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MINISTRY OF HEALTH-ETHIOPIA

HRIS User Manual

A practical guide on how to use HRIS to manage health worker human resources

Version 1.1 April 2021

Version 1 December 2020

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ACRONYMS

FMOH	Federal Ministry of Health
HRIS	Human resources information system

ABOUT THIS DOCUMENT

This document is a manual to help users understand the features and functions of the FMOH's human resource information system (HRIS).

OVERVIEW

A HRIS helps an organization manage its workforce more effectively and efficiently. Using the system, Human Resource (HR) professionals can create a centralized information base on all HR management aspects such as standard titles, job classifications and job descriptions spreading over geographic locations, offices, and facilities.

HR staff can solicit job applications for open positions, assign employees to fill positions and maintain a searchable database of all employees, their identifying information and their qualifications. Managers can track each employee's history with the organization, including their position and salary histories, and record the reason for departure when the employee leaves.

HRIS's primary role is to manage workers employed through the FMOH at the ministry, regional, hospital, zonal, and woreda level. A decision maker can analyze this data to answer key human resource management and policy questions, such as:

- Are employees deployed in positions that match their qualifications and education?
- Are employees optimally deployed in locations to meet needs?
- How many workers need to be recruited to fulfill anticipated vacancies?
- Are pay rates equitable across similar jobs?
- Are employees being promoted in alignment with competencies?
- What are the reasons for employee attrition?

HRIS Access

Accessing HRIS

HRIS is a database management system that can be accessed on a computer or a shared network. To access this system you need the address of the computer where HRIS is installed.

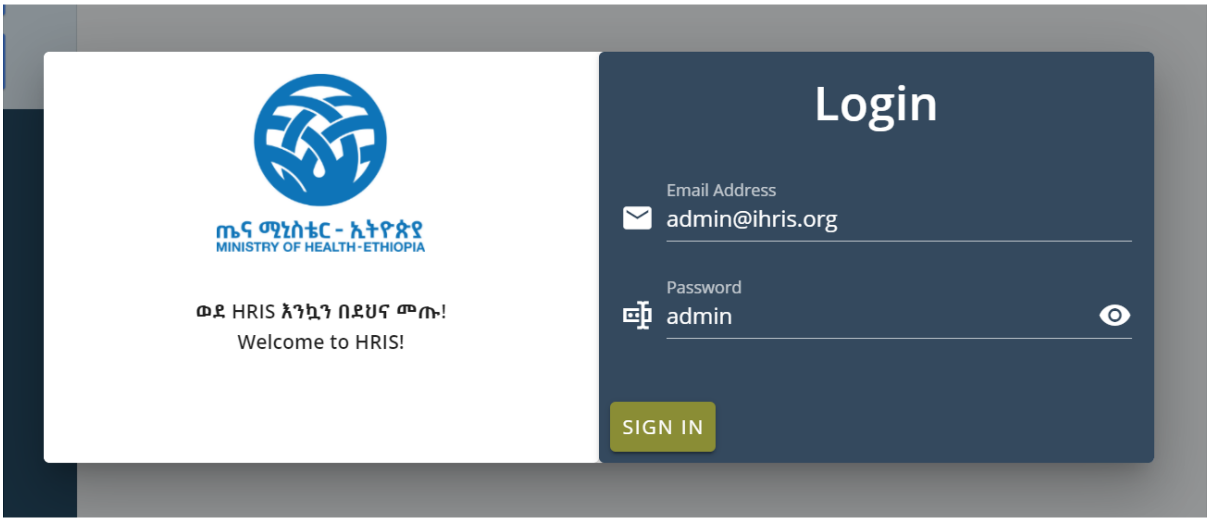
The system is accessed online by typing ihris.sandboxaddis.com in the browser (e.g. Chrome, Firefox, Internet Explorer, Safari), or clicking the above link.

Log In

To gain access to the system, you must have a user account. Go to www.ihris.sandboxaddis.com

Click “sign in with iHRIS” and log in using your iHRIS login username and password.

Type your user name and password and click Login. Remember your password is case sensitive.



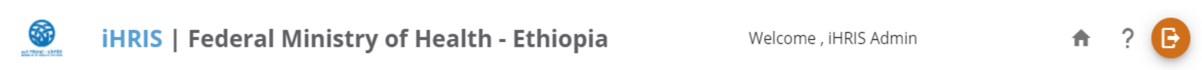
Note: If you do not have a user account, contact your System Administrator.

Log Out

When you are finished working in the system, log out to prevent any unauthorized person from accessing the system.

In the upper right corner on any page, click the logout icon.

If you are idle on the system for 15 minutes, the system will automatically time out and close your session.



User Access

User Roles

User role limits the activities that the person can perform in the system and helps enforce data quality and management protocols.

System Administrator: allows access to all system functions and ensures that the system is functional. The Administrator has full access and can view any record and perform any action in the system in addition to managing user accounts. They can also add lookups in the Admin section.

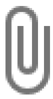
HR Manager/Case Team Lead: manages all system data and ensures that data is complete, correct and up to date. The HR Manager defines reports and analyzes data for HR decisions. The HR Manager/Case Team Lead can only access health worker records associated with their facility.

HRIS Officer: adds, views and updates data in the system, as well as viewing reports. The HR Manager ensures the integrity of the data entered by HRIS Officers. The HRIS Officer can only access records associated with their facility. They approve data that is entered by the Data Encoder. They can create job positions.

Data Encoder: registers new health worker records in the system. The Data Encoder can only access records associated with their facility. They can update profiles but not create positions.

Navigation

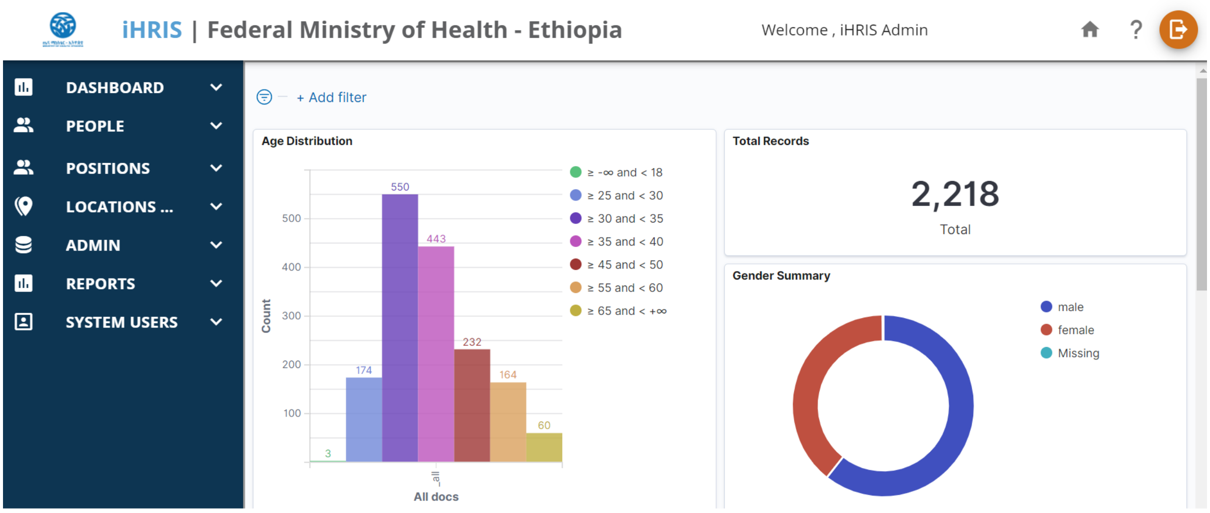
Common icons

	Home
	Help
	Log out
	Log in
	To previous page; to next page
	Search
	Clear search term(s) / filter(s)
	Required field
	Drop down list
	Upload an attachment
	Expand a closed menu
	Collapse an opened menu

	Open page
	Add another entry
	Delete last entry
	Use calendar selector
	Switch between Ethiopian and Gregorian calendars

Home page

You can get to the home page at any time by clicking the FMOH logo in the top left corner or the home icon in the top right corner.



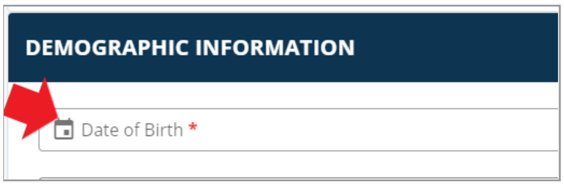
The left side navigation bar offers shortcuts to the Dashboard, People, Positions, Locations/Facilities, Admin, Reports, and System Users. *Note: some of the modules may be inaccessible, depending on the access permissions for your account.*

These modules can also always be reached through the menu on the left sidebar (highlighted in red). When you click on the module name you will see the sub-menu options displayed.

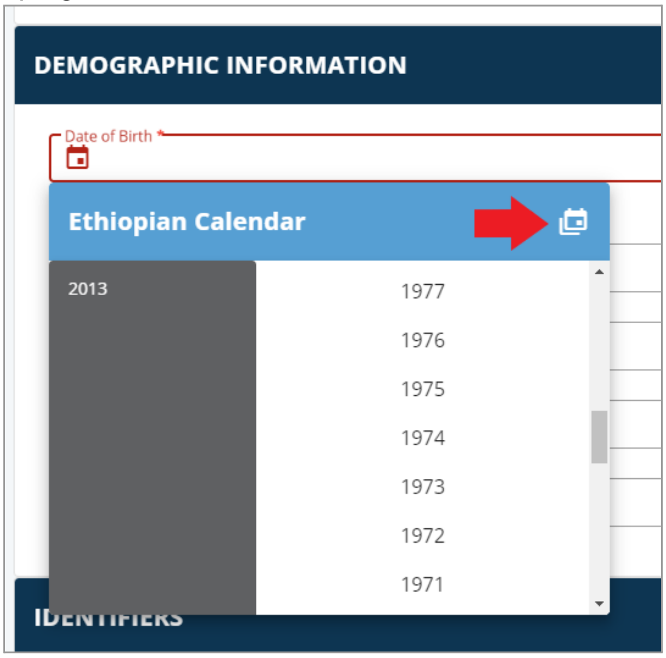
- People allows users to track a person in the database. It is the primary registration page to add new employees, search records, and make changes to existing staff records.
- Positions allows users to search for positions by job, facility, directorate, case team, or employment status; edit positions; and add positions.
- Locations/Facilities allows users to search locations by name, type and jurisdiction, and edit existing location records or add new locations. You can also search for a facility by name, facility type, and facility physical type; edit facility records; and add new facility records.
- Admin allows users to view and edit the elements that are included in all of the dropdown lists throughout the system.
- Reports allows users to view custom reports and search records according to search filters
- Dashboard allows users to view and customize visualizations and reports on data within the system.
- System Users allows users to search for and add authorized users.

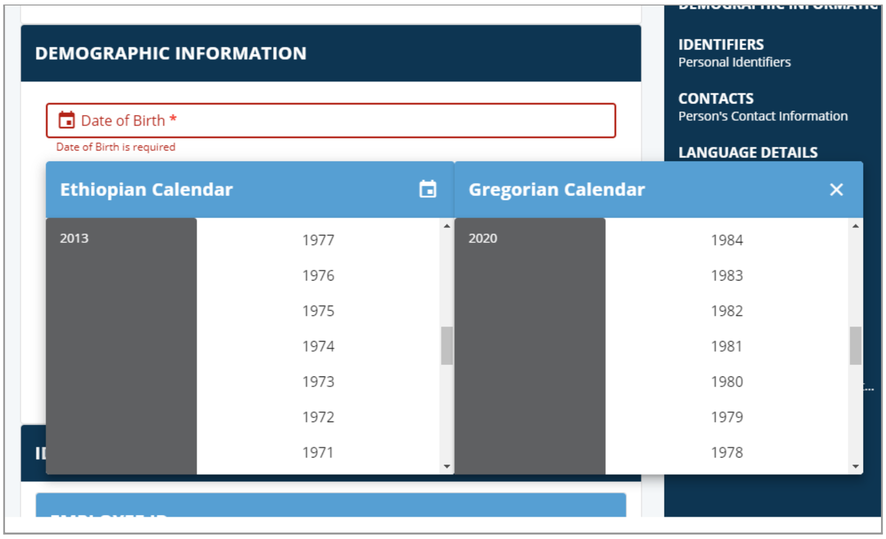
Calendar

There are several date fields throughout the system. To select a date, click on the calendar icon.



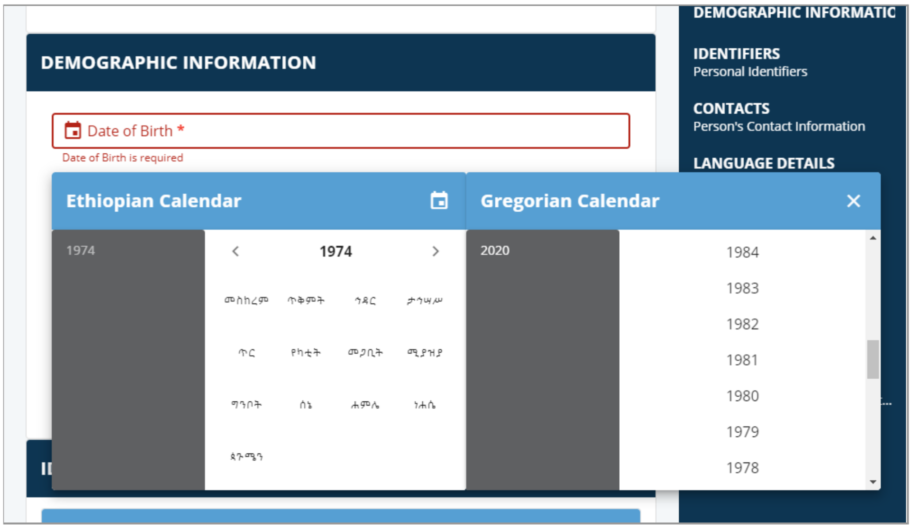
The Ethiopian calendar will display as the default. To view the Gregorian calendar, select the calendar icon in the top right corner.

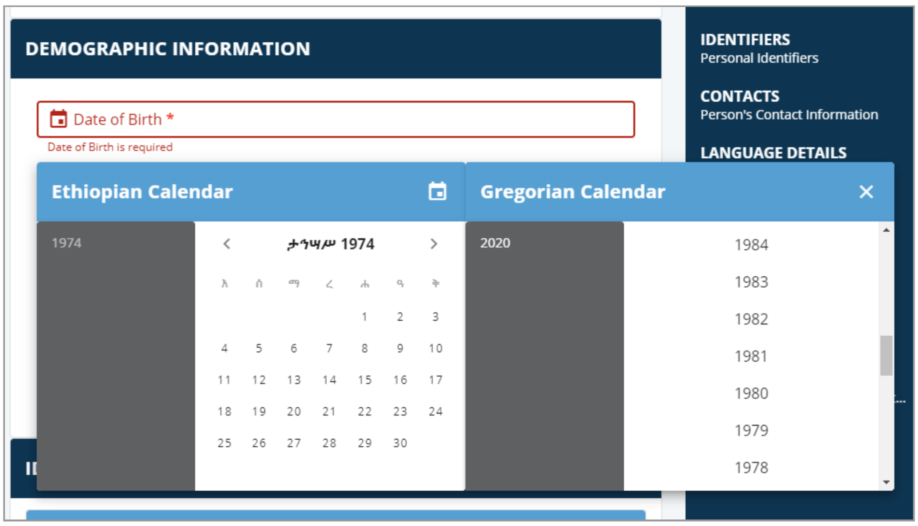




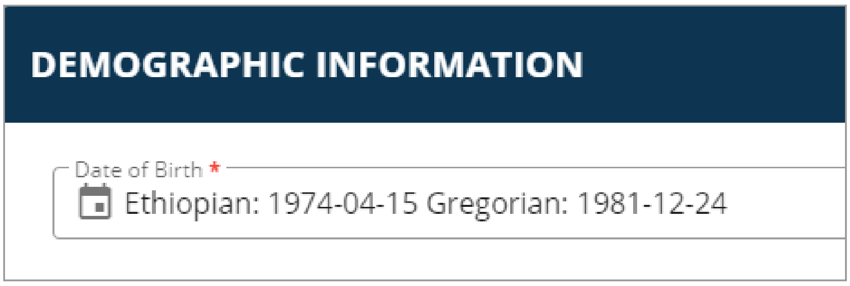
In either calendar, scroll up or down and click on a year to select a year.

Next, click on a month, and then click on the date.





Both the Ethiopian and the Gregorian dates will appear in the field.

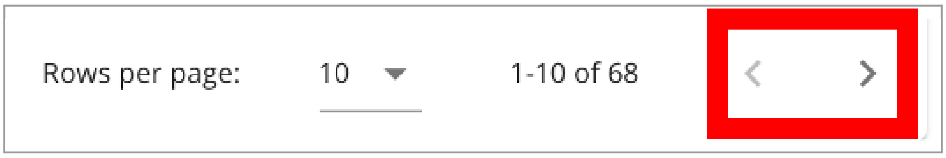


Viewing Tables

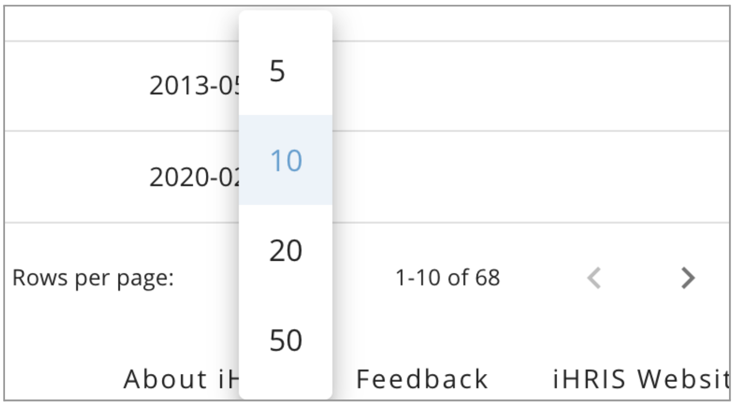
Tables are used to display an overview of data in the system. There are tables for employee records, positions, and locations/facilities.

By default you will see 10 rows of results per page. To go to the next page of results scroll down to the bottom of the table. In the bottom right corner you will see the number of rows being displayed per page followed by which results within the full set that are displayed (for example, "1-10 of 68" means the first 10 results within the set of 68 are being displayed).

You can use the backward and forward pointing arrows to navigate through the pages of results.

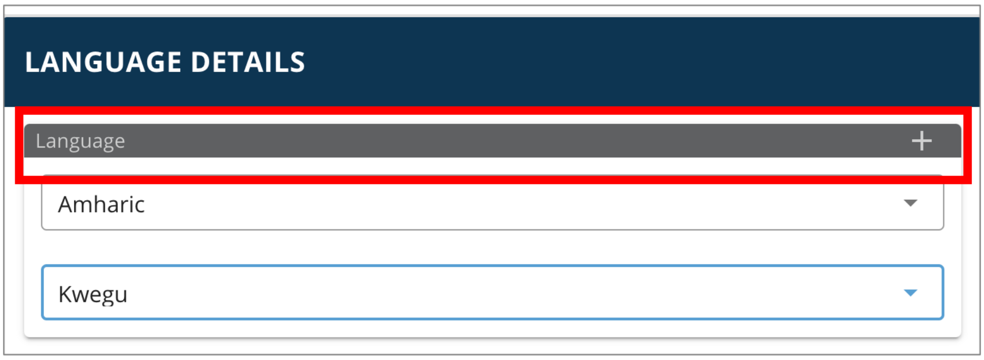


You can change the number of records that display by clicking on the number with a down arrow that is next to "Rows per page:" at the bottom right corner of the results table. You can choose to display 5, 10, 20 or 50 records by clicking on the corresponding number. The table will update once you have made your selection.

