



EMPLOYEE SELF-SERVICE USER GUIDE

GETTING STARTED WITH hrHQ

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hrHQ OVERVIEW

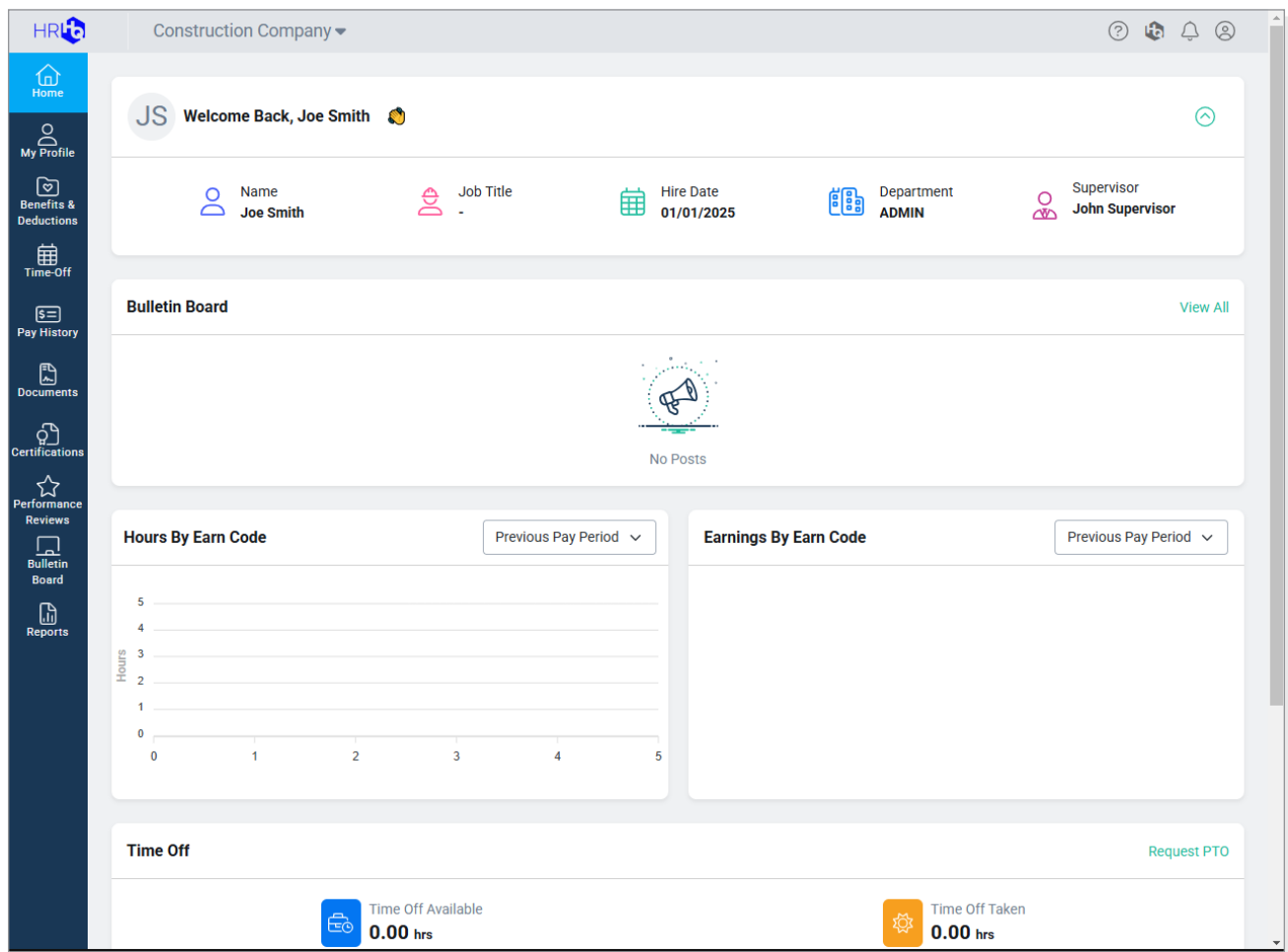
hrHQ is a standalone, web-based human capital management (HCM) application that can integrate with FOUNDATION®. With hrHQ employee self-service options, you can update your employee record, manage your time off, complete performance reviews, access reports, and view your company's latest updates.

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.

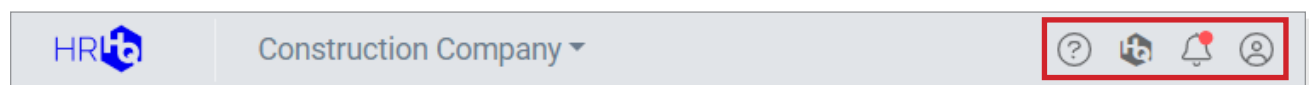
Time Off

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

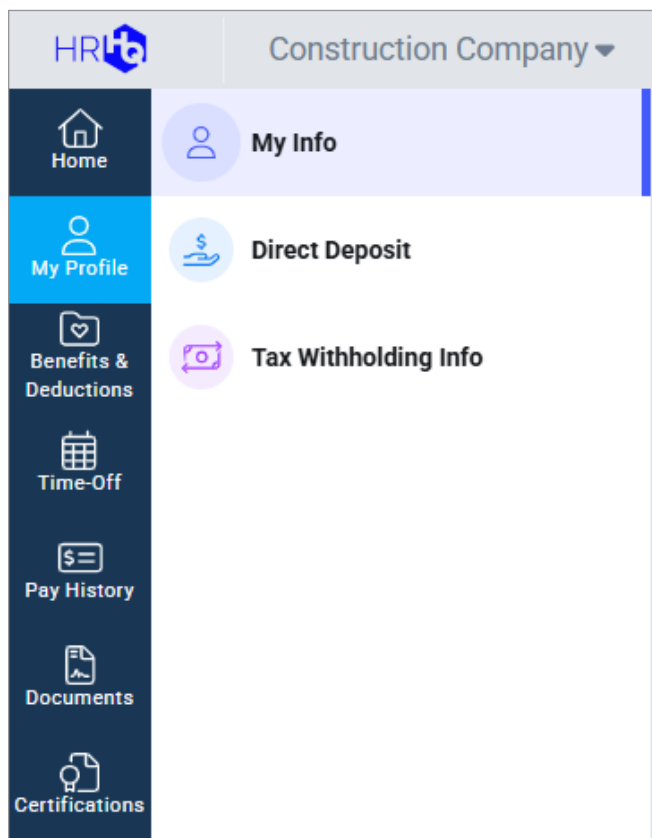
Clicking on “Auth. Preferences” opens the Authentication Preferences page. From this page you can set up or change your form of authentication. Options available are phone, email, and authenticator app.

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.


My Time Off


2024





REQUEST TIME OFF

Hours Available
0.00

Hours Taken
0.00

Hours Accrued
0.00

Hours Projected
0.00

Hours Approved
0.00

Dates

Plan Type

Total Hours



Status

Action


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


My Time Off


2024





REQUEST TIME OFF

Hours Available
0.00

Hours Taken
0.00

Hours Accrued
0.00

Hours Projected
0.00

Hours Approved
0.00

Dates

Plan Type

Total Hours

Status

Action

- 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.

hrHQ Construction Company

JS Joe Smith ACTIVE

My Info Direct Deposit Tax Withholding Info

Personal Employment Contacts EDIT

General

Name	Joe Smith
Gender	Male
Marital Status	-
Date of Birth	XX/XX/XXXX
SSN	XXX-XX-XXXX
Phone Number	(800) 811-5926
Login Email Address	support@foundationsoft.com
Notification Email Address	support@foundationsoft.com
Foundation Email Address	support@foundationsoft.com
Address	17800 Royalton Road Strongsville, OH 44136

Driver's License

License State	-
License Number	-
Expiration Date	-

EEO

Veteran	No
Nonresident Alien	No
Multiracial	No
Non-binary/transgender	No

Passport & Visa

Passport Information

Passport Number	-
Issued Date	-
Expiration Date	-

Visa Information

Visa Number	-
Issued Date	-
Expiration Date	-
Control Number	-
Visa Type/Class	-

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.

The screenshot shows the 'My Info' screen for Joe Smith. The left sidebar contains links for 'My Info', 'Direct Deposit', and 'Tax Withholding Info'. The main content area has three tabs: 'Personal' (highlighted with a red box), 'Employment', and 'Contacts'. An 'EDIT' button is in the top right. The 'Personal' tab is divided into two sections: 'General' and 'EEO'.

General	
Name	Joe Smith
Gender	Male
Marital Status	-
Date of Birth	XX/XX/XXXX
SSN	XXX-XX-XXXX
Phone Number	(800) 811-5926
Login Email Address	support@foundationsoft.com
Notification Email Address	support@foundationsoft.com

EEO	
Veteran	No
Nonresident Alien	No
Multiracial	No
Non-binary/transgender	No

“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.

This screenshot is identical to the previous one, but with a red circle highlighting the 'EDIT' button in the top right corner of the main content area.

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

My Info

Direct Deposit

Tax Withholding Info

3

SAVE

2

General

Prefix

First Name *

Middle Initial

Last Name *

Suffix

Gender *

Marital Status

Date of Birth *

SSN *

Phone Number *

Login Email Address *

Notification Email Address ⓘ

Foundation Email Address ⓘ

Joe

Smith

Male

01/01/2000

XXX-XX-XXXX

(800) 811-5926

support@foundationsoft.com

support@foundationsoft.com

support@foundationsoft.com

“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.

My Info

Direct Deposit

Tax Withholding Info

JS

Joe Smith

ACTIVE

Personal

Employment

Contacts

Employee Contacts

ADD CONTACT

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

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

My Info

Direct Deposit

Tax Withholding Info

Add Contact

CA 3 SAVE

Contact Name 2

Prefix

First Name *New

Middle Name

Last Name *Contact

Suffix

Contact Info

Relationship *Other

☐ Emergency Contact

☐ Dependent

☒ Beneficiary

Phone Number & Email Address

Email Address

Phone Number *

- 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.

My Info

Direct Deposit

Tax Withholding Info

JS Joe Smith

ACTIVE

Personal Employment Contacts

Employee Contacts

ADD CONTACT

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

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

My Info

Direct Deposit

Tax Withholding Info

CA

4

SAVE

3

Contact Name

Prefix

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

Direct Deposit

Tax Withholding Info

JS

Joe Smith

ACTIVE

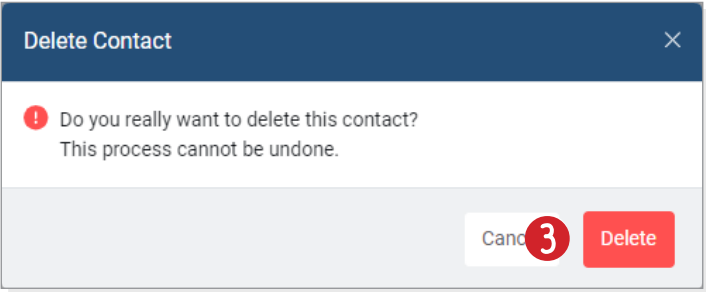
Personal Employment **Contacts**

Employee Contacts

ADD CONTACT

Contact Person	Relationship	Emergency...	Dependent	Beneficiary	Mobile	Actions
New Contact	Other	1		✓	(800) 246-080	2 <div><div></div><div>Delete</div></div>
Emergency Contact	Other	✓			(800) 246-080	

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.

My Info

Direct Deposit

Tax Withholding Info

Direct Deposit Accounts

ADD ACCOUNT

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.

