

*VERSION RELEASE  
NOTES  
ENTERPRISE X*

*Grace Thomson*

*Entire Software | Level 1, 290 Frankston-Flinders Rd, Frankston South*

# EntireHR

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# EntireHR

## Enterprise Overview

Enterprise has been developed by Entire to allow greater customisation, dynamic content and ease of user functionality than ever before.

From the very first application page to finance, the system has been coded for more relevant content and effective data processing.

The three key themes throughout Enterprise are

1. End to end segregation of data from initial application through to finance.
2. Centralised file structure
3. Dynamic content

The purpose of all of these changes incorporate the fundamental difference in Enterprise is the ability to create broad v.s. specific requirements.

To achieve this, Entire have introduced a new hierarchy structure for industry and qualifications. This outlined in detail in the following pages new structure is outlined below and indicates the system has been restructured, and how this now enables the recruitment process to be defined per industry and qualification of the applicant.

## Industry Segregation

Enterprise introduces a new structure for all data in the system, aimed to streamline applicant, members and client databases within the system.

## Previous Functionality

Industry has been used to categorise applicants', members' and clients', however it has not had an impact on the system at a database level.

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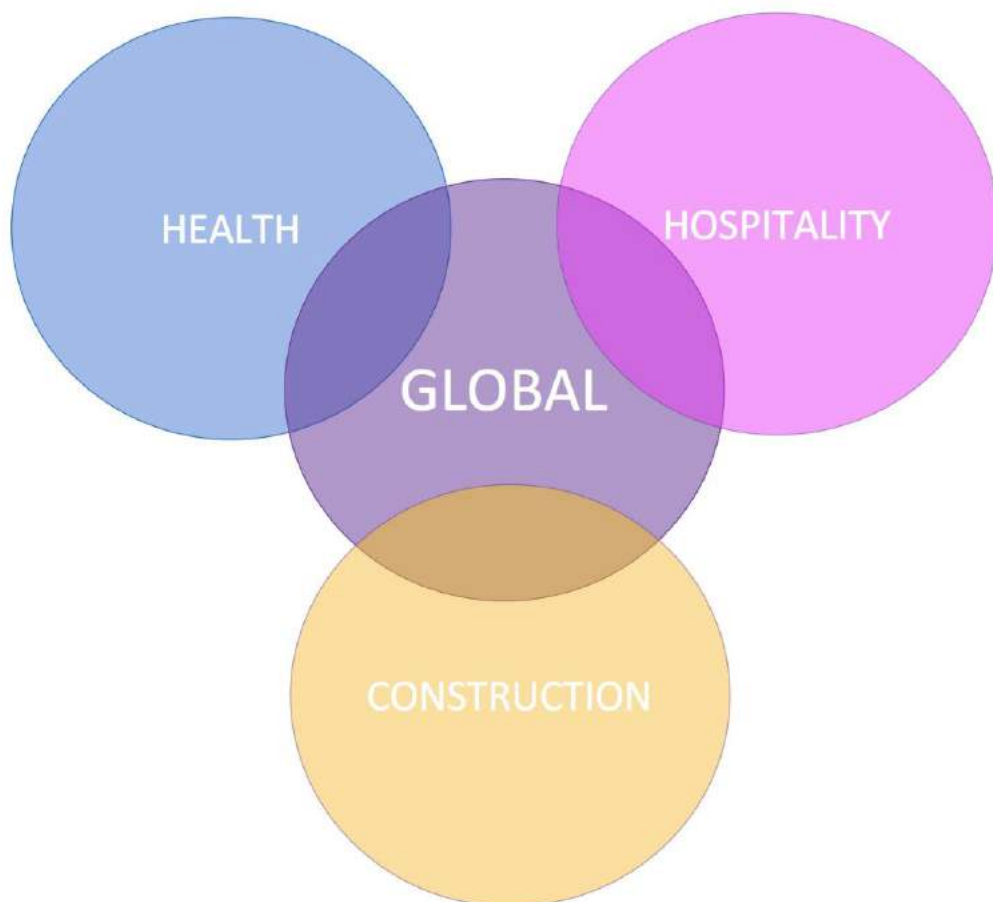
## New Functionality

All applicant, member and client data will be segregated by a hierarchy, beginning at Industry Level. This may be further specified into qualification, documents, expertise and sub expertise.

In the example shown below, the system has four active industries:

1. Health
2. Hospitality
3. Construction
4. Global

By default Enterprise will have a minimum of two active industries; a company specific industry and 'Global'.



## Global Industry

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- Global is the default Industry applied when an industry isn't specified.
- Any area of the system an industry can be nominated, and an Industry is *not* assigned - this will be automatically categorised as 'Global'.
- If an item is 'global' it will be accessible/applicable regardless of industry selected

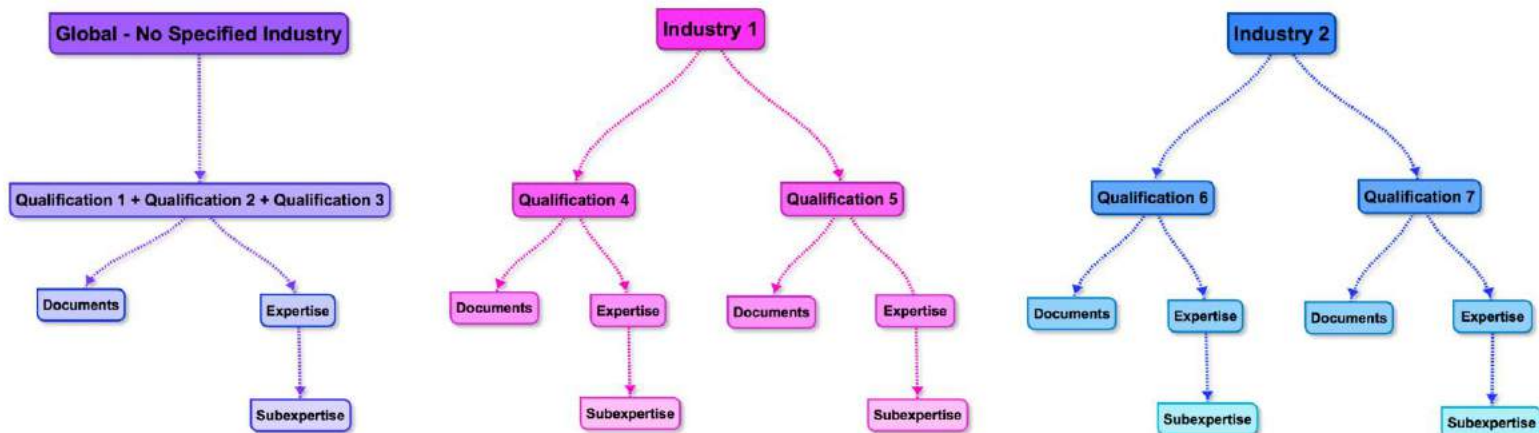
Example of Global Qualification

The same qualification is applicable across MULTIPLE industries

Example of Global Expertise

Expertise Applies to ALL qualifications

## Diagram of Global and Industry Specific Hierarchy



## Benefit of this Feature

### Recruitment

- If attached to a specific industry, documentation and expertise's considered specific to that qualification will be linked so that when progressing through applicant portal/recruitment process it is transparent what applicant has outstanding to complete or provide.

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## Allocations

- Only qualifications and expertises' applicable to the Industry the client is attached too will appear when entering bookings.

## Assigning Industries

## Previous Functionality

Employment Status

Member Name : ENTIRE ENTIRE FAMILY NAME | Member Qualification : RN

Employee ID: 1000141\_

Employee Status: ACTIVE

Members Priority: 5 - AM SHIFTS PREFERRED

Industry Type: HEALTHCARE

Attached to Office: VICTORIA

Member Hire Date: 04/01/2018

Employee History

Save

Member Status Log

Date	Time	Employee Status	Employee reason	Entered In System
08/11/2018	20:48	ACTIVE		ENTIRE
08/11/2018	20:46	ACTIVE		ENTIRE
04/01/2018	20:30	ACTIVE		ADMIN

Exit

- Members could work across multiple industries regardless of qualifications or expertise.
- A Member's Primary Industry was nominated at time of activation in system under Employment Status (as shown below)

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## New Functionality

Member Name : FELICITY SMOAK | Member Qualification : RN

Personal Details | Education

**Personal Details**

Title \* MISS  
Family Name \* SMOAK  
First Name \* FELICITY  
Middle Name  
Preferred Name  
Gender \* Female  
Date Of Birth \* 24 Jul 1989  
Own Car \* Yes  
Years of Experience \* 1 YEAR

**Contact Details**

E-mail \* gfrickley69@gmail.com  
Home Phone No  
Other No  
Mobile No \* 0000090000  
Preferred Contact Time  
Preferred Contact No

**Postal Address**

Address Type \* HOME

**Additional Address**

Edit	Address Type	Street / PO Box no.	Country	State	Suburb	Post Code	Memo	Delete
✓	HOME	1/3 BRAYS LANE	AUSTRALIA	NEW SOUTH WALES	WALLERAWANG	2845		

**Emergency Contact Details**

Name OLIVER QUEEN  
RelationShip HUSBAND  
Home Phone No  
Work No  
Mobile No 911911911

**Office Attached to**

Office \* PARRAMATTA  
Alternative Office --Select--

**Industry \*** HEALTH

**Applicants Comments**

Need a day job.

