

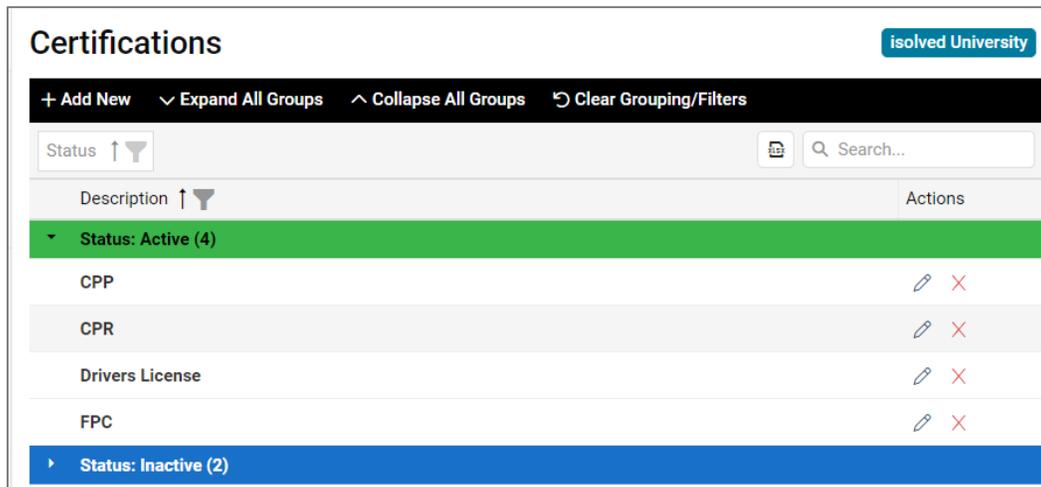
## Overview

The Human Resource (HR) screens in isolved offer a tracking mechanism that provides valuable insights for effective employee management. These HR screens can store information about employees' certifications. This data is accessible to employees, managers, supervisors, and HR administrators via Employee Self-Service. With easy access to performance data, managers can make informed decisions regarding job changes, promotions, and evaluations.

To get started, navigate to **Client Management > HR Management > Training and Development > Certifications** and enter the HR data that is most important to your business.

## Create a List of Company Certifications

What types of certifications do your employees hold? When should they be re-certified? Add each of the certifications that an employee may earn at your company. This list then becomes a drop-down where you can make selections for each employee. You may add new items to the list at any time.



1. Click **Add New**.
2. Enter a name for the certification in the **Description** field.
3. Click **Save**.

**Note:** If **Inactive** is selected, the description does not appear in the **Employee Certification** drop-down menu.

## Email Alerts

Employees, managers, or administrator users may be notified by email when the employee's certification is ready to expire or has recently expired. Select the **Email Alerts** tab.

- Using the certification email alerts feature is not a requirement for certifications.
- Certification email alerts generate daily at 5 p.m. ET.
- The expiration date on the employee's certification screen determines when email alerts are generated based on parameters you create on the **Email Alerts** tab.
- Alerts do not generate for inactive employees.
- Email templates need to be created for the certification email alerts.
- Multiple emails can be sent for each certification (see screenshot).

**Note:** To create an email template or a Client User Group, navigate to **Client Management > Workflow Setup > Client User Group** and Email Templates.

Certifications
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Save
← Go Back to List

**Certification**

\* Description

Active

**Email Alerts**

* Send this email	* To this user type	User group	This number of		Actions
			days	Send date option	
Certification Expiring	Employee		30	Before expiration date	...
Certification Expiring	Employee		14	Before expiration date	...
Certification Expiring	Employee		7	Before expiration date	...
Certification Expiring	Employee		3	Before expiration date	...
Certification Expired	Assigned Manager		3	Before expiration date	...

[+ Add New](#)

- **Send this email:** This is a drop-down list of all certification email templates.
- **To this user type:** There are four user types: “Employee,” assigned or organizational, “Manager,” assigned or organizational, “Supervisor,” and “Client User Groups.”
  - **Employee:** The email is sent to the employee.
  - **Manager:** The email is sent to the employee’s manager.  
**Note:** No email is sent if the employee doesn’t have a manager assigned.
  - **Supervisor:** The email is sent to the employee’s supervisor.  
**Note:** No email is sent if the employee doesn’t have a supervisor assigned.
  - **Client User Groups:** The email is sent to every client user within the client user group.
- **User group:** The drop-down lists all Client User Groups and is only available if your chosen user type was created under **Client User Groups**.
- **This number of days:** This field allows you to enter the number of days before and after the expiration date that you wish the email to be sent.
- **Send date option:** This drop-down menu allows you to select the days “Before Expiration Date” and days “After Expiration Date.”

