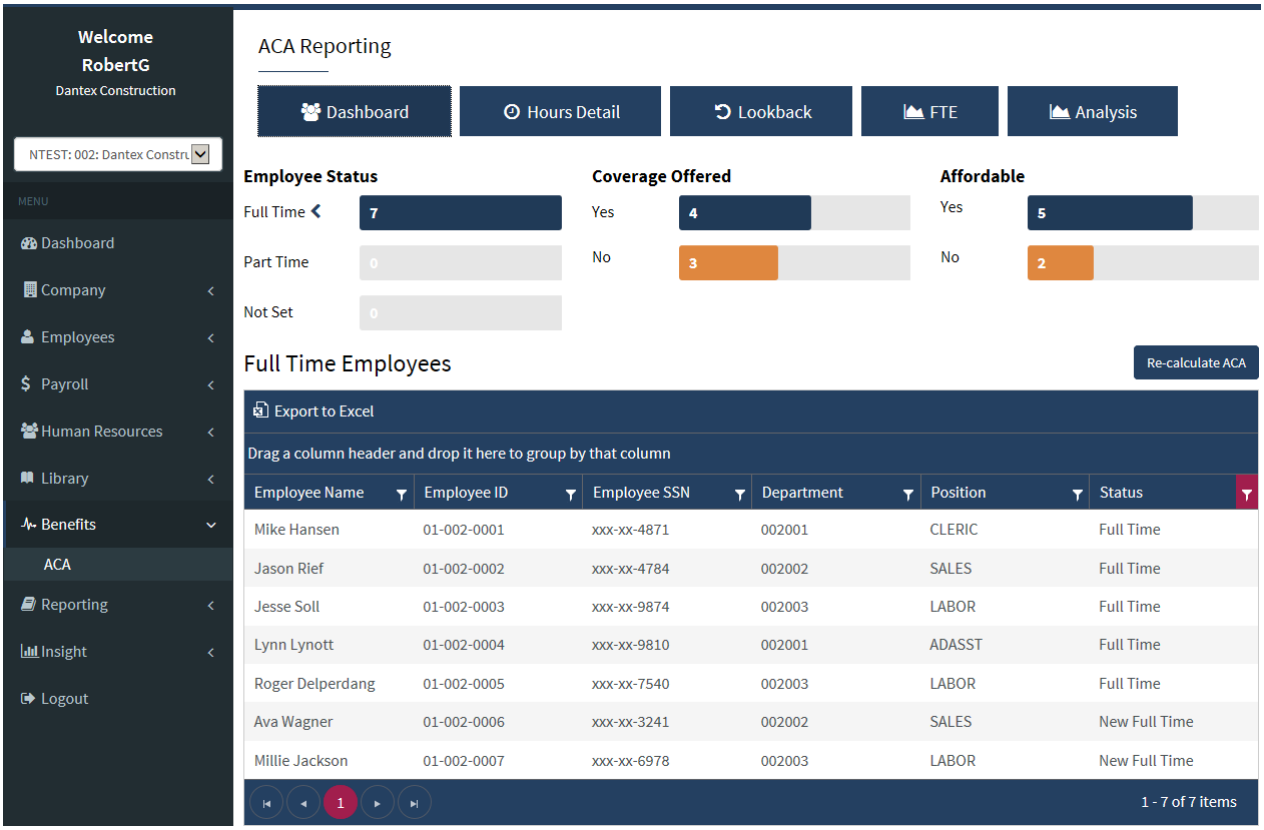
This menu provides access to information on Affordability Care Act data for your organization. There are five screens. They are Dashboard, Hours Detail, Lookback, Full Time Equivalent (FTE), and Analysis.

ACA

Dashboard

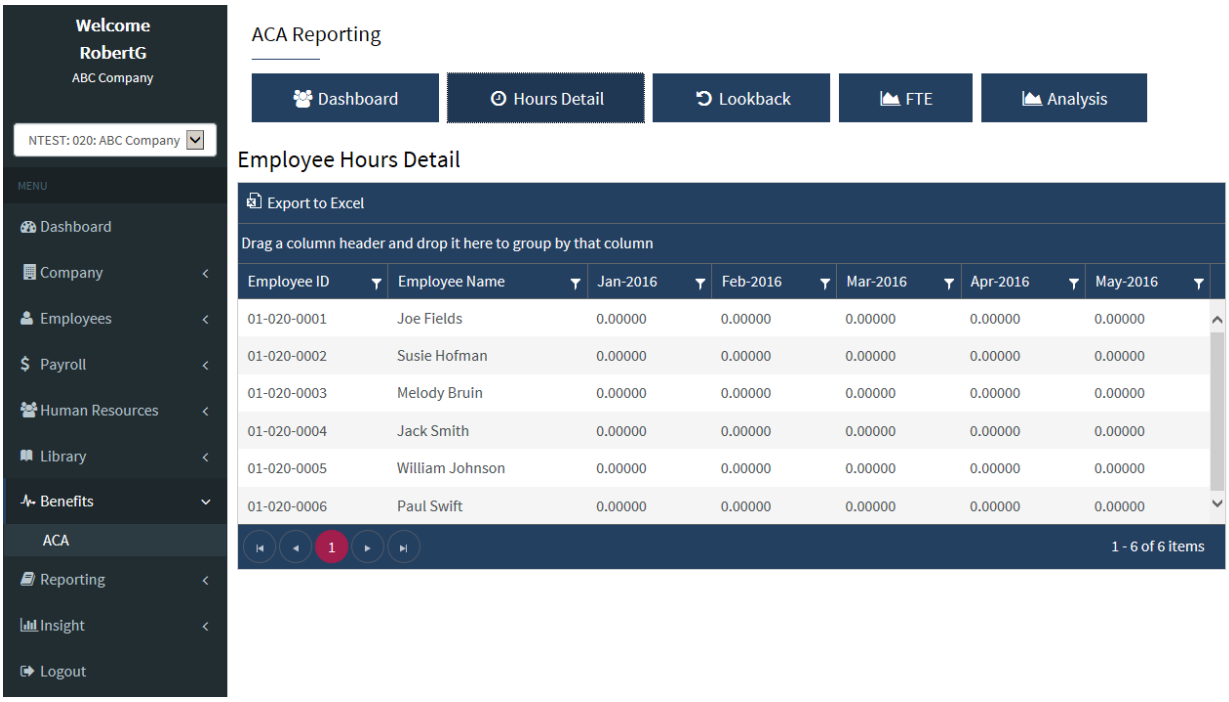
In this screen, you are presented with the breakdown of employee status (full time or part time), number of employees who have been offered coverage, and number of employees that are considered affordable.

Below the bar charts is a list of the full time employees.



Hours Detail

This menu breaks down the hours for each month for each employee for a year.



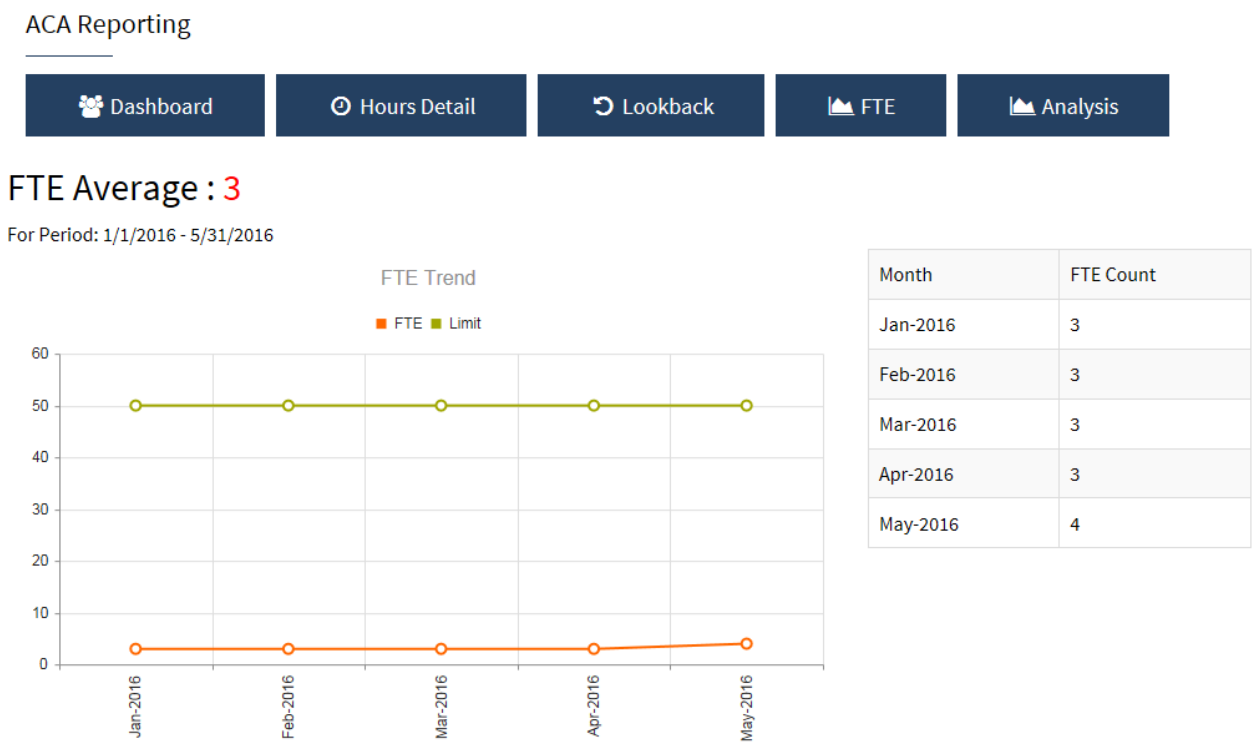
Lookback

This is the employee lookback period report for a year.

FTE

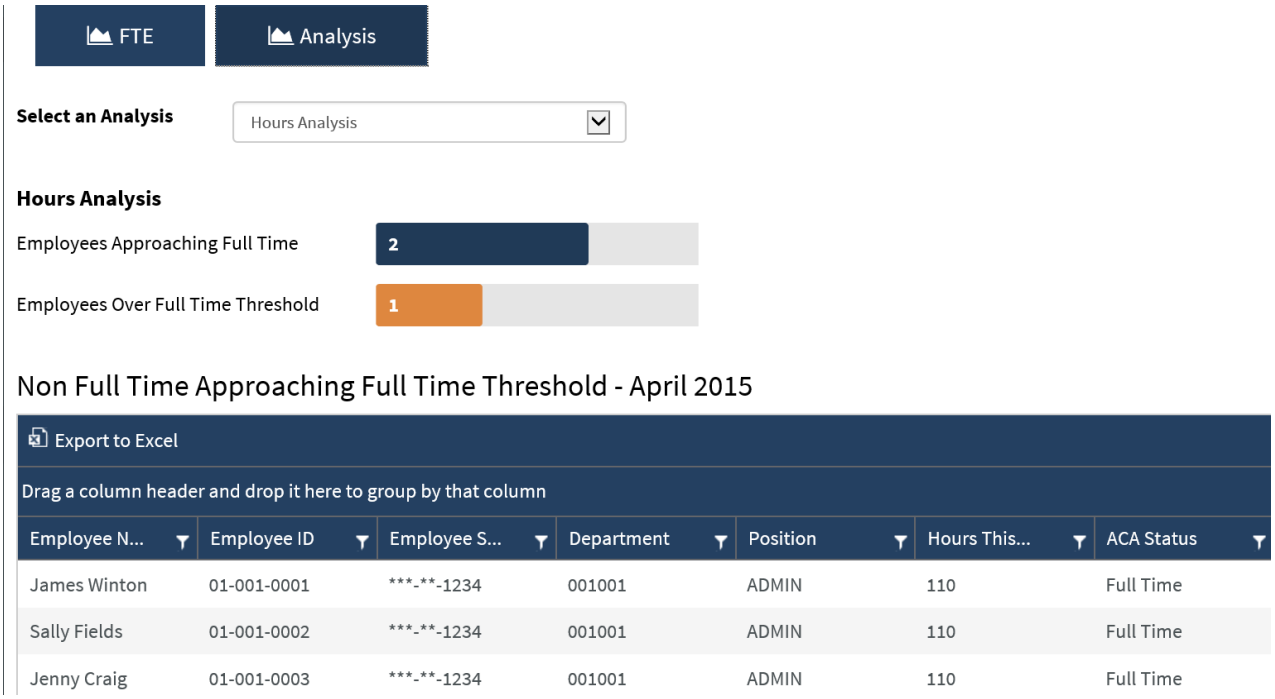
The graph in this view shows how many full time equivalent workers you had each month (compared to the number needed to be required to report ACA information).

