



# Client Training Summarized Course Descriptions

Program Content (Course Description)	Objectives (Tasks)	
<b>Understanding Your ADP Workforce Management Solution</b>		
<p>This course introduces participants to the purpose and benefits of their specific ADP solution, how data can be accessed via the ADP Portal, and how information is shared among the solution's components.</p>	<ul style="list-style-type: none"> <li>Describe the purpose and benefits of their specific ADP solution</li> <li>Identify the benefits of a single sign-on through a portal</li> <li>Explain how employee data flows from the system of record to another component</li> </ul>	
<b>Getting Started with HR/Benefits Solution</b>		
<p>This course introduces participants to the features, benefits, structure, and data of ADP's HR/Benefits Solution. Topics include the functions of the product, an overview of the data structure, and an introduction to the pages and product layout.</p>	<ul style="list-style-type: none"> <li>Identify the key features and advantages of HR/Benefits Solution</li> <li>Describe the HR/Benefits Solution functions available to administrators, managers, and employees</li> <li>Describe your company's corporate structure in HR/Benefits Solution</li> </ul>	
<b>Introduction to Virtual Classroom</b>		
<p>This course introduces participants to the virtual classroom interface. Topics include interacting with the instructor and other participants and managing breakout rooms for independent practices.</p>	<ul style="list-style-type: none"> <li>Use Centra virtual classroom tools to raise your hand, indicate a yes or no response, and gain control of a feature or application</li> </ul>	<ul style="list-style-type: none"> <li>Confirm your connection to the Centra virtual classroom server and your ability to communicate using virtual classroom tools</li> </ul>
<b>Company and HR Setup for HR/Benefits Solution</b>		
<p>This course prepares participants for some of the decisions they must make to implement features that are foundational to the use of HR/Benefits Solution. Participants will learn how to define the corporate structure, define the HR structure, determine custom settings, and set up secondary HR users.</p>	<ul style="list-style-type: none"> <li>Create a corporate group</li> <li>Define employee identification settings</li> <li>Configure the Add Employee Wizard</li> </ul>	<ul style="list-style-type: none"> <li>Edit a salary structure and define a job</li> <li>Set up an administrative user</li> </ul>
<b>Employee Maintenance and Reporting for HR/Benefits Solution (before 6/15/09)</b>		
<p>This course prepares participants to enter, retrieve, and process employee data using HR/Benefits Solution. Topics include hiring and terminating employees; changing an employee's job and status; enrolling employees and dependents in benefits; processing employee requests; creating point-in-time, historical, invoice, turnover, and analytical reports; connection overview; and archiving and deleting employee records.</p>	<ul style="list-style-type: none"> <li>Enter a new hire</li> <li>Enter dependents, beneficiaries, and benefit enrollments</li> <li>Change an employee's job</li> <li>Change an employee's status</li> <li>Enter benefit changes due to a life event</li> <li>Archive and delete employee records</li> <li>Process self-service requests</li> </ul>	<ul style="list-style-type: none"> <li>Create point-in-time reports</li> <li>Compare data using comparison and change reports</li> <li>Run historical and turnover reports</li> <li>Produce statement and invoice reports</li> <li>Summarize data with analytical reports</li> <li>Provide data to ADP payroll products and carriers</li> </ul>
<b>Employee Maintenance and Reporting for HR/Benefits Solution (on or after 6/15/09)</b>		
<p>This course prepares participants to enter, retrieve, and process employee data using ADP's HR/Benefits Solution.</p>	<ul style="list-style-type: none"> <li>Navigate Employer Access</li> <li>Enter a new hire</li> <li>Change an employee's job</li> <li>Change an employee's status</li> <li>View historical Information</li> </ul>	<ul style="list-style-type: none"> <li>Archive, restore, and delete employee records</li> <li>Create custom report templates</li> <li>Create point-in-time, change, and analytical reports</li> </ul>



