How to Set Up an Employee File

SUMMARY

The Driver/Employee Earning, Pay and Scheduling module allows the user to set up a profile with available fields for address, phone numbers, e-mail address, driver's license, social security, birth date, driving record, and employment/termination dates. This module allows the user to create a predetermined payment rate, with the ability to calculate the driver's pay automatically for each trip by the hour, by percentage or a flat rate. Once a file has been created and a driver's name is entered on a reservation, the driver's pay will automatically be calculated.

❖ A record can be created for the times that an employee is available to work and the user will be prompted if they are booking a driver for a run who is unavailable.

❖ A listing of drivers' runs in date sequence for a specified pay period, for trips paid or not paid and a complete history of a driver's past runs is available.

❖ A report of earnings, gratuities and reimbursements that are due is available.

❖ Credits or debits to the employee's pay such as deductions for advances can be recorded.

❖ A DMV and Drug Check prompt for expired driver's license and drug checks are also available.

HOW TO SET UP AN EMPLOYEE FILE

The Employee file integrates with the Driver/Employee Earning, Pay and Scheduling module.

1. On the upper menu or side icon toolbar click on **Tables** then click on **Employee**. A window will appear for adding, editing or deleting an employee file. Click on **Add**.
2. In the **Employee Id** field type an Id for the employee such as their last name. If there are two employees with the same last name, the user can assign a number after the name or a nickname.
3. Type in the **Name**, **Address**, **City**, **State**, **Country** and **Zip**.
4. A field is available to enter the **Birth Date** and date **Hired**. A field is also available to input a date **Terminated**, if it becomes necessary.
5. The user can select a date in the future for a driver **DMV Check** and a **Drug Check**. The system will prompt the user on the reservation screen if a driver is booked for a run and these dates have expired.
6. Fields are available for **Home Phone**, **E-mail**, **Work Phone**, **Pager Phone** and **Code**.
7. A field is available to enter the **Type** of pager, such as Nextel. This field integrates with the Driver Paging and Text Messaging module.
8. Fields are available for an **Emergency** phone number and any applicable **Code** such as *82 and the **Fax** number.

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9. Fields are available to type in the driver's **License** number **State** and the **Expiration** date. If the employee has a driver's license in two states, a second set of fields are available for that information. When the driver is booked for a run, the system will prompt the user if the driver's license has expired.
10. Click on or tab to **Page 2**.
11. Select from the pull down window the **Employee Type** such as Driver or Dispatch.
12. Fields are available for **Social Security**, **Pay Period**, **Marital Status** and **Exemptions**.
13. Fields are available depending on how the employee is paid. If the employee is paid on a **Salary** basis, input the amount as a memory jogger. If the employee is paid on an hourly rate, input the amount per hour in **Hourly 1**. If the employee is paid a different hourly rate when performing a different task, input this amount in **Hourly 2**. If an employee is paid a flat rate or a percentage per job, enter this amount in **Flat Rate** or **Percentage**. If the Flat Rate is different for different types of jobs, leave this field blank and the amount can be entered on page 2 of the reservation screen.
14. The **Driver Availability** chart allows the user to designate when a driver is available. Type an **X** on the day and time that the driver is available. If **Driver's Hours** under **System Defaults** is checked, when the user books a driver for a run and they are not available, the system will prompt the user.
15. Click on **Save** then click on **Close**.

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