## Recording Employee Certifications

Navigate to **Employee Management > Human Resources > Training and Development > Certifications**.

1. Click **Add New**.
2. Select the **Certification** from the drop-down (required).
3. Add **Authority** (optional).
4. Enter the **Effective Date** (optional).
5. Enter the **Expiration Date** (required if you use the email alert).
6. Enter **ID Number & Total Cost** (optional).
7. Add **Employee Reimbursement** information, if desired. This does not automatically pay the employee.
8. Click **Save**.

A history of all employee certifications is maintained at the top of the screen.

Certification	Effective Date	Expiration D...	Authority	ID Number	Total Cost	Reimbursement...	Approval Date	Reimbursement ...	Comments	Actions
Drivers License		04/22/2025	Florida	B321654987321						
CPP	02/12/2024	02/01/2027	APA		700.00	350.00	03/01/2024	03/08/2024		

## Reports

Navigate to **Reporting > Client Reports** and select the **HR Reports** category or filter for the appropriate report name.

- Select "HR Reports" for **Report Category**.
- "Employee Certification History Report" provides all certifications entered within the date range or by payroll run.

## Employee Admin Tools

For additional information on using the **Certifications** analytic tool, please refer to the article [Employee Analytics - Certifications](#).

Certifications							
<span>Expand All Groups</span> <span>Collapse All Groups</span> <span>Clear Grouping/Filters</span>							
Drag a column header here to group by that column							
Employee Na...	Employee ID	Status Description	Certification				
			Authority	Title	ID Number	Effective Date	Expiration Date
Daniel L Adams	1004	Active	APA	CPP		7/16/2020	12/31/2024
Linda Brown	1080	Active	APA	CPP		2/12/2024	2/1/2027
Daniel L Adams	1004	Active	NY	Drivers License	NY15666688	8/27/2019	8/26/2024
May Alexander	1066	Active	Florida	Drivers License	A123456789	8/1/2022	8/1/2027
Tyler Franklin	10010	Active	Michigan	Drivers License	F14712415417475	6/5/2022	6/5/2026
Julius Morgenson	10000	Active	California	Drivers License	M541214587451	5/4/2022	5/4/2026
Karen Pennington	10003	Active	Michigan	Drivers License	P1214547845124551	5/4/2020	5/4/2025
Kris T Pretender	10007	Active	Florida	Drivers License	P147258369	5/1/2021	5/1/2026
Alice Thompson	1095	Active	New York	Drivers License	T560 8815 236 1457	8/5/2021	8/5/2025
Ronald Hughes	1016	Active	Project Managem...	IAPM		6/13/2019	6/13/2024

## Report Writer

Navigate to **Reporting > Report Writer** to create a custom report for HR subjects. All data stored for the HR topics is available in Report Writer, allowing you to create a custom report. The report can pull multiple entries to reflect all the employees' records.

### Report Options

\*Report Type:

\*Sub Report Type:

\*Report Title:

Font Size:

Font Face:

Report Orientation:

Report Group:

Description:

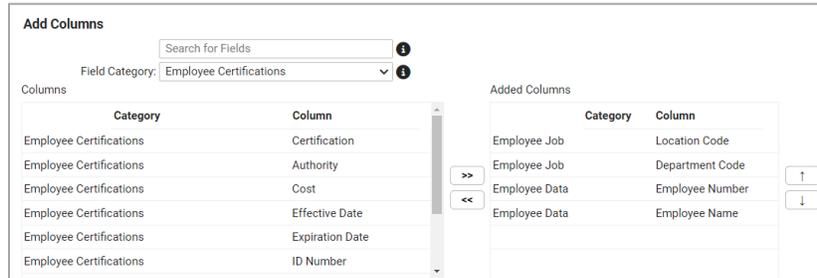
Totals Only Summary Report

1. Click **Add New**.
2. Select **Report Type**: "HR Report."
3. Select **Sub Report Type**: "Certification Report."
4. Select a **Report Title**.
5. Select a **Font Size** and **Font Face**.
6. The **Report Orientation** defaults.
7. Select a **Report Group** (if a particular group is needed, contact your Service Bureau).
8. Click **Save**.
9. Add Columns

