eAdventist Personnel

User Guide

eAdventist Personnel is a web application that enables Adventist employers to record employee service. That means there are no CDs to distribute and install or transfer disks to mail. You can use it from multiple computers. There is no need to send completed data at the end of each year, retirement personnel can access it. When you call for support, the person assisting you can view exactly the same information that you are. If an employee has worked for another employer you can view the service entered for each of the other employers.

I. Getting Started

To obtain an eAdventist Personnel account contact the NAD or Canadian Retirement Office, depending on which territory your office is in. They will have you fill out a User Authorization form, copy attached to this document.

Once the retirement office has received your authorization form and set up your account:
1. Connect to the Internet and open your browser (Internet Explorer, Firefox, Safari, Chrome, etc…).
2. Browse to http://www.eadventist.net.
3. Click the "Personnel login" link in the upper right corner of the screen.
4. Enter your email address and password and click the "Login" button. Remember that passwords are case sensitive. Note that a padlock in the bottom right of your browser indicates that all information flowing between your computer and the server is encrypted. If you are unable to login, see "Getting Support" below.
5. You are ready to view/edit employees and their service.

II. Employees

Viewing and Searching Employees
1. Click on the "Employees" tab to view a list of your current employees.
2. Once on the "Employees" page you may enter all or part of a name and click "Search" to narrow down the list. If you have access to multiple employers you may also change which employer you are currently viewing by selecting it from the drop down list and clicking the "Search" button.
3. Click on an employee's name to view their full information
4. The top of the Employee page contains the core information. The bottom portion of the screen on the Employee page is divided into several tabs. These are:
   - **"Contact info"** – basic address and phone information
   - **"Employment"** – dates and info pertaining to general employment
   - **"Credential"** – current credential along with any degrees obtained
   - **"Canada"** – fields specific to the SDA Church in Canada
   - **"Spouse"** – current and previous spouses
   - **"Beneficiary"** – lists the employee's beneficiaries
   - **"Notes"** – general notes
   - **"Actions"** – actions taken

Updating Employees
1. Click on "Employees" tab and then on the desired employee's name.
2. Update the employee's information including any information on the tabs at the bottom of the screen, and click the "Save" button. Note that since this is an internet application nothing is saved until you click the "Save" button.
3. Click "New Degree" on the "Credential" tab, "New Spouse" on the "Spouse" tab, or "New Beneficiary" on the "Beneficiary" tab to add each respective piece of information. Once you've added this information click on the "Edit" or "Delete" links next to each Degree, Spouse, or *Beneficiary to make changes. *Please note that the Beneficiary tab has now been blocked for the exclusive use of Canadian employers only.

Adding Employees
1. Click on the "Employees" tab and then on the "New Employee" button. You are required to note why you are seeking to pull up or create a file on a new employee:
   a. I have hired or am hiring this employee
   b. I need to correct prior service for this employee
   c. I need to process a retirement application for this employee
   There should be no other reason to go to this screen.
2. Fill in the SSN/SIN and Birth date for the employee and click "Ok".
   • If a matching employee is found in eAdventist Personnel they will be added to your list of current employees and you will be taken to their Employee page.
   • If the employee is not found you will be taken to the "New Employee" page where you will be asked to fill in the employee's name and gender. Enter this information and click "Ok" to create the employee and add them to your list of current employees. Be careful not to create a duplicate employee file if you know the individual has previous denominational service. Instead, ask the support team to check it out to see if there is already a file in the eAdventist Personnel database.

Transferring Employees
It is not necessary to transfer employees in eAdventist Personnel. When another employer needs an employee they will collect the SSN/SIN and birth date from the employee and add them to their list of employees.

Deleting Employees
1. Click on the "Employees" tab to view the list of your current employees.
2. Click the "Delete" link in the right-hand column next to the name of the employee you wish to delete, but only if no changes or service record entries have been made in the current year. Deleting an employee will take them off your list of current employees but will NOT delete them or their service from Personnel entirely. Employees without service on 12/31 of the current year are automatically removed from your list when the year is closed.

