

# HUMAN RESOURCES

## Solutions for Human Resource Management in Microsoft Dynamics GP

White Paper

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## **Introduction**

Human Resource Management is an integral part of every organization, regardless of industry. Working together as strategic partners, Human Resource professionals need to manage the “people asset” components of the organization, including recruitment, employee hiring, compensation, benefits, performance management, and on-going employee issues.

With this in mind, Microsoft is expanding core functionality of Microsoft Dynamics™ GP, as well as making additional product enhancements to meet the ever changing needs of clients, with the ultimate goal of increasing productivity and efficiency.

A new module for Microsoft Dynamics GP, Advanced Human Resources, allows HR professionals and staff to strategically manage your organization’s most important business asset- your employee. Advanced Human Resources includes the following components and capabilities:

- The Employee Health and Wellness Manager allows users to track all required immunizations, vaccinations and tests, as well as record the test results. Having this data available will enable easy searches on who is past due or scheduled for a particular time. In addition, various reports and ad hoc reporting using SmartLists will be available.
- The Certification, License, and Training Manager enables users to track employee certifications, licensing, and training, along with expiration dates and renewal periods for certifications and licensing. In addition, various reports and ad hoc reporting with SmartLists will be available.
- The Benefits Enrollment Manager takes advantage of the Windows SharePoint® Services platform and Microsoft® Business Portal to enable Web-based benefit enrollment for annual benefit enrollments, new employee benefit enrollments, and life change benefit enrollments. This enhancement allows the organization to setup and deploy an on-line benefit enrollment in a quick and efficient manner. Benefits Enrollment Manager allows HR staff to maintain control with flexible configuration and benefit assignment to each group of employees.
- The Benefits Lifecycle Manager enables users to create HR benefit, payroll benefit, and payroll deductions records that are not immediately effective. At the appropriate time, the user will be able to activate the records, while tracking past setup records in history.

This white paper is designed to provide Microsoft Dynamics GP customers and partners with examples of how this solution will help to automate and streamline the processing of employee information. Common business scenarios are used to demonstrate the business value that can be gained by utilizing Advanced Human Resources for Microsoft Dynamics GP.

## **Familiar to Your People**

Advanced Human Resources has been developed and will work in conjunction with Microsoft Dynamics GP. The module shares the look and feel of the Microsoft Dynamics GP solution your employees already use, helping reduce training time and freeing employees to focus on more critical business issues. Advanced Human Resources was designed with a focus on the roles that HR and Payroll professionals

play in your organization. Just as important, Advanced Human Resources offers an individualized, task-based user experience and easy customization based on user preferences and work style. That can mean less training and development time and a quicker return on your investment.

### **Common interface**

Microsoft continues to build integrated, adaptable business management solutions that have a common look and feel, mirroring that of Microsoft Dynamics GP, without sacrificing the requirements for concentrated transaction entry that is appropriate for specific users of a business application. A familiar user experience can help lower training costs while empowering users to get more out of the application.

### **Personalized navigation**

Microsoft Dynamics GP makes it easy for employees to personalize their views to mirror their processes. Because Microsoft Dynamics GP offers list-based navigation with cascading menus, users can easily create favorites to give themselves quick access to frequently used areas of the business solution. Easy customization of the navigation pane helps improve productivity and employee efficiency.

A roles-tailored design presents relevant information and processes to individual users, helping ensure that the right data is at every user's fingertips and limiting access to the data the user does not need. Access to sensitive data is protected, because users only see the information for which their role has access.

## ***Automate and Streamline Processes with Advanced Human Resources***

Advanced Human Resource for Microsoft Dynamics GP is designed to help organizations automate and streamline processes related to the following areas:

- Tracking of certifications, licenses and training data
- Tracking employee health and wellness
- Deploying online benefit enrollments for annual open enrollments, new employees, and qualifying status changes
- Enabling organization to create HR benefit, payroll benefit and payroll deduction records that are future dated

The goal is to automate and streamline the many manual and time-consuming processes that take up valuable time for HR and Payroll staff.

