



EMPLOYEE SELF-SERVICE USER GUIDE

GETTING STARTED WITH hrHQ

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hrHQ OVERVIEW

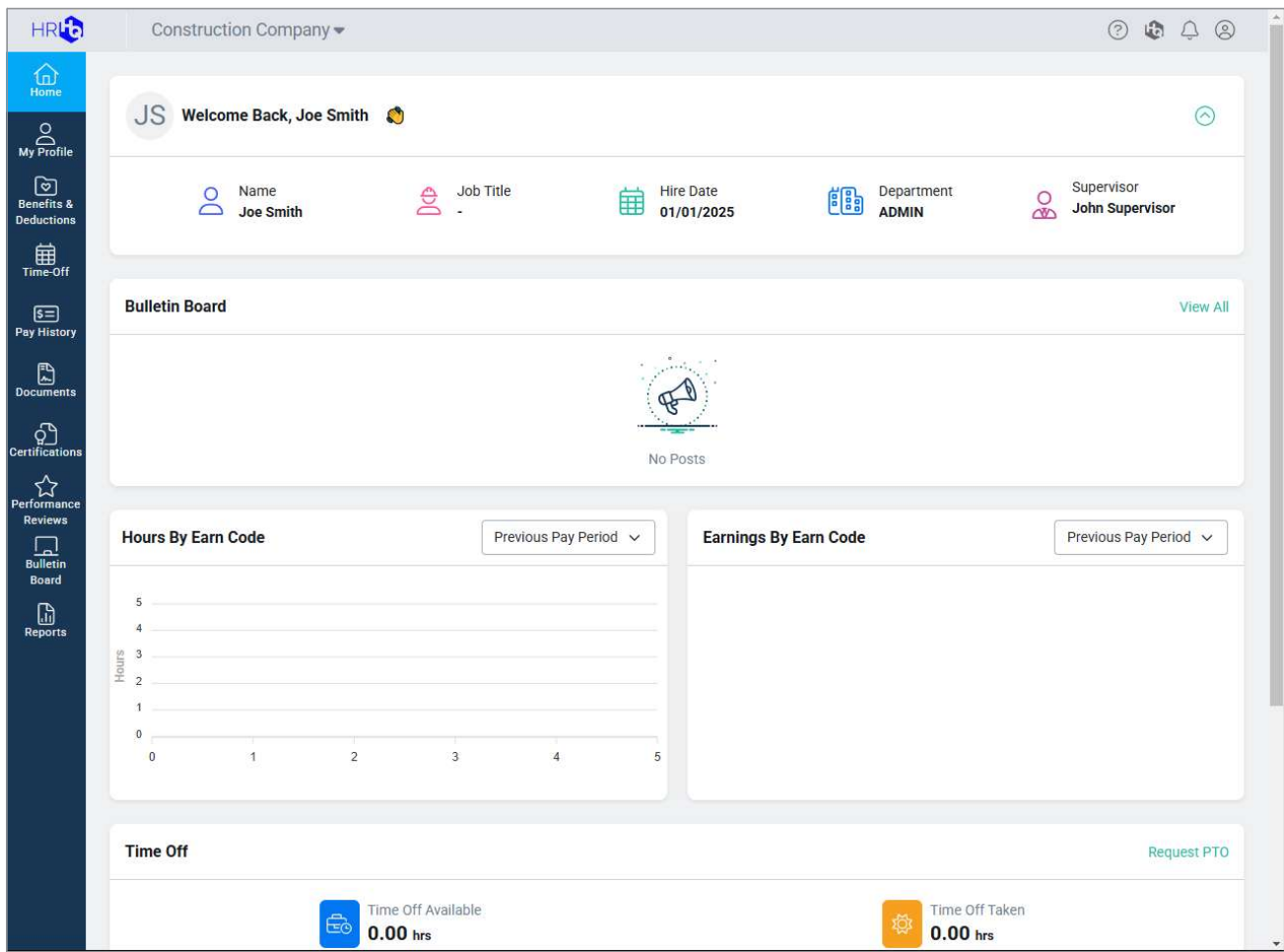
hrHQ is a standalone, web-based human capital management (HCM) application that can integrate with FOUNDATION®. With hrHQ employee self-service options, you can update your employee record, manage your time off, complete performance reviews, access reports, and view your company's latest updates.

Log in by going to hrhqdashboard.myhqsuite.com.

HOME SCREEN

The Home screen is the first screen you see when you log in. From this screen you can view an overview of your employee record and your company's most recent Bulletin Board posts.

The navigation menu on the left side of the screen allows you to navigate to the My Profile, Benefits & Deductions, Time-Off, Pay History, Documents, Certifications, Performance Reviews, Bulletin Board, and Reports screens. From the icon toolbar at the top of the screen, you can access the Help Center, switch products, view alerts, and log out of hrHQ.



Welcome Banner

The welcome banner displays a welcome message and your basic employee record information. You can collapse your employee information by selecting the arrow icon in the upper-right corner of the banner.

Bulletin Board

The Bulletin Board widget previews up to three posts submitted by your company's HR Department. Each post is previewed by its title, a sample of its content, how it was categorized, and the date it was posted. You can click on any post preview to view the full content.

To view all posts, select [View All] in the upper-right corner of the widget. This forwards you to the Bulletin Board screen.

Hours by Earn Code

The Hours by Earn Code widget displays your hours by earn code for the most recent pay period. To view your year-to-date hours, select "Year To Date" from the dropdown menu in the upper-right corner of the widget.

Earnings by Earn Code

The Earnings by Earn Code widget displays your earnings by earn code for the most recent pay period. To view your year-to-date earnings, select "Year To Date" from the dropdown menu in the upper-right corner of the widget.

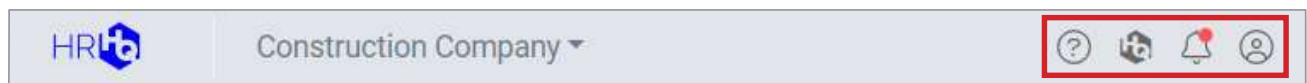
Time Off

The Time Off widget displays an overview of your current time off status and requests. Your available, taken, and accrued time off hours are listed across the top of the widget. Your most recent time off requests are listed in a grid, and can be sorted by clicking on the column headers.

To submit a new time off request from this screen, select [Request PTO] in the upper-right corner of the widget. This forwards you to the Time-Off screen.

ICON TOOLBAR

The icon toolbar is located at the top of all hrHQ screens. Four icon shortcuts are available in the upper-right corner of the screen.



Help Center

The question mark icon opens the Help Center. The Help Center consists of the hrHQ user guide, quick reference guides, and video tutorials.

HQ Switch Product

If you have other HQSuite apps, you will see the HQ icon. Clicking this icon allows you to toggle CrewHQ, ExecutiveHQ, ProjectHQ, and SafetyHQ.

Notification Center

The bell icon opens the Notification Center. The Notification Center is where you will see any notifications related to your account or company. A red dot appears over this icon if you have any unread notifications.

My Account

The My Account icon opens a dropdown menu with the option to sign out.

Change Password

Clicking on “Change Password” opens the Change Password page. From this page you can change your password.

Auth. Preferences

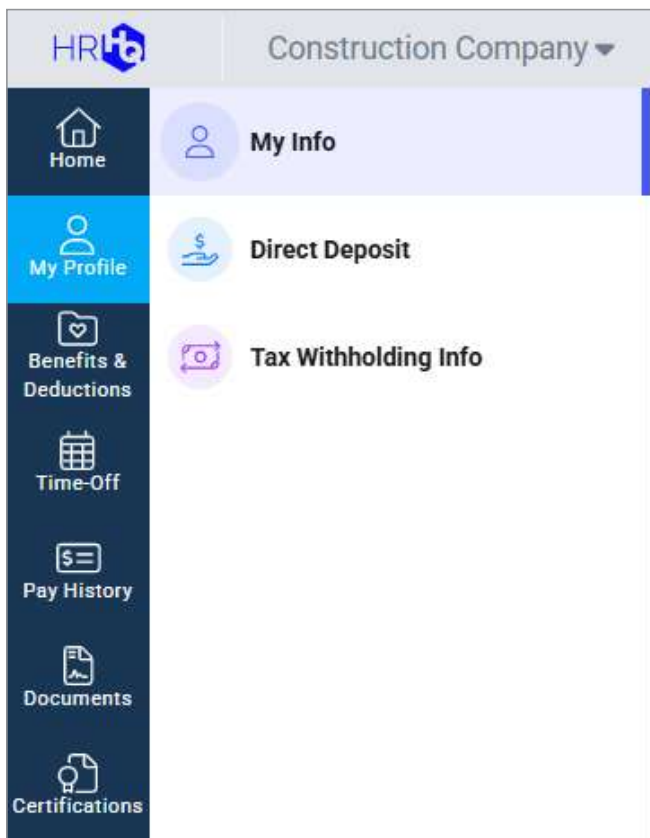
Clicking on “Auth. Preferences” opens the Authentication Preferences page. From this page you can set up or change your form of authentication. Options available are phone, email, and authenticator app.

Sign Out

“Sign Out” signs you out of hrHQ.

SIDE MENUS

Various screens in hrHQ, including My Profile, Time-Off, Pay History, and Performance Reviews, have side menus to navigate the records or change the default screen view.

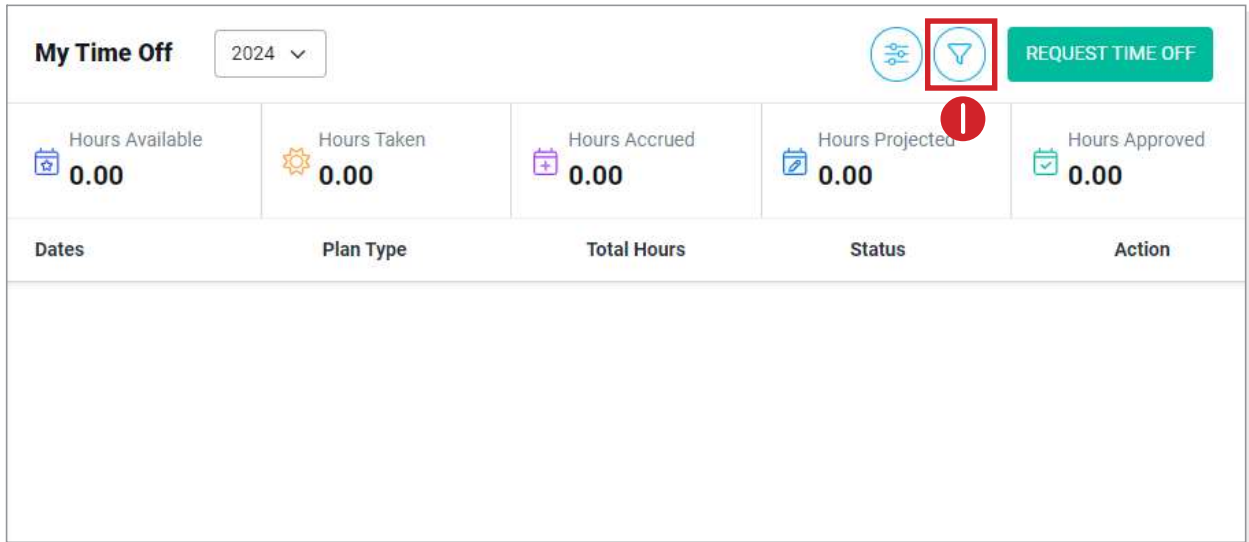


FILTERS

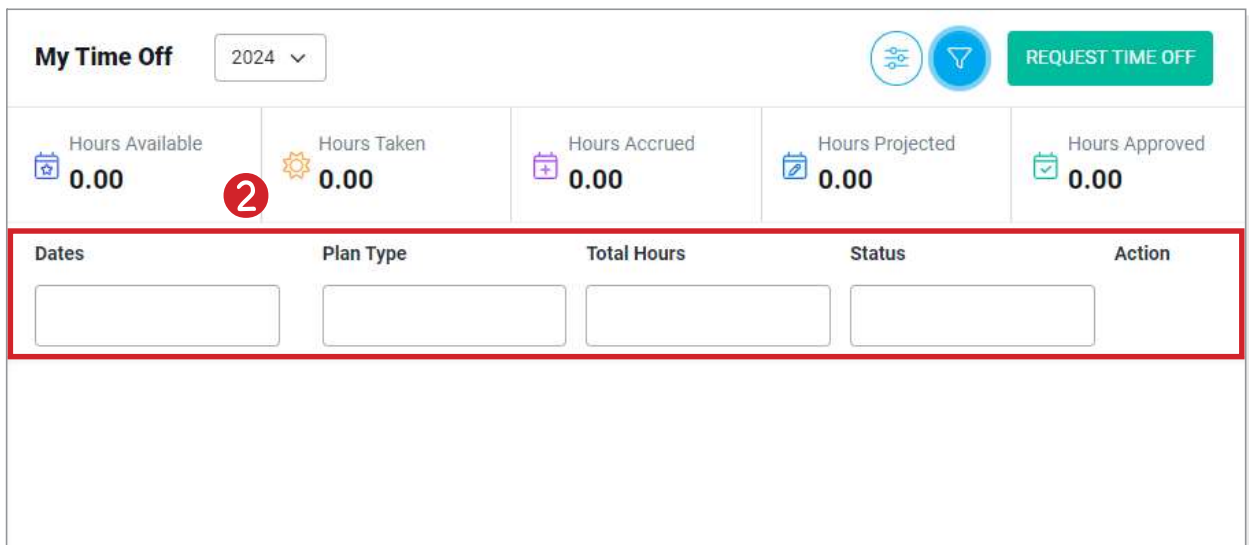
Various screens in hrHQ contain filters to allow you to customize your view. When available, the filter icon appears on the upper-right corner of the screen.

Applying Filters

1. Select the filter icon in the upper-right corner of the screen.



2. Blank fields appear in each column. Enter the information you want to filter by in the appropriate column.

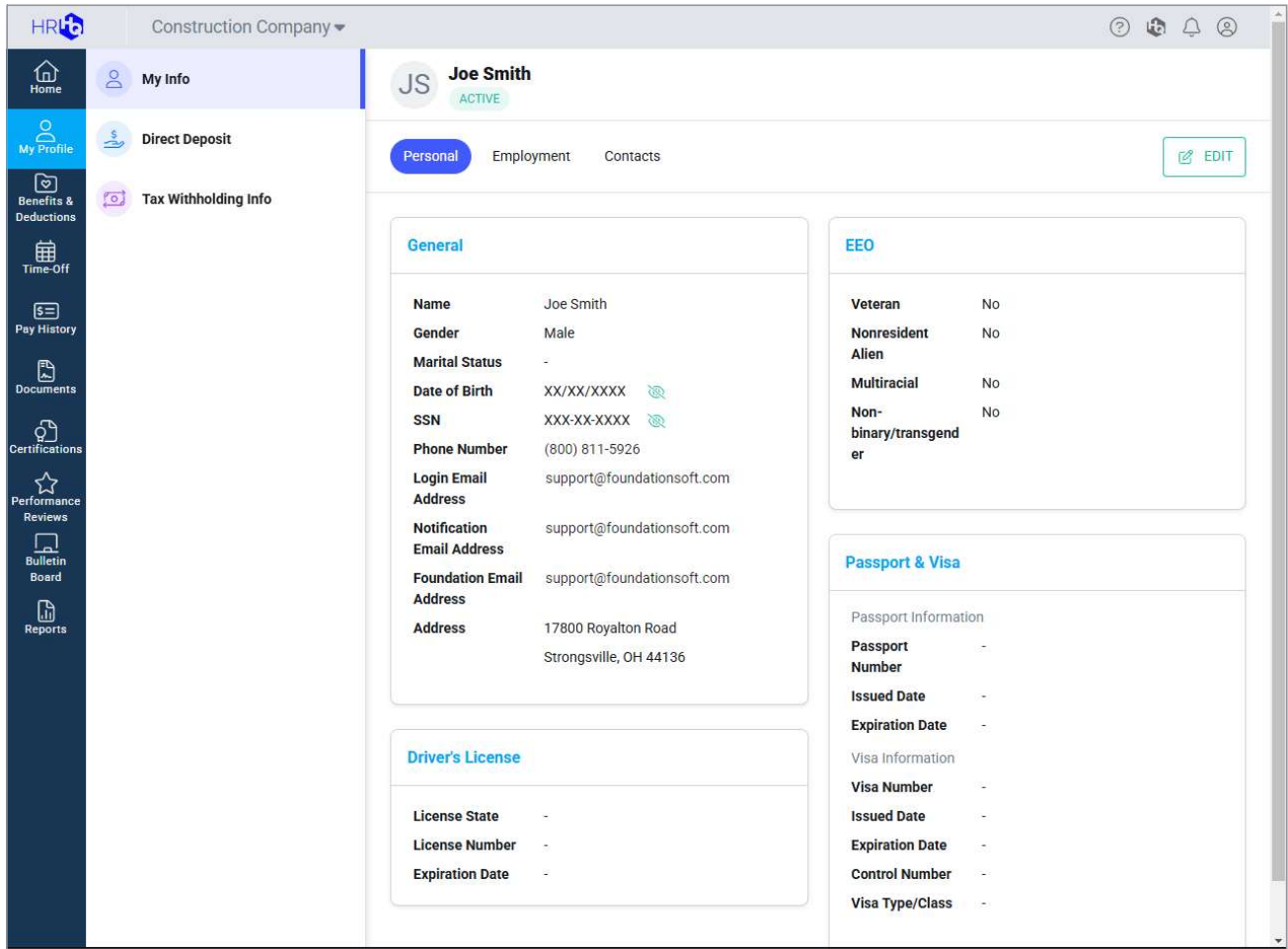


3. The records will filter based on your entries. Clear fields to view all records.

hrHQ MY PROFILE

On the My Profile screen you can view and update your contact information, direct deposit settings, and tax withholding information.

You can use the side menu to navigate to the My Profile settings you want to view or change.

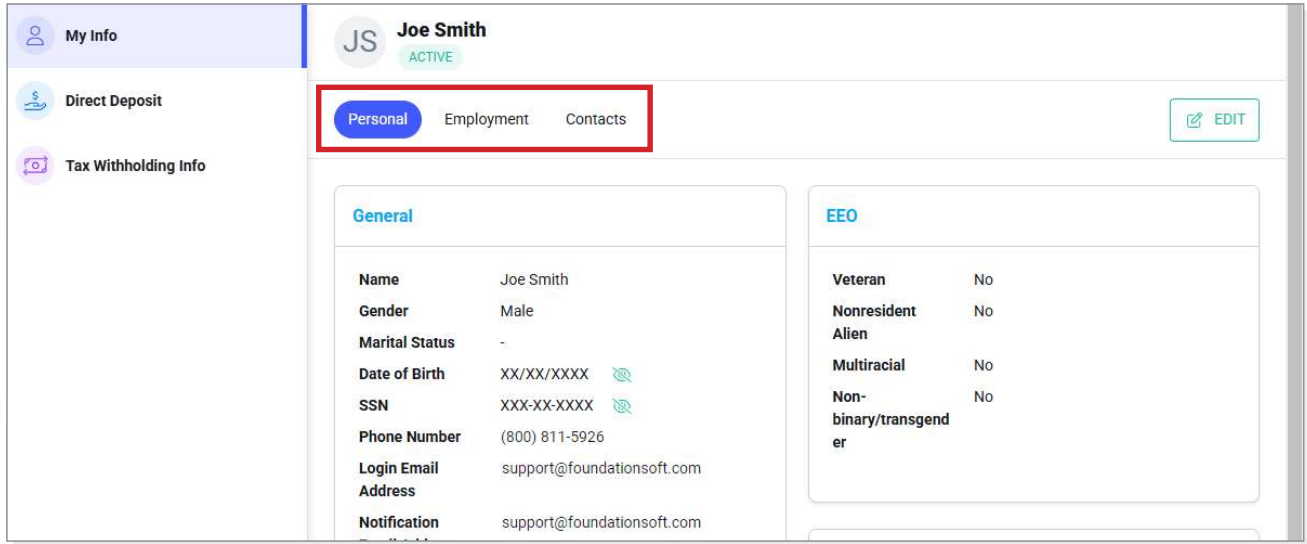


Note: Your updates appear immediately after they are submitted, but are subject to HR approval. If your update is denied by HR, you will be notified via the Notification Center in the icon toolbar.

MY INFO

The My Info screen is the default screen in My Profile. On this screen you can view and edit your personal data, employment history, and emergency contact information.

Select the “Personal,” “Employment,” and “Contacts” tabs at the top of the screen to navigate your records.

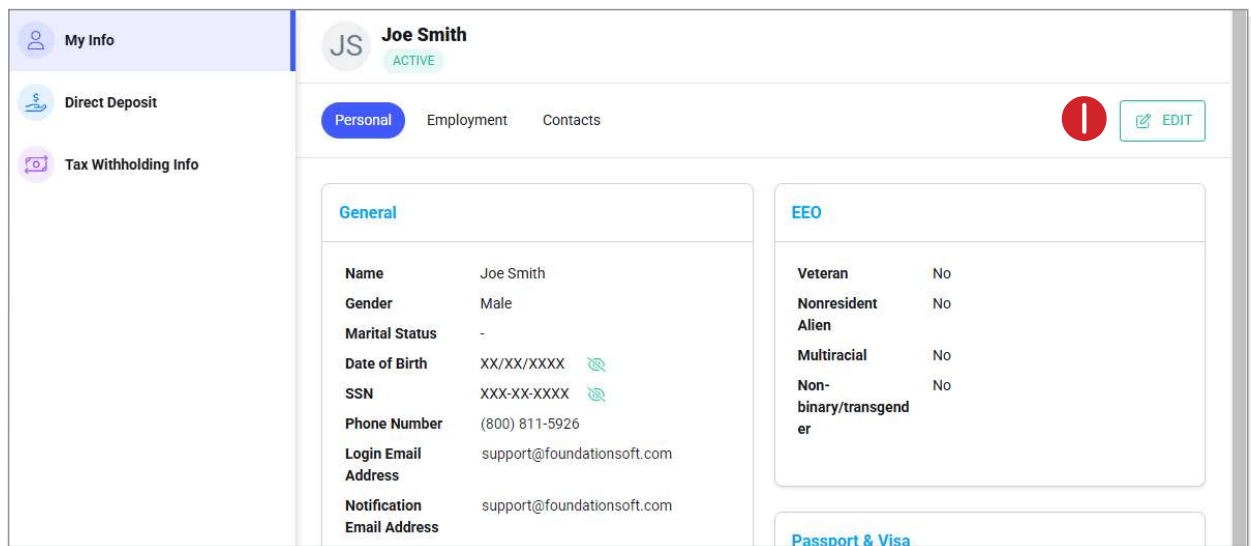


“Personal” Tab

The “Personal” tab displays your general, EEO (Equal Employment Opportunity), driver’s license, passport, and visa information. You can edit the information on this tab.

Editing Your Personal Information

1. Select [EDIT] in the upper-right corner of the screen.



2. Update the appropriate fields.
3. Select [SAVE].

“Employment” Tab

The “Employment” tab displays your employment information. This information is managed by your HR administrator and is read-only.

“Contacts” Tab

The “Contacts” tab displays your entered contacts. You can add, edit, or delete contacts on this tab.

Adding Contacts

1. Select [ADD CONTACT] in the upper-right corner of the screen.

Contact Person	Relationship	Emergency...	Dependent	Beneficiary	Mobile	Actions
Emergency Contact	Other	✓			(800) 246-0800	

2. Complete all relevant and required *Add Contact* fields.
3. Select [SAVE].

4. Repeat steps 1-3 to add all your contacts.

Editing Contacts

1. Hover over the contact you want to edit. Additional option buttons appear in the *Actions* column.
2. Select [Edit]. The Edit Contact screen opens.

Contact Person	Relationship	Emergency...	Dependent	Beneficiary	Mobile	Actions
New Contact	Other			✓	(800) 246-0801	
Emergency Contact	Other	✓			(800) 246-0801	Edit Delete

3. Edit your contact.
4. Select [SAVE].

My Info | **Edit Contact** CA **4** SAVE

Contact Name **3**

Prefix: [Dropdown] First Name *: [Emergency] Middle Name: [] Last Name *: [Contact] Suffix: []

Contact Info

Relationship *: [Other] +

Emergency Contact
 Dependent
 Beneficiary

Phone Number & Email Address

Email Address: [] Phone Number *: []

Deleting Contacts

1. Hover over the contact you want to delete. Additional option buttons appear in the *Actions* column.
2. Select [Delete].