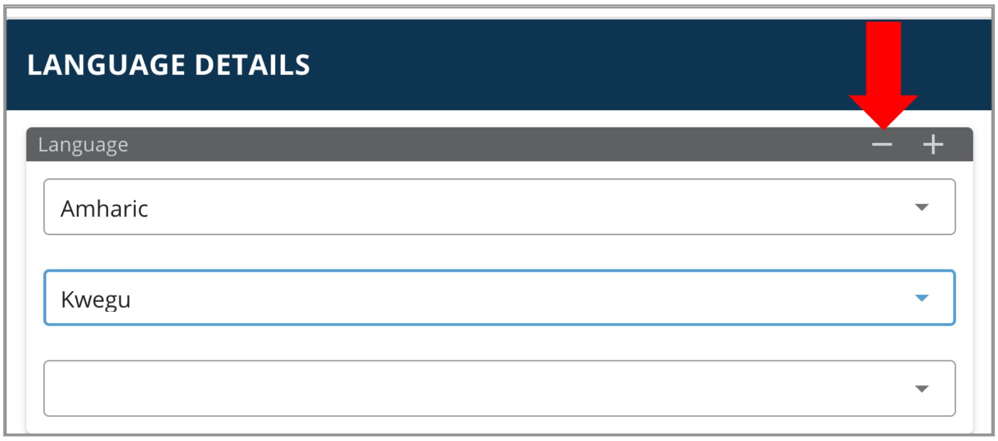


Adding more than one entry for a record component

For some fields it will be possible to include more than one entry. For example, an employee may speak multiple languages or may have more than one dependent. If you see a dark gray bar at the top of a field with a plus sign at the right corner of the bar, this denotes a field that can have multiple entries.



To add another entry, click on the plus sign and a second field (or set of fields) will appear. You can continue adding entries by clicking several times on the plus sign, or if you have added too many entries you can delete the last entry you added by clicking the minus sign that appears next to the plus sign.



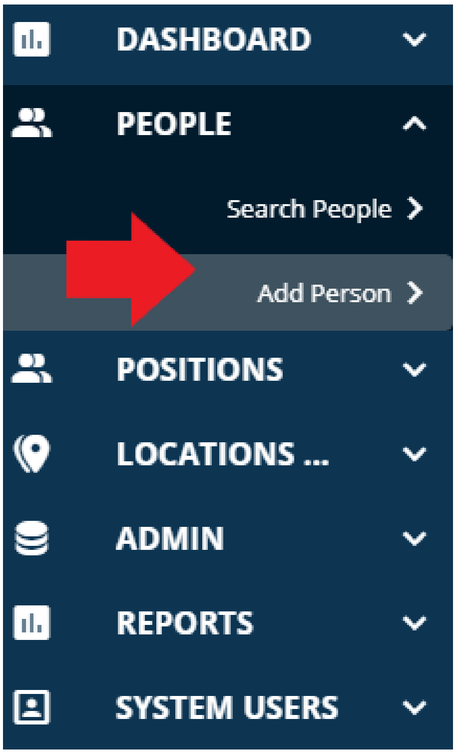
People

This module enables you to track an employee in the database. It is the primary registration page to add new employees, search records, and make changes to existing employee records.

Add Person

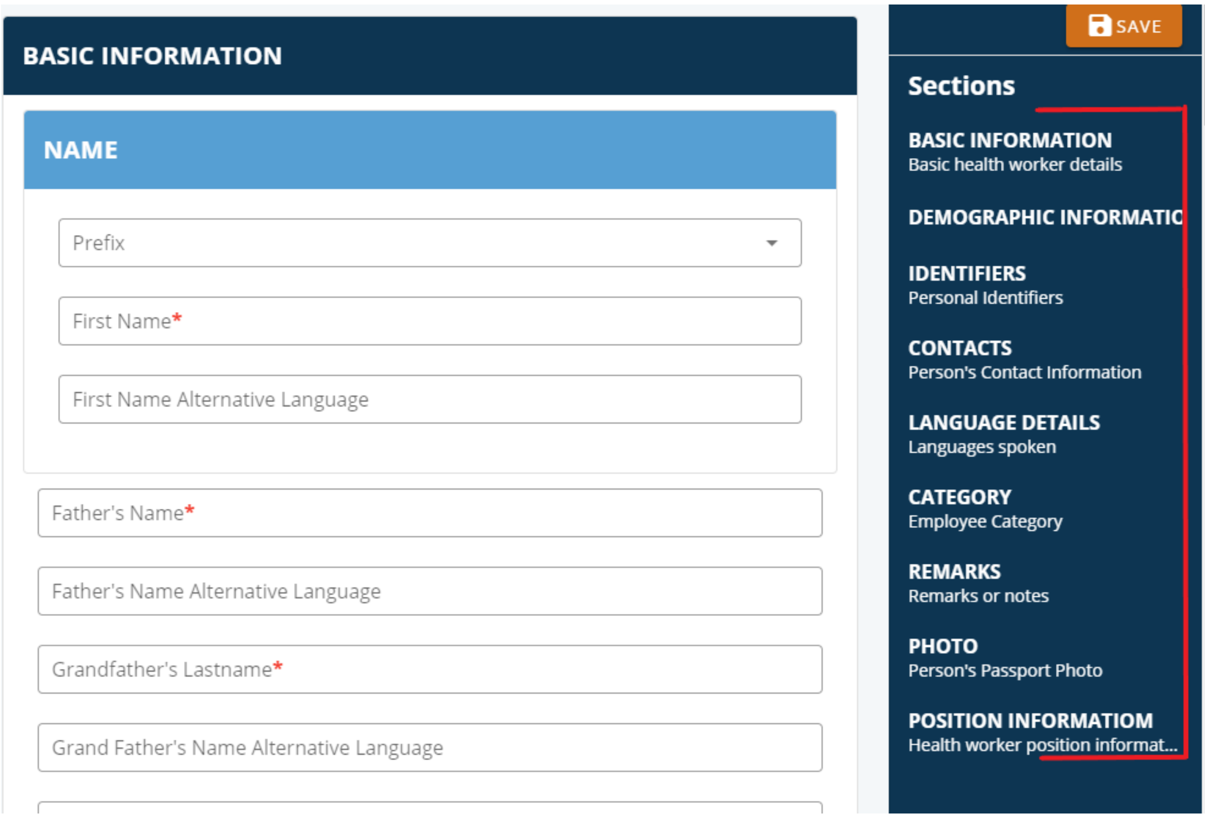
On this page you can create a new employee record by adding information to the fields. To create a new employee record,

1. Click "**Add People**" on the left side navigation bar.



You can also add a new employee record from the Search People page. At the top of the table displaying employee records, click on the button in the right corner that says "**Add Health Worker Information**".

2. Add information to the record. Here are a few tips:
   - The page is broken into multiple sections. You can scroll down to go to a different section, or click on a section from the right sidebar to skip directly to that section.



Tips, continued:

- Fields that are required are indicated with a red asterisk.
- Unless otherwise noted you should type the information directly into the space provided.
- Dropdown lists are available for some fields and are noted in the list below.
- With most of the dropdown lists you can start typing the word that you wish to enter and you will be taken to it in the list, rather than scrolling through the whole list.
- For other fields you will type the information directly into the space provided or you will select the date on a calendar. (See instructions for the calendar selector in the Navigation section)
- For some fields it will be possible to include more than one entry. (See instructions for adding more than one entry in the Navigation section)

The following information can be entered on the People records:

Name

- Prefix
- First name (required)
- First name alternative language
- Father's name (required)
- Father's name alternative language
- Grandfather's last name (required)
- Grandfather's last name alternative language
- Mother's Full name (required)
- Mother's name alternative language

Demographic Information

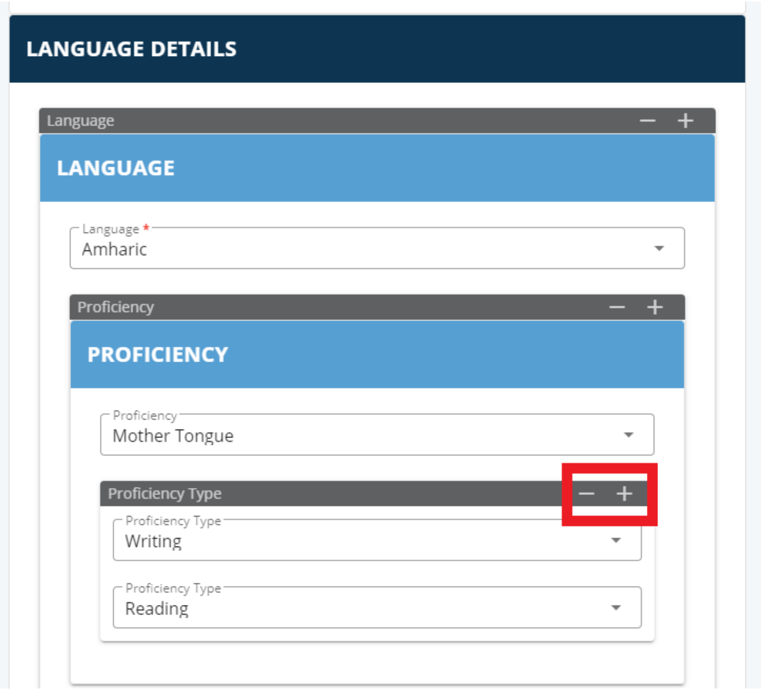
- Date of birth (required, select date from calendar)

- Gender (required, select from dropdown)
- Marital status (select from dropdown)
- Nationality (select from dropdown)
- Ethnicity (select from dropdown)

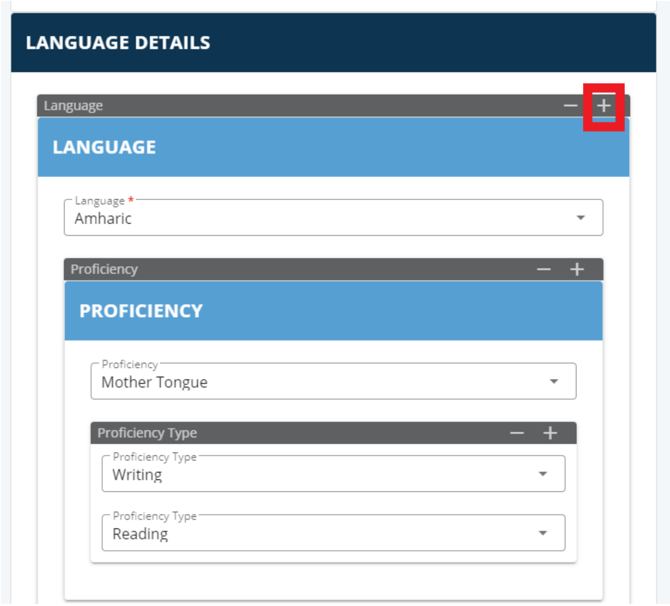
<u>Identifiers (identification numbers)</u>
- Employee ID (required)
- Pension number
- TIN number
- Civil service ID
- License ID
- File number (required)
- Driving License
    - Driving License Type (select from drop down)
    - Driving License ID

<u>Contacts</u>
- Mobile phone
- Work Phone
- Work email
- Residence (required)

<u>Language Details</u>
- Language (select the plus sign to add language)
    - Language (select from dropdown list)
    - Proficiency (select the plus sign to add proficiency, select from drop down): Select Excellent, Good, Poor, Very Good
    - Proficiency Type (select the plus sign to add proficiency, select from drop down): Select Listening, Reading, Speaking, Writing
    - Click the plus sign if you want to enter a second proficiency or additional proficiency types.
    - Click the minus sign to remove a proficiency or proficiency type



■ To enter a second language, click the plus sign next to Language. Repeat the above steps to Proficiency and Proficiency types for each additional language.
■ See "Adding more than one entry for a record component" in the Navigation section for information on adding multiple entries for one field/section.



Category (select from dropdown list)

- Select Academic (less than Grade 12 education level, Administrative, Health Professional

Remarks

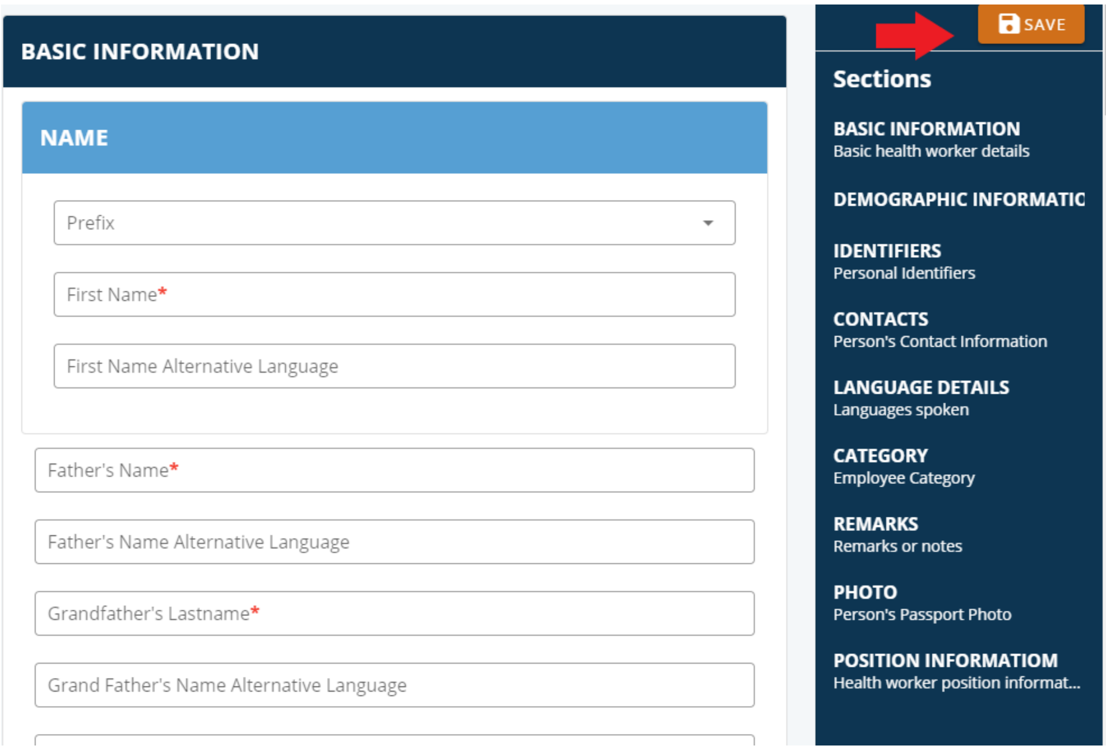
- If you have any general remarks about the employee to record click on the plus sign then type any special remarks regarding the employee into the text box

Photo

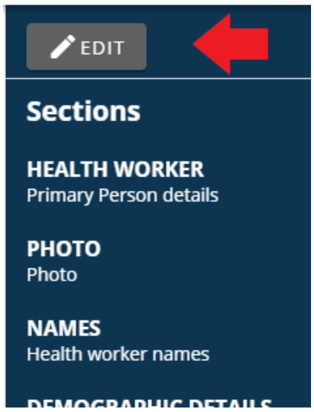
- Upload a photo of the employee by clicking in the blank field. From the pop up window select the file on your computer that you would like to upload as the picture of the employee.

Note that there are additional employee record fields that can only be filled in through editing an existing position (see Edit Person for instructions).

3. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed.



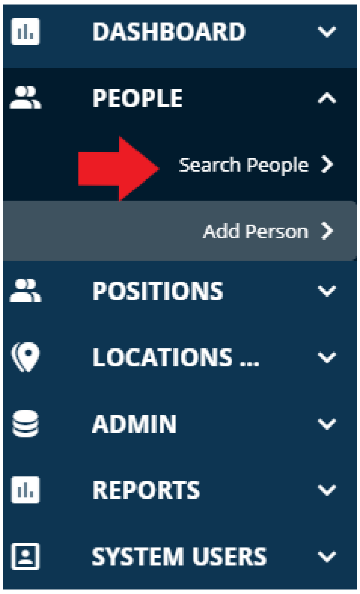
4. If you want to add additional data later, you can search for the employee record (see "Search People"), select the desired record and click "**Edit**" in the top right corner. You can then add additional data to the record or modify data (see "Edit Person").



Search People

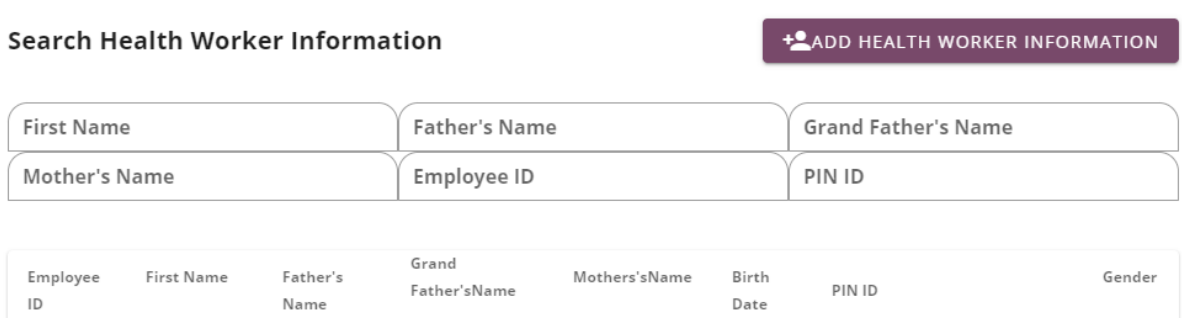
From the left side navigation bar,

1. Click “**Search People**” to search for an employee.



2. Using the search filters, you can search by
    - First name
    - Father’s Name
    - Grand Father’s Name
    - Mother’s Name
    - Employee ID, or
    - PIN ID

   Type part or all of the first name or the employee ID into the corresponding fields. You must hit the "**Enter**" or "**Return**" key on your keyboard to start the search.



3. Records matching your search will be pulled from the database. You can then select a search result to view the full record - this is done by clicking anywhere in the row of the record you want to view. See the tips in the Navigation section for [viewing the results in the table](#).

Edit Person

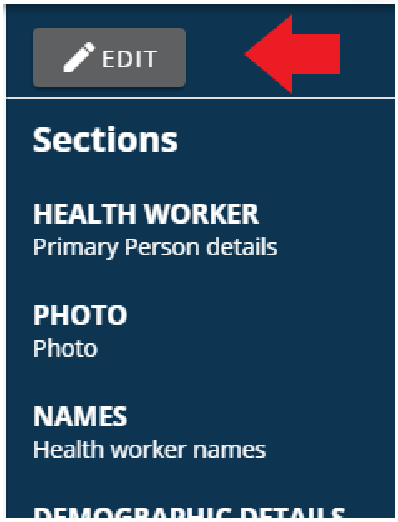
There are two types of information that can be edited in the Person record: the basic information that is included in the initial Add Person form when a new record is being entered, and additional information that would be added once a new employee has started work.