Save & Continue Exit

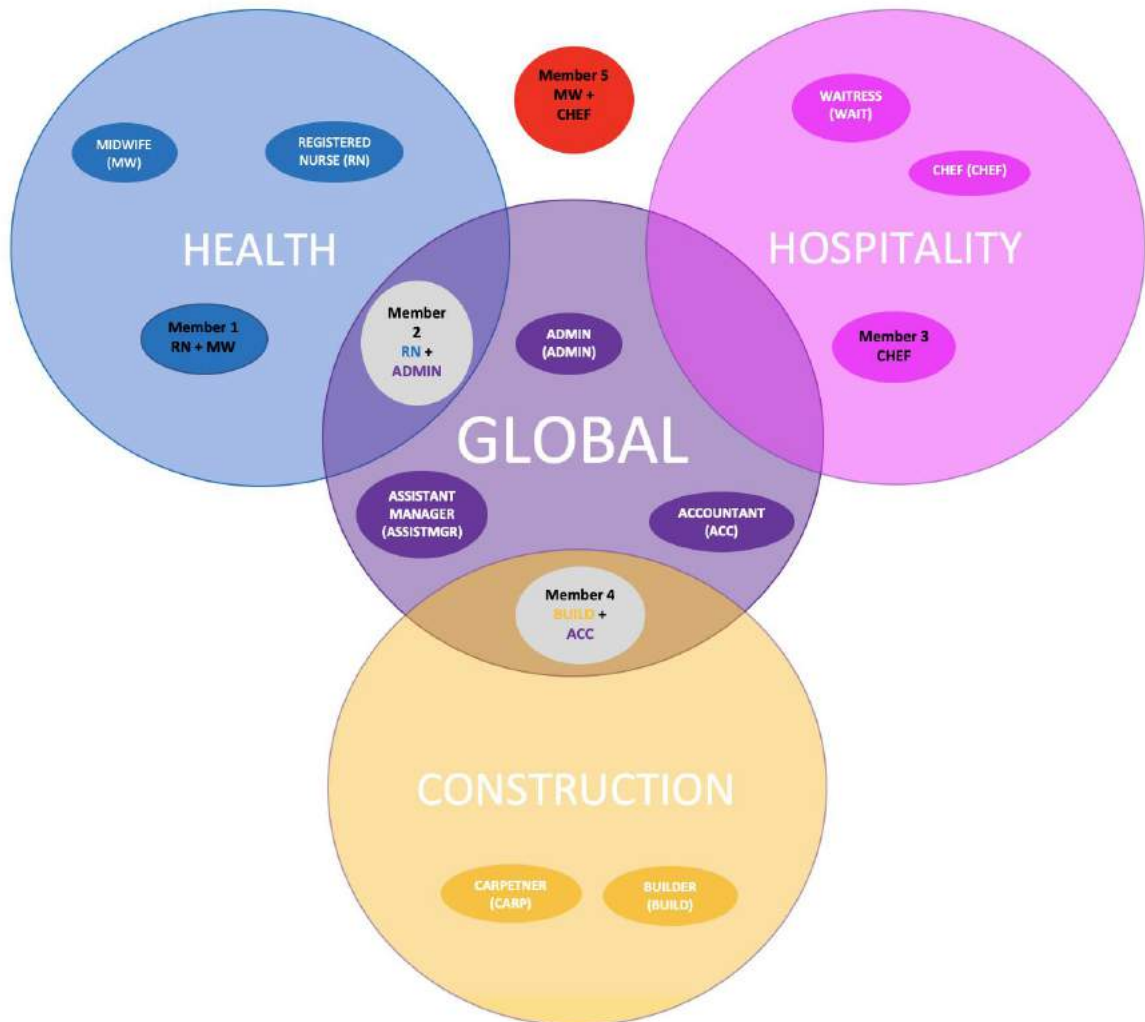
- Members' industry must be selected under Personnel Details before selecting relevant qualification and expertise under Education tab.
- Members' primary industry must correspond to their qualification – visual provided below in Dual Qualifications<sup>1</sup>.

<sup>1</sup>A member can only be linked to global qualifications OR those within their assigned Industry.



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## Member with Dual Qualifications



Members' with dual qualification may be either:

1. Assigned multiple qualifications within the same industry  
*i.e. Member 1 and Member 3*

OR

2. Assigned a combination of ONE Specific Industry and Global Qualification  
*i.e. Member 2 & Member 4*

*Diagram of Industry and Qualification Interaction*

3. Member **cannot** be a combination of TWO Specific Industries, as they cannot be correctly saved in the database or retrieved for searches or reporting purposes.

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i.e. **Member 5**

*Overview of how this structure will alter the functionality of various modules in the system*

**i. Casual Application Page**

Applicants can be redirected to industry specific application pages if required, and further customisation is applicable as applicant nominates chosen industry and qualification.

**ii. Applicant Portal**

Qualifications, Expertise, Documentation and Hyperlinks will be displayed based on the applicant's industry and qualification.

**iii. Member File**

Member can only be nominated for qualification and expertise within their nominated industry. Documents are further segregated into of Health, Training, Compliances and Documentation.

**iv. Member App and Portal**

Qualifications, Expertise and Hyperlinks will be displayed based on the member's industry and qualification.

**v. Allocations (Quick + Multi Booking)**

Qualification and Expertise options displayed in dropdown list will filter according to industry and qualification selected respectively.

**vi. Client Portal**

Qualification, Expertise and hyperlinks options displayed will filter according to industry and qualification of client.

To structure these changes according to company requirements please review the relevant sections in Masters.

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## Neutral/Other Gender



We are pleased to introduce a neutral gender to EntireHR.

- **Recruitment**
  - i. Mx and 'Other' will be available for selection on the casual application page.
- **Allocations**
  - ii. When applicable the icon below will be displayed in gender column the client allocations screen.

## Masters

### General Changes to Masters

To allow easier navigation and customisation by clients, several changes have been made throughout Masters for Enterprise

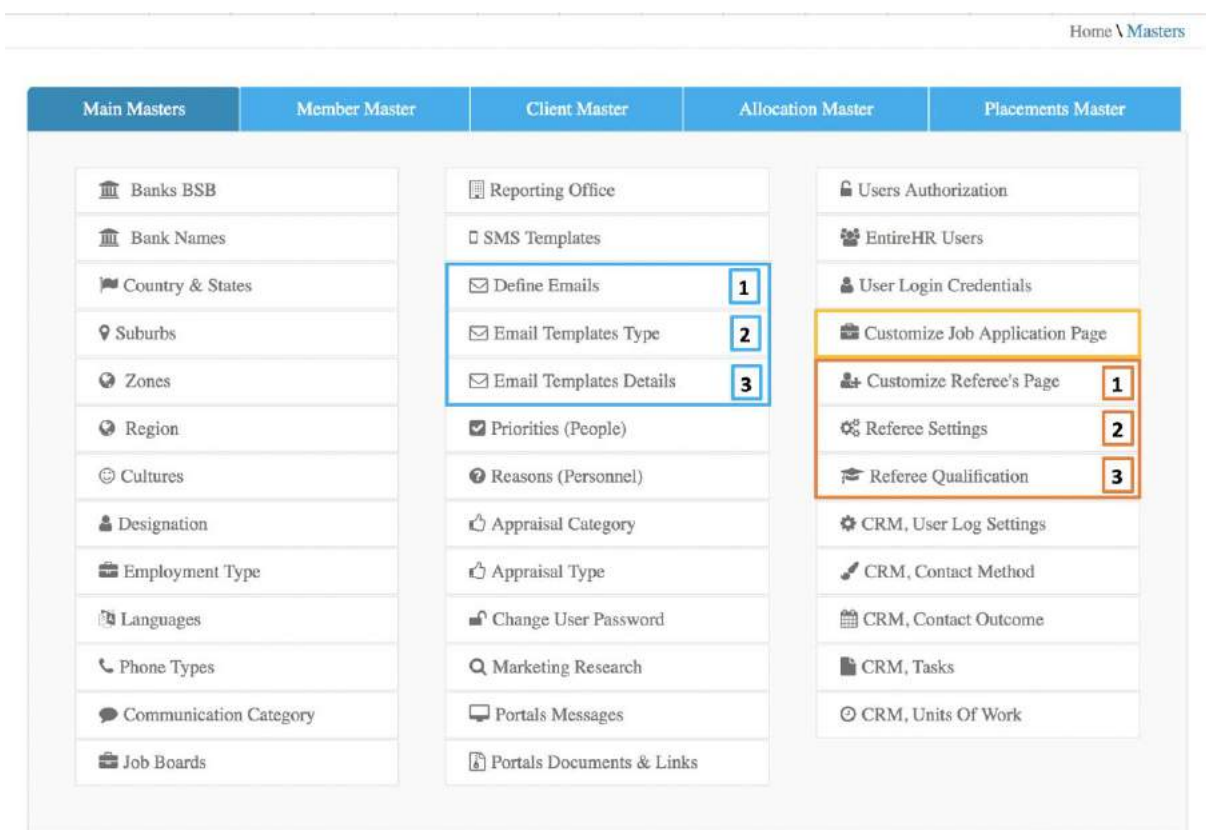
1. **Listed in Alphabetical Order and User Friendly Names**
2. **Increased Admin Alterations Available**
  - i. More options may now be altered upon request by Entire Support Team without requiring a system release to activate the changes.

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## New Modules for Enterprise with Masters Setup Required

1. Dynamic Email Templates
2. Casual Application Page
3. Online References Masters

Below is a visual of the new additions in main masters according to the new modules introduced in Enterprise.

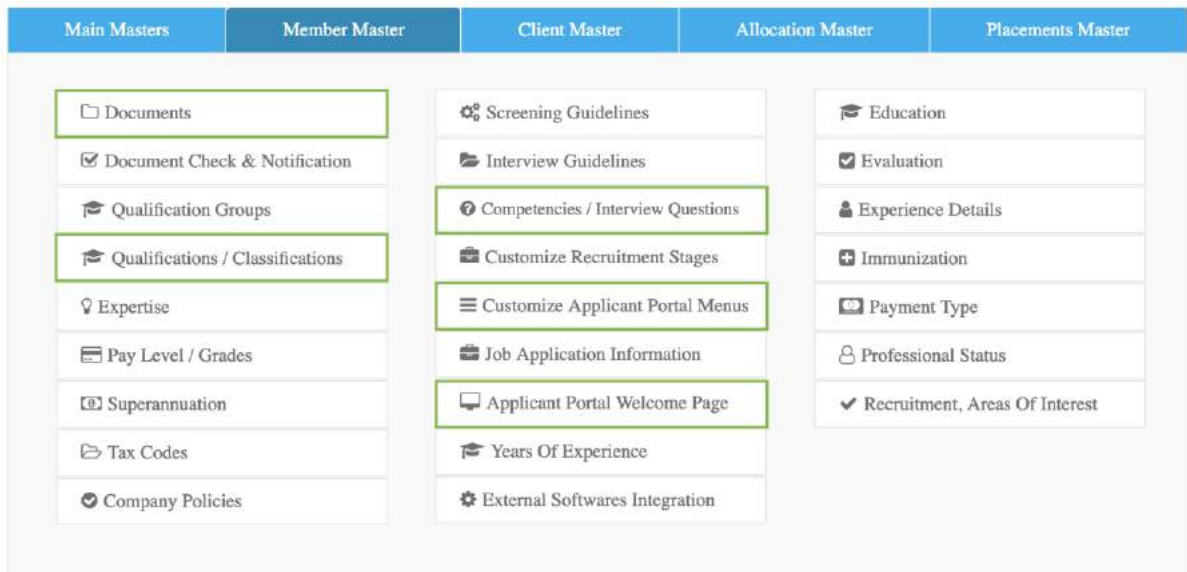


## Member Master New and Altered Modules

Member Masters has also been updated to reflect the increased adaptability of Enterprise.

Below is a visual of the new and updated sections of member masters according to the new or adapted modules in Enterprise.

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## New Document Structure and Hierarchy

### Qualification + Documents Hierarchy

Pathway: Masters>Member Masters>**Qualification/Classification**>Select Qualification>Select + Save Relevant Documents.