My Info

Direct Deposit

Tax Withholding Info

Add Bank Account(s)

Deposit Order

Sequence

R

• Checking ****6789

ADD ACCOUNT

CANCEL

SUBMIT

Checking ****6789

EDIT

Status

• Active

Sequence

Remaining

Bank Account Type

Checking

Pre-note

Yes

Distribution Method

Remaining

Account Number

****6789

Routing Number

****1039

Voiced Check

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

4. Select [SAVE & DONE].

My Info

Direct Deposit

Tax Withholding Info

Add Bank Account(s)

Deposit Order

Sequence

1

• New Account

R

• Checking ****6789

CANCEL

New Account

Bank Account Type *

Checking

Distribution Method *

Percent of Remaining

Distribution Percentage *

25

%

Account Number *

****0101

Re-Enter Account Number *

****0101

Routing Number *

****2084

Voiced Check

UPLOAD

Description

SAVE & DONE

SAVE & NEW

5. Select [SUBMIT].

My Info

Direct Deposit

Tax Withholding Info

Add Bank Account(s)

Deposit Order

Sequence

1 • Checking *****0101

R • Checking *****6789

ADD ACCOUNT

CANCEL

5

SUBMIT

Checking *****0101

EDIT

Status

Active

Sequence

1

Bank Account Type

Checking

Pre-note

No

Distribution Method

Percent of Remaining

Distribution Percentage

25%

Account Number

*****0101

Routine Number

Editing Accounts

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

My Info	Direct Deposit Accounts						ADD ACCOUNT
Direct Deposit	Sequence	Bank Account Type	Account Number	Distribution Method	Distribution Amount	Actions	
Tax Withholding Info	1	Checking	*****0101	Percent of Remaining	25%	2	Edit
	Remaining	Checking	*****6789	Remaining	Remaining		

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

My Info

Direct Deposit

Tax Withholding Info

Add Bank Account(s)

Deposit Order

Sequence

1

•

Checking ****0101

R

•

Checking ****6789

ADD ACCOUNT

Edit Bank Account

Bank Account Type *

Checking

Status *

Active

Distribution Method *

Percent of Remaining

Distribution Percentage *

25

%

Account Number *

****0101

Re-Enter Account Number *

****0101

Routing Number *

****2084

VOIDED CHECK

UPLOAD

DESCRIPTION

CANCEL

SAVE

- 5. Select [SUBMIT].

My Info

Direct Deposit

Tax Withholding Info

Add Bank Account(s)

Deposit Order

Sequence

1

•

Checking *****0101

R

•

Checking ****6789

ADD ACCOUNT

Checking *****0101

EDIT

Status

• Active

Sequence

1

Bank Account Type

Checking

Pre-note

No

Distribution Method

Percent of Remaining

Distribution Percentage

25%

Account Number


*****0101

ROUTING NUMBER

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 the 'Direct Deposit Accounts' section. On the left, there is a sidebar with 'My Info', 'Direct Deposit', and 'Tax Withholding Info'. The 'Direct Deposit' section is active. The main area displays a table of direct deposit accounts. The table has columns: Sequence, Bank Account Type, Account Number, Distribution Method, Distribution Amount, and Actions. The first row shows Sequence 1, Checking account type, Account Number ****0101, Distribution Method Percent of Remaining, and Distribution Amount 25%. The 'Actions' column for this row contains an 'Edit' button, which is highlighted with a red box and a red circle with the number 2. A red circle with the number 1 is placed over the Account Number ****0101.

Sequence	Bank Account Type	Account Number	Distribution Method	Distribution Amount	Actions
1	Checking	****0101	Percent of Remaining	25%	
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 the 'Add Bank Account(s)' dialog box. It has two main sections: 'Deposit Order' and 'Edit Bank Account'. The 'Deposit Order' section shows a list of accounts. The first account is Sequence 1, Checking account type, Account Number ****0101. A red box and a red circle with the number 3 highlight the delete icon (a trash can) next to this account. The 'Edit Bank Account' section shows fields for 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 a 'Voided Check' section with an 'UPLOAD' button.

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

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. It has a title bar with 'Delete Account' and a close button. The main area contains a red exclamation mark 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'. The 'Delete' button is highlighted with a red circle and the number 4.

Delete Account

Do you really want to delete this account?
This process cannot be undone.

5. Select [SAVE].

Manage Bank Accounts ?

Deposit Order

Sequence

R	Checking ****1010	
---	-------------------	--

Account Information

Bank Account Type *
Checking

Status *
Active

Distribution Method *
Remaining

Distribution Amount
\$

Account Number *
****1010

Re-Enter Account Number *
****1010

Routing Number *
****0417

Voided Check
UPLOAD

CANCEL **5** SAVE

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.

My Info

Direct Deposit

Tax Withholding Info

Direct Deposit Accounts

Sequence	Bank Account Type	Account Number	Distribution
Remaining	Checking	****1010	Remaining

Account Details **2** X

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 X

Checking ****1010 **EDIT**

Status
Active

Sequence
Remaining

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.

Tax Withholding Info VIEW TAX WITHHOLDING INFO

Federal Withholding Info	State Withholding Info
Full Name User A Name	Ohio-W-4-1694530074639.pdf
Filing Status Single or Married filing separately	
Extra Federal Withholding -	

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

Edit Federal Withholding Info CANCEL SAVE

See the Federal W-4 Form filling instruction [here](#).

STEP 1: Personal Information

(a) **First Name *** **Middle Initial** **Last Name ***

Address Line 1 *

Address Line 2

City or Town * **State *** **Zip Code ***

(b) **SSN *** Does your name match the name on your social security card?

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

Edit Federal Withholding Info

CANCEL

4

SAVE

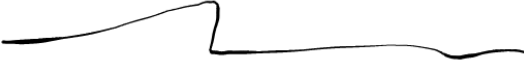
STEP 5: Sign Here

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

- 1. 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

Federal Withholding Info

EDIT

State Withholding Info

1

EDIT

Full Name

Filing Status

Extra Federal Withholding

User A Name

Single or Married filing separately

-

VIEW TAX WITHHOLDING INFO

Ohio-W-4-1694530074639.pdf

2. Select the delete icon next to your uploaded state W-4 PDF. This removes the file.

Edit State Withholding Info

CANCELSAVE

Ohio W-4 Form.pdf

Ohio-W-4-1694530074639.pdf

2

☐ 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].

Edit State Withholding Info

CANCELSAVE

Ohio W-4 Form.pdf

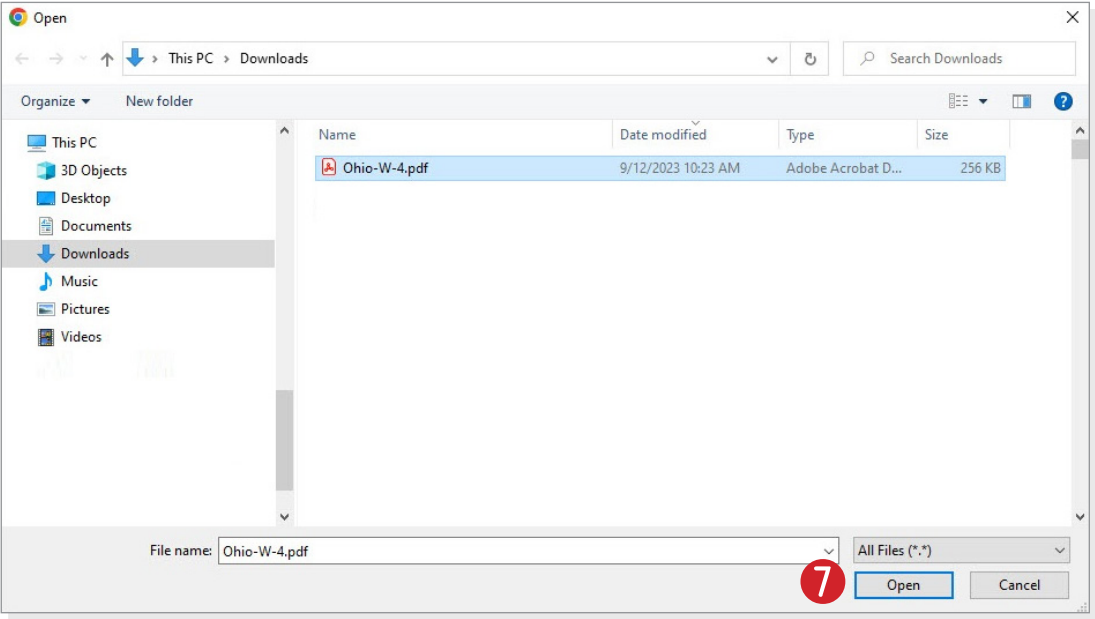
3

UPLOAD

6

☐ 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.)

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].

Edit State Withholding Info

CANCEL

9

SAVE

Ohio W-4 Form.pdf

Ohio-W-4-1707253010573.pdf

8

☐ 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.

Tax Withholding Info

Federal Withholding Info EDIT

State Withholding Info EDIT

Full Name User A Name [Ohio-W-4-1694530074639.pdf](#)

Filing Status Single or Married filing separately

Extra Federal Withholding -

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.

View Tax Withholding Information

W-4 Documents

Rendered **Uploaded**

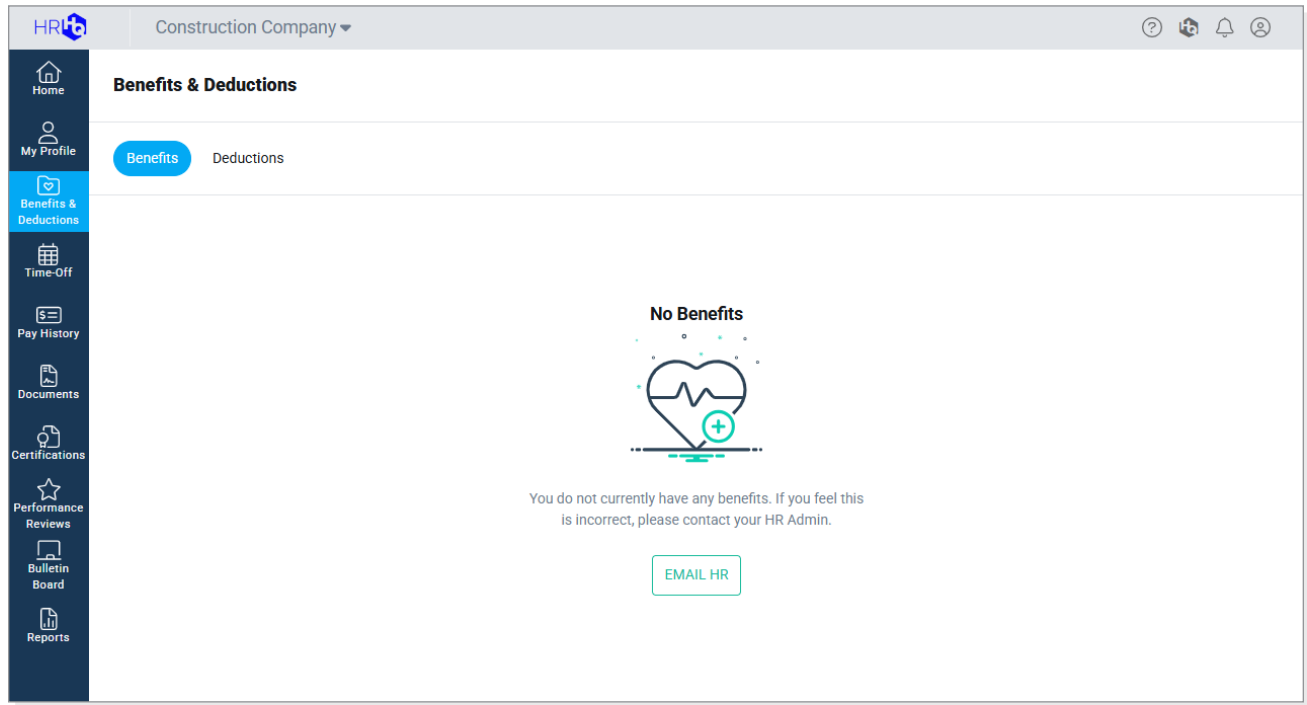
Select	Name	Upload Date
<input checked="" type="radio"/>	Ohio-W-4-1694530074639.pdf	09/12/2023
<input type="radio"/>	Ohio-W-4-1694529447362.pdf	09/12/2023
<input type="radio"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="radio"/>	Ohio-W-4-1694207330547.pdf	09/12/2023
<input type="radio"/>	Ohio-W-4-1694207330547.pdf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