Help Docs

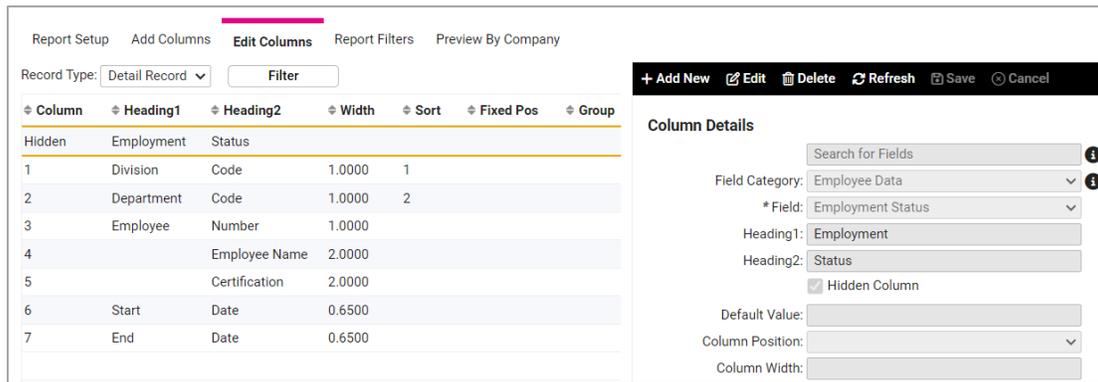
10. Select the **Field Category** from the drop-down (e.g., “Employee certifications” or “Employee Status”).
11. In the **Column** area, highlight the column headers that should be included and use the >> and << arrow keys to move them in and out of the report.
12. **Save.**

**Note:** You can sort the columns using the arrow keys next to the added columns.



Edit Columns

- Columns can be edited to change the width, alignment, position, sort, and value, depending on the user’s needs.
- Click **Save** when editing is complete.

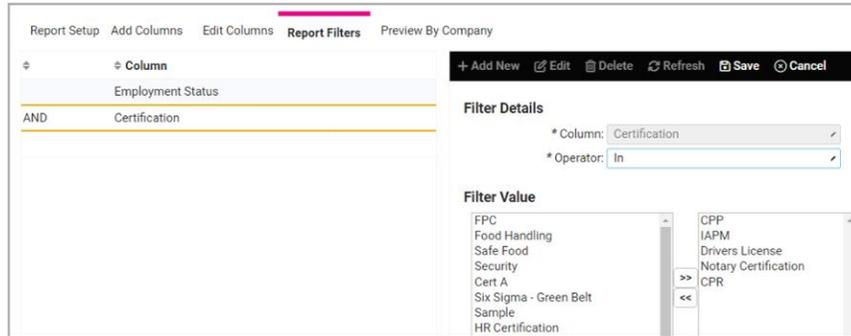


You may change any of these fields now or return to these choices after printing the report. After you have saved the report, additional tabs are available to you to create the report.

See the article, [Report Writer Users Guide](#), in the isolved University Library for additional information on Report Writer functionality.

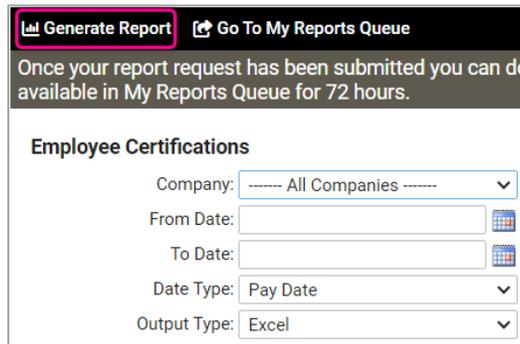
Report Filters

- Report filters can be set on the column for a specific filter value. For example, the “Employment Status” column can filter “Active” employees.
- Click **Save** when filters are completed.



### Preview by Company

1. Choose the desired **Company**, **From Date**, **To Date**, **Date Type**, and **Output Type** for the report.
2. Click **Generate Report**.
3. Click **Go To My Report Queue** and view the report.



	A	B	C	D	E	F	G
1	Division Code	Department Code	Employee Number	Employee Name	Certification	Start Date	End Date
2	01	50	1080	Brown, Linda	Drivers License	4/22/2021	4/22/2025
3	01	50	1080	Brown, Linda	CPP	2/12/2024	2/1/2027
4	02	20	10000	Morgenson, Julius	Drivers License	5/4/2022	5/4/2026
5	02	50	1035	Brown, Mary	CPP	5/1/2022	5/1/2025
6	03	20	1004	Adams, Daniel L	CPP	7/16/2020	12/31/2024
7	03	20	1004	Adams, Daniel L	Drivers License	8/27/2019	8/26/2024
8	03	20	1004	Adams, Daniel L	Notary Certification	5/1/2020	5/1/2024
9	03	70	1016	Hughes, Ronald	IAPM	6/13/2019	6/13/2024
10	07	40	1066	Alexander, May	Drivers License	8/1/2022	8/1/2027
11	07	40	10010	Franklin, Tyler	Drivers License	6/5/2022	6/5/2026
12	07	50	10003	Pennington, Karen	Drivers License	5/4/2020	5/4/2025
13							