III. Service

Viewing Service
1. Click on the "Employees" tab, then on the desired employee's name and finally on the "Service" button on the Employee page.
2. The top of the page shows total service credits for each retirement plan as well as indicators showing whether an employee is vested in each plan.
3. Listed below is the service summary for the employee. Also notice the Errors column and "Warning" links, if any, for the employee. Click these links to view any Warning messages associated with a particular service record.
4. Click the "View" link next to a service record to view its full details.

Correcting Service, Past and Current

Each employer can make changes to any service, past or current, an employee has accrued with that employing organization. To do so:

1. From the Employee Service screen (see Viewing Service above) click the "View" button next to a particular service record to see a detailed view.
2. Make the desired service changes and click the "Save" button. Notice the screen automatically disables (grey) and enables (white) fields based on the rules for that service record.
3. To have past service corrected that an employee accrued with another employer contact that employing organization.

Adding Service

1. Search for the employee you wish to update, click on their name then on the "Service" button.
2. Click the "New Service Record" button. This will bring up a new service record for the current year with the previous service record's values automatically filled in by default. Make the necessary adjustments and click "Save" to add the new Service Record.

IV. Reports

Service Record

To print a Service Record for an employee, click on the "Print Service Record" button on their Employee page. The Service Record report shows all service and totals for an individual employee along with summary personal information.

Employee Profile

To print an Employee Profile for an employee, click on the "Print Profile" button on their Employee page. The Employee Profile shows all personal information for an employee along with summary service information.

Print Envelope

On the employee screen click on Print Envelope to prepare an envelope with this employee's address. Assumes you are keeping the address up to date.

Service Record Year End Log

The Service Record Year End Log is a summary of all service records entered so far for the current year or for any previous year. To view this report click on the "Reports" tab and then on the "Service Records Year End Log" link. Select the desired Employer, Year and Report format and then click the "View Report" button.

This report serves two purposes.

1. For the current year the report header will be, "Service Records entered as of xx/xx/xxxx". This means that you are viewing a year that has not yet been closed. This report is a printout that can be used to verify data before closing the year.
2. For a closed year the report header will be, "Service Record Year End Log for xxxx". This means you are viewing the final report for a closed year.

Other Reports

From the "Reports" tab you can print the following additional reports:

- Service records for all of your employees
- Employee profiles for all of your employees
- Employee address labels for all of your employees
- Credentials download for use with a credential printing service

V. Benefits Calculator

The Benefits Calculator is an Excel spreadsheet used to estimate retirement benefits for an employee. It will assist in producing the Application Forms, Benefits Calculator and Estimate Statement for an employee. Microsoft Excel 2003 or later versions are required when working with the Benefits Calculator.

Downloading Benefits Calculator
1. Go to the "Reports" tab and click on the "Benefits Calculator xx.xx" link. The x's represent the current version number of the Benefits Calculator. Pay special attention to this number in the future to make sure you are using the latest copy of the Benefits Calculator.
2. When the box pops up, Save the BenefitsCalculator.xls file to your local computer.

Downloading Benefits Data
1. Click on the "Employees" tab and then on the employee you wish to calculate the benefits for.
2. Make sure personal data is correct, including address, spouse information, contact information, etc..
3. Click the "Export Benefits Data" link.
4. When the "Save" box pops up, save the benefitscalc.xml file to your local computer, renaming it to indicate the employee.

Loading Benefits Data
1. Open the BenefitsCalculator.xls Excel file you saved in the "Download Benefits Calculator" process above.
2. Click on the "Data" menu in Excel 2003.
3. Click on "XML"
4. Click on "Import…" **For Excel 2007 or later-If Excel has been set to import XML files, right click in cell C4 of the Import tab, scroll to XML and select 'Import'.
5. Select the XML file that you saved in the "Export Benefits Data" process above.
6. Click the "Import" button.
7. Check for accurate import – Description in Column A should match data in Column C.
8. Blank fields on the "Import" sheet should be entered manually after the import is complete.
9. When the Benefits Calculator spreadsheet has been completed, and signed forms have been received from the applicant:
   a. Upload the finalized Benefits Calculator with the retiree's name in the title, using the "Upload Application" button on the Employee page. This will send an encrypted secure copy to the Retirement Office for processing.
   b. Also, mail the signed application with the necessary documentation to the Retirement Office.

