

# Getting Started Guide

Staff Systems Vs 6.2

Get Started with HR Coach Staff Systems!  
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## Contacting Your HR Coach

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The HR Coach Staff Systems software is available exclusively from licensed members of the HR Coach network.

You can access your HR Coach contact details at any time by selecting **Help/ About HR Coach Staff Systems** from within the HR Coach Staff Systems program.

You can also find your local HR Coach by visiting our website at [www.hrcoach.com.au](http://www.hrcoach.com.au) or contacting us on 1300 550 674.

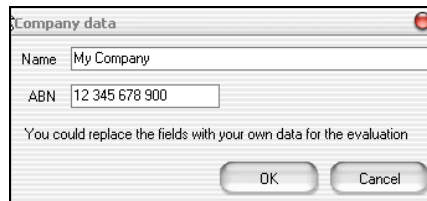
## Installation

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The HR Coach Staff Systems software uses an Installation Wizard to guide you through the installation process. Follow the on screen instructions and use the **“NEXT”** button to advance to the next screen. Most users will not need to change any of the default installation information.

Once the installation is complete, HR Coach Staff Systems will automatically open. If the program does not open, simply double click on the HR Coach Icon on your desktop.

To customise the software for your business, enter your Company Name and ABN and click “OK”.



Company data

Name My Company

ABN 12 345 678 900

You could replace the fields with your own data for the evaluation

OK Cancel

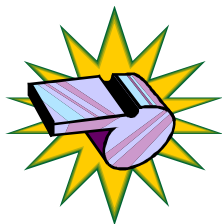
To complete the installation, you must register the software. If you do not have a registration code, the system will operate in demonstration mode for 14 days. You will not be able to print any documents until the program is registered.

To register the software, select **“I have the License Code”** and enter your registration details.

**Note:** You must enter your registration details exactly as they have been provided to you by your HR Coach. The registration information is case sensitive. If you are having difficulties with your registration or do not have a registration code, please contact your HR Coach.

For the purposes of the “Get Started Guide”, we will assume that you have registered the software.

Now that you have the system installed, its time to explore!



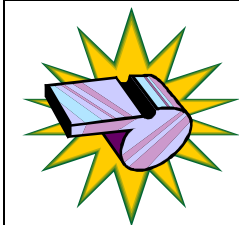
The HR Coach Staff Systems software is only one of the proven tools your HR Coach has to help your business.

Contact your HR Coach today for more information!

## Getting Started Wizard

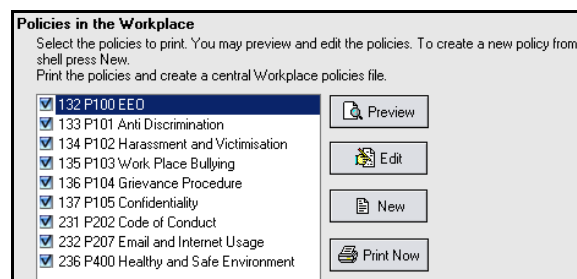
HR Coach Staff Systems is designed for real-world businesses. You need to “manage on the run” and you want access to the tools and documents you need- FAST! The first time you open HR Coach Staff Systems, you are greeted with the “**Getting Started Wizard**”.

The Getting Started Wizard helps you get organised in a flash. It steps you through creating policies in the workplace, generating letters of offer and employment contracts for existing staff, as well as position descriptions.



All of documents in the HR Coach Staff Systems can be customised to suit your business. Your HR Coach can assist you with reviewing your current documentation and identifying the risk areas in your business.

- **Policies-** HR Coach Staff Systems includes policies to help you reduce your risk. You can edit the standard policies and add your own.



- **Letters of Offer (Employment Contracts)-** HR Coach Staff Systems can help you create letters of offer for your existing staff members. If you don't have employment contracts in place, its time to act! You can protect your business and reduce your risk by clearly stating the conditions of employment to your staff members.

If you select “**YES**”, HR Coach Staff Systems guides you through the process of creating employment contracts for each staff member.

