

# Human Resource Management Software



**Datatech**  
Your Source for Ag Software

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## **Datatech leads the way in Human Resource Management Software**

Thank you for taking the time to look at Human Resource Management (HRM) software from Datatech. We assure you that it'll be time well spent. Human Resources, or HR, has become extremely complex for agricultural operations. Managing employees, their needs and administrative requirements has never been more challenging. HR Managers seek to attract, select, train and reward employees, while also ensuring that their companies are in compliance with employment and labor laws. The latter are changing all the time, and Datatech works to stay on top of it all.

Agricultural businesses such as farms, labor contractors and packing facilities, may have a large number of employees, but the employees involved in HR execution may have little or no HR training. Now with an increasing emphasis on HR expertise, it's absolutely critical that they know how to deal with issues of hiring and firing, discrimination, reporting health benefits and insurance eligibility under the Affordable Care Act, worker's compensation claims and employee disputes.

Datatech's Farmer's Office or Labor Contractor's Office software currently support only minimal HR functions on their own, and both are mainly tied to payroll processes. So, in view of the foregoing, we have produced an exciting additional module - solely for executing HR functions - that has been well received by our clients. With the Datatech HRM software module, you can more specifically concentrate on the following areas: Personnel Tracking, Employee Benefits and Risk Management. The details are outlined in this brochure, but for more personalized information **we highly recommend that you request a free demonstration through the link on our website or by calling us**. Datatech HR Sales Representative, Jason Titterington can more specifically speak to your operation while demonstrating the HRM module.

It's important to note that Datatech HRM software is a separate software application that fully integrates with your existing Datatech payroll software. It cannot be purchased on its own as a standalone application. The database location for the HRM app is the same as for Datatech's Farmer's Office or Labor Contractor's Office. Information from both software applications can update many of the same records, but some confidential records can only be viewed through the HRM software module.

Purchased separately, Datatech also provides our clients with an extremely valuable **Document Management system inside the HRM module**. This gives you the wonderful capability of securely filing electronically scanned documents of any type (job application, W4, I9, WC incident, litigation documents, etc.) by attaching them directly to an employee account file. No more rifling through paper files, as the document is always securely accessible within the software.

Datatech's HRM software is a valuable tool to satisfy today's difficult employer requirements. Once you visualize the ease of use and experience the amazing utility of the HRM program operating in conjunction with Datatech's main software programs, you'll wonder why you hadn't utilized this for your operation before!

Datatech always appreciates customer feedback and suggestions with regard to your particular needs for HR management. Please feel free to contact Datatech Support with your comments and ideas.

# HR Program Feature List

## Employee File

The Employee File mirrors the employee entry window in Datatech's Accounting software, with these additional entries:

The screenshot shows the 'HR Employee View' window with the following fields:

- Account #:** [Yellow box]
- Name Key:** [Text box]
- Social Security #:** [Text boxes]
- Active:**
- Navigation:** Injuries, Credit Cards, Equipment, ACA, Employee Info, Deductions, Totals, Notes, Direct Deposit, Dependents, Health Benefits, Medical, Emerg Contacts, Training, Complaints, Litigation, Warnings
- Personal Information:**
  - Last Name: [Text box]
  - First & Middle Names: [Text box]
  - Mailing Address: [Text box]
  - City/State/Zip: [Text boxes]
  - Street Address: [Text box]
  - City/State/Zip: [Text boxes]
  - Email Address: [Text box]
  - Phone #: [Text box]
  - Cell Phone #: [Text box]
  - Date of Birth: [Text box]
  - Gender: Male (dropdown)
  - EEO Job Category: Not Defined (dropdown)
  - EEO Race: Not Defined (dropdown)
  - Driver's License #: [Text box]
  - Exp. Date: [Text box]
  - I-9 Alien Reg. #: [Text box]
  - Exp. Date: [Text box]
  - I-9 Document #: [Text box]
  - Passport #: [Text box]
  - Exp. Date: [Text box]
  - Visa #: [Text box]
  - Exp. Date: [Text box]
  - Need I-9 Alien Reg. #
  - S.S. # Not Matched
  - Need W-4
- Employment Information:**
  - Crew #: [Text box]
  - Department: [Dropdown]
  - Position: [Dropdown]
  - Employment Type: [Dropdown]
  - Pay Type: Hourly (dropdown)
  - Rate: [Text box]
  - Pay Rates... (button)
  - Date Hired: [Text box]
  - Date Terminated: [Text box]
  - Reason Terminated: [Text box]
  - Not Rehireable
  - Date of Last Raise: [Text box]
  - Last Check #/Date: [Text boxes]
  - Default G/L #: [Text box]
  - Advance G/L #: [Text box]
  - Chk. Stub Language: English (dropdown)
  - W/C Class Code: [Text box]
- Buttons:** Terminate, Rehire, Print, Profile, Save, Delete, Clear

