

## Custom Security Role

Name of the new Security Role: \_\_\_\_\_

Who does the role need access to? This can be a combination of criteria, check all that apply.

Employees that report to them

Certain Pay Group(s)

Name of Pay Group(s): \_\_\_\_\_ OR ALL pay groups except: \_\_\_\_\_

Certain Work Tax Locations.

Name of Work Tax Location(s): \_\_\_\_\_

OR ALL Work Tax Locations except: \_\_\_\_\_

Certain Positions or Employees

Name of position(s)/employee #: \_\_\_\_\_

OR ALL positions/employees except: \_\_\_\_\_

Certain Levels

Name of levels: \_\_\_\_\_

OR ALL levels except: \_\_\_\_\_

Other\*: \_\_\_\_\_

*\*We will do our best to accommodate all combinations of access but requests beyond the above parameters may be best suited for use of Supplemental Access. Please provide detailed information so we can review and advise.*

What does it need access to? Select one.

Everything in the system for the "Who" I listed above. This includes Employee Information and Payroll and any other modules.

Match an existing role but with access to the "Who" as I listed above. Name of role or employee with the access you seek to copy: \_\_\_\_\_

I want to customize a new role in the system. Please fill out page 2 of this sheet.





**Customization:** This is only necessary if you selected “I want to customize a new role in the system” above.

*We will do our best to accommodate your customization request. However, certain system functionalities must be grouped together within the access. Please provide detailed request information so we can review and advise what is possible within these groupings.*

What is this employee with this role doing?

- Only running reports (does **not** need access to employee profiles)
  - All Reports
  - Specific Reports: \_\_\_\_\_
- Managing specific module(s) - Please mark the modules they are managing below
- Viewing/managing employee profiles - Please mark the Pages the role should have access to within an employee record AND any module that you wish for them to manage those employees. Indicate if you would like the role to have “View Only” access.

System Modules	Employee Record Pages
<input type="checkbox"/> ACA <input type="checkbox"/> Asset Dashboard <input type="checkbox"/> Benefits <input type="checkbox"/> Dashboard – Add To Dos, Announcements <input type="checkbox"/> Expense Dashboard <input type="checkbox"/> HR Library <input type="checkbox"/> Incident Reporting <input type="checkbox"/> Management Log <input type="checkbox"/> New Hire <input type="checkbox"/> Payroll <input type="checkbox"/> Performance Reviews <input type="checkbox"/> Recruitment <input type="checkbox"/> Report Library <input type="checkbox"/> Scheduling <input type="checkbox"/> Surveys <input type="checkbox"/> Team tab/Access to Employee Profiles <input type="checkbox"/> Timekeeping <input type="checkbox"/> Training/Certifications	<input type="checkbox"/> Assets <input type="checkbox"/> Benefits <input type="checkbox"/> Career Profile/History <input type="checkbox"/> Certifications/Licenses <input type="checkbox"/> COBRA election <input type="checkbox"/> Contact Information <input type="checkbox"/> Direct Deposit <input type="checkbox"/> Document Library <input type="checkbox"/> Earnings/Deductions <input type="checkbox"/> Expense Reports <input type="checkbox"/> I-9s <input type="checkbox"/> Paystubs/Pay History <input type="checkbox"/> Performance Reviews <input type="checkbox"/> Progressive Discipline <input type="checkbox"/> Quick Calc <input type="checkbox"/> Quick Notes <input type="checkbox"/> Scheduling <input type="checkbox"/> Time Away from Work <input type="checkbox"/> Termination/Status Change <input type="checkbox"/> Timesheets <input type="checkbox"/> Update position information <input type="checkbox"/> Update pay <input type="checkbox"/> W-4s/Tax Information