A more complete users' manual for the Benefits Calculator can be downloaded from the "Reports" tab

VI. Employers

All employers are listed in eAdventist Personnel on the "Employers" tab. The "Employers" page separates employers onto two tabs, "Active" and "Inactive." Next to each employer's name is a count of the users for that employer, the current year, and the current service records entered for both the current year and for all years.

Click on an employer's name to view more detailed information such as address, phone number and a list of the users for that employer.

VII. Year End Process

At the end of each year you will need to verify that the service records for all employees have been entered and close the year. The Year End Log report on the "Reports" tab can be used to verify that all information has been

entered properly. To close your year:
1. Click on the "Employees" tab and then on the "Close Current Year" button to bring up the "Close Year" screen.
2. The "Close Year" screen shows the current employer, current year and number of service records for the current year. When you are ready to close your year click on the "Close Year" button. If you ever need to back up a closed year contact the eAdventist team.

VIII. Changing Password

To change your password and/or email address used for your account, go to the "Home" page and click on the "Change email/password" link. You must enter your current password in order to either change your email address or change your password.

Passwords are case-sensitive. Password requirements:
1. From 6-20 characters long
2. Must contain only alphanumeric characters (i.e. no punctuation)
3. Must contain at least one letter and at least one number

For security, mix case and avoid using personal names, dates or dictionary words. For example, TLimS23 (remember as "The Lord is my Shepherd, Psalm 23"). Do not give your password to anyone else, it is your signature. If you write it down, guard the written copy as you would the PIN for your bank card.

IX. Account Locked

A user account is automatically locked when three login attempts are made with incorrect passwords within a half hour. This is to prevent unauthorized users from guessing or cracking passwords. If your account is locked, contact either the NAD or Canadian Retirement Office, whichever is applicable.

X. Browser requirements

eAdventist Personnel is compatible with Internet Explorer (for Windows) version 5.0 or higher, Firefox, Mozilla, Safari and Netscape 6 (or higher) with 128-bit encryption. The 128-bit encryption protects data flowing between your computer and the server. To verify the version and encryption level (cipher strength) of Internet Explorer select "About" from the "Help" menu at the top of the browser. Cookies must be enabled as well. eAdventist reports are in Adobe PDF format so Adobe Reader, Acrobat or another PDF reader must be installed in order to view reports.

XI. Getting Support

For technical support contact the eAdventist team at help@eAdventist.net.

eAdventist
Personnel

USER ACCOUNT AUTHORIZATION
Use one form for each authorized User

Please create an eAdventist Personnel user account for this user:

Name:	**Title:**
Email Address:	**Organization:**
Phone #:	**Fax #:**
Office Mailing Address:	

I agree that access to the service record data base is a trusted privilege.
- I will not disclose my password to anyone. If I become aware that my password is being used by anyone else for any reason, I will change my password and notify eAdventist Personnel or my HR Administrator.
- I will not give out information from the service record database to unauthorized persons.
- I understand that if I disclose my password to anyone or give out unauthorized data, my right to use eAdventist Personnel may be discontinued.
- Upon termination, retirement or transfer, I agree to NOT pass on my access password to my replacement but to facilitate the closure of my account and opening of a new account for my replacement.

_____   _____
User signature   *Date*

I am the designated Human Resources Administrator of the eAdventist Personnel data base, with authority to authorize opening and closing of access accounts for this organization. *(An officer or an institutional Human Resources Director.)*
- I hereby authorize the person named above to have eAdventist Personnel User access to the service records of the following entities under my jurisdiction:

1	
2.	
3.	
4.	

- I understand that it is my responsibility to immediately notify eAdventist Personnel when this user is no longer authorized to access eAdventist Personnel.
- I understand that my access to this account is contingent upon my position and that I will inform eAdventist Personnel upon a change in my position.

Name:	**Title:**
Signature:	**Organization:**
E-mail address:	

Please mail or fax this form to eAdventist Personnel at:

Fax: (301) 680-6190
Adventist Retirement Plans
12501 Old Columbia Pike
Silver Spring, MD 20904

Questions? help@eadventist.net