## Dependents

Dependent information can be recorded for historical and insurance purposes.

The 'Enter Dependents' dialog box contains the following fields:

- First Name: MANUAL
- Middle Initial: A
- Last Name: BARRERA
- Sex: Male (dropdown)
- Date Of Birth: 05/25/2001
- Relationship: Child (dropdown)
- Student
- Insurance
- Buttons: Save, Cancel

## Emergency Medical Information

Employee Medical information can be recorded for employees for emergency and informational purposes.

The 'Medical Information' dialog box contains the following fields:

- Medical Condition: Bee Allergies
- Drug & Dosage: Epi pen if needed
- Additional Info: Epi pen located on employee. Follow instructions on pen if employee needs aid.
- Buttons: OK, Cancel

## Emergency Contacts

If you have existing Emergency Contacts in your Datatech software, the information will be available in the HR program. Expanded information such as Preferred Hospital and Physician are available.

**Edit Emergency Contact**

Name: Maria Barerra  Primary Contact

Relationship: Spouse

Phone #1: 559-224-6766

Phone #2:

Phone #3:

Health Care Agent

Comments: Spanish Speaking Only

Preferred Hospital: Fresno Community

Personal Physician: none

Physician Phone:

Physician Address:

Medical Ins. Co:

Policy #:

Medical Treatment Authorized

Date Submitted: ...

## Benefits

The Benefits tab will allow you to record insurance benefits, including health, dental, vision, etc., as well as other employee benefits like 401(k) plans. All details including Date Offered, Declined Coverage and Spouse's coverage can be recorded. We also provide a benefits eligibility record created automatically from the insurance eligibility report. The program automatically adds the Employee's payroll deduction when a benefit with Employee Cost is added.

**Enter Insurance Coverage**

Ded Num: 3 ... Employee: PEDRO CASTR BARRERA

Benefit Provider: BARKLEY

Benefit Plan: BARKLEY BASIC MEDICA

Date Eligible: 06/01/2014 ... Date Offered: 05/25/2014 ...

Declined:

- Declined Employee Coverage
- Declined Spouse Coverage
- Declined Dependent Coverage
- Covered on Spouse's Plan

Spouse's Employer:

Other Reason for declining employee coverage

Explanation:

Accepted:

Starting Date: 06/01/2014 ... Ending Date: ...

- Spouse Insured
- Children Insured

Employee Cost: 0.00 Depend Cost: 0.00

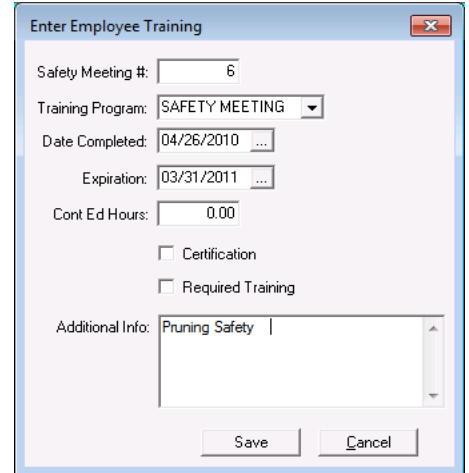
Employee Pct: 0.00 Depend Pct: 0.00

Employee Share: 0.00  Section 125 Deduction

Comments:

## Training

An easier way of tracking certifications and retraining required was a major request from our customers. The existing Safety Meeting entry that is available in Datatech software is also available in the HR module. However, with the HR module when Safety Meetings are entered, the information will be updated to the Training on the Employee entry. You can also enter individual entries on an employee if the entry is specific to this employee. This would be applicable when an Employee receives outside training or certification. Existing entries in the Safety Meetings in Datatech software can be moved to the HR program. You can select training meetings that an employee needs to attend when entering a new employee. There's a query screen and report to let you know what training has not been completed for each new employee.

