COVELLI HR SYSTEM NAVIGATION TIPS

1. Use the back arrow at the top left hand corner of the screen to exit and return to previous screen
2. Use the 'tab' key to move to the next field or use the mouse.
3. Use the arrow keys on the keyboard to move up and down

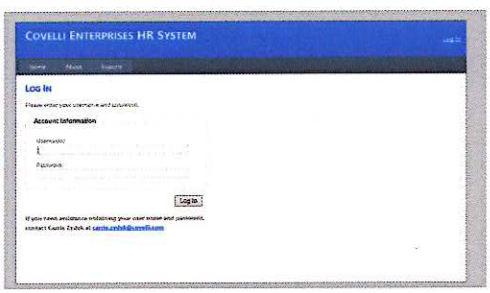
CAFÉ WEB ACCESS

To log on to the Covelli HR System

1. Click on the Store HR icon on the E-Learning computer (or use http://portal1.covelli.com/ when using the office computer)

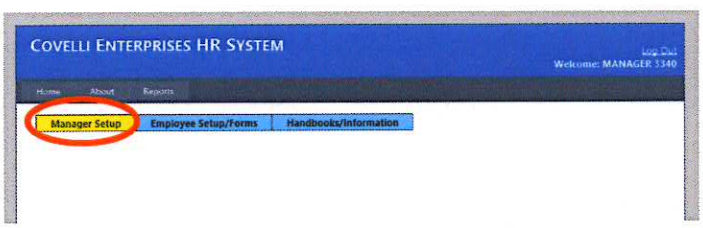
2. Click Log in at the top right corner

3. Log in with the same ID and password for the Covelli Management Web Reports



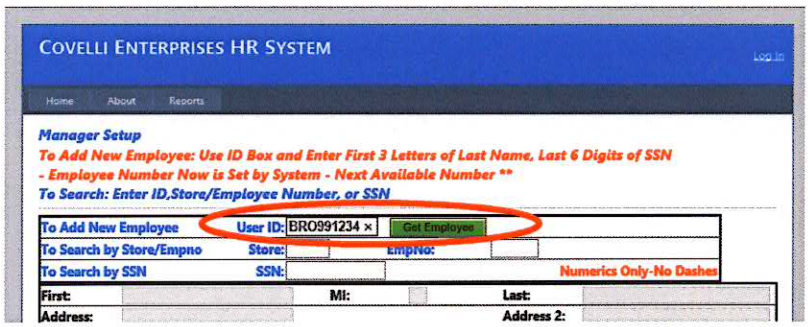
TO SET UP A NEW HIRE

1. Click on Manager Set Up



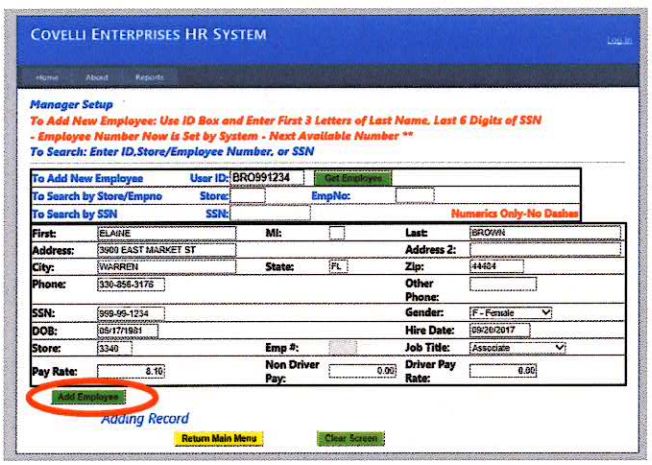
2. Enter your Covelli Web Reports Password again (same as log in)

3. Enter the new hires User ID (use the first 3 letters of their last name and the last 6 digits of their social security number) **AND** click Get Employee

