



## SUGGESTED STEPS FOR CUSTOMIZATION

While there is no one “right” way to set up your HR Suite, the key steps contained in this document have worked well for many clients.

HR Suite can be accessed at <http://hrsuite.hrnonline.com>

### Contents

|  |   |
|--|---|
| Customizing Precautions and Guidance .....                                 | 2 |
| HR Policy Manual vs. Employee Handbook.....                                | 2 |
| Suggested Steps for Customization.....                                     | 3 |
| STEP 1 - Get Trained .....   | 3 |
| STEP 2 – Remove Unnecessary Policies from your Working Manual .....        | 3 |
| STEP 3 – Print Your Key Fields Guide and State Law Customizing Guide ..... | 4 |
| STEP 4 – Review the Key Fields Guide and Complete Key Fields.....          | 5 |
| STEP 5 – Customize Content and Insert New Policies and Text.....           | 6 |
| Terminology.....   | 6 |
| Adding Unique Policies to the Working Manual.....                          | 6 |
| Pasting Text from Microsoft Word .....                                     | 7 |
| STEP 6 – Review the State Law Customizing Guide.....                       | 8 |
| STEP 7 – Customize Your Employee Handbook.....                             | 8 |
| STEP 8 – Publish.....  | 8 |
| STEP 9 – Post on the Home Page.....  | 8 |
| STEP 10 – Get Familiar With HR Suite.....                                  | 8 |

For technical support, please contact [hrsupport@cusolutionsgroup.com](mailto:hrsupport@cusolutionsgroup.com).

# Customizing Precautions and Guidance

## Public Employers & Unionized Workplaces

The HR Suite was written for use by private employers. In many instances, relevant employment laws are very different in the public sector. Additionally, companies with unionized environments may have considerably different obligations than those addressed in the HR Suite. Employers in public and union environments should consult their attorneys for assistance in using this product.

## Compliance with Federal, State & Local Law

Although HRN has conducted a great deal of research developing this product, the HR Suite is not designed to be an exhaustive, legally compliant document specific to your company or intended to comply with state and local laws. In other words, we do not assume the role of your legal counsel and, as always, responsibility for compliance with applicable employment laws remains with you.

Once you have customized your HR Suite Policy Manual and Employee Handbook, there may be areas that should be reviewed by you and your attorney to ensure conformity with your organizational needs, state, and local legal requirements as applicable.

## Importance of Customization

HR Suite contains generic policies and forms which should be applicable or easily customized to most companies. However, we strongly urge you to modify the materials and/or eliminate (or archive) those that you do not and will not use.

# HR Policy Manual vs. Employee Handbook

One of the most common questions we are asked as human resource experts is the difference between an Employee Handbook and an HR Policy Manual.

The answer is -HUGE! Below we have listed some clarifications of the purposes of these two very important HR documents.

## HR Policy Manual

- Limited distribution - Intended for the HR department and Managers/Supervisors only.
- Many policies are inapplicable to employees (e.g., I-9, Child Labor, Obtaining References, etc.)
- Guides management and structures managerial actions.
- Promotes consistency throughout the organization.
- Serves as a training tool for Managers.

## Employee Handbook

- Informs employees of important policies, rules, procedures, benefits, and rights.
- Reinforces company goals, objectives, and work standards.
- Attempts to protect company from lawsuits by including employment-at-will language and addressing harassment issues and other forms of discrimination.
- Promotes consistent treatment of employees.
- Serves as a summarized guide for employees. The Employee Handbook is not intended to provide specific policy details or procedural steps; rather it's a basic overview.

## Suggested Steps for Customization

### STEP 1 - Get Trained

HR Suite is fairly intuitive and easy to use; however, as with any software system, simple training can go a long way to help you learn the easiest and most efficient ways to use the system. We recommend reading the “Quick Start Guide” to get familiar with the basic terminology and navigation of the Manual Builder area, and getting training on the system.

Training is offered as both a series of online videos and as a written document (The User’s Guide). The New User Training videos take about 90 minutes from start to finish. To access the video training, login to HR Suite and click on the link to training from the information area on the left side of the screen.

The remaining steps of this guide include some basic instruction on how to perform each suggested step. However, the training resources listed above will provide full training, including tips, best practices, and in depth training on common tasks and functions.

### STEP 2 – Remove Unnecessary Policies from your Working Manual

Both the HR Manual and the Employee Handbook *Working Manuals* have been pre-filled with **all** model policies available. Because there are model policies available to fit a variety of organization sizes and industries, *there will be policies you need to remove before you begin customization.* The Policy Inclusion Guidance below will give you information on specific areas where policies will need to be removed. However, you should review all of the policies in both the HR Manual and the Employee Handbook and remove any that do not apply to your organization.