The chart in this view lists a count of full time equivalent workers by month



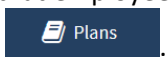
Analysis

In this menu, when you select Hours Analysis in the "Select an Analysis", you will see the number of employees approaching full time status and those over the threshold. Information about non full time employees that are near or over the thresholds that would put them as a full time employee are in a list below the bar charts.



When you choose “Affordability – What If” drop down option in the “Select an Analysis” field, you can

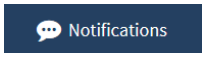
Enrollment

This section is for setting up elements that employees will use when enrolling in benefit plans . The first screen (below) lists the benefits plans 

. These plans are created in Darwin and transferred to DNet. The process for creating benefits plans is documented in the Plan Maintenace help documentation in the Darwin user guide.

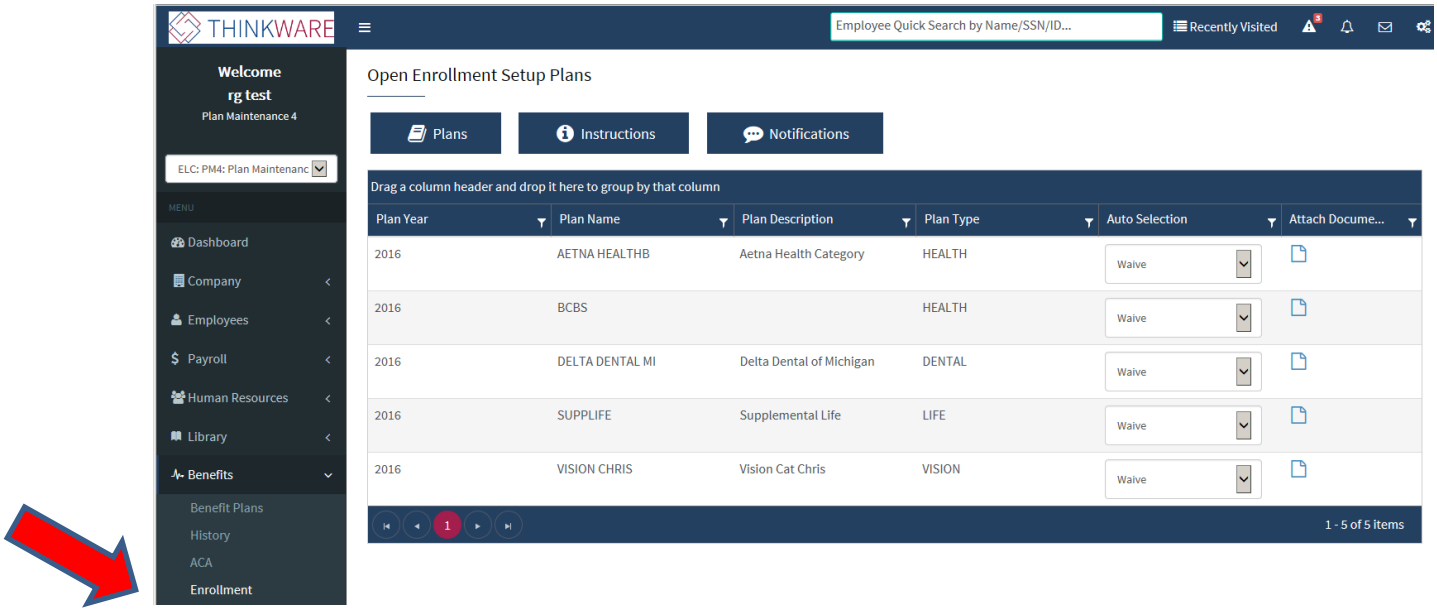
The Instructions section

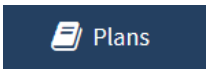
allows for setting up the instructions employees will see when going through the enrollment process.

The Notifications section 

is for setting up the notifications that will be created after an action is taken by the employee during the enrollment process. One example of an action is an employee submitting the plan choices after completing the plan information.

Path: Benefits > Enrollment (see red arrow in screen shot below).



Plans 

This window lists the plans this client offers to employees. These plans are set up in Darwin (using the Plan Maintenance application in Darwin).

Plan Year, Plan Name, Plan Description, and *Plan Type* is information imported from the Darwin settings chosen when plans were set up in the Plan Maintenance in Darwin.

Auto Selection This function is for future use. It allows for passive enrollment. Passive enrollment is a feature that will handle open enrollment for employees who do not complete it themselves in time.

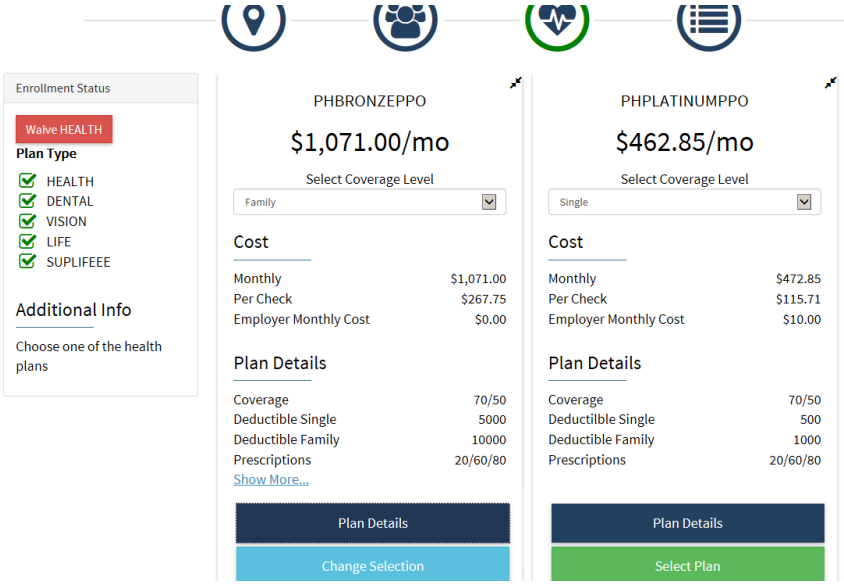
The client will be able to define plans and levels that will automatically be selected for an employee or whether to automatically waive all coverage.

The *Attach Document* column allows for adding a document that employees see when they are looking at the plan or completing their application.

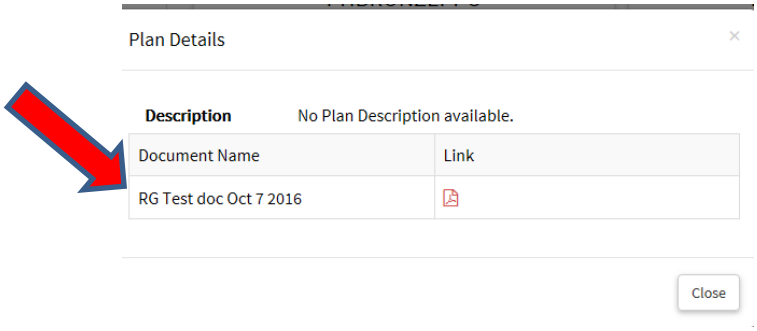
Note: If an attachment is saved as a *Presentation Only* (in the *Verification Type* field in the *Create Open Enrollment Document* window), it will show up for the employee when they click on the *Plan Details* button when on the Plan Selection Window. Additional explanation below.

When an employee is on the window in which they are selecting a plan (e.g. Benefits > Enrollments > Plans > Make Selection(s) – see example below – first graphic), when they click on the Plan Details button, the attached document will be available for viewing (see example below – second graphic).

Plan Selection Window (example):



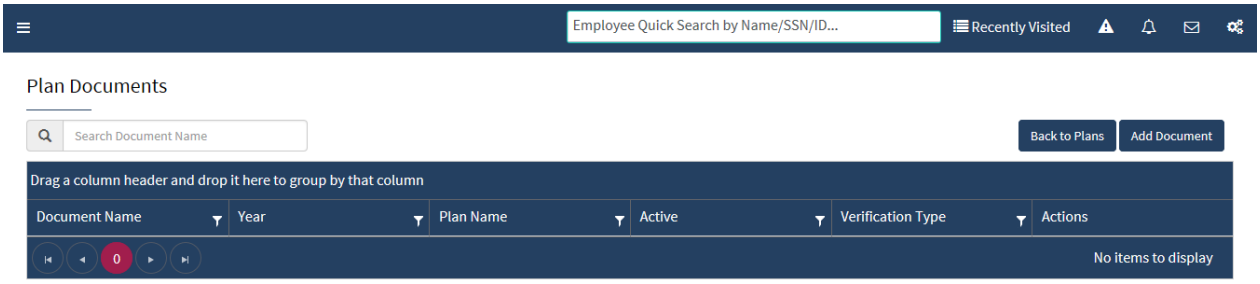
Attached document

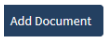


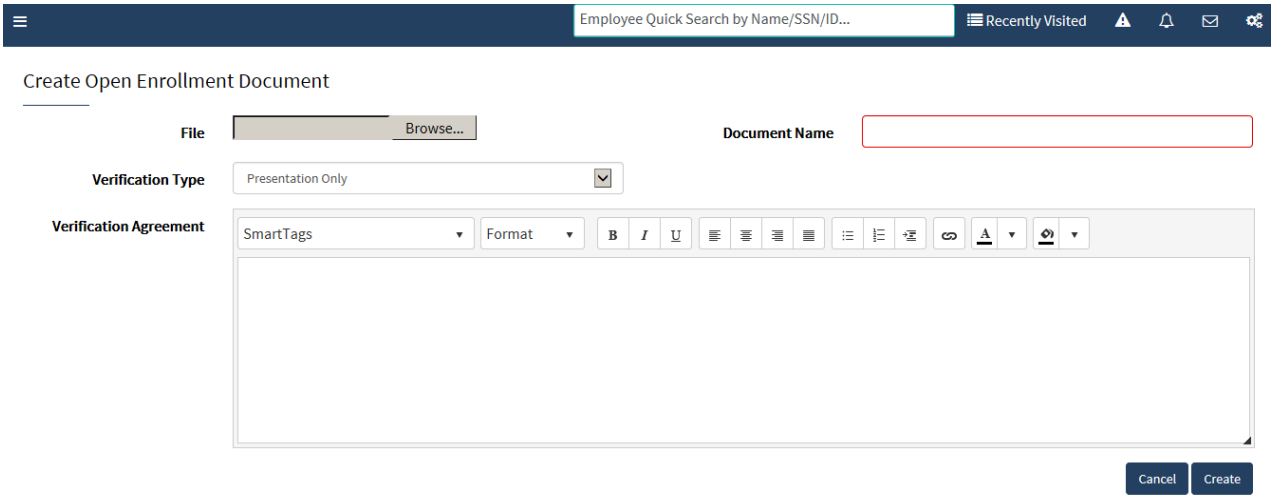
Note: If an attachment is saved as a *Has to Verify* or *Required Signature* (in the *Verification Type* field in the *Create Open Enrollment Document* window), it will show up for the employee when they are on the *Summary* window (in the Document Summary section). The *Summary* window is the final screen for the employee. These documents are placed on this final screen because they require an action (verification or signature).

Adding a Document

After clicking on the attach document icon (when on the Open Enrollment SetUp Plans window), this window below will appear.



