**Purpose:** A quality experience and excellent results are dependent on our teams working together. This service guide helps management teams efficiently contact EG for support, have confidence in response times, and know in advance the time demands for delivering solutions in most cases.

**When and Who to Contact at EG**

HR On Duty (HROD) Ext. 7103 hrod@employersguardian.com

Risk Management Ext. 7104 risk@employersguardian.com

Payroll Ext. 7102 payroll@employersguardian.com

EGForce Support Ext. 1008 egforce@employersguardian.com

**Employer’s Guardian, LLC**

**PH: 916-635-2543**

**FAX: 916-635-3434**

**www.employersguardian.com**

*While this list is not an all-inclusive list of Employer’s Guardian services, it represents our most common service requests. Please remember, we are here to help your team with almost all issues or opportunities that involve employees.*

***Response Time Standard -*** *Our time commitment for initiating work on your* ***Non-Urgent*** *service request.*

***Delivery Time Standard -*** *Time required for EG to deliver solutions where best practice training has been followed and EGForce tools have been used.*

***Urgent Service Request*** *– Unpredictable challenges that require immediate action to prevent serious harm qualify as urgent. EG commits to a one-hour response time in these cases.*

**PAYROLL**

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| **Service Type** | **Response Time Standard** | **Delivery Standard** |
| **General Questions** | **4 Hours** |  |
| **Final Checks-** Do you need a final check for an employee? Questions on when it is due to the employee or what can be deducted? | **4 Hours** | **4 Hours** |
| **Employee Changes-**These are usually done through Employee Self Service or the client Payroll Partner. If mass updates are needed, we are here to assist. | **4 Hours** | **1 day** |
| **Accrual Questions**- How to accrue vacation/PTO per your policy? Employee accrual discrepancies? | **4 Hours** | **1 day** |
| **Payroll Tax Issues**-Do you need clarification on payroll taxes and filing? Did you receive a letter from the IRS or State Tax Board? New laws or rates need clarity? | **4 Hours** |  |

**HR-ON DUTY**

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| **Service Type** | **Response Time Standard** | **Delivery Standard** |
| **Recruiting-** Job posting development, posting set up and resume management. | **4 Hours** | **1 Day** |
| **New Employee Enrollment-** Enrollment packet assembly and distribution to the new employee and Hiring administrator of your organization via DocuSign. | **2 Hours** | **2 Hours** |
| **Employee Performance Issues-** We will be your voice of reason with the end goal in mind…a positive company culture and lower unemployment rates! Let EG Document the Performance Improvement Plan with your input. | **4 Hours** | **4 Hours** |
| **LOA & ADA-** EG handles the heavy lifting of LOA or ADA intake, case creation, coaching your team. Contact us to protect against the leading generator of discrimination lawsuits. | **4 Hours** | **1 Day** |
| **Employee Termination-** Let us help you document the separation of employment in a manner that will protect the company from costly claims. | **4 Hours** | **1 Bus Day Prior Term Date** |
| **Unemployment Claims**- EG will protest benefit eligibility that on average cost $4,200 but can exceed $12,000 per claim. EG will produce strategically crafted responses with supporting evidence that will be presented in a professionally organized manner.  | **4 Hours** | **EDD Due Date** |

**RISK MANAGEMENT**

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| **Service Type** | **Response Time Standard** | **Delivery Standard** |
| **OSHA Compliance-** Have a question about compliance; Your Safety Plan? Being inspected by OSHA, or an insurance carrier? We will consult, facilitate and/or represent you during the inspection. | **4 Hours** | **Variable** |
| **Employee Injuries/WC Claims-** We’ll guide you through the investigation process, set up the medical treatment authorization, set up the claim with your insurance carrier, and manage the claim in a cost-effective manner. | **1 Hour** | **1 Hour** |
| **Drug Testing Questions-** Testing locations, random selection notices, test result management, disciplinary action, Policy or DOT compliance questions? | **4 Hours** | **4 Hours** |
| **Worker’s Compensation Renewal-** Time to start shopping for a better policy? Let us help! We have all the information at our finger tips. The paperwork can be cumbersome! | **4 Hours** | **Variable** |
| **Worker’s Compensation Audits-** Let us handle them in our office so you don’t have to slow down production or worry about an auditor seeing your operations. | **4 Hours** | **5 Days** |

**CLOUD SERVICES/TECHNICAL SUPPORT**

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| **Service Type** | **Response Time Standard** | **Delivery Standard** |
| **EGForce-** Questions about the functionality of EGForce? How to process new hire enrollments, utilize the performance management tools, run reports, upload files, change user permissions, update certifications? We are ready to support. | **2 Hours** | **Variable** |
| **EGLearning Bridge**- Questions about Bridge functionality? Login or password reset issues? Course Management questions? Need help running a report on employee learning progress? We are ready to support. | **2 Hours** | **Variable** |

**CLIENT SERVICES AARON SMITH, VP OF CLIENT SERVICES X1003**

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| **Service Type** | **Response Time Standard** | **Delivery Standard** |
| Questions, recommendations, comments, or concerns about EG Service? | **2 Hours** | **Variable** |

**Partner Identification**

Our client designated partners are the key points of contact for Employer’s Guardian. Partner designations help control client security, what access they have to confidential and/or sensitive employee records in EGForce and identify levels of authority for decision-making.