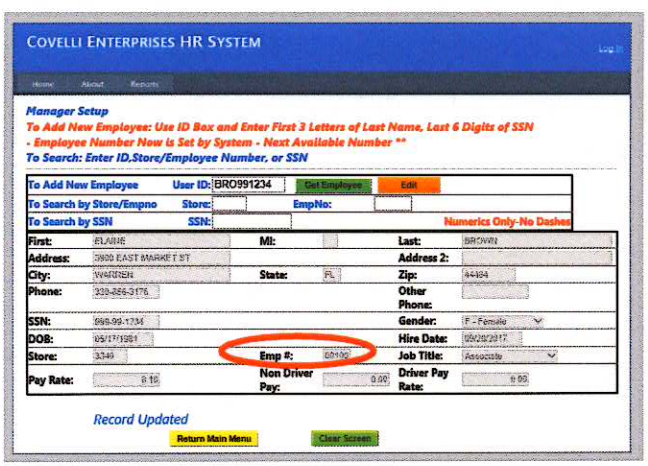


4. If the employee is already in your system the record will display, otherwise the fields will open up for you to key in all the required information. Key in the name, address, phone number, social security number, gender, birthday, hire date, café number (this field will auto fill), job title and pay rate. (skipping over the emp. number) THEN CLICK ADD EMPLOYEE

BE VERY CAREFUL WHEN KEYING IN THIS INFORMATION (THIS GOES STRAIGHT TO THE PAYROLL SYSTEM) – DOUBLE CHECK YOUR DATA ENTRY.



5. After you click Add Employee, the fields turn grey and the Employee Number appears in the box. WRITE THAT NUMBER DOWN.

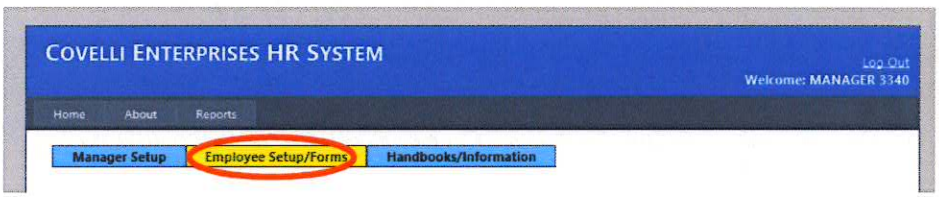


Your newly hired employee is now set up in the HR system and within ½ an hour will be loaded directly into the payroll system at the office. It will now get picked up from payroll in the file that is sent to the corporate office and sent back down to your BOH system for the employee to be able to clock in. (that process takes about 4 hours)

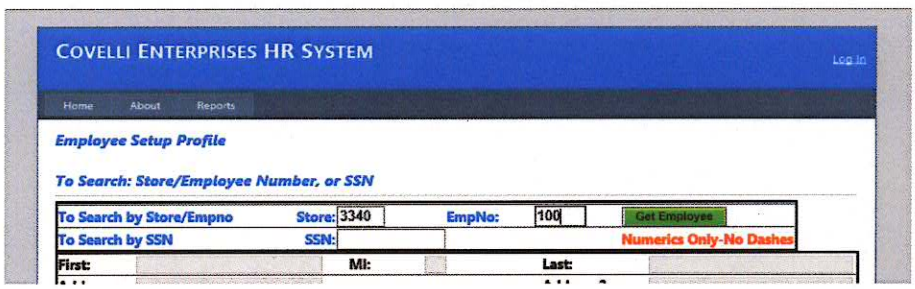
TO COMPLETE THE EMPLOYEE ORIENTATION

You've already done the manager set up for the employee, so they should be in your system and able to clock in. On their first day of work, they must complete and sign all of the required documents in the HR System. First you follow the steps above to log in.