HEALTH RN REG NURSE Yes No 599 Yes No ACTIVE

Attach Documents Save Close

Document Type	Document Description	Training Document	Health Document	Show / Must For Members	Show / Must For Applicants	Status	Created By	Created On	Updated By	Updated On
<input type="checkbox"/>	IDENTIFICATION CARD AUSTRALIAN STUDENT IDENTIFICATION	No	No	Yes	Yes	ACTIVE				
<input type="checkbox"/>	IDENTIFICATION CARD EFTPOS	No	No	Yes	No	ACTIVE				
<input checked="" type="checkbox"/>	IDENTIFICATION CARD MEDICARE	No	No	Yes	No	ACTIVE				
<input checked="" type="checkbox"/>	IDENTIFICATION CERTIFICATE BIRTH	No	No	No	Yes	ACTIVE				
<input type="checkbox"/>	IDENTIFICATION CERTIFICATE OF CITIZENSHIP	No	No	No	No	ACTIVE				
<input type="checkbox"/>	IDENTIFICATION CERTIFICATE OF MARRIAGE FOR MAIDEN NAME ONLY	No	No	No	Yes	ACTIVE				
<input checked="" type="checkbox"/>	IDENTIFICATION LICENCE AUSTRALIAN DRIVERS WITH PHOTOGRAPH	No	No	Yes	Yes	ACTIVE				
<input type="checkbox"/>	IDENTIFICATION LICENCE AUSTRALIAN GOVT ISSUED WITH PHOTOGRAPH	No	No	No	Yes	ACTIVE				
<input type="checkbox"/>	IDENTIFICATION LICENCE FOREIGN DRIVERS	No	No	No	No	ACTIVE				
<input checked="" type="checkbox"/>	IDENTIFICATION PASSPORT CURRENT	No	No	No	Yes	ACTIVE				
<input type="checkbox"/>	IDENTIFICATION TEST_IDENTIFICATION	No	No	Yes	Yes	ACTIVE				
<input checked="" type="checkbox"/>	EDUCATION AHPRA REGISTRATION	No	No	Yes	Yes	ACTIVE				
<input checked="" type="checkbox"/>	EDUCATION BASIC LIFE SUPPORT	No	No	Yes	No	ACTIVE				
<input type="checkbox"/>	EDUCATION CERTIFICATE	No	No	Yes	Yes	ACTIVE				

**In this example the selected documents are being linked to RN Qualification which is linked to Health Industry**

**Training Document + Health Document Columns will display according to how this document has been set up in Document Master**

### Benefit of this Feature

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This feature will streamline the applicant portal and therefore the recruitment process. The applicant will only be prompted to provide documentation linked to their nominated qualification as 'mandatory' via the applicant portal. Similarly, this will prevent members from providing irrelevant documentation.

## Entire Recommend

Entire recommend linking all documents which company guidelines indicate applicant may be required to provide prior to progressing to interview.

## Important to Note:

### 1. This should not be used for Client Compliances

Documentation which is required by the client (training/record of acknowledgement/documentation required prior to attending a shift etc.)

### This will restrict what internal staff can attach and view in member file.

Only documents which are linked to that qualification will be displayed and can be attached to members file.

## New Member File Structure

Health and Training

The framework of documents has been adapted to provide greater clarity in members' files, documentation and for reporting purposes.



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Accordingly, existing and new documentation must be set up in Masters according to the instructions below to allow this structure to be utilised.

**Training + Health must be created as Document Types**

**Options for Document Transfer if Migrating to Enterprise from Professional Document Transfer Process**

**Option 1:** All relevant documents must be 'recreated' under these Categories

**Option 2:** EntireHR can transfer these documents at the database level at a cost

Edit	Document Type	Training File	Health File	Seq. No.	Show / Must for Members	Show / Must for Applicants
	HEALTH	No	Yes	10	Yes	Yes
	TRAINING	Yes	No	1	No	No
	COMPLIANCE	Yes	No	1	Yes	Yes
	IDENTIFICATION	No	No	1	No	No
	WWC	No	No	1	No	No
	EDUCATION	No	No	2	Yes	Yes
	PERMITS AND CHECKS	No	No	3	Yes	Yes

Health and Training Document Type must say **YES** for Documents be categorised in Member File as Health or Training Details rather than Generic Documents.

Pathway: Masters>Member Masters>Documents

## Setting Document Visibility<sup>2</sup>

Applicant Portal and Member App

Edit	Document Type	Training Documents	Health Documents	Display (Seq. No.)	Show to Members	Status
	IDENTIFICATION	No	No	4	Yes	ACTIVE
	INDUCTIONS	Yes	No	1	Yes	ACTIVE
	PERFORMANCE	No	No	2	Yes	ACTIVE
	PERMITS AND CHECKS	No	No	3	Yes	ACTIVE

Edit	Document Description	Documents Points	Verification Req.	Start Date	Show to Members	Required (Applicants)	Expiry Date	Reference Number	Snap	App Sync Keyword	Status
	MANUAL HANDLING	1	No	Yes	Yes	Yes	No	No	Yes		ACTIVE
	POLICE CHECK	2	Yes	Yes	Yes	Yes	No	Yes	Yes	POLICECHK	ACTIVE
	SPARE	1	Yes	No	Yes	Yes	Yes	Yes	Yes		INACTIVE
	SPARE2	1	Yes	No	Yes	Yes	Yes	Yes	Yes		INACTIVE
	SPARE3	3	Yes	No	Yes	Yes	Yes	Yes	Yes		INACTIVE
	SPARE4	55	No	No	Yes	Yes	Yes	Yes	Yes		ACTIVE
	VISA PERMIT	20	Yes	No	Yes	Yes	Yes	Yes	Yes	VISACHK	ACTIVE
	WORKING WITH CHILDREN PERMIT	1	No	Yes	No	Yes	Yes	Yes	Yes	WWCCHK	ACTIVE

Show to Members  
If YES document will be visible on Members App

Required (Applicant)  
If YES document will be listed as (Mandatory) on the Applicant Portal

<sup>2</sup> Document MUST be attached to qualification for these settings to be applicable

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## Allocations

### Shift Edit Enhancements

- i. Office
- ii. Paylevel

### Dynamic Email Templates

*Pathway>Shift Status*

### New Functionality

Enterprise allows dynamic email templates in all areas of the system.

### Features of Dynamic Emails Templates include

1. Ability to **Define** the Email Address Applicant or Member **Receive Emails' From**
2. Ability to **Define** whether an Applicant or Member can Reply to Email Templat
3. If Email Response is 'ON'; ability to **define one or more return Email Address's**
4. Ability to Preview and Edit Email Template Prior to Sending
5. Ability to Select/Unselect Preset Options in Template
6. Ability to Include Shifts Fields/Details (finance notes, booking notes etc)
7. All Emails are now logged CRM<sup>3</sup> by default unless 'Create Log' is Unchecked

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<sup>3</sup> provided this module is included in your EntireHR subscription



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## Kendo Allocations

The screenshot displays the Kendo Allocations interface. At the top, there are quick links for Recruitment, Talent, Personnel Card, Member, Clients, Allocations, Appointment, Availability, and Restrictions. Below this is a search bar and a breadcrumb trail: Home \ Allocation \ Client Allocations. A toolbar contains various action icons such as Full Screen, Filter, Ready, Note, Refresh, Status, Edit, Multi, Quick, Book, Unlock, Apport, Accept, Decline, Remove, Confirm, and Cancel. The main table lists shift allocations with columns for Meter, Last, Shift Status, Notes, Shift Status, SMS, Member(s), Priority, Office, B.N, Service Location, Delivery Location, Qualification, and Expertise. The table is divided into sections: FINALIZE (2 shifts), HOLD (3 shifts), PROCESS (4 shifts), and COMPLETED (22 shifts). Each row includes icons for actions like Member Accepted, Member Assigned, Shift Release, and Shift Error.

Meter	Last	Shift Status	Notes	Shift Status	SMS	Member(s)	Priority	Office	B.N	Service Location	Delivery Location	Qualification	Expertise
SECTION : FINALIZE (Total Shifts : 2) FINALIZE - 1, HOLD - 1, PROCESS - 1, COMPLETED - 1													
03...		Member has Accepted.	ENTERED BY CLIENT	MEMBER ACCEPT...	01	CUONG NGO	3	LISMORE		ADSSI - SERVICE		ADMOFFICR+L...	
26...	01...			MEMBER ACCEPT...	01	ANTHONY CRAIG SMITH	5	SYDNEY		3S SERVICE		DRIVER	
SECTION : HOLD (Total Shifts : 3)													
02...				MEMBER BROADC...	01	DONNA GOLDING,PENNI...	11	GEELONG		11 BLACKWOOD PLACE 2		LABOURER+ACC...	1P - TAXI
51...	00...			MEMBER ASSIGNED	01	ABHISHEK BACHAN	5	SYDNEY		3S SERVICE1		DRIVER	
00...			SHIFT EDITED BY USER ADMIN 01/04/2019 ...	MEMBER BROADC...	01	SAMANTHA CHIODO,ABHL...	3	SYDNEY		HOSPITAL GROUP		LABOURER+ACC...	
SECTION : PROCESS (Total Shifts : 4)													
02...			Shift Edited by ADMIN at 01/04/2019 09:12. Sh...	SHIFT RELEASE	01		3	SYDNEY		HOSPITAL GROUP		CARER+KTCNH...	
66...	00...		This shift is from Quick booking	SHIFT ENTERED	01		3	ENTIRE S...		TESTER_SERVICE_CLIENT_2	TESTER_DELIVE...	STOREPERSN	
00...			Shift Edited by ADMIN at 01/04/2019 09:12. Sh...	SHIFT RELEASE	01		3	SYDNEY		HOSPITAL GROUP		CARER+KTCNH...	
26...	00...			MEMBER REMOVED	01			SYDNEY		3S SERVICE		DRIVER	
SECTION : COMPLETED (Total Shifts : 22)													
00...	04...			SHIFT BOOKED	01	ALEXANDER CHARLES W...	1	CANBERRA		Brnd Constructions Crookwell		LABOURER	
01...	00...		ADAM BLAKE PULLED OUT	SHIFT ERROR	01		11	GEELONG		11 BLACKWOOD PLACE 2		LABOURER	

A new refreshed look on the Classic Allocations in both format and functionality. Classic Allocations has been recoded from its foundations, using the latest technology available. This has enabled us to turbocharge the processing speed of allocations and minimize the reliance on individual internet connections. Kendo Allocations introduces brand new functionality, in the form of superspeed processing of bookings and new icons.

### Benefits of this Feature

#### 1. Streamlined for Speed

- All the display changes, from the updated icons to the adapted filter fields, has been designed to minimize the processing time required.
- Kendo Allocations has increased the speed and efficiency of the system so much, we were able to remove the speed icon entirely!

