

Datatech Human Resources Software



Datatech
Your Source for Ag Software

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Why is Datatech creating a Human Resources program?

Human resource management is the management process of an organization's workforce, or human resources (HR). It is responsible for the attraction, selection, training, and rewarding of employees, while also ensuring compliance with employment and labor laws.

Agricultural businesses, such as farms, labor contractors and packing facilities, may have a large number of employees, but the employees involved in HR may have little or no HR training. There has not been as much emphasis on HR, but it is becoming more important, given issues with hiring and firing, discrimination, health benefits under the Affordable Care Act, worker's compensation claims and employee disputes.

The HR functions that Datatech software currently supports are mainly tied to payroll processes. However, we have seen a growing need to add additional HR functions.

The Datatech HR software module will concentrate on the following areas: Personnel Tracking, Employee Benefits and Risk Management. We will also have some attendance tracking capabilities based on the time information entered through the payroll system. **We do not anticipate adding any detailed HR Management features at this time** (tracking job applicants, interviews, hiring, firing, exit interviews), other than the current hiring and firing information that the payroll program includes.

The HR software is a separate software application from the Payroll or full Datatech Accounting software you currently use. The data location however, is the same. Information from both software applications update the same record, but some pieces of information can only be viewed through the HR software.

As part of future upgrades, there will also be a document filing option for the HR module that will give you the capability of electronically filing scanned documents of any type, and attaching them to an employee account (job application, W4, I9, etc) or a specific incident (such as filing documents related to litigation).

Datatech's HR program is currently still in development. We are looking for feedback and suggestions from customers on what their particular needs for HR management are. Please feel free to contact Datatech personnel with your comments and ideas.

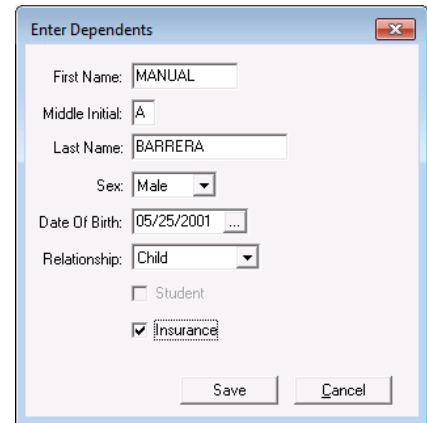
HR Program Feature List

Employee File

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

Dependents

Dependent information can be recorded for historical and insurance purposes.

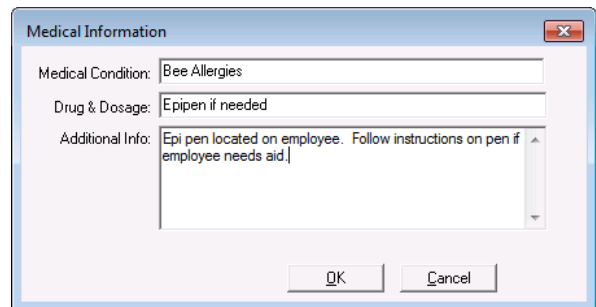


The 'Enter Dependents' dialog box contains the following fields and options:

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

Emergency Medical Information

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

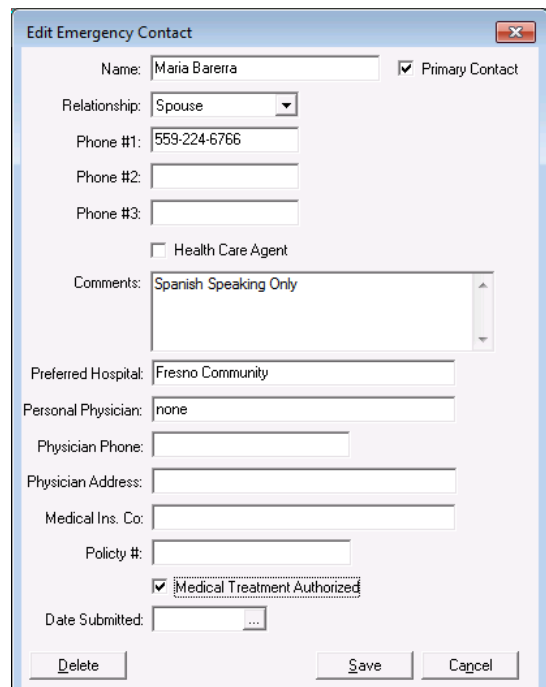


The 'Medical Information' dialog box contains the following fields and options:

- 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.