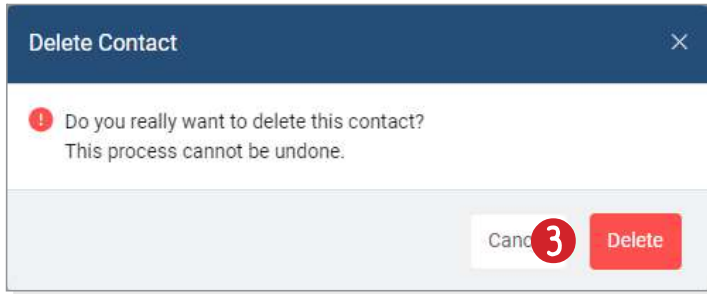
My Info | **Joe Smith** ACTIVE

Personal | Employment | **Contacts**

Employee Contacts ADD CONTACT

Contact Person	Relationship	Emergency...	Dependent	Beneficiary	Mobile	Actions
New Contact	Other	1		✓	(800) 246-0800	2 [Delete]
Emergency Contact	Other	✓			(800) 246-0800	

3. A dialog box opens asking you to confirm. Select [Delete].



DIRECT DEPOSIT

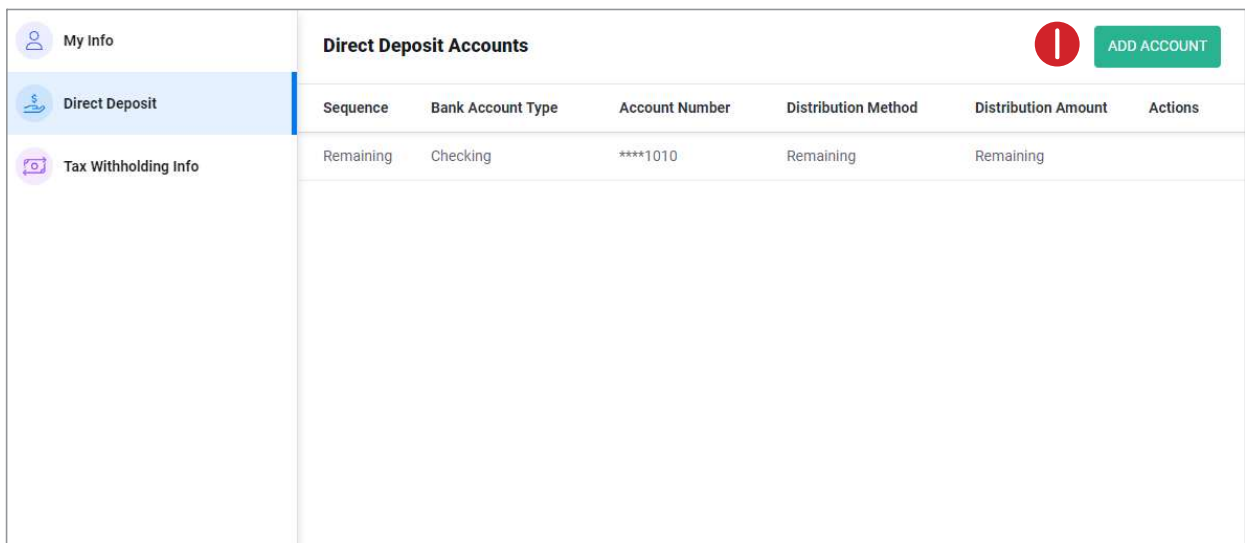
The Direct Deposit Accounts screen displays your direct deposit accounts. You can add, edit, or delete accounts on this screen.

To access the Direct Deposit Accounts screen, select "Direct Deposit" from the My Profile side menu.

Note: You must have at least one account with the *Sequence* field set to "Remaining" saved in hrHQ.

Adding Accounts

1. Select [ADD ACCOUNT] in the upper-right corner of the screen. The Add Bank Accounts screen opens.

The screenshot shows the "Direct Deposit Accounts" screen. On the left is a navigation menu with "My Info", "Direct Deposit" (selected), and "Tax Withholding Info". The main area has a table with columns: Sequence, Bank Account Type, Account Number, Distribution Method, Distribution Amount, and Actions. A red circle with a vertical bar is in the top right, next to an "ADD ACCOUNT" button. The table contains one row of data.

Sequence	Bank Account Type	Account Number	Distribution Method	Distribution Amount	Actions
Remaining	Checking	****1010	Remaining	Remaining	

2. Select the [ADD ACCOUNT] button at the bottom of the screen.

The screenshot shows the 'Add Bank Account(s)' interface. On the left, there is a navigation menu with 'My Info', 'Direct Deposit', and 'Tax Withholding Info'. The main area is titled 'Add Bank Account(s)' and has 'CANCEL' and 'SUBMIT' buttons at the top right. Below the title, there are two sections: 'Deposit Order' and 'Checking ****6789'. The 'Deposit Order' section contains a table with one row: 'R' in a box, 'Checking ****6789'. The 'Checking ****6789' section lists details: Status (Active), Sequence (Remaining), Bank Account Type (Checking), Pre-note (Yes), Distribution Method (Remaining), Account Number (****6789), and Routing Number (****1039). At the bottom, a blue 'ADD ACCOUNT' button is highlighted with a red circle containing the number '2'.

3. In the *New Account* section, complete all required fields.

4. Select [SAVE & DONE].

The screenshot shows the 'Add Bank Account(s)' interface with the 'New Account' section expanded. The 'Deposit Order' section now has two rows: '1' in a box, 'New Account' (with a trash icon) and 'R' in a box, 'Checking ****6789'. The 'New Account' section contains the following fields: 'Bank Account Type *' (Checking, highlighted with a red circle '3'), 'Distribution Method *' (Percent of Remaining), 'Distribution Percentage *' (25%), 'Account Number *' (****0101), 'Re-Enter Account Number *' (****0101), and 'Routing Number *' (****2084). There is an 'UPLOAD' button for 'Voiled Check' and a 'Description' field. At the bottom, a 'CANCEL' button is on the left, and 'SAVE & DONE' and 'SAVE & NEW' buttons are on the right. The 'SAVE & NEW' button is highlighted with a red circle containing the number '4'.

5. Select [SUBMIT].

Add Bank Account(s) CANCEL **5** SUBMIT

Deposit Order EDIT

Checking ***0101**

Sequence

1	•	Checking *****0101	
R	•	Checking *****6789	

ADD ACCOUNT

Status
• Active

Sequence
1

Bank Account Type
Checking

Pre-note
No

Distribution Method
Percent of Remaining

Distribution Percentage
25%

Account Number
*****0101

Routing Number

Editing Accounts

1. Hover over the account you want to edit. An [Edit] button appears in the *Actions* column.
2. Select [Edit].

Direct Deposit Accounts ADD ACCOUNT

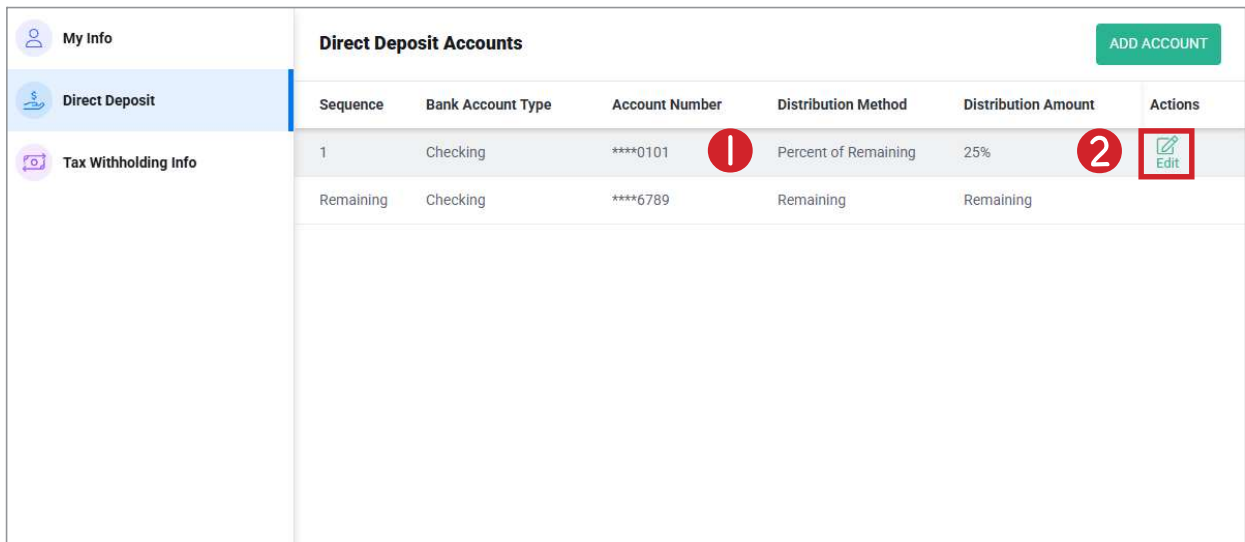
Sequence	Bank Account Type	Account Number	Distribution Method	Distribution Amount	Actions
1	Checking	*****0101	Percent of Remaining	25%	
Remaining	Checking	*****6789	Remaining	Remaining	

- In the *Edit Bank Account* section, edit your account.
- Select [SAVE].

- Select [SUBMIT].

Deleting Accounts

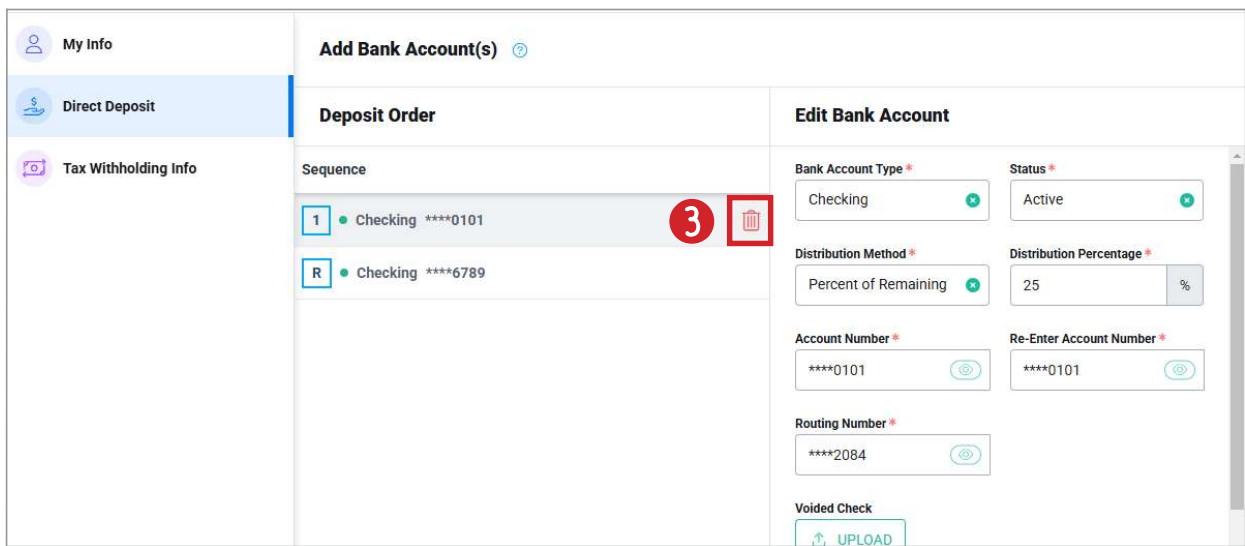
1. Hover over the account you want to delete. An [Edit] button appears in the *Actions* column.
2. Select [Edit].



The screenshot shows a user interface with a sidebar on the left containing 'My Info', 'Direct Deposit', and 'Tax Withholding Info'. The main content area is titled 'Direct Deposit Accounts' and features a table with the following columns: Sequence, Bank Account Type, Account Number, Distribution Method, Distribution Amount, and Actions. A green 'ADD ACCOUNT' button is located in the top right corner. The table contains two rows of data. The first row has Sequence '1', Bank Account Type 'Checking', Account Number '****0101', Distribution Method 'Percent of Remaining', and Distribution Amount '25%'. The second row has Sequence 'Remaining', Bank Account Type 'Checking', Account Number '****6789', Distribution Method 'Remaining', and Distribution Amount 'Remaining'. A red circle with the number '1' is placed over the Account Number '****0101' in the first row, and a red circle with the number '2' is placed over the 'Edit' button in the Actions column of the same row.

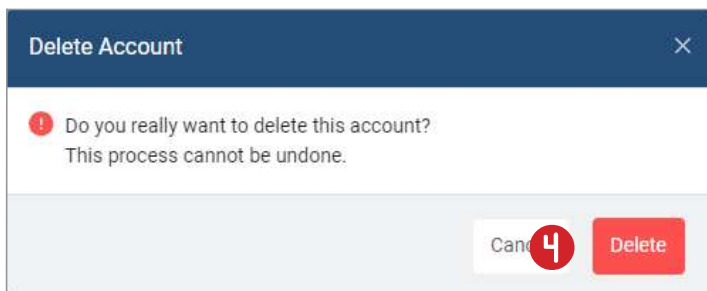
Sequence	Bank Account Type	Account Number	Distribution Method	Distribution Amount	Actions
1	Checking	****0101	Percent of Remaining	25%	Edit
Remaining	Checking	****6789	Remaining	Remaining	

3. In the *Deposit Order* section, select the delete icon next to the account you want to delete.



The screenshot shows a dialog box titled 'Add Bank Account(s)'. It is divided into two main sections: 'Deposit Order' on the left and 'Edit Bank Account' on the right. The 'Deposit Order' section contains a table with two rows. The first row has Sequence '1', Bank Account Type 'Checking', and Account Number '****0101'. The second row has Sequence 'R', Bank Account Type 'Checking', and Account Number '****6789'. A red circle with the number '3' is placed over the first row, and a red box highlights the delete icon (a trash can) next to it. The 'Edit Bank Account' section contains several input fields: 'Bank Account Type' (Checking), 'Status' (Active), 'Distribution Method' (Percent of Remaining), 'Distribution Percentage' (25%), 'Account Number' (****0101), 'Re-Enter Account Number' (****0101), and 'Routing Number' (****2084). There is also an 'UPLOAD' button for 'Voided Check'.

4. A dialog box opens asking you to confirm. Select [Delete] to delete and return the Manage Bank Accounts screen.



The screenshot shows a 'Delete Account' dialog box. The title bar is dark blue with a close button (X). The main content area has a white background with a red warning icon and the text: 'Do you really want to delete this account? This process cannot be undone.' At the bottom, there are two buttons: 'Cancel' and 'Delete'. A red circle with the number '4' is placed over the 'Delete' button.

5. Select [SAVE].

Manage Bank Accounts ? CANCEL **5** SAVE

Deposit Order

Sequence
R • Checking ****1010 🗑️

Account Information

Bank Account Type * Status *

Distribution Method * Distribution Amount

Account Number * Re-Enter Account Number *

Routing Number *

VOIDED CHECK

Note: You must have at least one account entered to save.

Viewing Account Details

1. Click on the account you want to view. The Account Details pane opens on the right side of the screen.
2. Select the "X" in the upper-right-corner of the pane to close.

Direct Deposit Accounts

Sequence	Bank Account Type	Account Number	Distrib
Remaining	Checking	****1010	Remain

Account Details **2** ×

Checking ****1010 EDIT

Status
● Active

Sequence
Remaining

Bank Account Type
Checking

Pre-note
Yes

Distribution Method
Remaining

Routing Number

Note: You can also edit the selected account by selecting [EDIT] from this pane.

Account Details ×

Checking ****1010 EDIT

Status
● Active

Sequence

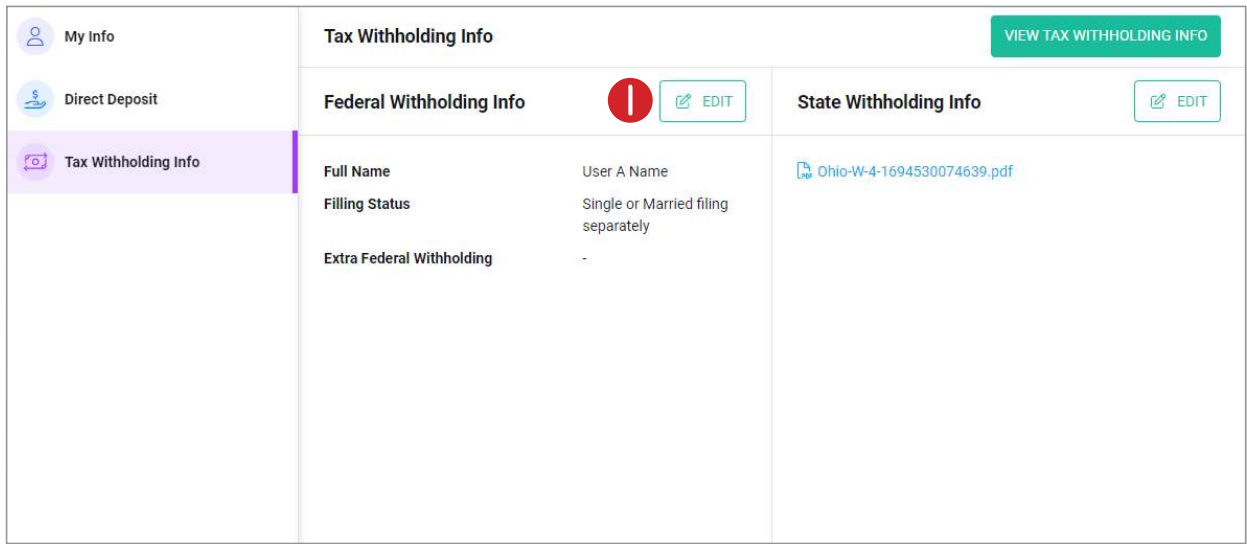
TAX WITHHOLDING INFO

The Tax Withholding Info screen displays your federal and state tax withholding details. You can view and edit your withholding status on this screen.

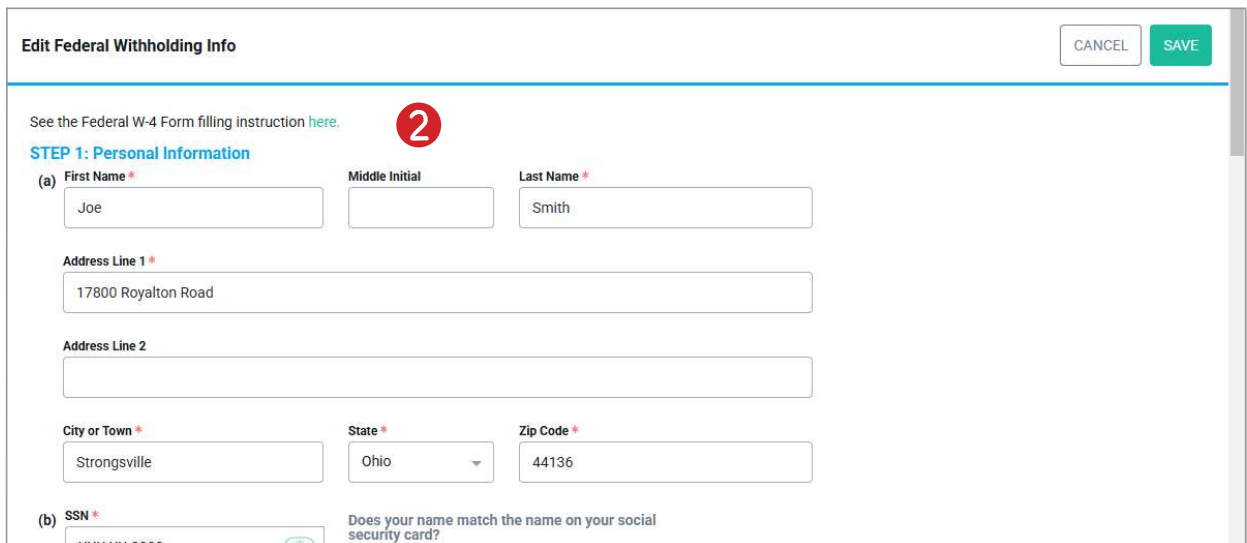
To access the Tax Withholding Info screen, select "Tax Withholding Info" from the My Profile side menu.

Editing Federal Withholding Info

1. In the *Federal Withholding Info* section, select [EDIT]. The Edit Federal Withholding Info screen opens.



2. Edit the appropriate fields in the *STEP 1-4* sections.



- In the "STEP 5: Sign Here" *Employee Signature* field use your mouse, penpad, or touchpad to sign your name.
- Select [SAVE].

Edit Federal Withholding Info

CAN 4
SAVE

STEP 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee Signature*

I agree that my signature below is an electronic signature and has the same effect as my written signature.
Uncheck this box if you do not agree to provide an electronic signature.

3

*Please Use Mouse, Penpad, Or Finger (On Touchscreen Device) To Sign.

LOAD SIGNATURE
CLEAR

Date

Editing State Withholding Info

- In the *State Withholding Info* section, select [EDIT]. The Edit State Withholding Info screen opens.

- My Info
- Direct Deposit
- Tax Withholding Info

Tax Withholding Info
VIEW TAX WITHHOLDING INFO

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Federal Withholding Info EDIT </div> <p>Full Name User A Name</p> <p>Filing Status Single or Married filing separately</p> <p>Extra Federal Withholding -</p>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> State Withholding Info EDIT </div> <p>Ohio-W-4-1694530074639.pdf</p>
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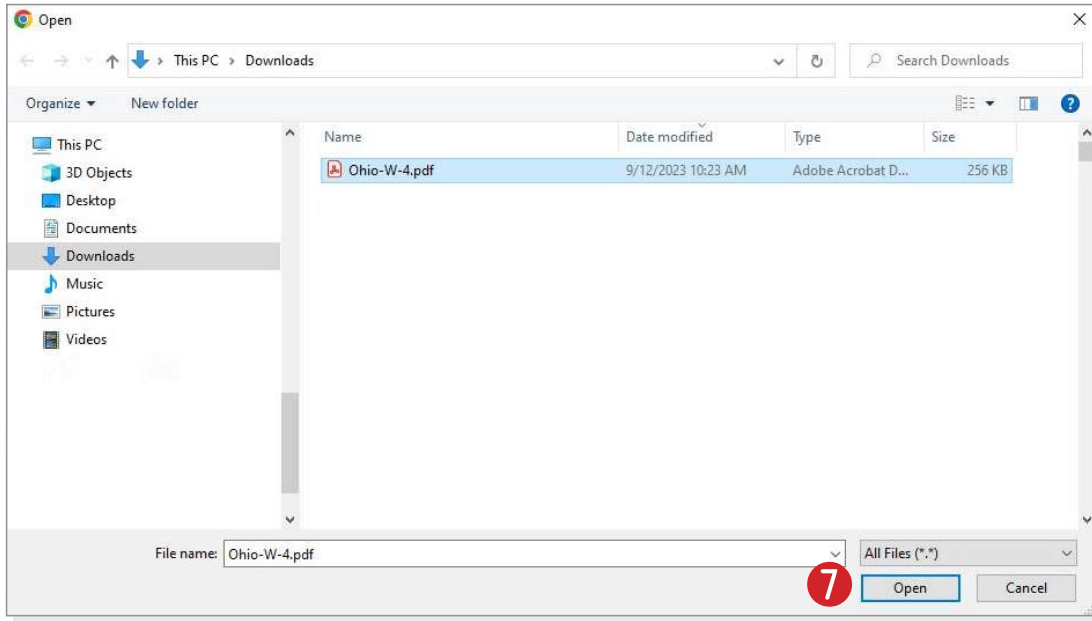
2. Select the delete icon next to your uploaded state W-4 PDF. This removes the file.

The screenshot shows a web form titled "Edit State Withholding Info". In the top right corner, there are two buttons: "CANCEL" and "SAVE". Below the title, there is a horizontal list of files. The first file is "Ohio W-4 Form.pdf". The second file is "Ohio-W-4-1694530074639.pdf", which has a red circle with the number "2" next to it and a red trash can icon to its right. Below the file list, there is a checkbox with the text "I have submitted a hard copy of the document directly to the HR department. (If you are unable to upload your form, please print it out and submit it to your HR department.)".

3. Select the state W-4 PDF link on the left side of the screen. The PDF form downloads to your device,
4. Locate and open the form.
5. Complete and save the form.
6. Return to hrHQ and select [UPLOAD].

The screenshot shows the same "Edit State Withholding Info" form. In the file list, the "Ohio W-4 Form.pdf" link now has a red circle with the number "3" next to it. The "Ohio-W-4-1694530074639.pdf" file is no longer visible. Instead, there is an "UPLOAD" button with an upward arrow icon and a red circle with the number "6" next to it. The checkbox and text below the file list remain the same.