#### 2. User Friendly Functionality


- Up to 1,500 Bookings Displayed on One Page


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- i. Users will be able to expand the number of bookings per page up to 1,500 - a considerable difference to the system capacity currently.
- Regardless of number of bookings displayed, there are no delays when adding quick filters - with results appearing instantaneously.

## 3. Decluttered Display

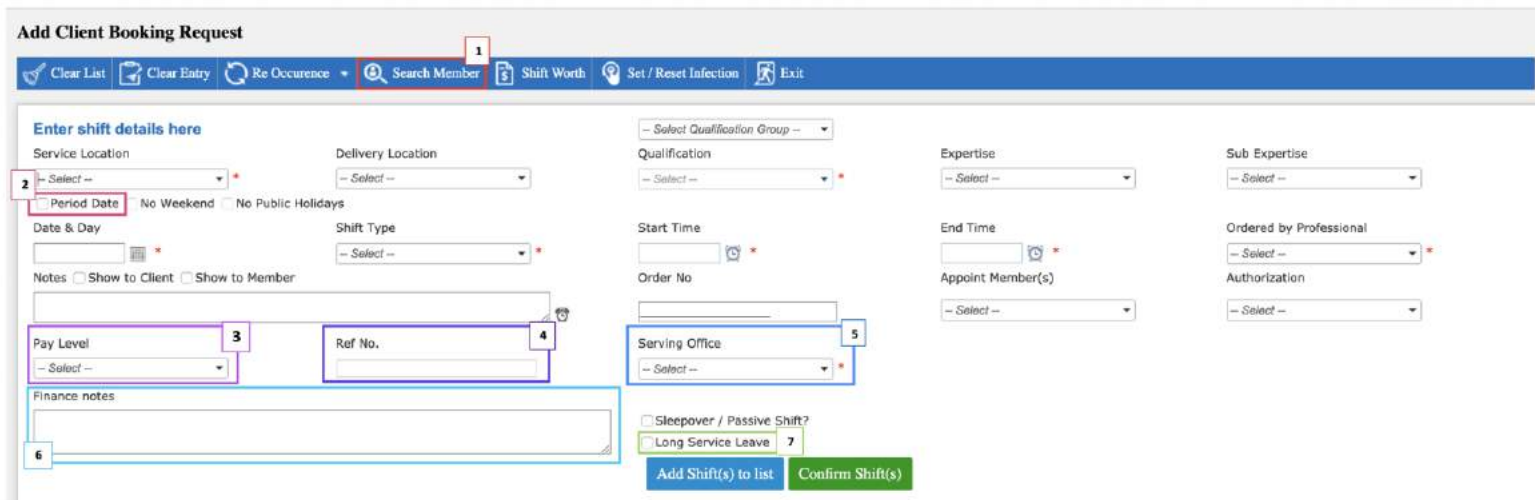
- **Extraneous Icons have been Removed**

- i.  Accessible from in 3 other locations in Client Allocations (Availability Bubble, Member Contact Card and Right Click Options respectively); enabling us to remove this icon.

- ii.  Removed as no longer required.

## Multi Booking Enhancements

Available on Staff Portal & Professional App



The screenshot shows the 'Add Client Booking Request' form. It includes a top navigation bar with buttons for 'Clear List', 'Clear Entry', 'Re Occurrence', 'Search Member', 'Shift Worth', 'Set / Reset Infection', and 'Exit'. The main form area is titled 'Enter shift details here' and contains several sections: 'Service Location' (with a dropdown menu), 'Delivery Location' (with a dropdown menu), 'Qualification' (with a dropdown menu), 'Expertise' (with a dropdown menu), and 'Sub Expertise' (with a dropdown menu). There are also fields for 'Period Date', 'Date & Day', 'Shift Type', 'Start Time', 'End Time', 'Order No.', 'Appoint Member(s)', 'Authorization', 'Pay Level', 'Ref No.', 'Serving Office', and 'Finance notes'. At the bottom, there are checkboxes for 'Sleepover / Passive Shift?' and 'Long Service Leave', and two buttons: 'Add Shift(s) to list' and 'Confirm Shift(s)'. Numbered callouts (1-7) highlight specific elements: 1 points to the 'Search Member' button; 2 points to the 'Service Location' dropdown; 3 points to the 'Pay Level' dropdown; 4 points to the 'Ref No.' field; 5 points to the 'Serving Office' dropdown; 6 points to the 'Finance notes' text area; and 7 points to the 'Long Service Leave' checkbox.

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## Legend of New Options for Multi-Booking<sup>4</sup>

1	<p style="text-align: center;"><b>Search Member</b></p> <p>This new feature allows you to 'multi-appoint' a member for up to 30 shifts. It will search all members in allocated date range who meet booking criteria and who are NOT booked for any shift during this period. Additionally, if member is immediately accepted into period of bookings, system will enter 'not available' casual availability for member.</p>
2	<p style="text-align: center;"><b>Period Date</b></p> <p>This allows you to enter booking for a specified date range at time of booking.</p>
3	<p style="text-align: center;"><b>Pay Level</b></p> <p>This allows you to enter an alternative pay level for the nominated qualification upon booking. When alternative pay-rate is selected system will display proposed pay and invoice rate for total hours<sup>5</sup>. If left blank system will process the booking with member's primary pay-level.</p>
4	<p style="text-align: center;"><b>Ref No</b></p> <p>This is only an active field in EntireHR finance. Depending on your company structure this may be used as an additional tracking number by the finance department for bookings.</p>
5	<p style="text-align: center;"><b>Servicing Office</b></p> <p>This allows you to enter an alternative office for the nominated client upon entering booking. If left blank system will display the booking with client's default office.</p>
6	<p style="text-align: center;"><b>Finance Notes</b></p> <p>Depending on your company structure this allows you to input finance notes immediately upon booking for where required.</p>
7	<p style="text-align: center;"><b>Long Service Leave</b></p> <p>Depending on your company structure, selecting this option allows this shift to be recorded for certain member's financial requirements.</p>

---

<sup>4</sup>**Please note: any of the below options when selected will override the relevant client or member defaults**

<sup>5</sup> Note: if Shift Worth is active for client's online permissions; a complete overview will be provided to members, including break deductions, expertise rates and allowances.

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## Important to Note

- i. Only **30 bookings or less** may be entered using 'Add Shift to List'  
This restriction has been enforced due to reported issues when the system became overloaded from bulk bookings exceeding this amount<sup>6</sup>.
- ii. Duplicate Shift and Booking Ratio have been introduced to minimise the impact of this restriction<sup>7</sup>.

## Bulk Push Notification Enhancement

Service Location: TEST ENTIRE SERVICE      Delivery Location:      Shift Date: 20/03/2019      Shift Type: PM      Starts: 14:00      End: 23:00

**List of matched Members**

Rem...	Employee ID	Member Name	Gender	State	Office	Priority	Language	Notific... Status
Mobile Type: ANDROID (Total : 1)								
<input type="checkbox"/>	360811	EXAMPLE MEMBER	F	VICTORIA	GEEELONG	1		FAILED
Mobile Type: IPHONE (Total : 1)								
<input type="checkbox"/>	360811	EXAMPLE MEMBER	F	VICTORIA	GEEELONG	1		FAILED

1 - 2 of 2 Members

**List of matched Members**

	Total Users	Server Response Status	Successful Users	Failed Users
Total	2		0	2
Android Push Notification	1	FAIL	0	1
iOS Push Notification	1	FAIL	0	1

**Push Notification Message**

Client: TEST ENTIRE SERVICE - WED 20/03/2019 PM. Please tap to open the Members app to see the shift details.

141 Characters Remaining                 

## Previous Functionality

Previously selecting *Released Shift – Send Notification* option sent a generic push notification message which sent one-by-one - in alphabetical order.

<sup>6</sup> This does not apply if directly entering booking; using Confirm Shift instead of Add Shift to List

<sup>7</sup> Details on these features and functionality are available via EntireHR Support Website in Version 8.10 - Release Notes

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This would delay booking staff due to size of notification list and was a extremely time consuming process of each push notification sent individually.

## New Functionality

System picks up customised/dynamic text and sends all messages out to complete list of members **at once**.

Legend of Bulk Push Notification Screen	
1	<b>Only Select Members you DON'T want to Notify</b> In contrast to the requirements of most areas within the system; Members only need to be selected if they are being <u>removed</u> from the notification listing prior to sending.
2	<b>Additional Filters</b> Additional Filters are available with the Bulk Push Notification which have no previously been available within Searches <i>i.e. Language</i>
3	<b>Instant Feedback</b> Notification Status now provides instant feedback for each individual about the success of the push notification.
4	<b>Customised Messages</b> Bulk Push Notifications can be used where required in place of bulk SMS messages and reach the same amount of individual's who can see the released booking.

## Benefits of this Feature:

### Speed

- Bulk push notification process will not place high data processing requirements on the system.
- No more spinning wheels! The System will not 'freeze' the screen while it is processing as the process is completed within 1 second (instead of 2 – 5 minutes).

# EntireHR

## Important to Note:

### Push Notification Criteria Still Applies

- This push notification will apply the same criteria as any other released shift<sup>8</sup>.

### Members must Delete & Re-install App Post Upgrade

- Following the upgrade, to receive push notifications, members must have the latest version of the app installed

## Member Details Report Enhancement

*Report Pathway: Reports>Member Reports>Member Detail Report*

Previously exporting member details report exported all possible member fields regardless of the filters applied in EntireHR.

This has now been adjusted so that when selecting *Export Members Report to Excel*; this report will export according to the filters selected.

Home \ Reports \ Members Report

<sup>8</sup> See EntireHR's help site for this criterion

# EntireHR

## Talent Search

Talent search combines all of the best features of contact member and personnel card searching capabilities and rolls them into one comprehensive search!

The screenshot shows the 'Talent Search' interface. At the top, there is a 'Quick Links' bar with icons for Recruitment, Talent (highlighted with a yellow circle), Personnel Card, Member, Clients, Allocations, Appointment, Availability, and Restrictions. Below this is the 'Talent Search' form with the following fields:

- Country \* (AUSTRALIA)
- State \* (Select State)
- Zone (Select Zone)
- Post Code
- Service Office (Select Service...)
- Has Police Check (Select)
- Members Priority (Select Priority)
- Industry (AGRICULTURE)
- Qual (Select Qualific...)
- Expertise (Select Expertise)
- Pay Level (Select Pay Level)
- Area of Speciality (Select Area of...)
- Has WWC Check (Select)
- Application Status (Select Applica...)
- Recruiter Assigned (Select Recruiter)
- Has Resume (Select)
- Transport (Select)
- Experience (Select Experie...)
- Is Resident (Select)
- From Date of Apply
- Source of application (Select Source)
- From Interview Date
- To Interview Date
- Job ref#
- Member only (No)

Below the form, there are checkboxes for 'Has Document', 'Check All Documents', and 'Exclude Expire'. A green 'Display Candidates' button is located below these checkboxes. At the bottom right, there are 'Send Sms' and 'Send Email' buttons. Below the form is a table with the following columns: ID, First Name, Last Name, Email ID, Mobile, Qualification, Expertise, Source, Application ..., Status, and Resume.