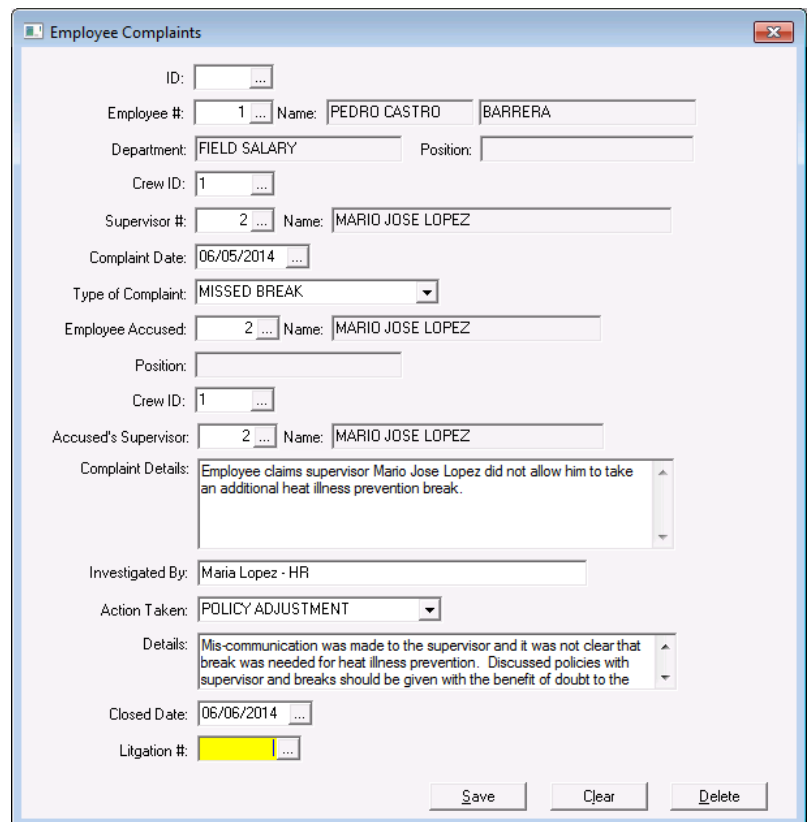


The 'Enter Employee Training' dialog box contains the following fields and options:

- Safety Meeting #: 6
- Training Program: SAFETY MEETING
- Date Completed: 04/26/2010
- Expiration: 03/31/2011
- Cont Ed Hours: 0.00
- Certification
- Required Training
- Additional Info: Pruning Safety
- Buttons: Save, Cancel

## Employee Complaints

Tracking and making sure employee complaints are resolved is vital for any HR department. The Employee Complaints entry allows you to record all details and record when the matter is closed, allowing you to get reports of un-resolved complaints. Complaints that go to litigation can be linked to the Litigation entry below.



The 'Employee Complaints' form contains the following fields and options:

- ID: [ ]
- Employee #: 1 Name: PEDRO CASTRO BARRERA
- Department: FIELD SALARY Position: [ ]
- Crew ID: 1
- Supervisor #: 2 Name: MARIO JOSE LOPEZ
- Complaint Date: 06/05/2014
- Type of Complaint: MISSED BREAK
- Employee Accused: 2 Name: MARIO JOSE LOPEZ
- Position: [ ]
- Crew ID: 1
- Accused's Supervisor: 2 Name: MARIO JOSE LOPEZ
- Complaint Details: Employee claims supervisor Mario Jose Lopez did not allow him to take an additional heat illness prevention break.
- Investigated By: Maria Lopez - HR
- Action Taken: POLICY ADJUSTMENT
- Details: Mis-communication was made to the supervisor and it was not clear that break was needed for heat illness prevention. Discussed policies with supervisor and breaks should be given with the benefit of doubt to the
- Closed Date: 06/06/2014
- Litigation #: [ ]
- Buttons: Save, Clear, Delete

## Litigation

If an employee complaint goes to litigation, all of the details of the case can be recorded and reported on. A grid will allow you to enter multiple incidents, such as recording sessions with the employee, mediator, attorney, etc. When the litigation is resolved, a Discharge date can be entered, allowing you to obtain reports of open or closed litigation issues.