7. The Open dialog box opens. Locate your completed form and select [Open].



8. Confirm your completed state W-4 is attached.

9. Select [SAVE].

The screenshot shows a web form titled 'Edit State Withholding Info'. At the top right, there are 'CANCEL' and 'SAVE' buttons. A red circle with the number 9 is placed over the 'SAVE' button. Below the title, there are two file attachment slots. The first slot contains a PDF icon and the text 'Ohio W-4 Form.pdf'. The second slot contains a PDF icon and the text 'Ohio-W-4-1707253010573.pdf'. A red circle with the number 8 is placed over the second file's icon, and a red square with a trash icon is placed over its right side. Below the attachments, there is a checkbox with the text: 'I have submitted a hard copy of the document directly to the HR department. (If you are unable to upload your form, please print it out and submit it to your HR department.)'

Downloading Completed W-4 Forms

1. Select [VIEW TAX WITHHOLDING INFO] in the upper-right corner of the screen. The View Tax Withholding Information window opens.

The screenshot shows the 'Tax Withholding Info' page. The left sidebar has 'Tax Withholding Info' selected. The main content area has two tabs: 'Federal Withholding Info' and 'State Withholding Info'. The 'Federal Withholding Info' tab is active, showing fields for 'Full Name' (User A Name), 'Filing Status' (Single or Married filing separately), and 'Extra Federal Withholding' (-). The 'State Withholding Info' tab shows a file named 'Ohio-W-4-1694530074639.pdf'. A red circle with a white exclamation mark and a green button labeled 'VIEW TAX WITHHOLDING INFO' are in the top right corner.

2. Select the appropriate tab.
 - a The "Rendered" tab contains forms entered via form fields in hrHQ.
 - b The "Uploaded" tab contains forms entered on the form, either on paper or electronically, then manually uploaded to hrHQ.
3. Check the box next to the forms you want to download.
4. Select [View]. Your form downloads to your local drive.

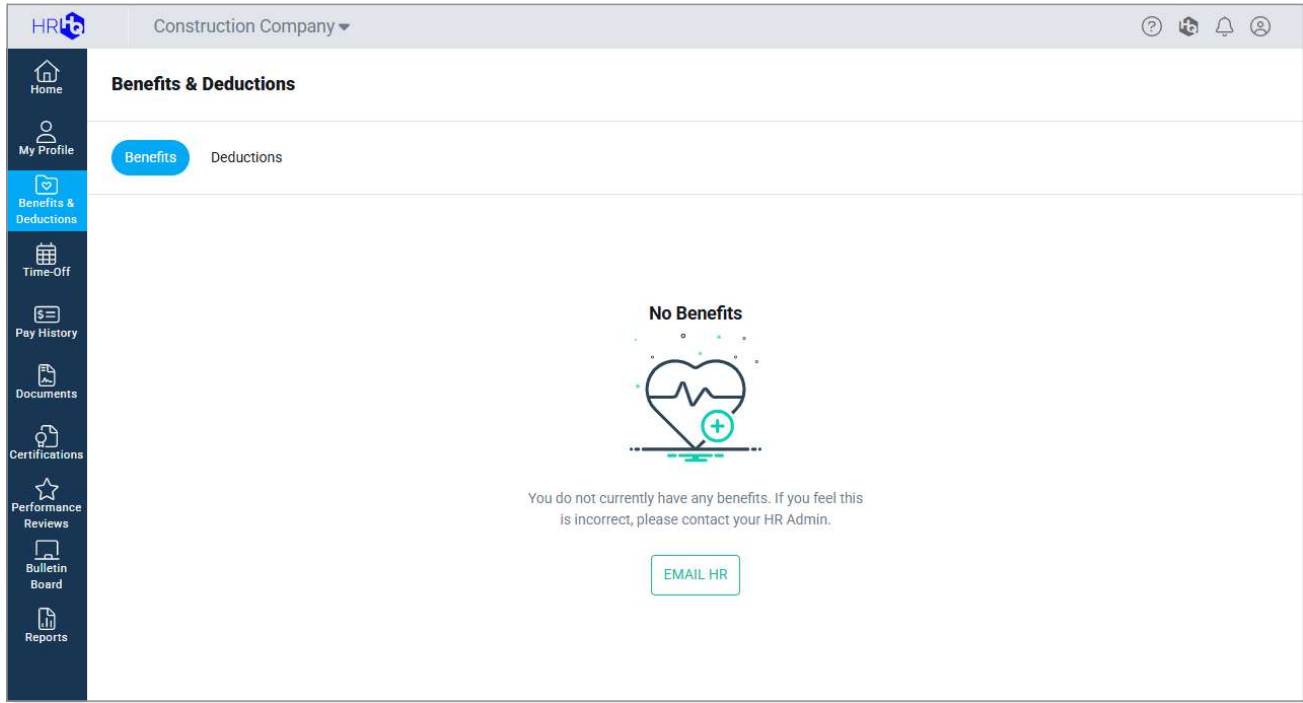
The screenshot shows the 'View Tax Withholding Information' window. The window title is 'View Tax Withholding Information'. It shows a table of 'W-4 Documents' with columns for 'Select', 'Name', and 'Upload Date'. The 'Uploaded' tab is selected. The first row is selected, and a red box highlights the 'Select' column. A red circle with the number '2' is in the top right corner. A red circle with the letter 'a' is above the 'Rendered' tab, and a red circle with the letter 'b' is above the 'Uploaded' tab. A red circle with the number '3' is next to the first row's 'Select' checkbox. A red circle with the number '4' is next to the 'VIEW' button at the bottom right.

Select	Name	Upload Date
<input checked="" type="checkbox"/>	Ohio-W-4-1694530074639.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694529447362.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="checkbox"/>	Ohio-W-4-1694207330547.pdf	09/12/2023

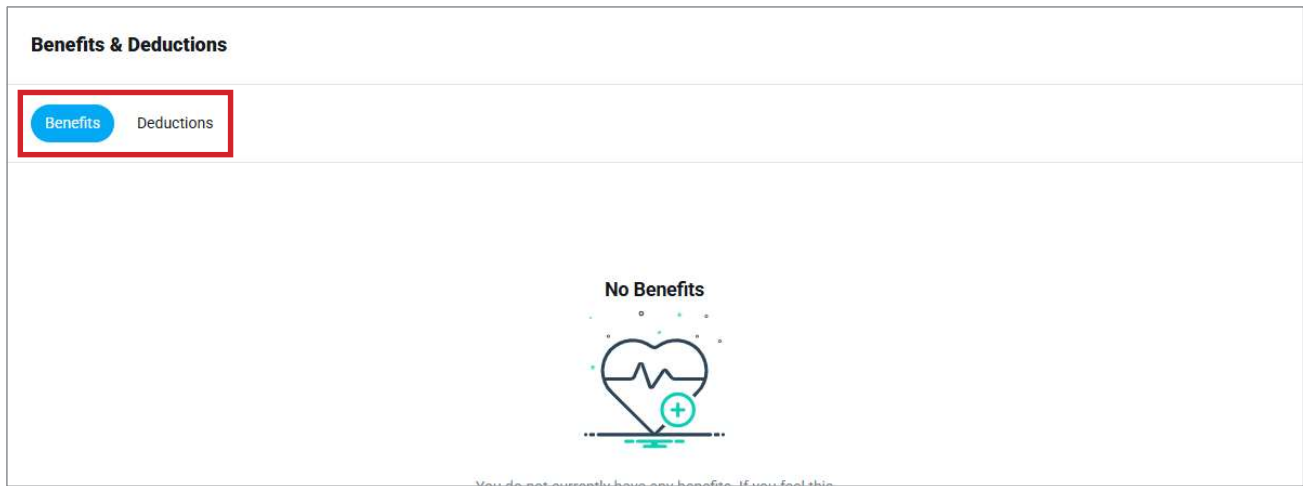
hrHQ BENEFITS & DEDUCTIONS

On the Benefits & Deduction screen, you can view the details of your individual benefit selections and payroll deductions.

Benefits and deductions are entered and maintained by your company's HR Department. If you have any questions about anything you see on this screen you can directly email your HR Department by selecting [CONTACT HR].



Select the "Benefits" and "Deductions" tabs at the top of the screen to navigate your records.



“BENEFITS” TAB

The “Benefits” tab displays the benefits you selected during your new employee onboarding or open enrollment period.

Each benefit is listed in a separate box. Each box displays your benefit name, plan name, and deduction amount per pay period.

The screenshot shows the "Benefits/Deductions" interface. At the top, there are two tabs: "Benefits" (selected) and "Deductions". Below the tabs, there are two benefit boxes. The first box is titled "401K - 401K DEDUCTION" and contains a pencil icon in the top right corner. It lists "Plan Name" as "401K Deduction" and "Deduction Amount" as "40%". The second box is titled "EDUCA - EDUCATION/TRAINING" and lists "Plan Name" as "Benefits" and "Deduction Amount" as "33%".

If you are enrolled in a 401K plan you can edit your 401K deductions here by selecting the pencil icon located in the upper-right corner of the 401K box.

This screenshot is identical to the previous one, but the pencil icon in the top right corner of the "401K - 401K DEDUCTION" box is highlighted with a red square, indicating that it is the element used to edit the deduction.

“DEDUCTIONS” TAB

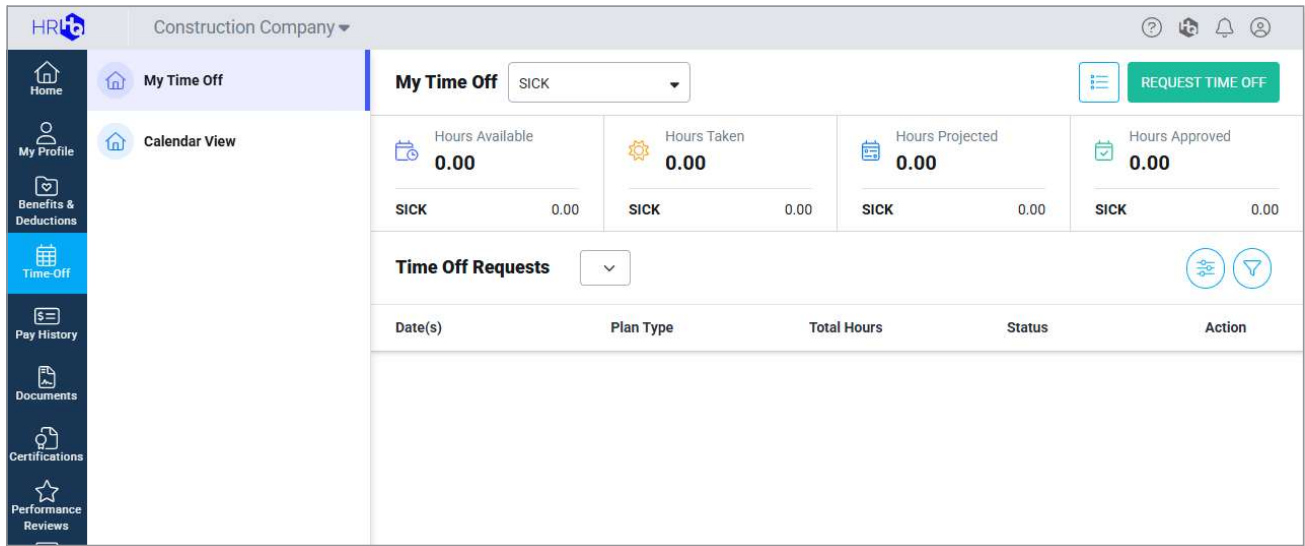
The “Deductions” tab displays your individual deductions.

Like in the Benefits view, each deduction is listed in a separate box. Each box displays your deduction name, plan name, and deduction amount per pay period.

The screenshot shows the "Benefits/Deductions" interface with the "Deductions" tab selected. There are two deduction boxes. The first box is titled "ADV1 - ADDITIONAL ADVANCE" and lists "Plan Name" as "ADV1 ADDITIONAL ADVANCE" and "Deduction Amount" as "\$25.00". The second box is titled "ADVAN - EMPLOYEE ADVANCE" and lists "Plan Name" as "ADVAN EMPLOYEE ADVANCE" and "Deduction Amount" as "\$70.00".

hrHQ TIME-OFF

On the Time-Off screen you can view and submit your time off requests.



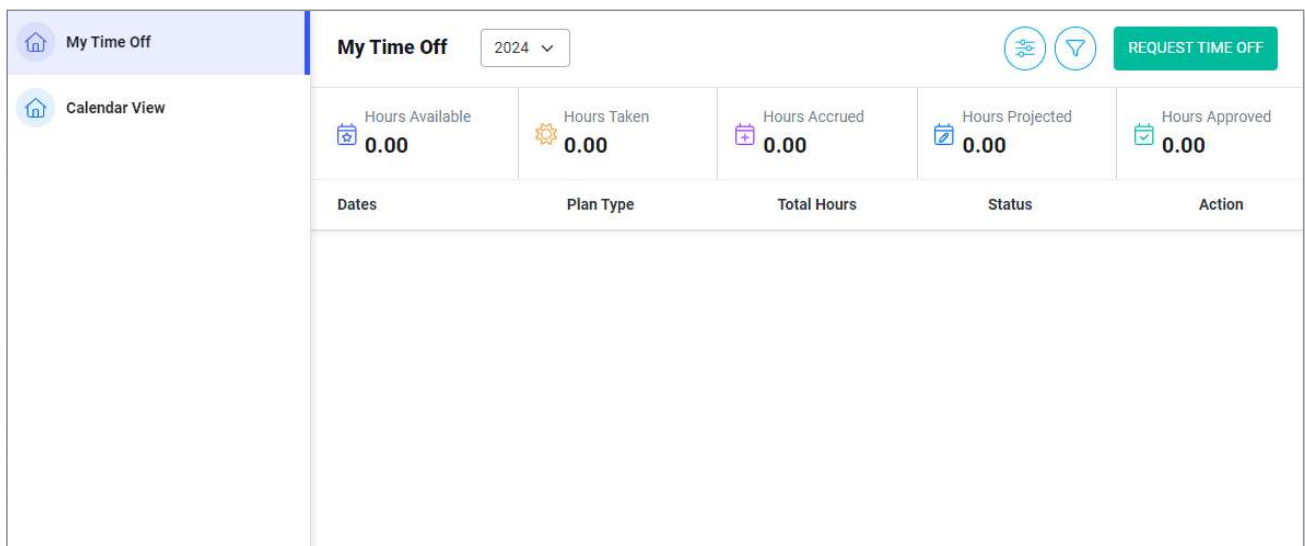
TIME OFF SCREEN VIEWS

You have two options for viewing the Time Off screen, the My Time Off (grid) view, and the Calendar view. Both views list your current hours available, hours taken, hours accrued, hours projected, and hours approved at the top of the screen. Use the side menu to navigate views.

My Time Off View

My Time Off view is the default screen for viewing and managing your time off requests.

Your approved and requested time off requests are presented in a grid view. Each individual request is represented in its own row with columns for *Dates*, *Plan Type*, *Total Hours*, and *Status*.



Changing My Time Off Year

The view defaults to the current calendar year. To change the year, select the year you want to view from the dropdown menu next to the *My Time Off* header.

The screenshot shows the 'My Time Off' interface. On the left, there is a sidebar with 'My Time Off' and 'Calendar View' options. The main area is titled 'My Time Off' and features a dropdown menu currently set to '2024'. To the right of the dropdown are two circular icons and a green 'REQUEST TIME OFF' button. Below this, there are five summary cards: 'Hours Available 0.00', 'Hours Taken 0.00', 'Hours Accrued 0.00', 'Hours Projected 0.00', and 'Hours Approved 0.00'. At the bottom, a table header is visible with columns: 'Dates', 'Plan Type', 'Total Hours', 'Status', and 'Action'.

Calendar View

The Calendar View displays your approved and requested time off, company events, and holidays on a calendar.

The screenshot shows the 'Calendar View' interface. The sidebar on the left has 'Calendar View' selected. The main area is titled 'Calendar View' and includes a 'REQUEST TIME OFF' button. Summary cards for 'Hours Available', 'Hours Taken', 'Hours Accrued', 'Hours Projected', and 'Hours Approved' are all at 0.00. Below these is a navigation bar with 'TODAY', navigation arrows, and the current month 'March, 2024', along with 'WEEK' and 'MONTH' view toggles. A 'FILTERS' section on the left includes:

- Approved Time Off
- Pending Time Off
- Events
- Holiday

 The calendar grid shows days from Sunday to Saturday. The dates 25, 26, 27, 28, 29, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, and 23 are visible. The background of the calendar cells is light green.

Calendar View Options

The Calendar View defaults to the month view, the current month, and with all the filters selected. You can adjust and customize your Calendar View.

Changing Calendar View Type

You can view the calendar in either the month view (default) or week view. Select the “Week” or “Month” tab in the upper-right corner of the calendar to change your view. Your selection is saved and the next time you access the Time Off Calendar View the system will remember your preference.

The screenshot shows the 'My Time Off' interface. On the left is a navigation menu with 'My Time Off' and 'Calendar View'. The main area is titled 'Calendar View' and includes a 'REQUEST TIME OFF' button. Below this are five summary cards: 'Hours Available 0.00', 'Hours Taken 0.00', 'Hours Accrued 0.00', 'Hours Projected 0.00', and 'Hours Approved 0.00'. A navigation bar shows 'TODAY', left and right arrow icons, and 'March, 2024'. To the right of the navigation bar are 'WEEK' and 'MONTH' tabs, with 'MONTH' selected. Below the navigation bar is a 'FILTERS' section with four checked items: 'Approved Time Off', 'Pending Time Off', 'Events', and 'Holiday'. The calendar grid shows dates from 25 to 9, with columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat.

Changing Calendar Date Range

The calendar defaults to the current week or month, depending on your saved view setting. You can use the arrow icons in the upper-left corner of the calendar to navigate to a different day, week, or month.

This screenshot is identical to the previous one, but with a red box highlighting the left and right arrow icons in the navigation bar, indicating how to change the date range.

Note: This change is temporary and the next time you view the calendar it will revert to the current month or week.

Changing Calendar Filters

Calendar filters are listed on the left side of the calendar. All filters are selected by default.

Filters options are:

- Approved Time Off — Your approved time off requests.
- Pending Time Off — Your submitted time off requests.
- Events — Events created by your company's HR Department.
- Holiday — Company holidays.

To remove a filter, clear the checkbox next to the filter name. To reapply a filter, select the checkbox next to the filter name.

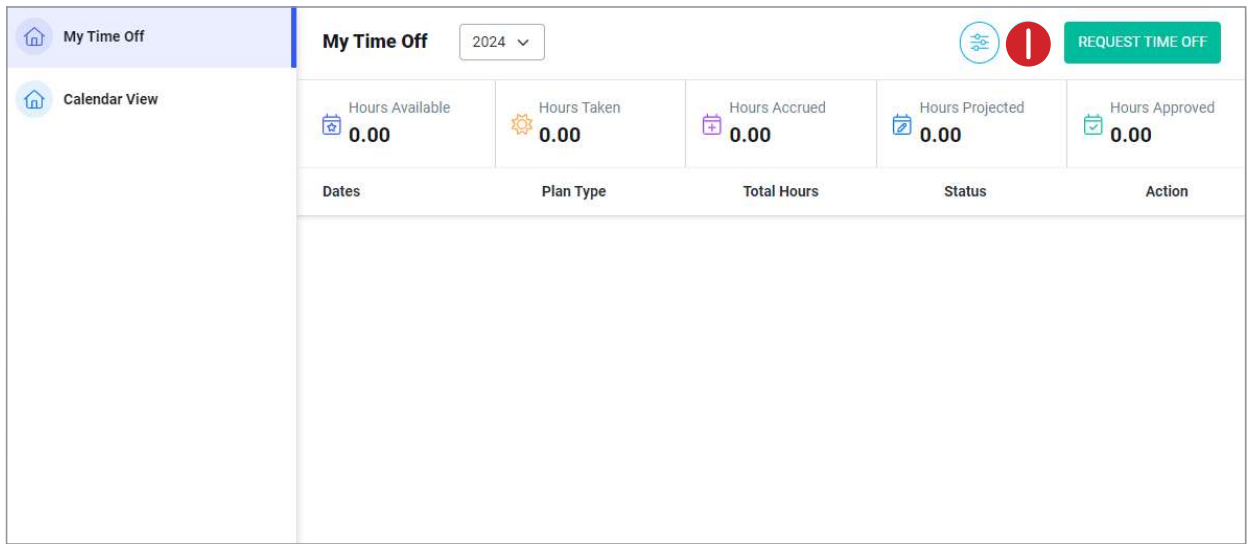
The screenshot displays the 'Calendar View' interface. On the left, a sidebar contains 'My Time Off' and 'Calendar View'. The main area shows a summary of time off metrics: Hours Available (0.00), Hours Taken (0.00), Hours Accrued (0.00), Hours Projected (0.00), and Hours Approved (0.00). Below this is a navigation bar with 'TODAY', navigation arrows, 'March, 2024', and 'WEEK/MONTH' view toggles. A 'FILTERS' panel on the left, highlighted with a red box, lists four filters: 'Approved Time Off' (checked), 'Pending Time Off' (checked), 'Events' (checked), and 'Holiday' (checked). The main calendar grid shows dates from Sunday 25 to Saturday 9.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	1	2
3	4	5	6	7	8	9

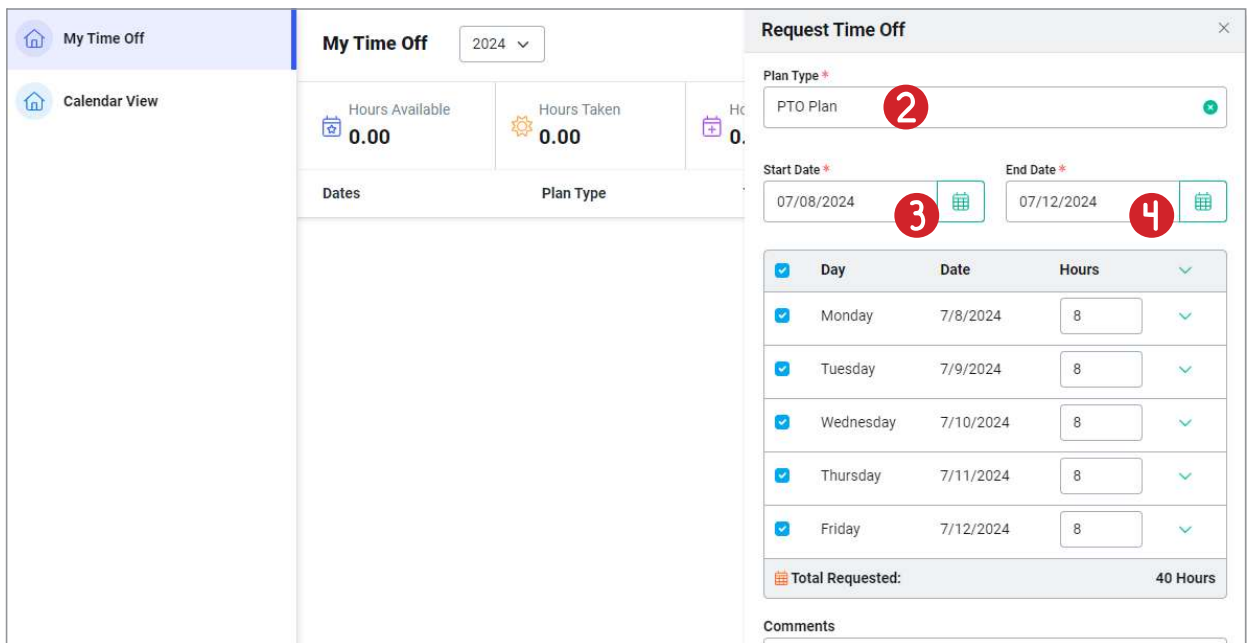
REQUESTING TIME OFF

You can submit a request for time off on either Time-Off screen views.

1. Click on [REQUEST TIME OFF] in the upper-right corner of the screen. The Request Time Off pane opens.



2. In the *Plan Type* dropdown menu, select the appropriate time off plan.
3. In the *Start Date* field, enter the start date.
4. In the *End Date* field, enter the end date. A line for each day in the start and end range appears.



- Each day in the start and end range defaults to eight hours per day. Adjust the days and hours requested if needed:
 - To remove a day from the range, clear the checkbox before the day you want to remove.

The screenshot shows the 'Request Time Off' form for the year 2024. The 'Plan Type' is 'PTO Plan'. The start date is 07/08/2024 and the end date is 07/12/2024. The table below shows the days and hours requested:

Day	Date	Hours	
<input checked="" type="checkbox"/>	Monday	7/8/2024	8
<input checked="" type="checkbox"/>	Tuesday	7/9/2024	8
<input type="checkbox"/>	Wednesday	7/10/2024	
<input checked="" type="checkbox"/>	Thursday	7/11/2024	8
<input checked="" type="checkbox"/>	Friday	7/12/2024	8
Total Requested:		32 Hours	

- To change the hours requested for a day, select the expand icon next to the day and update your start and end time.

