



Optinacious 



A HIGH LEVEL
OVERVIEW OF
OPTINACIOUS'
HRIS SOLUTION

OPTINACIOUS HR

HRIS and Benefits Enrollment

The screenshots illustrate the user interface for HRIS and Benefits Enrollment. The first screenshot shows a user profile for Mandy Admin, including contact information and a 'Create Employee Profile' button. The second screenshot shows a 'My Benefit' page with health resources and a 'NW Benefits' logo. The third screenshot shows a 'Goals' page for the year 2017, displaying a table of personal and team goals with status indicators and due dates.

Category	Goals	Overall Status
Sales	2 Goals	Green
Customer Service	1 Goals	Red

Title	Description	Status	Due Date	Rating Weight
Mandy's personal goal 1	test	Green	10/12/2017	20 %
Mandy Goal 2	test	Green	11/30/2017	60 %
Development Goal	test	Red	3/24/2018	20 %

Optinacious_HR has been built from the ground up with the small business user in mind.

Powerful. Easy to Use.




A POWERFUL HR TOOL



FEATURES:

- ✓ Optinacious HR is an easy-to-use tool to help manage all aspects of employees within their company: Hiring, terminations, job/salary changes, etc.
- ✓ Employee and Manager self service for personal updates
- ✓ Simple to use, yet powerful, tracking tool for all staff change requests
- ✓ One place to track all job/salary changes and history of changes for all employees
- ✓ Useful tools to help colleagues connect with one another
- ✓ Powerful goal management to help hold employees accountable for what they have committed to achieving for the company
- ✓ Company wide document repository so employees can always have access to latest company-wide documents
- ✓ Flexible reminder system to systematically remind employees of important upcoming events such as license renewals, birthdays, and due dates within the organization
- ✓ Alerts that can be set up for proactive notification when employees change their personal information, or that can go out to select individuals when employees are hired or terminated
- ✓ Single place for the employee to keep track of available benefits and which benefits they have enrolled in
- ✓ Comprehensive reporting on employees, managers, census, and EEOC data.


ROLE BASED VIEWS

Optinacious 

Welcome, Tina Miller | Sign Out

Profile My Team Goals Documents Events Benefits Find Reports Admin

Home >> Create Employee Profile

 **Tina Miller**
President
206-225-2250
Employee Number: 3

Remember: C potentially qu

required fields.

Personal Administration Job Family Document

First Name * : Tina

Middle Name * : Middle Name

Last Name * : Miller

Role * : Manager HR Admin

SSN No * : 521-87-8895

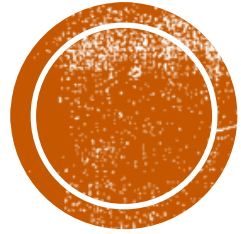
Preferred Name * : Tina

Gender * : Male Female

Marital Status * : Single

Tabs, fields, and workflow are all different based on roles: HR Admin, Manager, or Employee





EMPLOYEE PROFILE PAGES

The Profile pages store all of the critical information about each employee.

EMPLOYEE PROFILE: PERSONAL

Home » Create Employee Profile



Tina Miller

President

206-225-2250

Employee Number: 3

Personal Profile pages keeps track of all relevant fields for the employee.

Personal Administration Job Family Document

First Name * : Tina

Middle Name * : Middle Name

Last Name * : Miller

Role * : Manager HR Admin

SSN No * : 521-87-8895

Preferred Name * : Tina

Gender * : Male Female

Marital Status * : Single

Manager : Select Manager

Personal Email * : tina@tina.com

User Name/Work Email * : tina@optinacious.com

Date C

Phone1 (Work/Office) * : 206-225-2250

Phone2 (Work/Cell) : Phone2 (Work/Cell)

Phone3 (Home/Cell) : Phone3 (Home/Cell)

Phone4 (Home) : Phone4 (Home)