Click the Add Document  button. The window below will appear.

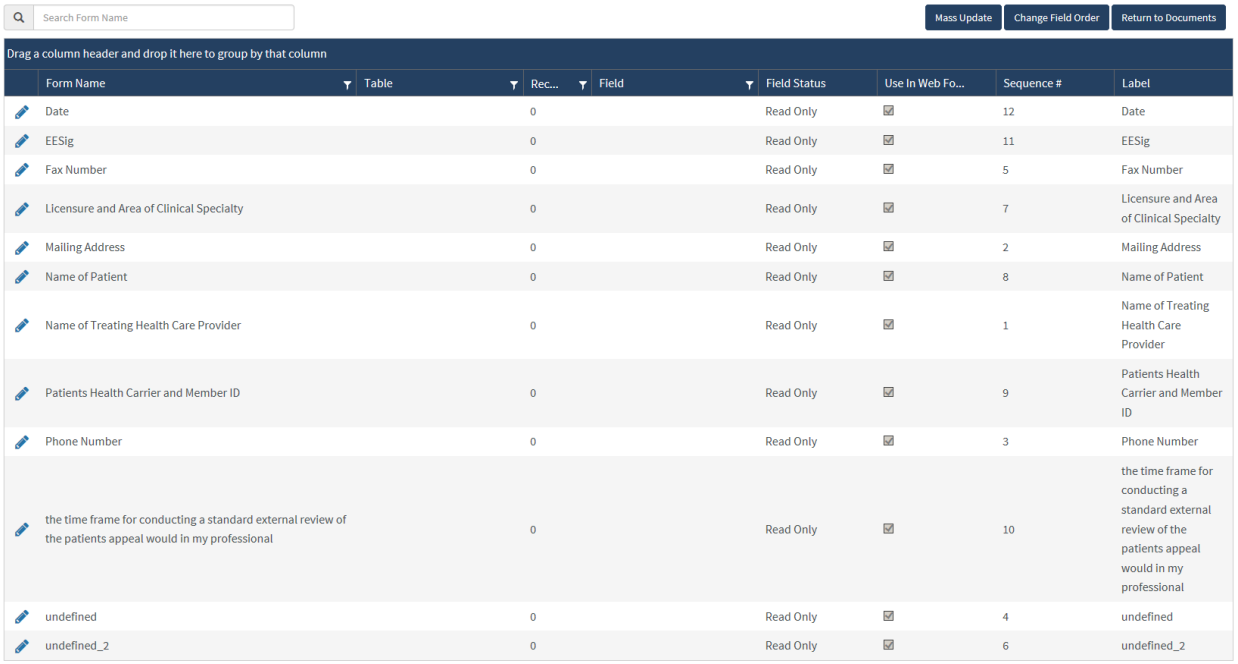


Key Items

File	Browse and select a document to attach. It must be in .pdf format with fields that can be mapped
Document Name	Type in the name for this document
Verification Type	
Presentation only:	Display only

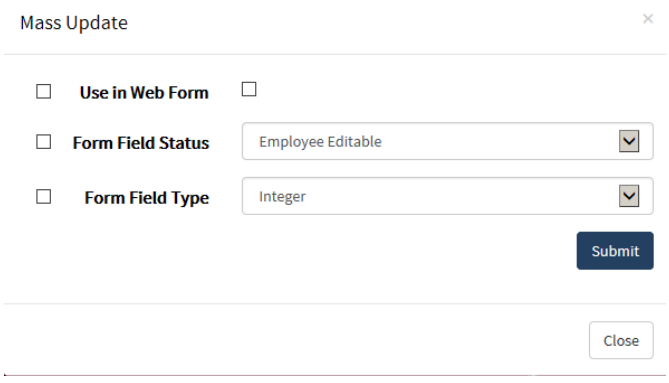
Has to Verify:	Verification needed but no signature needed
Required Signature:	Signature required by employee
Verification Agreement	Enter verbiage for what displays on the document verification

After clicking on create, the Document Mapping Window (see example below) will appear.

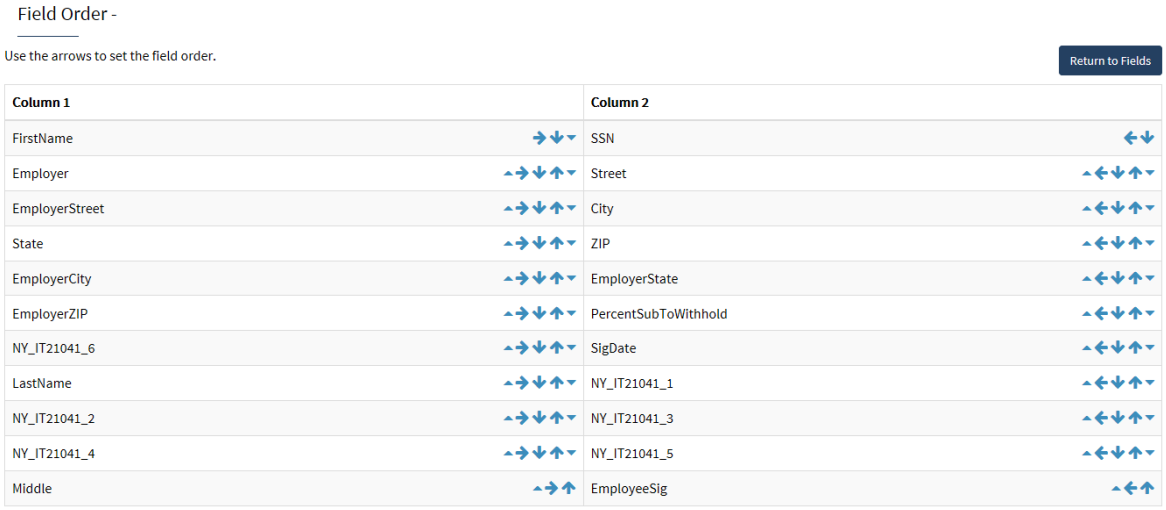


Key Items

Edit	See information below (Editing Field Mapping)
Mass Update	When selecting one or more forms (use the Shift key to select multiple forms) to update, when clicking on the *Mass Update* button, the screen below will appear. Check the appropriate box and drop down selection to determine what will be updated.



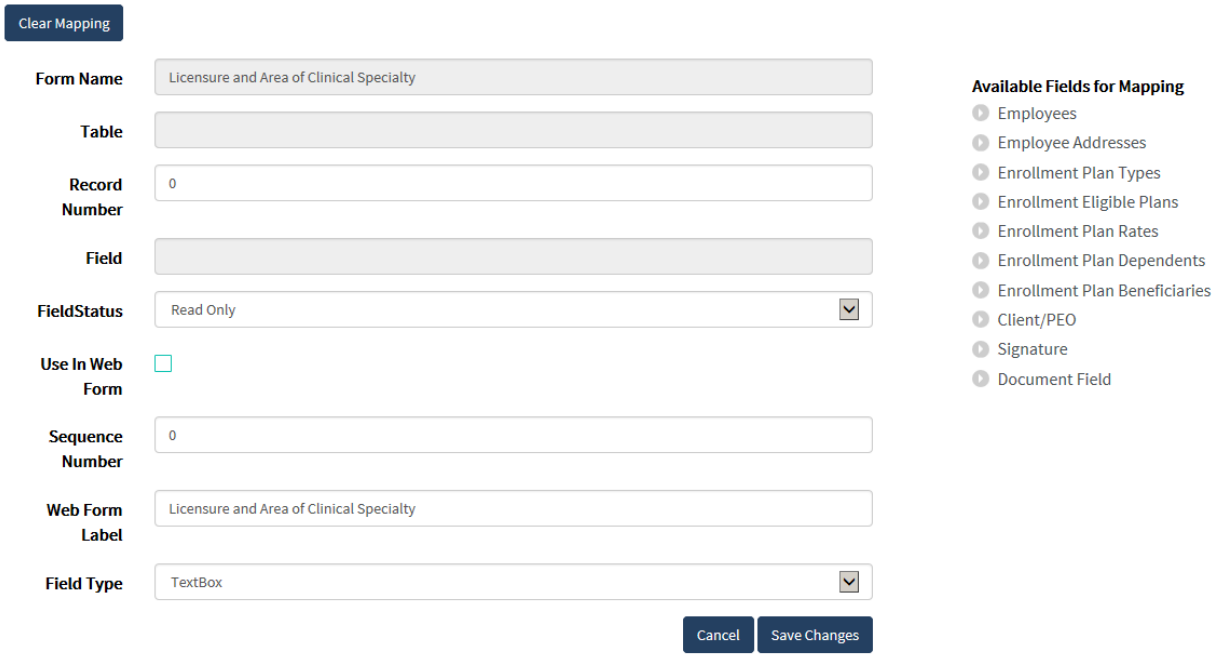
Change Field Order — After selecting a form and clicking the *Change Field Order* action button, you will have to option to make changes to the order of the fields on the form. See example below. Use the arrows to move up or down or right or left. Use the arrows to move the selected column to the first or last position.



Return to Documents — Click to go back to the *Open Enrollment Documents* window

Editing field mapping

Click on the edit icon to edit / map a particular field. You should see a window similar to the one below.



Key Items

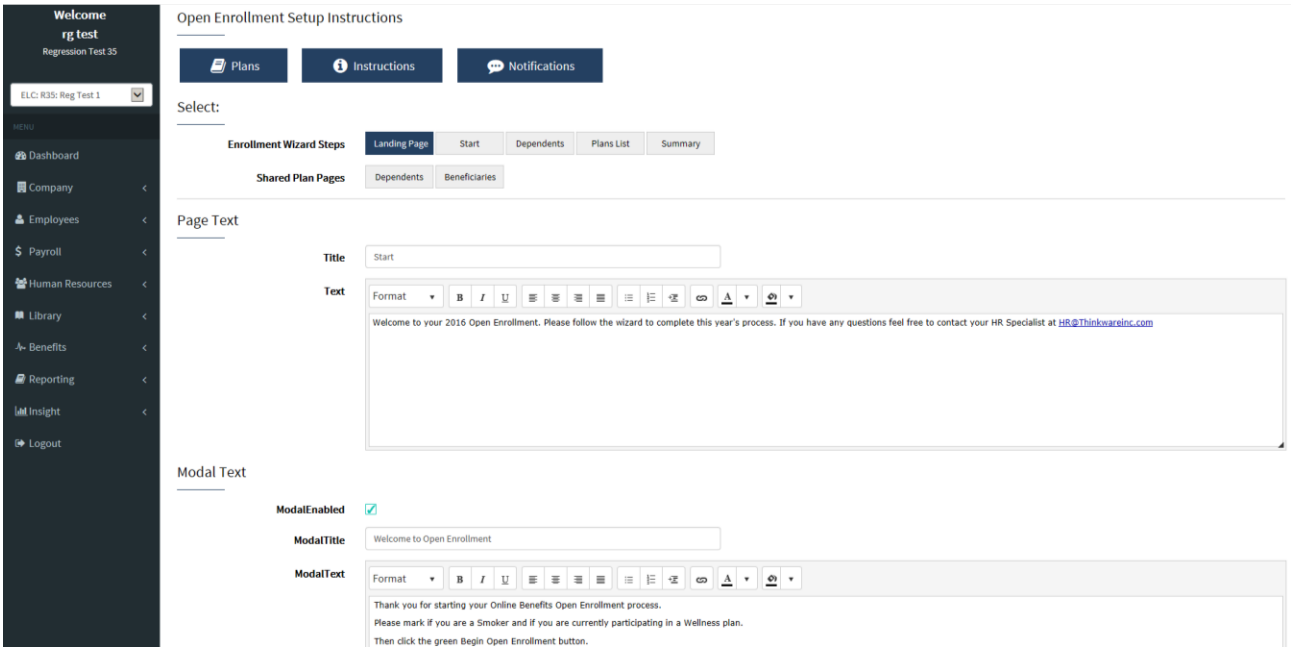
Form Name	Select a name for this form. This form is one you created and saved into DNet.
Table	When you select a field from the *Available Fields for Mapping* this table field will populate with the field name in the table. For example, if you choose *First Name* under the *Employees* in the *Available Fields for Mapping*, *Employees* will show up in this table field.
Record Number	If the same field is used twice, put in a sequential record number so the system knows the correct order to bring in the mapped data.
Field	When you select a field from the *Available Fields for Mapping* this table field will populate with the field name in the table. For example, if you choose *First Name* under the *Employees* in the *Available Fields for Mapping*, *First Name* will show up in this table field.
Field Status	Choose whether this form is read only, editable only by the client, or editable by both the client and the employee
Use in Web Form	If this box is checked then all forms will open up (on all browsers) as a web form. Otherwise, the form will open up in a native format in Microsoft Internet Explorer.
Sequence Number	This determines the order in which the fields appear on the form
Web Form Label	Name for the web form
Field Type	For selection of type of field
Available Fields For Mapping	Lists the fields in DNet 2 that have data that can be mapped into a document.