The screenshot shows the 'Request Time Off' form for the year 2024. The 'Plan Type' is 'PTO Plan'. The start date is 07/08/2024 and the end date is 07/12/2024. The table below shows the days and hours requested:

Day	Date	Hours	
<input checked="" type="checkbox"/>	Monday	7/8/2024	8
<input checked="" type="checkbox"/>	Tuesday	7/9/2024	4
		12:00 PM	04:00 PM
<input type="checkbox"/>	Wednesday	7/10/2024	
<input checked="" type="checkbox"/>	Thursday	7/11/2024	8
<input checked="" type="checkbox"/>	Friday	7/12/2024	8
Total Requested:		28 Hours	

- In the *Comments* field, enter all comments you want to include with your request.
- Review the details of your request. If correct, select [SUBMIT].

Day	Date	Hours
<input checked="" type="checkbox"/>	Monday 7/8/2024	8
<input checked="" type="checkbox"/>	Tuesday 7/9/2024	4
<input type="checkbox"/>	Wednesday 7/10/2024	
<input checked="" type="checkbox"/>	Thursday 7/11/2024	8
<input checked="" type="checkbox"/>	Friday 7/12/2024	8

Total Requested: 28 Hours

Comments: 6

CLEAR CANCEL SUBMIT

Note: If your requested hours exceed your available hours a pop-up message appears. Select [CANCEL] to cancel, or the [SUBMIT] to submit the request.

- A dialog box opens asking you to confirm. Select [Submit].

Submit Time Off Request

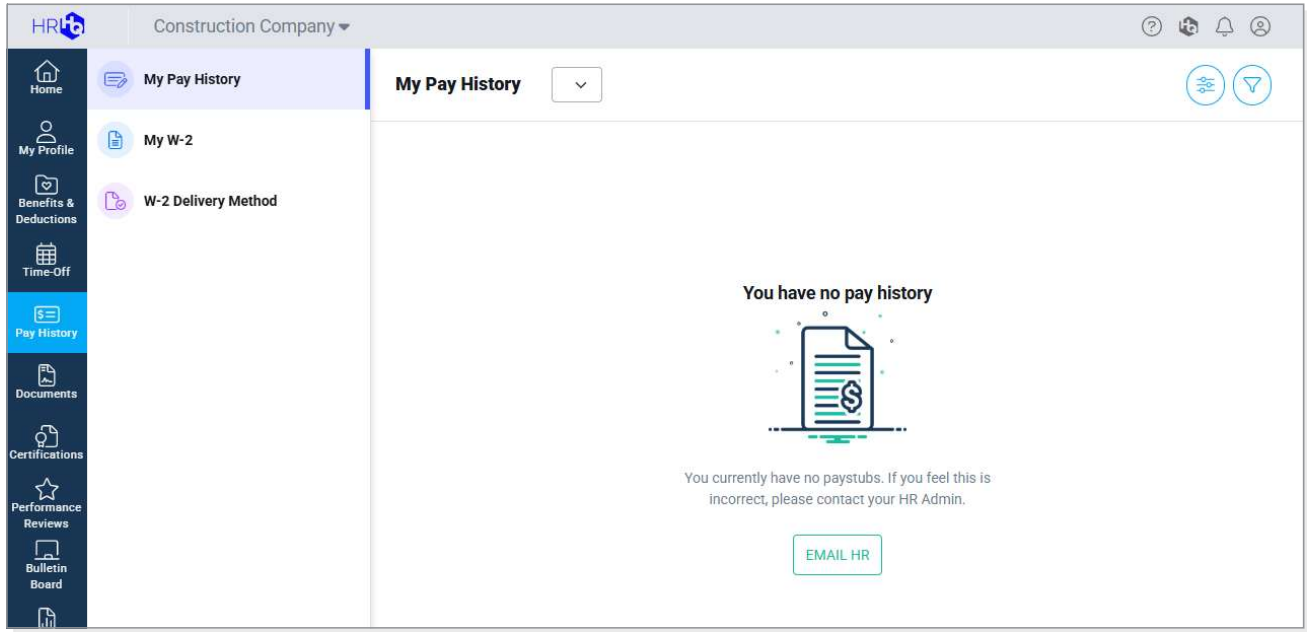
Do you want to submit this request?

CANCEL SUBMIT

Once submitted, your new time off request will appear as pending until it is approved by your manager.

hrHQ PAY HISTORY

On the Pay History screen you can view your pay history and W-2, and to update your W-2 delivery method. You can use the side menu to navigate to the Pay History settings you want to view or change.

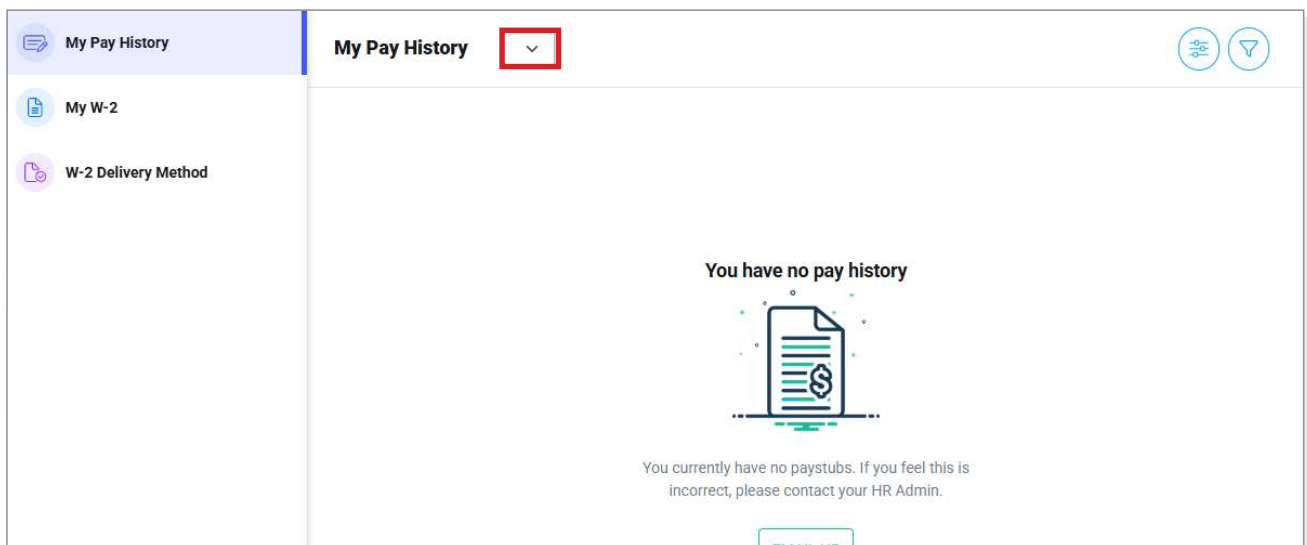


MY PAY HISTORY

The Pay History screen displays your pay history. Pay stubs are listed by pay period, per year.

Changing Pay History Year

To change the year, select the year you want to view from the dropdown menu.

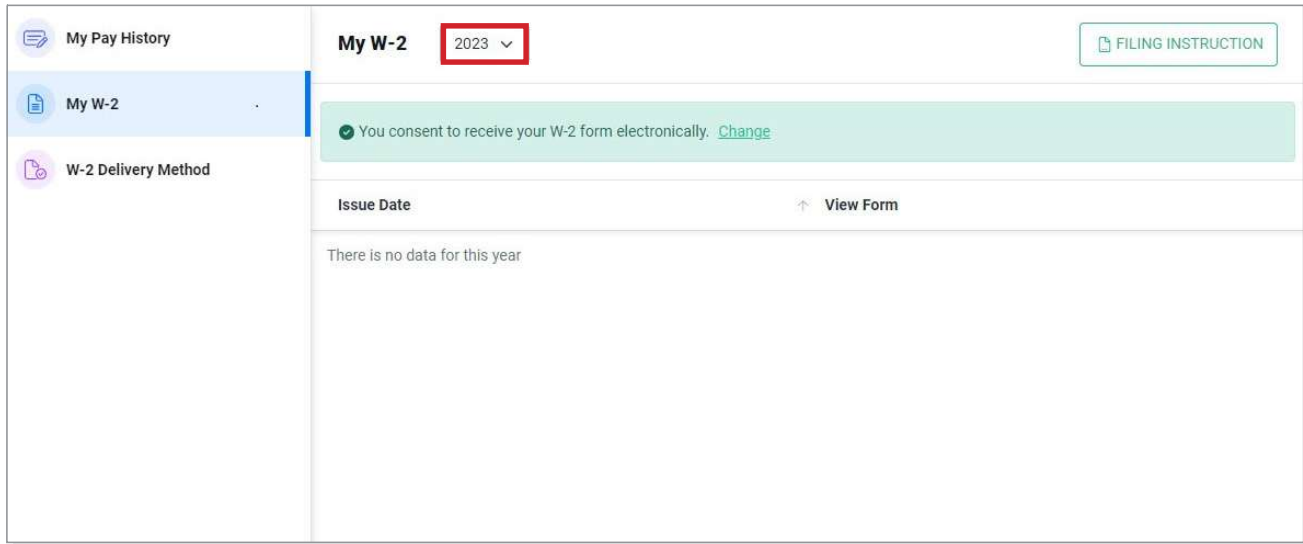


MY W-2

The My W-2 screen displays your W-2 documents. You must consent to receive your W-2 form electronically to view your W-2 forms on this screen. W-2 forms are listed by year.

Changing W-2 Year

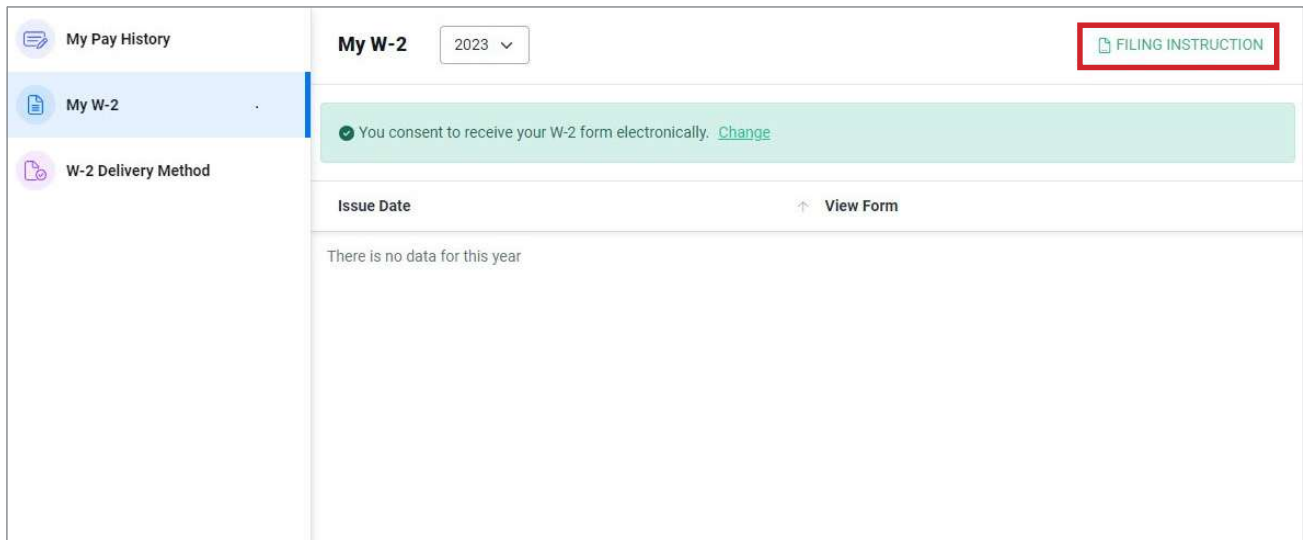
To change the year, select the year you want to view from the dropdown menu.



The screenshot shows the 'My W-2' section of a web application. On the left is a navigation menu with three items: 'My Pay History', 'My W-2', and 'W-2 Delivery Method'. The 'My W-2' item is selected. The main content area has a header with 'My W-2' and a dropdown menu currently set to '2023'. To the right of the dropdown is a button labeled 'FILING INSTRUCTION'. Below the header is a green banner with a checkmark and the text 'You consent to receive your W-2 form electronically. [Change](#)'. Underneath is a table with a header row containing 'Issue Date' and 'View Form'. The table body contains the text 'There is no data for this year'.

Viewing W-2 Filing Instructions

To view W-2 form filing instructions, select [FILING INSTRUCTION] in the upper-right corner of the page. This opens a new window to the IRS website.

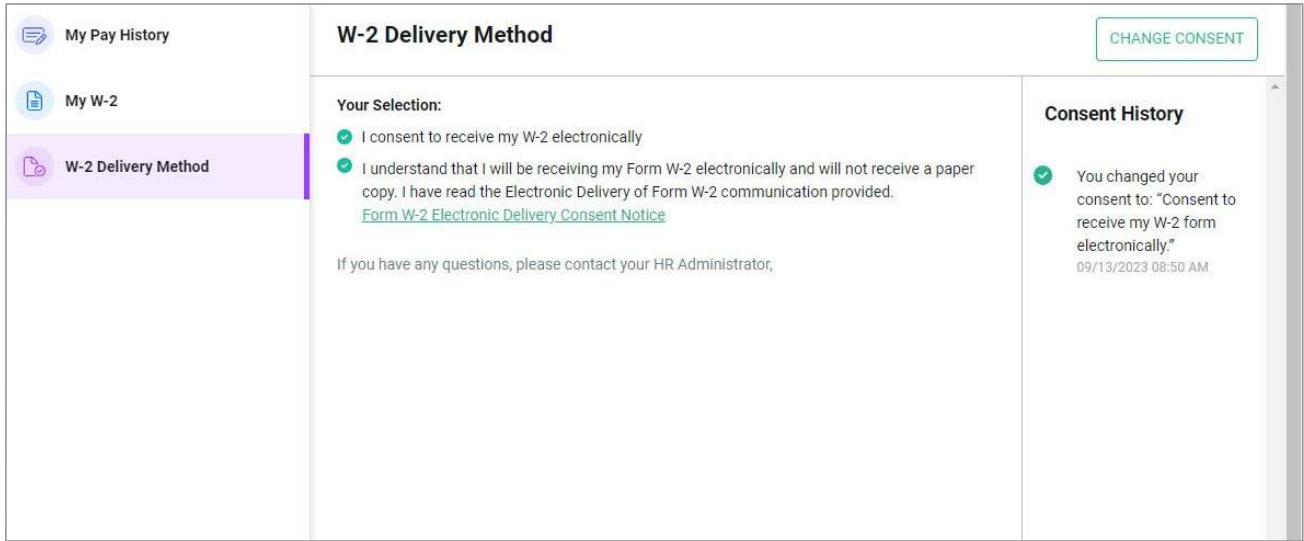


This screenshot is identical to the one above, but with a red rectangular box highlighting the 'FILING INSTRUCTION' button in the upper right corner of the main content area.

W-2 DELIVERY METHOD

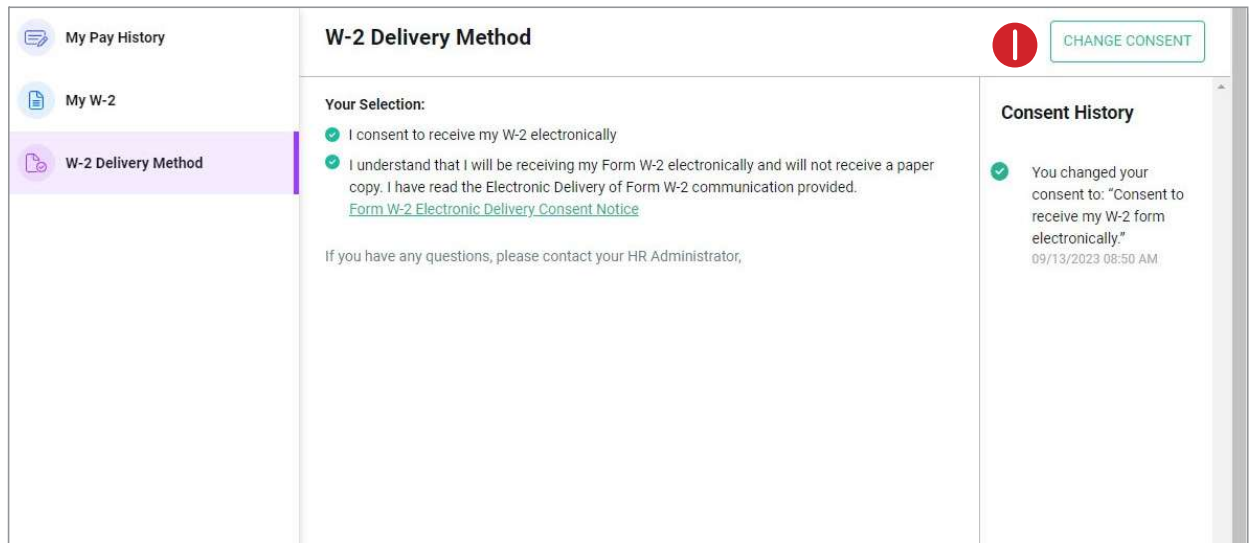
The W-2 Delivery Method screen is where you select how you want to receive your W-2 form.

The *Your Selection* section on the left side of the screen displays your current W-2 selection. The “Consent History” displays your consent updates by consent selection and date.



Changing W-2 Consent

1. Select [CHANGE CONSENT] in the upper-right corner of the screen. The Update W-2 Delivery Method screen opens.



2. Update your consent selection.

Note: If you select “I consent to receive my W-2 electronically” you must also select the *I understand...* checkbox directly below it.

3. Select [UPDATE] in the upper-right corner of the screen.

Update W-2 Delivery Method

My Pay History
My W-2
W-2 Delivery Method

UPDATE

Your Selection:

- I consent to receive my W-2 form electronically.
- I DO NOT consent to receive my W-2 form electronically.

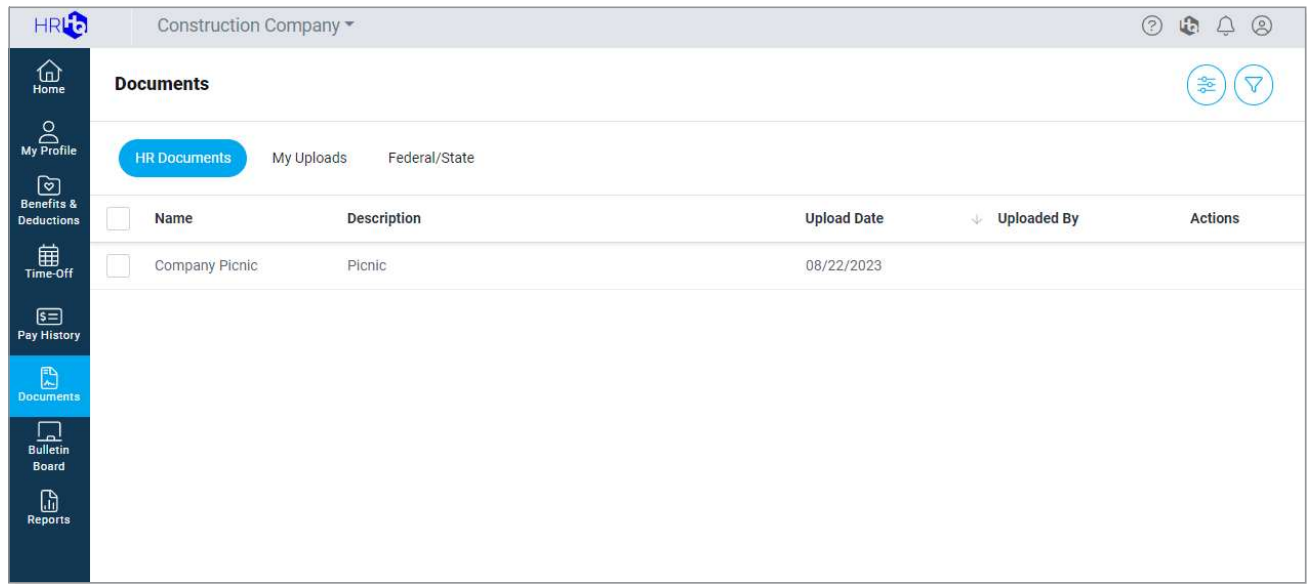
Consent History

- ✓ You changed your consent to: "Consent to receive my W-2 form electronically." 09/13/2023 08:50 AM

hrHQ DOCUMENTS

On the Documents screen you can view and download copies of your employee documents.

Select the “HR Documents,” “My Uploads,” and “Federal/State” tabs at the top of the screen to navigate your records.

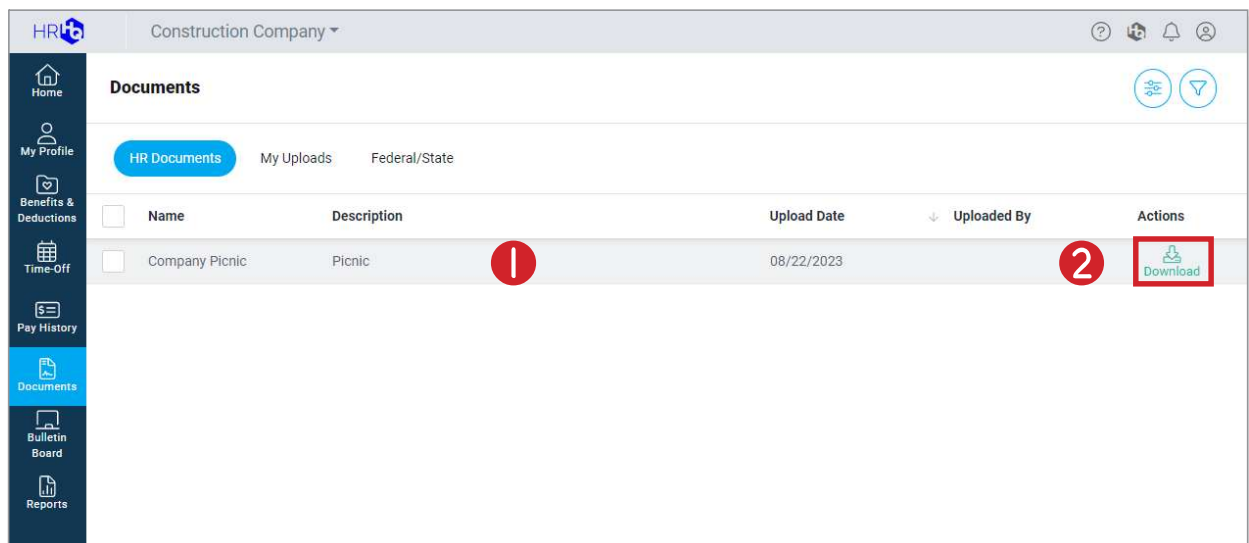


DOWNLOADING DOCUMENTS

Documents in the “HR Documents” and “My Uploads” tabs can be downloaded.

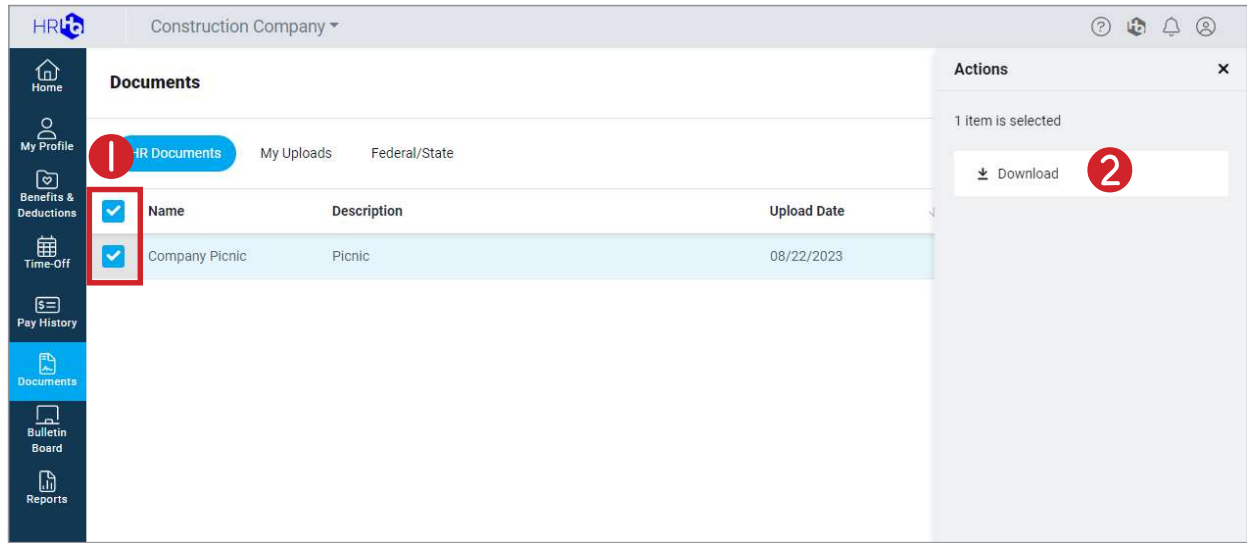
Downloading a Single Document

1. Hover over the document you want to download. Additional options appear in the *Actions* column.
2. Select [Download]. Your document downloads to your local drive.