If you select “**NO**”, you are directed to the Staff File Manager, where you can manually enter the details for your current staff. Click the “**Add**” button to enter details for your staff.

| Payroll Number | Surname | First Name | Date of Birth | Department     | Position |
|----------------|---------|------------|---------------|----------------|----------|
|                | Don     | Reed       | 04/04/1973    | Sales          | Sales    |
|                | Penny   | Johnson    | 12/03/1967    | Administration | Admin M  |

Staff File Manager

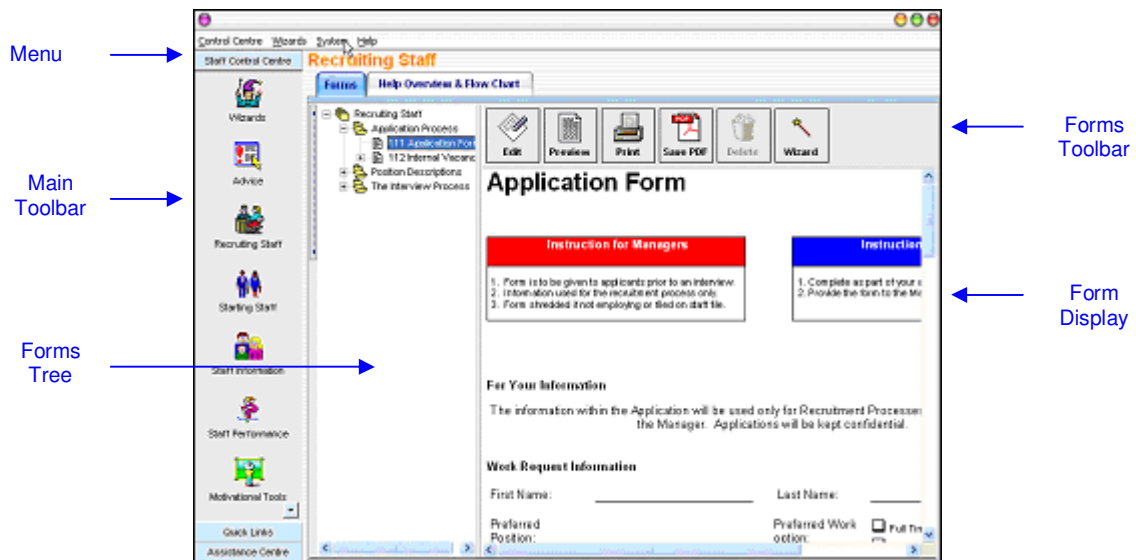
Click the “**ADD**” button to enter details for each staff member. To exit the Staff File Manager, click “**EXIT**”.



You can access the wizard at a later date by clicking  and then select .

## System Overview

HR Coach Staff Systems has everything you need to manage your staff through the employment life cycle- from recruitment to termination. To help you explore the system, let's review some of the navigation features.



HR Coach Staff Systems Main Screen

### Menu

You can access any of the menus by clicking on the text. Menus include Control Centre, Wizards, System, and Help.

### Main Toolbar

The main toolbar gives you quick and easy access to the main HR Coach Staff Systems functions. There are three toolbars- Staff Control Centre, Quick Links and Assistance Centre.

#### Staff Control Centre

Use this toolbar to select one of the staff document sections. A listing of forms for each section is located in Appendix A at the end of this guide.

- **Wizards**- Allows you to quickly complete standard tasks
- **Advice**- links you to the advice you need- including government contacts and service providers.
- **Recruiting Staff**- All the documents you need to source and interview staff
- **Starting Staff**- When you find the person you want, start them out right with employment contracts and orientation programs
- **Staff Information**- Everything you need including policies and standard forms
- **Staff Performance**- Document and manage staff performance
- **Motivational Tools**- Keep staff focused and energised
- **Business Reports**- Collate and report key staffing information
- **My Flowcharts**- Illustrate the workflow in your business. You can use the HR Coach examples as a guide or design your own.

#### Quick Links

Use this toolbar to access any of the Wizards. Wizards are used to help you quickly complete standard tasks.

- **Recruiting Staff**- Use this Wizard when you are recruiting and interviewing new staff
- **Start Up Staff**- Use this Wizard when you are hiring a new staff member
- **Salary Review**- Use this Wizard when you are reviewing salary/ wages for existing staff

- **Getting Started- Everything you need to get started including policies and contracts**
- **Exit Staff- Use this Wizard when a staff member resigns or is terminated**
- **Staff File Manager (SFM)- Database of Staff Records**
- **SFM Reports- Print or Preview Key reports on staff information**

Assistance Centre

Use this toolbar to access any of the Assistance Centre Flowcharts. These flowcharts help you with a step-by-step summary of processes to manage staff.