CANCEL VIEW

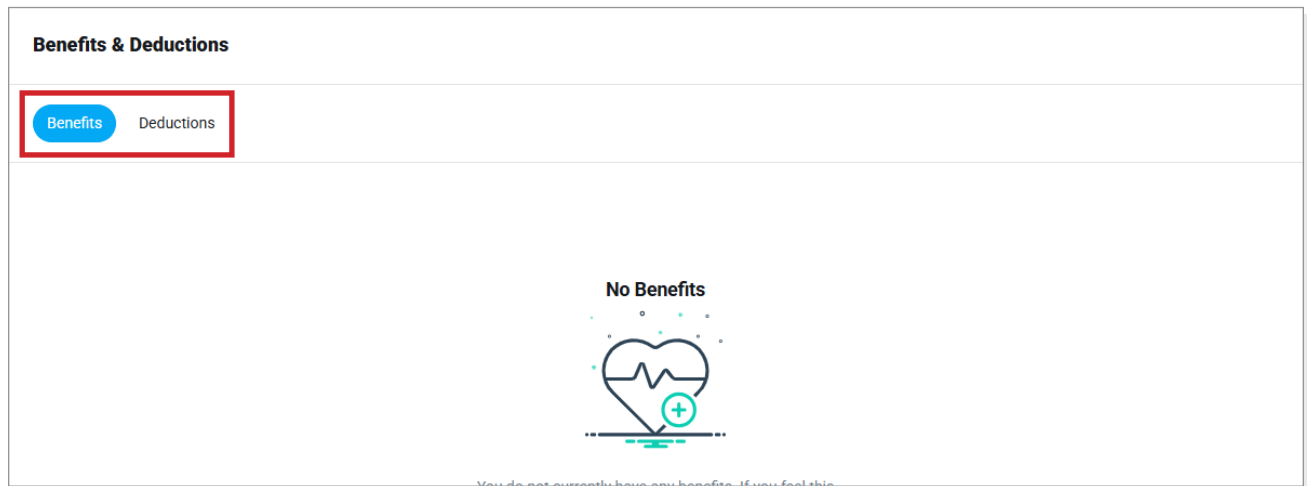
hrHQ BENEFITS & DEDUCTIONS

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.

Benefits/Deductions

Benefits Deductions

401K - 401K DEDUCTION

Plan Name	401K Deduction
Deduction Amount	40%

EDUCA - EDUCATION/TRAINING

Plan Name	Benefits
Deduction Amount	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.

Benefits/Deductions

Benefits Deductions

401K - 401K DEDUCTION

Plan Name	401K Deduction
Deduction Amount	40%

EDUCA - EDUCATION/TRAINING

Plan Name	
Deduction Amount	

"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.

Benefits/Deductions

Benefits **Deductions**

ADV1 - ADDITIONAL ADVANCE

Plan Name	ADV1 ADDITIONAL ADVANCE
Deduction Amount	\$25.00

ADVAN - EMPLOYEE ADVANCE

Plan Name	ADVAN EMPLOYEE ADVANCE
Deduction Amount	\$70.00

hrHQ TIME-OFF

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

hrHQ

Construction Company

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👤

Home

My Time Off

Calendar View

My Profile

Benefits & Deductions

Time Off

Pay History

Documents

Certifications

Performance Reviews

My Time Off

SICK

REQUEST TIME OFF

Hours Available

0.00

SICK

0.00

Hours Taken

0.00

SICK

0.00

Hours Projected

0.00

SICK

0.00

Hours Approved

0.00

SICK

0.00

Time Off Requests

⌵

⚙️

🔍

Date(s)	Plan Type	Total Hours	Status	Action
---------	-----------	-------------	--------	--------

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*.

My Time Off

Calendar View

My Time Off

2024

⚙️

🔍

REQUEST TIME OFF

Hours Available

0.00

Hours Taken

0.00

Hours Accrued

0.00

Hours Projected

0.00

Hours Approved

0.00

Dates	Plan Type	Total Hours	Status	Action
-------	-----------	-------------	--------	--------

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.

My Time Off

Calendar View

My Time Off

2024

REQUEST TIME OFF

Hours Available

0.00

Hours Taken

0.00

Hours Accrued

0.00

Hours Projected

0.00

Hours Approved

0.00

Dates

Plan Type

Total Hours

Status

Action

Calendar View

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

My Time Off

Calendar View

Calendar View

REQUEST TIME OFF

Hours Available

0.00

Hours Taken

0.00

Hours Accrued

0.00

Hours Projected

0.00

Hours Approved

0.00

TODAY

<

>

March, 2024

WEEK

MONTH

☒ Approved Time Off

☒ Pending Time Off

☒ Events

☒ Holiday

Sun

Mon

Tue

Wed

Thu

Fri

Sat

25

26

27

28

29

1

2

3

4

5

6

7

8

9

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HR**h**

24

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.

My Time Off

Calendar View

Calendar View

REQUEST TIME OFF

Hours Available0.00

Hours Taken0.00

Hours Accrued0.00

Hours Projected0.00

Hours Approved0.00

TODAY

<

>

March, 2024

WEEK

MONTH

FILTERS

Approved Time Off

Pending Time Off

Events

Holiday

Sun

Mon

Tue

Wed

Thu

Fri

Sat

25

26

27

28

29

1

2

3

4

5

6

7

8

9

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.

My Time Off

Calendar View

Calendar View

REQUEST TIME OFF

Hours Available0.00

Hours Taken0.00

Hours Accrued0.00

Hours Projected0.00

Hours Approved0.00

TODAY

<

>

March, 2024

WEEK

MONTH

FILTERS

Approved Time Off

Pending Time Off

Events

Holiday

Sun

Mon

Tue

Wed

Thu

Fri

Sat

25

26

27

28

29

1

2

3

4

5

6

7

8

9

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.

My Time Off

Calendar View

Calendar View

REQUEST TIME OFF

Hours Available0.00

Hours Taken0.00

Hours Accrued0.00

Hours Projected0.00

Hours Approved0.00

TODAY

<

>

March, 2024

WEEK

MONTH

FILTERS

☒ Approved Time Off

☒ Pending Time Off

☒ Events

☒ Holiday

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

HR**h**

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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.

My Time Off

Calendar View

My Time Off

2024

REQUEST TIME OFF

Hours Available

0.00

Hours Taken

0.00

Hours Accrued

0.00

Hours Projected

0.00

Hours Approved

0.00

Dates	Plan Type	Total Hours	Status	Action
-------	-----------	-------------	--------	--------

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.

My Time Off

Calendar View

My Time Off

2024

REQUEST TIME OFF

Hours Available

0.00

Hours Taken

0.00

Hours Accrued

0.00

Dates	Plan Type
-------	-----------

Request Time Off

Plan Type *

PTO Plan

Start Date *

07/08/2024

End Date *

07/12/2024

Day	Date	Hours
Monday	7/8/2024	8
Tuesday	7/9/2024	8
Wednesday	7/10/2024	8
Thursday	7/11/2024	8
Friday	7/12/2024	8

Total Requested:

40 Hours

Comments

5. 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' modal with the following details:

- Plan Type:** PTO Plan
- Start Date:** 07/08/2024
- End Date:** 07/12/2024
- Table of Requested Days:**

Day	Date	Hours	Action
<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' modal with the following details:

- Plan Type:** PTO Plan
- Start Date:** 07/08/2024
- End Date:** 07/12/2024
- Table of Requested Days:**

Day	Date	Hours	Action
<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

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

My Time Off 2024

Hours Available: 0.00 Hours Taken: 0.00

Request Time Off

Plan Type: PTO Plan

Start Date: 07/08/2024 End Date: 07/12/2024

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 7 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.

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

Submit Time Off Request

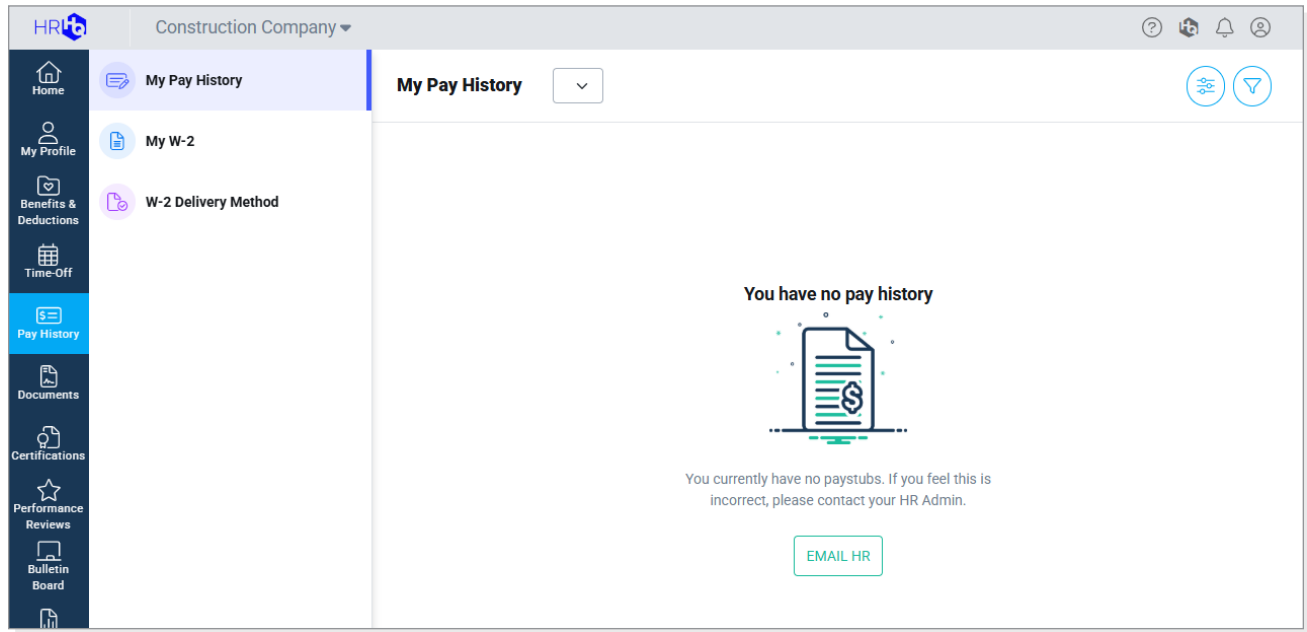
Do you want to submit this request?

CANCEL 8 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.

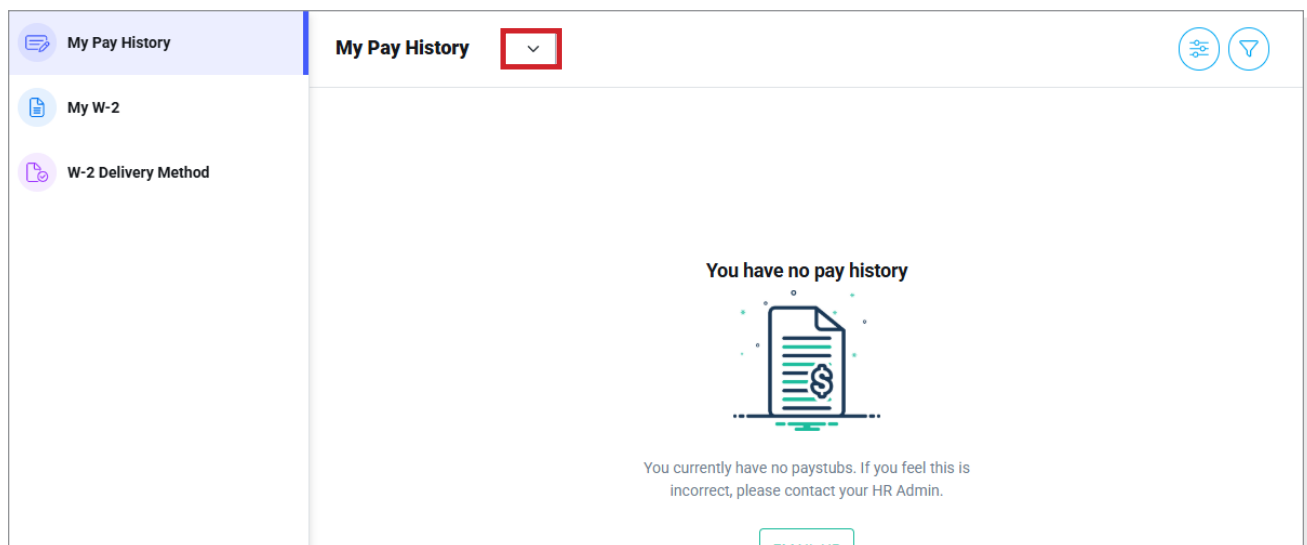


MY PAY HISTORY

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' screen. On the left is a sidebar with three options: 'My Pay History', 'My W-2' (which is highlighted), and 'W-2 Delivery Method'. The main content area has a header with 'My W-2' and a dropdown menu showing '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 two columns: 'Issue Date' and 'View Form'. The table is currently empty, with the text 'There is no data for this year' displayed below the column headers.