Downloading Multiple Documents

1. Select the checkbox next to the documents you want to download. The Actions pane opens on the right-side of the screen.
2. Select [Download]. Your documents download to your local drive.



DOCUMENT TABS

“HR Documents” Tab

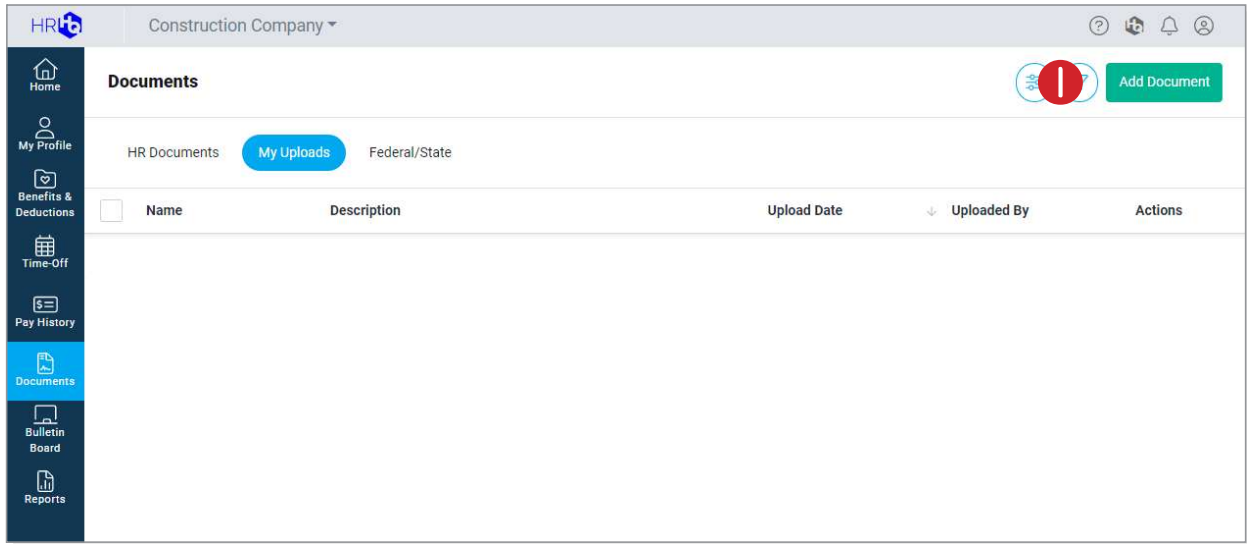
The “HR Documents” tab displays documents uploaded by your HR Department.

“My Uploads” Tab

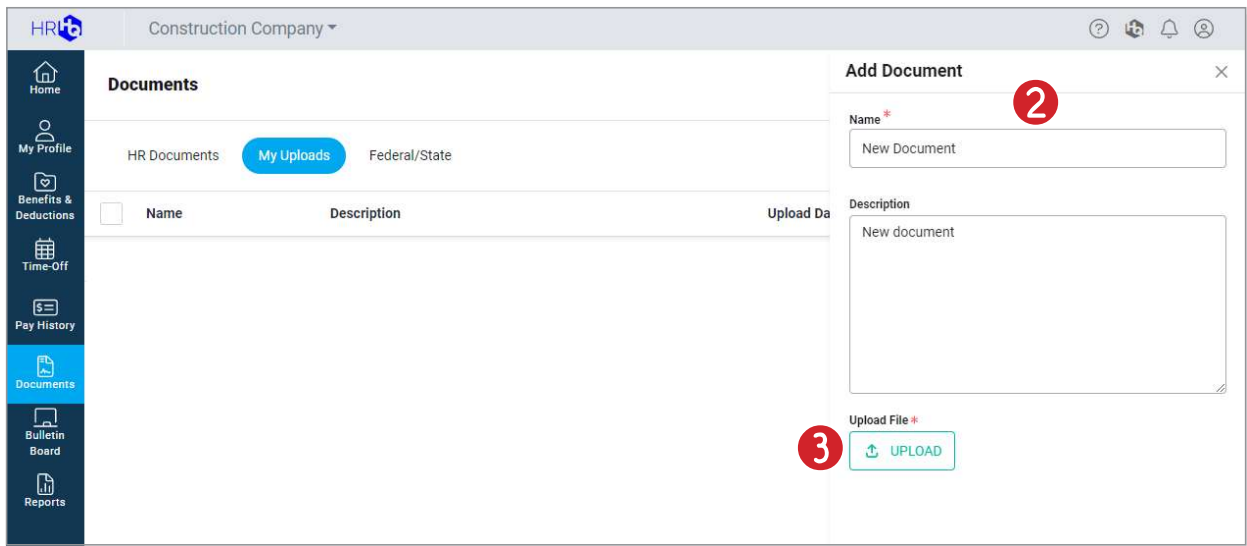
The “My Uploads” tab is where you can upload additional documents to your hrHQ account.

Uploading Records

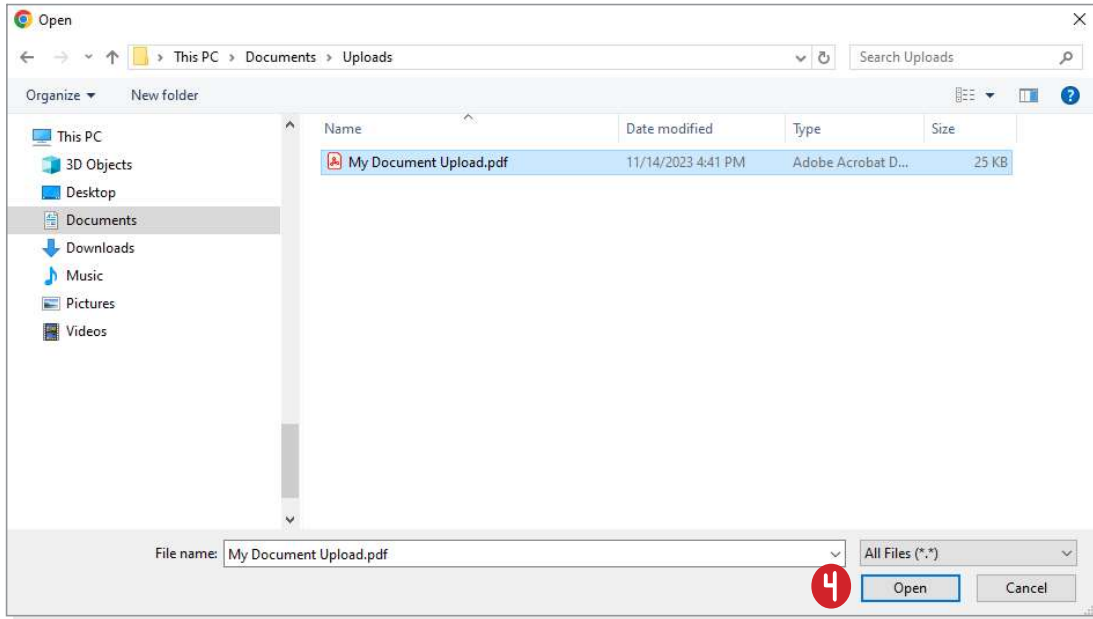
1. Select [ADD DOCUMENT] in the upper-right corner of the screen. The Add Document pane opens on the right side of the screen,



2. Complete all required fields.
3. Select [UPLOAD].

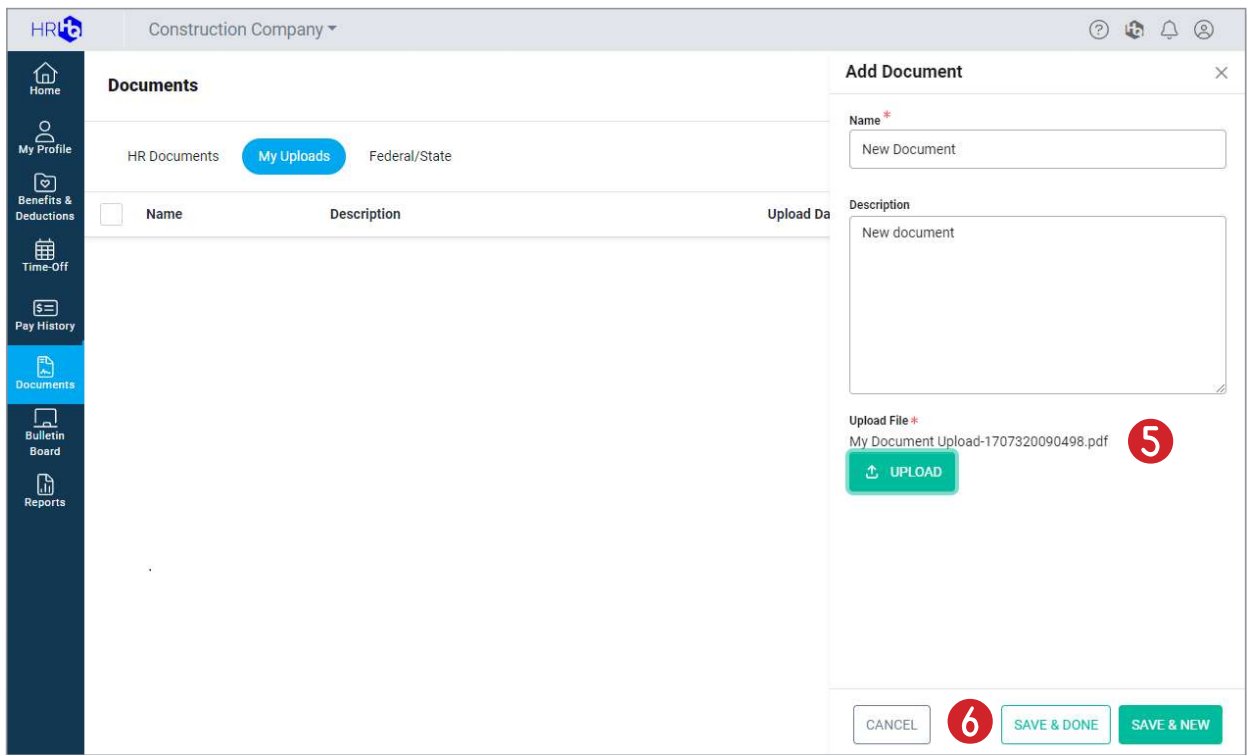


4. The Open dialog box opens. Locate your document and select [Open].



5. Confirm your document is attached.

6. Select [SAVE & DONE].

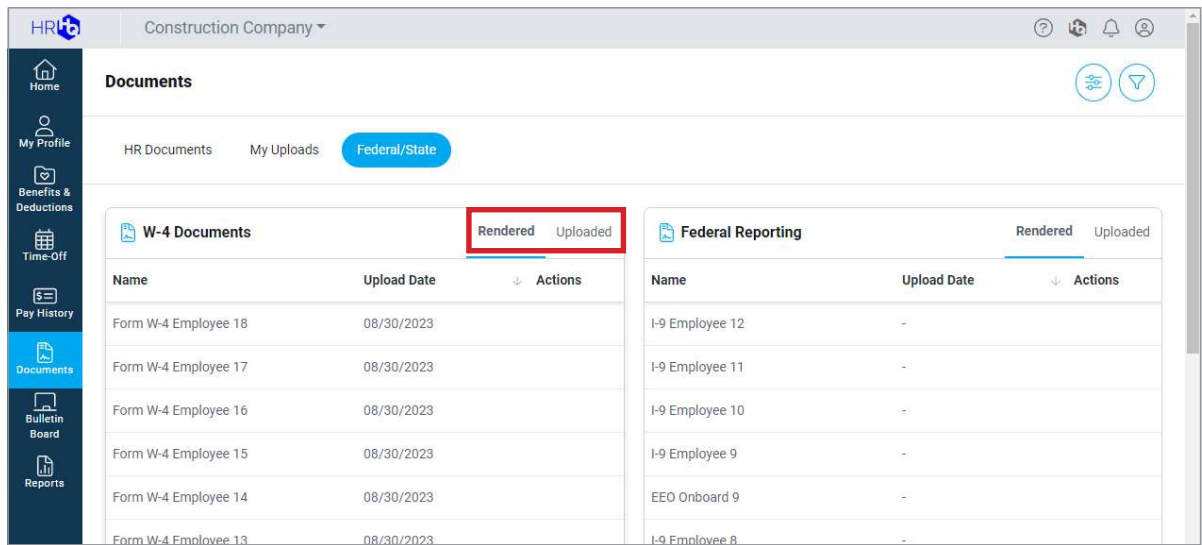


“Federal/State” Tab

The “Federal/State” tab contains your federal and state documents.

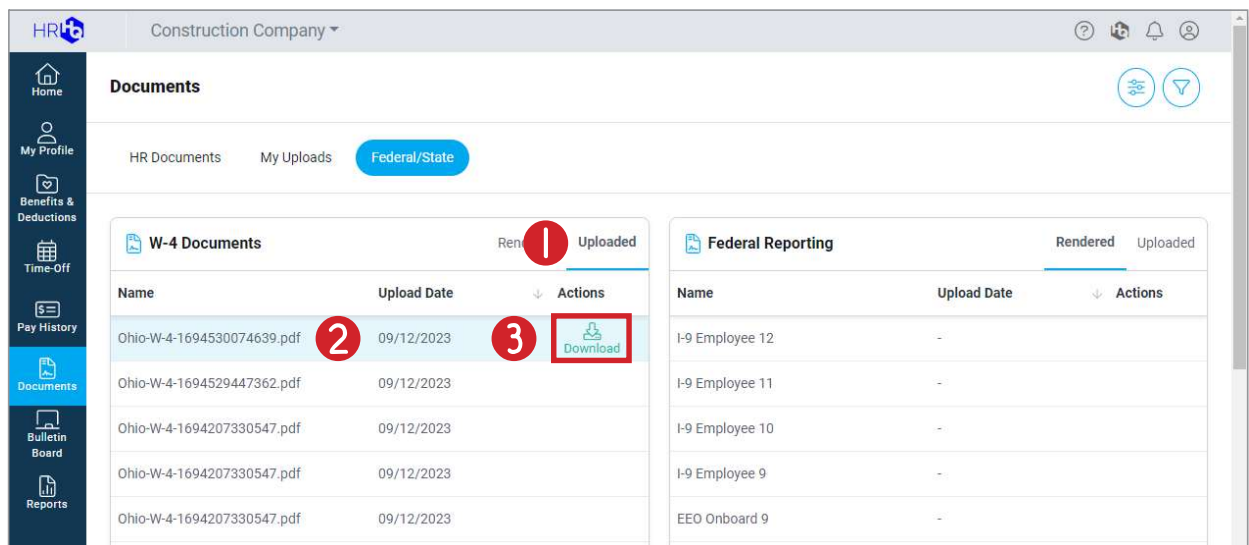
Each document type is organized in its own box. Each box contains two tabs, located in the upper-right corner of the section.

- The “Rendered” tab contains documents completed in hrHQ and rendered into the state or federal form.
- The “Uploaded” tab contains documents completed in the original PDF format.



Downloading Federal/State Documents

1. In the form section from where you want to download, go the “Uploaded” tab.
2. Click on the document want to download. Additional options appear in the *Actions* column
3. Select [Download]. Your document downloads to your local drive.



hrHQ PERFORMANCE REVIEWS

On the Performance Reviews screen you can view and complete your reviews, goals, and 360 degree feedback.

You can use the side menu to navigate to the Performance Reviews screen you want to view.

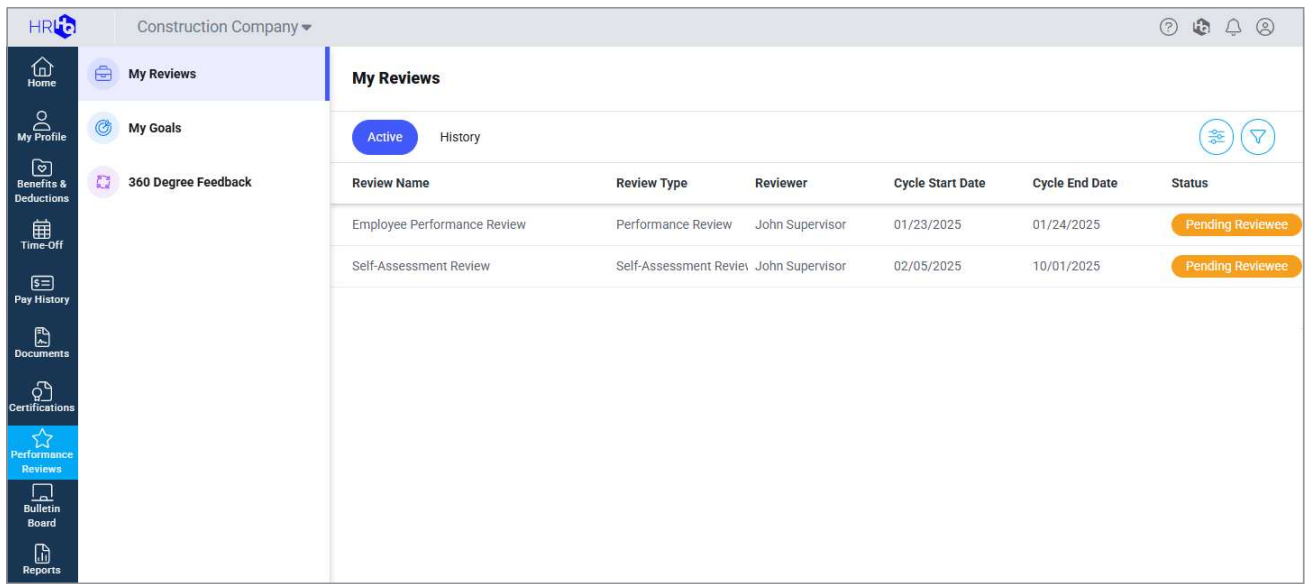
MY REVIEWS

The My Reviews screen is the default view in Performance Reviews. This screen displays your current and past reviews.

Reviews available on this screen are:

- Performance Review — An assessment of your performance.
- Project Review — An assessment of your performance within a specific project.
- Self-Assessment Review — A self-assessment of your performance.

Select the “Active” and “History” tabs at the top of the screen to navigate your reviews.



“Active” Tab

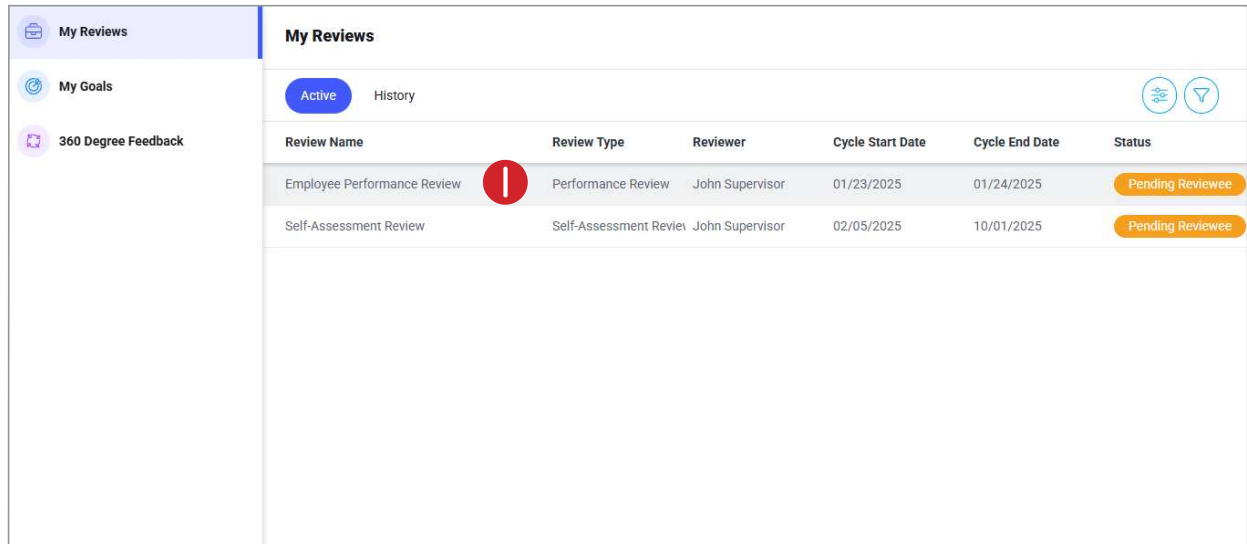
The “Active” tab displays your current reviews.

You must complete any review with a status of “Pending Reviewee.”

Completing Performance and Project Reviews

Note: You may not see all of the sections and fields reviewed in these steps. Review settings are determined by your company and can vary from review to review.

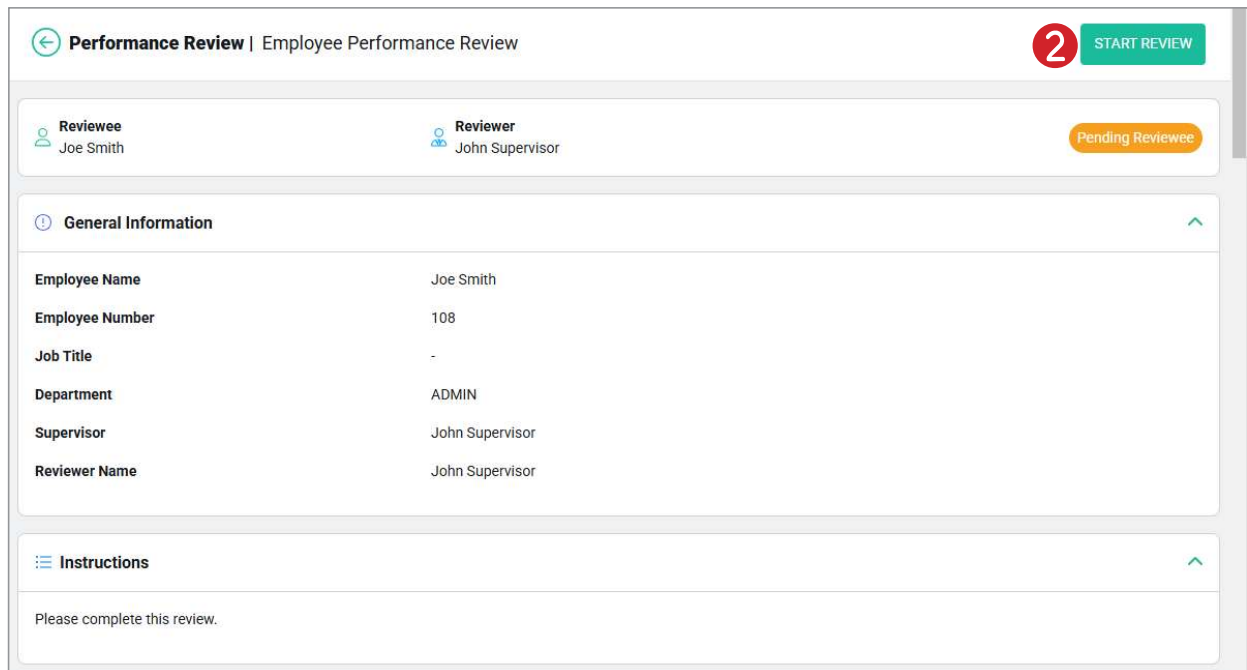
1. Select the performance or project review you want to complete.



The screenshot shows the 'My Reviews' dashboard. On the left is a sidebar with 'My Reviews' selected, and below it are 'My Goals' and '360 Degree Feedback'. The main area is titled 'My Reviews' and has tabs for 'Active' and 'History'. A table lists two reviews:

Review Name	Review Type	Reviewer	Cycle Start Date	Cycle End Date	Status
Employee Performance Review	Performance Review	John Supervisor	01/23/2025	01/24/2025	Pending Reviewee
Self-Assessment Review	Self-Assessment Review	John Supervisor	02/05/2025	10/01/2025	Pending Reviewee

2. In the upper-right corner of the screen, select [START REVIEW].



The screenshot shows the 'Performance Review' detail page for 'Employee Performance Review'. At the top right, there is a red circle with the number '2' and a green 'START REVIEW' button. Below this, the 'Reviewee' is Joe Smith and the 'Reviewer' is John Supervisor, with a 'Pending Reviewee' status. The 'General Information' section contains the following details:

Employee Name	Joe Smith
Employee Number	108
Job Title	-
Department	ADMIN
Supervisor	John Supervisor
Reviewer Name	John Supervisor

The 'Instructions' section contains the text: 'Please complete this review.'