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<b>Managing Employee Records for HR/Benefits Solution (before 6/15/09)</b>		
This course prepares participants to use HR/Benefits Solution to hire and terminate employees and perform other personnel actions.	<ul style="list-style-type: none"> <li>Hire a new employee</li> <li>Edit employee information</li> <li>Record a job change</li> </ul>	<ul style="list-style-type: none"> <li>Terminate an employee</li> <li>Archive and delete employee records</li> </ul>
<b>Managing Benefit Enrollments for HR/Benefits Solution (before 6/15/09)</b>		
This course prepares participants to enter and maintain benefit enrollments in HR/Benefits Solution and to generate invoices for carrier reconciliations.	<ul style="list-style-type: none"> <li>Enroll employees into appropriate benefit plans</li> <li>Enter benefits changes due to work and life events</li> <li>Generate invoices of benefit premiums</li> </ul>	
<b>Managing Benefit Enrollments for HR/Benefits Solution (on or after 6/15/09)</b>		
This course prepares participants to enter and maintain benefit enrollments in HR/Benefits Solution and to generate invoices for carrier reconciliations.	<ul style="list-style-type: none"> <li>Enroll employees into appropriate benefit plans</li> <li>Enter benefits changes due to life events</li> </ul>	
<b>HR/Benefits Solution and Pay eXpert Dataflow</b>		
This course prepares participants to use the features of ADP's HR/Benefits Solution and Pay eXpert. Topics include working with payroll connection files and dataflow features.	<ul style="list-style-type: none"> <li>Determine when the data flows from HR/Benefits Solution to Pay eXpert</li> <li>Verify the dataflow in HR/Benefits Solution and Pay eXpert</li> </ul>	
<b>Connecting HR/Benefits Solution and ADP PC/Payroll</b>		
This course prepares participants to download payroll connection files from HR/Benefits Solution, import connection data to the ADP payroll application, review import logs, and verify employee data.	<ul style="list-style-type: none"> <li>Download a payroll connection data file from HR/Benefits Solution</li> <li>Import a connection data file to ADP PC/Payroll</li> <li>Review import logs and verify employee data</li> </ul>	
<b>Employee Maintenance Workflows for HR/Benefits Solution and Pay eXpert (Recorded Webcast)</b>		
This course prepares participants to identify and create employee maintenance workflows between HR/Benefits Solution and Pay eXpert.	<ul style="list-style-type: none"> <li>Identify proper employee maintenance workflow procedures</li> <li>Create company-specific workflows</li> </ul>	
<b>Benefits Setup for HR/Benefits Solution</b>		
This course prepares participants for decisions they must make when analyzing benefit plans for HR/Benefits Solution. Participants will learn the plan types supported, how corporate structure affects eligibility, and the basics of plan setup.	<ul style="list-style-type: none"> <li>Identify important considerations for setting up benefit plans in HR/Benefits Solution</li> <li>Set up providers</li> <li>Set up benefit plans</li> <li>Edit benefit plans</li> <li>Terminate benefit plans</li> </ul>	



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<b>Open Enrollment for HR/Benefits Solution Webinar (Live Seminar)</b>		
<p>This course prepares participants to use HR/Benefits Solution to manage their open enrollment activities. Topics include implementing benefit plan changes, managing employee enrollments, and setting up Employee Access for open enrollment. This course also provides the opportunity for participants to ask questions during the webinar.</p> <p><b>Important Note:</b> Attend this live webinar prior to your first open enrollment using ADP's HR/Benefits Solution.</p>	<ul style="list-style-type: none"> <li>Identify the tasks you need to perform in HR/Benefits Solution before, during, and after open enrollment</li> <li>Use the tools and resources available to help you complete your open enrollment tasks</li> </ul>	
<b>Open Enrollment for HR/Benefits Solution (Recorded Webcast)</b>		
<p>This course prepares participants to use HR/Benefits Solution to manage their open enrollment activities. Topics include implementing benefit plan changes, managing employee enrollments, and setting up Employee Access for open enrollment.</p> <p><b>Important Note:</b> You may choose to review this recorded webcast in lieu of attending the live webinar if you've completed at least one open enrollment period with ADP's HR/Benefits Solution. This recorded webcast does not provide the opportunity to ask questions.</p>	<ul style="list-style-type: none"> <li>Identify the tasks you need to perform in HR/Benefits Solution before, during, and after open enrollment</li> <li>Use the tools and resources available to help you complete your open enrollment tasks</li> </ul>	
<b>Post-Implementation Reporting for HR/Benefits Solution (on or after 6/15/09)</b>		
<p>This course prepares participants to build on what they learned about running reports during implementation to help them generate the reports they will need after they transition to Service.</p>	<ul style="list-style-type: none"> <li>Create and run point-in-time performance review reports</li> <li>Create and run point-in-time reports with retroactive changes</li> <li>Generate comparison reports to compare data from two different points in time</li> </ul>	<ul style="list-style-type: none"> <li>Create and run historical reports</li> <li>Create turnover reports</li> <li>Generate pre-defined performance review and EEO-1 analytical reports</li> </ul>
<b>Generating Employee Statements for HR/Benefits Solution (on or after 6/15/09)</b>		
<p>This course prepares participants to generate employee statements using the HR &amp; Benefits module.</p>	<ul style="list-style-type: none"> <li>Choose the statement type that meets your needs</li> <li>Sequence the stages in the process of generating statements</li> <li>Generate an employee statement</li> <li>Download statement files</li> </ul>	<ul style="list-style-type: none"> <li>Modify a Microsoft® Word template file to meet your company's needs</li> <li>Use the Word mail-merge feature to generate individual statements</li> <li>Send a statement via e-mail</li> </ul>
<b>Talent Management for HR/Benefits Solution</b>		
<p>This course prepares participants to manage and report on their employees' skills, education, and other talent data using HR/Benefits Solution.</p>	<ul style="list-style-type: none"> <li>Set up Talent Management</li> <li>Update talent records and goals</li> </ul>	<ul style="list-style-type: none"> <li>Search for employees with specific talents</li> <li>Generate reports on talent information</li> </ul>