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, showing the 'My W-2' screen with the year 2023 selected. The key difference is that the 'FILING INSTRUCTION' button in the top right corner is highlighted with a red rectangular box, indicating where the user should click to view the filing instructions.

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.

My Pay History

My W-2

W-2 Delivery Method

W-2 Delivery Method

CHANGE CONSENT

Your Selection:

I consent to receive my W-2 electronically

I understand that I will be receiving my Form W-2 electronically and will not receive a paper copy. I have read the Electronic Delivery of Form W-2 communication provided.
[Form W-2 Electronic Delivery Consent Notice](#)

If you have any questions, please contact your HR Administrator,

Consent History

I consent to receive my W-2 electronically

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

Changing W-2 Consent

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

My Pay History

My W-2

W-2 Delivery Method

W-2 Delivery Method

CHANGE CONSENT

Your Selection:

I consent to receive my W-2 electronically

I understand that I will be receiving my Form W-2 electronically and will not receive a paper copy. I have read the Electronic Delivery of Form W-2 communication provided.
[Form W-2 Electronic Delivery Consent Notice](#)

If you have any questions, please contact your HR Administrator,

Consent History

I consent to receive my W-2 electronically

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

HR**h**

32

2. Update your consent selection.

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

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

My Pay History

My W-2

W-2 Delivery Method

Update W-2 Delivery Method

3

UPDATE

2

Your Selection:

I consent to receive my W-2 form electronically.

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

Consent History

✓

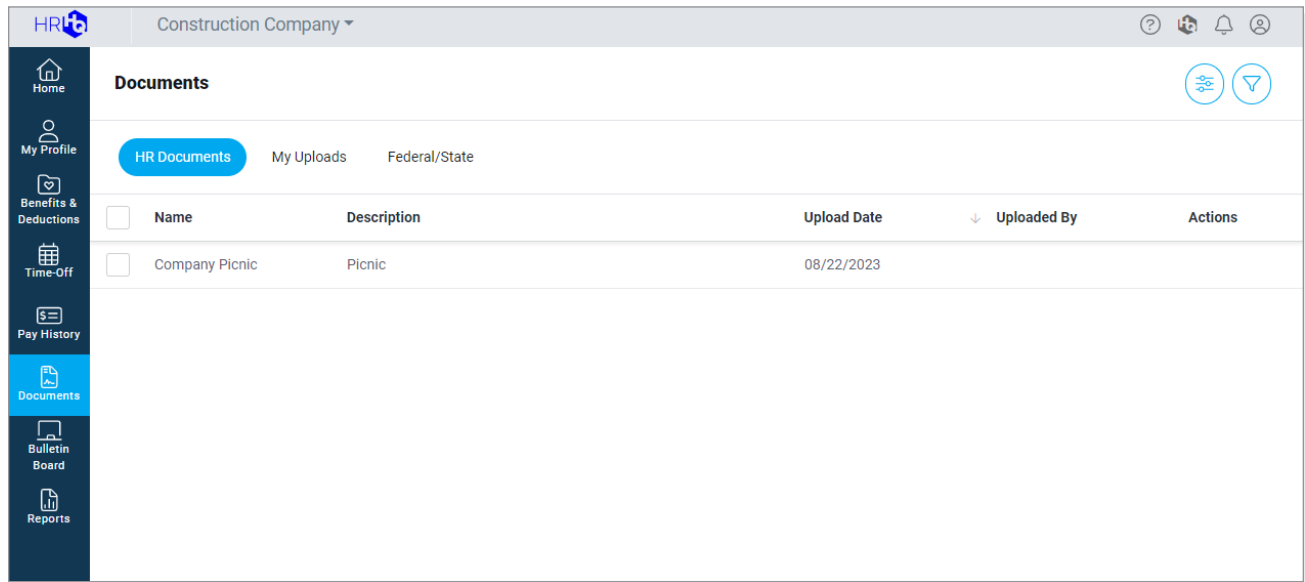
You changed your consent to: "Consent to receive my W-2 form electronically."

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.

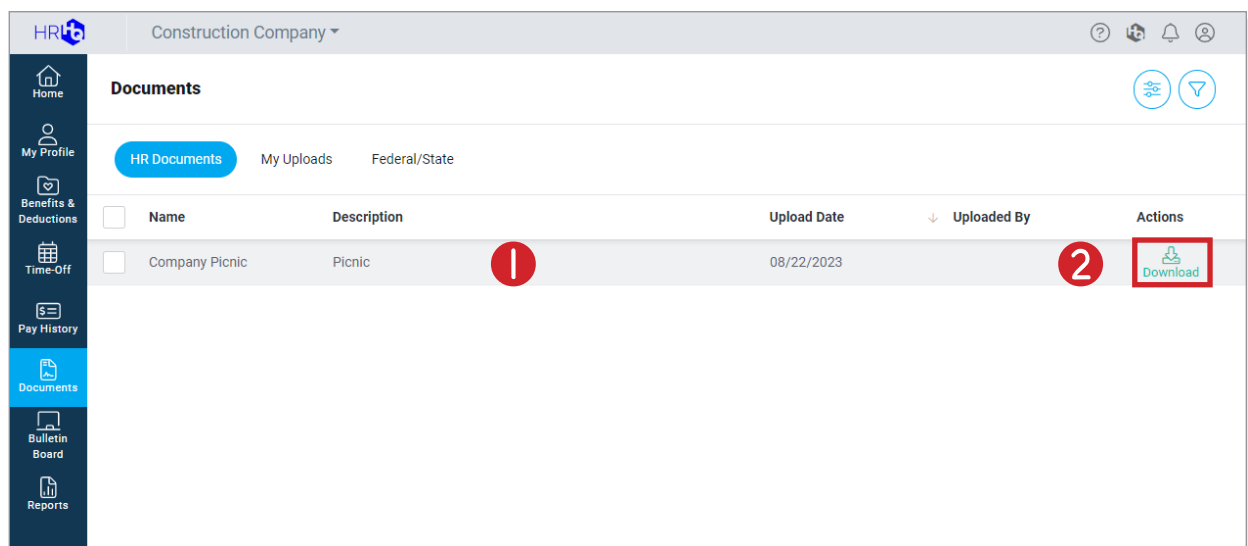


DOWNLOADING DOCUMENTS

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

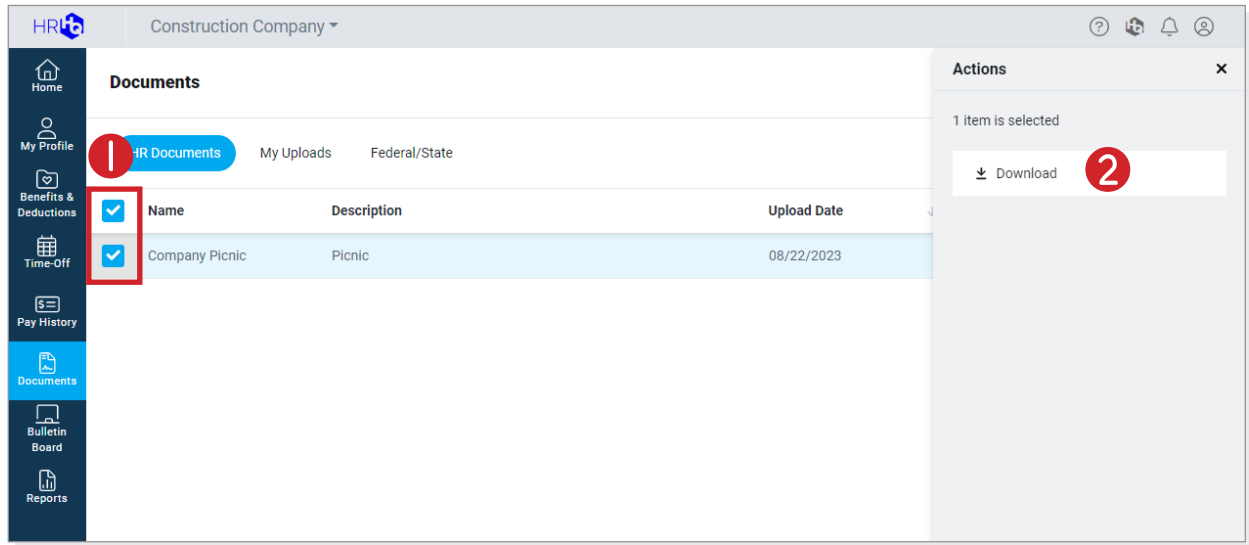
Downloading a Single Document

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

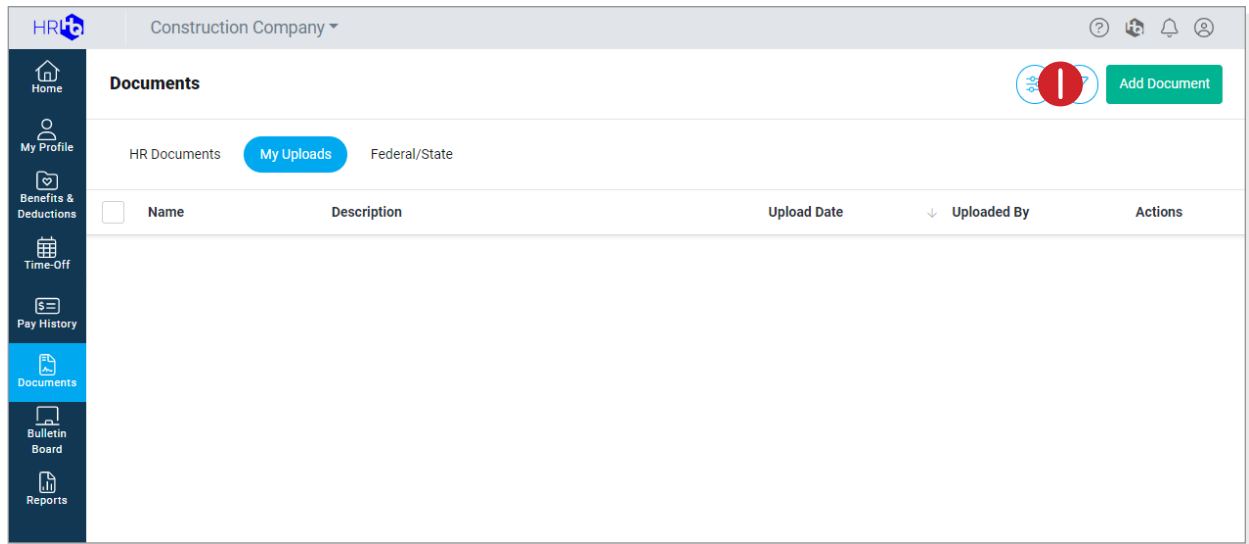
The “HR Documents” tab displays documents uploaded by your HR Department.