Basic Employee Information

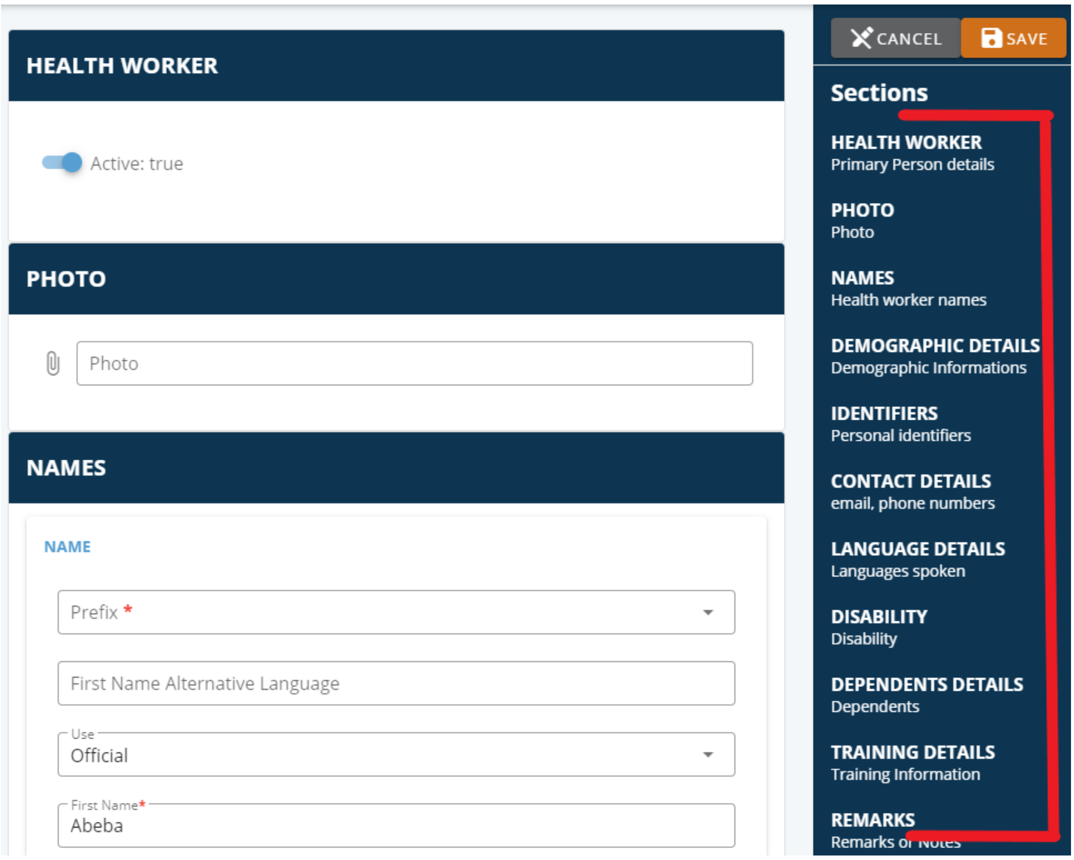
To add or update information in an existing employee record. From the Search People page:

1. Locate the employee record that you wish to modify and click on it to open the record.

2. At the top of the right sidebar click on the "**Edit**" button.



3. Add information to the record. Here are a few tips:
    - The record page is broken into multiple sections. You can scroll down to access a different section, or you can click on a section from the right sidebar to skip directly to that section.



Tips, continued:

- For the fields you wish to edit you can select item(s) from dropdown list(s) or type information directly into the record in any section and field.
- Fields that are required are indicated with a red asterisk.
- Remember that for some fields it will be possible to include more than one entry. (See instructions on adding more than one entry in the Navigation section)

4. The following fields from the Add Person module can be edited after clicking the "Edit" button
    - Photo
    - Names (Basic Information)
    - Demographic Details
    - Identifiers
    - Contact Details
    - Language Details
    - Remarks

5. You can also add or edit additional fields from here, including whether the employee is active, Disability information, Dependent Details and Training Details by clicking the "**Edit" button.**

Disability Details

- Select from the dropdown menu
- Drop down options include: Hearing impaired, mentally impared, mobility impaired, Requires crib, requires crutches, requires gurney, requires walker, requires wheelchair, speech impaired, vision impaired

Dependent Details

- Type dependent name into the field
- Add additional dependants by clicking the plus sign - See "Search People" for information on adding multiple entries for one field
- Dependants name
- Dependent's Date of Birth (select from calendar)
- Relationship (select from dropdown menu)
- Dependent's Gender (select from dropdown menu)

Training Details

- Click the plus sign if you want to enter training information, then type in the training title in the space that appears.
- Indicate the category of the training by selecting an option from the dropdown.
    - Academic (less than Grade 12 education level)
    - Administrative
    - Health Professional)
- Add additional training by clicking the plus sign - See instructions for adding multiple entries for one field/section in the Navigation section.

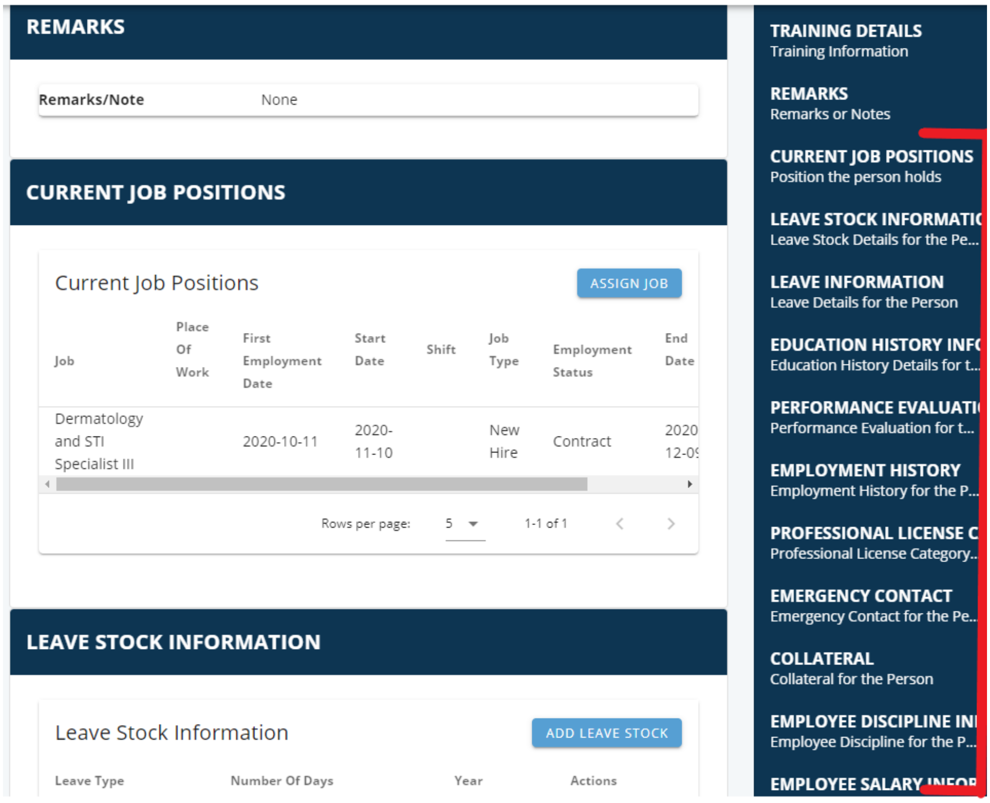
6. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your changes without saving them by clicking the "**Cancel**" button in the top of the right sidebar.

Supplemental Employee Information

There is supplemental information about an employee that can be added to a Person record after it has been created, but it is not accessible when you are in edit mode (making changes after clicking "Edit" at the top of a record). If you are in edit mode you should Save or Cancel. Then you will see the record again and can view the additional information.

1. In the right sidebar list of sections you should scroll down until you see the sections after "Remarks".

2. From here you can either click on a section title in the right sidebar to skip directly to that section or you can scroll down in the record to find the section you want to edit.

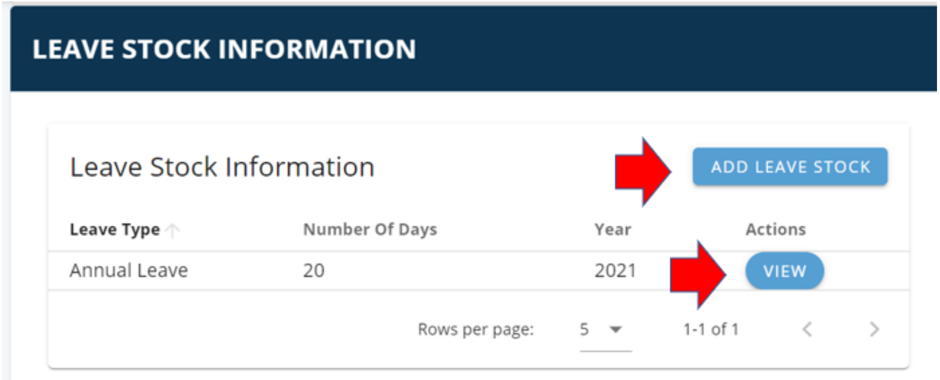


These supplemental sections include:

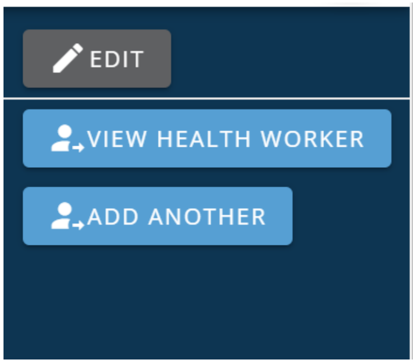
- Current Job Positions
- Leave Stock Information
- Leave Information
- Education History Information
- Performance Evaluation Information
- Employment History
- Professional License Category
- Emergency Contact
- Collateral
- Employee Discipline Information
- Employee Salary Information
- Employee Award Information

3. To edit any of these sections, select the light blue “**Add**” button in the top right corner of the section. See “leave stock” example below:

4. To view existing information, select the light blue “**View**” button. If there is no information in this section, the “View” button will not be available.



5. Once you have selected Add or View, you will be able to edit existing information by selecting the grey “**Edit**” button, and add additional information in this section by selecting the light blue “**Add Another**” button. When you are ready to return to the main Person record, select “**View Health Worker**”.

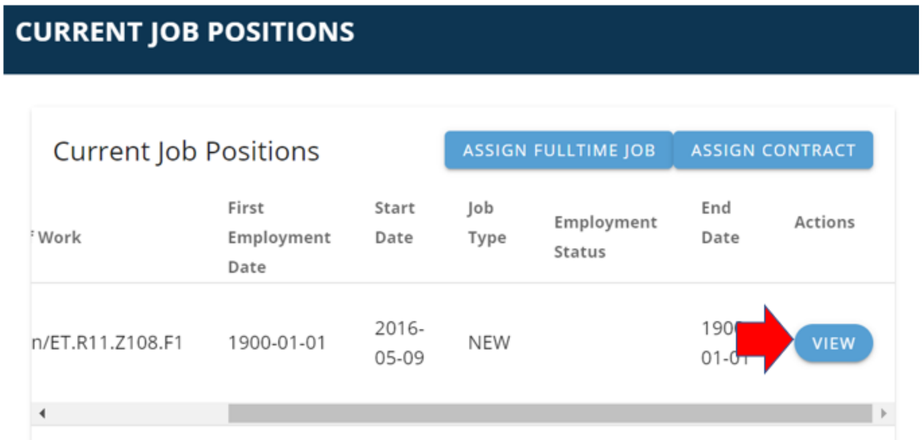


6. You can also cancel your entry at any time by clicking the “Cancel” Button on the top right corner.

<u>Current Job Positions</u>

For employees that are currently employed, in this section you can View their current position or Assign a Fulltime Job or Assign a Contract.

a. Scroll across the table to the furthest right column and you will see the options to View.

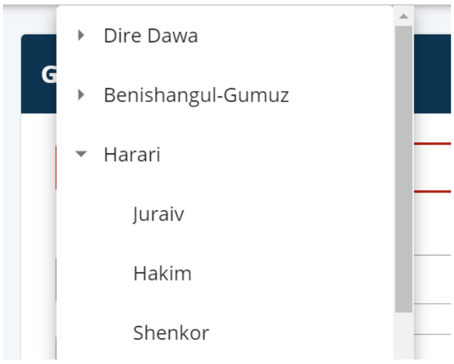


b. Clicking "**View**" will pull up the corresponding Position record. You can view the position details and also make changes to the Position by clicking on "**Edit**" in the top right corner of the page.

i. Add information about the Position record. Unless noted you should type the information directly into the space provided for each field.

You can add or edit the following information in this section:

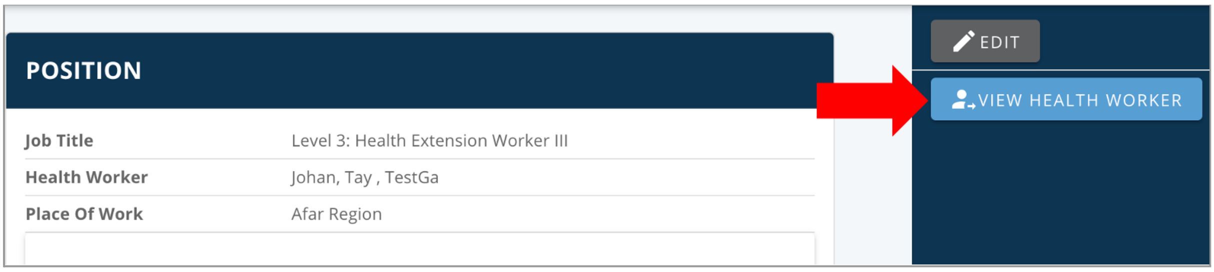
- Job title (required, start typing for selection from dropdown list)
- Health Worker name (view only)
- Facility/Place of work (required)
    - Click on the Region to select it, or, click on the arrow beside the Region to see the corresponding Zones, then
    - Click on the Zone to select it, or click on the small grey arrow beside the Zone to see the corresponding Woredas, then
    - Select the Woreda



- Department/Case Team (required, start typing for selection from dropdown list)
- Hired date (required, select from calendar)
- End date (select from calendar)
- Currency (Salary) (select from dropdown list)
- Salary
- Employment status (select from dropdown list)
- Position Status (required, select from dropdown list)
- Job type (required, select from dropdown list)
- First employment date (select from calendar)
- Job information remark
- Reason for change/departure (select from dropdown list)
- Reason for change (select from dropdown list)
- Salary scale (select from dropdown list)
- Status (click true/false)

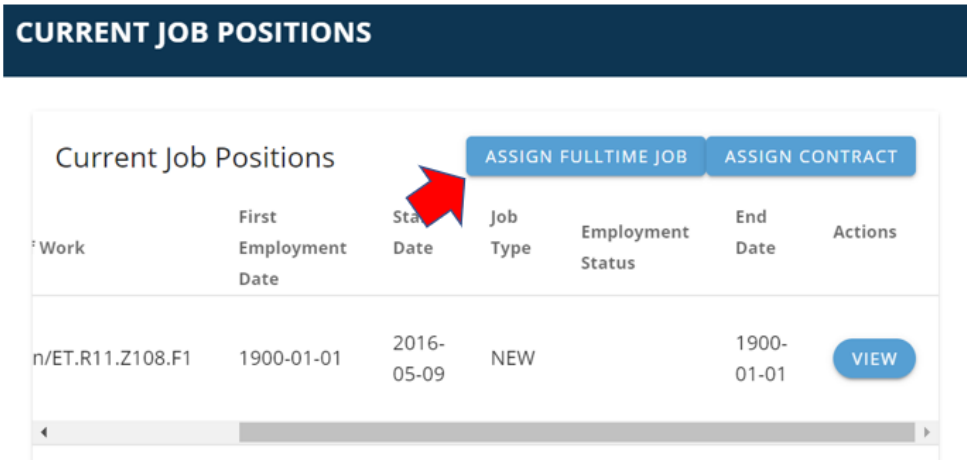
ii. If you do edit the Position record information, when you are done making changes to the position you should click on "**Save**" at the top right corner. If you do not wish to make any changes, click on "**Cancel**".

iii. Once you have hit “Cancel” or “Save”, you can click on "**View Health Worker**" in the top right corner of the page to take you back to the employee's Person record.



c. Click “**Assign Full Time Job**” to assign a new Full Time Job Information

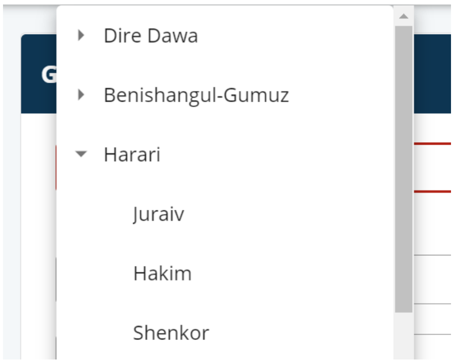
i. Add information about the Position record. Unless noted you should type the information directly into the space provided for each field.



You can add or edit the following information in this section:

- Job title (required, start typing for selection from dropdown list)
- Place of work (required)
    - Click on the Region to select it, or, click on the arrow beside the Region to see the corresponding Zones, then

- Click on the Zone to select it, or click on the small grey arrow beside the Zone to see the corresponding Woredas, then
- Select the Woreda



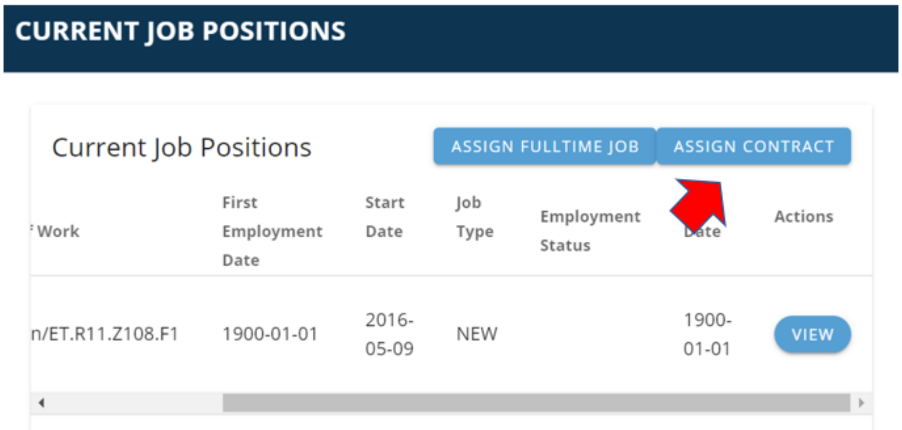
- Directorate/Department/Case Team
- Job type (required, select from dropdown list)
- First employment date (select from calendar)
- Hire date (required, select from calendar)
- Salary scale (required, select from dropdown list)
- Salary
- Remark

ii. If you do edit the Position record information, when you are done making changes to the position you should click on "**Save**" at the top right corner. If you do not wish to make any changes, click on "**Cancel**".

iii. Once you have hit "Cancel" or "Save", you can click on "**View Health Worker**" in the top right corner of the page to take you back to the employee's Person record.

d. Click "**Assign Contract**" to assign Contract Information

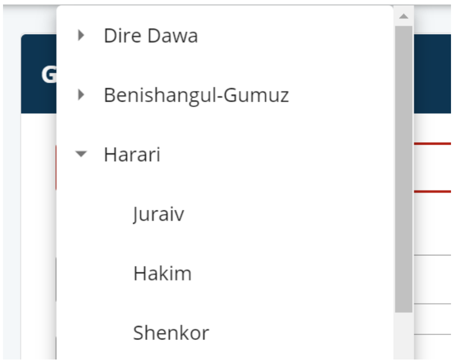
i. Add information about the Position record. Unless noted you should type the information directly into the space provided for each field.