The 'Edit Emergency Contact' dialog box contains the following fields and options:

- Name: Maria Barerra
- Primary Contact
- Relationship: Spouse (dropdown)
- Phone #1: 559-224-6766
- Phone #2: (empty)
- Phone #3: (empty)
- Health Care Agent
- Comments: Spanish Speaking Only
- Preferred Hospital: Fresno Community
- Personal Physician: none
- Physician Phone: (empty)
- Physician Address: (empty)
- Medical Ins. Co: (empty)
- Policy #: (empty)
- Medical Treatment Authorized
- Date Submitted: (calendar icon)
- Buttons: Delete, Save, Cancel

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.

Future enhancements include having benefit eligibility record created automatically from an insurance eligibility report.

The program may automatically add the Employee's payroll deduction when a benefit with Employee Cost is added.

Enter Insurance Coverage

Ded Num: [8] ... 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: []

[Save] [Cancel]

Training

An easier way of tracking certifications and re-training needed 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.

Enter Employee Training

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 | []

[Save] [Cancel]

Existing entries in the Safety Meetings in Datatech software can be moved to the HR program. A future enhancement will allow you to select training meetings that an employee needs to attend when entering a new employee. There will be a screen and report to let you know what training has not been completed for each new employee.

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 screenshot shows the 'Employee Complaints' form with the following data:

- 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 record multiple incidents that will allow you to record sessions with the employee, mediator, attorney, etc. When the litigation is resolved a Discharge date can be entered, allowing you to report open/closed litigation issues.

The screenshot shows the 'Employee Litigation Entry' form with the following data:

- 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 #: 553-555-1234
- Employee's Attorney: []
- Phone #: []
- Discharge Date: []
- Details: []

Date	Action >>	Details

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 a web-based form titled "Enter Employee Warning". The form contains the following fields and values:

- ID: 1
- Employee #: 1, Name: PEDRO CASTRO BARRERA
- Department: FIELD SALARY, Position: (empty)
- 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 at the bottom: Save, Clear, Delete.

Worker's Comp Injuries

Tracking more information on Workers Comp injuries was the #1 request by Datatech customers. The HR program will allow 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 screenshot shows a web-based form titled "Worker's Comp Injury Entry". The form contains the following fields and values:

- ID #: (highlighted in yellow), Employee #: 1, Name: PEDRO CASTRO BARRERA
- Department: FIELD SALARY, Position: (empty)
- Crew ID: 1, Supervisor: 46, Name: YOLANDA GARCIA
- Summary | Details (5020) | Internal Notes
- 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
- Litigation #: 0

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.

Worker's Comp Injury Entry

ID #: 1 ... Employee #: 1 ... Name: PEDRO CASTRO BARRERA

Department: FIELD SALARY Position:

Crew ID: 1 ... Supervisor: 46 ... Name: YOLANDA GARCIA

Summary | Details (5020) | Internal Notes

(25) Task employee performing at time of accident:
Spraying crops with chemicals.

(26) What happened:
Wind gust blew spray back in employee face

(19) Resulting Injury or Illness:
Temporary respiratory problems.

Object or Substance that directly harmed employee:

Medication:

Duty Restrictions:

Treated in ER In-Patient Overnight Date of Death: ...