- **Family Medical Leave Act**

If you **DO NOT** need to comply with FMLA, you will need to make the following changes:

|                   | <b>Include</b>                 | <b>Delete</b>   |
|-------------------|--------------------------------|---|
| HR Policy Manual  | 8011 (Leaves of Absence)       | 8010 (Family and Medical Leave<br>8060 (Personal and Other Leaves of Absence) |
| Employee Handbook | 7041 (Leave Policy – Non-FMLA) | 7040 (Leaves of Absence)  |

If you **DO** need to comply with FMLA, you will need to make the following changes:

|                   | <b>Include</b>   | <b>Delete</b>                  |
|-------------------|--|--------------------------------|
| HR Policy Manual  | 8010 (Family and Medical Leave)<br>8060 (Personal and Other Leaves of Absence) | 8011 (Leaves of Absence)       |
| Employee Handbook | 7040 (Leaves of Absence)   | 7041 (Leave Policy – Non-FMLA) |

- **Paid Time Off**

If your organization utilizes **Paid Time Off** vs. separate vacation and sick leave, you will need to make the following changes:

|                   | <b>Include</b>       | <b>Delete</b>                         |
|-------------------|----------------------|---------------------------------------|
| HR Policy Manual  | 8065 (Paid Time Off) | 8070 (Sick Leave)<br>8080 (Vacations) |
| Employee Handbook | 7045 (Paid Time Off) | 7050 (Sick Leave)<br>7060 (Vacations) |

If your organization has separate **Vacation** and **Sick** leave policies and does not utilize a PTO system, you will need to make the following changes:

|                   | <b>Include</b>                        | <b>Delete</b>        |
|-------------------|---------------------------------------|----------------------|
| HR Policy Manual  | 8070 (Sick Leave)<br>8080 (Vacations) | 8065 (Paid Time Off) |
| Employee Handbook | 7050 (Sick Leave)<br>7060 (Vacations) | 7045 (Paid Time Off) |

- **Financial Institutions**

Several policies that only apply to financial institutions are included in the HR Policy Manual. If you **ARE NOT** a financial institution, you will need to make the following changes:

|                   | <b>Delete</b>   |
|-------------------|---|
| HR Policy Manual  | 4070 (S.A.F.E. Act)<br>6072 (Personal Finances)<br>6075 (Personal Financial Transactions) |
| Employee Handbook | 5079 (Personal Finances)<br>5081 (Personal Financial Transactions)                        |

## **STEP 3 – Print Your Key Fields Guide and State Law Customizing Guide**

- **Key Fields Guide**

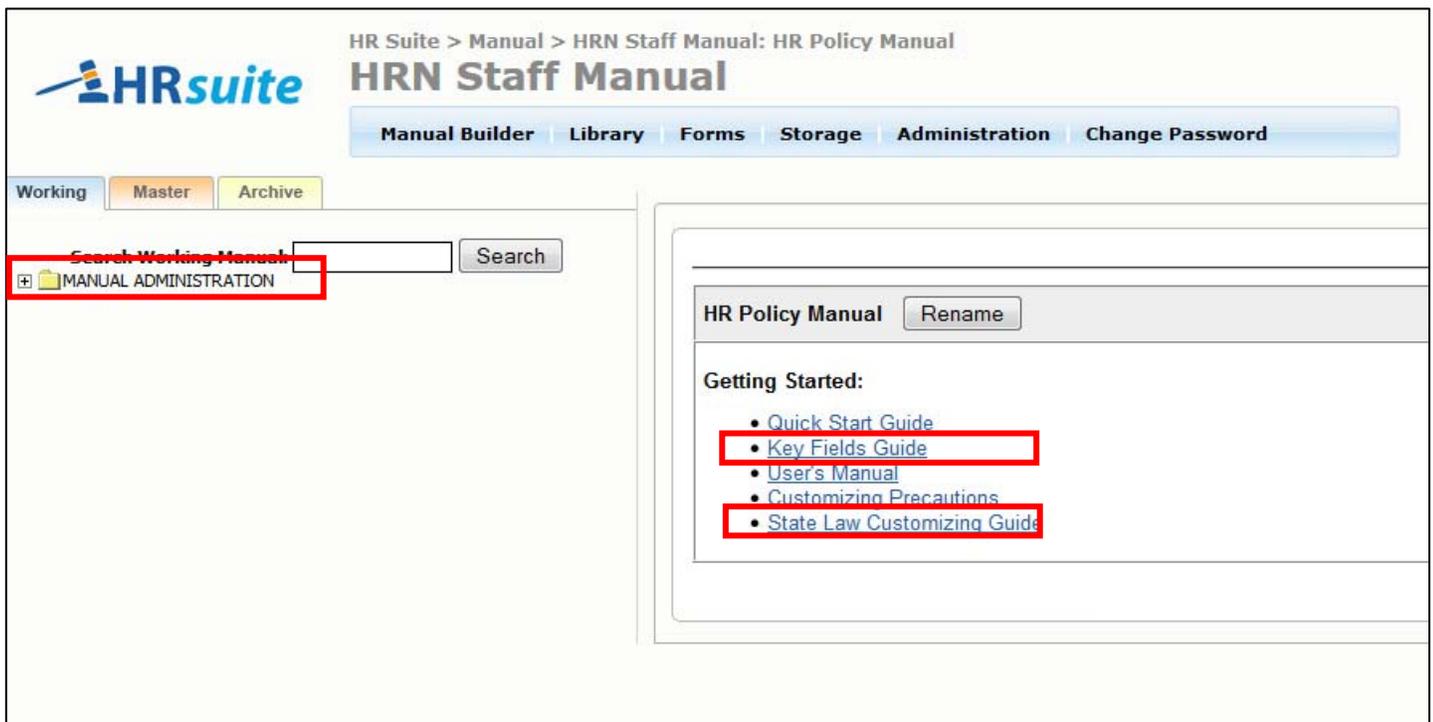
Key Fields are bits of information which are important to completing a policy, but will vary from organization to organization. For example: How many hours must an employee work to be eligible for paid vacation time? Not every policy contains Key Fields, but some policies contain many Key Fields. The Key Fields Guide includes a full list of the Key Fields, their location, their number, and a brief description of the information needed. It may be helpful to use this document to gather the necessary information prior to customizing your HR Policy Manual or Employee Handbook. We suggest customizing your HR Policy Manual first then the Employee Handbook.