3. In the *Instructions* section, review the instructions.

The screenshot shows the 'Performance Review' form for 'Employee Performance Review'. At the top right are buttons for 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The 'General Information' section contains the following data:

Employee Name	Joe Smith
Employee Number	108
Job Title	-
Department	ADMIN
Supervisor	John Supervisor
Reviewer Name	John Supervisor

The 'Instructions' section, marked with a red circle '3', contains the text: 'Please complete this review.'

4. In the *Review Questions* section, review your performance assessment. This section may include a rating scale, comments, or both. If applicable, add any comments you want to include in the *Reviewee Note* field(s).

The screenshot shows the 'Performance Review' form for 'Employee Performance Review'. At the top right are buttons for 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The 'Review Questions' section, marked with a red circle '4', contains the following content:

Communication

Demonstrates follow-up to ensure task is understood.

1 - Unsatisfactory 2 - Needs Improvement 3 - Satisfactory 4 - Above Average 5 - Excellent

Reviewer Note
Keep up the good work!

Reviewee Note
Thank you!

5. In the *Documents* section, review any attached documents. If you want to attach any documents to the review, select the [UPLOAD DOCUMENT] button at the bottom of the section.
6. In the *Goals* section, review your goals.
7. In the *General Comments* section, review any comments left by your supervisor. Add any comments you want to include in the *Reviewee Comment* field.

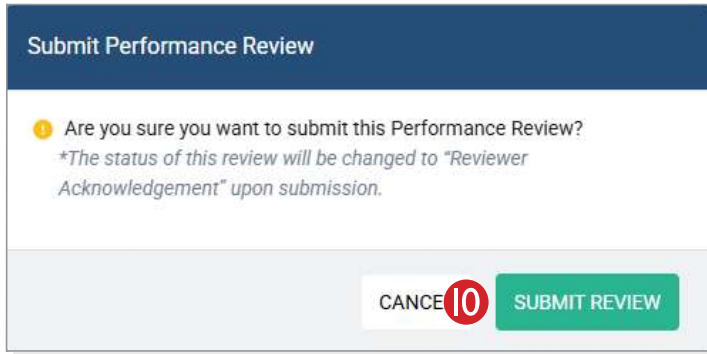
The screenshot shows the 'Performance Review' form for an 'Employee Performance Review'. At the top right, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The form is divided into three main sections:

- Documents (5):** This section has a red circle with the number '5' next to the title. It contains a folder icon and the text 'No Documents attached.' Below this is a green button labeled 'UPLOAD DOCUMENT'.
- Goals (6):** This section has a red circle with the number '6' next to the title. It contains the text 'N/A.'.
- General Comments (7):** This section has a red circle with the number '7' next to the title. It contains a 'Reviewer Comment' with the text 'Great job!' and a 'Reviewee Comment' field which is currently empty.

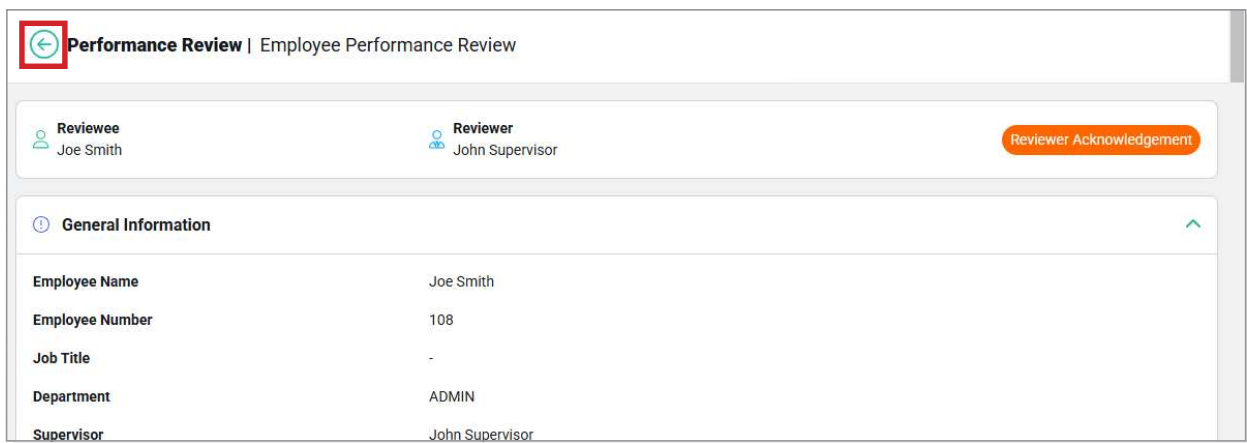
8. In the *Acknowledgment* section, use your mouse, penpad, or touchpad to sign your name.
9. Select [SUBMIT REVIEW].

The screenshot shows the 'Performance Review' form for an 'Employee Performance Review'. At the top right, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The 'FINISH LATER' button has a red circle with the number '9' next to it. The form is divided into one main section:- Acknowledgement (8):** This section has a red circle with the number '8' next to the title. It contains the text 'Please acknowledge this review.' Below this is an orange warning box with a red 'x' icon and the text 'Your signature is only saved after you submit the review.' Underneath is a 'Reviewee Signature' section with a checked checkbox and the text 'I agree that my signature below is an electronic signature and has the same effect as my written signature. Uncheck this box if you do not agree to provide an electronic signature.' Below the checkbox is a large text area containing a handwritten signature. At the bottom left, there are two buttons: '02/03/2025' and '05:03 PM'.

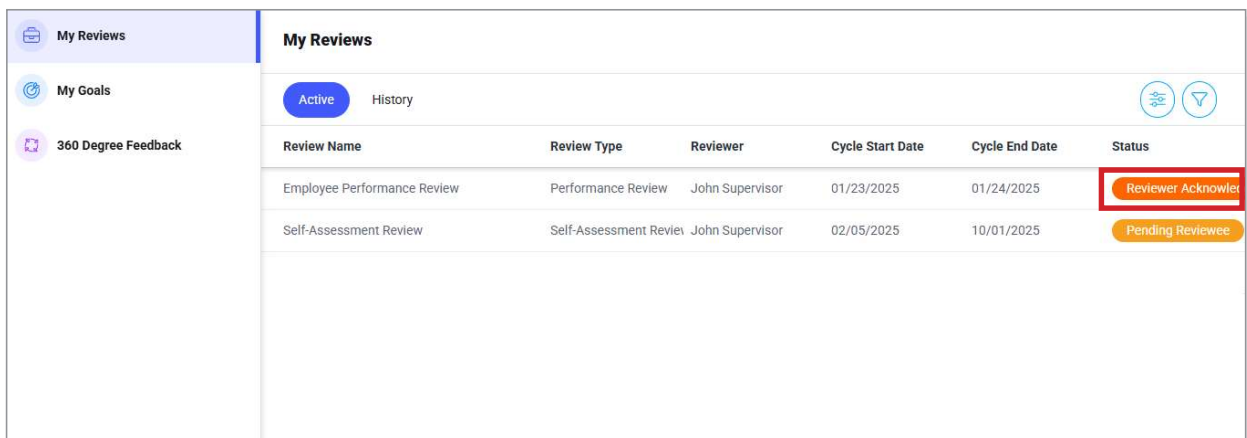
10. The Submit Performance Review dialog box opens. Select [SUBMIT REVIEW].



The Review screen refreshes and displays the updated status. Select the back arrow in the upper-left corner of the screen to return to the My Reviews screen.



The review appears in the "Active" tab with a status of "Reviewer Acknowledgment" until it is approved by your supervisor.

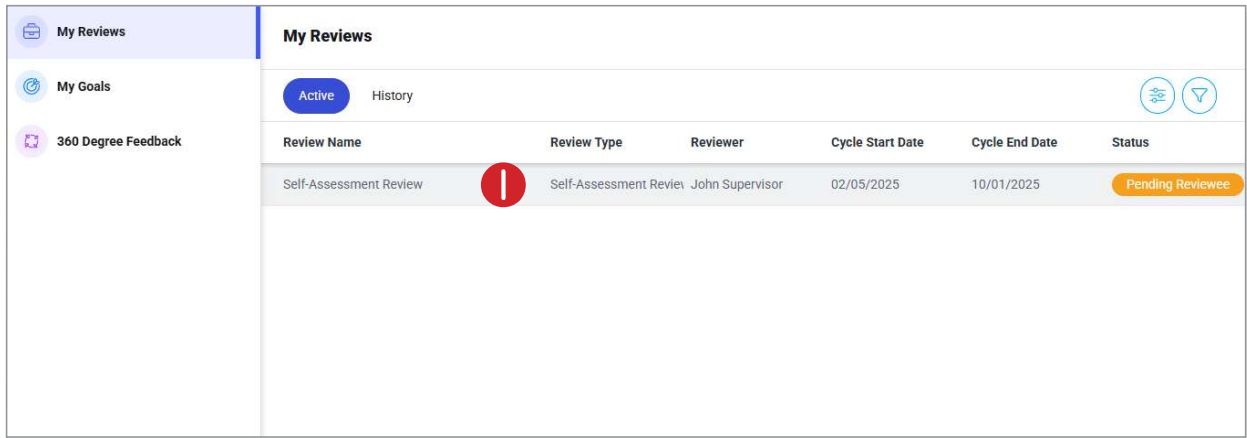


If your supervisor rejects the review, the status changes to "Pending Reviewee" and you must repeat these steps.

Completing Self-Assessment Reviews

Note: You may not see all of the sections and fields reviewed in these steps. Review settings are determined by your company and can vary from review to review.

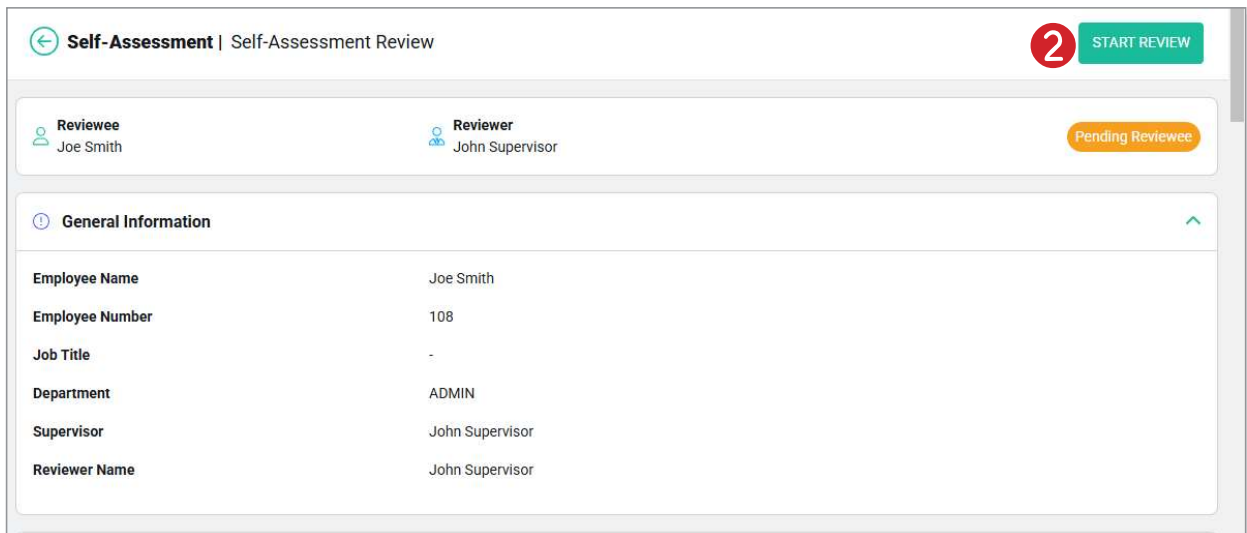
1. Select the self-assessment review you want to complete.



The screenshot shows the 'My Reviews' dashboard. On the left is a sidebar with 'My Reviews' (selected), 'My Goals', and '360 Degree Feedback'. The main area has tabs for 'Active' and 'History'. Below the tabs is a table with the following data:

Review Name	Review Type	Reviewer	Cycle Start Date	Cycle End Date	Status
Self-Assessment Review	Self-Assessment Review	John Supervisor	02/05/2025	10/01/2025	Pending Reviewee

2. In the upper-right corner of the screen, select [START REVIEW].



The screenshot shows the 'Self-Assessment Review' detail page. At the top right, a green 'START REVIEW' button is highlighted with a red circle and the number '2'. Below the header, the 'Reviewee' is Joe Smith and the 'Reviewer' is John Supervisor. A 'Pending Reviewee' status is shown. The 'General Information' section contains the following details:

Employee Name	Joe Smith
Employee Number	108
Job Title	-
Department	ADMIN
Supervisor	John Supervisor
Reviewer Name	John Supervisor

3. In the *Instructions* section, review the instructions.

Self-Assessment | Self-Assessment Review CANCEL FINISH LATER SUBMIT REVIEW

Reviewee Joe Smith **Reviewer** John Supervisor Pending Reviewee

General Information

Employee Name	Joe Smith
Employee Number	108
Job Title	-
Department	ADMIN
Supervisor	John Supervisor
Reviewer Name	John Supervisor

Instructions 3

Reviewee: Please rate each question accordingly and enter any comments you may have for each category. Each question requires a rating. Comments are optional.

Reviewer: Please enter any comments you may have for the reviewee for each category. Comments are optional.

4. In the *Review Questions* section, rate your performance. This section may include rating scale questions, comments, or both.

Self-Assessment | Self-Assessment Review CANCEL FINISH LATER SUBMIT REVIEW

Review Questions 4

Communication

Communicates effectively with customers and team.

1 - Unsatisfactory 2 - Needs Improvement 3 - Satisfactory 4 - Above Average 5 - Excellent

Reviewee Note
Calls and emails clients to inform them of project status and updates. Weekly status meetings with team.

Reviewer Note
-

- In the *Documents* section, select the [UPLOAD DOCUMENT] button to upload any documents you want to attach.
- In the *General Comments* section, enter any general comments.

The screenshot shows the 'Self-Assessment | Self-Assessment Review' interface. At the top right, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The main content is divided into two sections:

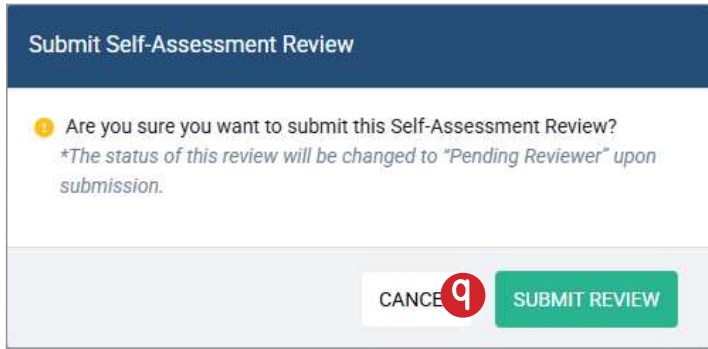
- Documents (5):** A table with columns 'Name', 'Description', and 'Actions'. The first row contains 'Status Reports' with a '-' in the description and 'Download' and 'Delete' icons in the actions. Below the table is an 'UPLOAD DOCUMENT' button.
- General Comments (6):** A section with two sub-sections: 'Reviewee Comment' and 'Reviewer Comment'. The 'Reviewee Comment' field contains 'N/A.' and has a text area with a signature icon at the bottom right. The 'Reviewer Comment' field is currently empty.

- In the *Acknowledgment* section, use your mouse, penpad, or touchpad to sign your name.
- Select [SUBMIT REVIEW].

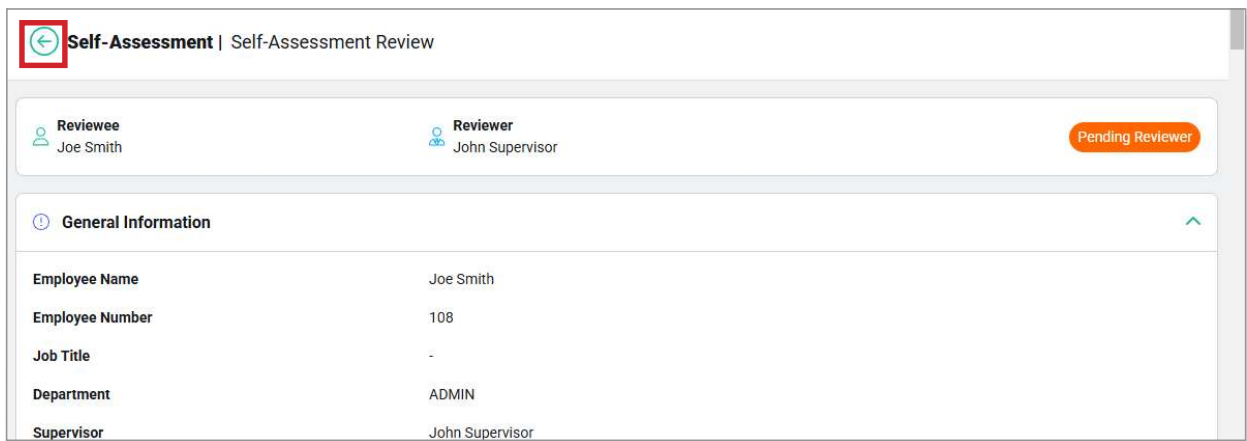
The screenshot shows the 'Self-Assessment | Self-Assessment Review' interface. At the top right, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The main content is the 'Acknowledgement (7)' section:

- Reviewee:** Please electronically sign and date your self-assessment after completing the review. A signature is required before submitting to a reviewer.
- Reviewer:** Please enter any comments and electronically sign and date after reviewee has submitted their self-assessment. A signature is required to complete the review process.
- A warning message: 'Your signature is only saved after you submit the review.'
- Reviewee Signature:** A checkbox is checked with the text 'I agree that my signature below is an electronic signature and has the same effect as my written signature. Uncheck this box if you do not agree to provide an electronic signature.'
- A large text area contains a handwritten signature.
- At the bottom left, there are two input fields: '02/05/2025' and '01:29 PM'.

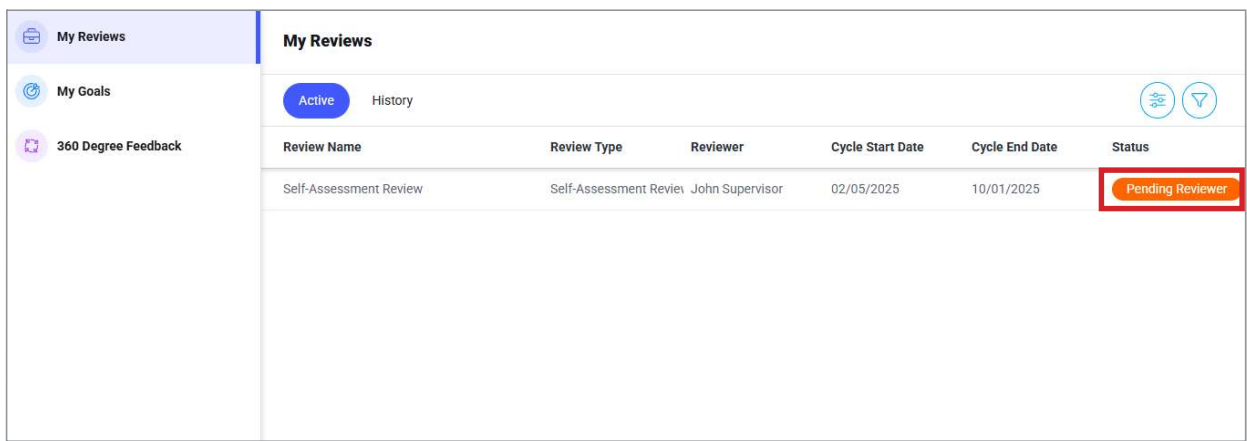
9. The Submit Performance Review dialog box opens. Select [SUBMIT REVIEW].



The Review screen refreshes and displays the updated status. Select the back arrow in the upper-left corner of the screen to return to the My Reviews screen.



The review appears in the "Active" tab with a status of "Pending Reviewer" until it is approved by your supervisor.

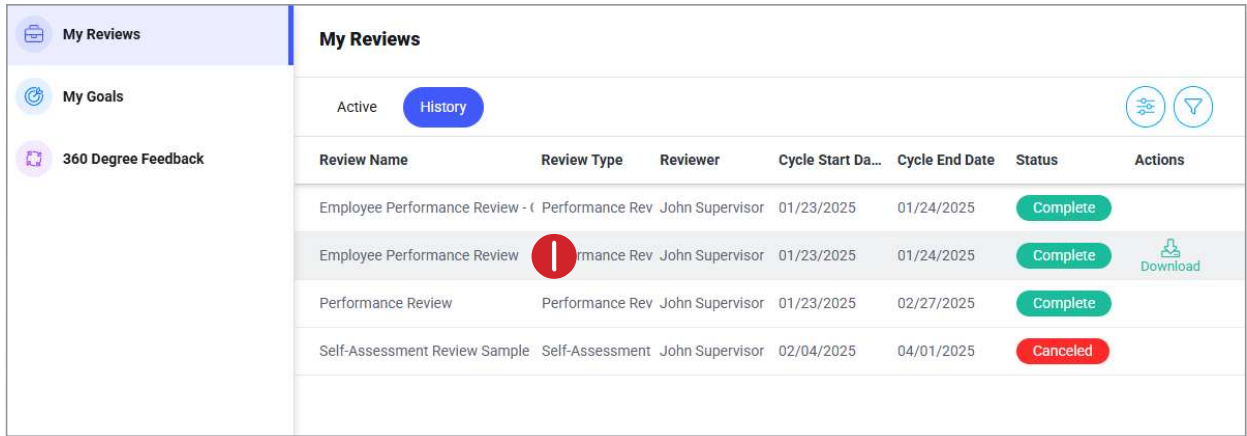


“History” Tab

The “History” tab displays your completed and canceled reviews.

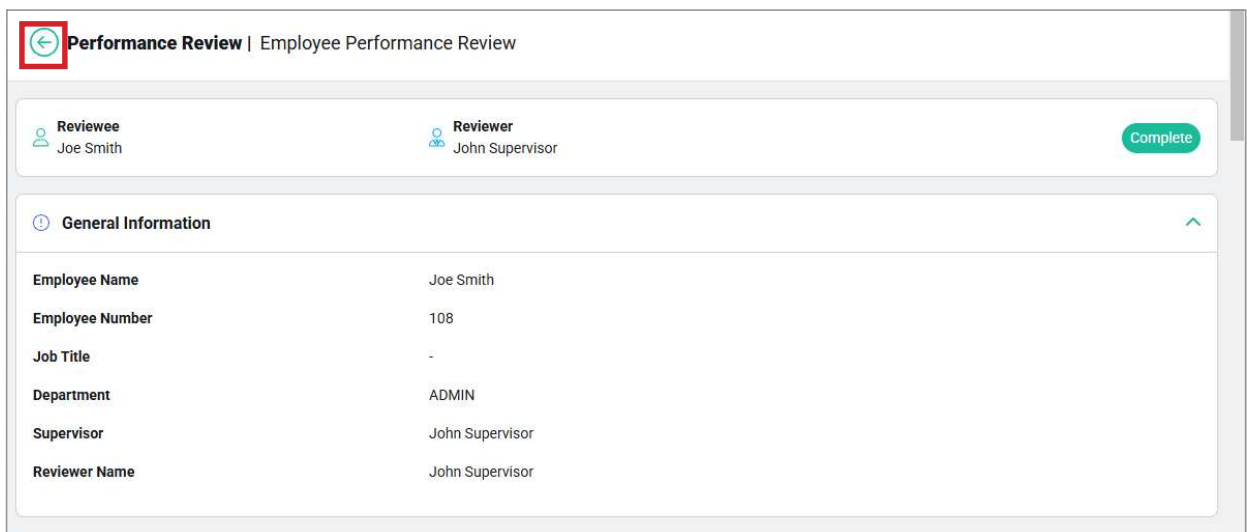
Viewing Review History

1. Select the review you want to view.



Review Name	Review Type	Reviewer	Cycle Start Da...	Cycle End Date	Status	Actions
Employee Performance Review - (Performance Rev	John Supervisor	01/23/2025	01/24/2025	Complete	
Employee Performance Review	Performance Rev	John Supervisor	01/23/2025	01/24/2025	Complete	Download
Performance Review	Performance Rev	John Supervisor	01/23/2025	02/27/2025	Complete	
Self-Assessment Review Sample	Self-Assessment	John Supervisor	02/04/2025	04/01/2025	Canceled	

2. When you are done viewing the review, select the back arrow in the upper-left corner of the screen to return to the My Reviews screen.