(Home) Address 1 * : 134 15th Ave

14 Out of 486 characters remaining.

State * : Washington

City * : Seattle

Zipcode * : 98117

Emergency Contact : Fred Miller

Emergency contact phone : 425-558-8874

Emergency contact address : 56 8th Ave
Bellevue, WA
98507

33 Out of 467 characters remaining.

Prof Image : Choose File No file chosen

Recommended Size of Image is 155 x 163 preview Delete Image

EMPLOYEE PROFILE: ADDITIONAL TABS

Tabs keep track of government mandated details, job/salary history, family members, and documents uploaded for the individual employee

Personal Administration Job Family Document

Key Dates

Hire Date : 4/14/2015

Benefit Eligibility :

Dental

Vision

Health

Long term

Veteran Status

Veteran : Decline

Branch : Branch

EEOC/Disability

Nationality : Americ

Disabled? : Yes

I9

Verified? : Yes

Work Authorization # : Docume

Personal Administration Job Family Document

Job Title * : CEO

Manager : Select Manager

Job Title Description : Job Description

Personal Administration Job Family Document

Immediate Family List + Add New

Name	Relation	Gender
Will Smith		
Tom Smith		
Mindy Smith		
Clare Smith		

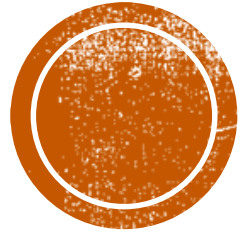
Terr

Em

Personal Administration Job Family Document

Title	Description
Performance Review	2018
Copy of CPR License	This document certifies that Fred Smith has passed his CPR certification and is valid through 3/15/2020





TEAM/MANAGER PAGES

Employees can quickly find their peers, and Managers have dedicated pages to help them manage their employees

MY TEAM

Profile

My Team

Goals

Documents

Benefits

Find

Colleagues

My Employees

	Name	Title	Phone
	- Tim Franklin	Engineer II	206-225-2267
	+ Profile (view personal info, current job, job history, etc.)		
	+ Request Change (Change Jobs;terminate;recomended etc.)		
	+ Goals (view personal info, current job, job history, etc.)		
	+ Alexa Peterson	Engineer I	206-225-2268
	+ Ella Marchino	Engineer II	206-225-2269

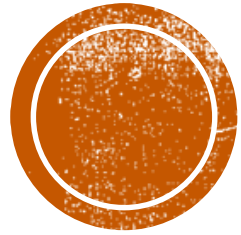
All employees have view of their colleagues.

Managers have additional views of:

- Employee profiles
- The ability to create workflow requests to HR for employee changes
- Links to employee goals

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GOAL TRACKING

Goal tracking can be turned on or off, but is a powerful tool for the business to help keep employees aligned with the business objectives

GOALS

Profile My Team **Goals** Documents Benefits Find

My Goals My Manager's Team's Goals My Employee's Goals Company Goals

For year : 2018 ▾

- Tim Franklin 2 total goals; Overall Status ●


Category	Title	Weight	Status	Due Date
- IT	2 Goals			
	Finalize API	50 %	●	8/24/2018
	Deliver SSO module	50 %	●	7/12/2018
Add New +				

+ Alexa Peterson 2 total goals; Overall Status ●

- Ella Marchino 2 total goals; Overall Status ●

Category	Title	Weight	Status	Due Date
+ IT	2 Goals			
	Work on Module 4	45 %	●	5/25/2018
	Module 5	55 %	●	6/15/2018

Overall Performance



Total Number Of Employees
Total Number Of Goals : 6
Average Goals per Employee

Sophisticated Goal Tracking:

- Personal Goals
- Employees' Goals
- Viewing of Manager Goals
- Company Goals
- Dashboards for quick status views
- Ability to set status a variety of ways
- Can link personal goals to Team and Company Goals





DOCUMENTS — COMPANY WIDE

These pages provide the company a single place to put company-wide documents so that employees have immediate access

COMPANY DOCUMENTS

Profile | My Team | Goals | Documents | Events | Benefits | Find | Reports | Admin

Home » Company Wide Documents

[Add New Document](#)

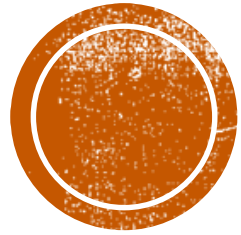
Below are company documents that are important for you to have awareness of and access to