- **State Law Customizing Guide**

The HR Policy Manual and Employee Handbook have been written for **private employers** and to comply with **federal law**. There may be (and in many cases are) different requirements for government employers. The manuals also contain common policies adopted by employers that may go beyond those required by federal law (such as break and leave policies). **NO STATE OR LOCAL LAW ISSUES HAVE BEEN ADDRESSED.** Employment law differs considerably from state to state and in some cases within local jurisdictions. **Therefore, all policies should be reviewed by legal counsel prior to their implementation to ensure that they meet all federal, state, and local requirements.**

The State Law Customizing Guide seeks to highlight some of the common areas where state and/or local law must be considered and integrated into the HR Policy Manual and Employee Handbook. The guide is not exhaustive but may be used as a starting point for HR Managers.

Both the Key Fields Guide and the State Law Customizing Guide can be found on the Manuals Home Page. If the documents list is not visible, click on the “Manual Administration” folder.



## STEP 4 – Review the Key Fields Guide and Complete Key Fields

Review and gather the required Key Field information and enter it appropriately. Although there are key fields that are common between the Manual and Handbook, key fields must be defined separately for each manual. The Multi-Key Fields Update Utility allows users to quickly update multiple key fields at once for each manual. *Refer to the User's Guide or the New User Training videos for more details on completing Key Field input.*

## STEP 5 – Customize Content and Insert New Policies and Text

It is recommended you customize your HR Policy Manual first, then customize the Employee Handbook.

When you open a specific policy, the full text of the policy is available on the right side of the screen. When customizing the content of a policy you will be in an editing environment similar to Microsoft Word. To edit existing text, simply place your cursor within the text and begin typing, deleting, or using the formatting tools in the Toolbar. Please refer to the User’s Guide or the New User Training videos for more information on editing policies.

You may wish to create new policies and paste text you currently have in other sources (Microsoft Word, Excel, etc.). Edits to text and insertions of new policies in the HR Policy Manual do NOT automatically carry over to the Employee Handbook. See the User’s Guide or the New User Training videos for more detailed information on editing policies.