You can add or edit the following information in this section:

- Job title (required, start typing for selection from dropdown list)
- Place of work (required)

- Click on the Region to select it, or, click on the arrow beside the Region to see the corresponding Zones, then
- Click on the Zone to select it, or click on the small grey arrow beside the Zone to see the corresponding Woredas, then
- Select the Woreda

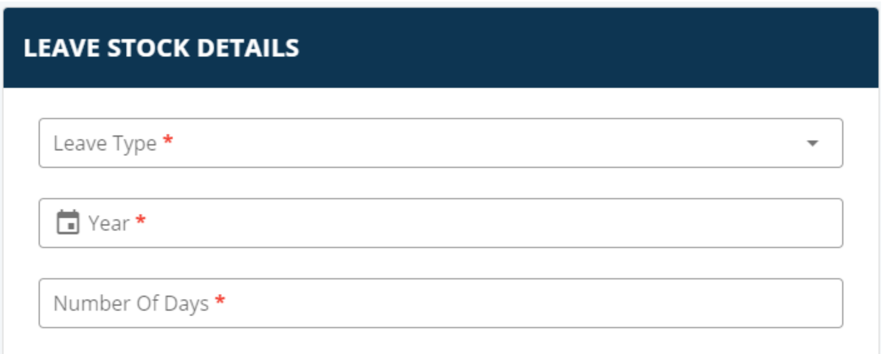


- Directorate/Department/Case Team
- Job type (required, select from dropdown list)
- First employment date (select from calendar)
- Hire date (required, select from calendar)
- End date (required, select from calendar)
- Salary scale (required, select from dropdown list)
- Salary
- Remark

Leave Stock Information

a. To add leave details click on the "**Add Leave Stock**" button. To view or edit existing information click on the "**View**" button.

b. The following details can be added to the employee record:
   - Leave type (required, select from dropdown list)
   - Year (required, select from calendar)
   - Number of days



c. **Please Note*** that the system will only allow leave information to be entered when there is enough leave stock available. For example, if the employee has 20 days of annual leave available and requests 21 in the Leave Information Section, the system will display an error message that the employee does not have enough available leave stock. It is important to ensure the leave stock is entered before the leave request.

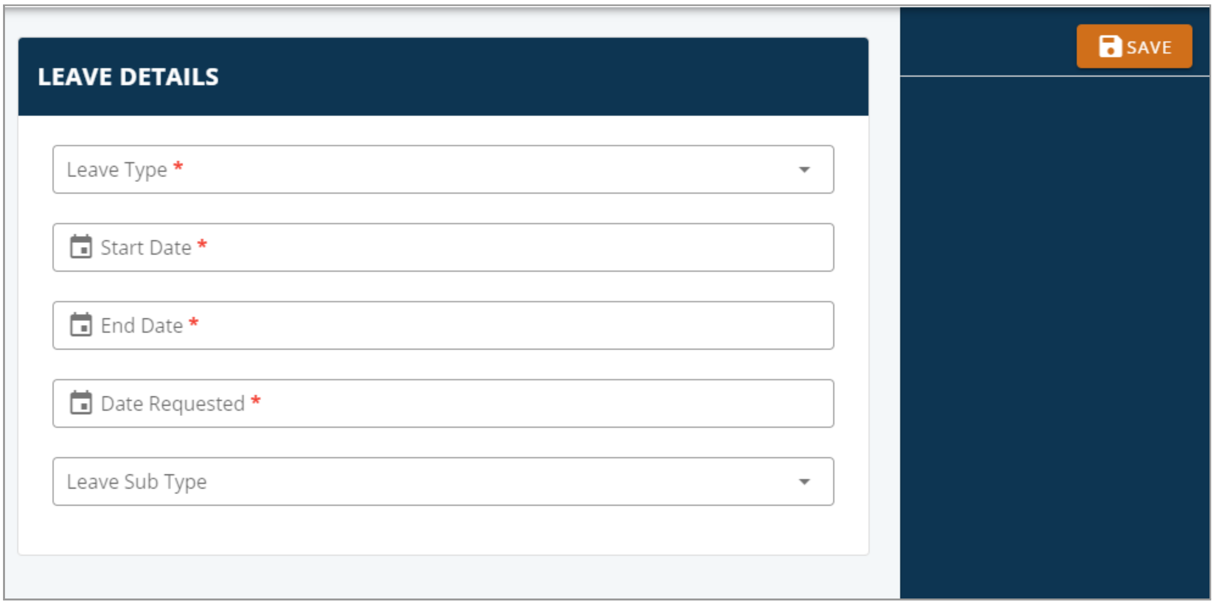
d. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

e. You can add additional Leve Stock by clicking “Add Another” from the right side menu and repeating step “b”.

<u>Leave Information</u>

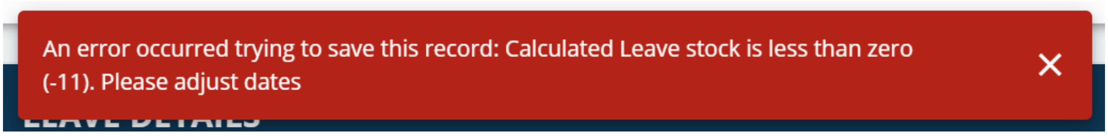
a. To add leave details click on the "**Add Leave**" button. To view or edit existing information click on the “**View**” button.

b. The following details can be added to the employee record:
   - Leave type (required, select from dropdown list)
   - Start and end date of leave (required, select from calendar)
   - The date the leave was requested (required, select from calendar)
   - Leave sub type (select from from dropdown list)



c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed.

d. ***Please Note*** that the system will only allow leave information to be entered when there is enough leave stock available. For example, if the employee has 20 days of annual leave available and requests 21 in the Leave Information Section, the system will display an error message that the employee does not have enough available leave stock. It is important to ensure the leave stock is entered before the leave request.

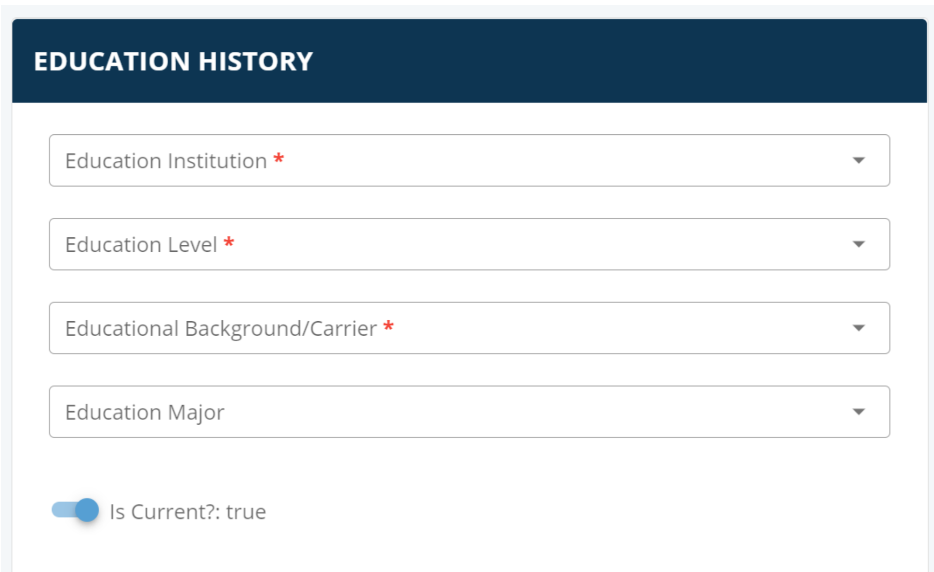


e. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Education History</u>

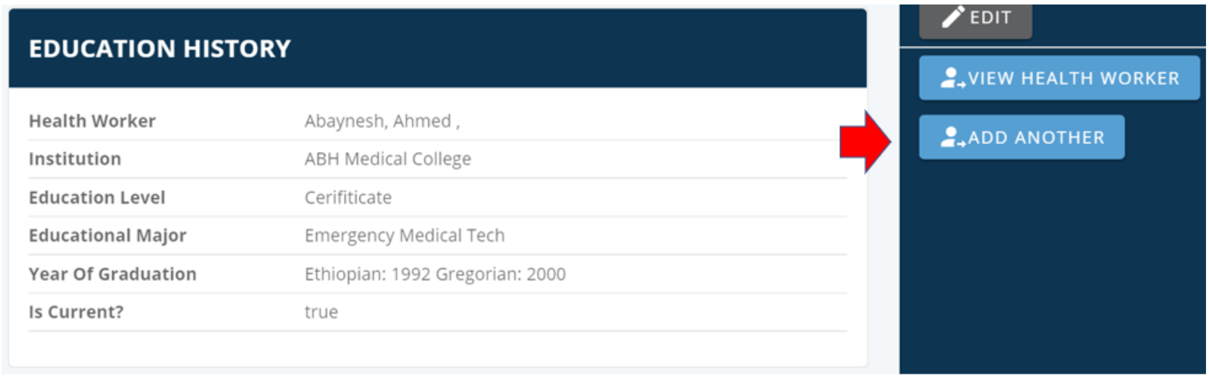
a. To add details about an employee's education history in this section click "**Add Education History**". To view or edit existing information click on the "**View**" button.

b. The following details can be added to the employee record:
   - Education institution (required, start typing for selection from dropdown list)
   - Education level (required, select from dropdown list)
   - Education major (start typing for selection from dropdown list)
   - Year of Graduation (type graduation year into field, enter Ethiopia year or Gregorian year)
   - Is Current (select true or false)

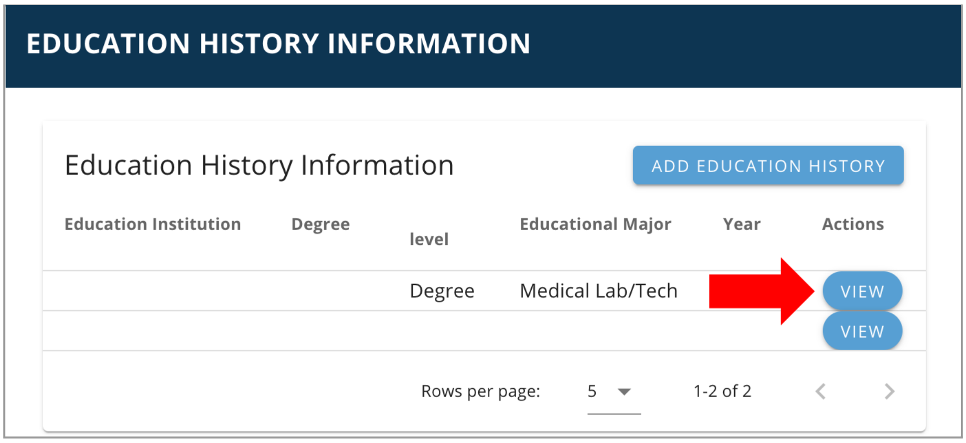


c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

d. You can add additional Education History by clicking “Add Another” from the right side menu and repeating step “b”.



e. You also have the option to view an Education History entry that has already been entered. To do this click on "**View**" in the column furthest to the right.



f. On the page with the details about the Education History entry you can edit the information by clicking on the "**Edit**" button in the top corner of the right sidebar. Although you are not adding a new entry, you can still follow the steps above to edit the information in the entry.

g. You can also add a new Education History entry from this page by clicking on the "**Add Another**" button. Then follow the steps listed above for adding a new entry.

h. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed.

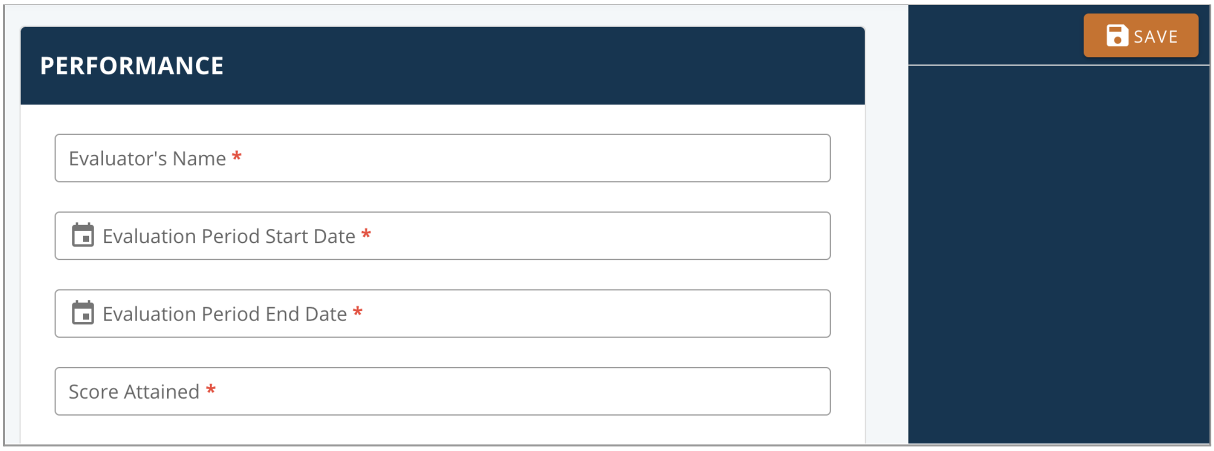
<u>Performance Evaluation Information</u>

a. To add details about an employee's performance evaluation information in this section click "**Add Performance Evaluation**". To view or edit existing information click on the "**View**" button.

b. Add performance evaluation information to the record. Unless noted, you should type the information directly into the space provided.

The following details can be added to the employee record:

- Evaluator's name (required)
- Evaluation period start date (required, select from calendar)
- Evaluation period end date (required, select from calendar)
- Score attained (required)
- Performance Type (select from dropdown list)



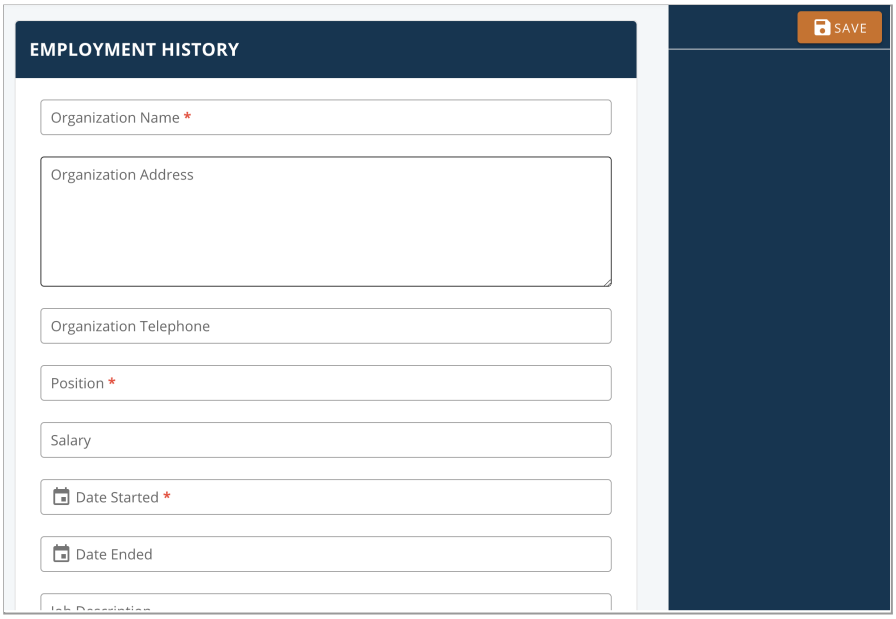
c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Employment History</u>

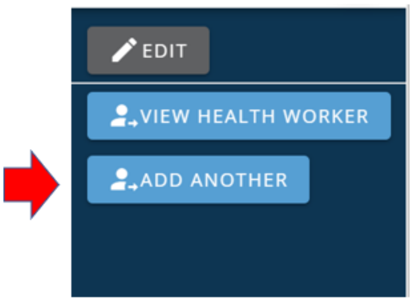
a. To add details about an employee's employment history in this section click "**Add Employment History**". To view or edit existing information click on the “**View**” button.

b. Add information about previous employment to the record. Unless noted, you should type the information directly into the space provided.

   The following details can be added to the employee record:
   - Organization name (required)
   - Organization address
   - Organization phone number
   - Position (required)
   - Salary
   - Date started (required, select from calendar)
   - Date ended (required, select from calendar)
   - Job description
   - Reason for leaving



c. You can add additional Education History by clicking “Add Another” from the right side menu and repeating step “b”.



d. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

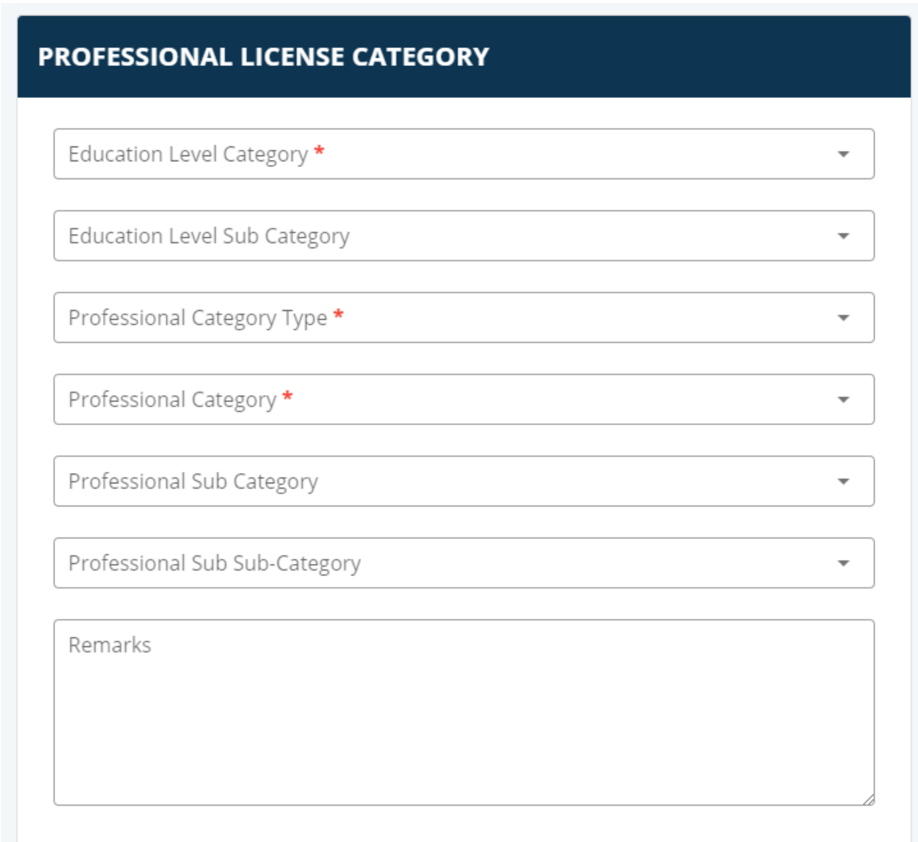
Professional License Category

a. To add professional licenses in this section, click on "**Add Professional License Category**" from the main record. To view or edit existing information click on the “**View**” button.

b. Add the professional license information for the employee. Unless noted, you should type the information directly into the space provided.