### **Employee Health and Wellness Manager**

Many organizations are required by law or industry to maintain accurate records pertaining to employee health and wellness. Typical employee data that needs to be maintained includes immunizations, vaccinations, health screening, lab work, physicals, and illness and workplace injuries. The data must be detailed and meet internal and external reporting needs. Specific examples include the following:

- Healthcare (Hospitals, Clinics, and Physician Groups) and Long-term Care facilities are required to track health and wellness information on employees to ensure that employees meet health standards for serving their patients and the public. Information that needs to be maintained includes annual lab work, physicals, x-rays testing, mantou (TB Skin test), and so on. Organizations that cannot or do not maintain this information can face severe and costly penalties.
- Many organizations require senior executives to have annual health screenings such as annual physicals and lab work, often in conjunction with “key man” life insurance policies that have been purchased to protect the organization in the event of an untimely death of an executive. Organizations need the ability to track this critical information, as well as plan for future tracking and scheduling.

The Employee Health and Wellness Manager in Advanced Human Resources enable comprehensive tracking for all employee immunizations, vaccinations and testing. In addition, users can track employee health-related follow-ups for an injury or illness. Along with full integration with Human Resources in Microsoft Dynamics GP, the Employee Health and Wellness Manager enables users to:

- Create and defines health and wellness categories, codes and results types that are specific to your organization
- Create and define health and wellness codes for use in injury and illness that are specific to your organization
- Develop and use templates that assign the various health and wellness codes to employees for informational, tracking, and reporting purposes
- Utilize the module reports and create ad hoc reports using SmartLists

By taking advantage of these capabilities, your organization can track employee health and wellness data in a way that meets unique needs. Advanced Human Resources also captures changes automatically and enables full historical views of testing, immunization or other health related records, helping ensure compliance with internal and external requirements. Specific benefits include the following:

- Time and money savings through efficient data management
- Reduced management workload
- Centralized and simplified record keeping in the HR System
- Efficient maintenance for detailed records of employee illness and workplace injury
- Fast, comprehensive reporting

## **Certification, License, and Training Manager**

Many organizations are required by law or industry requirements to maintain accurate records pertaining to employee certifications, licensing and training. At a moments notice, an organization may need to

determine if their employees have met the needed requirements in these areas. Non-compliance can result in financial penalties or sanctions. Specific examples of requirements include the following:

- Public sector employees are required to be certified, licensed, or trained to safely or legally perform their duties. Everyone from fire and police personnel to snow plow drivers need to retain current certifications, licenses and/or training to ensure their ability to serve the public. In general, it is the responsibility of the HR Department to ensure that employees meet requirements.
- Healthcare (Hospitals, Clinics, Physician Groups) and Long-Term Care facilities are required to track certifications, licensing, and training for all of their employees. For instance, these facilities hire physicians and nurses to staff their facilities. It is imperative that accurate and up-to-date license information be maintained and available at a moments notice. In addition, these types of facilities are also required to track training for the employees. Failure to maintain this information could result in problems with accreditation and result in financial penalties and sanctions.
- Organizations that are in the transportation business—airlines, railroad, trucking, bus lines, and so on—are required to maintain up-to-date information on certifications, licensing, and training for all employees. In many cases, specific licenses and certifications are required for employees that operate equipment. In addition, specific training is required to renew the required license and certification.

Within Human Resources in Microsoft Dynamics GP, employees can take training classes and workshops. Upon completion, the employee can have skills or a skill set assigned to them. The Certification, License, and Training Manager in Advanced Human Resources significantly increases the ability to track and manage critical employee information. These capabilities work in conjunction with the Human Resources module and can be quickly configured to meet specific needs.

Features and benefits for the Certification, License, and Training Manager in Advanced Human Resources include the following:

- Organizations can store and track unlimited certifications, licensing, and training data within the Human Resources database—including expiration and renewal dates for certifications and licenses.
- SmartLists can provide reports that meet internal and external needs and requirements.
- Organizations can maintain certifications, license and training requirements by department and position.
- Employees and managers can view personal certification, licensing, and training information through HRM Self Service Suite for Microsoft Business Portal.
- Changes are captured automatically, with tracking of full historical data for certifications, licenses and training.