**Legend**

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| --- | --- |
| Officer Partner | The client of Employer’s Guardian with unrestricted access to records in EGForce. |
| HR Partner | Client contact authorized to work with EG on confidential employment matters. |
| Payroll Partner | Client contact authorized to work with EG on Payroll Processing. |
| Risk Partner | Client contact authorized to work with EG on matters of safety and compliance. |
| Manager Partner | Manager Partners who need EG support to handle matters related to their direct reports. |
| Hiring Administrator | Client contact who will be facilitating the hiring process through EGForce. |
| Primary | When more than one person carries a designation, we need to know who the primary is. |

**Client Partners and Designations**

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| **Name** | **Designations** | **Primary Location** |
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**How Work Flows from Client to EG**

# Recruitment

1. HR Partner will contact Employer’s Guardian to assist with recruitment. Together they will determine where to place ads for the open position.
2. Resumes and applications will flow directly into Job Posting within EGForce.
3. HR Partner will provide feedback on the candidates submitted so Employer’s Guardian can re-adjust the selection process, if needed.
4. HR Partner will interview or assign interview responsibilities to other Manager Partners of prospective candidate and collect completed application.
5. Manager Partner forwards a completed Employee Action Form, job application, notes, and/or pre-employment proficiency tests to HR Partner for hiring approval.

# New Hires

1. After approval from HR Partner the Manager Partner will extend a non-binding verbal offer to the candidate and explain how the formal offer is made through DocuSign.
	1. Collect the candidate’s personal email address.
	2. Inform candidate that he or she will receive a New Hire Packet in their email.
2. HR Partner will initiate the electronic enrollment process through EGForce.
	1. Complete initial information section in EG Force with the employee’s legal name, email address and all other required fields as indicated in red.
	2. Employer’s Guardian will produce the Enrollment Packet in DocuSign within two hours.
	3. Hiring Administrator completes the management portion of the New Hire Packet.
	4. Employee completes their portion of the New Hire Packet
	5. On the first day of employment I-9 documentation is to be completed by the Manager Partner as first priority. Employees are added to time keeping system after this step is complete.
	6. Once complete, copies of the entire packet will be sent to the employee, Employer’s Guardian, and the HR Partner.

# Performance Improvement Plans (PIP)

1. Manager Partner will initiate a consult with Employer’s Guardian using EGForce, Email, or calling HR on Duty (HROD).
2. Employer’s Guardian will produce the Performance Improvement Plan within four hours.
3. Manager Partner provides employee feedback, presents Performance Improvement Plan, and attains signature. If the employee refuses to sign, please record “employee refused to sign” on the signature line.
4. Signed Performance Improvement Plan is to be scanned and filed in EGForce by the Manager Partner.
	1. The P.I.P. record in EGForce has a checkbox labeled “**P.I.P. Signed and On File”** that is to be checked after uploading. Reports are available to control missing PIPs.

# Leave of Absence (LOA)

1. When an employee notifies a Manager Partner of a potential need for a Leave of Absence, the Manager Partner will provide the employee with a Leave of Absence request form. Where appropriate, the Manager Partner will assist in completing needed information.
2. Manager Partner will notify HR on Duty of any employee who has requested a leave of absence same day as receipt. Notify all parties on a need-to-know basis.
3. HR will initiate an Leave of Absence case
	1. HROD will assign the HR Partner as the primary point of contact. They will be the liaison with the employee and HR on Duty.
	2. HROD will work with Management to determine if a Leave of Absence should be granted, and what type of protections will apply, if any.
	3. HR Partner will receive approved Leave of Absence notice that includes directions. Please forward notification of Leave of Absence start date.
	4. HR Partner will ensure that directions from the employee on what vacation or sick leave accruals they want to apply are communicated to Payroll.
	5. HROD to produce appropriate documents.
4. HROD will manage the life cycle of the Leave of Absence
5. The Manager Partners will track attendance in Elements.
	1. There are a set number of hours employees are entitled to receive based on the type of leave.
	2. Elements will be used to track full or partial days that were scheduled, but missed due to leave related concerns.
6. A week prior to the expected return date, the L.O.A. Primary Point of Contact must ensure that a properly completed medical release has been received before adding the employee back onto the schedule.
	1. The medical release must be forwarded to Employer’s Guardian for review.