Note: If a document is added after a plan has been selected, select the plan again (using the *Change Selection* button) for the new document to appear.

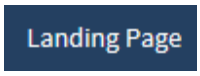
Note: If a document is to be deleted, how it is deleted depends upon how it was created. If the document was created by the system user, delete is in the appropriate system user window (see system user guide for more information). If the document was created by the Client User, delete it at the Client User level. Then delete it at the System User level to eliminate it from appearing for the user.

Instructions

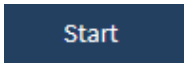
This area allows for entering the instructions for choosing benefits. See example below



Enrollment Wizard Steps



In the page text area, enter a title and text. These appear on the first page the employee see (the landing page) when enrolling in plans. You can also choose to use a Modal. A Modal is a pop up box that appears when a page opens. It is used to call attention to more details for this enrollment process. The modal can be turned on and off by checking the box next to ModalEnabled. The text in the modal is also able to be changed. Click the *Save Changes* button (at the bottom of the window) to save changes made.



If you would like to have a starting page (in addition to the landing page), this window allows for setting up that page. The capabilities are similar to the Landing Page (explained above). Click the *Save Changes* button (at the bottom of the window) to save changes made

Dependents

This page allows for setting up the instructions that employees see for completing information about dependents. Click the *Save Changes* button (at the bottom of the window) to save changes made.

Plans List

This screen is used for entering the title and text for the eligible benefit plans. Click the *Save Changes* button (at the bottom of the window) to save changes made.

Summary

Use this window for the text and title for the summary page. Click the *Save Changes* button (at the bottom of the window) to save changes made.

Shared Plan Pages

This window allows for entering title, text, and modal information for plan pages that appear in more than one place. For example, you may have selections for dependents for both your health and your dental plans. Because the instructions may be different from the dependents instructions in the *Enrollment Wizard Steps,* this form is available to provide additional information.

Dependents

This page allows for setting up the instructions that employees see about dependent information - after selecting an plan (e.g. dental plan). Click the *Save Changes* button (at the bottom of the window) to save changes made.

Beneficiaries

This page allows for setting up the instructions that employees see about beneficiary information - after selecting an plan (e.g. dental plan). Click the *Save Changes* button (at the bottom of the window) to save changes made.

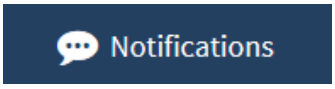
PCP

Use this window for instructions when an employee is asked to enter information about their primary care Physician. If a PCP needs to be selected, a form will appear for an employee to complete.

Amount Entry

This window is used when an employee is asked to enter an amount for a particular benefit.

Notifications



This area is for setting up information for notifications. Notifications are emails that are sent out by the software at designated intervals/triggered by specific events. This window allows for enabling notifications, putting in a title for the notification, and putting in the text for notifications.

Select a Type

Invitation

If you use this function, enable it and enter the title and text that employees will see in an email when they get an invitation to enroll in benefit plans. The

Welcome/Invitation notification will be sent when a new employee is discovered/added to the OE Monitor screen (in the On-Boarding section – path: Employees > Benefits > OE Monitor). Remember to save this after you make changes.

Empl. Finalize

Use this window for information in the email that employees see after the employee signs all documents and submits (on the last / *Summary* screen). The finalize notification will get sent after an employee signs all relevant documents, puts in their UserID, password, and social security number, and then submits their approval (Submit button on the Summary screen)

Overdue

This function sends an employee, a client contact person, and a system user a warning X days prior to the end of Open Enrollment if they have not completed their open enrollment selections. This parameter is set in the Customize window (path: Company > Tools > Customize) in the *Days Prior to OE End warning notification* field

Select an Assignment

Use these three options to choose to whom the notification is sent (the employee, the client, or the system user) – if appropriate. For some of the types the assignment options will differ. For example, the Invitation will only have 'employee' as an option.

Check the *Enabled* box if you want to have an email notification sent to that particular user.

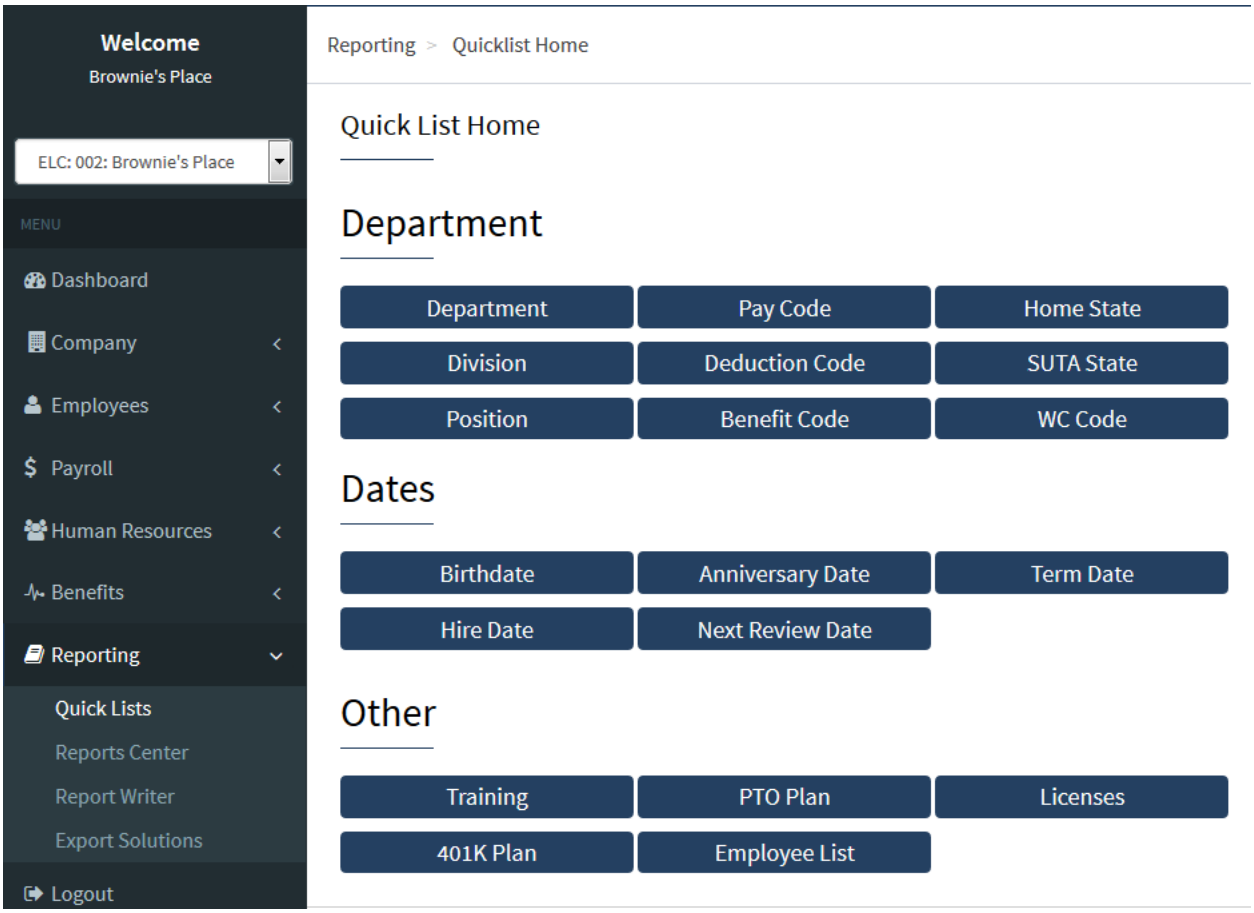
If *Default* is checked, a default notification message is sent. Default notifications are set by the System User.

If not using the default option (uncheck the default box), the ability to a subject and text that will be available. This is what will appear in the email that will be sent.

Reporting

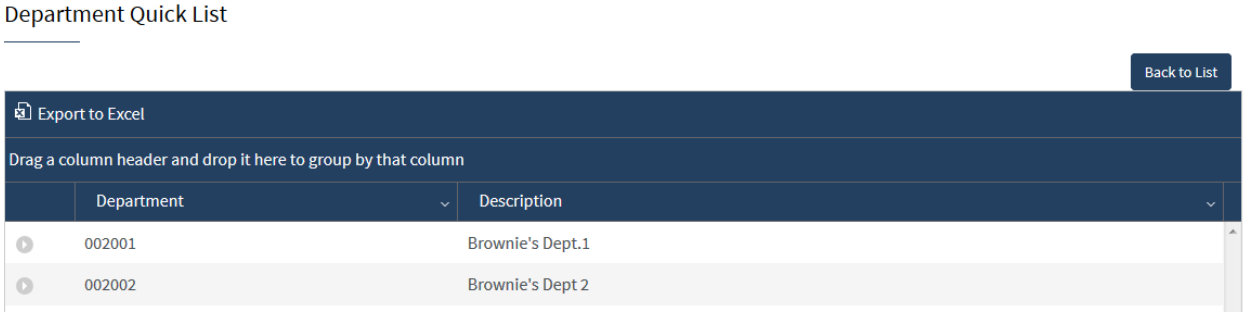
Quick Lists

The Quick Lists page can be accessed via the Reporting drop down from the navigation column on the left (path: Reporting > Quick Lists). It provides consolidated information on several key areas. These are separated into three main sections: Department, Dates, and Other.



Department

Department displays a list of all assigned Departments and the affiliated Employees.



Use the Expansion arrow ( ) for additional detail. See example below. Selecting an Employee will take you to the respective Employee Info page.

Department Quick List

Back to List

Export to Excel

Drag a column header and drop it here to group by that column

Department	Description
002001	Brownie's Dept.1

Employee ID	Employee Name	SSN	Position	Inactive
020020001	Bill Jackson	572-34-8969	BAR	false
0200200015	Johnny Galeki	421-63-8549	BAR	false
0200200017	Miranda Bailey	445-12-3687	ADMIN	false
0200200018	Christina Yang	471-56-2139	ADMIN	false
020020002	Edward Travis	231-34-2344	BAR	false
0200200021	Jim Parson	552-13-4678	BAR	false
0200200024	Blossom Russo	639-82-5741	BAR	false
0200200027	John Gruden	421-32-1621	MANAGR	false
020020003	Gary Quill	983-47-8788	BAR	false
020020004	Karen Richards	256-54-9679	BAR	false

1 2 1 - 10 of 18 items

1 1 - 2 of 2 items

Pay Code

Pay Code displays a list of all assigned Pay Codes and affiliated Employees.

Pay Code Quick List

Back to List

Export to Excel

Drag a column header and drop it here to group by that column

Pay Code	Description
BONUS	Bonus Pay
BUSEXP	Business Expense
COMMBI	Commission BiWeekly

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Home State

Home State displays a list of all assigned Home States and the corresponding Employees.