- **Recruitment- Helps you to effectively plan and execute a recruitment strategy**
- **Staff Procedural Flow Charts- Details steps for starting new staff members**
- **Performance Counselling- Manage and document performance issues**
- **Workplace Investigations- Helps you cover key areas when conducting investigations**
- **Grievance Procedure- Properly handle and document grievance issues**
- **Staff File Management- Helps you manage the hard copy staff files**
- **Staff Termination- Covers key items for processing staff terminations**

## Forms Tree

Similar to Windows Explorer®, the Forms Tree acts as your filing cabinet for staff documents and forms. The contents of the tree changes based on the item selected on the Staff Control Centre Toolbar. A listing of the standard forms for each section is available in Appendix A of this guide.

The Help Overview and Flowchart tab provides you with advice on each section. This is a great overview that can help you increase your confidence in managing staff as you learn more about staff management processes.

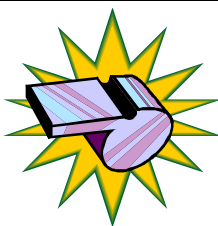
## Forms Toolbar

Use the forms toolbar to perform key functions for each form. Click the buttons to access Print, Preview, Edit, Save as PDF, and Delete functions. HR Coach Staff Systems allows you to create and save your own documents. Standard documents cannot be deleted.

## Forms Display

The form display window displays the form selected in the Forms Tree.

Now that you are familiar with navigating HR Coach Staff Systems, let's walk through some common examples of how to use the HR Coach Staff Systems software.



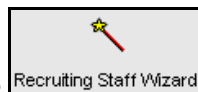
Feel free to explore the HR Coach Staff Systems software!

All of the HR Coach tools have been designed to be user friendly so you can focus on your business.

## Example 1- Recruiting Staff

Penny, your number one staff member that has been with you for 3 years, has decided to take a position with another company. While you are sad to see Penny go, you are terrified to think about all the work involved in replacing her! You haven't had to hire someone in ages. Where are you going to find time to manage all the paperwork and interviewing!?

Here's how you can do it- and it's easier than you think!



- Click on the **Wizards** button. Then click on the **Recruiting Staff Wizard** button. This opens the Recruiting Staff Wizard.
- **STEP 1-** Select if the position is to be filled from external applicants, internal applicants or both. Whenever there is transition in a business, this is an excellent opportunity to review your staff to see if you can promote from within. Tick the External Applicant box. To make changes to the form, select **"EDIT"**.


The screenshot shows a form with a checked checkbox labeled "External Applicant". Below it is a label "Select Application Form" followed by a dropdown menu showing "111 Application Form" and an "Edit" button with a pencil icon.

- **STEP 2-** Select the type of position you are recruiting for- Manager or Staff. This automatically selects the corresponding interview guide and reference check forms. To select a custom form, click on the drop down arrow.

The screenshot shows a form with a selected radio button labeled "Managers Position". Below it are two dropdown menus: "Select Management Interview Guide" with "115 Management Interview Gu" and "Select Management Reference Check" with "116 Management Reference C".

- **STEP 3-** Position Descriptions help you clarify the role. During the recruitment process, position descriptions help you explain the job to applicants and clarify your recruitment strategy. Let's create a Position Description for this role. Click the **"EDIT"** button to open the document.

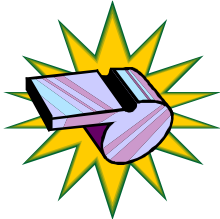
The screenshot shows a dialog box titled "Have you a completed Position Description for this position?". It has two radio buttons: "Yes" (unselected) and "No" (selected). Below "Yes" is a label "Select Position Description form" with a dropdown menu showing "124 Management Position". Below "No" is a label "Complete Position Description now" and an "Edit" button with a pencil icon.

- **Editing Position Description-** Enter the details for this position. HR Coach Staff Systems includes key research into Staff and Management behaviours that help businesses succeed. You can reinforce your business success by communicating these behaviours to your staff members. When you are finished, click the  save button and enter the title for this role. Once saved, you can access this Position Description in the forms tree.

| Management Position Description   |  |
|---|--|
| <b>Instruction for Managers</b>   | <b>Instruction for Staff</b>   |
| 1. Give a copy of Position Description with letter of offer.<br>2. Copy signed Position Description for Staff Member.<br>3. Update the Staff File Manager.<br>4. Place on the Staff File. | 1. Read the Position Description carefully.<br>2. Ask if you need any information clarified.<br>3. Keep a copy for you to use at work.<br>4. This may change with the needs of the Business.<br>5. Keep Manager informed if changes in the position. |
| <b>Position Title:</b> Administration Manager   |  |
| Reporting to  | General Manager  |
| Direct Reports  | Administration Team  |
| Liases with internally  | Financial Controller<br>Operations Manager   |