   The following information can be saved in the Emergency Contact section:
   - Education Level Category (required,select from dropdown list)
   - Education Level Sub Category (select from dropdown list)
   - Professional Category Type (required, select from dropdown list)
   - Professional Category (required, select from dropdown list)
   - Professional Sub Category (select from dropdown list)
   - Professional Sub Sub-Category (select from dropdown list)
   - License Number
   - Issue Date (select from calendar)
   - Expiry Date (select from calendar)
   - Remarks

c. You can add additional professional licenses by clicking the “plus” sign on the grey bar. See the instructions for adding multiple entries in the Navigation Section.



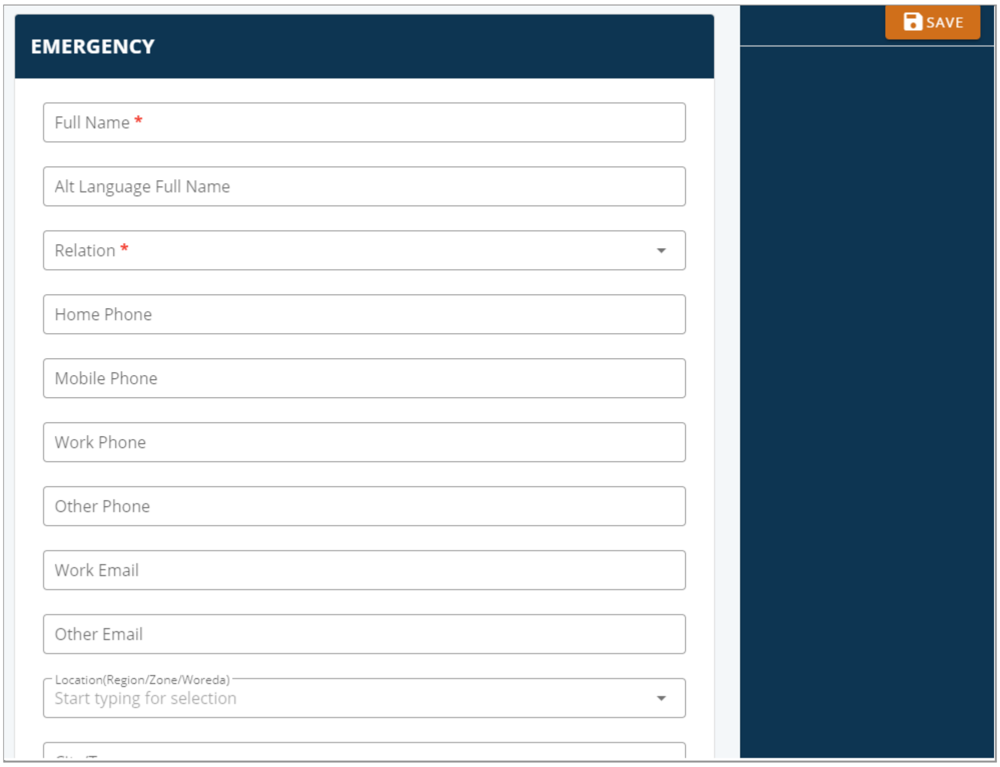
d. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Emergency Contact</u>

a. To add emergency contact information click on "**Add Emergency Contact**" from the main record page. To view or edit existing contacts click on the "**View**" button.

b. Add the emergency contact information for the employee. Unless noted, you should type the information directly into the space provided.

   The following information can be saved in the Emergency Contact section:
   - Full name (required)
   - Alternate language full name
   - Relation (required, select from dropdown list)
   - Home phone
   - Mobile phone
   - Work phone
   - Other phone
   - Work email
   - Other email
   - Location: Region/Zone/Woreda (start typing for selection from dropdown list)
   - City/Town
   - Kebele
   - House number
   - P.O. Box
   - Remark
   - Attachment (select file from your computer)



c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Collateral</u>

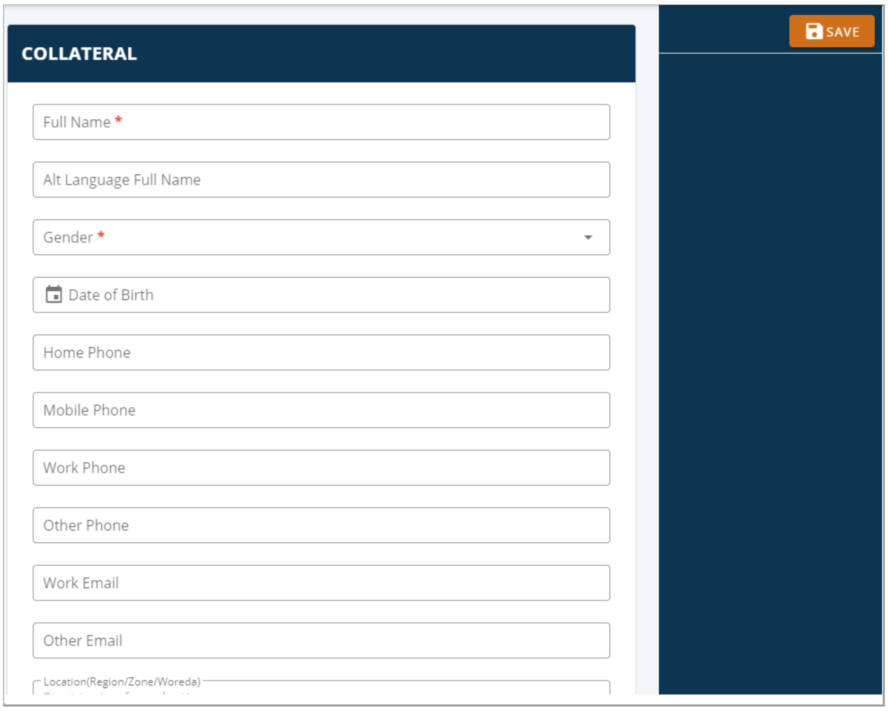
a. To enter collateral information in this section, click on "**Add Collateral**" from the main record page. To view or edit existing information click on the "**View**" button.

b. Add information related to collateral. Unless noted, you should type the information directly into the space provided

The following details can be added as collateral:

- Full name (required)
- Alternate language full name
- Gender (required, select from dropdown)
- Date of birth (select from calendar)
- Home phone
- Mobile phone
- Work phone
- Other phone
- Work email
- Other email
- Location: Region/Zone/Woreda (start typing for selection from dropdown list)
- City/Town
- Kebele
- House number
- P.O. Box

- Salary
- Remark
- Attachment (select file from your computer)



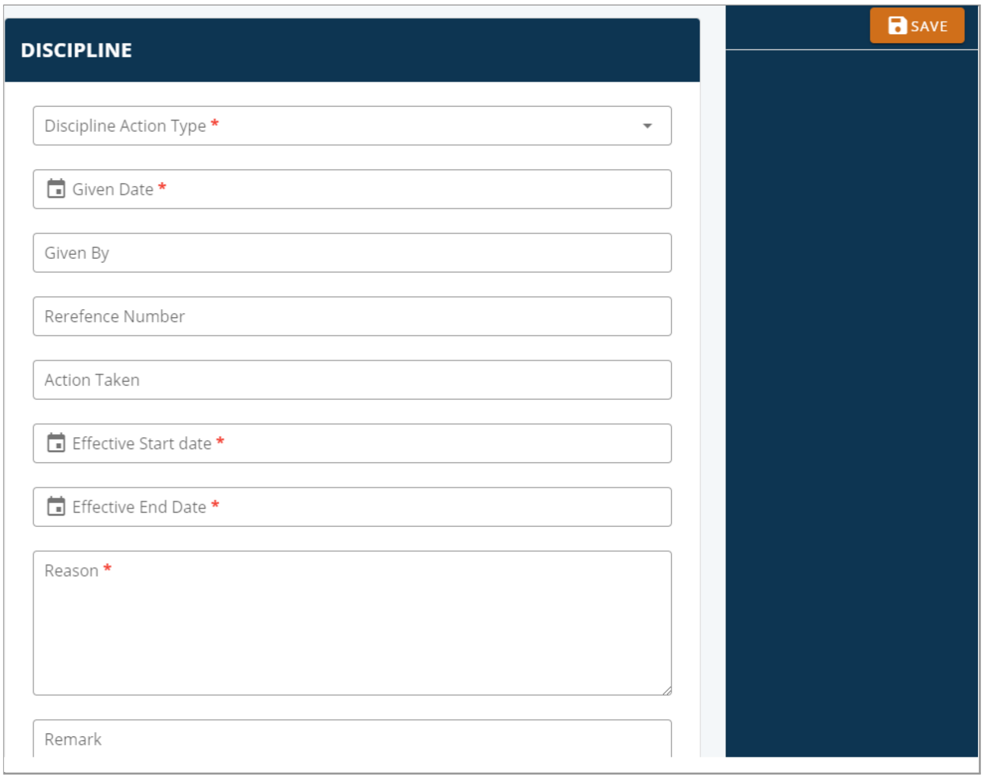
c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Employee Discipline Information</u>

a. To add disciplinary actions in this section, click on "**Add Disciplinary Action**" from the main record page. To view or edit existing information click on the "**View**" button.

b. Add information related to employee discipline. Unless noted, you should type the information directly into the space provided.

   The following can be added to the discipline information:
   - Discipline Action type (required, select from dropdown)
   - Given date (required, select from calendar)
   - Given By
   - Reference Number
   - Action taken
   - Effective start date (required, select from calendar)
   - Effective end date (required, select from calendar)
   - Reason (required)
   - Remark



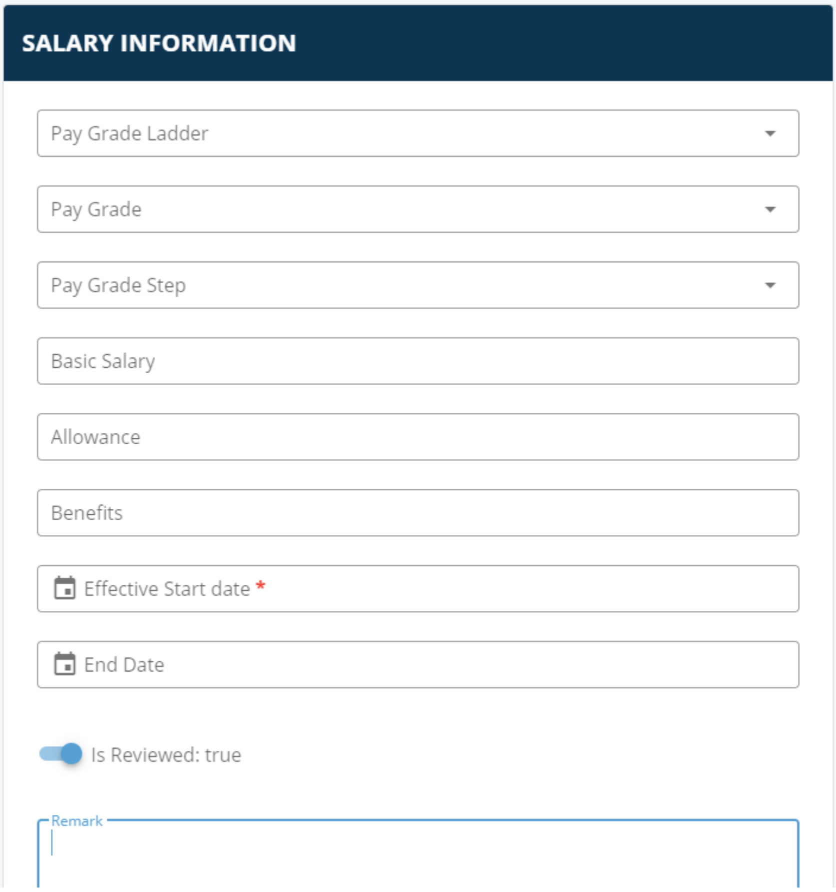
c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Employee Salary Information</u>

a. To add salary information in this section, click on "**Add Salary Info**" on the main record page. To view or edit existing information click on the “**View**” button.

b. Add salary information to the employee record. Unless noted, you should type the information directly into the space provided.

   The following can be added to the salary information:
   - Pay grade ladder (select from dropdown list)
   - Pay grade (select from dropdown list)
   - Pay grade step (select from dropdown list)
   - Basic Salary
   - Allowance
   - Benefits
   - Effective start date (required, select from calendar)
   - End date (select from calendar)
   - Is reviewed (select true or false)
   - Remark
   - Salary fund source type (select from dropdown list)
   - Pay frequency (select from dropdown)
   - Is current (select true or false)



c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

<u>Employee Award Information</u>

a. To add employee award information in this section, click on "Add Award" from the main record page. To view or edit existing information click on the "**View**" button.

b. Add information related to employee discipline. Unless noted, you should type the information directly into the space provided.

   The following can be added to the award information:
   - Title of Award (required)
   - Date of Award (required, select from calendar)
   - Awarding Organization
   - Remarks

c. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. If you do not wish to make any changes, click on "**Cancel**".

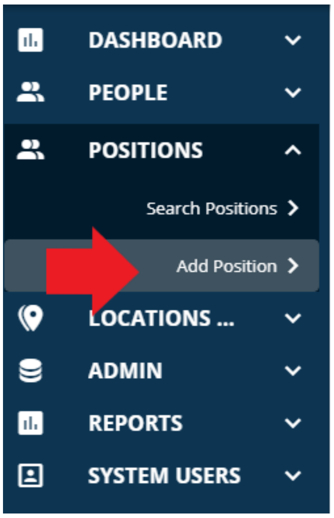
Positions

This module enables you to set up and manage positions in the database. It is the primary place to add new positions, search positions in the system, and make changes to existing positions.

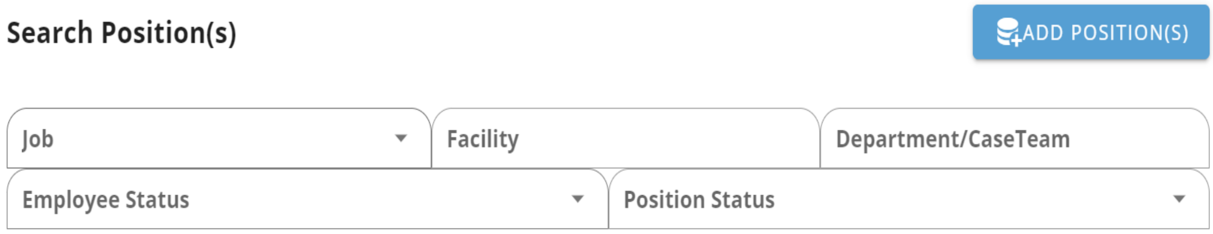
Add Position

On this page you can create a new Position record by adding information to the associated fields. To create a new position:

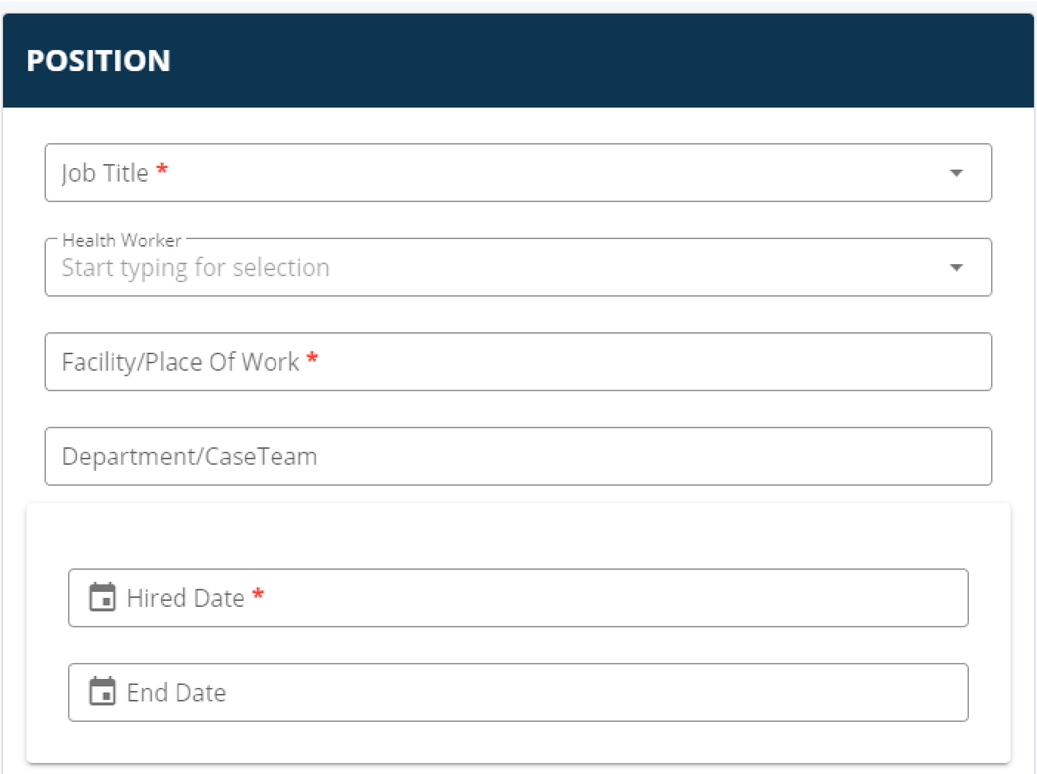
1. Click on "**Add Position**" on the left side navigation bar.



   a. You can also add a new position from the Search Position page. At the top of the table displaying positions, click on the button in the right corner that says "**Add Position**".



2. Add information to the new Position. Here are a few tips:
   - Fields that are required are indicated with a red asterisk.
   - Unless noted you should type the information directly into the space provided for each field.
   - Dropdown lists are available for some fields and are noted in the list below.
   - With dropdown lists you can start typing the word that you wish to enter and you will be taken to it in the list, rather than scrolling through the whole list.
   - For other fields you will type the information directly into the space provided, or you will select the date on a calendar. See the steps for using the calendar selector in the Navigation section.



Note that you can create a position without associating it with a person.

The following information can be entered on the Position page:

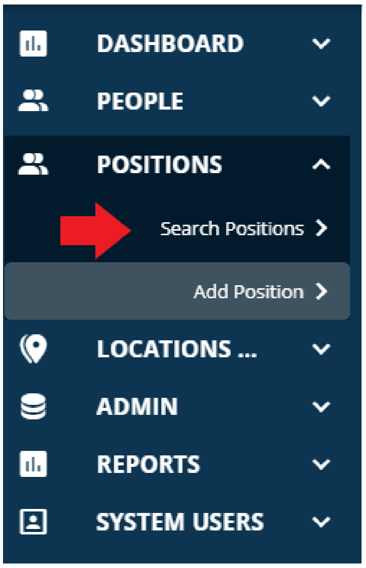
- Job title (required, select from dropdown list)
- Health Worker (start typing name to select from dropdown list)
- Facility/Place of work (required, start typing name to select from dropdown list)
- Department/Case Team (start typing name to select from dropdown list)
- Hired date (required, select from calendar)
    - This is the date the employee signs the employment contract
- End date (select from calendar)
- Currency (Salary) (select from dropdown list)
- Salary
- Employment status (select from dropdown list)
- Position Status (required, select from dropdown list)
- Job type (required, select from dropdown list)
- First employment date (select from calendar)
    - This is the employee's first day of work (used to calculate pension)
- Job information remark
- Reason for Change/Departure (select from dropdown list)
- Reason for Change (select from dropdown list)
- Salary scale (select from dropdown list)
- Status (click to select between true or false)

3. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your entry without saving it by clicking the "**Cancel**" button in the top of the right corner.