The screenshot shows the 'Employee Litigation Entry' form. It contains the following fields and values:

- ID #: [ ]
- Employee #: 1 Name: PEDRO CASTRO BARRERA
- Department: FIELD SALARY Position: [ ]
- Crew ID: 1
- Supervisor: 2 Name: MARIO JOSE LOPEZ
- Date Notice Rec'd: 06/05/2014
- Litigation Type: NON PRODUCTIVE TIME
- Details: Employee Claims he is not being paid for all non productive time.
- Attorney Name: Barstow & McCormick
- Phone #: 559-555-1234
- Employee's Attorney: [ ]
- Phone #: [ ]
- Discharge Date: [ ]
- Details: [ ]

At the bottom, there is a table with columns 'Date', 'Action >>', and 'Details'. The table is currently empty.

Buttons: Save, Clear, Delete

## Warnings/Discipline

The Employee Warnings entry allows you to record incidents that caused warnings to the employee and action taken. If a warning resulted in litigation, the original incident can be linked to the litigation entry.

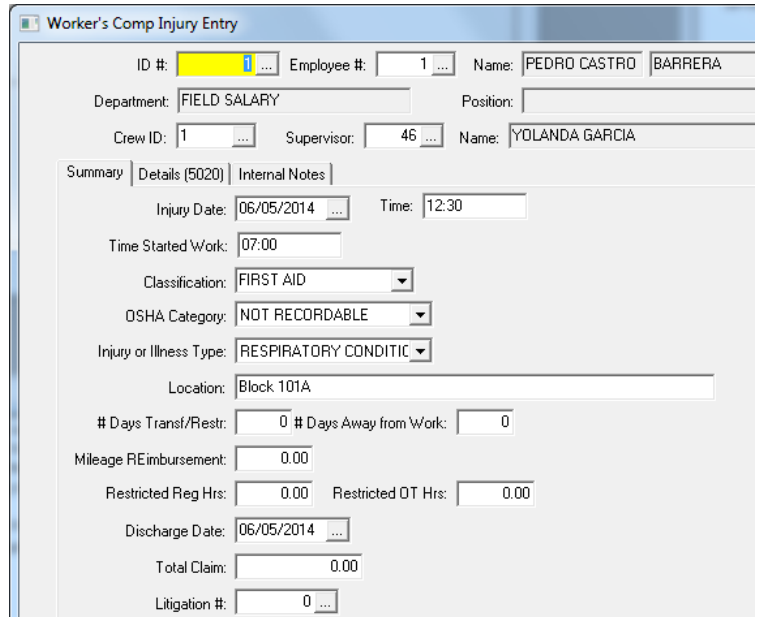
The screenshot shows the 'Enter Employee Warning' form. It contains the following fields and values:

- ID: 1
- Employee #: 1 Name: PEDRO CASTRO BARRERA
- Department: FIELD SALARY Position: [ ]
- Crew ID: 1
- Supervisor: 46 Name: YOLANDA GARCIA
- Warning Date: 06/06/2014
- Type of Warning: UNEXCUSED ABSENCE
- Warning Details: Employee absent on 06/05/14 without notice
- Action Taken: ADJUSTED SCHEDULE
- Action Details: Verbal Warning to employee that they need to notify supervisor or office in advance of absence.
- Date Closed: 06/06/2014
- Litigation #: 0