- **STEP 4-** You're ready to go! Click the **"Print Selected"** button to print out the complete set of documents you need to conduct an Interview and document important Applicant information such as Reference Checks.

|  |                                |                |
|--|--------------------------------|----------------|
| <input checked="" type="checkbox"/> Application Form     | 111 Application Form           | Preview        |
| <input checked="" type="checkbox"/> Interview Guide      | 115 Management Interview Guide | Preview        |
| <input checked="" type="checkbox"/> Reference Check      | 116 Management Reference Check | Preview        |
| <input checked="" type="checkbox"/> Position Description | PD: Administration Manager     | Preview        |
|  |                                | Print Selected |
|  |                                | Print All      |



Your HR Coach can help you refine your recruitment strategy to ensure you attract the best candidates for your business.

Your HR Coach can also help you understand why people leave your business and help you implement strategies to retain your talented staff.

## Example 2- Starting a New Staff Member

You have completed the recruitment process and decided to extend an offer to Sarah Smith. You know you need to generate a formal letter of offer and make sure you get the paperwork ready for Sarah's first day. This takes the average business owner up to 8 hours to complete. Let's see how long it takes with HR Coach Staff Systems.



- Click on the **Wizards** button. Then click on **Start Up Staff Wizard**. This opens the Start Up Staff Wizard.
- **STEP 1-** Select the type of position from the options available. The selection you make on this screen ensures you are able to input the correct information for this role.

Is this a management or staff position?

Management Position       Staff Position

Is the offer for a Wages/Agreement staff member or salaried staff member?

Wages/Agreement Member       Salaried Member

- **STEP 2-** Enter the details for the offer by completing the fields on the form. HR Coach Staff Systems prompts you for key information so important details are not overlooked. Once you have completed all of the fields, click **"NEXT"**.

**Step 2 of 5**

Personal Data  
 First Name: Sarah      Last Name: Smith

Employment Information  
 Start Date: 5/22/06      Position Title: Manager      Position Reporting To: Director  
 Probationary Period: 3 Months      Annual Salary Rate: 45000      Payment Procedure: Fortnightly

Salary Inclusions  
 Shift Penalties  
 Leave Loading  
 Overtime  
 Public Holiday  
 Superannuation

Salary Exclusions  
 Shift Penalties  
 Leave Loading  
 Overtime  
 Public Holiday  
 Superannuation

Source: Ad      Super Rate %: 9

Benefits:

Allowances?  List of Allowances:

Leave Entitlements (including sick and other leave):

Termination Notice Period  
 During Probation 1 weeks notice, or payment in lieu. After Probation 4 weeks notice, or payment in lieu.

Is Leave Loading Applicable? No

Have you the following? - Resume, Application Form, Completed Interview Guide and Reference Checks?: Yes

Performance Review Schedule: 3 Monthly


Authorising Manager Title: Director

- **STEP 3-** Congratulations! You have just created a personalised Letter of Offer and employment contract. Click **"EDIT"** to view the form.

**Step 3 of 5**

**Letter of Offer for Wages**

Select the Letter of Offer: 121 Wages & Agreement Letter of O

The details of the offer have been automatically completed on the second page. You can make additional edits at this time but be sure to click  to save your changes. If you don't make any changes, the letter is automatically saved with the staff name in the Starting Staff section of the forms tree.



- **STEP 4-** Click on the down arrow to select the position description that you created in Example 1.

- **STEP 5-** You're ready to print out 2 copies of the documents (1 copy for your files, one for Sarah to keep). Just click **"PRINT ALL"** and you're done!

- But that's not all HR Coach Staff Systems does for you! A reminder is automatically sent to your Microsoft Outlook® so you don't forget key dates like start date, probationary periods and performance review dates.