Title	Description	Date Updated		
Employee Handbook v1	The employee handbook everyone needs to read.	04/27/2018	Edit	
Expense Policy v1	The expense policy for the company	05/07/2018	Ed	

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HR Admins can upload documents that the whole company can view easily





EVENTS

Create company wide or targeted reminders quickly and easily

EVENTS

- Profile
- My Team
- Goals
- Documents
- Events
- Benefits
- Find
- Reports
- Admin

Home » Full List of All

Search:

Title :

From Date :

Pending

Past

Add

Title

Goals are due The perso

Manage Event

Event Title * : Goals are due

Description * : The personal goals for each person are due on March 15th

Assignment * : All Employees All Managers Specific People

Alert Type * : Licence Renewal Reminder

Confirm License: Which info should be captured from employee?

License Name:

New Expiration Date:

License Number:

Comments:

Due Date * : Specific Date Varies by individual



Send reminder email * : 1 Day Prior

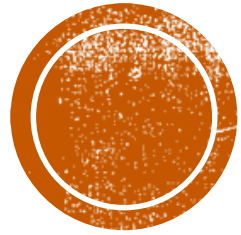
Is Recurring? : Yearly

Save

Cancel

Events are systematic reminders that can be defined in various ways, to go out to specific or groups. Once set the system will send out reminders when due





BENEFITS

Deep benefit functionality to support using the tools as a way to help manage the distribution of benefits to employees

BENEFITS

- Profile
- My Team
- Goals
- Documents
- Events
- Benefits
- Find
- Reports
- Admin

- My Benefit
- Enrollment
- Benefit Management
- All Companies
- Tools and Resources

Enrollment

Current factors that influence Rates

Marital Single [Change](#)

Status:

Dependents: 0 [Change](#)

Address: 134 15th Ave [Change](#)

Period : 2020 *

1. Select Benefit/Provider:

Dental

2. Enroll?

Yourself	Gender	DOB	SSN
<input checked="" type="checkbox"/> Tina Miller	Femal	5/12/1971	521-87-8895

Family

Name	Relation	Gender	DOB	Spouse?	Zip Code of Residence
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Page 1 of 0

No records to view

3. Click to confirm:

Yes, I want these benefits

Projected Monthly Cost

Enrolled?	Benefit	Provider	Your Portion	Company Pays	UnEnroll
No	Dental		0.00	0.00	✖
No	Vision		0.00	0.00	✖
No	Healthcare		0.00	0.00	
No	Long term disability		0.00		
Monthly Totals :			0.00		

Employees have tools to enroll in available benefits, which are set up by HR Admin or by a benefit broker who is given access



BENEFITS - MANAGEMENT

- Profile
- My Team
- Goals
- Documents
- Events
- Benefits
- Find
- Reports
- Admin

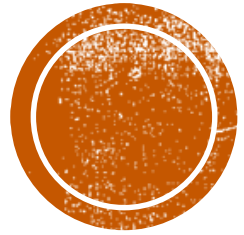
- My Benefit
- Enrollment
- Benefit Management
- All Companies
- Tools and Resources

Period :
 Benefit:
 Provider:

Emp Name	Emp #	Employee Type	Hire Date	Title	Eligible?	IsEnrolled	Eligible Override	Provider	Enrollment Window	Enrollment Form
Tina Miller	3	Full Time	4/14/2015	CEO	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A		<input type="radio"/> Yes <input checked="" type="radio"/> No	Print
Tim Franklin	4	Full Time	1/26/2016	Engineer II	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A		<input type="radio"/> Yes <input checked="" type="radio"/> No	Print
Sally Hawthorne	1	Full Time	4/14/2015	President	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Rose Garrett	5	Full Time	7/25/2017	VP of Sales	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Robert Porter	7	Full Time	8/23/2016	Account Executive	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Maria Garcia	9	Part Time	8/12/2017	Customer Service	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Lance Jackson	10	Full Time	5/26/2016	Account Executive	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Fred Smith	2	Full Time	6/12/2015	VP of Tech	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Ella Marchino	14	Contractor	6/14/2017	Engineer II	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Ava Chang	11	Part Time	1/1/2018	Account Executive	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A			
Alexa Peterson	12	Full Time	3/15/2016	Engineer I	<input type="radio"/> Yes <input checked="" type="radio"/> No	✗	N/A		<input type="radio"/> Yes <input checked="" type="radio"/> No	Print