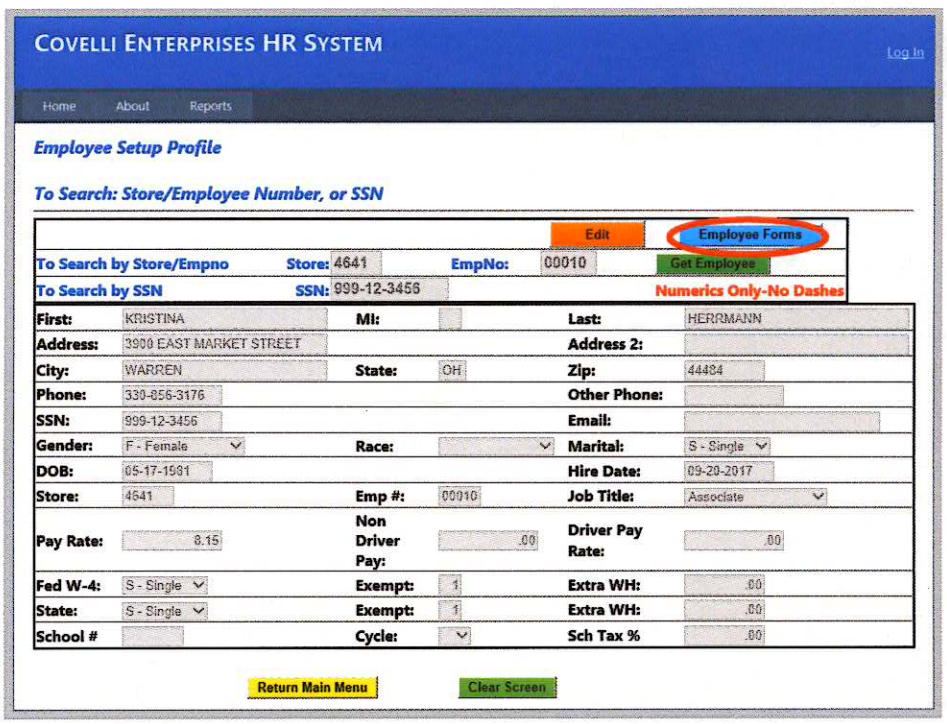
1. This time you will choose the Employee Setup/ Forms tab



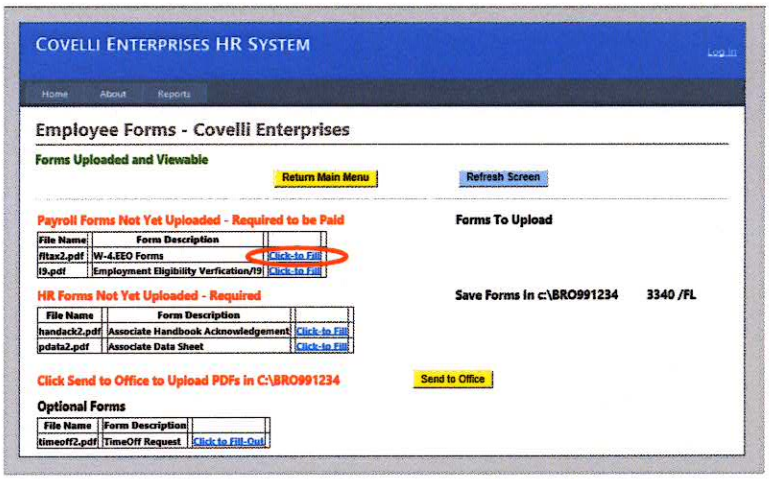
2. In the search box, key in your café number and the employee number that you wrote down – or you can search by his/her social security number. Then Click Get Employee.



3. The record for the employee that you searched for will come up. Have the employee (that is now sitting with you) verify that all of this information is correct. Edit the fields if necessary and complete the tax information at the bottom. THEN CLICK THE BLUE BUTTON ON RIGHT CORNER – EMPLOYEE FORMS

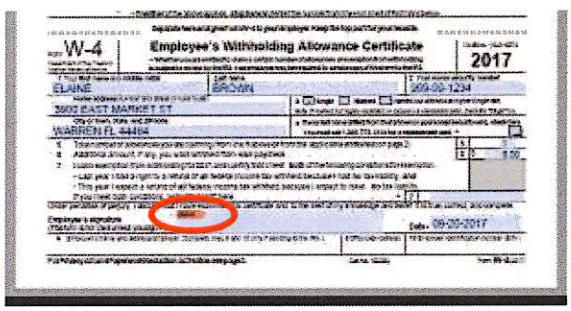


4. The available forms are now listed. The top section "Payroll Forms Not Yet Uploaded – Required to be Paid" must be filled out and signed on their first day of work. Beside the W4, EEO Form, click on the "CLICK TO FILL"