The talent search utilises the same coding within Kendo Allocations that has enabled us to super charge allocations processing speeds.



This design enables users to search for any kind of 'Talent' (which can be as specific as a certain document on file) across the entirety of EntireHR database – from new applicants to inactive members and anyone in-between *in seconds*.

# EntireHR

## Recruitment





### Formatting Casual Application Page (Masters)

Pathway: Masters>Main Masters>Customise Job Application Page

Legend for Customise Job Application Page	
	<p><b>Fields Edited in Other Masters Fields</b></p> <p>All fields with green outline are not adjustable via the application page because they are adjusted within other areas of Masters.</p> <p><i>i.e. Industry is adjusted under Industry in Main Masters</i></p>
	<p><b>Mandatory/Optional</b></p> <p>Fields which have the option of mandatory/optional can be made mandatory at company's discretion.</p> <p>Fields with an * are always Mandatory due to system requirements.</p>



# EntireHR

 	<p style="text-align: center;"><b>Show / Hide</b></p> <p>Fields which have the option of show/hide can be completely customised and displayed according to company's preferences. Fields with an * are always Mandatory due to system requirements.</p>
 	<p style="text-align: center;"><b>Preview/Save Buttons</b></p> <p>'Preview' allows you to see a visual of the application page applicants' will view before selecting 'save' to confirm changes.</p>

**Important to Note:**

- If setting up the Casual Application Page by Industry is of interest, please enquire further with EntireHR as additional links may need to be generated and incorporated into your EntireHR setup.
- Mandatory/Optional and Show/Hide Functionality can only be applied if setting up industry specific Casual Applications Page<sup>9</sup>.

# EntireHR

<b>INBOX (7)</b> COFFS HARBOUR(4) NEWCASTLE(1) QUEENSLAND(1) TUGGERAH(1)	<b>LEFT MESSAGE (2)</b> MELBOURNE (1) PARRAMATTA (1)	<b>CALLBACK (2)</b> NEWCASTLE(1) TUGGERAH(1)	<b>APPLICANT LOGIN (9)</b> PAINE TIM AMIT CHANDRA ANKIT RAWAT VIPUL BANSAL THOMAS KELLY	<b>TBC INTERVIEWS (7)</b> CANBERRA(2) COFFS HARBOUR(2) GRAFTON(1) PARRAMATTA(1) SYDNEY(1)
<b>INTERVIEWS (1)</b> PENRITH(1)	<b>NON COMPLIANT (4)</b> APPLICANT (2) MEMBER (2)	<b>REFERENCE PENDING (7)</b> ADELAIDE (4) CANBERRA (1) COFFS HARBOUR (11) GRAFTON (7) LISMORE (4) NEWCASTLE (1) PENRITH (8) TUGGERAH (1)	<b>RESCHEDULE (65)</b> BLAKE THOMSON (1) BLAKE THOMSON (2) BLAKE THOMSON (1) BLAKE THOMSON (1) BLAKE THOMSON (7) BLAKE THOMSON (9)	<b>ACTIVATE MEMBER (7)</b> CANBERRA(2) GEELONG(1) GRAFTON(1) NEWCASTLE(2) PENRITH(1)
<b>DEFERRED (4)</b> CANBERRA (1) COFFS HARBOUR (1) NEWCASTLE (1) QUEENSLAND (1)	<b>REAPPLY (3)</b> CANBERRA (1) COFFS HARBOUR (1) NEWCASTLE (1)	<b>NEVER EMPLOY (4)</b>	<b>DECLINED (5)</b> CANBERRA(1) COFFS HARBOUR(3) QUEENSLAND(1)	<b>TFN DECLARATIONS (22)</b> ADELAIDE(1) CANBERRA(1) COFFS HARBOUR(3) GRAFTON(2) LISMORE(2) NEWCASTLE(5) PARRAMATTA(2) PENRITH(4) TUGGERAH(2)

## Recruitment Dashboard and Processes Enhancements

New Recruitment Dashboard View

The new dashboard includes the integration of two brand new modules with the latest coding and completely dynamic functionality.

These two sections of the dashboard introduce **members references** and **TFN declarations if applicable**. This allows for applicants to 'progress' through the recruitment process and commence working while they have outstanding references or TFN declarations as these details will remain on file.

### 1. References Pending

This new module will be comprehensively covered under Online References Module

### 2. TFN Declarations

This new module will be comprehensively covered within Electronic TFN Declarations and TFN Verification and Submission to ATO

# EntireHR

## Dynamic Email Templates

### Previous Functionality

Previously the system sent auto-generated emails according to an applicant's progression through the recruitment dashboard. These were sent unless the 'send email' box was unticked before confirming an applicant's progress.

This was problematic for clients who declined or deferred applicants based on a wide-range of criteria or required transparency and / or records of emails sent to be accessible.

### New Functionality

The screenshot displays the 'Screen Applicant / Assign Recruiter Screen' for 'Tester Tester134 Test'. The form includes fields for Industry (TIMBER), Qualification (DATA ENTI), Expertise (ACCOUNTING I), Years of Exp (1 YEAR), M/F (M), Email ID (pawan@entiresoftware.com), DOB (27/10/1993), Own Car (Yes), Mobile (0400000135), Home (Nt), State (Acacia Hills), Area of Speciality (Testing), Job Source (WEBSITE), Availability (Shifts Monday to Friday), Job Ref Code, and Comments. The 'Screen & Process' section has radio buttons for 'Screen & Process', 'Confirm Interview', 'TBC Appointment', and 'Provide Login'. The 'Application Status' is set to 'INTERVIEW' and the 'Follow up Date' is 'DD-MM-YYYY'. The 'Applied office' is 'QUEENSLAND' and the 'Email Template' is 'APPLICANT LOGIN'. The 'Auto Email' checkbox is checked and highlighted with a red box and a red '1'. The 'Interview Guidelines' section includes checkboxes for 'Work Type', 'Industrial- Hearing', and 'Industrial- Physical Labour'. The 'Other Options' section includes 'Send SMS', 'Preview Email', 'Upload / View Resume', 'View Cover Letter', 'View Recruiters Appointments', 'View Office Appointments', 'Add Log', and 'View Log'. The 'Recruitment Officer' field is empty, and the 'Appointment From' and 'Appointment To' fields are also empty. The bottom of the form has buttons for 'EDIT ONLY', 'CONFIRM', and 'CANCEL'.

Enterprise allows dynamic email templates in all areas of the system, including each stage of the application process.

# EntireHR

## Features of Dynamic Emails Templates include

8. Ability to **Define** the Email Address Applicant or Member **Receive Emails' From**
9. Ability to **Define** whether an Applicant or Member can Reply to Email Template  
If Email Response is 'On'; ability to **define one or more return Email Address's**
10. Multiple Email Templates per Recruitment Stage and / or per Office
11. Ability to Preview and Edit Email Template Prior to Sending  
All Emails are now logged CRM<sup>10</sup> by default unless 'Create Log' is Unchecked

## Legend of Recruitment Process Enhancements & Dynamic Email Templates

1	<b>Dynamic Email Template Selection</b> email template will pre-populate accordingly to recruitment stage and applied office <sup>11</sup>
2	<b>Send SMS</b> Now include SMS Templates and automatically logged in CRM
3	<b>Edit/Preview Email</b> option to preview, edit and manually send email where required
4	<b>Upload/View Resume</b> Previously applicant resume storage was only possible if uploaded at time of applicant or when applicant had received applicant portal access. This can now be attached to applicant file at any stage

## Dynamic SMS Templates

Similarly, Dynamic SMS Templates have also been improved

## Features of Dynamic SMS Templates include

1. SMS Templates are now available anywhere the system offers SMS functionality, including each stage of the recruitment dashboard

---

<sup>10</sup> provided this module is included in your EntireHR subscription

<sup>11</sup> Please note: if **multiple email templates are set for office and / or recruitment stage** this will not be auto-populated and email template must be chosen prior to confirming applicant progression.

# EntireHR

2. All SMS are now logged CRM<sup>12</sup> by default unless 'Create Log' is Unchecked

## Applicant Portal & Recruitment Customisation

By Industry and / or Qualification

Main Masters	Member Master	Client Master	Allocation Master	Placements Master
<ul style="list-style-type: none"> <li>Documents</li> <li>Document Check &amp; Notification</li> <li>Qualification Groups</li> <li><b>Qualifications / Classifications</b></li> <li>Expertise</li> <li>Pay Level / Grades</li> <li>Superannuation</li> <li>Tax Codes</li> <li>Company Policies</li> </ul>	<ul style="list-style-type: none"> <li>Screening Guidelines</li> <li>Interview Guidelines</li> <li><b>Competencies / Interview Questions</b></li> <li>Job Application Information</li> <li><b>Applicant Portal Welcome Page</b></li> <li>Years Of Experience</li> <li>External Softwares Integration</li> <li>Education</li> <li><b>Evaluation</b></li> </ul>	<ul style="list-style-type: none"> <li>Experience Details</li> <li>Immunization</li> <li>Payment Type</li> <li>Professional Status</li> <li>Recruitment, Areas Of Interest</li> <li><b>Customize Recruitment Stages</b></li> <li><b>Customize Applicant Portal Menus</b></li> </ul>		

Pathway>Masters>Member Masters

Legend of Recruitment Process Enhancements & Dynamic Email Templates	
<input type="checkbox"/>	<p><b>Applicant Portal</b></p> <p>Applicant portal options can be customised in these areas</p>
<input type="checkbox"/>	<p><b>Internal Recruitment</b></p> <p>Internal recruitment workflows can be customised in these areas</p>
<input type="checkbox"/>	<p><b>Applicant Portal + Internal Recruitment</b></p> <p>Applicant Portal + Internal Recruitment can be customised in these areas</p>