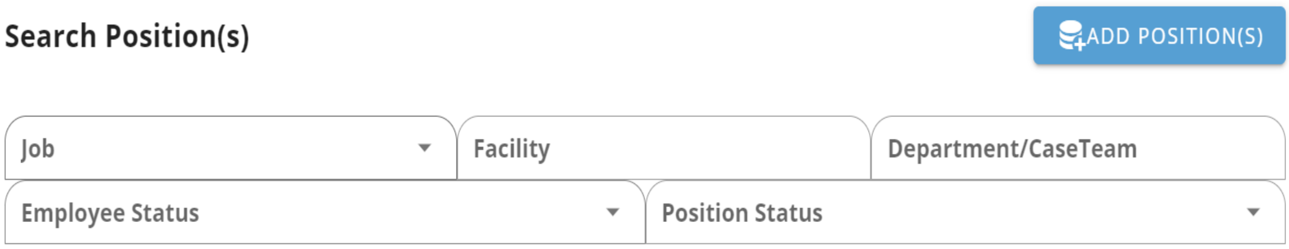
Search Positions

This feature allows you to search existing Positions to access the records for viewing or editing.

1. From the left side navigation bar, click "**Search Position**" to search for an existing position.



a. On this page you can search for positions by job , facility, department/case team, employment status or position status. You can search by job, employee status, or position status by selecting from the corresponding drop down list. You can also search by facility or department/case team by typing part or all of the facility or department/case team into the corresponding fields. When searching by these filters, you must hit the "**Enter**" or "**Return**" key on your keyboard to start the search. You can search by multiple fields or multiple entries within the same field (i.e. by one job and one facility, or by two different jobs).

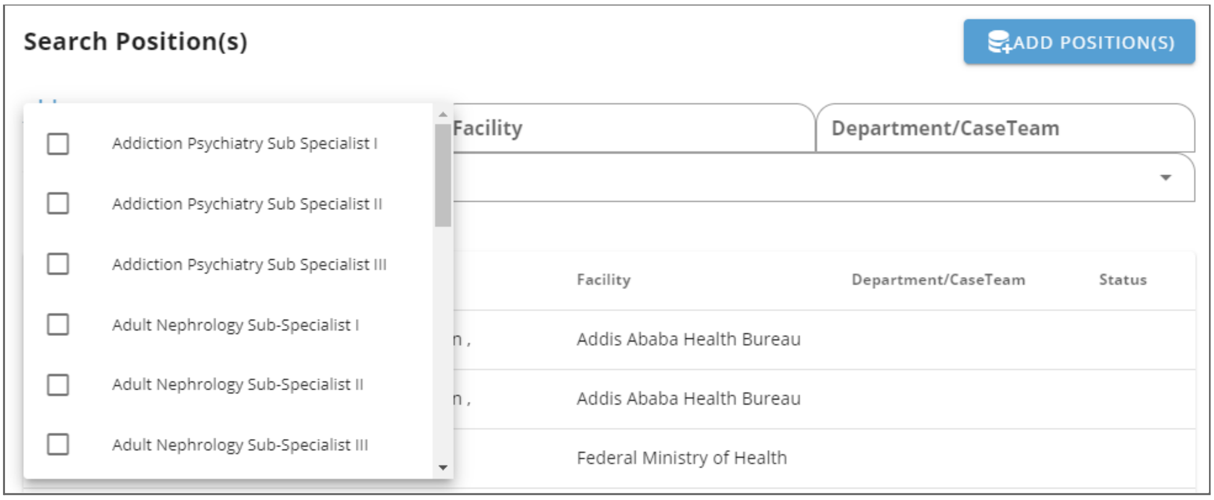


Records matching your search will be pulled from the database.

See the tips for viewing the results in the table.

To search by Job:

i. Scroll through the dropdown list to select the job to search by. The table will update to show all employees in that position and job. You can also select more than one job.



ii. Click on a row to view a position record, which may be associated with a specific employee.

By Facility:

i. Select a facility from the dropdown list. The table will update to show all positions and employees in that facility.

ii. Click on a row to view a position record, which may be associated with a specific employee.

By Department/Case Team:

i. Scroll through the dropdown list to select theDepartment/Case Team to search by. The table will update to show all positions within that Department/Case Team and the associated employees. You can also select more than one directorate.

By Employment Status:

i. Select the employment status to use as a filter. The table will update to show all positions with that status and the associated employees. You can also select more than one employment status.

ii. Click on a row to view a position record, which may be associated with a specific employee.

By Position Status:

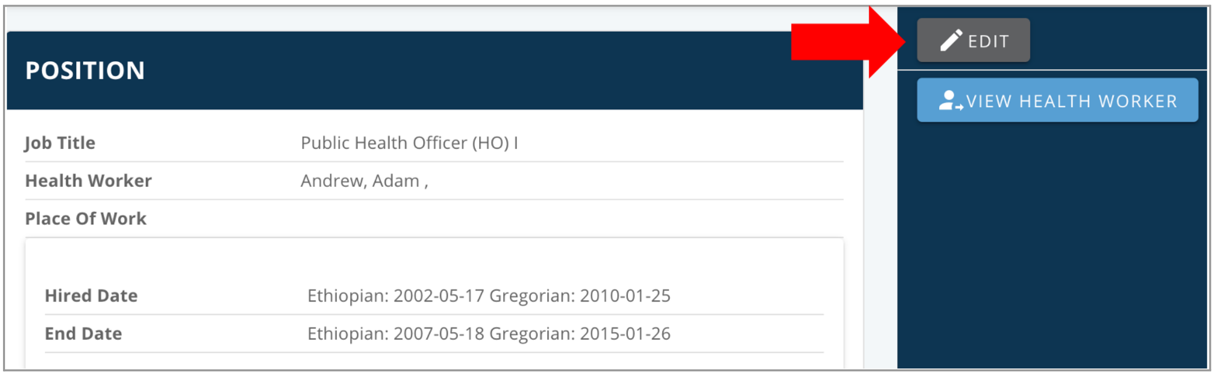
i. Select the employment status to use as a filter. The table will update to show all positions with that status and the associated employees. You can also select more than one position status.

ii. Select the employment status to use as a filter. The table will update to show all positions with that status and the associated employees. Click on a row to view a position record, which may be associated with a specific employee.

Edit Position

This feature allows you to add or update information in an existing position record.

1. From the Search Positions page, locate the position that you wish to modify and click on it to open the record. At the top of the right sidebar click on the "**Edit**" button.



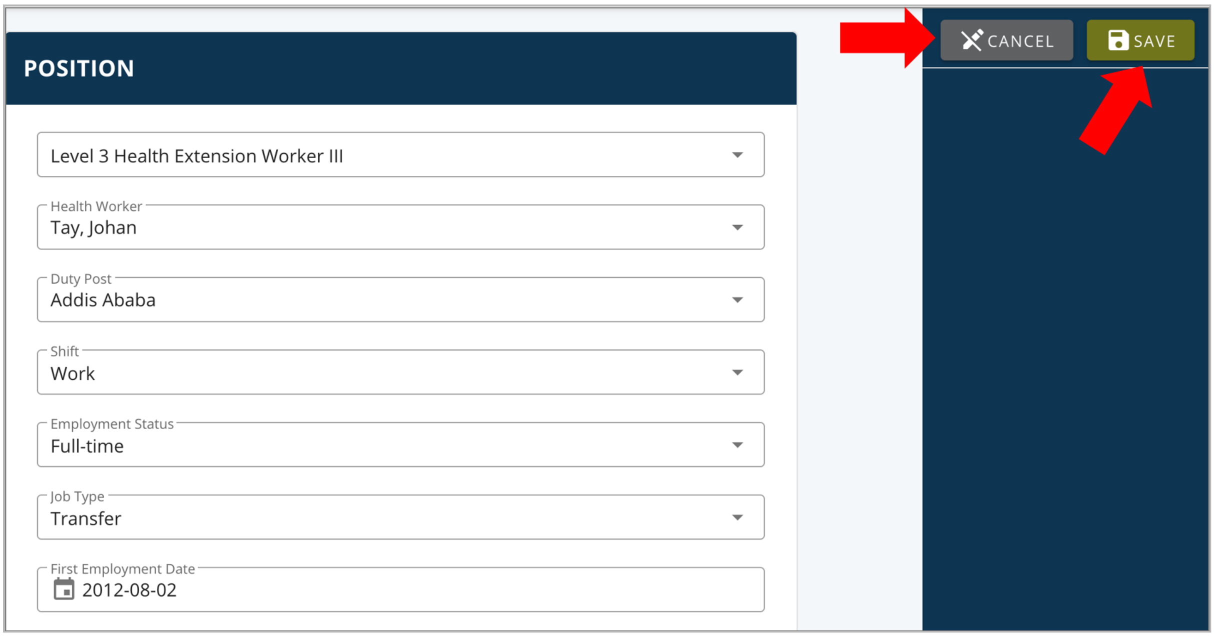
2. You can then add or modify the information in the record by selecting information from dropdown lists, selecting dates from calendars, and/or typing information directly into the record in any section and field. Fields that are required are indicated with a red asterisk. (See instructions for using the calendar selector in the Navigation section)

   Note that the record only contains information related to the position so clicking "Edit" will not display all of the employee's demographic information, contact information, education, etc. If you wish to view the full record of the associated employee, click on the blue "**View Health Worker**" button on the right side navigation bar.

The following information can be edited on the Edit Position page:

- Job title (required, select from dropdown list)
- Health Worker (start typing name to select from dropdown list)
- Facility/Place of work (start typing name to select from dropdown list)
- Department/Case Team (start typing name to select from dropdown list)
- Hired date (required, select from calendar)
- This is the date the employee signs the employment contract
- End date (select from calendar)
- Currency (Salary) (select from dropdown list)
- Salary
- Employment status (select from dropdown list)
- Position Status (required, select from dropdown list)
- Job type (required, select from dropdown list)
- First employment date (select from calendar)
    - This is the employee's first day of work (used to calculate pension)
- Job information remark
- Reason for Change/Departure (select from dropdown list)
- Reason for Change (select from dropdown list)
- Salary scale (select from dropdown list)
- Status (click to select between true or false)

3. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your changes without saving them by clicking the "**Cancel**" button in the top of the right sidebar.


CANCEL
SAVE
POSITION
Level 3 Health Extension Worker III
Health Worker
Tay, Johan
Duty Post
Addis Ababa
Shift
Work
Employment Status
Full-time
Job Type
Transfer
First Employment Date
2012-08-02

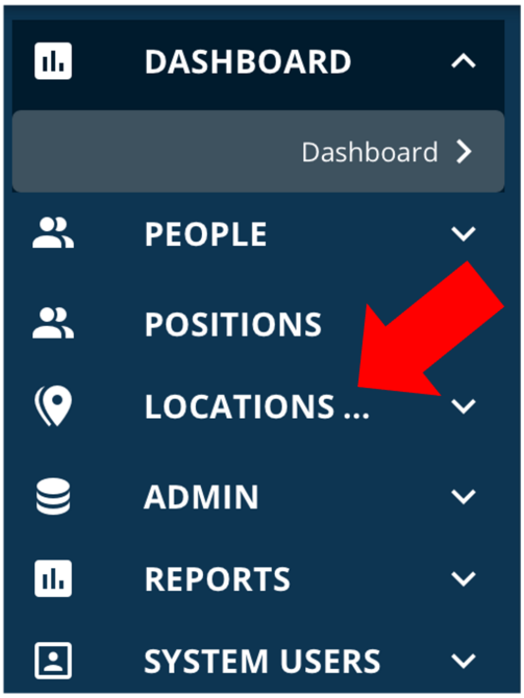
Locations/Facilities

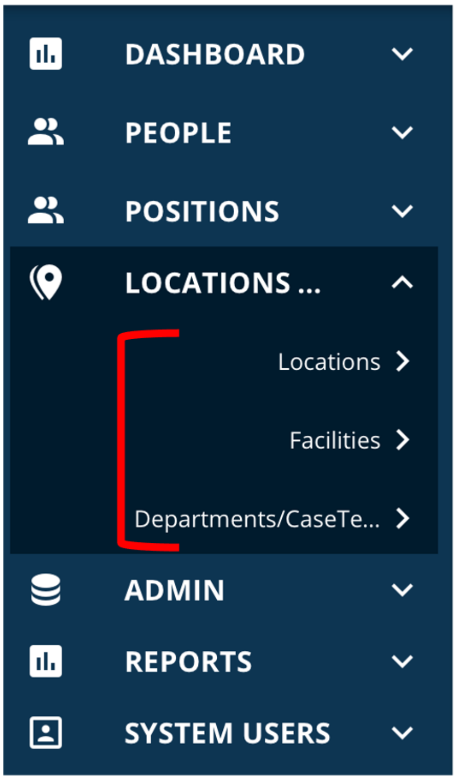
This module enables you to add and manage locations, facilities, and department/case teams in the database. It is the primary place to add new, search, and make changes to existing locations, facilities, and department/case teams.

Add Location, Facility, or Department/Case Team

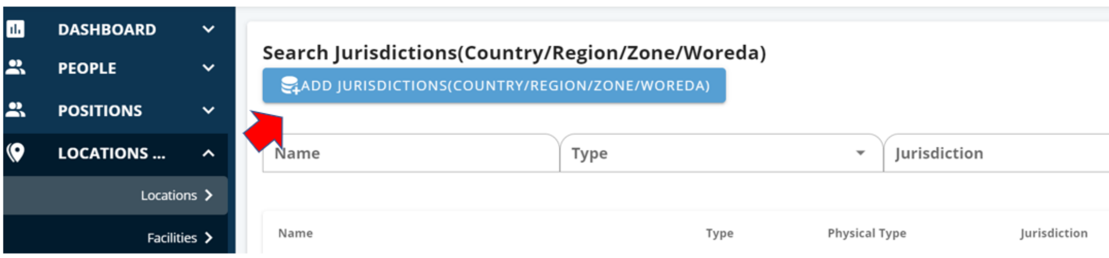
On this page you can create a location, facility, or department/case team by adding information to the fields.

1. To create a new location, facility, or department/case team click on "**Locations...**" on the left side navigation bar and then click on either "**Location"** or **"Facility**" or "**Departments/Case Te...**" on the left side navigation bar.

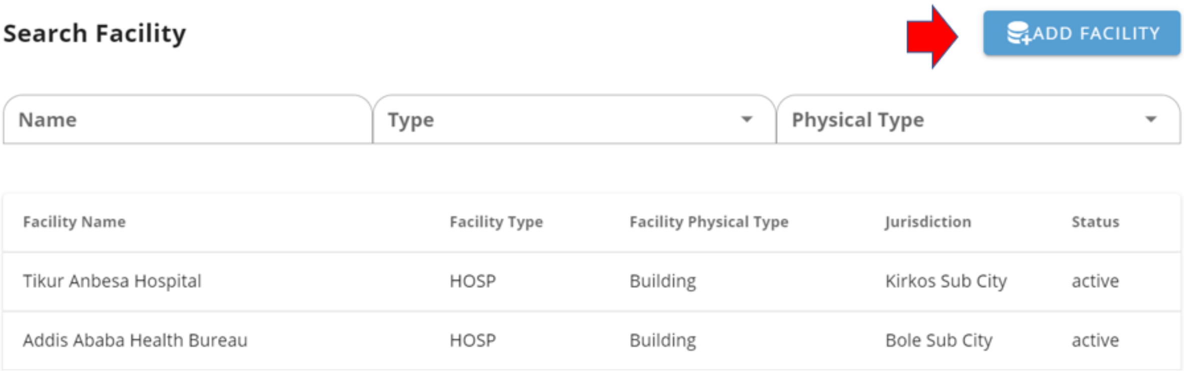




a. To add a location, at the top of the table displaying locations, click on the light blue "**Add Jurisdictions (Country/Region/Zone/Woreda)**" button.



b. To add a facility, at the top of the table displaying facilities, click on the button in the top right corner that says "**Add Facility**".



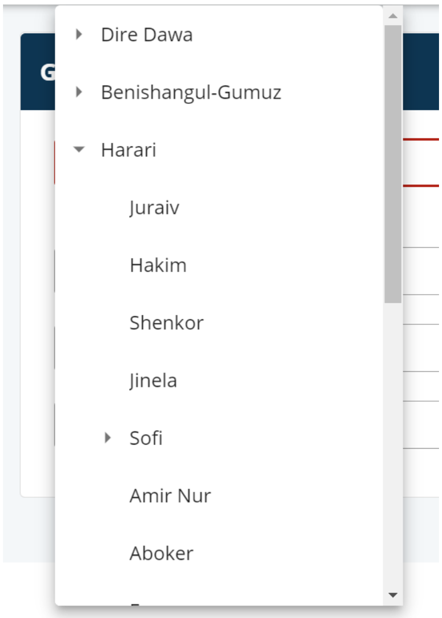
Facility Name	Facility Type	Facility Physical Type	Jurisdiction	Status
Tikur Anbesa Hospital	HOSP	Building	Kirkos Sub City	active
Addis Ababa Health Bureau	HOSP	Building	Bole Sub City	active

c. To add a department or case team, at the top of the table displaying departments and case teams, click on the button in the top right corner that says "**Add Department/CaseTeam**".

2. Enter the information about the new location, facility, or department/case team to its record. Here are a few tips:
    - Fields in the blank form that are required are indicated with a red asterisk.
    - Dropdown lists are available for some fields and are noted in the list below.
    - With dropdown lists you can start typing the word that you wish to enter and you will be taken to it in the list, rather than scrolling through the whole list.
    - For the other fields you will type the information directly into the space provided.

a. The following information can be entered on the Location form:

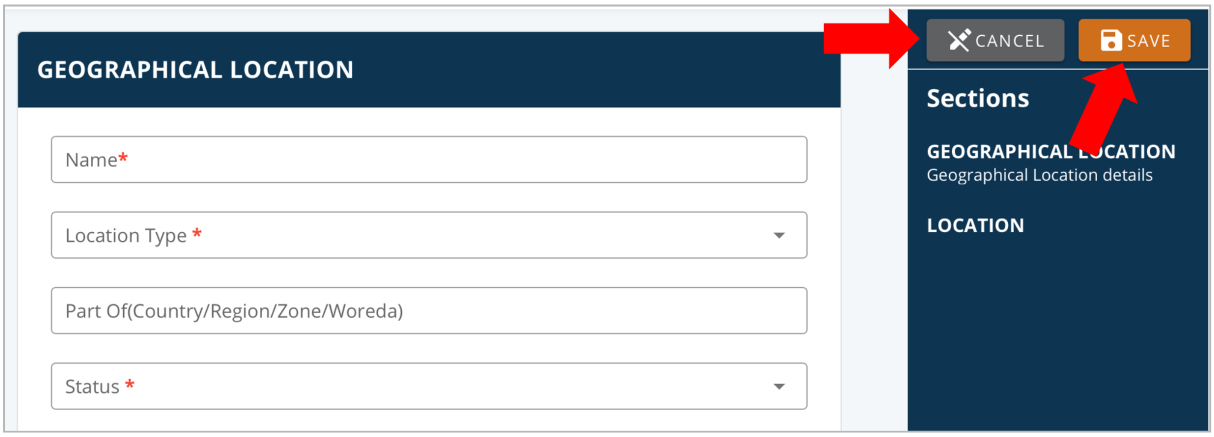
Geographical Location
- Name (required)
- Location Type (required, select from the dropdown list)
- Part of (Country/Region/Zone/Woreda) (required, see image below)
    - Click on the Region to select it, or, click on the arrow beside the Region to see the corresponding Zones, then
    - Click on the Zone to select it, or click on the small grey arrow beside the Zone to see the corresponding Woredas, then
    - Select the Woreda
- Status (select from dropdown list)



b. The following information can be entered on the Facility form:
Facility
- Name (required)
- Facility Service Type (required)
- Part of (Country/Region/Zone/Woreda) (required, see diagram above)
    - Click on the Region to select it, or, click on the arrow beside the Region to see the corresponding Zones, then
    - Click on the Zone to select it, or click on the small grey arrow beside the Zone to see the corresponding Woredas, then
    - Select the Woreda
- Status (required)
- Co-ordinates

c. The following information can be entered on the Department/CaseTeam form:
Department/CaseTeam
- Name (required)
- Organization Type (required)
- Part Of (Department/CaseTeam)
- Status (required)

3. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your entry without saving it by clicking the "**Cancel**" button in the top of the right corner.