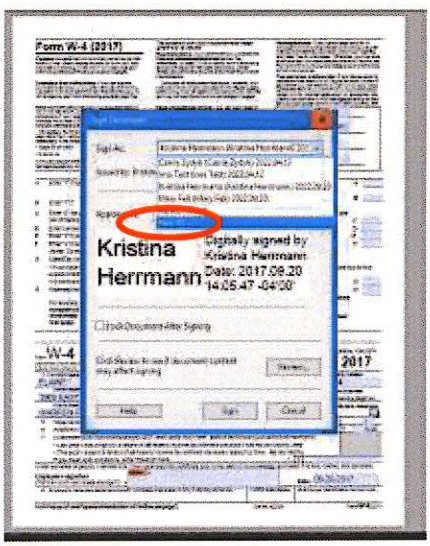


5. The W4 and EEO forms will display on the screen to be completed. A lot of the form is auto-populated from the information you have already provided. After the employee looks over the form and makes any changes – they now need to sign it. For this first form you will need to create a digital ID signature.

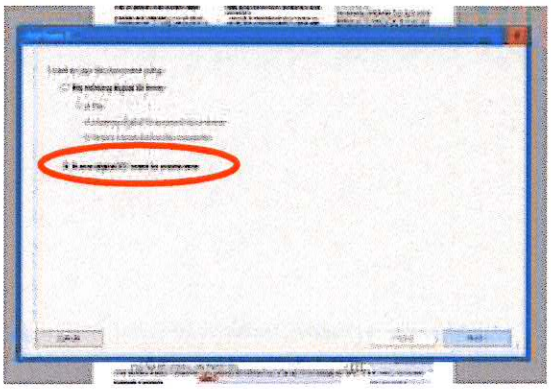
Click the red arrow inside the signature box.



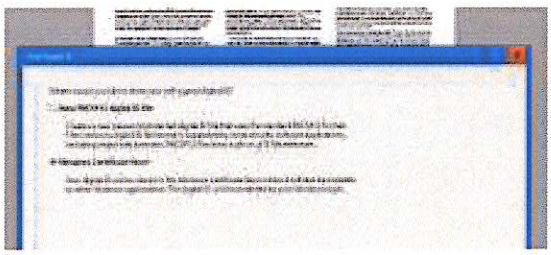
6. Click NEW ID



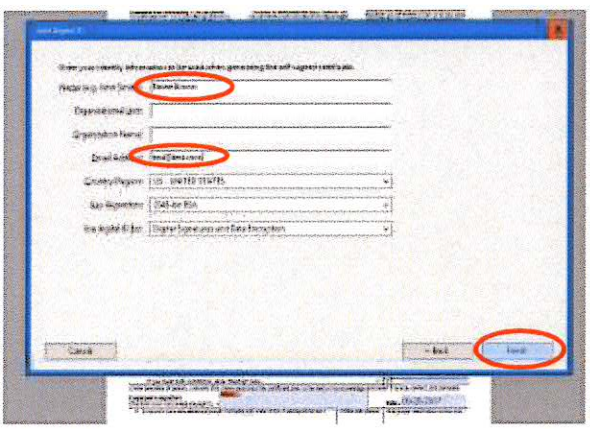
7. Choose New Digital ID (I want to create now) Click NEXT



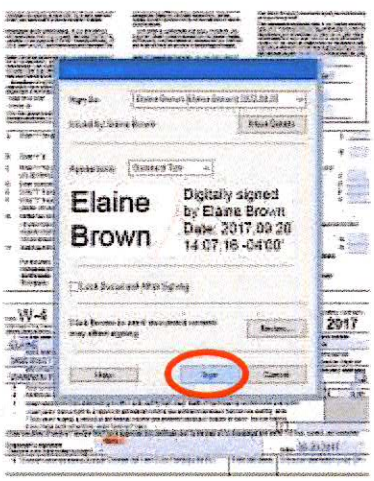
8. Choose Windows Certificate Store



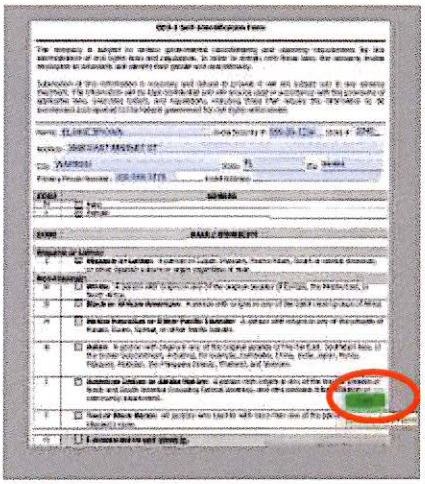
9. Fill in the employees' full name and email address and CLICK FINISH



