Overview

The Human Resource (HR) screens in isolved provide a tracking mechanism for managing employees effectively. The HR data stores information about corrective actions. The data can be available to the employee, manager, and HR admin through self-service. When the data is easily accessible, managers can accurately make job changes, promotions, or performance evaluation decisions.

To get started, enter the HR data that is most important to your business under **Client Management > HR Management**. All the HR screens have corresponding reports, and the data is also available in the report writer, which allows for custom reporting.

Corrective Actions

How does your company keep track of corrective actions for employees? To build corrective actions, begin by creating a list of occurrences in the system on the **Corrective Actions** screen. Adding each of the occurrences that may occur creates a list where you can make selections that apply to your employees. You may add/update the list at any time.

Note: The **Corrective Actions** screen is covered in more detail later in the article.

Occurrences tab

To create a list of occurrences that apply to your company, follow these steps:

1. Navigate to **Client Management > HR Management > Performance > Corrective Actions**
2. Select the **Occurrences** tab
3. Click **Add New**
4. Enter the **Occurrence** type
5. Click **Save**

If you need to make any changes or edit an existing occurrence select the **Edit** icon to the left of the occurrence title. Here is also where you can use the toggle to make an occurrence **Active** or **Inactive**. If an occurrence is switched to **Inactive**, it is then excluded from the picklist but still preserves historical reporting.

Actions Taken tab

Actions Taken is the next step in building the corrective actions. In this step, the table of actions is created, and alerts are tied to each one as needed. To create the list, follow these steps:

1. Select **+ Add New**.
2. Enter the title in the **Action Taken** field.
3. The action is marked as **Active** by default.
4. Attach **Email Alerts** by following these steps:
    a. Select **+Add Email**
    b. Fill in the fields as needed
    c. When finished, select **Done**.
    Note: You can add as many **Email Alerts** as needed for the client.
5. Select **Save**.
6. Select **Go Back to List**.

Authority tab

An authority is a role within your company that can enforce the organization's rules (i.e., managers or supervisors). Authorities need to be set up before setting up occurrences. Adding each authority into the system creates a drop-down that can be used within the employee's corrective actions record.

To add authorities within your company to enforce corrective actions, follow these steps:

1. Navigate to **Client Management > HR Management > Performance > Corrective Actions.**
2. Click **Add New**.
3. Enter the **Authority**.
4. Click **Save**.

Occurrences on Employee Records

The **Employee Management > Human Resources > Performance > Occurrences** screen contains all occurrences that have been manually added or imported.

The items in the list can be grouped, filtered, sorted, and exported to a spreadsheet. Fields on the list include:

- **Actions**: To edit the occurrence, select the edit (pencil) icon. To delete an occurrence, select the trashcan icon.
- **Occurrence Type**: This displays the title of the occurrence.
- **Occurrence Date**: This displays the date of the occurrence.
- **Policy Status**
- **Description**: This field displays the description of a manually added occurrence.
- **Notes**: this field displays any notes for a manually added occurrence.

Note: If your company is using the Occurrence Tracking service, additional columns for **Policy**, **Points**, and **Point Reset Date** display.

To manually add a new occurrence, follow these steps:

1. Select **+Add New**.
2. Use the drop-down list to select a **Type of Occurrence.**
3. Enter **Occurrence Date (optional).**
4. Select the correct **Policy** (if applicable).
5. Enter a **Description** with details about the incident.
6. Enter any applicable **Notes.**
7. Click **Save**.

Adding/Editing Corrective Actions

The **Corrective Actions** screen includes all actions manually added to an employee. Like the **Occurrences** screen, the list can be sorted, filtered, grouped, and exported to a spreadsheet. The columns include:

- **Actions**: To edit an existing corrective action, select the **Edit** (pencil) icon. To delete an existing corrective action, select the trashcan icon.
- **Action Taken**: Displays the action that was taken
- **Action Taken Date**: Displays the date that the action was taken. This may be different from the actual date of occurrence.
- **Authority**: This shows the authority that issued the corrective action.
- **Occurrence Type**: Displays the type of occurrence.
- **Occurrence Date**: The date of the occurrence.
- **Corrective Action Notes**: Displays a preview of the notes for the action.

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Adding a Corrective Action

To manually add a corrective action, follow these steps:

1. Click **+Add New**.
2. **Occurrence**: Use the drop-down list to select an existing occurrence or select **Add New**.
   Note: If **Add New** is selected, additional fields display allowing you to enter a new record. If an existing occurrence is selected, **Action Taken**, **Action Taken Date**, **Authority**, and **Notes** are the only fields that can be edited.
3. Regardless of the selection you make, fill in as much information about the occurrence as possible.
4. Click **Save**.

Editing/Deleting an Existing Corrective Action

To edit an existing corrective action, follow these steps:

1. Select the **Edit** (pencil) icon in the **Actions** column for the corrective action that you wish to edit.
2. Enter any needed changes.
   Note: When editing an existing corrective action, you can only edit the **Action Taken Date**, **Authority**, and **Notes**.
3. Click **Save** when finished.

The pencil icon also displays details about each record. The corrective actions record generated automatically by points accumulation includes all details of points incurred that led to the action.

To delete an existing corrective action, select the trashcan icon in the **Actions** column next to the corrective action that you wish to remove.

Note: The trashcan icon is only available for manually entered records.

Reports

The "Employee Corrective Action Report" provides all employee offenses within a selected date range. To generate this report, navigate to **Reporting > Client Reports**, and use the **Report Category** filter and/or the **Search** function to find the "Employee Corrective Action Report".

Report Writer

Most fields from the **Corrective Action** screen are available for custom reports through **Report Writer**. To create the "Corrective Action Report" using the **Report Writer** screen, follow these steps:

1. Navigate to **Reporting > Report Writer.**
2. Select **+Add New**.
3. **Report Type**: Select "HR Report" from the drop-down.
4. **Sub Report Type**: Select "Corrective Action Report" from the drop-down.
5. Enter the **Report Title** (required).
6. Select the **Font Size** and **Font Face** (optional).
7. Select the **Report Orientation**: The default selection is "Landscape" but can be changed to "Portrait".
8. Select a **Report Group**.
9. Click **Save**.

For additional information about **Report Writer**, please view the [Report Writer User's Guide] in the University.