“My Uploads” Tab

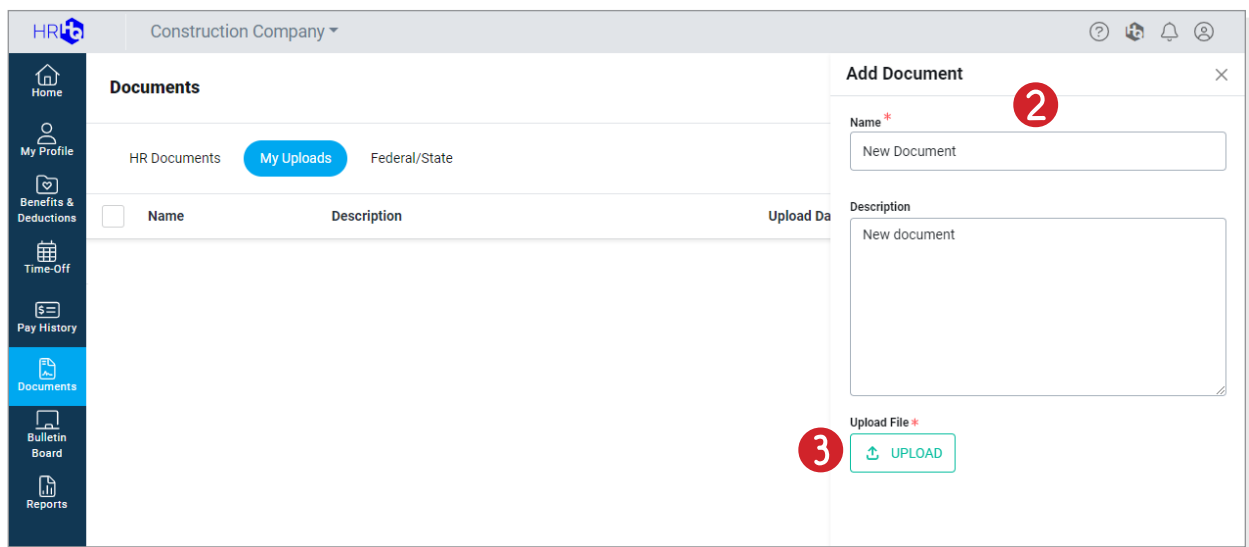
The “My Uploads” tab is where you can upload additional documents to your hrHQ account.

Uploading Records

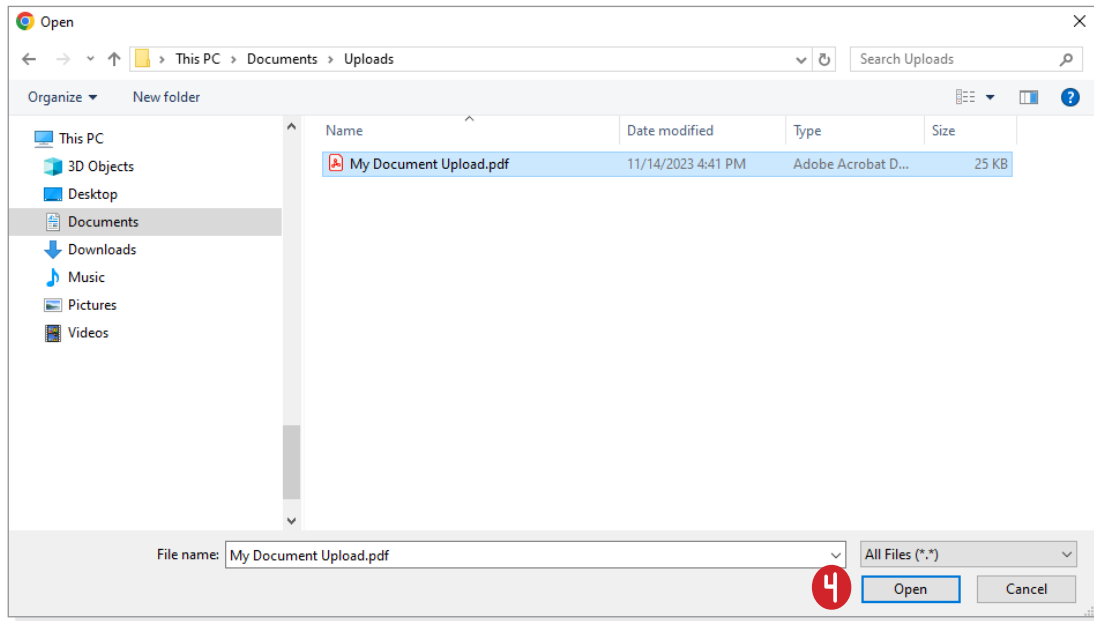
1. Select [ADD DOCUMENT] in the upper-right corner of the screen. The Add Document pane opens on the right side of the screen,



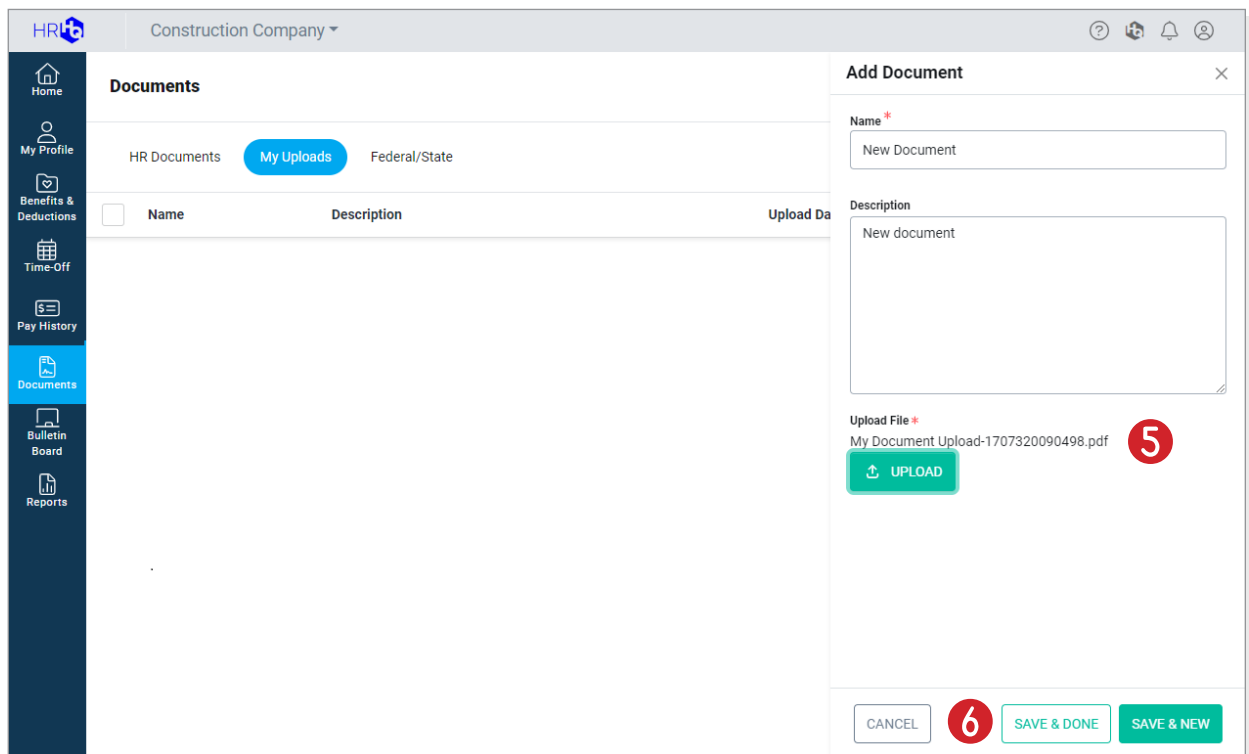
2. Complete all required fields.
3. Select [UPLOAD].



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



5. Confirm your document is attached.
6. Select [SAVE & DONE].

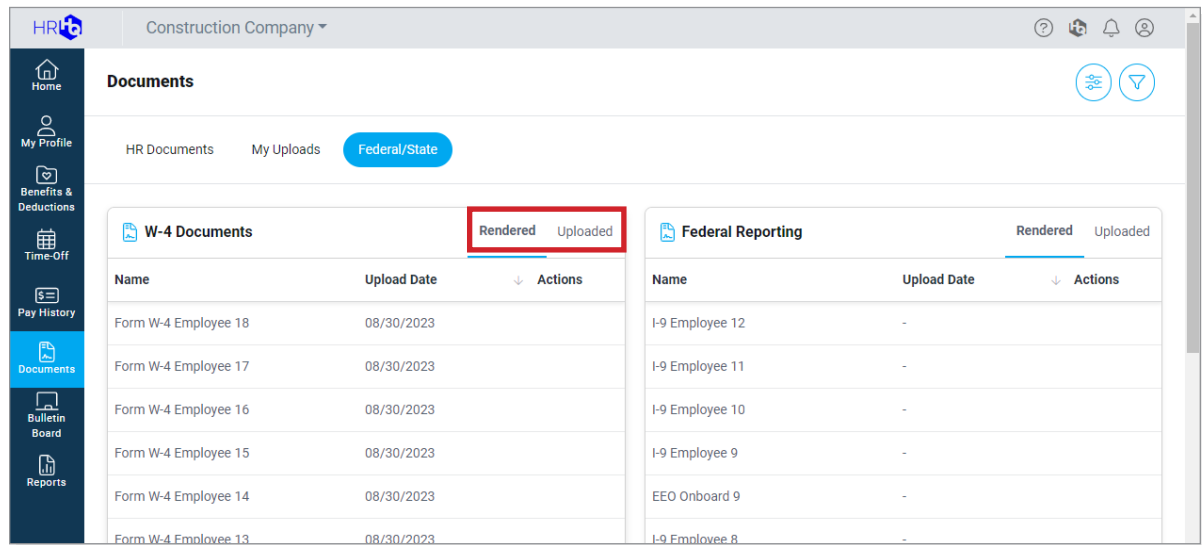


“Federal/State” Tab

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

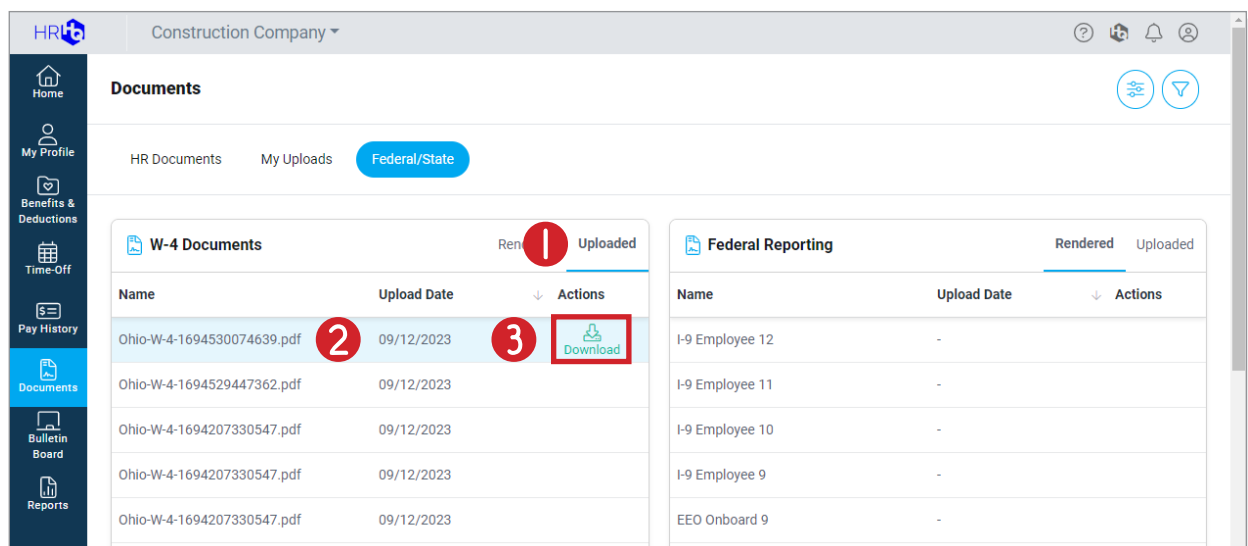
Each document type is organized in its own box. Each box contains two tabs, located in the upper-right corner of the section.