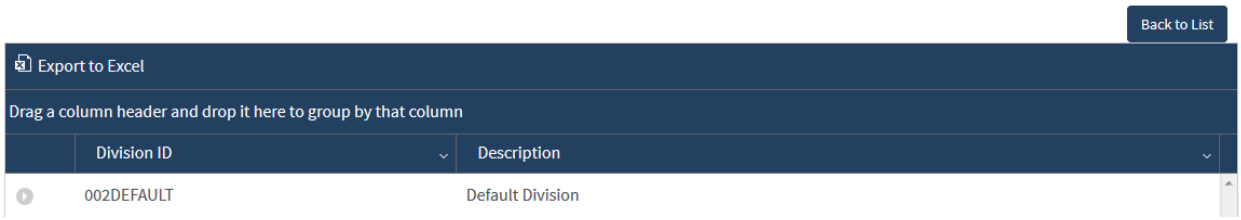
Home State Quick List

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Division

Division displays a list of all assigned Divisions and affiliated Employees.

Division Quick List

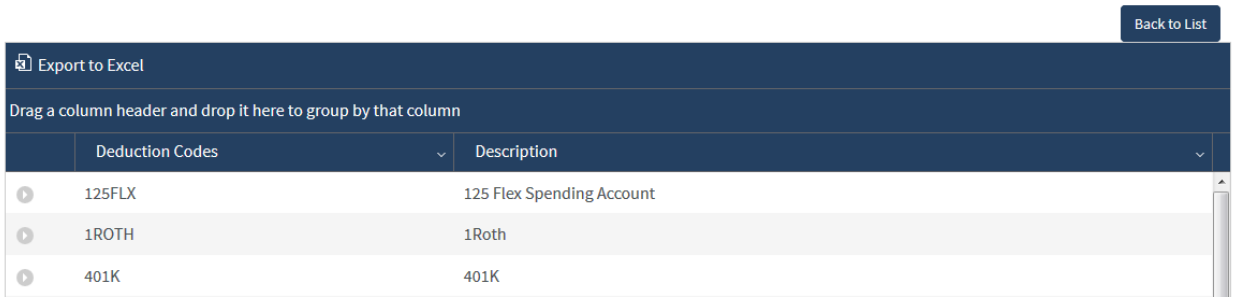


Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Deduction Code

Deduction Code displays a list of all assigned Deduction Codes and affiliated Employees.

Deduction Code Quick List



Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

SUTA State

SUTA State displays a list of all assigned SUTA States and the corresponding Employees.

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Position

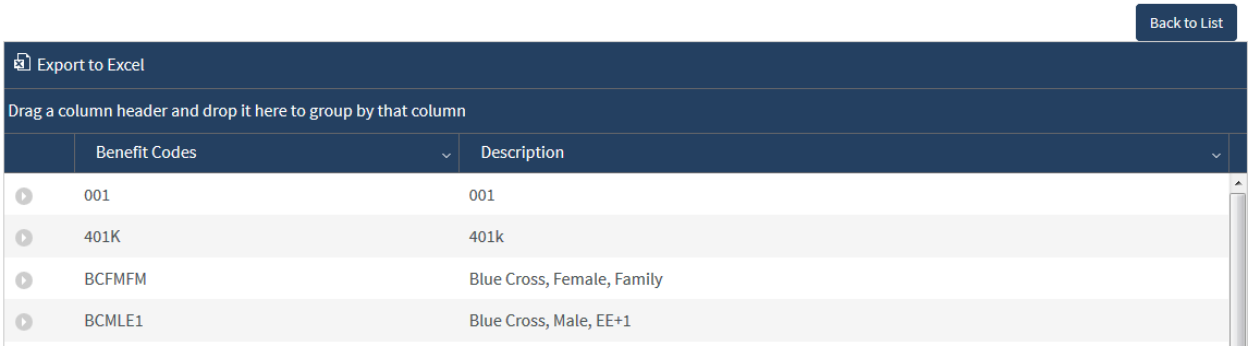
Position displays a list of all assigned Positions and affiliated Employees.

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Benefit Code

Benefit Code displays a list of all assigned Benefit Codes and affiliated Employees.

Benefit Quick List

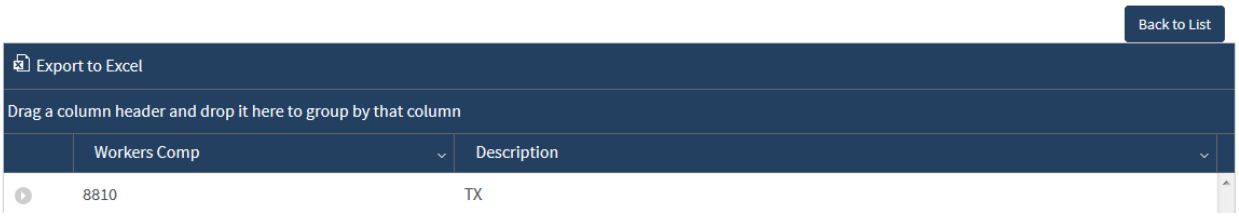


Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

WC Code

WC Code displays a list of all assigned WC Codes and affiliated Employees.

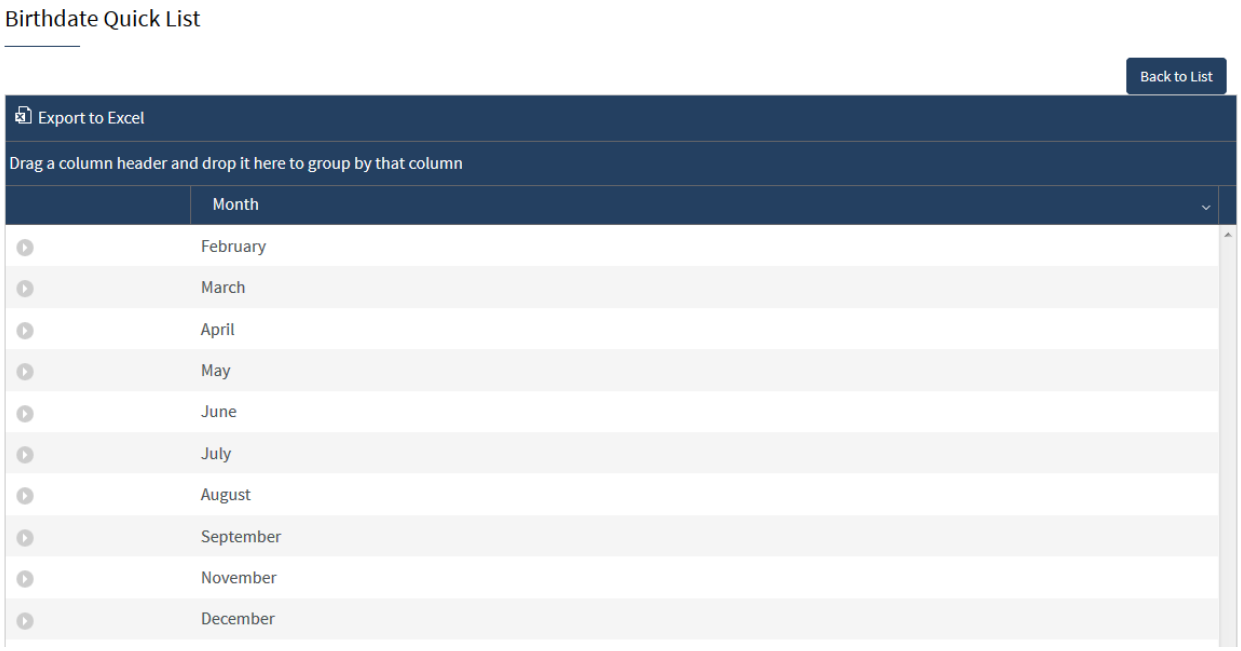
WC Code Quick List



Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Birthdate

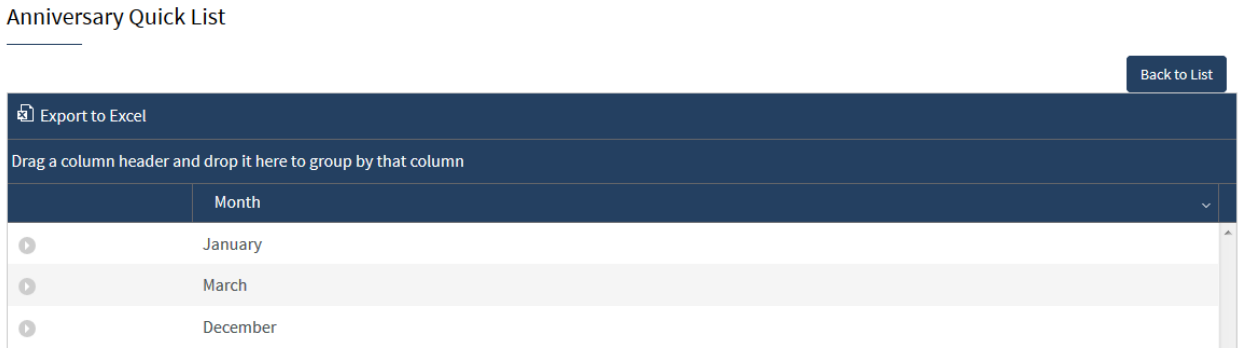
Birthdate displays a list of all Employee Birthdays sorted by month.



Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Anniversary Date

Anniversary Date displays a list of all Employee Employment Anniversaries sorted by month.



Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Term Date

Term Date displays a list of all Employee's dates of termination. The list is sorted by month.

Term Quick List

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Hire Date

Hire Date displays a list of all Employee Hire Dates sorted by month.

Hire Date Quick List

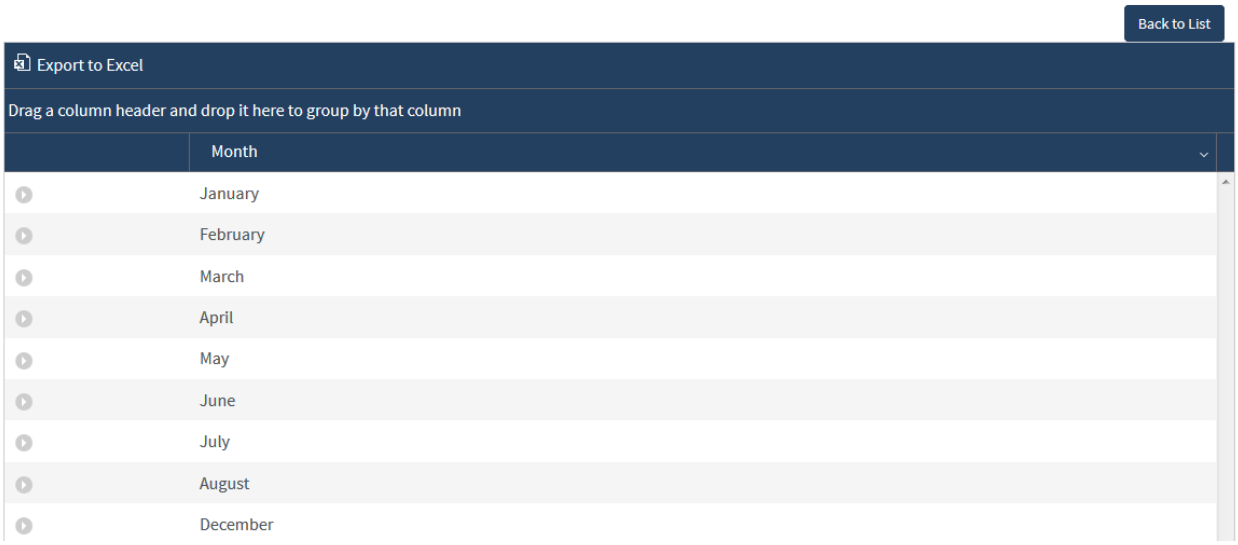
Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Next Review Date

Next Review Date displays a list of all upcoming Employee Review Dates sorted by month.