Search Location or Facility or Department/Case Team

On these pages you can search for a location, facility or department/case team using keywords and filters.

1. From the left side navigation bar, click "**Location" or "Facility**" or "**Department/CaseTeam**" to search for a location or facility or department/case team.

2. There are several options for searching.
   a. With locations you can search by name, location type, and jurisdiction. With facilities you can search by name, type, and physical type. With departments/case teams, you can search by name, type, or CaseTeam Department.
   b. If searching by name, jurisdiction, or case team department you should type part or all of the location/facility name; you must hit the "**Enter**" or "**Return**" key on your keyboard to start the search. To search by location type, facility type or physical type, or Department/Case Team Type you should scroll through the drop down lists and make a selection.

   You can search by multiple fields or multiple entries within the same field (i.e. by one location type and one jurisdiction, or by two different location types).

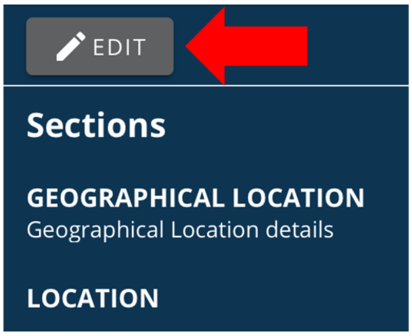
   Records matching your search will be pulled from the database. See the tips for viewing the results in the table.

3. You can then select a search result to view the full record - this is done by clicking anywhere in the row of the record you want to view.

Edit Location or Facility or Department/CaseTeam

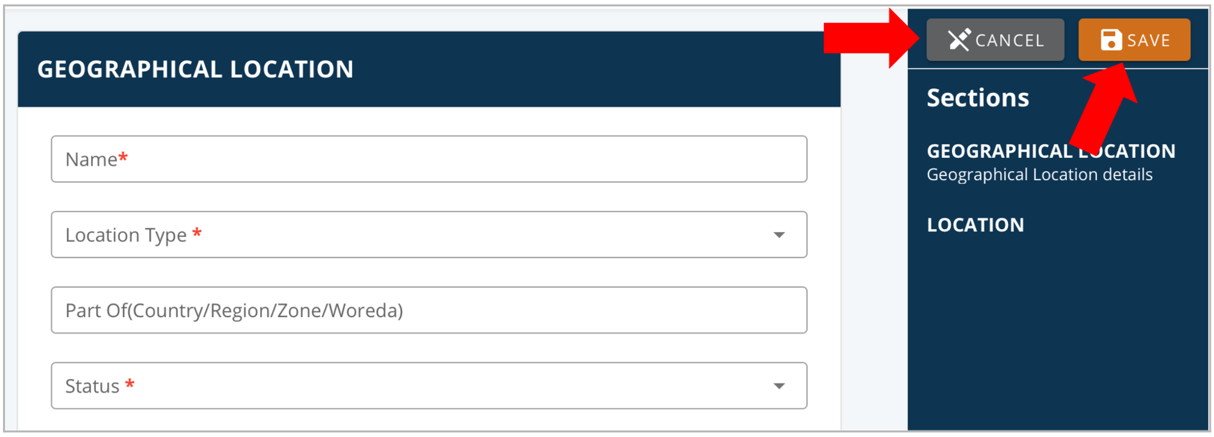
To add or update information in an existing record.

1. From the pages with the Locations, Facilities, and Department/CaseTeam tables find the location or facility or department/case team record that you wish to modify and click on it to open the record. At the top of the right sidebar click on the "**Edit**" button.



2. You can then add or modify the information in the record by selecting information from dropdown lists and/or typing information directly into the record in any section and field. Fields that are required are indicated with a red asterisk.

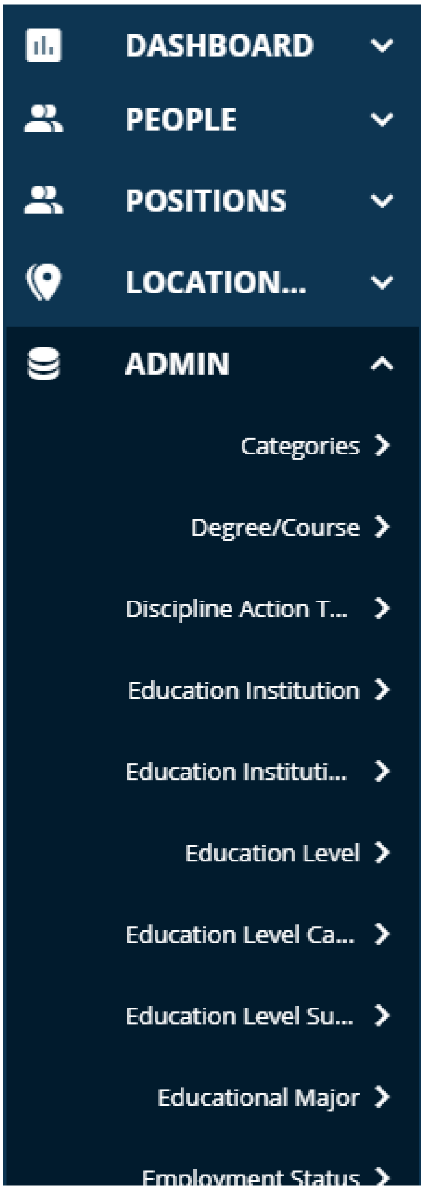
3. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your changes without saving them by clicking the "**Cancel**" button in the top of the right sidebar.



Admin

This module enables you to add or modify the elements contained in dropdown lists in the system.

On the left side navigation bar, when you click on "**Admin**" you will see a long list of all of the fields with dropdown lists throughout the system. To modify the items in the list click on the list title.



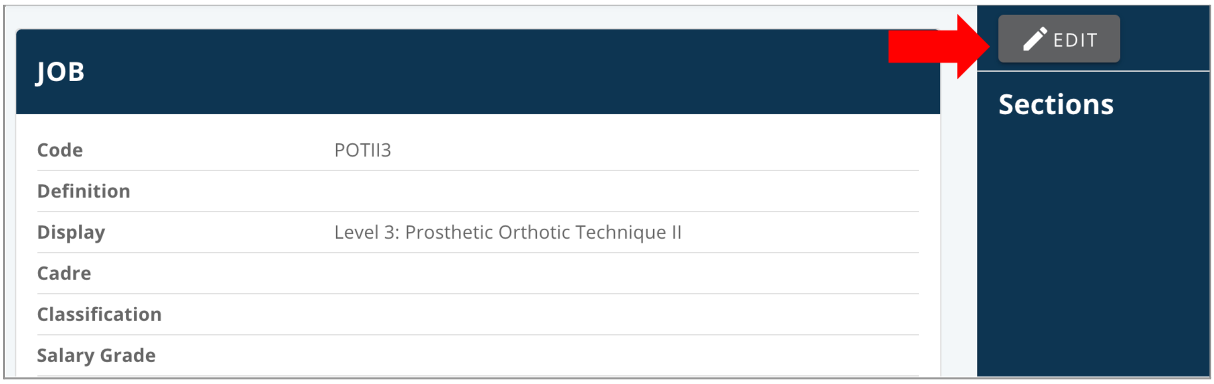
View dropdown list contents

Once you click on a list in the left side menu, the elements included in the dropdown list you selected will be pulled from the database.

See the tips for [viewing the results in the table](#).

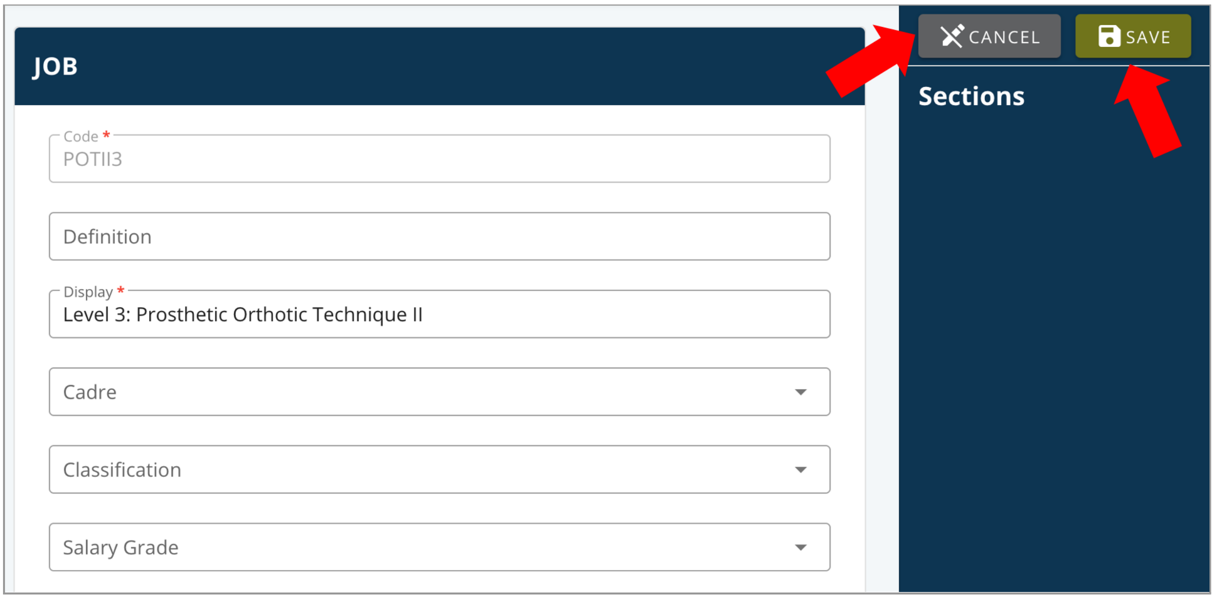
Edit dropdown list elements

1. To edit one of the elements in a dropdown list click anywhere in the row of the element you wish to modify.
2. On the page with the element, click the "**Edit**" button in the top right corner of the record page.



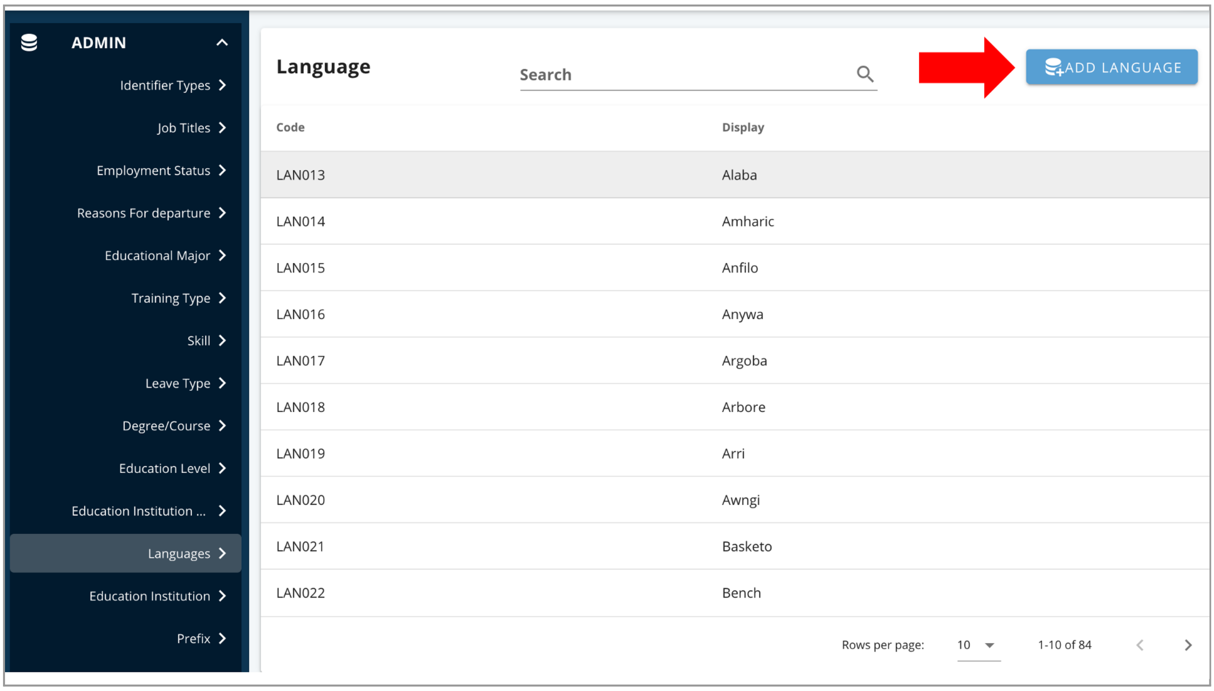
3. Find the field(s) you would like to edit and then type the new information directly into the record. Fields that are required are indicated with a red asterisk.

4. When you are done making changes, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your changes without saving them by clicking the "**Cancel**" button in the top of the right sidebar.



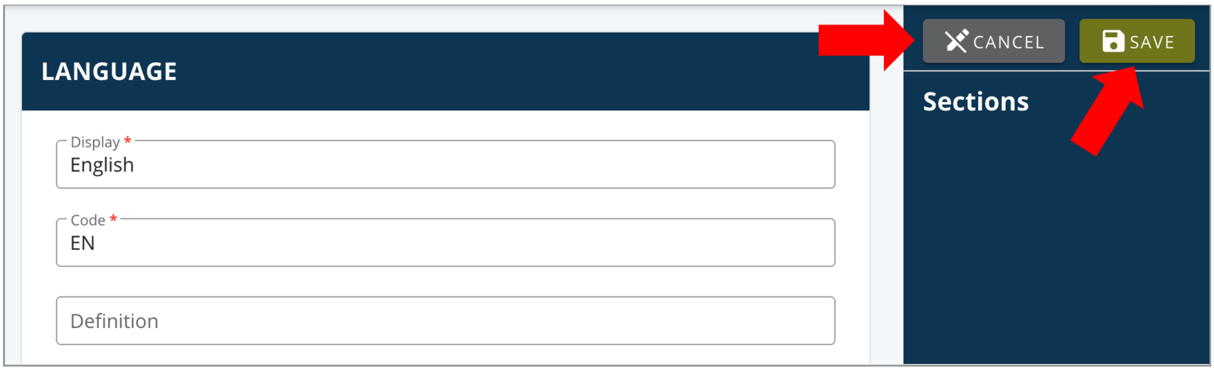
Add dropdown list elements

1. After locating and clicking on the list that you would like to add to (from the left side navigation panel), in the top right corner of the table showing existing list elements click on the button that says "**Add [list title]**".



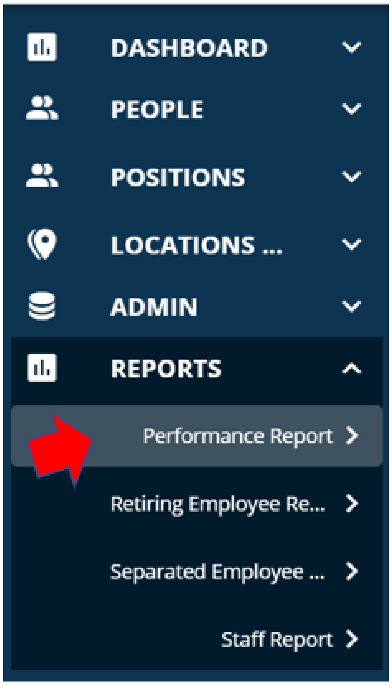
2. You will then see the different fields associated with the element where you can enter information about the new list element. Fields that are required are marked with a red asterisk.

3. After you have filled in all required fields and any others you would like to define, click the "**Save**" button at the top of the right sidebar. If you have not entered all of the required fields indicated with a red asterisk, you will not be able to save the record. Review the form by scrolling to determine which required fields still need to be completed. You can leave your changes without saving them by clicking the "**Cancel**" button in the top of the right sidebar.



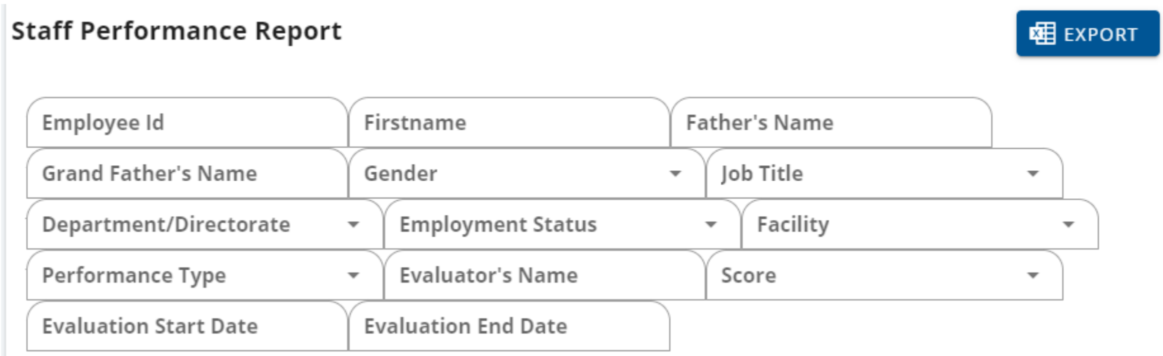
Reports

This module allows you to access custom reports.