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<b>Employee Access Setup for HR/Benefits Solution</b>		
<p>This course prepares participants to plan for and set up the Employee Access feature of HR/Benefits Solution. Participants will review basic concepts, setup tasks, and the pages used to customize their Employee Access Web site.</p>	<ul style="list-style-type: none"> <li>• Define the user rights, notifications, and approval workflow for employee requests</li> <li>• Define the pages and sections to display in the Employee Access Web site</li> <li>• Set up custom content and employee resources for the Employee Access Web site</li> </ul>	
<b>Processing Self-Service Requests for HR/Benefits Solution (on or after 6/15/09)</b>		
<p>This course prepares participants to search for and approve, reject, or ignore self-service requests from employees and managers. Topics include an overview of self service, accessing requests, processing requests, and viewing request history.</p>	<ul style="list-style-type: none"> <li>• Access pending requests</li> <li>• Search for specific requests</li> <li>• Approve or reject requests received from employees and managers</li> </ul>	
<b>Recruitment for HR/Benefits Solution</b>		
<p>This course prepares participants to set up recruitment options, create e-mail communications, create job postings, review and modify candidate information, and hire candidates using the Recruitment feature of HR/Benefits Solution.</p>	<ul style="list-style-type: none"> <li>• Define recruitment settings</li> <li>• Modify application status labels</li> <li>• Create candidate communications</li> <li>• Define Manager Access recruitment user rights</li> <li>• Create prequalification questions</li> <li>• Create job postings</li> <li>• Search for qualified candidates</li> </ul>	<ul style="list-style-type: none"> <li>• Enter and update candidate information as an HR administrator or a manager</li> <li>• Combine multiple candidate applications</li> <li>• Apply candidates to other position</li> <li>• Hire candidates</li> <li>• Delete candidate records</li> <li>• Modify and close job postings</li> </ul>
<b>Leave Management for HR/Benefits Solution (before 6/15/09)</b>		
<p>This course prepares participants to use HR/Benefits Solution to track employee leave. Topics include defining and assigning leave policies, processing requests for time off, and running point-in-time leave reports.</p>	<ul style="list-style-type: none"> <li>• Create a leave policy</li> <li>• Assign a leave policy to the appropriate employee(s)</li> <li>• Define Employee and Manager Access user rights</li> <li>• Project an employee's amount of time off</li> </ul>	<ul style="list-style-type: none"> <li>• Enter leave requests</li> <li>• Process employee leave requests as a manager or an HR administrator</li> <li>• Edit and delete individual leave records</li> <li>• Run a point-in-time leave report</li> </ul>
<b>Time Off Management for HR/Benefits Solution (on or after 6/15/09)</b>		
<p>This course prepares participants to use the features of Time Off Management in the HR &amp; Benefits module to track employee time off. Topics include defining and assigning time off policies, processing requests for time off, and running standard time off reports.</p>	<ul style="list-style-type: none"> <li>• Create a time off policy</li> <li>• Assign a time off policy to the appropriate employee(s)</li> <li>• Define Employee and Manager Access user rights</li> <li>• Project an employee's amount of time off</li> </ul>	<ul style="list-style-type: none"> <li>• Enter time off requests</li> <li>• Process employee time off requests as a manager or an HR administrator</li> <li>• Edit and delete individual time off records</li> <li>• Run a point-in-time time off report</li> </ul>



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<b>Reporting for HR/Benefits Solution (before 6/15/09)</b>	
<p>This course prepares participants to create and run employee and benefits reports using HR/Benefits Solution reporting tools.</p> <p><b>Important Note:</b> This content is also covered in the <i>Employee Maintenance and Reporting for HR/Benefits Solution</i> course. Participants who have completed <i>Employee Maintenance and Reporting</i> should not enroll in this course.</p>	<ul style="list-style-type: none"><li>• Create point-in-time reports</li><li>• Compare data using change, comparison, and historical reports</li><li>• Create turnover, statement, and invoice reports</li><li>• Summarize data using an analytical report</li><li>• Modify an analytical report</li></ul>
<b>Importing Employee-Level Data for HR/Benefits Solution</b>	
<p>This course prepares participants to ready a file for import, and to use the import tool to add new employee records, update existing records, and apply mass changes to records in HR/Benefits Solution.</p>	<ul style="list-style-type: none"><li>• Ready files for import</li><li>• Import employee-level data</li><li>• Troubleshoot import errors</li></ul>