Appt Date	Appt With	Location	Phone	Miss...	INJURY STATUS	RESTRIC
08/02/2014	Northwest Chiropractic	Fresno, CA	227-1777	<input type="checkbox"/>	MODIFIED WORK	No Lifting o

Save Clear Delete

Credit Cards issued to employees

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

Enter/Edit Credit Card

Type Of Card: Visa

Issued By: Lupe Garcia

Acct Num: 1234567890123456

Expir Date: 05/31/2018

Credit Limit: 500

Emergency Phone:

Closed

Save Cancel

Assets/Equipment issued to employees

An Asset Entry window allows you to set up your Assets. For small tools and supplies that you would like to check out in batches to supervisors 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				New			

On the Employee Equipment Check-Out/Check In entry you can select the Asset and the quantity. Future reports will allow you to see which employee have Equipment Check 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 status (Open/Closed/All), Classification or Date Range.

Worker's Comp Injuries

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

One screen was designed to allow you to update driver's license numbers, expiration dates, and medical exam expiration dates in grid format. This is a work in progress.

Currently, it displays all employees that are active. If you enter an expiration date filter, it will only display those employees that have already have an expiration date entered. Additional filters will be added for Department and Position.

Employee #	Name Key	Last Name	First Name	License #	D/L Exp Date	Med Exam Date
5555	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

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 do not 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.

Future Enhancement:

Workers Comp

We will be generating reports that contain the summary information necessary for Cal-OSHA records. This includes preparing a 5020 form with the information from the Injury record and the OSHA 300 log.

Time and Attendance Reports

This is a work in progress. You will be able to enter hours worked each day manually, or if you are entering hours on a daily basis in the Payroll program, this information can automatically update the time and attendance records. You will be able to track days not worked by Excused Absence, Sick, Vacation, Jury Duty, Unexcused Absence, or No Work.

ACA Compliance

The software that implements reporting requirements for the ACA will be included in the Human Resources module. *This software will not be a part of the standard payroll package.*

Employers will be required to provide employees with a new form at the end of the year, the 1095-C. This form can be mailed along with their W-2. Both forms may be provided to employees electronically as well, provided that an employee consents to electronic delivery of the forms. 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. Employers are subject to the "Section 6056" reporting requirements. This section details the information that 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 will include areas to report both section 6055 and section 6056 information. Self-insured employers will fill out both areas. The first 1095-C forms will be filed in 2016, for the 2015 calendar year.

A transmittal form, the 1094-C, will also be filed with the IRS.

Electronic reporting of the information to the IRS will be possible, 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 will likely be uploaded to the IRS web site just as you currently upload the W-2 electronic files to the SSA's web site.

Completing the 1095-C Form

Datatech's Human Resources program will include 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 will either 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.

Electronic Delivery of W-2's and 1095-C's

Employers may have the opportunity to significantly reduce costs for printing, preparing and mailing employee year end statements. Employees that consent to electronic delivery of statements would typically log into a web site and access their W-2's and 1095-C's as PDF documents, download them, and print them out to file with their tax returns.

There are three possibilities for accomplishing the delivery of year end statements:

- Datatech may develop the software needed for you to operate your own web site that employees would be able to log into to retrieve their forms. This would require a server running Internet Information Services and DataFlex WebApp. For security purposes, this server would be linked only to a database containing the employee statement information, and not to your entire accounting/payroll database.
- Datatech may develop a web site designed for customers to upload their employee statement information and provide a hosting service for our customers. Costs for this service would likely be based on a per employee basis. This would eliminate the need for you to set up and operate your own web server.
- Datatech may develop an export function that would allow you to upload your employee statements to a third party hosting provider.

We would like to get feedback from our customers regarding the electronic delivery of W-2's and 1095-C's. You may want to survey your employees to determine how many have Internet access currently, and how many may be interested in receiving their year-end statements on the Internet. Is electronic delivery of year end employee statements feasible for farm workers? If so, which of the above methods of delivery would you prefer?

Insurance Reporting Compatibility

At this time Datatech is planning on providing a basic export option to send insurance eligible employee information to Excel. This option may not be compatible with all insurance companies file specifications. If you are currently working with an insurance company and would like to discuss compatibility with our software, please contact as soon as possible.

Pricing/Ordering Information

Pricing for the Human Resources software starts at \$2,495 for a single use system. Additional fees apply for multi user systems, payroll/bookkeeping services, custom programming and set up and training. For a quote on the HR software, please call Jason at (888) 222-DATA (3282) ext. 101