Performance Review | Employee Performance Review

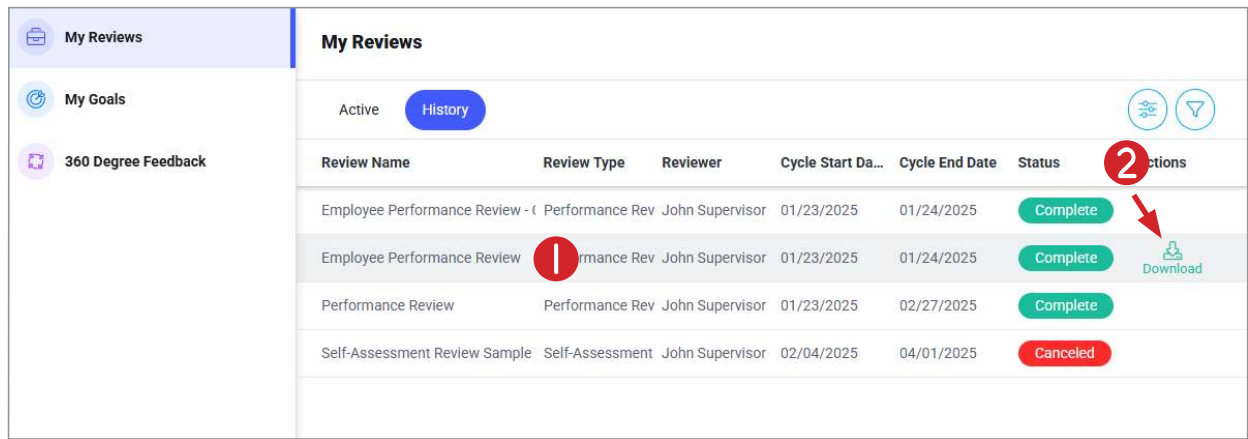
Reviewee: Joe Smith Reviewer: John Supervisor Complete

General Information

Employee Name	Joe Smith
Employee Number	108
Job Title	-
Department	ADMIN
Supervisor	John Supervisor
Reviewer Name	John Supervisor

Downloading Review History

1. Hover over the review you want to download.
2. Select [Download].

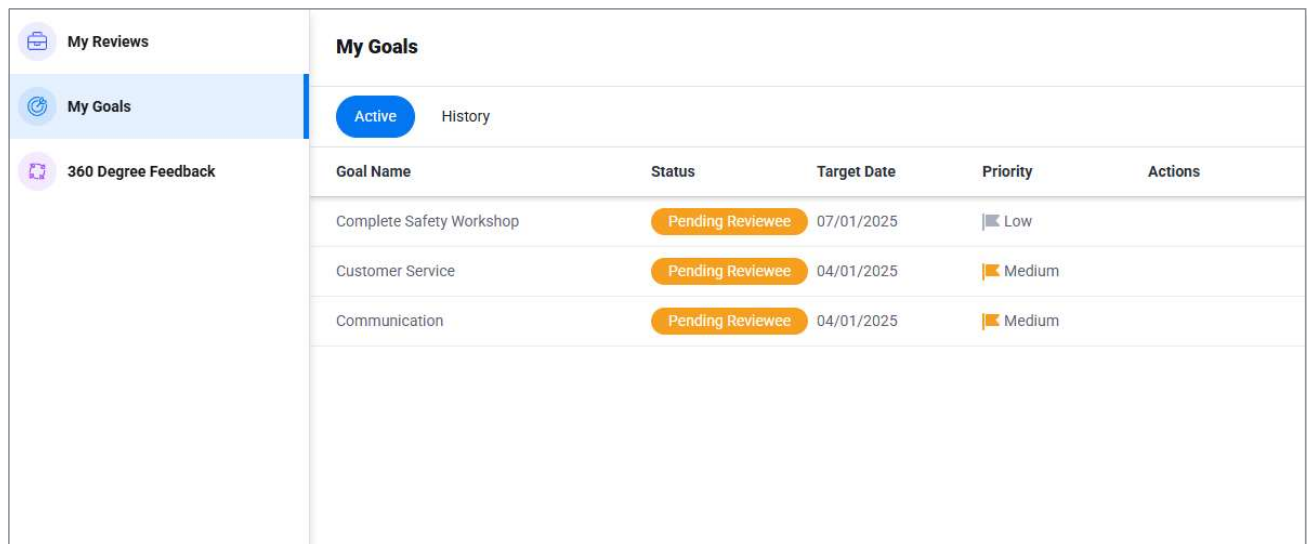


Review Name	Review Type	Reviewer	Cycle Start Da...	Cycle End Date	Status	Actions
Employee Performance Review - (Performance Rev	John Supervisor	01/23/2025	01/24/2025	Complete	Download
Employee Performance Review	Performance Rev	John Supervisor	01/23/2025	01/24/2025	Complete	Download
Performance Review	Performance Rev	John Supervisor	01/23/2025	02/27/2025	Complete	
Self-Assessment Review Sample	Self-Assessment	John Supervisor	02/04/2025	04/01/2025	Canceled	

MY GOALS

The My Goals screen displays the current and past goals assigned to you by your company's HR Department or manager.

Select the "Active" and "History" tabs at the top of the screen to navigate your goals.



Goal Name	Status	Target Date	Priority	Actions
Complete Safety Workshop	Pending Reviewee	07/01/2025	Low	
Customer Service	Pending Reviewee	04/01/2025	Medium	
Communication	Pending Reviewee	04/01/2025	Medium	

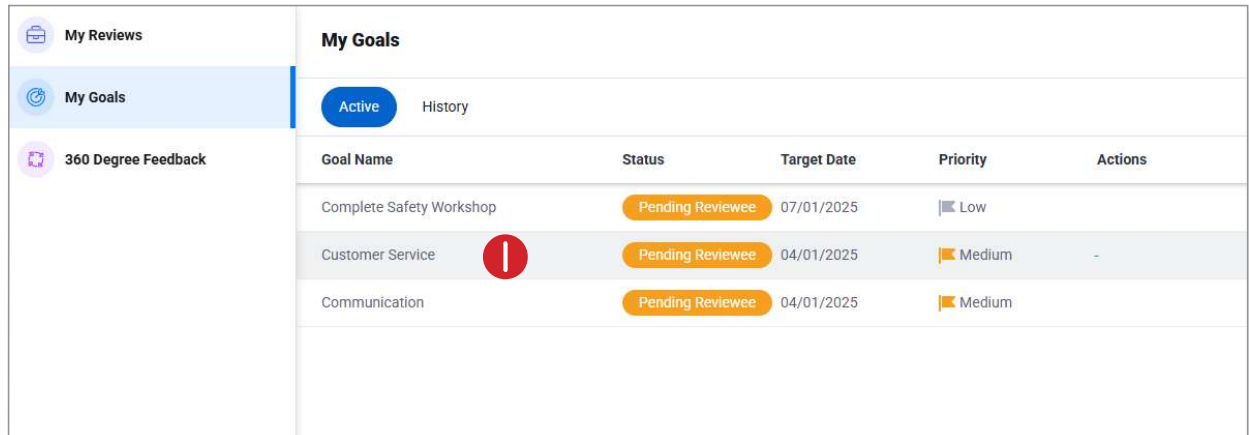
"Active" Tab

The "Active" tab displays your current goals.

You must complete any goal with a status of "Pending Reviewee."

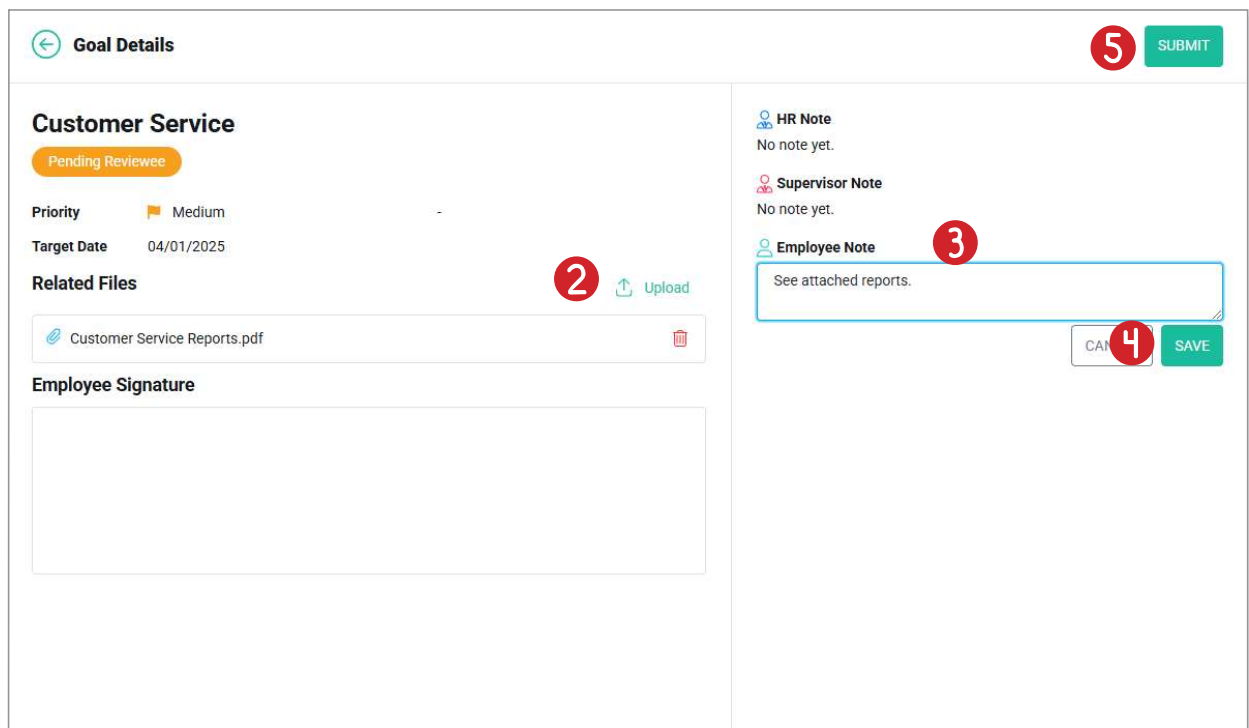
Completing Goals

1. Select the goal you want to complete.



Goal Name	Status	Target Date	Priority	Actions
Complete Safety Workshop	Pending Reviewee	07/01/2025	Low	
Customer Service	Pending Reviewee	04/01/2025	Medium	
Communication	Pending Reviewee	04/01/2025	Medium	

2. In the *Related Files* section, upload any documents you want to attach.
3. In the *Employee Note* field, enter your notes.
4. To save your notes, select [SAVE] in the lower-right corner of the screen.
5. Select [SUBMIT].



Customer Service
Pending Reviewee

Priority: Medium
Target Date: 04/01/2025

Related Files 2 [Upload](#)

Customer Service Reports.pdf

Employee Signature

HR Note
No note yet.

Supervisor Note
No note yet.

Employee Note 3
See attached reports.

[CANCEL](#) 4 [SAVE](#) 5 [SUBMIT](#)

6. The Submit Goal pop-up window opens.

- a In the *Select Reviewer* dropdown menu, select your supervisor. This field may be populated by default.
- b In the *Employee Signature* field, use your mouse, penpad, or touchpad to sign your name.
- c Select [SUBMIT].

Submit Goal

Select Reviewer * **a**

John Supervisor

Employee Signature *

I acknowledge that my electronic signature above has the full legal force and effect of my handwritten signature.

b

*Please Use Mouse, Penpad, Or Finger (On Touchscreen Device) To Sign.

LOAD SIGNATURE CLEAR Unlock

CANC **c** SUBMIT

Once submitted, the goal will appear in the “Active” tab with a status of “Pending Reviewer” until it is approved by your supervisor.

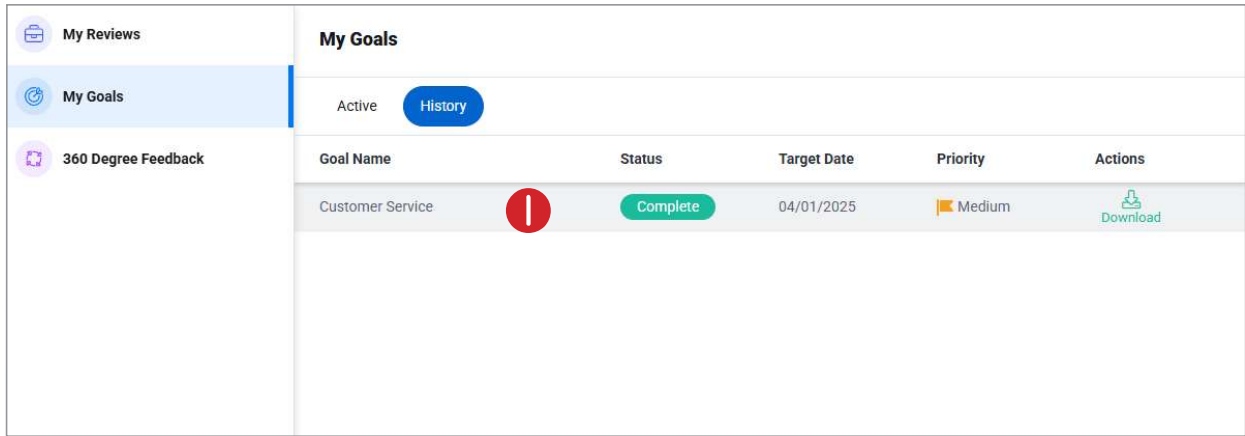
My Reviews	My Goals				
	Active	History			
My Goals	Goal Name	Status	Target Date	Priority	Actions
360 Degree Feedback	Complete Safety Workshop	Pending Reviewee	07/01/2025	Low	
	Customer Service	Pending Reviewer	04/01/2025	Medium	
	Communication	Pending Reviewee	04/01/2025	Medium	

“History” Tab

The “History” tab displays your completed and canceled goals.

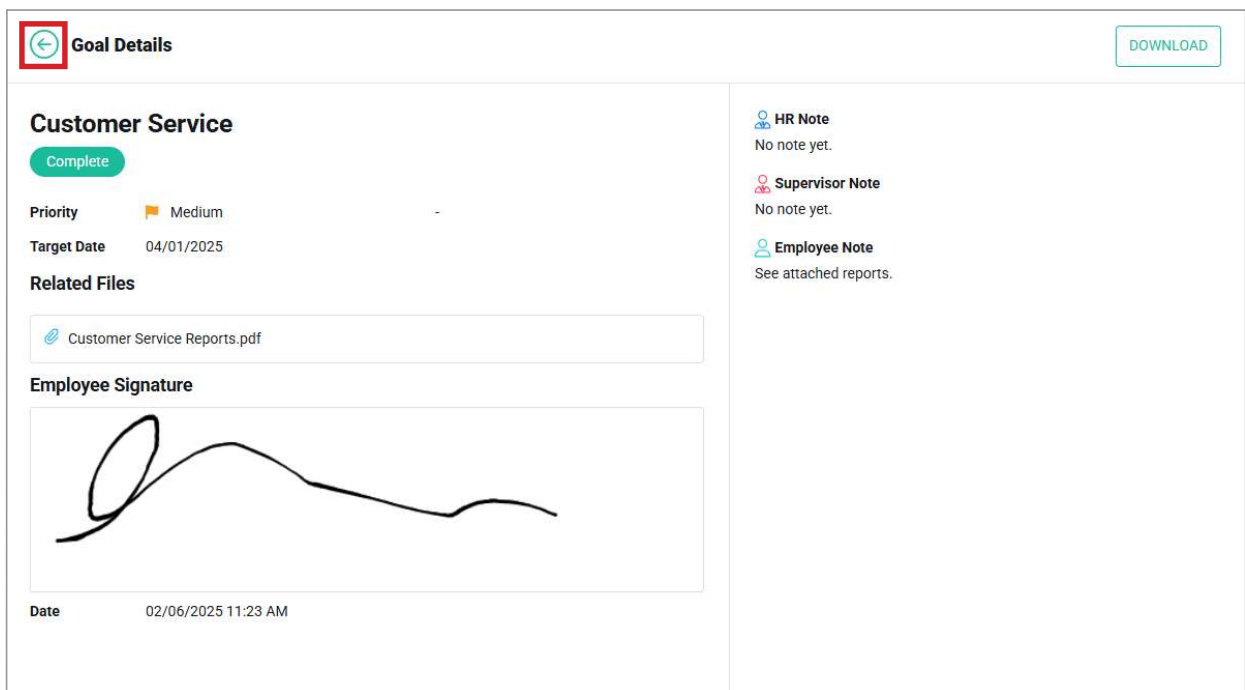
Viewing Goal History

1. Select the goal you want to view.



Goal Name	Status	Target Date	Priority	Actions
Customer Service	Complete	04/01/2025	Medium	Download

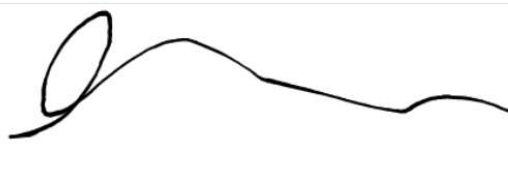
2. When you are done viewing the goal, select the back arrow in the upper-left corner of the screen to return to the My Goals screen.



Customer Service
Complete

Priority: Medium
Target Date: 04/01/2025

Related Files
Customer Service Reports.pdf

Employee Signature

Date: 02/06/2025 11:23 AM

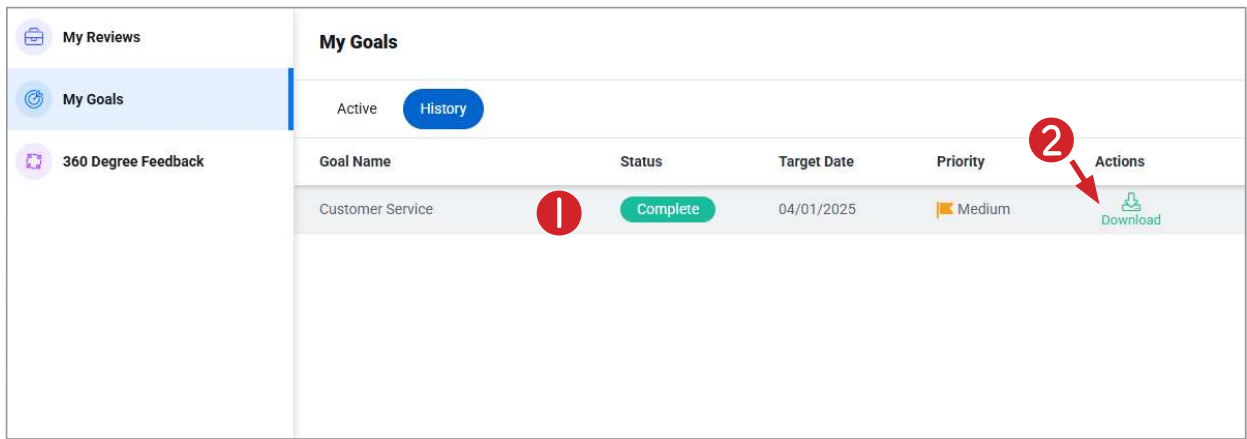
HR Note
No note yet.

Supervisor Note
No note yet.

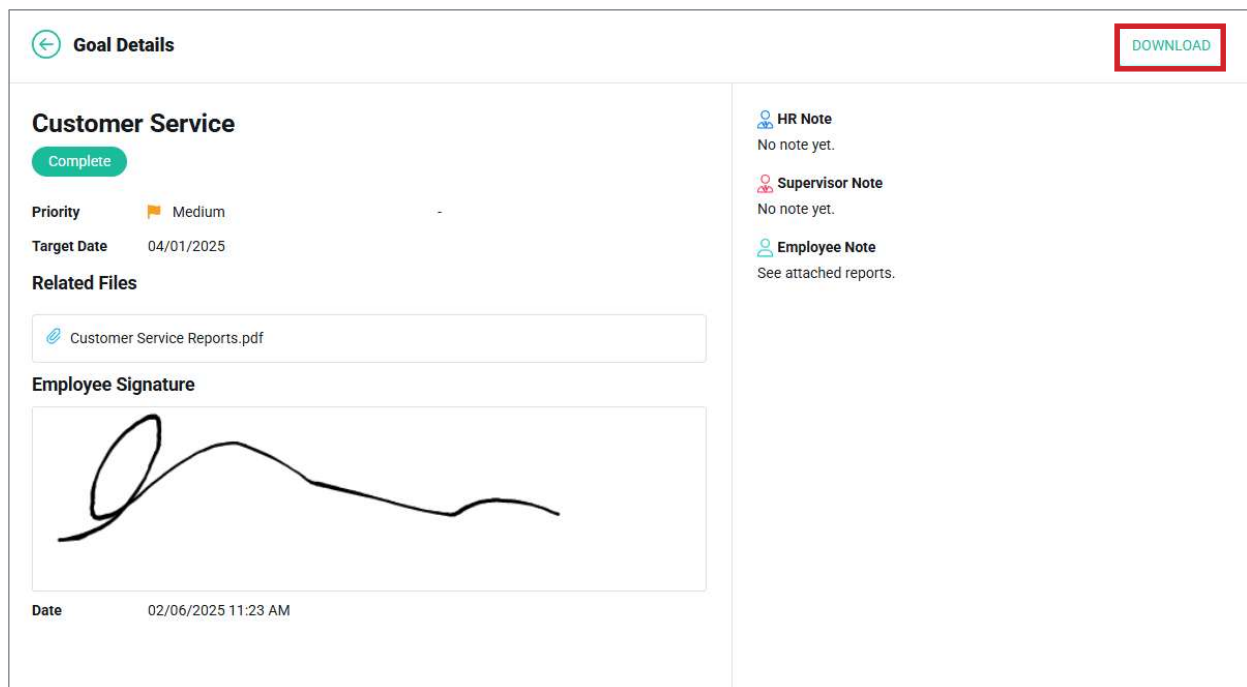
Employee Note
See attached reports.

Downloading Goal History

1. Hover over the review you want to download.
2. Select [Download].



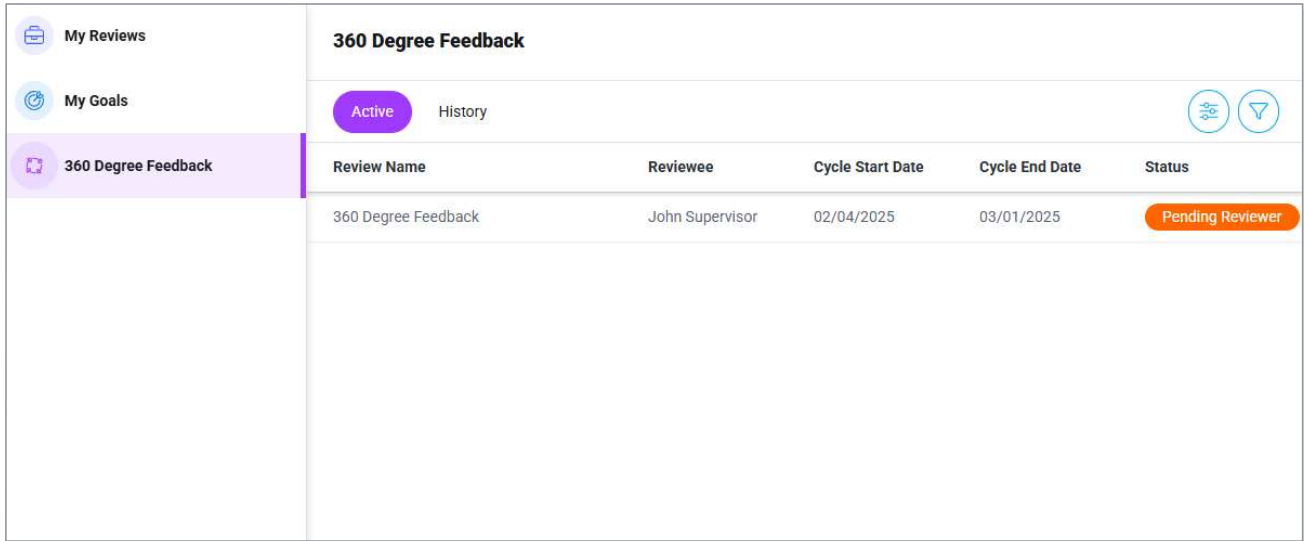
You can also download a goal history by selecting [DOWNLOAD] in the upper-right corner of the Goal Details screen.