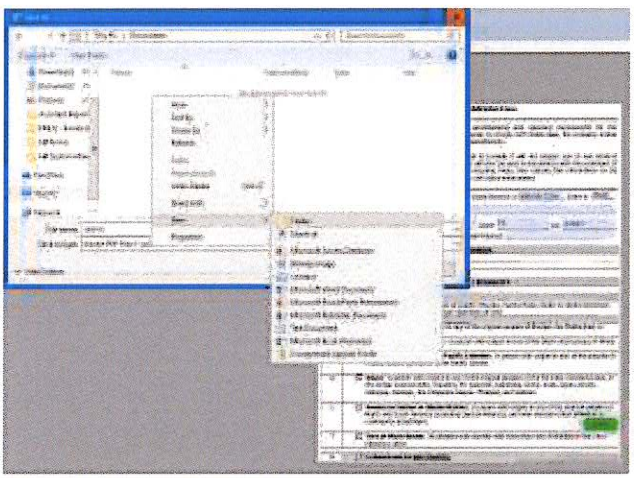
10. That employee will now be a choice in the "Sign As" drop down box and he/she can click sign.



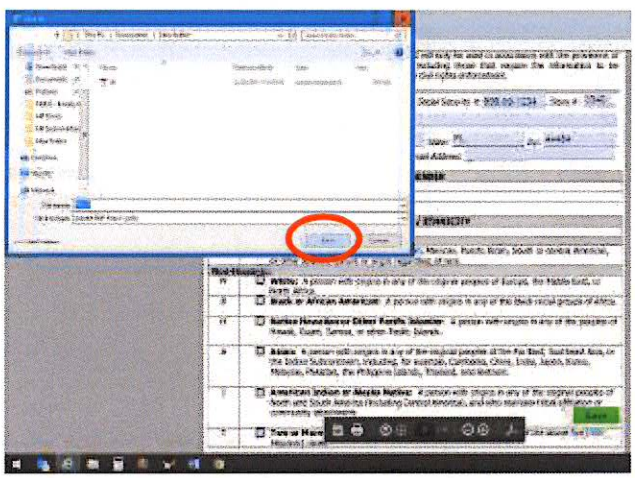
11. The employee then needs to scroll down and complete the EEO form. Then CLICK SAVE



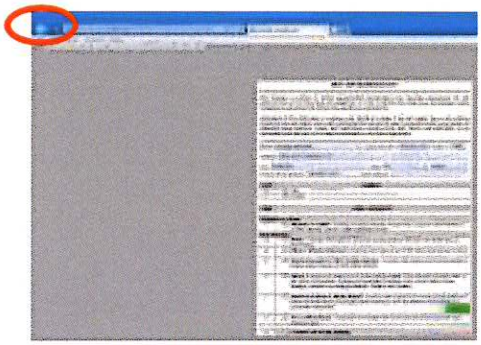
12. The Documents folder will open up. Create a new folder by right clicking your mouse and go to New, then Folder.



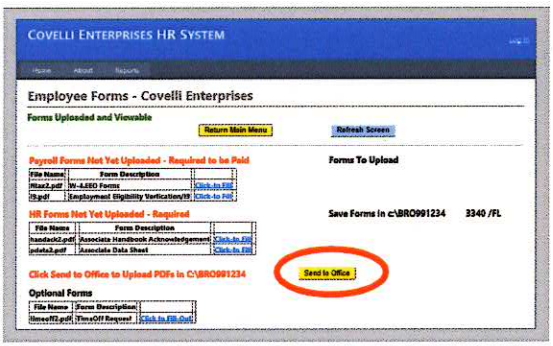
13. Double click on the "new folder" to open it.
14. Click SAVE (DO NOT CHANGE THE NAME OF THE FILE)