Note: This review date can be set up in DNet or Darwin. In DNet, there is a reviews section for Employees (Client -> Employees -> List -> Desired Employee -> HR -> Reviews -> Add Review), here you can set up new Reviews and set the next Review date. In Darwin, there is also a single 'Next Review Date' field on the Employee Additional info screen.

Next Review Quick List



Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Training

Training displays a list of all assigned Trainings, and affiliated Employees.

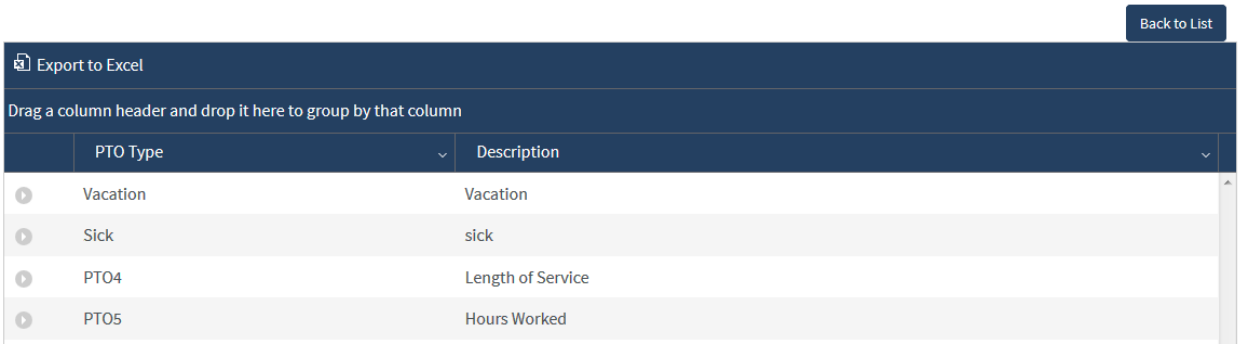
Training Quick List

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

PTO Plan

PTO Plan displays a list of all assigned PTO Plans and affiliated Employees.

PTO Quick List

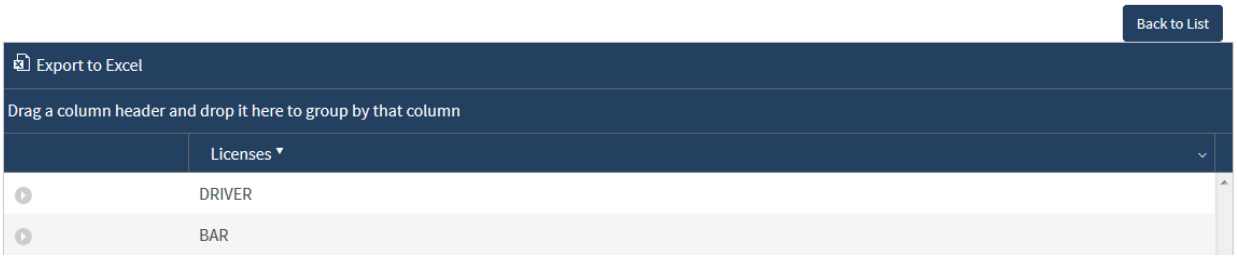


Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

Licenses

Licenses displays a list of all assigned Licenses and affiliated Employees.

Licenses Quick List

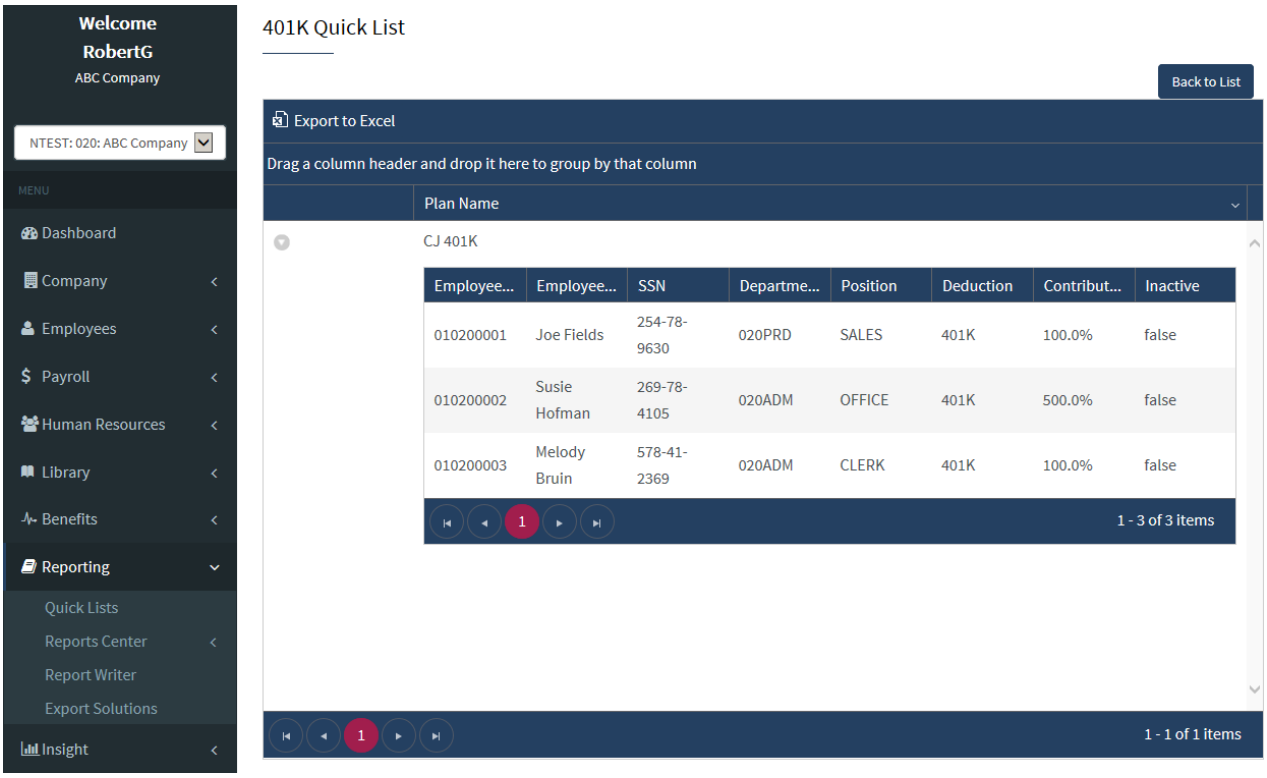


Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.

401k Plan

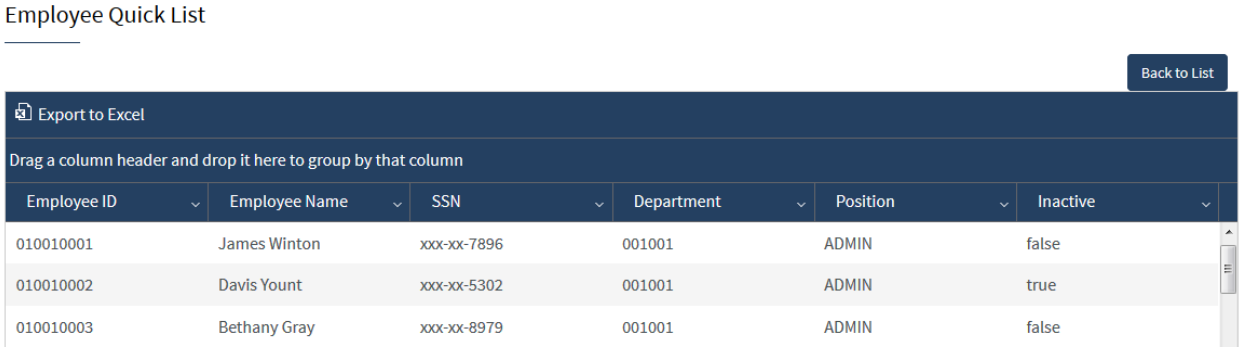
401k Plan displays a list of all assigned 401k Plans and affiliated Employees.

Use the Expansion arrow ( ) for additional detail. Selecting an Employee will take you to the respective Employee Info page.



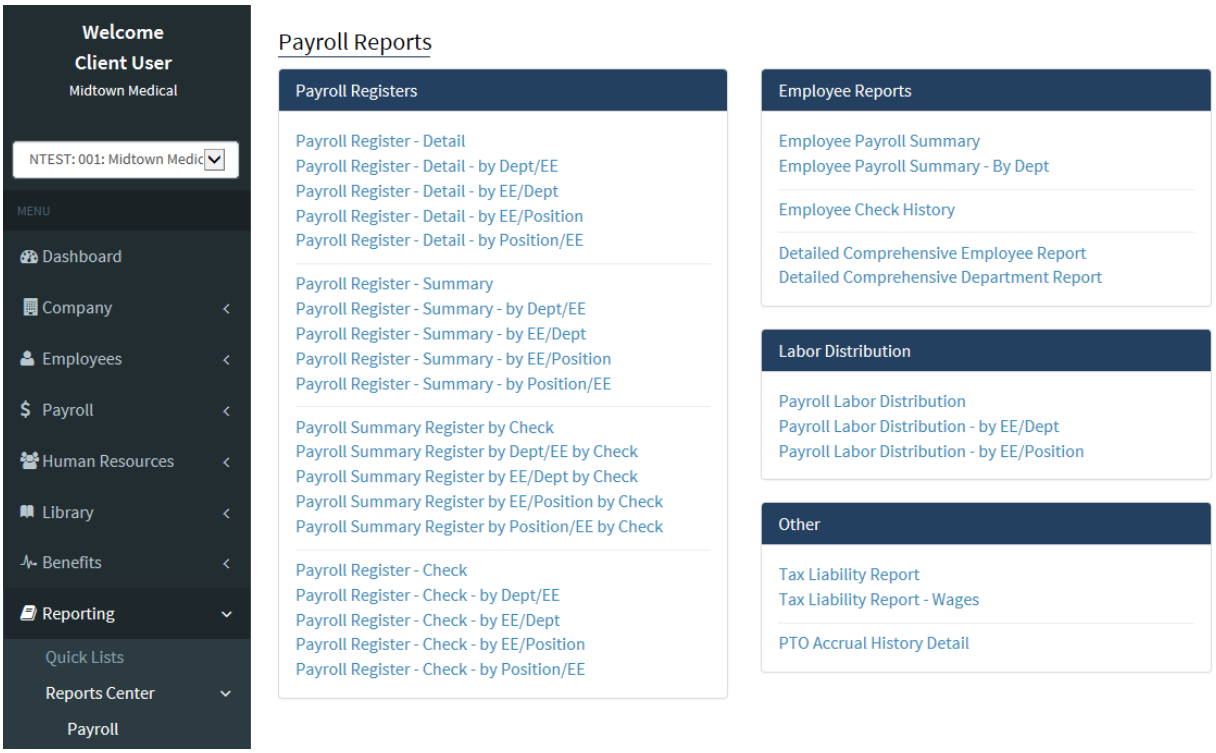
Employee List

Employee List displays a list of all affiliated Employees.