Performance Report

The performance report allows you to search performance information about staff, using different filters. The performance report creates a report showing Employee ID, First Name, Father's Name, Grandfather's Name, Gender, Job Title, Department/Directorate, Employment Status, Facility, Performance Type, Evaluator's Name, Score, Evaluation Start Date, Evaluation End Date



1. By selecting different filter options for the drop downs menus, records that match your search will be pulled from the database and displayed. You can tailor your search using the following search filters:
    - Employee ID

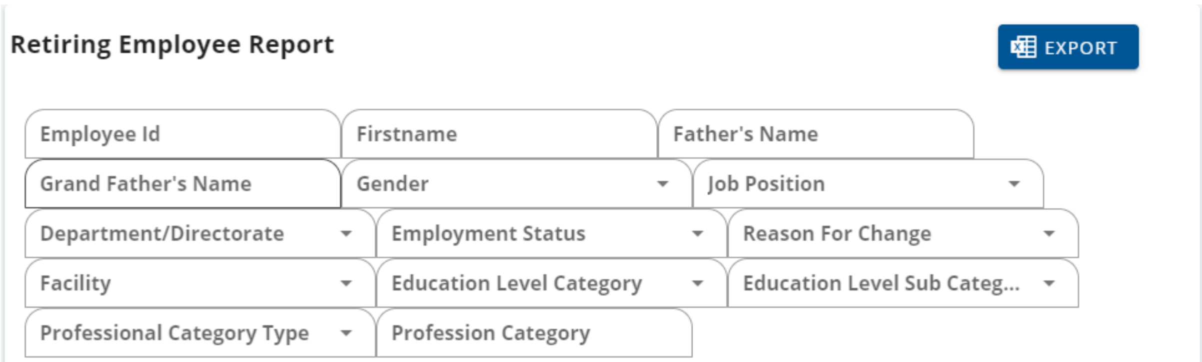
- First Name
- Father's Name
- Grandfather's Name
- Gender (select from dropdown list)
- Job Title (select from dropdown list)
- Department/Directorate (select from dropdown list)
- Employment Status (select from dropdown list)
- Facility (select from dropdown list)
- Performance Type (select from dropdown list)
- Evaluator's Name
- Score (select from dropdown list)
- Evaluation Start Date (select from calendar)
- Evaluation End Date (select from calendar)

2. When filtering from a dropdown list, you can select more than one option by clicking the box next to that option, and you can select to include or exclude multiple options.

3. Once you have selected the filter options, you can Export the results into an Excel spreadsheet by clicking the blue "**Export**" button.

Retiring Employee Report

The retiring employee report allows you to search retirement information about staff, using different filters. The retiring employee report creates a report showing Employee ID, First Name, Father's Name, Grandfather's Name, Gender, Job Position, Department/Directorate, Employment Status, Reason for Change, Facility, Education Level Category, Education Level Sub Category, Professional Category Type, Profession Category



1. By selecting different filter options for the drop downs menus, records that match your search will be pulled from the database and displayed. You can tailor your search using the following search filters:
   - Employee ID
   - First Name
   - Father's Name
   - Grandfather's Name
   - Gender (select from dropdown list)
   - Job Position (select from dropdown list)
   - Department/Directorate (select from dropdown list)
   - Employment Status (select from dropdown list)
   - Reason for Change (select from dropdown list)
   - Facility (select from dropdown list)
   - Education Level Category (select from dropdown list)

- Education Level Sub Category (select from dropdown list)
- Professional Category Type (select from dropdown list)
- Profession Category (select from dropdown list)

2. When filtering from a dropdown list, you can select more than one option by clicking the box next to that option, and you can select to include or exclude multiple options.

3. Once you have selected the filter options, you can Export the results into an Excel spreadsheet by clicking the blue “**Export**” button.

Separated Employee Report

The separated employee report allows you to search performance information about staff, using different filters. The separated employee report creates a report showing Employee ID, First Name, Father’s Name, Grandfather’s Name, Gender, Job Position, Department/Directorate, Employment Status, Reason for Change, Facility

1. By selecting different filter options for the drop downs menus, records that match your search will be pulled from the database and displayed. You can tailor your search using the following search filters:
   - Employee ID
   - First Name
   - Father’s Name
   - Grandfather’s Name
   - Gender (select from dropdown list)
   - Job Position (select from dropdown list)
   - Department/Directorate (select from dropdown list)
   - Employment Status (select from dropdown list)
   - Reason for Change (select from dropdown list)
   - Facility (select from dropdown list)

2. When filtering from a dropdown list, you can select more than one option by clicking the box next to that option, and you can select to include or exclude multiple options.

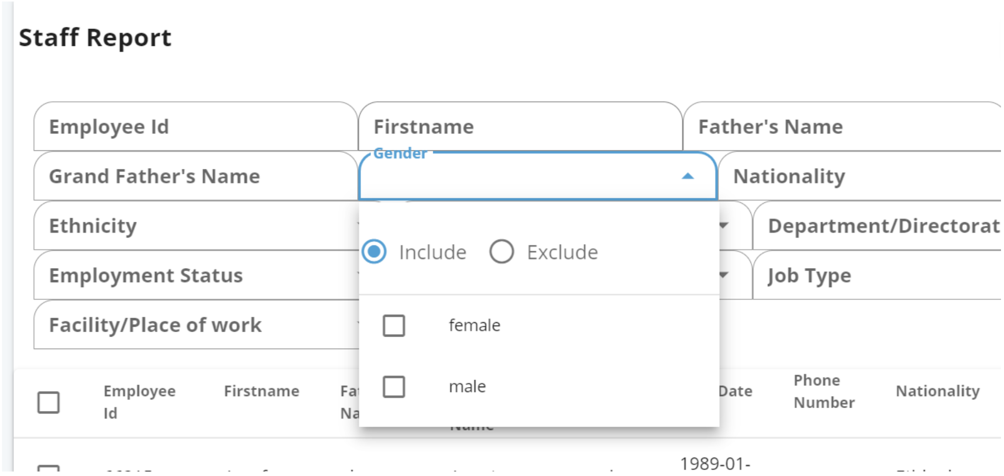
3. Once you have selected the filter options, you can Export the results into an Excel spreadsheet by clicking the blue “**Export**” button.

Staff Report

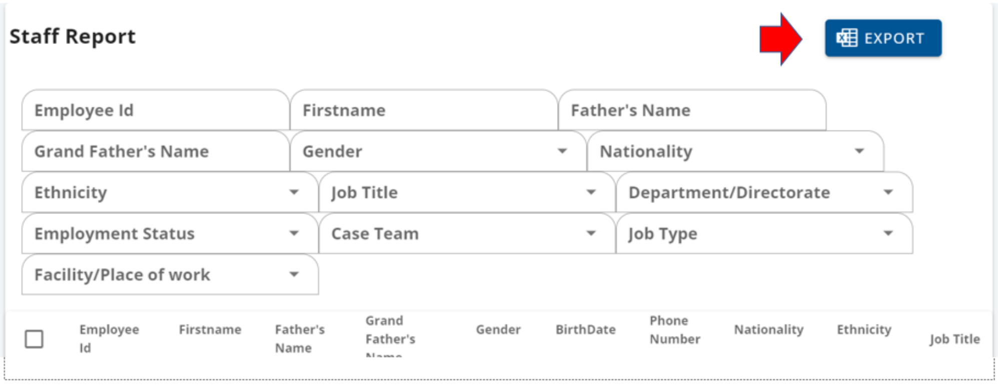
The staff report allows you to search information about staff, using different filters. The staff report creates a report showing Employee ID, First Name, Father’s Name, Grandfather’s Name, Gender, Birth Date, Phone Number, Nationality, Ethnicity, Job Title, Department/Directorate, First Employment Date, Start Date, End Date, Employment Status, Case Team, Job Type, Facility/Place of Work

1. By selecting different filter options for the drop downs menus, records that match your search will be pulled from the database and displayed. You can tailor your search using the following search filters:
    - Employee ID (start typing for selection from dropdown list)
    - First Name (start typing for selection from dropdown list)
    - Father’s Name (start typing for selection from dropdown list)
    - Grand Father’s Name (start typing for selection from dropdown list)
    - Gender (select from dropdown list)
    - Nationality (select from dropdown list)
    - Ethnicity (select from dropdown list)
    - Job Title (select from dropdown list)
    - Directorate/Department (select from dropdown list)
    - Employment Status (select from dropdown list)
    - Case Team (select from dropdown list)
    - Job Type (select from dropdown list)
    - Facility/Place of Work (select from dropdown list)

2. When filtering from a dropdown list, you can select more than one option by clicking the box next to that option, and you can select to include or exclude multiple options.

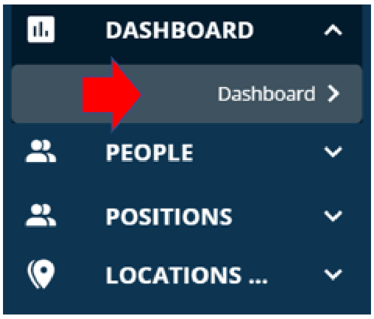


3. Once you have selected the filter options, you can Export the results into an Excel spreadsheet by clicking the blue “**Export**” button.



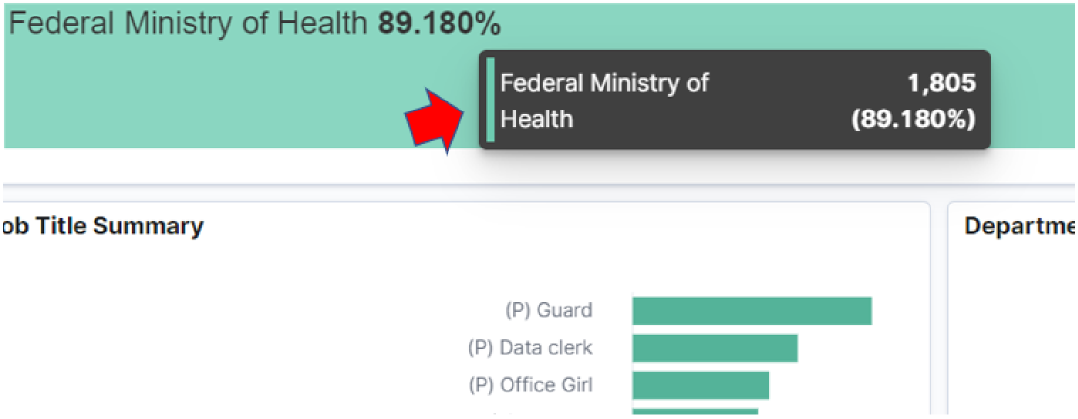
Dashboard

This module allows you to view custom dashboards

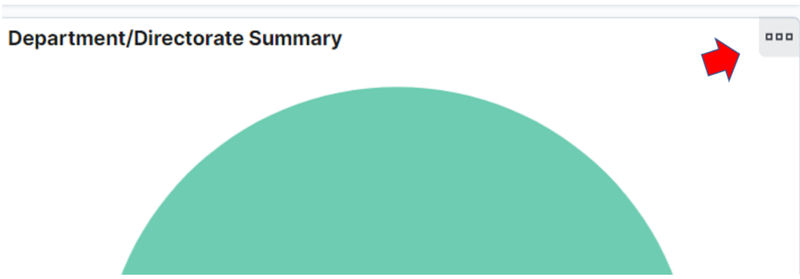


Navigation Tips

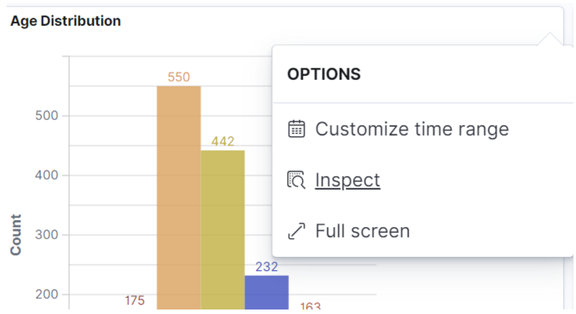
1. Holding the cursor over the dashboard will display the data in a pop up window.



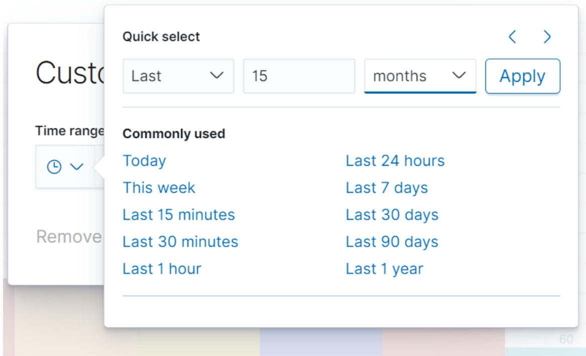
2. Hover the cursor over the top left corner of a dashboard and three dots appear.



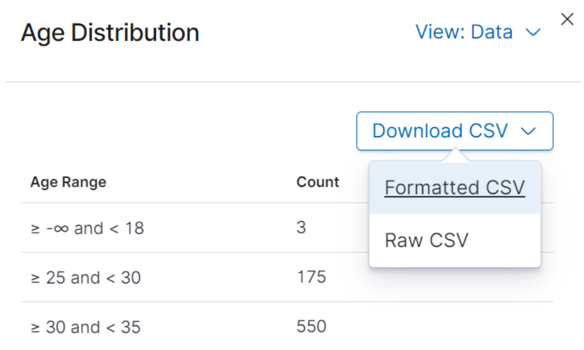
3. Click the dots to get options to customize the reports
   - Customize time range
   - Inspect
   - Full screen



a. Click “Customize time range” to bring up a pop up box that allows you to select a custom time range for the dashboard

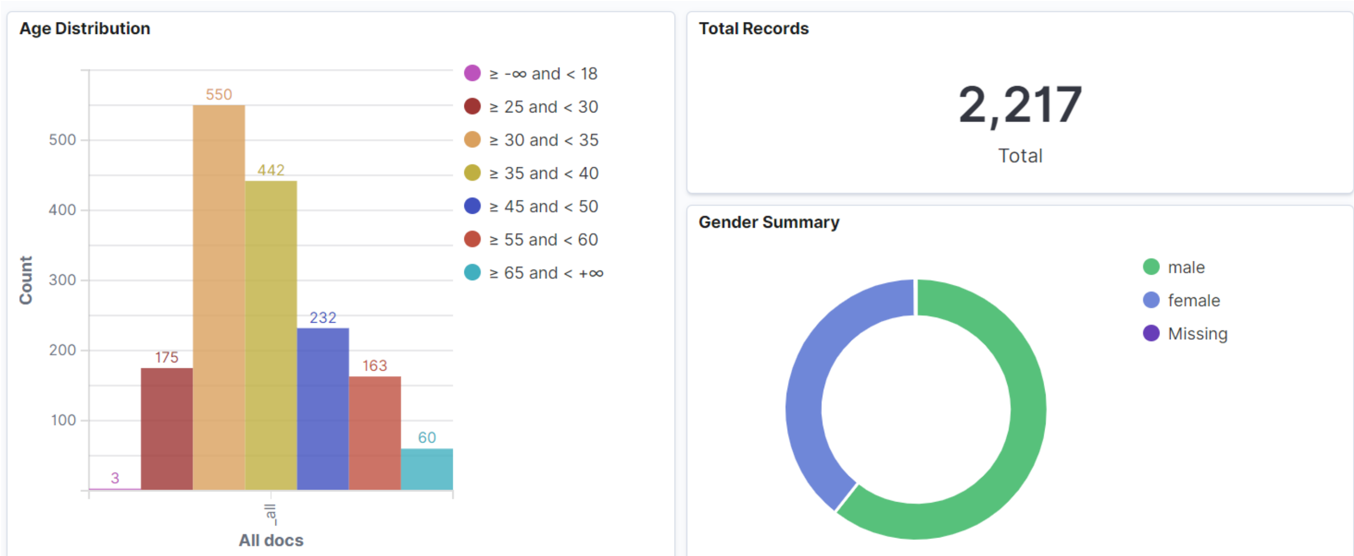


b. Click “**Inspect”** to view the data and get the option to download the data into CSV format



c. Click “**Full screen**” to view that dashboard in the larger sized full screen. Hover the cursor over the top left corner and click the three dots again and select “**Minimize**” to revert the dashboard to its original size.

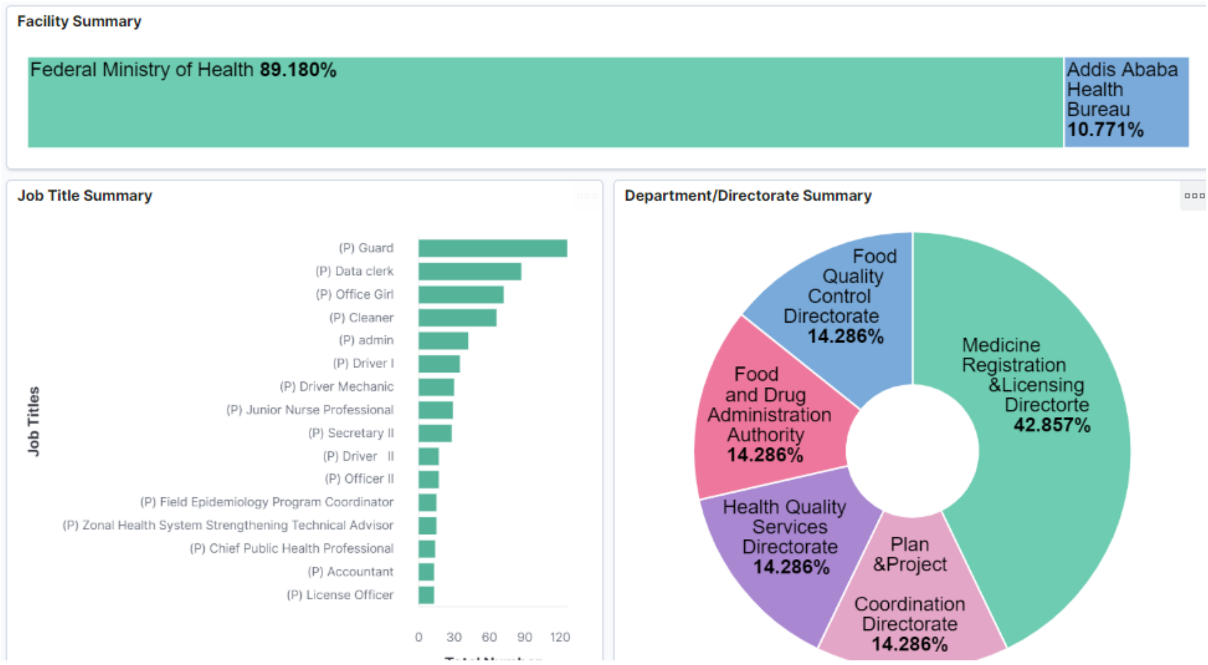
Dashboards



<u>Age Distribution</u>
The Age Distribution dashboard displays the distribution of age across the workforce

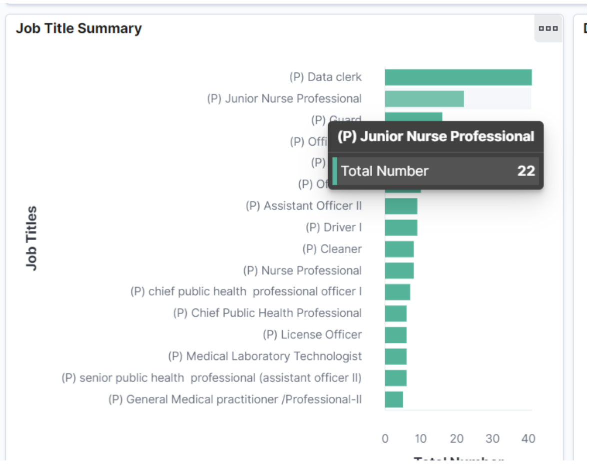
<u>Total Records</u>
The Total Records dashboard displays the total number of records in the HRIS system

<u>Gender Summary</u>
The Gender Summary dashboard displays the gender distribution of the workforce. It also displays the number of records that are missing that data.



Facility Summary
The Facility Summary dashboard displays the distribution of facilities across the workforce

Job Title Summary
The Job Title Summary dashboard displays the list of Job Titles in the system and how many records have that job title. Navigation Tip: hover the cursor over the bar beside a job title to see the number of records associated with that title.



Department/Directorate Summary
The Department/Directorate Summary dashboard displays the distribution of facilities across the workforce