- 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.

My Reviews					
<div>Active History</div>					
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

“Active” Tab

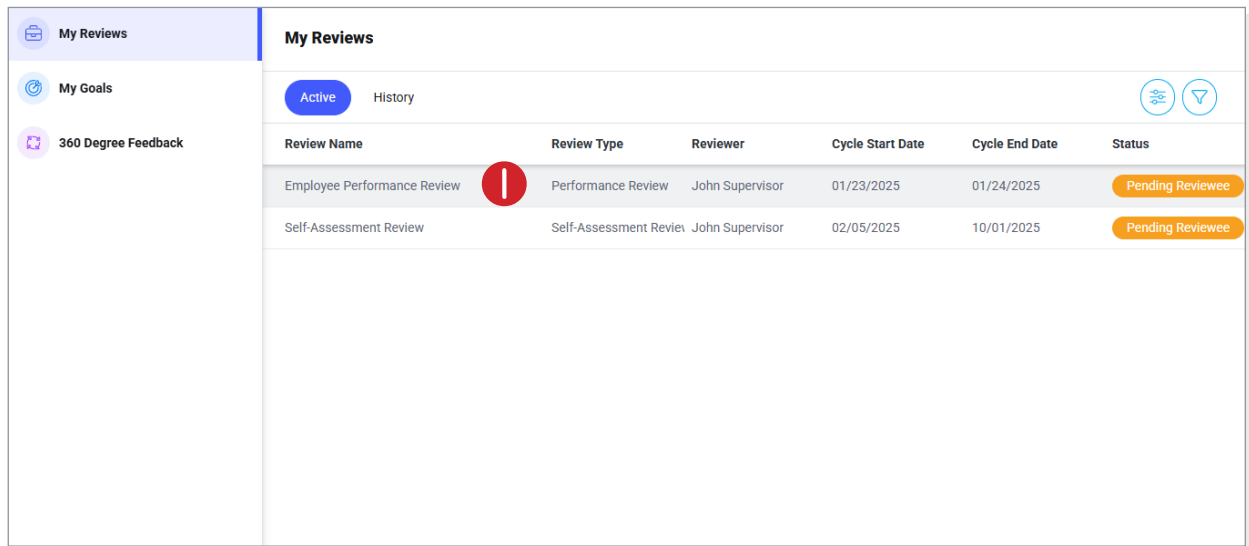
The “Active” tab displays your current reviews.

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.

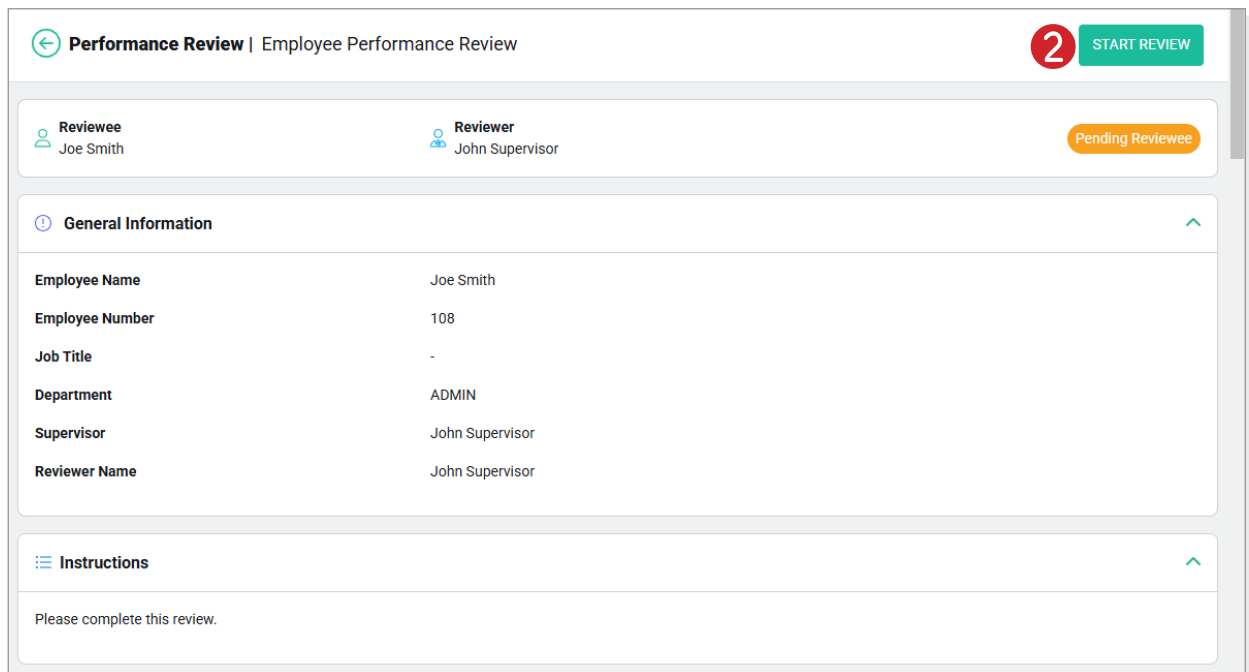
1. Select the performance or project review you want to complete.



The screenshot shows the 'My Reviews' page. 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 columns: Review Name, Review Type, Reviewer, Cycle Start Date, Cycle End Date, and Status. A red circle with the number '1' highlights the first row of the table.

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' page for 'Employee Performance Review'. At the top right, a red circle with the number '2' highlights a green 'START REVIEW' button. Below this, the 'Reviewee' is 'Joe Smith' and the 'Reviewer' is 'John Supervisor', with a 'Pending Reviewee' status. The page is divided into two main sections: 'General Information' and 'Instructions'. The 'General Information' section contains fields for Employee Name, Employee Number, Job Title, Department, Supervisor, and Reviewer Name. The 'Instructions' section contains the text 'Please complete this review.'

Performance Review | Employee Performance Review

2 **START 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

Please complete this review.

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

←

Performance Review | Employee Performance Review

CANCEL

FINISH LATER

SUBMIT REVIEW

ⓘ

General Information

⌵

Employee Name

Joe Smith

Employee Number

108

Job Title

-

Department

ADMIN

Supervisor

John Supervisor

Reviewer Name

John Supervisor

☰

Instructions

3

⌵

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).

←

Performance Review | Employee Performance Review

CANCEL

FINISH LATER

SUBMIT REVIEW

❓

Review Questions

4

⌵

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 | Employee Performance Review' form. At the top right are buttons for 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The form is divided into three main sections, each with a red circle containing a number:

- Documents 5:** Features a folder icon and the text 'No Documents attached.' Below this is an 'UPLOAD DOCUMENT' button.
- Goals 6:** Contains the text 'N/A.'
- General Comments 7:** Includes a 'Reviewer Comment' section with the text 'Great job!' and a 'Reviewee Comment' section with a large text input area.

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

This screenshot shows the 'Acknowledgement' section of the 'Performance Review | Employee Performance Review' form, marked with a red circle containing the number 8. At the top right, the buttons are 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW' (with a red circle containing the letter 'q' over the 'FINISH LATER' button). The section includes:

- The text 'Please acknowledge this review.'
- An orange warning box with a red 'x' icon and the text: 'Your signature is only saved after you submit the review.'
- 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.'
- A large text input area containing a handwritten signature.
- At the bottom left, two buttons showing the date '02/03/2025' and time '05:03 PM'.

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

Submit Performance Review

Are you sure you want to submit this Performance Review?

*The status of this review will be changed to "Reviewer Acknowledgement" upon submission.

CANCEL

10

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.

Performance Review | Employee Performance Review

Reviewee

Joe Smith

Reviewer

John Supervisor

Reviewer Acknowledgement

General Information

Employee Name

Joe Smith

Employee Number

108

Job Title

-

Department

ADMIN

Supervisor

John Supervisor

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

My Reviews

My Goals

360 Degree Feedback

My Reviews

Active

History

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	Reviewer Acknowledgement
Self-Assessment Review	Self-Assessment Review	John Supervisor	02/05/2025	10/01/2025	Pending Reviewee

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.

My Reviews

My Goals

360 Degree Feedback

My Reviews

Active History

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].

Self-Assessment | Self-Assessment Review

2 START 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

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

Self-Assessment | Self-Assessment Review

CANCELFINISH LATERSUBMIT REVIEW

Reviewer

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

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

CANCELFINISH LATERSUBMIT REVIEW

Review Questions

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

-

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

The screenshot shows the 'Self-Assessment | Self-Assessment Review' interface. At the top, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The 'Documents' section is highlighted with a red circle '5' and contains a table with columns 'Name', 'Description', and 'Actions'. The table has one row with 'Status Reports' and a description '-'. The 'Actions' column for this row has 'Download' and 'Delete' links. Below the table is an 'UPLOAD DOCUMENT' button. The 'General Comments' section is highlighted with a red circle '6' and contains two text input areas: 'Reviewee Comment' and 'Reviewer Comment'. The 'Reviewee Comment' area contains the text 'N/A'.

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

The screenshot shows the 'Self-Assessment | Self-Assessment Review' interface. At the top, there are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. The 'Acknowledgment' section is highlighted with a red circle '7' and contains the following text:

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.

Below this text is a message box: 'Your signature is only saved after you submit the review.'

The 'Reviewee Signature' section contains a checkbox labeled '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.' The checkbox is checked.

Below the checkbox is a large text input area for the signature. The signature is a handwritten line.

At the bottom, there are two input fields for the date and time: '02/05/2025' and '01:29 PM'.

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

Submit Self-Assessment Review

Are you sure you want to submit this Self-Assessment Review?

*The status of this review will be changed to "Pending Reviewer" upon submission.

CANCEL

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.

Self-Assessment | Self-Assessment Review

Reviewer

Joe Smith

Reviewer

John Supervisor

Pending Reviewer

General Information

Employee Name

Joe Smith

Employee Number

108

Job Title

-

Department

ADMIN

Supervisor

John Supervisor

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

My Reviews

My Goals

360 Degree Feedback

My Reviews

Active

History

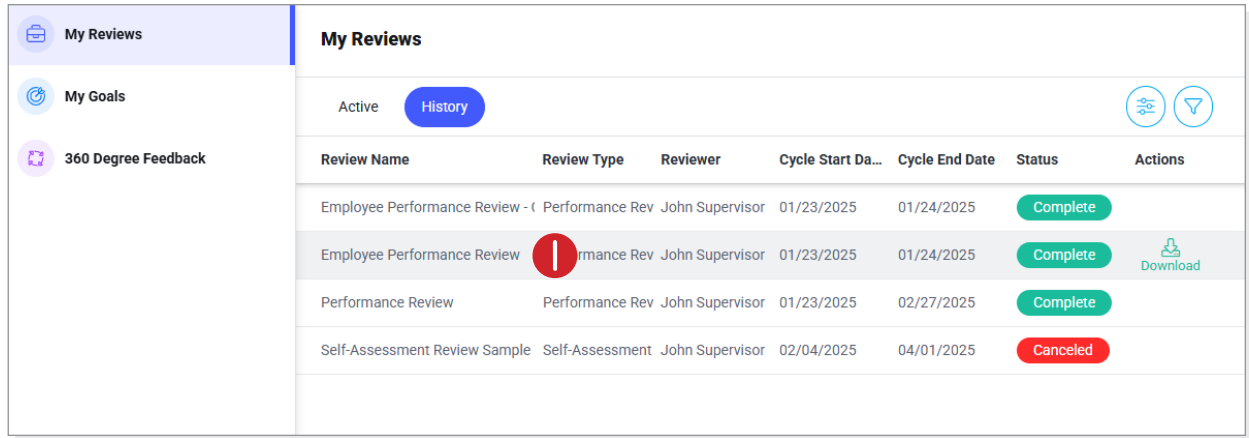
Review Name	Review Type	Reviewer	Cycle Start Date	Cycle End Date	Status
Self-Assessment Review	Self-Assessment Review	John Supervisor	02/05/2025	10/01/2025	Pending Reviewer