Buttons: Save, Clear, Delete

## Worker's Comp Injuries

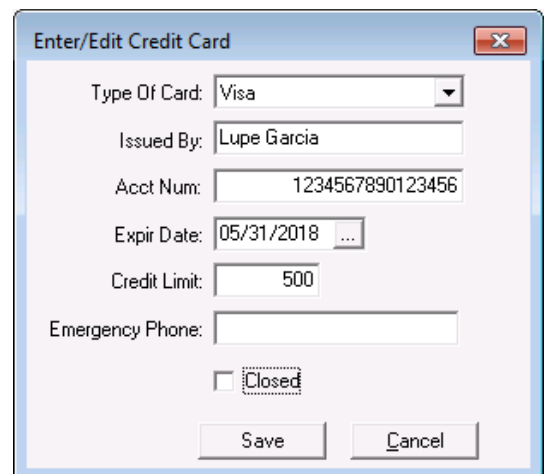
Tracking more information on Workers Comp injuries was the #1 request by Datatech customers. The HRM program allows you to track much more detail on incidents. The first entry on Workers Comp is a Summary of the incident, including date, internal and OSHA classifications, and more. The Details tab allows you to record specific notes on the incident, including medical information and appointment dates. This information will print on the OSHA 5020 form. For each appointment the resulting status can be recorded. For example, if the employee is assigned modified duty or days off. The restrictions for modified duty can be recorded as well, along with the date range for the restricted duty. An Internal Notes tab is available for additional information that is not reported on the OSHA 5020 form.



The screenshot shows a software window titled "Worker's Comp Injury Entry". It contains several input fields and dropdown menus. At the top, there are fields for ID # (1), Employee # (1), Name (PEDRO CASTRO BARRERA), Department (FIELD SALARY), Position, Crew ID (1), Supervisor (46), and Name (YOLANDA GARCIA). Below these are three tabs: Summary, Details (5020), and Internal Notes. The Summary tab is active, showing fields for Injury Date (06/05/2014), Time (12:30), Time Started Work (07:00), Classification (FIRST AID), OSHA Category (NOT RECORDABLE), Injury or Illness Type (RESPIRATORY CONDITIC), Location (Block 101A), # Days Transf/Restr (0), # Days Away from Work (0), Mileage REimbursement (0.00), Restricted Reg Hrs (0.00), Restricted OT Hrs (0.00), Discharge Date (06/05/2014), Total Claim (0.00), and Litigation # (0).

## Credit Cards issued to employees

Credit cards issued to employees, including gas and store cards may be recorded for informational purposes.



The screenshot shows a software window titled "Enter/Edit Credit Card". It contains several input fields and a checkbox. The fields are: Type Of Card (Visa), Issued By (Lupe Garcia), Acct Num (1234567890123456), Expir Date (05/31/2018), Credit Limit (500), and Emergency Phone. There is a checkbox labeled "Closed" which is currently unchecked. At the bottom, there are "Save" and "Cancel" buttons.



## Assets/Equipment issued to employees

An Asset Entry window allows you to set up your Assets, such as small tools and supplies that you would like to check out either in batches to supervisors, or individually to each employee. First you can record the total quantity that you have purchased.

Asset...	Serial #	Description >>	Quantity	Date Purchas...	Original Cost	Replacement Cost	Location	County	State	New/U...	Department	Employee Name	Catego
01		Dell Laptop Computer	1	05/15/2014	900.00	900.00	Fresno	Fresno	CA	New			
02		Ladders	50		0.00	0.00	Fresno	Fresno	CA	New			

Then, on the Supervisor or Employee Equipment Check-Out/Check In Entry, you can select the Asset and the quantity being assigned to that employee. Other reports allow you to see which employees have Equipment Checked Out and total quantities.

Transaction #:

Employee #:  PEDRO CAS BARRERA

Asset #:  Ladders

Transaction Date:

Transaction Type:

Quantity:

Comments:

## Entering HR Information Outside of the Employee Entry window

Entry windows for Workers Comp Injuries, Complaints, Warnings and Litigation are available outside of the individual Employee entry window. This will be helpful if multiple incidents are being entered or if you would like to filter incidents for all employees, by querying status (Open/Closed/All), Classification, Department, Injury/Illness Type, or Date Range.