<sup>12</sup> provided this module is included in your EntireHR subscription

# EntireHR

Summary of EntireHR Masters/Applicant and Recruitment Customisation				
EntireHR Portal	Masters Section	Area Customised	Can be Customised by Industry	Can be Customised by Qualification
Applicant Portal	Applicant Portal Welcome Page	Display + Text Shown on Home Page	No	No
Applicant Portal	Customise Home Page Recruitment Stages	List of Recruitment Stages + Mandatory Sections on Home Page	No	No
Applicant Portal + Internal Recruitment	Customise Applicant Portal Menus	<b>Mandatory/Non-Mandatory Recruitment Stages Set</b> Applicant Tabs Displayed or Hidden/Instructions + Information Provided	No	No
Applicant Portal + Internal Recruitment	Competencies / Interview Questions	Competencies on Applicant Portal / Competency Details (Reviewed at Interview)	Yes	Yes
Internal Recruitment	Screening Guidelines	Recruitment Dashboard>Screen and Assign Pop Up <i>Inbox/Left Message/Callback</i>	Yes	No
Internal Recruitment	Interview Guidelines	Member Profile>Recruitment>Interview Tab <i>Face to Face Interview</i>	Yes	No

# EntireHR

## Customise Recruitment Stages

### Mandatory/Non-Mandatory

Home \ Applications \ Incomplete Applications \ Member Menu \ Recruitment

Recruitment Help X

Applicant Name : SANKAR PRABHU | Applicant Qualification : LABOURER

Verification Interview Evaluation References Appointment

Onboarding Stages Status

Recruitment Stages	Mandatory	Status
Personal Details	Yes	Completed
Education	Yes	Not Completed
Health	Yes	Not Completed
Training	Yes	Not Completed
Legal Check Details	Yes	Not Completed
Children Permit	Yes	Not Completed
Competencies	Yes	Not Completed
Tax Information	Yes	Not Completed
Superannuation Fund	Yes	Not Completed
Policies	Yes	Not Completed
Documents	Yes	Not Completed
Identity Verification	Yes	Not Completed
Pay Level Verification	Yes	Not Completed
Registration	Yes	Not Completed

Application Status: INTERVIEW Email Template: APPLICANT INTERVIEW - PENRITH  Auto Email

Deferred To:

[Go to Personnel Card](#) [Save & Exit](#)

### Previous Functionality

Previously the final tab in Recruitment (Appointment) displayed Mandatory, Optional and Preferred stages. Additionally, those stages listed as 'Mandatory' were not enforced and could still be overridden by internal recruiter.

### New Functionality

Enterprise reduces this list of stages to only those listed as Mandatory, and these cannot be overridden. Accordingly, all stages must have data entered by either Applicant or Internal Recruiter prior to being able to activated as a member.

If required, these 'Mandatory' requirements may be altered via  
*Pathway: Masters>Member Masters>Customise Recruitment Stages*

# EntireHR

## Electronic TFN Declaration<sup>13</sup>

Enterprise introduces Paperless TFN Declarations! Applicant or Member may complete their TFN Declaration via the Online Portal.

Depending on your company requirements, there are three Flag Programs within the new Electronic TFN Module which can be utilised.

- **Flag Program One**

Electronic TFN Declaration

- **Flag Program Two**

Tax Scale Visible on Applicant Portal<sup>14</sup>

- **Flag Program Three**

Applicants or Members working as subcontractors may alternatively<sup>15</sup> enter ABN details via their online portal

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<sup>13</sup> Depending on company and member requirements, applicants or members working as subcontractors may also enter ABN details via their online portal.

<sup>14</sup> This will still be reviewed prior to ATO Submission.



## TFN Declaration Form<sup>16</sup>

Home Personal Big Party Time Health Training Registration Competencies References Finance Policies Documents Resources

Finance

Please update your correct Taxation, Banking, Superannuation & Payslips details. [Read more...](#)

**1. Tax Information**

Please declare your Tax Details below by choosing the correct option applicable to you.

Declare Tax File Number  OR Declare Australian Business Number

Current Declaration Status: **PENDING FOR DECLARATION**

### Important to Note:

**Financial Details**

**Tax File Number Declaration**

**File number Declaration (Please answer all the mandatory questions marked with \*)**

Information you provide in this declaration will allow us to work out how much tax to withhold from payments made to you. Providing the wrong information may lead to incorrect amounts of tax being withheld from payments made to you.

1) What is your Tax File Number (TFN)?\*

OR I have made a separate application / enquiry to the ATO for a new or existing TFN.

OR I am claiming an exemption because I am in receipt of a pension, benefit or allowance.

2) What is your name?

3) What is your home address in Australia?

4) If you have changed your name since you last dealt with the ATO, provide your previous family name.

5) What is your date of birth?

6) On what basis are you paid? (Select only one)

7) Are you: (Select only one) \*

8) Do you want to claim the tax-free threshold from this payer? Only claim the tax-free threshold from one payer at a time, unless your total income from all sources for the financial year will be less than the tax-free threshold. \*

9) (a) Do you have a higher education Loan Program (HELP)? \*

(b) Do you have a Financial Supplement Debt? \*

Title:  First Name:  Last Name:

Street Address:

Suburb:  State:

Title:  First Name:  Last Name:

Full Time  Part Time  Casual

An Australian resident for tax purposes

A Foreign resident for tax purposes

A Working Holiday Maker

Yes  No  Answer no here if you are a foreign resident or working holiday maker, except if you are a foreign resident in receipt of an Australian Government pension or allowance.

Yes  No

Yes  No

Declaration by Payee: I declare that the information I have given is true and correct.

Selecting  will create TFN Number **11111111**

Selecting  will create TFN Number **44444444**

These options will be further explained in the following section - *Recruitment Dashboard>TFN Declaration*

Questions 2, 3 & 5 will be auto-populated according to the information applicant entered at time of application.

Question 7 & Question 8 are linked:

Selecting  will allow either option to be selected in Q8

Selecting  will select **No** for Q8

Selecting **Submit Declaration** will progress the Declaration to TFN Declarations on Recruitment Dashboard for Internal Staff to Review and Submit to ATO

# EntireHR

- Member cannot change/transfer from TFN to ABN or vice versa. A new member file must be created to record alternate details.
- If company has multiple ABN's: electronic TFN may be utilized for only one (nominated in finance settings). Alternate ABN's must be completed manually with TFN export report available to capture this data.
- Applicant or Member must CANCEL and re-submit their TFN Declaration if they wish to make changes once submitted<sup>17</sup>.

## TFN Declaration Verification and Submission to ATO<sup>18</sup>

Internal Staff may access all applicant and members completed TFN Declaration via the Recruitment Dashboard.

Home \ Applications \ Miscellaneous \ TFN Declaration Details

Status: 3 Status Selected

First Name	Last Name	ID	Status	Application Status	Declaration Status	TFN Number	Declared By / On	TFN Not Supplied?	# of grace days left	Current Tax Scale
ABHISHEK	SACHAN	3798048	ACTIVE	ACCEPT	DECLARED BY PAYEE	11111111	ABHISHEK 30/01/2019 4:12PM	YES	-83	Scale 2 - Tax Free Obligations
AH	LK	3798027	ACTIVE	ACCEPT	REDECLARED BY PAYEE	11111111	AH09/02/2019 3:59PM	YES	-48	Scale 2 - Tax Free Obligations
ALFRED	MATHER	323730	ACTIVE	ACCEPT	REDECLARED BY PAYEE	182714145	ALFRED 01/02/2019 7:42PM			Scale 5 - No TFN by Non Resident Ob...
ALLEN	WILLIS	3798030	ACTIVE	ACCEPT	DECLARED BY PAYEE	988847764	ALLEN 17/01/2019 11:51PM			Scale 2 - Tax Free Obligations
ALYCIA LEIGH	POWELL	352540	ACTIVE	ACCEPT	DECLARED BY PAYEE	444444444	ALYCIA LEIGH 19/01/2019 1:29AM			Scale 2 - Tax Free Obligations
AMANDA RAE	CASHION	267030	ACTIVE	ACCEPT	REDECLARED BY PAYEE	444444444	AMANDA RAE 13/02/2019 10:31PM			Scale 2 - Tax Free Obligations
ANDREW JOSEPH	COX	323575	ACTIVE	ACCEPT	REDECLARED BY PAYEE	131440112	ANDREW JOSEPH 01/02/2019 11:14PM			Scale 2 - Tax Free Obligations
ANKIT	RAWAT		NEW	INTERVIEW	DECLARED BY PAYEE	444444444	ANKIT 20/03/2019 11:23PM			Scale 2 - Tax Free Obligations
BRAD DAVID	RYAN	373035	ACTIVE	ACCEPT	REDECLARED BY PAYEE	630294716	BRAD DAVID 11/02/2019 7:17PM			Scale 2 - Tax Free Obligations
BRENT	SHEAHAN		NEW	INTERVIEW	DECLARED BY PAYEE	11111111	BRENT 17/01/2019 3:42PM	YES	-70	Scale 2 - Tax Free Obligations
BRODIE JAMES	DAWE		NEW	INTERVIEW	DECLARED BY PAYEE	434733893	BRODIE JAMES 22/02/2019 5:12PM			
BURLEYSSSSSSSSSS	CHRISSSSSSSSSSS		NEW	INTERVIEW	REDECLARED BY PAYEE	11111111	BURLEYSSSSSSSSSSSSSSSSSSSS 06/03/2019 ...	YES	-32	
CAROLINE KIM	MACDONALD	362370	ACTIVE	ACCEPT	REDECLARED BY PAYEE	588422085	CAROLINE KIM 16/02/2019 8:51PM			WORKERS HOLIDAY MAKER SCALE

1 - 45 of 45 items

Row will turn red to indicate 'grace' period has lapsed

Selecting applicant name will open TFN declaration via Single Touch Payroll for internal staff to review and verify for ATO

Applicants' or Members' with 11111111 44444444 have been allocated a generic TFN number (exemption code) according to the option they nominated instead of providing their TFN Number.  
This allows them to be processed for payroll in the absence of their TFN

The system allocates these numbers a set 'grace' period (in accordance with the ATO criteria).  
If this has not been updated within the 'grace' period - applicant or member will be taxed accordingly (at the highest threshold)

Pathway: Recruitment Dashboard > TFN Declarations

<sup>17</sup> Applicant or Member may only cancel their TFN Declaration prior to it's verification by internal staff. Once internal staff have reviewed and submitted their declaration to the ATO - applicant or member must RE-DECLARE.

<sup>18</sup> Please note: this is a flag program. Program may be made active or inactive according to company requirements.

# EntireHR

All TFN declarations displayed here are pending **Tax Scale selection** and / or **Review & Verification** by internal staff prior to being processed for payroll and / or submitted to the ATO.

## TFN Declaration via Single Touch Payroll

TFN Declaration Via Single Touch Payroll ✕

Member Name : ABHISHEK BACHAN | Member Qualification : FORKLIFTOP

Section A : To be completed by the PAYEE

Status : **DECLARED BY PAYEE** Tax Scale Pending Click here to View Applicant Details

Section B : To be completed by PAYER

Full Name of the person making the declaration:

Payee Tax Scale:

**DECLARATION by payer**  
I declare that the information I have given is true and correct.

Signature of payer

Clear Date: 02/07/2019

Submit Declaration to ATO

**Tax File Number Declaration Action Details Log**

Date	Time	Seq	Status	TFN Number	Action Details
01/24/2019	16:12	1	DECLARED BY PAYEE	111111111	DECLARED BY PAYEE

**Tax File Number Declaration archive record(s) log**

Seq	Status	First Name	Family Name	TFN	Resident?	Foreign?	WHM?	Help?	SFSS?	By/On	STP ID
No records to display.											