- HR Coach Staff Systems also tracks Critical Dates for each staff member in the Staff File Manager. You can even add your own Critical Dates and send reminders directly to Microsoft Outlook®.

| Staff Record Sheet: Sarah Smith      |               |                |                |           |
|--------------------------------------|---------------|----------------|----------------|-----------|
| General                              | Staff Info    | Critical Dates | Archived Dates | Documents |
| Item                                 | Critical Date | Reminder Date  | Reminder Note  |           |
| ▶ Start Date for Sarah Smith         | 4/1/06        | 4/1/06         |                |           |
| Performance Review: Sarah Smith      | 7/1/06        | 7/1/06         | 3 Monthly      |           |
| Sarah Smith: One Week to Probation D | 9/21/06       | 9/21/06        |                |           |
| Sarah Smith: Probation Due Date      | 9/28/06       | 9/28/06        |                |           |



Start your employment relationship the right way! Talk to your HR Coach about effective orientation programs designed to increase staff productivity, performance and satisfaction.

## Example 3- Updating Staff File Manager

Sarah has just completed her first day with your company. She even told you how impressed she is with the professionalism of the documents. Her last company never even had her sign a contract! Sarah has returned her signed paperwork, which you have filed in her staff file. Now, let's update HR Coach Staff Systems.



- Click on the **Wizards** button. Next click **SFM** to open the Staff File Manager.
- When you completed the Starting Staff Wizard in Example 2, Sarah's information was automatically added to the Staff File Manager. Click on Sarah's name and select **"EDIT"** to open the record.

| Personal Data  |          |            |               |                |
|----------------|----------|------------|---------------|----------------|
| Payroll Number | Surname  | First Name | Date of Birth | Department     |
| 008            | Brookes  | Linda      | 23/03/2052    | Administration |
| 016            | Davidson | Johna      | 26/10/1975    | Accounts       |
| 007            | Green    | Sally      | 23/04/1978    | Operations     |
| 012            | Johnson  | Peter      | 01/04/1962    | Operations     |
| 001            | Jones    | Jenny      | 15/11/1972    | Administration |
|                | Smith    | Sarah      |               |                |

- The Staff Record Sheet allows you to record key data about staff. The "Start Up" section allows you to tick off the documents you have received from Sarah. Tick the "Signed Letter of Offer", "Staff Action Form" and "Tax Dec" form.

You can quickly view any outstanding information for your staff by printing the Staff Compliance Report.

Staff Record Sheet: Sarah Smith

**General** | **Staff Info** | **Critical Dates** | **Archived Dates** | **Documents**

**Personal Data**

Payroll No.  Surname  First Name   
 Date of Birth  Department  Position Title

**Recruitment**

Source  Start Date  Status   Resume, Interview Guide & Ref. Checks

Wage  Salary Hourly Rate \$/hr  Salary Rate \$   Leave Loading

Salary Inclusions:  Shift Penalties  Leave Loading  Overtime  Public Holiday  Superannuation

Salary Exclusions:  Shift Penalties  Leave Loading  Overtime  Public Holiday  Superannuation

**Start Up**

Signed Letter of Offer  Staff Action Form Completed  ID on File - Copy on File  
 Signed Position Description  Tax Declaration / Super. Form on File  Orientation Checklist Signed

**Performance Review**

Probation Due Date  Performance Review Month  Last Performance Review or Interview Rating   
 Probation Review Completed  Performance Review Completed

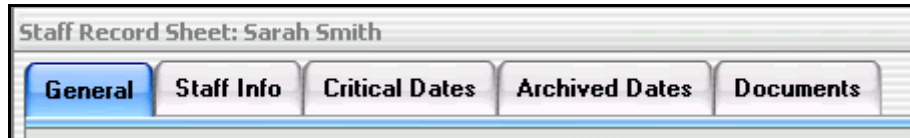
**Mandatory Training**

Mandatory Training 1  Mandatory Training 2   
 Mandatory Training 1 Completed  Mandatory Training 2 Completed

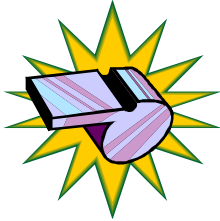
OK Cancel

Staff File Manager – Staff Record Sheet

## Additional Tabs in Staff Record Sheet



- The **Staff Info** tab has fields for Addresses, Emergency Contact Details, Bank and Superannuation details.
- The **Critical Dates** tab allows you to track important date sensitive information for each staff member such as license expiration, required training activities, mandatory testing, etc. The critical dates section is very flexible and even allows you to send reminders to Microsoft Outlook®.
- Use the **Archived Dates** tab to store historical Critical Dates.
- The **Documents** tab allows you to link external files to the staff record for easy referencing.