HR can see who is eligible or not for various benefits. Additionally, HR can override eligibility and enrollment windows





SEARCH/FIND

Employee directory functionality







FIND


Profile My Team Goals Documents Events Benefits Find Reports Admin

Home » Find Employees

Find by: Start With Contains

Employee First Name
Employee Last Name
Manager First Name
Manager Last Name
Employee Role
Employee Type

First Name	Last Name	Manager	Email	Office Phone	Org View
	Tina			206-225-2250	Org
	Fred	Tina Miller		206-225-2266	Org
	Tim	Fred Smith		206-225-2267	Org
	Alexa	Peterson			
	Ella	Marchino			
	Rose	Garrett			



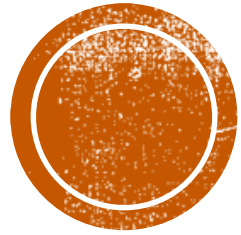
Rose Garrett
Manager, Employee

Manager: Tina Miller ()
Title: VP of Sales

Phone1 (Work/Office): 206-225-2270
Phone2 (Work/Cell):
Phone3 (Home/Cell):

- All employees have ability to search for other employees and see a mini profile
- HR Admins and Managers can link directly to actionable pages.





REPORTING

Get at the data that is needed to manage employees and the business

REPORTING

- Profile
- My Team
- Goals
- Documents
- Events
- Benefits
- Find
- Reports
- Admin

- Employee Census
- Enrollment
- Eligible But Not Enrolled
- Salary Report
- Manager Report
- Employee Detail Report
- Goal Report
- Payroll Report
- EEOC Report

Filters:

Enrollment Period : Benefit Type : Provider :

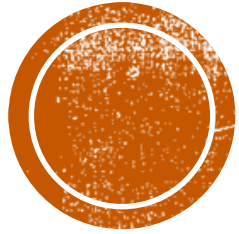
Include : Dependents Include Terminated Employees Terminated Employees Only

If Benefit Type is not selected, eligibility rules cannot be determined and all employees will be returned.

Name	SSN	ID Link	HireDate	Termi. Date	Type	Indi Type	Ben Type	Provider	City
Maria Garcia	325-56-5589	325-56-5589	08/12/2017		Part Time	E	N/A		Seatt
Tim Franklin	521-85-8874	521-85-8874	01/26/2016		Full Time	E	N/A		Seatt
Tina Miller	521-87-8895	521-87-8895	04/14/2015		Full Time	E	N/A		Seattle
Fred Smith	532-99-9987	532-99-9987	06/12/2015		Full Time	E	N/A	4/8/1985 Male 234 6th Ave	Seattle

- Reports access is configurable
- All reports are exportable to Excel quickly





ADMIN

Admins have ability to set up and control the system for the company, plus have extra permissions for viewing or managing sensitive data

ADMIN

Profile My Team Goals Documents Events Benefits Find Reports Admin

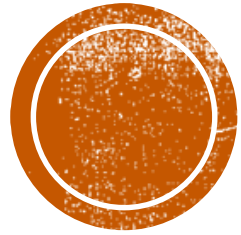
Employee Action Manage Company Settings Accounts Roles Change Requests Assign Menu to Company

- ❖ Add Employee
- ❖ Terminate Employee
- ❖ Rehire Employee
- ❖ Change
 - ❖ Job for employee / Promote
 - ❖ Assign Manager to Employees
 - ❖ Salary
 - ❖ Employee Type

Admin functions allow for:

- Managing employee roles
- Responding to change requests submitted by managers
- And configuring which screens employees/ managers see





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