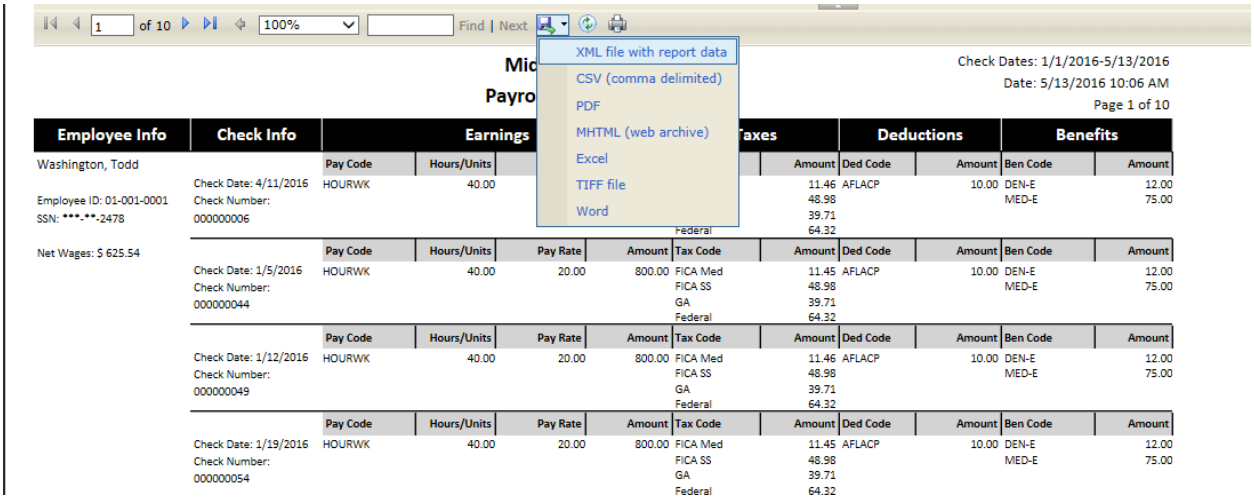


Reports Center

The Reports Center menu allows you to run pre-defined reports on Payroll, Invoices, HR, and Benefits for date ranges that you select. These reports use data that has been uploaded to DarwiNet from Darwin.



These reports can be printed or saved in several different formats.



Other

The Other Reports menu is a listing of reports that are uploaded by the PEO. This function gives the PEO the opportunity to upload reports that they want the client to have access to in DarwiNet that were not generated in the Darwin payroll system.

Report Writer

Export Solutions

Insight

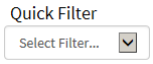
The purpose of Insight is to give a client user a quick graphical view of their Payroll and Invoice data such as; gross wages, taxes paid, and hours worked. This is intended to help the user identify and understand trends in their financials and labor force.

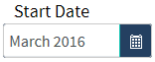
Note: In each of the Insight menus, one navigation item is that you have a scrolling date bar (see example in the graphic below) you can use to set your time frame.

Dashboard

This menu item allows you to view information using categories and time frames you choose. This provides flexibility for choosing a time period for which you would like to view information.

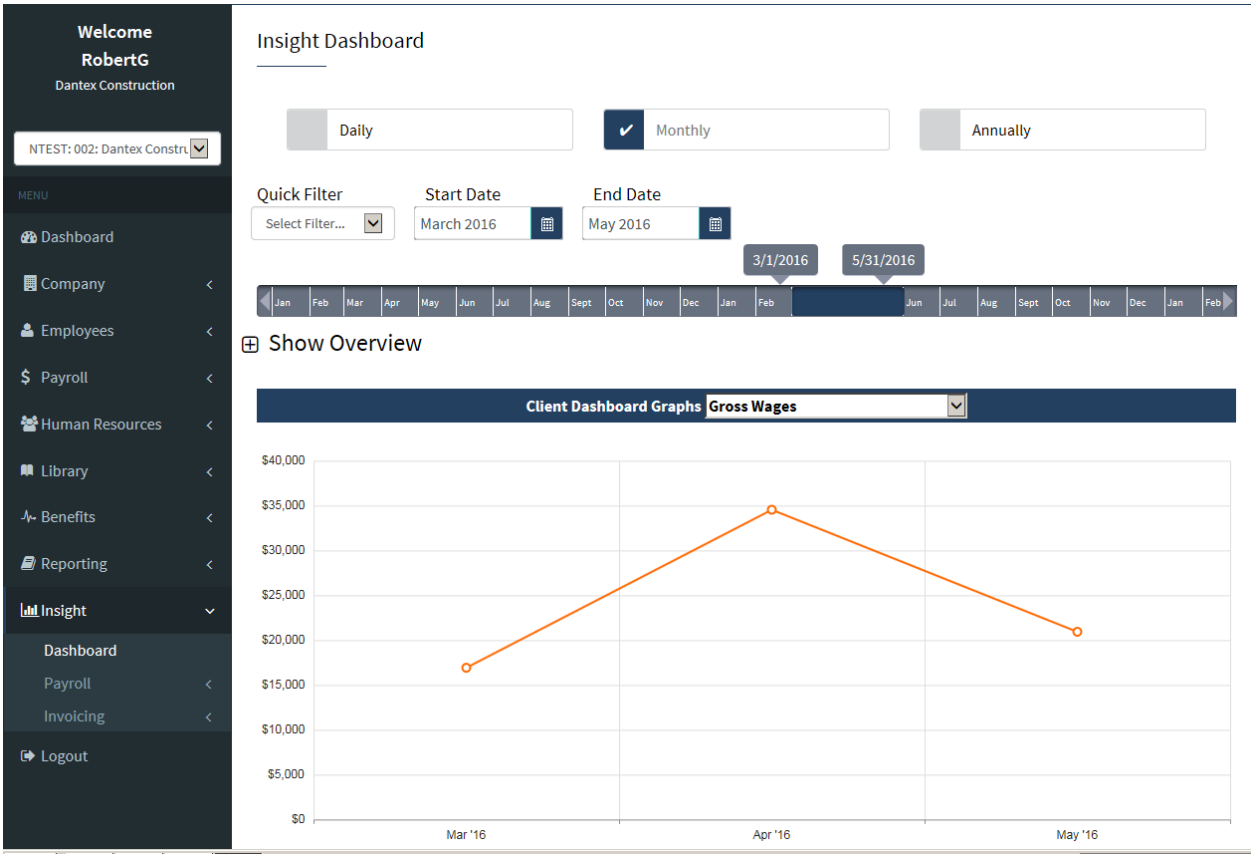
As you can see from the sample screen below, you can choose a daily, monthly, or annual (called annually) view.

Select a time frame by using the Quick Filter 

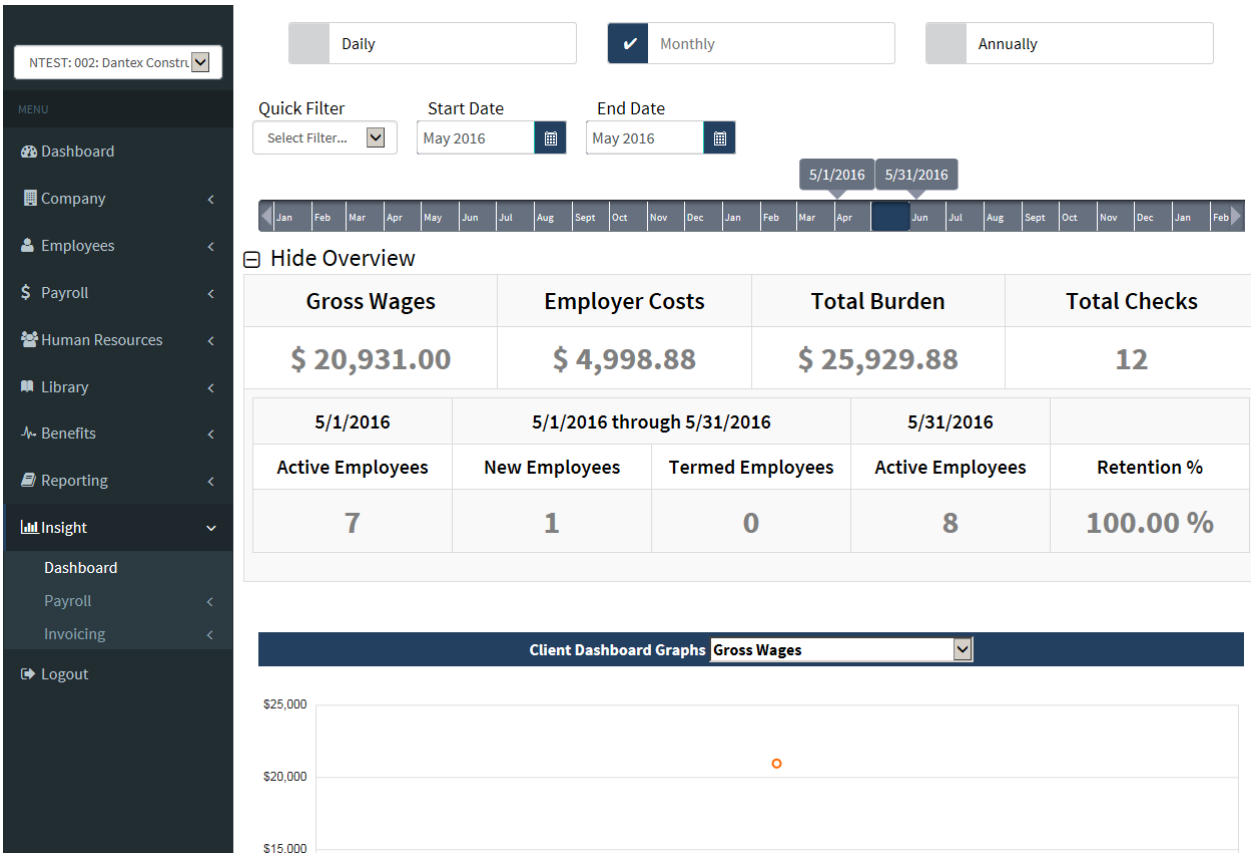
or Start Date 

and end date

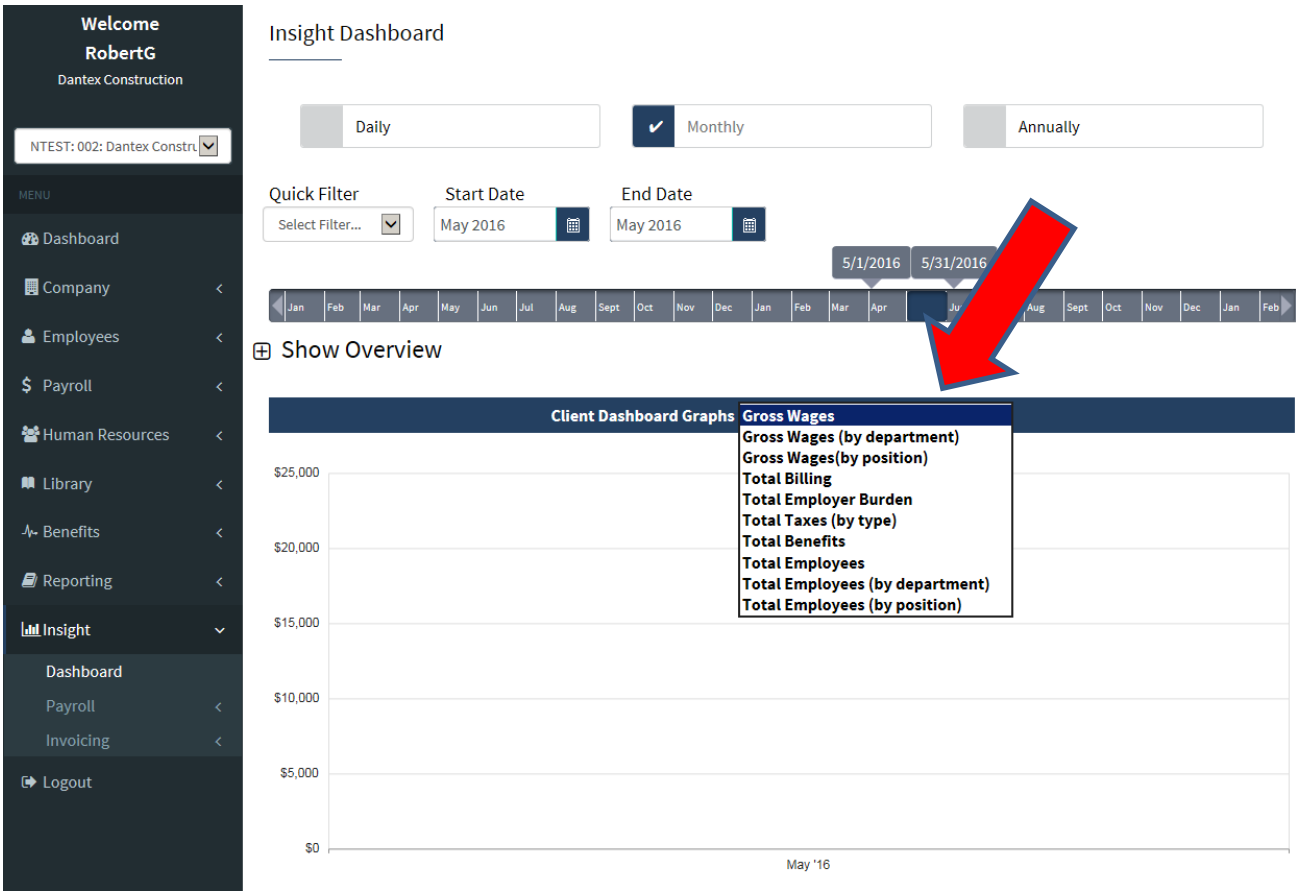
to get the time frame you desire. Or use the scrolling date bar (graphic above) to choose dates.