The HR Coach Staff Systems is designed to be flexible and complement the other systems you have in your business.

Talk to your HR Coach about how you can get the maximum benefit from your software.

## Reports

We all know that there is a mountain of legislation regarding employment. You can help reduce your business risk by ensuring that you have complete and up to date information on your staff files. Let's take a look at one of the reports you can print from the Staff File Manager- the Staff Compliance Report.

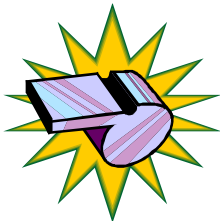


- Click  to open the Staff File Manager. Then click .
- Select the Staff Compliance Report and click **“PREVIEW”**.



| Payroll Number | Surname  | First Name | Department     | Position  | Resume, Int. Guide & Ref. Checks | Signed Letter of Offer | Staff Action Form | Copy ID of File |
|----------------|----------|------------|----------------|-----------|----------------------------------|------------------------|-------------------|-----------------|
|                | Andrew   | Larry      |                | Sales     | No                               | No                     | No                | No              |
|                | Smith    | Bob        | Administration | Manager   | No                               | Yes                    | No                | Yes             |
|                | Williams | Samantha   |                | Reception | No                               | Yes                    | No                | No              |

- At a glance, the Staff Compliance Report alerts you to key risk areas by highlighting missing information on your staff files. Its important that you update the Staff Record in the Staff File Manager to ensure the Staff Compliance Report is accurate.
- You can also print other reports (including the very important Birthday Report!) from the Reports menu in Staff File Manager. You can also view listings of the Critical Dates you have entered for staff members.



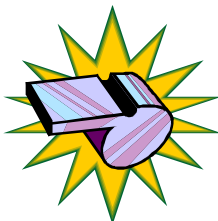
Your HR Coach can help you review you business reporting procedures to ensure that you have the information you need- without mountains of paperwork.

Talk to your HR Coach for more information.

## Appendix A

The following table lists the stand forms in the HR Coach Staff Systems software. You can customise all of the forms and add your own documents to the system.

| Process                             | Standard Forms  |  |
|-------------------------------------|---|--|
| <b>Recruiting Staff</b>             | Application Form<br>Internal Vacancy<br>Position Description – Staff<br>Position Description – Manager<br>Interview Guide – Staff   | Interview Guide – Manager<br>Reference Check – Staff<br>Reference Check – Manager<br>Recruiting Staff Wizard   |
| <b>Starting Staff</b>               | Letter of Offer – Wages and Agreement<br>Letter of Offer – Salary<br>Orientation Checklist – Staff  | Orientation Checklist – Manager<br>Staff Action Form<br>Starting Staff Wizard  |
| <b>Staff Information Management</b> | Leave Application Form<br>Timesheet Group<br>Expense Claim Form<br>Staff Action Form<br>Action Plan Master<br>Staff Warning Form<br>Staff Termination Form<br>Staff Counselling Form<br>Staff File Manager Database<br>Staff File Manager Reports<br>Getting Started Wizard<br>Meeting Agenda<br>Meeting Minutes<br>Staff Talk Memo<br>Policy Index | Policy Shell<br>Equal Employment<br>Opportunity Policy<br>Anti Discrimination Policy<br>Harassment and Victimisation Policy<br>Workplace Bullying Policy<br>Grievance Procedure Policy<br>Confidentiality Policy<br>Code of Conduct Policy<br>Email and Internet Usage Policy<br>Healthy and Safe Environment Policy<br>Self Audit Checklist |
| <b>Managing Staff Performance</b>   | Performance Review – Staff<br>Performance Review – Manager<br>Staff Satisfaction Survey   | Salary Review Offer<br>Salary Review Wizard<br>Exit Survey<br>Staff Exit Checklist   |
| <b>Motivational Tools</b>           | Certificate of Recognition<br>Certificate of Service  | 10 Motivational Signs  |
| <b>Business Reports</b>             | Staff Monthly Report<br>Staff Risk Report<br>Training Needs Analysis<br>Staff Year Planner<br>Staff Compliance Report<br>Current Staff Report<br>Employment Status Report   | Length of Service Report<br>Terminated Staff Report<br>Performance Review Report<br>Recruitment Source Report<br>Birthday Report<br>Critical Dates Report  |



Your HR Coach can help you with customising and developing forms to suit your business.

Contact your HR Coach today for more information.