“History” Tab

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

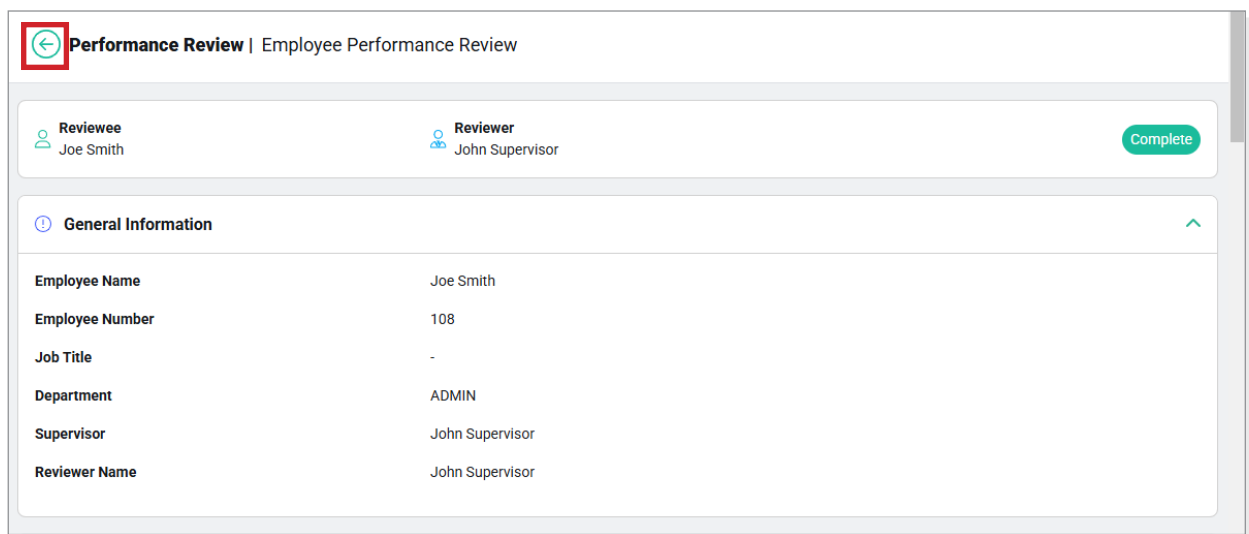
Viewing Review History

1. Select the review you want to view.



My Reviews						
Active		History				
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

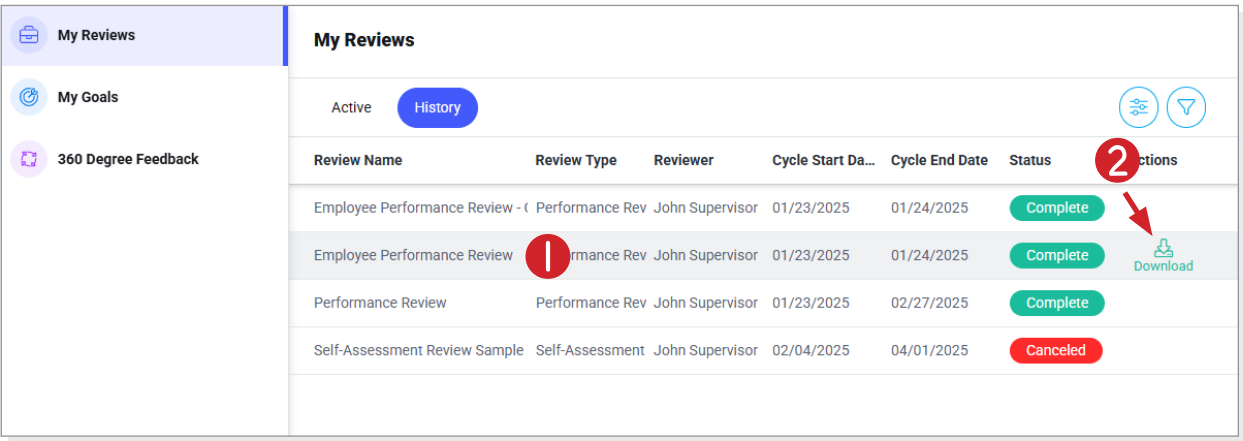
John Supervisor

Reviewer Name

John Supervisor

Downloading Review History

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



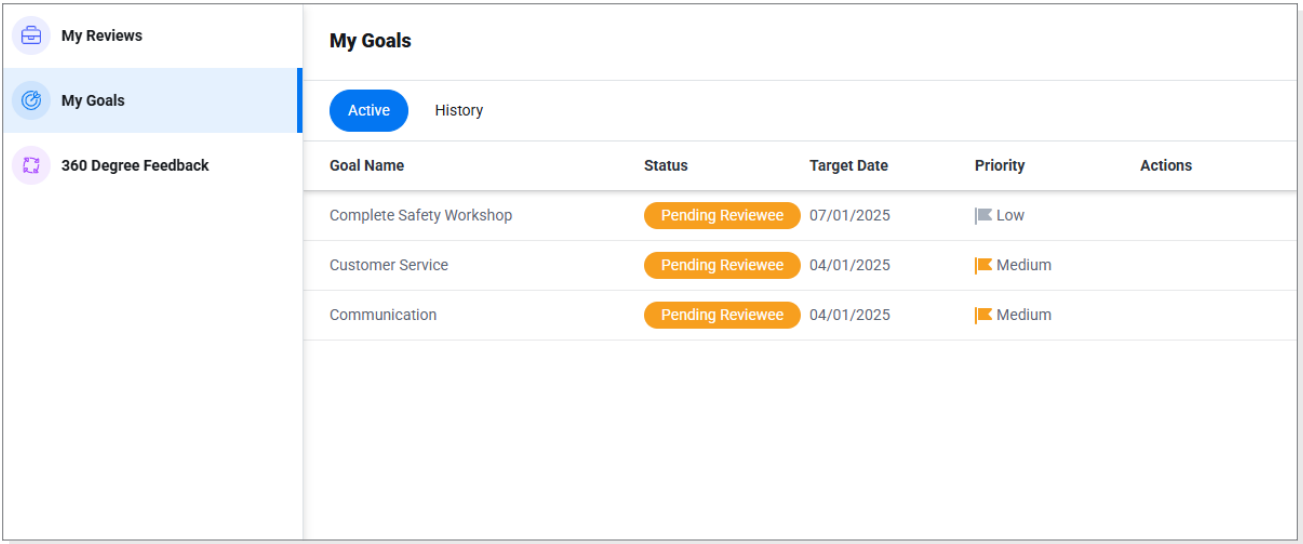
The screenshot shows the 'My Reviews' section of a web application. On the left is a sidebar with 'My Reviews', 'My Goals', and '360 Degree Feedback'. The main area has tabs for 'Active' and 'History'. A table lists reviews with columns: Review Name, Review Type, Reviewer, Cycle Start Date, Cycle End Date, Status, and Actions. A red circle with the number '2' is placed over the 'Actions' column header. A red arrow points to a 'Download' icon in the 'Actions' column of the second row, which is 'Employee Performance Review - Performance Review'.

Review Name	Review Type	Reviewer	Cycle Start Date	Cycle End Date	Status	Actions
Employee Performance Review - Performance Review	Performance Review	John Supervisor	01/23/2025	01/24/2025	Complete	Download
Employee Performance Review	Performance Review	John Supervisor	01/23/2025	01/24/2025	Complete	
Performance Review	Performance Review	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.



The screenshot shows the 'My Goals' section of a web application. On the left is a sidebar with 'My Reviews', 'My Goals', and '360 Degree Feedback'. The main area has tabs for 'Active' and 'History'. A table lists goals with columns: Goal Name, Status, Target Date, Priority, and Actions. The 'Active' tab is selected.

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.

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

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].

The screenshot shows the 'Goal Details' page for 'Customer Service'. The status is 'Pending Reviewee' and the priority is 'Medium'. The target date is '04/01/2025'. The 'Related Files' section shows a file 'Customer Service Reports.pdf' with an 'Upload' button (highlighted with a red circle 2). The 'Employee Note' section has a text area (highlighted with a red circle 3) and a 'SAVE' button (highlighted with a red circle 4). The 'Supervisor Note' section is empty. The 'SUBMIT' button is in the top right corner (highlighted with a red circle 5).

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].

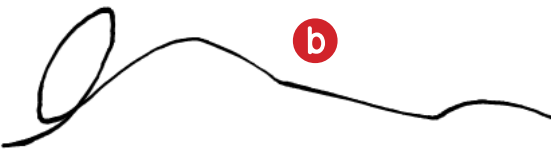
Submit Goal

Select Reviewer *

John Supervisor

Employee Signature *

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



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

LOAD SIGNATURE

CLEAR

☒ Unlock

CANCEL

SUBMIT

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

<div><div>My Reviews</div><div>My Goals</div><div>360 Degree Feedback</div></div>	My Goals				
	Active		History		
	Goal Name		Status	Target Date	Priority
	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.

My Goals

Active **History**

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.

Goal Details DOWNLOAD

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].

<div>My Reviews</div> <div>My Goals</div> <div>360 Degree Feedback</div>	My Goals				
	Active		History		
	Goal Name	Status	Target Date	Priority	Actions
	Customer Service	<div>1</div> Complete	04/01/2025	Medium	<div>2</div> <div>Download</div>

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

← Goal Details

DOWNLOAD

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.

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.

<div><div> My Reviews</div><div> My Goals</div><div> 360 Degree Feedback</div></div>	<div>360 Degree Feedback</div> <div><div>Active</div><div>History</div><div></div></div>				
	Review Name	Reviewee	Cycle Start Date	Cycle End Date	Status
	360 Degree Feedback	John Supervisor	02/04/2025	03/01/2025	Pending Reviewer

“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.

<div><div> My Reviews</div><div> My Goals</div><div> 360 Degree Feedback</div></div>	<div>360 Degree Feedback</div> <div><div>Active</div><div>History</div><div></div></div>				
	Review Name	Reviewee	Cycle Start Date	Cycle End Date	Status
	360 Degree Feedback	 John Supervisor	02/04/2025	03/01/2025	Pending Reviewer

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

The screenshot shows the top of a '360 Degree Feedback' form. At the top left is a back arrow icon and the text '360 Degree Feedback | 360 Degree Feedback'. At the top right is a red circle with the number '2' and a green button labeled 'START REVIEW'. Below this is a form section with the following fields: 'Job Title' (value: -), 'Department' (value: -), 'Supervisor' (value: -), and 'Reviewer Name' (value: Joe Smith). Below this section is an 'Instructions' section with a list icon and an upward arrow. 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.' Below the instructions is a 'Review Questions' section with a question mark icon and an upward arrow.

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

The screenshot shows the '360 Degree Feedback' form with more details. At the top left is a back arrow icon and the text '360 Degree Feedback | 360 Degree Feedback'. At the top right are three buttons: 'CANCEL', 'FINISH LATER', and 'SUBMIT REVIEW'. Below this is a section with 'Reviewee' (John Supervisor) and 'Reviewer' (Joe Smith) information, with a 'Pending Reviewer' status badge. Below this is a 'General Information' section with a list icon and an upward arrow. The general information fields are: 'Reviewee Name' (John Supervisor), 'Job Title' (-), 'Department' (-), 'Supervisor' (-), and 'Reviewer Name' (Joe Smith). Below this is an 'Instructions' section with a list icon, a red circle with the number '3', and an upward arrow. 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.'

4. 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

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. 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].