### Internal Staff Member must

1. Select name in dropdown list next to Full Name of Person making the Declaration
2. Select and / or Review Payee Tax Scale
3. Electronically Sign
4. Select **Submit Declaration to ATO**

# EntireHR

## Visa Functionality Enhancement

**Visa Details**

*Non-Residents are required to complete visa information*

Non-Resident

Visa Name \*

**Visa Subclass**

Visa Number

Working Hrs Limit \*

Date of grant Date Month Year

Date of Expiry\* Date Month Year

Visa Conditions

Upcoming Hours Limit Exclusion Period From: DD-MM-YYYY To: DD-MM-YYYY

Passport Number\*

Passport Country\*

Passport Expiry Date Date Month Year

The first of several exciting changes for EntireHR's capacity to record, storage and tracking of Visa's – Enterprise introduces a new field for Visa's called **Visa Subclass**.

This enables internal staff to record, store and track Visa's with more accuracy than ever before.

## Visa Fortnightly

Enterprise introduces Fortnightly Visa Tracking! One of EntireHR's most intuitive programs to date – if this flag program is on (set in EntireHR Finance>Global Preferences) all members will be restricted to 40 hours a fortnight.

This program will cross reference member's accumulated worked hours over the previous week, current week, and following week to establish remaining visa hours member is applicable to work.

Accordingly, Working Hours Limit will only register no. of hours greater than 40 (i.e. 60 hours) and may be utilised to allow members to work additional hours where applicable (i.e. members with unlimited visa, exclusion periods etc.)

# EntireHR

## Online References

Enterprise introduces Online References! This module has been developed to allow the user complete customization for References end to end including Members requiring new referees.

Accordingly, several settings need to be set in Masters' prior to utilizing this module.

### Referee Check Settings (Masters)

The screenshot shows the 'Referee Check Settings' form with the following fields and callouts:

- Minimum Number of Valid Referee's per Candidate:** A text input field containing '1'. A red callout box states: "This is the minimum amount of references that an applicant can complete before progressing to next stage of Recruitment".
- Referee Validity Period (In Days):** A dropdown menu showing '90'. A green callout box states: "Once a reference is status is **COMPLETED** an member will be prompted to provide a new reference based on the day range set here and the message enteref below".
- Invalid Referee Message to Candidate to submit new referee's from their Interface \*:** A text area containing a message template starting with "Dear member,". A green callout box points to this field.
- Notification Options:** Two checkboxes are checked: "Notify Referee via sms" and "Notify Referee via email". Each has a dropdown menu set to "NOTIFICATION TO REFEREE". A yellow callout box states: "These SMS and Email templates can be customised in Masters settings. When message is generated, a unique link is sent allowing referee to access cusotmised reference form".
- Mandatory Fields:** Two unchecked checkboxes: "Referee Contact # is mandatory" and "Referee Email is mandatory". A purple callout box for the first states: "Referee Contact # is Mandatory If ticked, Applicant/Member MUST provide a Contact Number for". A green callout box for the second states: "Referee Email is Mandatory If ticked, Applicant/Member MUST provide an Email Address for".
- Additional Callouts:** A blue callout box on the left states: "If ticked, a SMS or Email will be automatically sent to the reference as soon as referee details have been 'created' by the applicant or member." A green callout box at the bottom left states: "Referee Email is Mandatory If ticked, Applicant/Member MUST provide an Email Address for".

### Referee Qualification (Masters)

Referee's can often be different qualifications from applicants or members they are providing a reference for. Accordingly, qualifications must be entered for referees.

Pathway>Masters>Main Masters>Referee Qualification

# EntireHR

## Referee Job Position (Masters)

Referee's can often be different positions from applicants or members they are providing a reference for. Accordingly, if applicable job position may be entered for referees.

*Pathway>Masters>Placement Master>Job Position*

## Customise Referee Form

Customize Referee Form

Choose Industry for which you would like to create / edit referee form: ENTIRE

Referee Check

You have been nominated as a referee and it would be greatly appreciated if you could comment on the following items & submit the details to us.

Applicant Name:  Referee Name:

Referee Position:  Referee Email:

Referee Contact:  SHOW Referee Organization:  SHOW

Please answer the below Questionnaire to the best of your knowledge for us to evaluate the applicant for the position applied.

To Add, please drag and drop the control from the Right Panel

Standard Fields

- H Heading
- Textbox
- Dropdown
- Checkbox

Any Other Comments. SHOW

Signed. SHOW

Submit Details Form Preview

*Pathway>Masters>Main Masters>Customise Referee Form*

# EntireHR

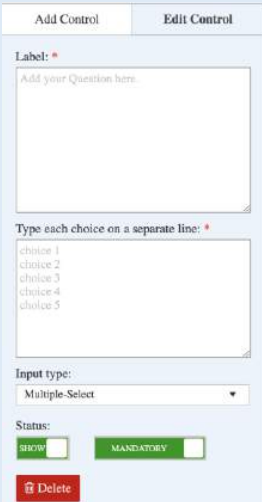

Legend of Customisations of Enterprise New References Module	
	<b>Industry Selection</b>
1	<p style="text-align: center;"><u>Applicant References</u></p> <p>Referees' will receive reference template according to the applicants' nominated industry at time Applicant Login Details are provided.</p>
1	<p style="text-align: center;"><u>Members References</u></p> <p>Referees' will receive reference template according to members' industry.</p> <p><i>Please note: if a template has not been set up for an industry – system will send global template.</i></p>
2	<b>Edit Text</b>
	<p>Anywhere the pencil is visible, the text can be edited.</p>
3	<b>Referee and References Details</b>
	<p>These are loaded by default when the reference opens the template; according to the information entered by applicant at time of editing reference.</p>
4	<b>Add Control</b>
	<p>New Headings/Questions can be added by double-clicking here.</p> <p>All Options must be dragged into blank space on the left hand side to be included in form and edited.</p>
5	<b>Heading</b>
	<p>Headings can be used to categorise questions for specific qualifications.</p>

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	<div data-bbox="657 212 1075 790"><p>Add Control Edit Control</p><p>Label: *</p><p>Heading</p><p>Qualification</p><p>Select Qualification</p><p>Status:</p><p>SHOW</p><p>Delete</p></div>
<div data-bbox="225 1111 280 1167">6</div>	<p data-bbox="699 853 1031 887"><b>Question Type - Textbox</b></p> <p data-bbox="331 943 1326 1021">Various answer responses are available including: Text, Multi-Line, Number, Email, Date</p> <div data-bbox="657 1066 984 1503"><p>Add Control Edit Control</p><p>Label: *</p><p>Add your Question here.</p><p>Input type:</p><p>Date</p><p>Status:</p><p>SHOW MANDATORY</p><p>Delete</p></div>
<div data-bbox="225 1581 280 1637">7</div>	<p data-bbox="687 1603 1043 1637"><b>Question Type: Dropdown</b></p> <p data-bbox="592 1648 1142 1682">Custom dropdown options can be created</p>



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<p style="text-align: center;"><b>8</b></p>	<p style="text-align: center;"><b>Question Type: Checkbox</b> Custom Checkboxes can be created with Single or Multi Select available</p> 

## Important to Note:

- **Data Storage Requirements**
  - i. Items/questions cannot be deleted once they have been answered by a reference (as this would change the question on all previous reference forms).
  - ii. To be 'removed' from reference form question must be changed to 'Optional' and 'Hide'.

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## Recruitment Dashboard (References Pending)

REFERENCE PENDING (56) 
ADELAIDE (5)
CANBERRA (1)
COFFS HARBOUR (16)
GEELONG (1)
GRAFTON (7)
LISMORE (5)
NEWCASTLE (7)
PENRITH (10)
QUEENSLAND (2)
TUGGERAH (2)

### Awaiting Reference(s) Check

These applicants are missing at least one reference check and a recruiter has flagged this as mandatory before proceeding. Go to their **Profile > Recruitment > References** to view, contact and update the outstanding reference(s).

BLAKE THOMSON (9)

### Previous Functionality

#### Existing Applicants with References Pending

Existing applicants in References Pending stage prior to Enterprise migration will be accessible in a link in the footer called *Old References*.

Here, References can be viewed in the old format and 'Save and Continue' may be selected to transition applicant from pending to complete.

## Existing Members with References in Previous Format

Home \ Applications \ Incomplete Applications \ Member Menu \ Recruitment

Recruitment Help X

Member Name : AMANDA GRAMLICK | Member Qualification : AIN

Verification Interview Evaluation **References** Appointment

	Add Referee1 Details	Add Referee2 Details	Add Referee3 Details
Referee name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Qualification	Select Qualification	Select Qualification	Select Qualification
Position	<input type="text"/>	<input type="text"/>	<input type="text"/>
Place & Length of time worked with candidate	<input type="text"/> 500 characters left	<input type="text"/> 500 characters left	<input type="text"/> 500 characters left
Contact Email (Exa. abc@xyz.net.au)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Work Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact Log	<input type="text"/> (Max 500 Chars)	<input type="text"/> (Max 500 Chars)	<input type="text"/> (Max 500 Chars)
Create Follow up	Due Date DD-MM-YYYY Due Time Create MSG Task	Due Date DD-MM-YYYY Due Time Create MSG Task	Due Date DD-MM-YYYY Due Time Create MSG Task
Referee willing to assist with reference	Yes No Reference Not Required	Yes No Reference Not Required	Yes No Reference Not Required
Referee recommendation on employment application	Yes No	Yes No	Yes No

Similarly, existing members previous references can be viewed under Member Profile>Recruitment>References. EntireHR recommend utilising the new references module following it's release, however the old references functionality will continue to operate if this method is preferred.

### New References Functionality

Online References features include:

- tracking of applicant or members references at any stage
- instantaneous notifications to referees once nominated by applicant<sup>19</sup>
- customised reference forms based on industry and qualification specific requirements<sup>20</sup>
- references completion updated in real-time and is visible to applicant and internal staff

<sup>19</sup> If activated in Masters Settings

<sup>20</sup> If activated in Masters Settings

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- expiry of outdated references
- bulk customisable email reminders

## Create Referee

**Create Referee Window**  
\* denotes mandatory fields

Name \*

Qualification

Position

Organisation Name

Length of Time Worked

Contact Email

Contact Numbers: \*  
(Any one number is Mandatory)

Work

0404651111

0123654789

Reference Contact Priority

WAITING

Created by / on

Updated by / on

### Important to Note:

- Minimum number of fields have been flagged as mandatory to reduce possibility that an applicant (or member) will enter inaccurate contact details.