Filters:

Status:  Open  Closed  All

Injury Starting Date:  /  /  ... Ending Date:  /  /  ... Department:

Classification:  OSHA Category:  Injury/Illness Type:

ID #	Empl #	Last Name	First name	Injury Date	Classification	Discharge Date
1	1	BARRERA	PEDRO CASTRO	06/05/2014	FIRST AID	06/05/2014

## Update License & Medical Expirations

A screen has been designed to allow you to update driver's license numbers, expiration dates, and medical exam expiration dates in grid format. It displays all employees that are active. If you enter an expiration date filter, it will only display those employees that have already had an expiration date entered.

Employee #	Name Key	Last Name	First Name	License #	D/L Exp Date	Med Exam Date
5526	11					
224	APOLONAGUST089	APOLONIO CASTRO	AGUSTIN			
172	APOLONALFRED45	APOLONIO CASTRO	ALFREDO			
96	AURELIO TORRES	TORRES	AURELIO			
192	AVENDAJAVIER87	AVENDANO PEREZ	JAVIER			
168	AVILACARLOS67	AVILA	CARLOS J			
9	AYALALUPE 65	AYALA	LUPE			
98028	AYALAMARIA09	AYALA	MARIA			
98015	AYALAMARIA87	AYALA	MARIA			
196	BALTAZVICTOR58	BALTAZAR	VICTORINO			

## Reports

### Employee Profile

This report includes all of the information, or selected information about the employee, including all items listed above.

Other employee lists that are currently available in the payroll system have also been added to the HR menu so that you don't have to switch programs to print. See the current options under Employee Lists.

### Employee Census

This is a report of all employees covered by a specific benefit plan, such as Medical Insurance. It will list the employee, dependents, dates of birth, and whether or not they are currently covered on the plan.

### Employee Complaint Report

A Complaint Form can be printed with the details of a complaint. In addition, summary reports are available, and can be selected by Open or Closed, Date Range, Department, Type of Complaint, and Action Taken.

### Employee Warning Report

A Warning Form can be printed with the details of the warning. In addition, summary reports are available, and can be selected by Open or Closed, Date Range, Department, Type of Warning and Action Taken.

## **Employee Injury Report**

An Injury Form can be printed with the details of the injury. In addition, summary reports are available, and can be selected by Open or Closed, Date Range, Department, Classification, OSHA Category and Type of Illness or Injury.

## **ACA Reporting**

1094-C and 1095-C creation and reporting for the ACA are included in the Human Resources module. Employers are now required to provide employees with the 1095-C form at the end of the year, which can be printed and mailed along with their W-2. Providers of minimum essential coverage, including employers providing coverage under a self-insurance group health plan, are subject to the "Section 6055" reporting requirements. This includes information reporting on who is covered under a particular health insurance policy (e.g. the employee and/or spouse and/or dependents) and what months they were covered. Fully insured employers are subject to the "Section 6056" reporting requirements, which similarly must be reported on the 1095-C form, including which months the employee was offered/eligible/enrolled in the employer's health plan. The 1095-C form includes areas to report both sections 6055 and 6056 information. Self-insured employers will fill out both areas. A transmittal form, the 1094-C, will also be filed with the IRS.

Electronic reporting of the information to the IRS is available, subject to the same rules as electronic reporting of W-2 information (i.e. electronic reporting is required for 250 employees or more). Files with the 1095-C information are uploaded to a separate IRS web site similar to how you currently upload the W-2 electronic files to the SSA's web site.

## **Completing the 1095-C Form**

Datatech's Human Resources program includes a database to store all of the information that is required to be reported on the 1095-C, including both section 6056 (required of all employers) and section 6055. Self-insured employers need to maintain the section 6055 information themselves for reporting at the end of the year, or import the section 6055 information from a file provided by the health plan administrator that contains the required information.

## **Workers Comp**

We generate reports that contain the summary information necessary for OSHA records. This includes electronically preparing and printing a 5020 form with the information from the Injury record and the OSHA 300 summary log.

## **Insurance Reporting Compatibility**

Datatech provides a basic export option to send your employee's insurance enrollment information electronically in several formats, such as CSV and Excel, as well as an '834' and additional customized file specifications that are used in the insurance industry. If you are currently working with an insurance company and would like to discuss compatibility with our software, please contact us.

## **Pricing/Ordering Information**

For a free demonstration and quote on the HR software, please call Jason at (888) 222-DATA (3282) ext. 116