## **Benefits Enrollment Manager**

All organizations, large and small, face the daunting task of enrolling eligible employees in the various benefit plans that are offered as a part of their employment:

- Most organizations have an “open enrollment period,” a window of time when employees can enroll or change their enrollments in various benefit programs, including medical, dental, vision, life, disability, and retirement. In many cases, the open enrollment period is scheduled prior to the start of the plan year; it is the time when employees are allowed to select coverage or make changes without a qualifying status change.
- New employees must be offered benefit coverage at the time of hire or when they are eligible for the coverage. This is ongoing and can be an enormous project to manage if the organization is growing and hiring a lot of employees.
- At the time of a qualifying status change, employees are given a 30–day window to make changes to many benefits. The following qualifying status changes are recognized:
  - Marriage
  - Divorce or legal separation
  - Death of a spouse or a covered dependent
  - A covered dependent is no longer eligible for coverage
  - Birth, adoption, or placement for adoption of a child
  - Spouse becomes employed/unemployed
  - Change in employee’s employment status
  - Other changes permitted by the IRS or state

Within each of these benefit enrollment periods, there is a tremendous amount of information that needs to be given to the employee. In addition, questions must be answered, forms completed, completed enrollment forms reviewed, data entered into HR and Payroll systems, insurance carriers notified. The process involves a lot of work and the risk of costly errors and omissions. Many of the steps are labor-intensive and handled on a manual basis. It is estimated that benefit enrollment and related issues take up to 25 percent of time spent at work by HR and Payroll staff. The Benefits Enrollment Manager in Advanced Human Resources delivers functionality that automates and streamlines these processes.

Benefits Enrollment Manager leverages the Windows SharePoint Services platform and Microsoft Business Portal to enable quick deployment for Web-based benefit enrollment, regardless the size of your organization. Your organization can gain efficiency and control over annual open enrollment and for new hires and for employees that have a qualifying status change.

Tight integration with the Human Resources module ensures that benefit elections are automatically transferred to Human Resources, helping eliminate paper-based systems and reduce data entry. Features and benefits include the following:

- Organizations can utilize this tool for annual open enrollment, new employee enrollment and employees that experience a qualifying status change.
- Flexible configuration allows an organization to define benefit options and then assign to the appropriate group of employees
- Benefits enrollment includes step-by-step wizards that guide employees through the benefit selection process

- Benefits enrollment capabilities integrate with HRM Self Service Suite for Business Portal and Human Resources modules.
- A seamless integration allows for rapid deployment and improved productivity.
- Organizations can create quickly create reports using SmartList reporting tools.

## **Benefits Lifecycle Manager**

Setting up benefit enrollments in HR and Payroll systems is time-consuming and requires dedication and time from both HR and Payroll staff. Often, the window for data entry is tight—for example, all transactions may need to be updated for the first payroll run following the effective date.

With the Benefits Lifecycle Manager in Advanced Human Resources, organizations can manage benefits enrollments efficiently, using that integrates with Human Resources and Payroll modules. Benefits lifecycle management capabilities enable organizations to create HR benefit, payroll benefit and payroll deductions setup records for enrollment purposes. The same benefit codes can be used from year to year, with benefit information updated during enrollment.

Benefits Lifecycle Manager offers a seamless solution for conducting open benefit enrollments, new employee benefit enrollments, and qualifying status changes. In addition, transactions can be created in advance and stored until they are effective. Features and capabilities enable users to:

- Create future-dated records for Health, Life/Disability, Retirement, and Miscellaneous deductions
- Create the corresponding payroll interface
- Activate the records at the appropriate time
- Track history of previous benefit records
- Make pending changes available to benefits enrollment manager for informational and enrollment purposes.

## **Conclusion**

Microsoft Dynamics GP now offers a new module, Advanced Human Resources, that can enable HR professionals and staff to strategically track and manage employee health and wellness; certifications, licensing, and training; and Web-based enrollment for benefits programs. Along with sharing the familiar look and feel of Microsoft Dynamics GP, Advanced Human Resources integrates tightly with the Microsoft Dynamics GP solution, helping reduce training time, increase productivity, and deliver a faster return on investment.



Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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