# Accommodation Requests

1. Manager Partner will notify HR on Duty of any employee who is requesting adjustments to their work schedule or essential duties due to physical limitations. This has potential Americans with Disabilities Act mandates.
2. Employer’s Guardian will work with the Manager Partner and HR Partner to determine if an accommodation should be granted and what type of protections will apply, if any.
3. Where Americans with Disabilities Act Accommodation cases are warranted, they will be managed by Employer’s Guardian.
	1. The HR Partner will be notified throughout the interactive process.
4. Employer’s Guardian will coordinate through HR Partner to obtain medical certification.

# Attendance Management

Maintaining an accurate list of available employees to work is core to everyone’s success. Please make attendance management a daily priority.

1. Manager Partners will document employee unplanned absence or tardy using Elements in EGForce.
	1. Ask why the employee is missing work. If health related, do not ask for details. Do document any details that are given voluntarily. Respect the employee’s right to privacy.
	2. If the employee failed to call in, make sure to document attempts to contact the employee. (i.e. take a screenshot of the text, send the picture to the HR Partner, and record notes in the Elements Tool). Example:
		1. 2-17-2016 John didn’t report as scheduled; sent text; no response.
2. HR Partner is responsible for categorizing attendance events recorded in Elements. They have the training to determine if the reason for the event has legal protections. They will also assign a point value based on Company policy.

# Employee Separation

1. All terminations are to be approved by the HR Partner. The Manager Partner dealing with the employee issue can consult with HR on Duty about the best course of action before or after based on the situation.
2. Once a termination is approved:
	1. HR on Duty will produce a Change in Relationship used to formally document the termination in four hours. When urgent, please call Employer’s Guardian.
	2. Termination documents will be sent to the person requesting the termination, commonly HR Partner.
3. Terminations are not to occur without final wages in hand.
	1. Collect Company Property
4. Once all forms are signed by the employee and the Manager Partner, they should be uploaded into EGForce.

# Injury Reporting

* Manager Partners and Supervisors are responsible for the initial investigation of all injuries. Steps:
	+ Notify the client Safety Officer of any injury immediately. If not available, notify EG at 916-635-2543.
	+ The Safety Officer or Risk Partner will notify Employer’s Guardian as soon as possible to determine plan of action for treatment and claim reporting.
	+ EG will send an email to the person who reports the injury, with guidance for first aid determination and appropriate forms to complete.
	+ During normal business hours, EG will send an authorization for treatment to the nearest approved medical provider to ensure cost controls are in place. After hours, the client Safety officer or designated representative will authorize treatment.
		- Concentra is usually the first choice.
		- Risk partner will use the Concentra Authorization Form provided by EG to ensure protocols are followed at Concentra.
	+ The Manager Partner will begin their investigation immediately by completing the accident investigation form and taking pictures of all available evidence. The injured will complete an employee accident report form as soon as they are able.
	+ All injury documentation will be submitted to the Safety Officer, who will review and email to risk@employersguardian.com for review and filing in EG Force.
	+ EG will follow up with the injured, witnesses and Safety personnel to finalize the Investigation and corrective action plan.
* The Safety Officer or HR Partner will give insurance carrier reporting directions for EG to follow. All reporting will flow through EG.

# Workers' Compensation Claims and Expense Management

**Claims:**

* Safety Officer or Manager Partner to report injuries to EG for investigation.
* EG to report claims to carrier per client authorization.
* EG will work directly with the claims adjuster and broker.
* EG to be primary point of contact for client for purposes of efficiency. This will prevent the insurance adjuster from being overwhelmed by redundant questions or concerns.
* Claim status can be viewed in EGForce.
	+ EG will provide routine Claim Assessment Reports to client and Broker to report on progress, claim expense and strategize about cost control opportunities.

**Audits:**

* Audits will be handled at the offices of EG.
* Hiring Administrator will classify employees during the DocuSign enrollment process. HR Partner will update their classification as needed in EGForce.

# Drug Testing Management

* HR Partner will receive all drug testing notifications that apply via Advance Workplace Strategies (AWSI), such as Random Selections and Drug Test Results.
* Positive result notification will be provided by EG to the HR Partner via phone call in the interest of time.
* EG will complete the documentation of consequences associated with positive test results or policy violations using a PIP or Change in Relationship.
* HR, Risk and Manager Partners will receive Reasonable Suspicion Training from EG and consult with EG Risk Dept. prior to performing a Reasonable Suspicion Test.
* EG will setup Substance Abuse Professional assessments and rehabilitation programs for applicable employees that provide a positive specimen.