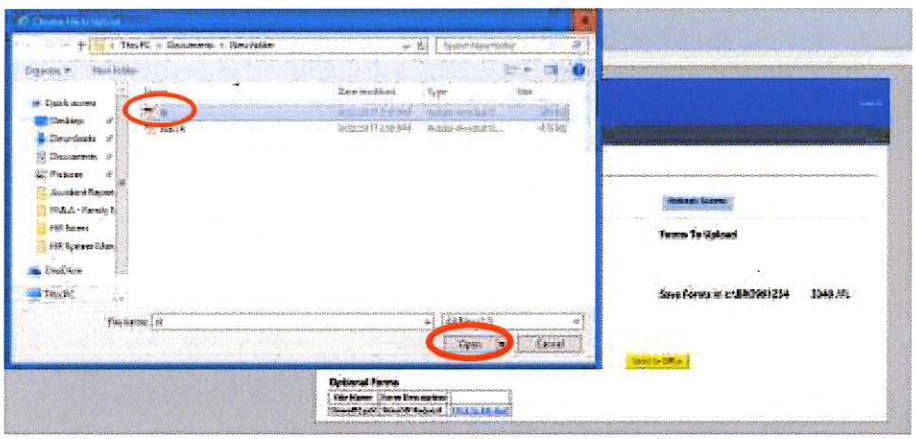
15. Now that the form has been completed and saved, click the BACK BUTTON on your web browser at the top left corner of your screen.



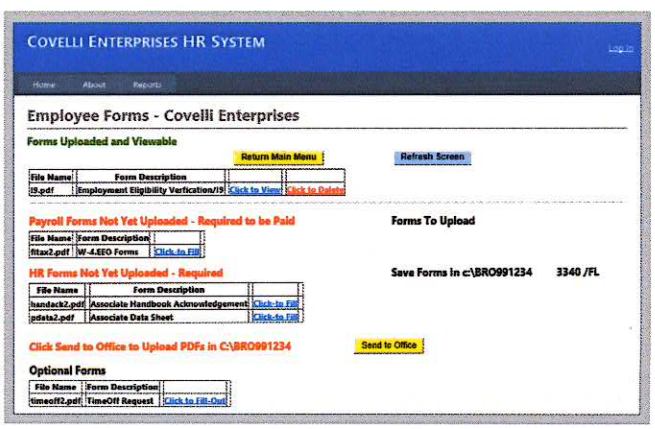
16. To submit the form, click the yellow "send to office" button.



17. The Documents folder will open. Choose the form that you want to send. Click open.

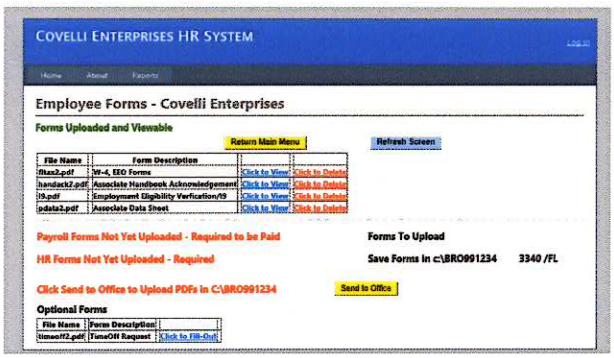


The form that you "sent to the office" then appears in the top section "Forms Uploaded and Viewable."



18. Continue those steps to complete, sign and submit all of the required documents. Upon completion they will all be listed under the Green section "Forms Uploaded and Viewable."

The orientation is now complete.



Important things to Remember:

- For transferred employees – Fill out a transfer form PRIOR to the employee starting at your café. Scan and email the form (DO NOT FAX) to Elaine Hofmann with all the correct information (café numbers and dates). She will transfer the employee in the payroll system and then respond to your email with the new employee number. You then can enter that employee into the BOH using the number she gave you.
- Rehired employees – DO NOT PUT THEM IN THE HR SYSTEM. Fill out a profile change form, write REHIRE on the form and list the date. Scan and email the form to Elaine Hofmann and she will reactive the employee in the payroll system.
- Please be VERY careful with your data entry in the HR system. This information now goes directly into the payroll system so names, socials, rates etc. MUST be accurate!
- Corporate ID format is the 4 digit café number and a 5 digit employee number. (example 331000035)
- Cafes that have school or local tax – you need to continue to use the links on the HR System to fill in the percentages and codes.