Submit 360 Degree Feedback

Are you sure you want to submit this 360 Degree Feedback of **John Supervisor**?

**This review will be changed to "Complete" status upon submission.*

CANCEL

7

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.

<div>My Reviews</div> <div>My Goals</div> <div>360 Degree Feedback</div>	360 Degree Feedback						
	Active		History				
	Review Name	Reviewee	Cycle Start Date	Cycle End Date	Status	Actions	
	360 Degree Feedback	John Supervisor	02/04/2025	03/01/2025	Complete	Download	

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.

360 Degree Feedback | 360 Degree Feedback

Reviewee
John Supervisor

Reviewer
Joe Smith

Complete

General Information

Reviewee Name

John Supervisor

Job Title

-

Department

-

Supervisor

-

Reviewer Name

Joe Smith

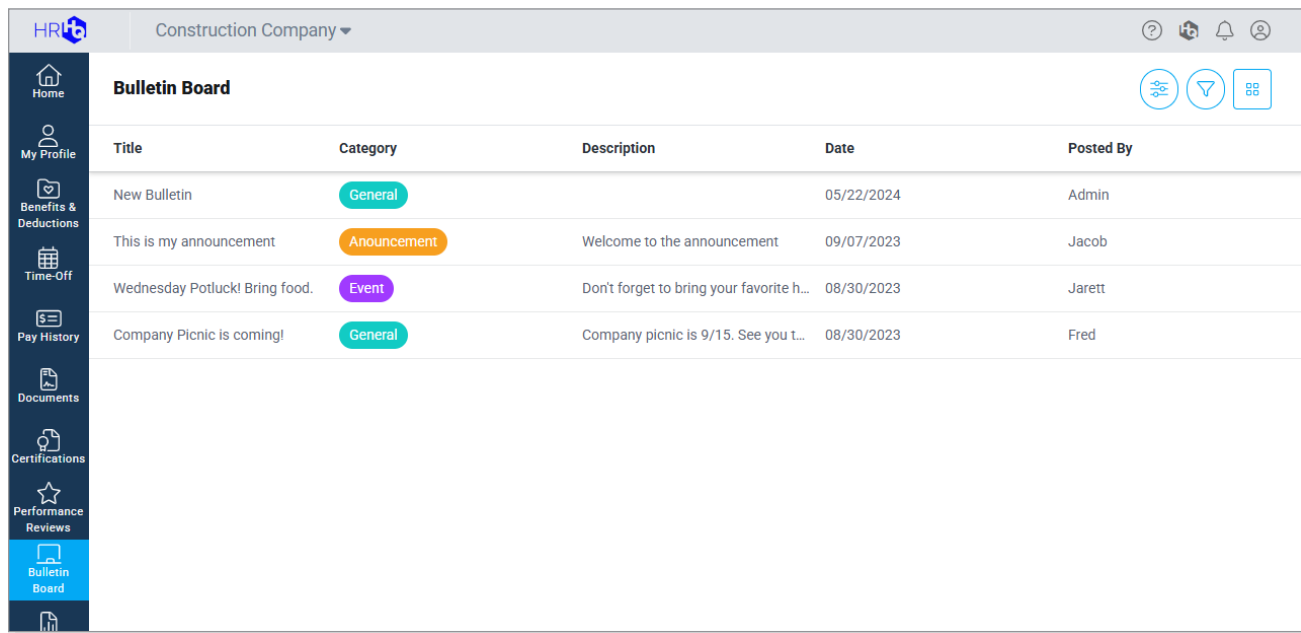
Downloading 360 Degree Feedback History

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

<div>My Reviews</div> <div>My Goals</div> <div>360 Degree Feedback</div>	360 Degree Feedback						
	Active		History				
	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

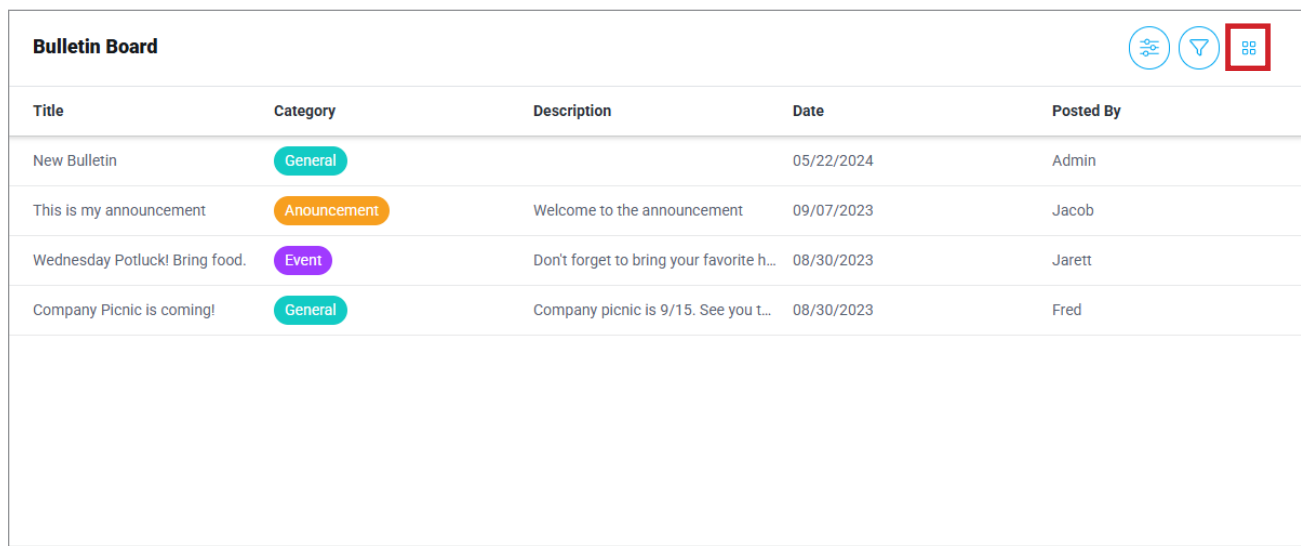
The Bulletin Board screen is where your company's HR Department will post company news, HR events, and any other useful information.



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




Admin05/22/2024
New Bulletin
General

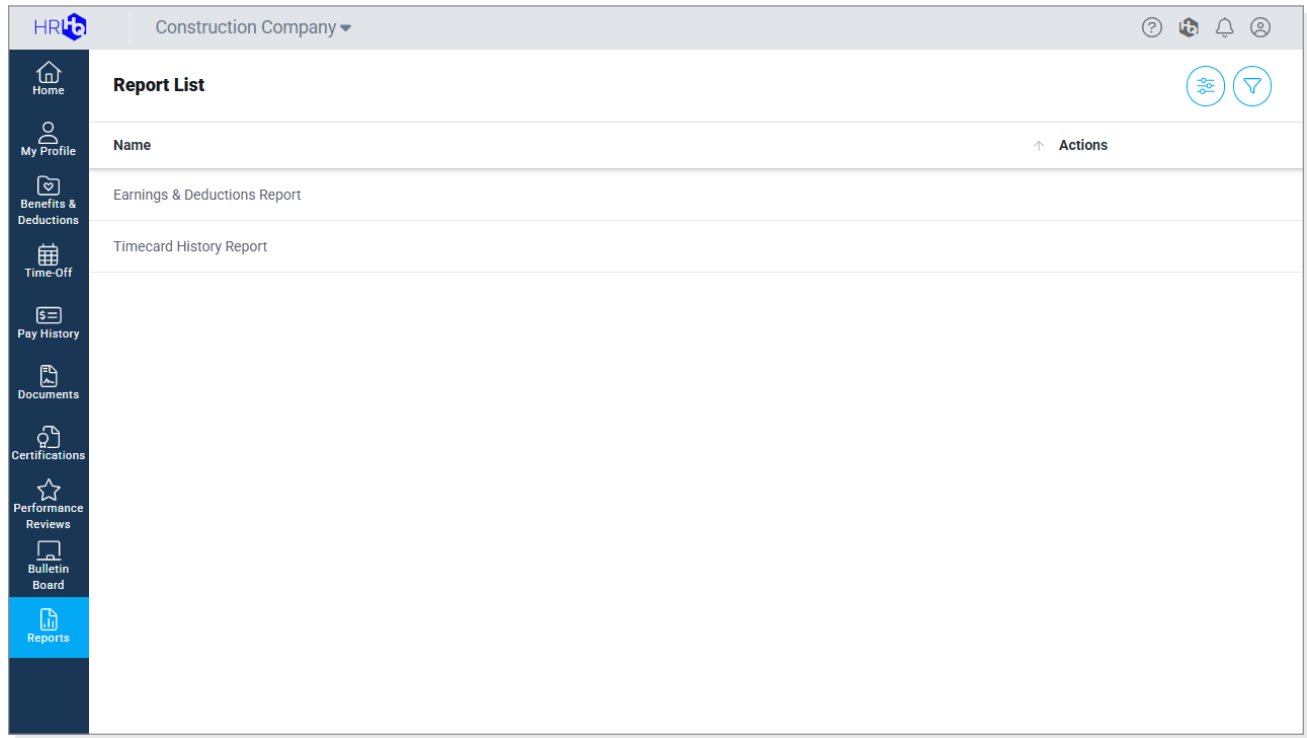

Jacob09/07/2023
This is my announcement
Welcome to the announcement
Announcement


Jarett08/30/2023
Wednesday Potluck! Bring food.
Don't forget to bring your favorite homemade dishes into the office this Wednesday!
Event


Fred08/30/2023
Company Picnic is coming!
Company picnic is 9/15. See you there!
General

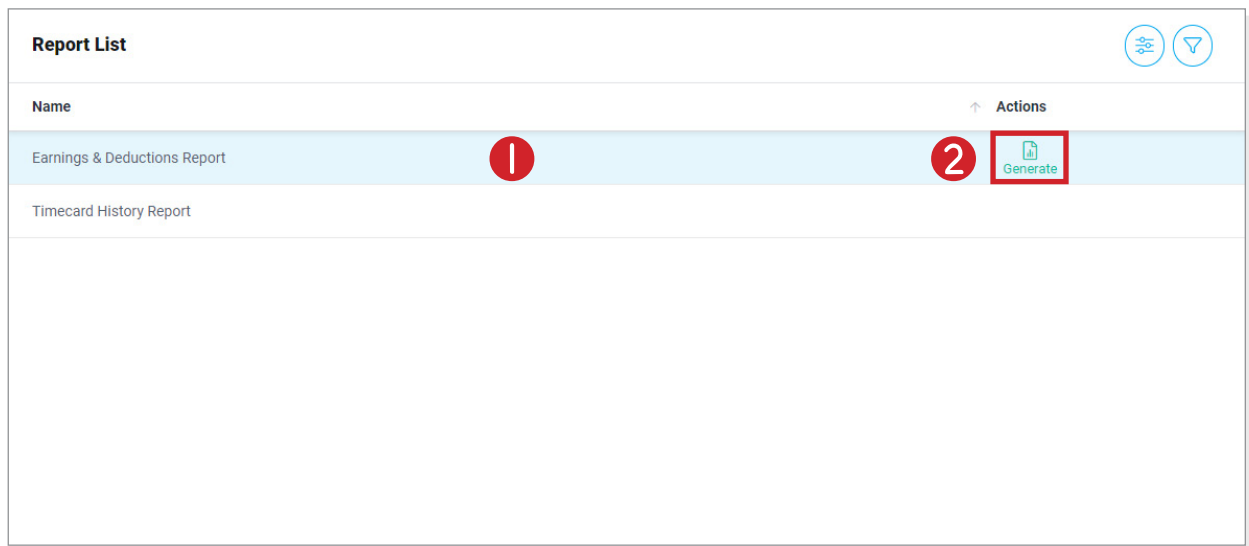
hrHQ REPORTS

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

Report Name *

Earnings & Deductions Report

From Date *

01/01/2024

To Date *

01/31/2024

CANCEL

RUN REPORT

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

← Earnings & Deductions Report