- **Terminology**

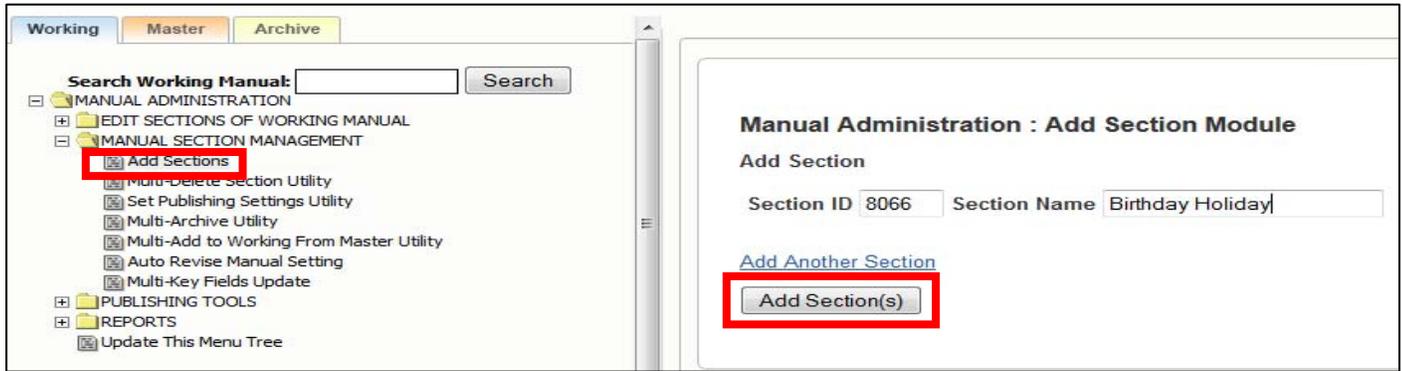
Terminology differs from company to company. Some companies call their employees “employees”, while others may call them “associates”. Titles for the organization also widely vary. In HR Suite, we refer to the organization as “Company” and the employees as “employees”. If you should desire to change this, you can do a search and replace in each policy.

The Search and Replace icon  allows you to search a single policy for specific text and replace it with new text. This icon is found in the toolbar when editing a policy. This will replace **all instances** of the specific text in that policy– you may choose to use CTRL+F to use your browser’s “FIND” tool and view each instance of the specific text to ensure that your policy reads the way you intend.

- **Adding Unique Policies to the Working Manual**

1. Click on the “Working” tab at the top left of the screen to make sure you are in the *Working Manual*.
2. Using the plus signs to the left of each folder, expand the “Manual Administration” and the “Manual Section Management” folders.
3. Click the “Add Sections” link.
4. On the right side of the screen, a form will appear to allow you to add a unique policy. Type the policy number in the “Section ID” field and the policy name in the “Section Name” field. **Tip: The policy number must be greater than 1000. Section numbers below 1000 have no associated Chapter folder and will not be accessible for editing in the *Working Manual*.**
5. To add more than one policy at one time, click the “Add Another Section” link.

- **Adding Unique Policies to the Working Manual (*continued*)**



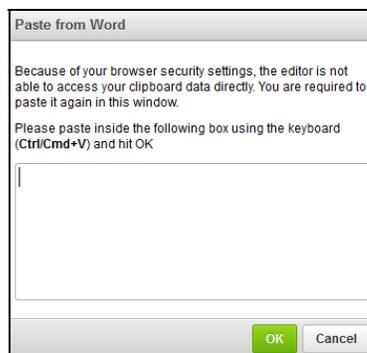
6. Click the “Add Section(s)” button. This creates a blank policy in your *Working Manual*. The new policy will appear in the Working Manual in numeric order.
7. To add a new chapter, type in the Chapter number in the “Section ID” field and Chapter name in the “Section Name” field. Chapters must be divisible by 1000 (i.e. 10000, 11000, etc.). Then click the “Add Section(s)” button. Policies will not be available for editing in the *Working Manual* if they do not have an associated Chapter.

- **Pasting Text from Microsoft Word**

1. Highlight and copy the text in the Word document.
2. In the HR Suite policy, place your cursor where you want the text to be pasted then click the “Paste from Word” icon in the toolbar.



3. A pop up dialog box opens to allow you to paste in the content. Use CTRL+V to paste the content into the dialog box.



4. Pasting from Word will retain much of the font formatting from Word; however, there may be some formatting that does not carry over and may need to be reformatted. All text will paste in, and bold, italic, and underline formatting typically paste in with no issues. Please refer to the User's Guide or the New User Training videos for more information on formatting issues.

## **STEP 6 – Review the State Law Customizing Guide**

Review the State law Customizing Guide you printed in step 2. Make any edits in the HR Policy Manual and Employee Handbook that are required to conform with your specific state statutes.

## **STEP 7 – Customize Your Employee Handbook**

Make necessary changes in the Employee Handbook so that it is consistent with the HR Policy Manual and also with your state and/or local law.

## **STEP 8 – Publish**

Publish your HR Policy Manual and Employee Handbook. See the User's Guide or New User Training Videos for more detailed information on the publishing process.

## **STEP 9 – Post on the Home Page**

Make your HR Policy Manual and Employee Handbook available for employee viewing by posting them on the Home Page. See the User's Guide or New User Training Videos for information on posting manuals to the home page.

## **STEP 10 – Get Familiar With HR Suite**

Review the Library and Forms areas of HR Suite to get an understanding of what is included in these services.