## References Pending

### Reference Pending



ACCEPT x INTERVIEW x Go

Search any text from the below listed Details  Search on: Search Referee Name from across database Go

3 4 5  
[Send Feedback Reminder](#) [Send Email](#) [Send SMS](#)

#### List of Pending Referee's

<input type="checkbox"/>	REFEREE NAME	APPLICANT/MEMBER NAME	PRIORITY	POSITION	STATUS	CONTACT EMAIL	CONTACT #	LAST ACTIVITY
<input type="checkbox"/>	Applicant Referee 1	CHRISTINE MANEVSKI	High	Construction Positi...	WAITING	ankit@entiresoftware.com	8512051833	28/03/2019 19:35
<input type="checkbox"/>	Applicant Referee 2	CHRISTINE MANEVSKI	High		WAITING	ankit@entiresoftware.com	098653425436767,8512051833,09...	28/03/2019 19:35
<input type="checkbox"/>	Applicant Referee 3	TIMOTHY FOLKES	High	Construction Positi...	WAITING	ankit@entiresoftware.com	098678765455,8512051833	04/03/2019 16:11
<input type="checkbox"/>	Ava Sharpe	EMMA THOMSON	High		WAITING	ankit@entiresoftware.com	8512051833	25/04/2019 16:38
<input type="checkbox"/>	Barney Stinson	ABHISHEK BACHAN	Medium	MANAGER	WAITING	ankit@entiresoftware.com	8512051833,0123654789	25/04/2019 16:33
<input type="checkbox"/>	Claire Fraser	STEPHEN GEERIN	High	Construction Positi...	WAITING	ankit@entiresoftware.com	8512051833	25/04/2019 16:34
<input type="checkbox"/>	Felicity Smoak	PHILLIP GIBSON	High	MANAGER	WAITING	rajm@entiresoftware.com	8512051833,0459318081	25/04/2019 16:30
<input type="checkbox"/>	Harry Potter	CHRISTOPHER GALEA	High	Construction Positi...	WAITING	ankit@entiresoftware.com	8512051833	25/04/2019 16:40
<input type="checkbox"/>	Hermione Granger	CUONG NGO	High	Construction Positi...	WAITING	ankit@entiresoftware.com	8512051833	25/04/2019 16:41
<input type="checkbox"/>	Jack Daniels	JAROD BAKER	High	Construction Positi...	WAITING	ankit@entiresoftware.com	9643508812,8512051833	25/04/2019 16:35
<input type="checkbox"/>	Jamie Fraser	BEV PARROTT	High	Marketing	WAITING	ankit@entiresoftware.com	8512051833	25/04/2019 16:33
<input type="checkbox"/>	Joe Root	THOMAS KELLY	Low	MANAGER	WAITING	ankit@entiresoftware.com	0979687576,8512051833	04/03/2019 16:11
<input type="checkbox"/>	John Barbs	TIARA NISCHAL	High	SUPERVISOR	WAITING	ankit@entiresoftware.com	8512051833,0123654789	25/04/2019 16:29
<input type="checkbox"/>	John Diggle	ABHISHEK BACHAN			WAITING	ankit@entiresoftware.com	8512051833,0123654789	25/04/2019 16:32
<input type="checkbox"/>	Karen Walker	THOMAS KELLY	High	Registered Nurse	WAITING	ankit@entiresoftware.com	8512051833	25/04/2019 16:33
<input type="checkbox"/>	Member Referee 1	CHRIS DAWE	High	Construction Positi...	WAITING	ankit@entiresoftware.com	8512051833	16/02/2019 18:57
<input type="checkbox"/>	Member Referee 1	AMANAKI UNUFE	High	Construction Positi...	WAITING	ankit@entiresoftware.com	099876532324,8512051833	18/02/2019 22:15
<input type="checkbox"/>	Mia Smoak	STEPHEN GEERIN	Medium	Construction Positi...	WAITING	ankit@entiresoftware.com	9643508812,8512051833,9643508...	25/04/2019 16:36
<input type="checkbox"/>	Naresh Singh	DONNA MARIE COLLINS	High	SUPERVISOR	WAITING	ankit@entiresoftware.com	8512051833,9876543210	04/03/2019 16:11

### Legend for Recruitment Dashboard - References Pending

<b>1</b>	<p style="text-align: center;"><b>Referee Name</b></p> <p>Selecting referee name will show pop-up of referee details for internal staff to alter if required/change to inactive if reference is unsatisfactory</p>
<b>2</b>	<p style="text-align: center;"><b>Applicant/Member Name</b></p> <p>Selecting these will show applicant or members complete list of references (visual available on subsequent page)</p>
<b>3</b>	<p style="text-align: center;"><b>Send Feedback Reminder</b></p> <p>This will send email with hyperlink to reference form for referee to complete</p>

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4	<b>Send Email</b> customised email may be sent via this option
5	<b>Send SMS</b> Customised SMS may be sent via this option

## View of Applicant / Members References Details

**Create / Edit Referee(s)**

Applicant Name: STEPHEN GEERIN      Applicant Id: APL0000891

Please nominate referee's with whom you have worked or trained with, within the role you are applying.

**Exsiting Referee's Details**

NO.	REFeree NAME	PRIORITY	POSITION	CONTACT S...	LAST ACTIVITY LOG	NOTIFY/FEEDBACK	SUBMIT ON BEHALF OF ...	STAFF COMMENTS	DELETE
1	<a href="#">Akshay Kumar</a>	High	Construction Positi...	COMPLETE	22/02/2019 20:17	<a href="#">View Feedback</a>	<a href="#">Regenerate Feedback</a>	<a href="#">Comment</a>	
2	<a href="#">Amitabh</a>	High	Construction Positi...	INACTIVE	08/03/2019 22:13	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	
3	<a href="#">Claire Fraser</a>	High	Construction Positi...	WAITING	25/04/2019 16:34	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	
4	<a href="#">Mia Smoak</a>	Medium	Construction Positi...	WAITING	25/04/2019 16:36	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	
5	<a href="#">Niket</a>		Construction Positi...	COMPLETE	16/02/2019 17:58	<a href="#">View Feedback</a>	<a href="#">Regenerate Feedback</a>	<a href="#">Comment</a>	
6	<a href="#">Rahul Singh</a>			WAITING	04/03/2019 16:11	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	
7	<a href="#">Bawat</a>	High	Construction Positi...	COMPLETE	04/02/2019 20:37	<a href="#">View Feedback</a>	<a href="#">Regenerate Feedback</a>	<a href="#">Comment</a>	
8	<a href="#">Referee by Staff</a>	High	Construction Positi...	NEW	04/03/2019 16:11	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	✘
9	<a href="#">BBB</a>		Construction Position	NEW	04/03/2019 16:11	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	✘
10	<a href="#">U Test</a>		Construction Positi...	WAITING	04/03/2019 16:11	<a href="#">Notify Referee</a>	<a href="#">Submit Feedback</a>	<a href="#">Comment</a>	

**Important Instructions:-**

Click on underlined words for more details.

[Notify Referee](#) means sending Referee Submission URL again.

[Submit Feedback](#) means Internal Staff can submit Referee Feedback Manually.

[Comments](#) means Internal staff can write their comments per referee.

applicant or member may be marked as completed once minimum number of References are COMPLETE

designed for internal staff to record comments against reference provided - if there are notes entered Comment will show in green

referee may be deleted by applicant, member or internal staff prior to being sent request via email / sms for feedback.

Alternatively, once request for feedback has been sent referee may be deactivated

## Legend for Contact Status of Reference

### NEW

Referee has not yet been sent notified by SMS or email of nomination

### WAITING

Referee has been notified by email and/or SMS of request to complete reference

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## COMPLETE

Reference has been completed by referee or internal staff on behalf of referee

## INACTIVE

Referee was made inactive by internal staff due to no response/does not met company requirements for reference

## Apps

### Introducing Member Wear App!

Watch App now available for Android and Apple Watch Users!

- Users will now be able to receive and *respond* to push notifications straight from their smart watches; including
  - i. ability to view shift details, and accept/decline/acknowledge cancellation right from their wrist!
  - ii. If Client compliance is required member will be defer back to app with notification to acknowledge compliances via phone

### Staff App (Android)

- CRM Integration<sup>21</sup>
  - i. Including Check In and Check Out functionality
- Multi-timesheet submission<sup>22</sup>
  - i. Internal staff will now have the ability to submit all timesheets for a member for the week at once.
- Ability to view all existing clients

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<sup>21</sup> This functionality is already available in iPhone Staff App

<sup>22</sup> Only available in Android App – iPhone users will have single timesheet submission

# EntireHR

## Client Compliance Module

### **Introducing Client Compliance**

This module is available in Professional Version 8.10 onwards.

The client compliance program was an extensive development within EntireHR, to address the exponential increase in client compliance requirements for agency staffing. The aim of this program was to simultaneously increase member awareness and acknowledgement of compliances and reduce the potential for human error due to increasingly complex manual checks by internal staff.

### **This program has been integrated across the following platforms:**

- Staff Web Portal
- Member App

### **For every booking - specific client requirements can be recorded, tracked and reported by:**

- Service location and / or Delivery Location
- Qualification
- Expertise
- Training Records
- Health Records

These compliances will show to members in real-time via their apps prior to accepting a shift. Members who meet the client compliance criteria will be immediately eligible to accept, those who don't will be able to view, acknowledge and/or submit the relevant documentation for verification and considered for future work opportunities at that site.



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Importantly, this feature will not inhibit members ability to view bookings but will prevent them from accepting the shift if non-compliant.

**All Documentation Outlined Below is accessible via EntireHR Helpsite; detailing Client Compliance Implementation, Set Up, and Operations.**

**Client Compliance Set Up and Implementation - [Client Compliance Protocols.pdf](#)**

This is the technical breakdown of the set up of this program. This outlines the purpose and recommended application of the program. Additionally, it addresses the alternative options and methods, system loopholes, no-no's and recommended guidelines for activating, altering or deactivating compliances.

**Client Compliance: Default Scripts - [Client Compliance Default Scripts.pdf](#)**

Set Up includes completely customisable fields for all client compliances - however these templates have created for those clients who prefer uniform structure across the system.

**Client Compliance Overview: User Operations Guide - [Client Compliance Overview.pdf](#)**

This is an comprehensive guide for internal users (staff) to understand the functionality, operation and utilisation of client compliance.

**Client Compliance: Member App Guide - [EntireHR Member App Client Compliances Only.pdf](#)**

This is an comprehensive guide for external users (members) to understand the functionality, operation and utilisation of client compliance.