Click the ⊞ Show Overview button to get more information. You will see an expanded screen similar to the one below.



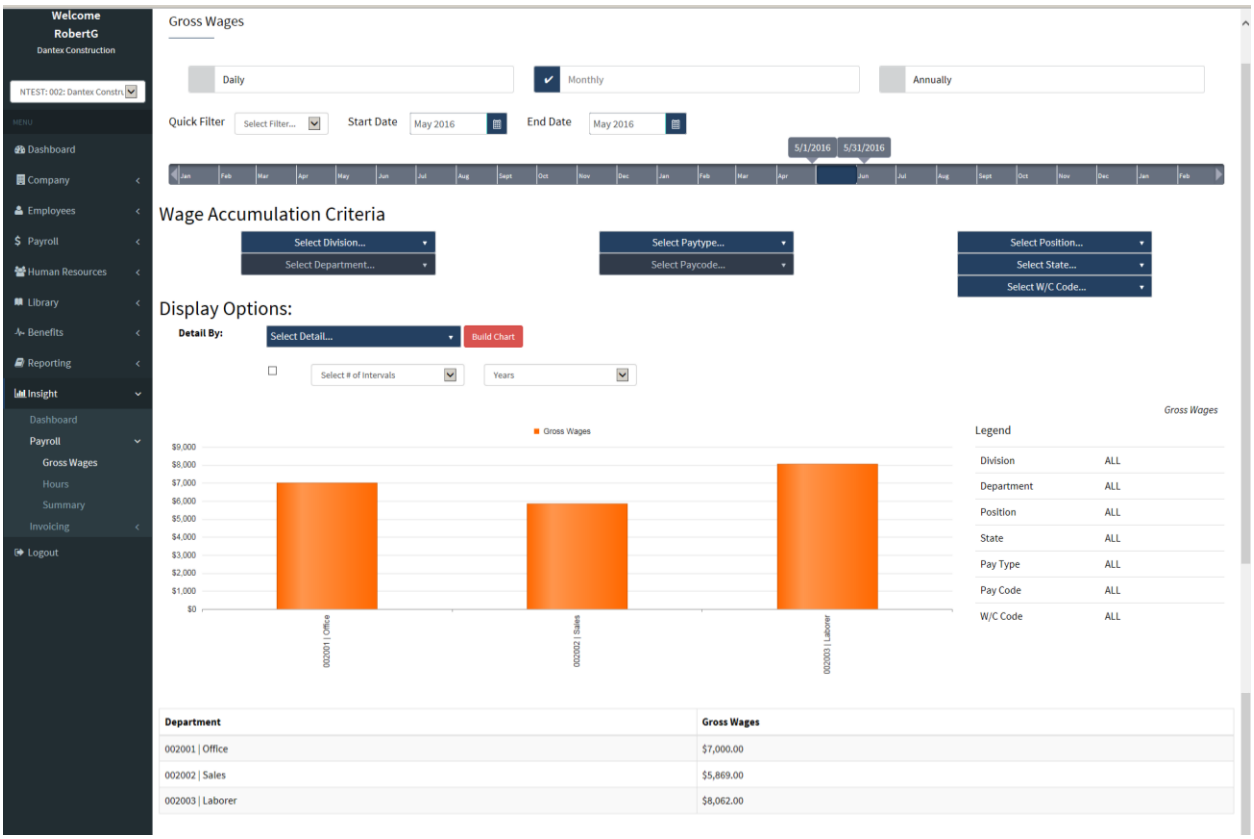
In the Client Dashboard Graphs click the arrow to select (see screen shot below) what information you want to have appear in the lower graph.


Welcome
RobertG
Dantex Construction
NTEST: 002: Dantex Constru
MENU
Dashboard
Company
Employees
Payroll
Human Resources
Library
Benefits
Reporting
Insight
Dashboard
Payroll
Invoicing
Logout
Insight Dashboard
Daily
Monthly
Annually
Quick Filter
Select Filter...
Start Date
May 2016
End Date
May 2016
5/1/2016
5/31/2016
Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec Jan Feb Mar Apr Aug Sept Oct Nov Dec Jan Feb
Show Overview
Client Dashboard Graphs
Gross Wages
Gross Wages (by department)
Gross Wages(by position)
Total Billing
Total Employer Burden
Total Taxes (by type)
Total Benefits
Total Employees
Total Employees (by department)
Total Employees (by position)
$25,000
$20,000
$15,000
$10,000
$5,000
$0
May '16

Payroll: Gross Wages

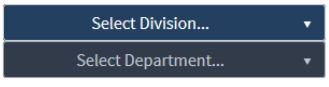
After the Dashboard, the next menu item is Payroll: Gross Wages. The path to this screen is: Insight > Payroll > Gross Wages.

In this menu, you make selections on parameters (e.g. division, department, pay type) to view gross wages data.

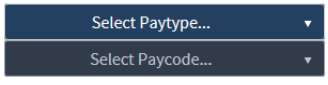


Key Items

Wage Accumulation Criterion

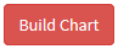


Select the Division and / or Department for which you would like to see data

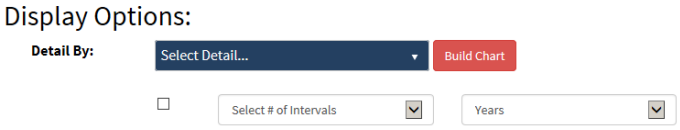


Select the Paytype and / or Paycode if you want to see information based upon these parameters

If desired, choose a position, a state, and or a worker's compensation code for data selection.

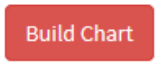
Click on  to display the chart (below the criteria) based upon your selection criterion.

Display Options



Detail By: Select Detail — Select an item (e.g. Division) to display that information

Select # of Intervals — Click the checkbox ☐ until a check appears in it. Then choose your interval and choose years or intervals in the second drop down box.

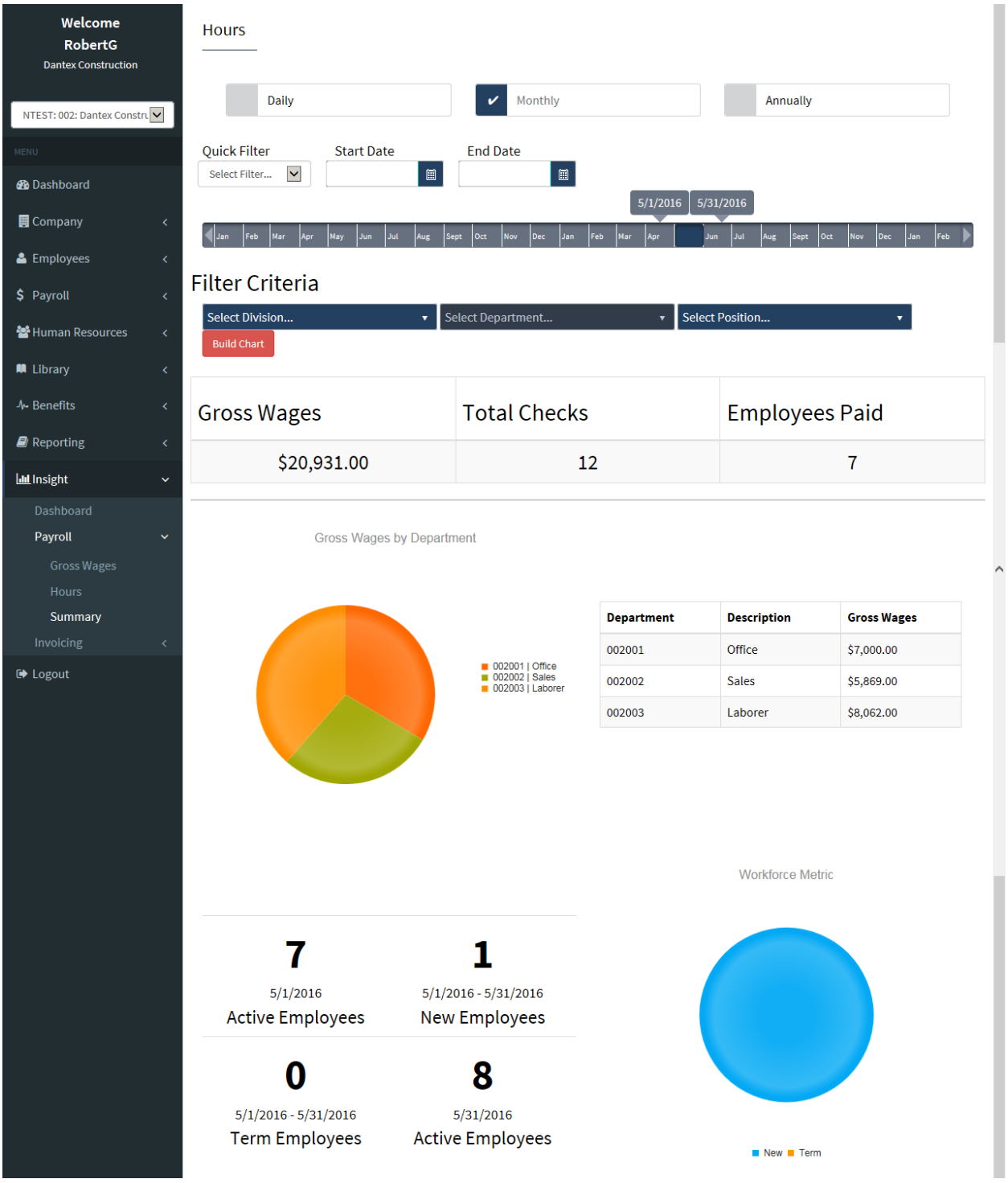
Click on  to display the chart below based upon your selection criterion.

Payroll: Hours

This next menu item on the main navigator (after Payroll: Gross Wages) is Payroll: Hours. The data selection process for this menu item is similar to the process for Payroll: Gross Wages (see instructions for Payroll: Gross Wages above).

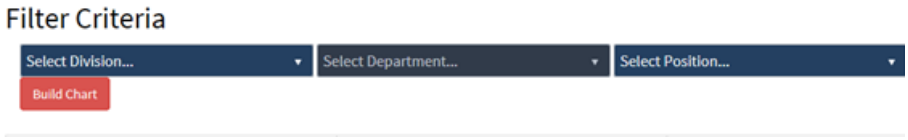
Payroll: Summary

In this view, you have Filter Criteria to use for summary information. A screen shot of the main view is below.



Key Items

Filter Criteria: Use this Filter Criteria to select a division, department, and or position



Note: Click on Build Chart to display the chart below based upon your selection criterion.

Invoicing: Details

This section enables you to get graphs for details on invoices.

Key Items

Invoice Detail Criteria: Use this criteria to select a division. Then click on Refresh Chart

Invoicing: History

This section enables you to get past / historical invoices for viewing. The invoices appear in the grid below – based upon your criterion selection.

Key Items

Invoice History Criteria: Use this criteria to select a division. Then click on Refresh Grid