360 DEGREE FEEDBACK

The 360 Degree Feedback screen displays your assigned and completed 360 degree feedback reviews. For this type of review, you are asked to rate the performance of another employee.

Select the "Active" and "History" tabs at the top of the screen to navigate your 360 degree feedback.



"Active" Tab

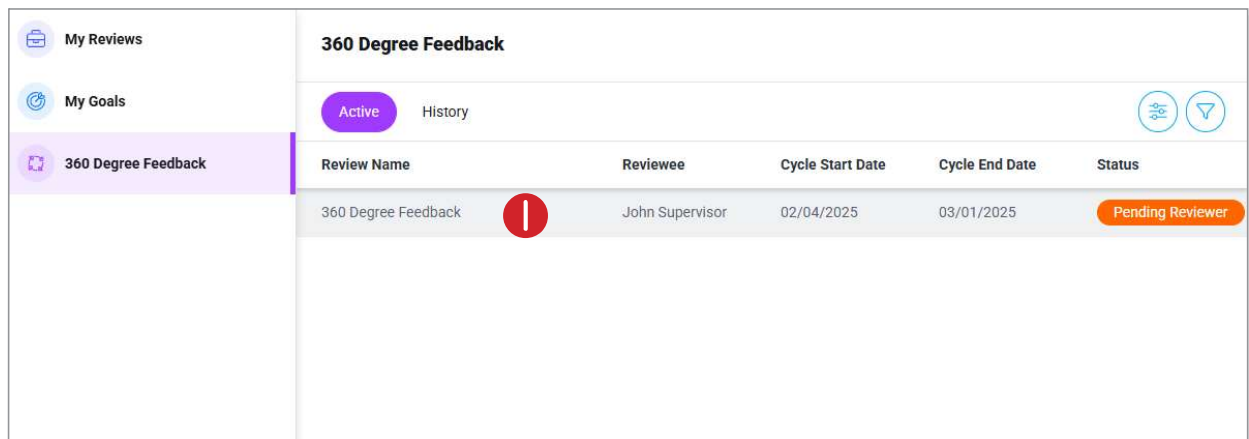
The "Active" tab displays your assigned 360 degree feedback.

You must complete any 360 degree feedback with a status of "Pending Reviewer."

Completing 360 Degree Feedback

Note: You may not see all of the sections and fields reviewed in these steps. Review settings are determined by your company's HR Department and can vary by review.

1. Select the 360 degree feedback you want to complete. The employee you will review is listed in the *Reviewee* column.



2. In the upper-right corner of the screen, select [START REVIEW].

The screenshot shows the top section of the '360 Degree Feedback' interface. At the top left, there is a back arrow and the text '360 Degree Feedback | 360 Degree Feedback'. At the top right, there is a red circle with the number '2' next to a green button labeled 'START REVIEW'. Below this, there is a table with the following information:

Job Title	-
Department	-
Supervisor	-
Reviewer Name	Joe Smith

Below the table is a section titled 'Instructions' with a red circle and the number '2' next to it. The instructions text reads: 'Reviewer: Please rate the reviewee on each question provided and enter any comments you may have for each category. Each question requires a rating. Comments are optional.'

3. In the *Instructions* section, review the instructions.

The screenshot shows the '360 Degree Feedback' interface with more details. At the top left, there is a back arrow and the text '360 Degree Feedback | 360 Degree Feedback'. At the top right, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. Below this, there is a section for 'Reviewee' and 'Reviewer'. The Reviewee is 'John Supervisor' and the Reviewer is 'Joe Smith'. There is an orange button labeled 'Pending Reviewer'. Below this is a section titled 'General Information' with a red circle and the number '3' next to it. The general information table is the same as in the previous screenshot. Below the table is a section titled 'Instructions' with a red circle and the number '3' next to it. The instructions text reads: 'Reviewer: Please rate the reviewee on each question provided and enter any comments you may have for each category. Each question requires a rating. Comments are optional.'

- In the *Review Questions* section, rate the performance of the reviewee. This section may include rating scale questions, comments, or both.

360 Degree Feedback | 360 Degree Feedback

CANCEL FINISH LATER SUBMIT REVIEW

Review Questions 4

Communication

Communicates effectively with customers and team.

1 - Never 2 - Seldom 3 - Sometimes 4 - Very Often 5 - Always N/A

Keeps customers/team informed.

1 - Never 2 - Seldom 3 - Sometimes 4 - Very Often 5 - Always N/A

Overall Communication Rating

Reviewer Note

- In the *Documents* section, review any attached documents. If you want to attach any documents to the review, select the [UPLOAD DOCUMENT] button at the bottom of the section.
- Select [SUBMIT REVIEW].

360 Degree Feedback | 360 Degree Feedback

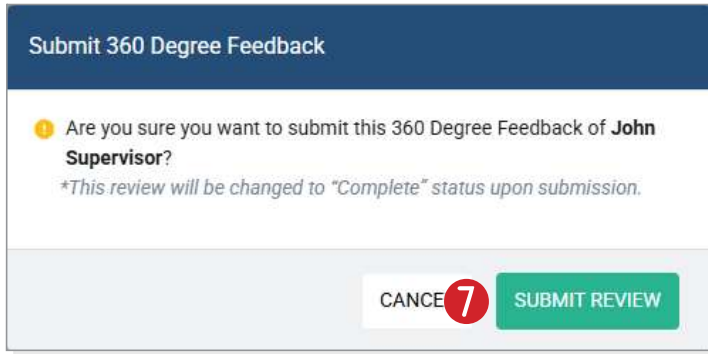
CANCEL FINISH LATER SUBMIT REVIEW

Documents 5

No Documents attached.

UPLOAD DOCUMENT

7. The Submit 360 Degree Feedback dialog box opens. Select [SUBMIT REVIEW].

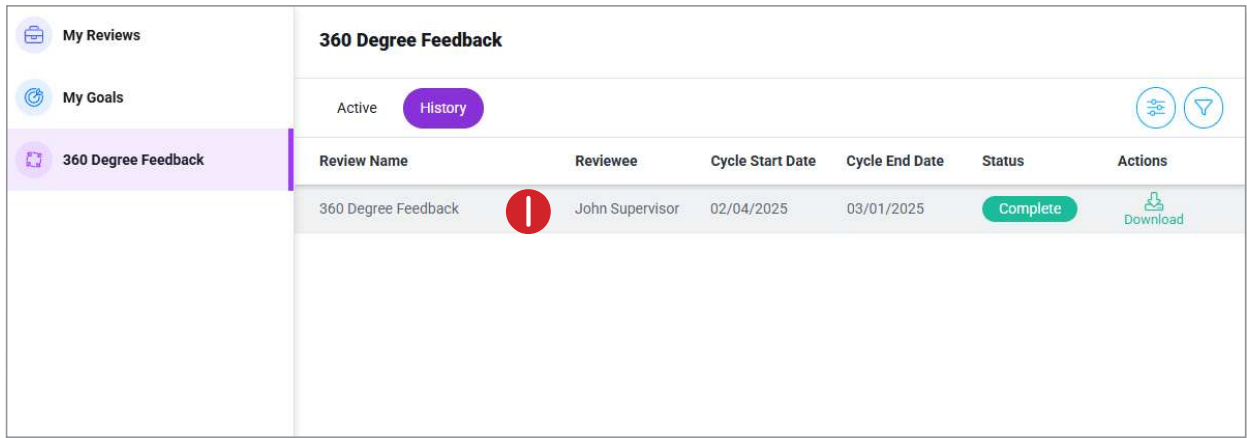


"History" Tab

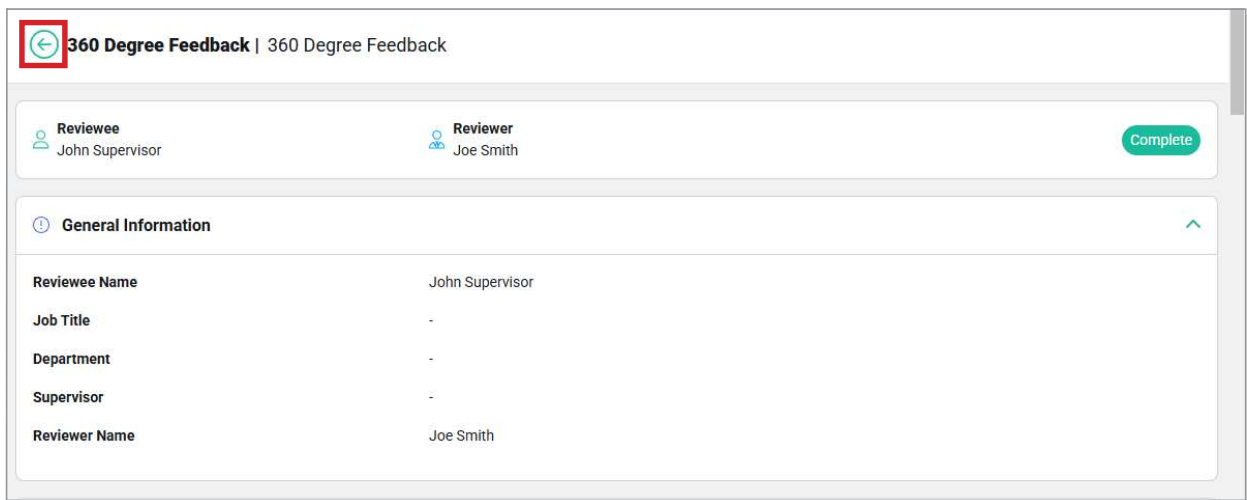
The "History" tab displays your completed 360 degree feedback.

Viewing 360 Degree Feedback History

1. Select the 360 degree feedback you want to view.

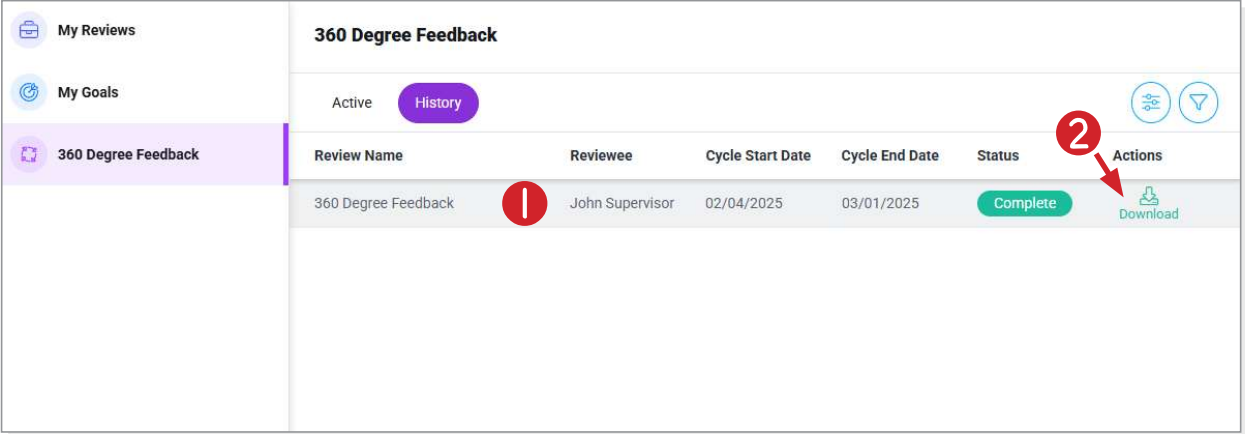


2. When you are done viewing the 360 degree feedback, select the back arrow in the upper-left corner of the screen to return to the 360 Degree Feedback screen.



Downloading 360 Degree Feedback History

- 1. Hover over the review you want to download.
- 2. Select [Download].

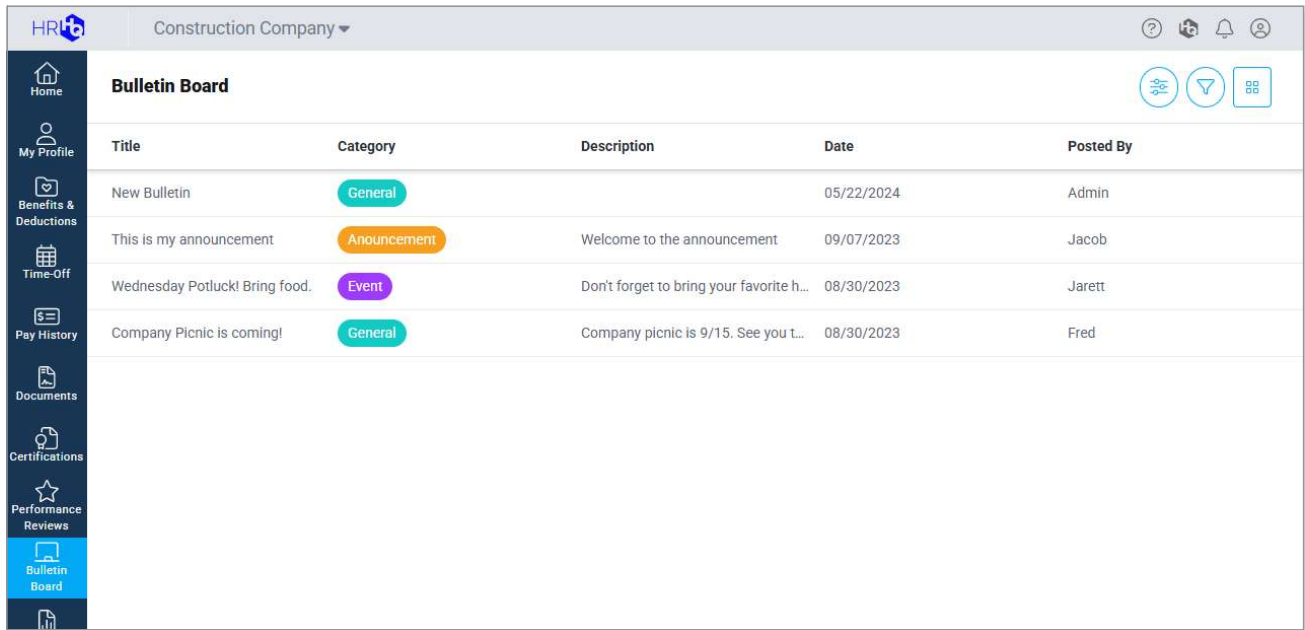


The screenshot shows a web interface for '360 Degree Feedback'. On the left is a sidebar with 'My Reviews', 'My Goals', and '360 Degree Feedback' (selected). The main area has a title '360 Degree Feedback' and tabs for 'Active' and 'History'. Below is a table with columns: Review Name, Reviewee, Cycle Start Date, Cycle End Date, Status, and Actions. A red circle with the number '2' is placed over the 'Actions' column of the first row, with a red arrow pointing to the 'Download' icon.

Review Name	Reviewee	Cycle Start Date	Cycle End Date	Status	Actions
360 Degree Feedback	John Supervisor	02/04/2025	03/01/2025	Complete	Download

hrHQ BULLETIN BOARD

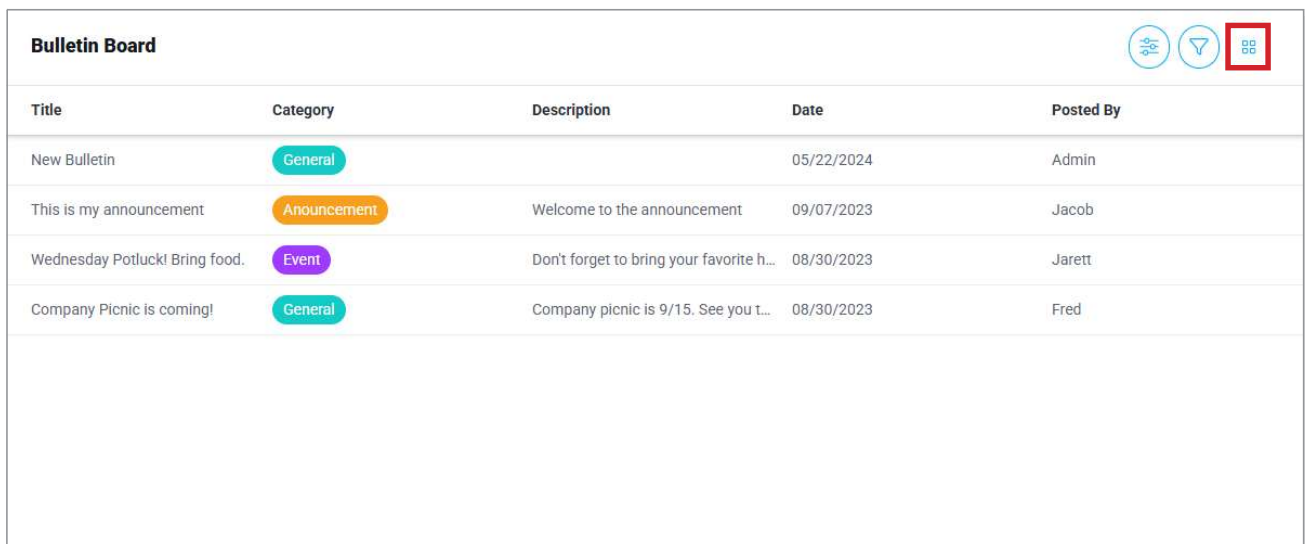
The Bulletin Board screen is where your company's HR Department will post company news, HR events, and any other useful information.



BULLETIN BOARD SCREEN DISPLAYS

You have two options for viewing the Bulletin Board screen, the grid display or the list display.

To change the current view, select the display icon in the upper-right corner of the screen.



Note: The display icon design changes based on your current view.

List Display

The List Display lists posts in a tabular format.

This view can be filtered by selecting the filter icon in the upper-right corner of the screen.

Bulletin Board				
Title	Category	Description	Date	Posted By
New Bulletin	General		05/22/2024	Admin
This is my announcement	Announcement	Welcome to the announcement	09/07/2023	Jacob
Wednesday Potluck! Bring food.	Event	Don't forget to bring your favorite h...	08/30/2023	Jarett
Company Picnic is coming!	General	Company picnic is 9/15. See you t...	08/30/2023	Fred

Grid Display

The Grid Display lists posts in a tile format.

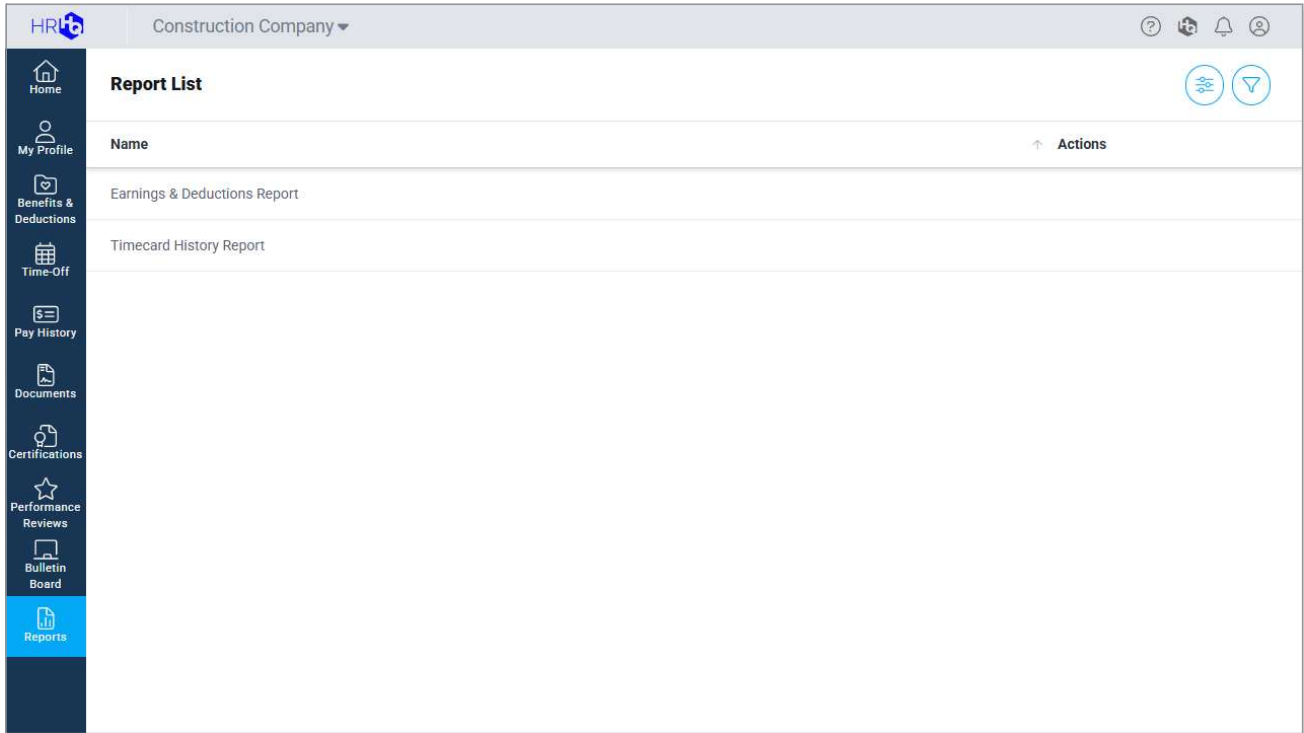
This display includes the same information as the List Display with the addition of a thumbnail image.

Bulletin Board

The grid display shows four posts in a row. Each post has a thumbnail image at the top, followed by the author's name and profile picture, the date, the title, a description, and a category tag at the bottom. The first post is 'New Bulletin' by Admin, dated 05/22/2024, with a 'General' tag. The second is 'This is my announcement' by Jacob, dated 09/07/2023, with an 'Announcement' tag. The third is 'Wednesday Potluck! Bring food.' by Jarett, dated 08/30/2023, with an 'Event' tag. The fourth is 'Company Picnic is coming!' by Fred, dated 08/30/2023, with a 'General' tag.

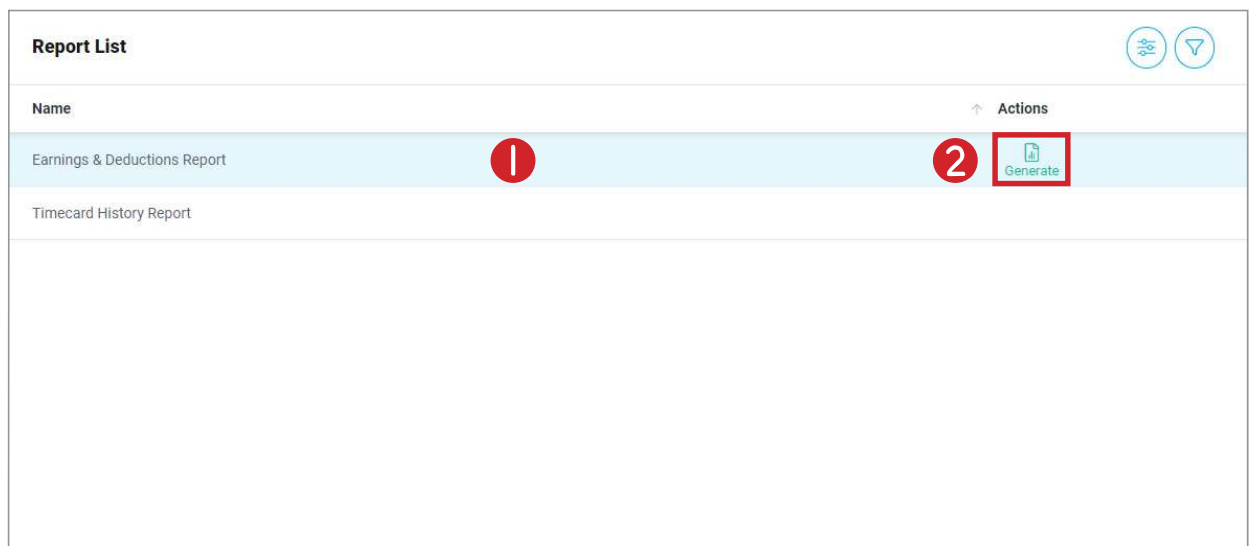
hrHQ REPORTS

The Reports screen is where you can run timecard and pay reports based on your selected date range. Available reports appear in the Report List.



RUNNING REPORTS

1. Hover over the report you want to run. A [Generate] button appears in the *Actions* column.
2. Select [Generate]. The Generate Report pane opens on the right side of the screen.



3. Complete all required fields.
4. Select [RUN REPORT] in the lower-right corner of the screen.

Report List

Name
Earnings & Deductions Report
Timecard History Report

Generate Report 3

Report Name*
Earnings & Deductions Report

From Date* 01/01/2024 To Date* 01/31/2024

CANCEL 4 RUN REPORT

5. Your report generates. Click on the arrow icon to return to the Reports screen.

← Earnings & Deductions Report 5

