HR Training Checklist

✓	HR Training Checklist
	Review HR user questions after attending Employee Navigator Tuesday HR Training
	Basic Tasks Training
	Add an employee (go through all steps together including sending the welcome email and registering the employee in the system)
	Login as employee and review homepage – review customization options for logo, welcome message, contacts, documents and explain you will show HR where to make changes a little later
	Go through the system as a new hire (click 'Start Benefits' button) and review personal info, add dependents, complete enrollment (elect/decline every benefit) and click 'agree' so HR is aware of the process each employee will go through in the system. (Also, complete tasks if group is using Onboarding and review PTO from employee perspective if group is using PTO)
	Troubleshooting employee login – walk through the common questions (there's no 'start' button or 'what's my password', etc.) and how to verify employee info when system displays message 'No Records Found'
	Reset employee password / send welcome email
	Terminate an employee
	Process class change
	Pull payroll deductions report / simple ad-hoc report and how to save reports
	Approve pending EOI
	Approve pending profile changes/enrollments (if group is pending changes/elections)
	View employee benefits summary
	Upload documents
	Customizing the Employee Experience
	Upload logo
	Customize email templates
	Customize welcome message
	Add home page contacts / home page articles / home page documents
	Questions
	HR Sign Off Confirm HR user has reviewed the site (both from HR and employee view) and they are super ready to go live with their employees