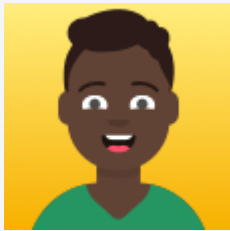


# Warren Mack, HR & Payroll Generalist



Warren is the point person for all his tech startup's HR-related needs. When not on the phone, he spends the majority of their time navigating every part of the Paylocity suite to complete his work.

## Responsibilities

- Provides support in areas of Human Resources including, recruitment and employment, personnel records, employee relations, job evaluation, compensation management, benefits administration, organization development, and training.
- Duties may also cover payroll functions depending on the organization needs.

## Modifiers

Goals	Influencers
<ul style="list-style-type: none"><li>• Ensure HR operations are operating effectively</li><li>• Assist in creation, development, and implementation of HR policies and training initiatives</li><li>• Track, organize, and analyze HR data</li><li>• Compile data for annual employee performance reviews</li><li>• Assist in recruitment and onboarding process</li><li>• Remain compliant and up to date with labor legislation</li></ul>	<ul style="list-style-type: none"><li>• Executive</li><li>• Other HR professionals</li></ul>

## Basic info

- Single HR resource for a workforce of 40 EEs.
- Salaried employee within a tech startup
- Has supervisory responsibilities, but no direct reports.
- When not on the phone, they spend the majority of their time in front of a computer.
- 1-5 years of experience

Product usage	Pain points
<ul style="list-style-type: none"><li>• Attempts to complete all goals w /in the product.</li><li>• Power user of the suite.</li></ul>	<ul style="list-style-type: none"><li>• Their success is often contingent on other people doing their own jobs well.</li><li>• Having to chase down people instead of focusing on their 'core' functions.</li></ul>

## Journey through PCTY Unified Suite

Touch points	Journey	
	Activities	Opportunities for improvement (include needs)
Recruiting	<p>Creates/manages job postings</p> <p>Invites Supervisors, Leaders to Recruiting to help oversee jobs and new applicants</p> <p>Adds and manages leads (candidates not tied directly to jobs)</p> <p>Configures recruiting processes, communication templates, and offer letters</p> <p>Runs background checks, sends offer letters, and transfers employees to Onboarding once hired</p>	
Onboarding	<p>Configures Onboarding packets, tasks and assigns who completes individual onboarding tasks</p> <p>Oversees all Onboarding activity across company</p> <p>Adds newly hired employees to Onboarding and begins the Onboarding process</p> <p>Enters base employee information (Cost centers, work location, pay rate)</p> <p>Transfers employees to payroll once Onboarding process is completed</p>	

LMS	<p>Create, assign and track required HR training (i.e. harassment training, compliance training, HR policies, manufacturing-specific training like safety rules)</p> <p>Creates and manages learning across company:</p> <ul style="list-style-type: none"> <li>• Administrative support (e.g. education on using specific applications, enterprise-specific processes...)</li> <li>• Job-specific (e.g. manager/leadership training)</li> </ul>	
Time and Labor		
Performance	<p>Configures performance review process for company</p> <p>Oversees all performance review, goals, and journals activity across company</p> <p>Sets company wide goals</p> <p>Adds and customizes impressions</p> <p>Create journal templates</p>	
Benefits		
Payroll	<p>Only applies to smaller companies:</p> <ul style="list-style-type: none"> <li>• Prepare for payroll</li> <li>• Run payroll</li> <li>• Run reports and share with stakeholders</li> <li>• Assess \$needs</li> </ul>	
Expense		
Surveys	<ul style="list-style-type: none"> <li>▪ Potential power users. <ul style="list-style-type: none"> <li>▪ send surveys to poll workforce to understand and craft company culture.</li> </ul> </li> </ul>	<p>Pain points:</p> <ul style="list-style-type: none"> <li>• finding the feature</li> <li>• selecting the right group of EEs to send a survey to.</li> </ul>
Notifications/Memo		
Compliance/ACA	<p><b>ACA</b></p> <p>Monitoring full time and full time equivalent employee count through Audit Alerts and Required Actions</p> <p>Extends health coverage for employees who meet ACA criteria</p> <p>Generates 1095C's for company, annually</p> <p><b>Compliance</b></p> <p>Ensures compliancy for EEO classifications/reporting, I-9 eligibility, state required sexual harassment/HR training</p> <p>Assigns company handbook and other company documents to be acknowledged</p>	
Experience Builder (Employee Action Form)	<p>Edit access and approval history for Employee Action Forms</p> <p>(Super Approver) Fully approves Employee Action Forms that are in flight</p>	
HR Edge	<p>Contacts and utilizes HR Edge</p> <p>Views HR resources, learn best practices, protocols on a range of topics (sexual harassment)</p> <p>Builds company handbook with HR Edge</p> <p>Directly contacts 3rd party for HR advice</p>	
Compensation Management	<p>Configuring compensation cycles, deadlines, and budget</p> <p>Final approval of compensation plans</p> <p>Create compensation statements for employees to receive</p>	

Community		
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