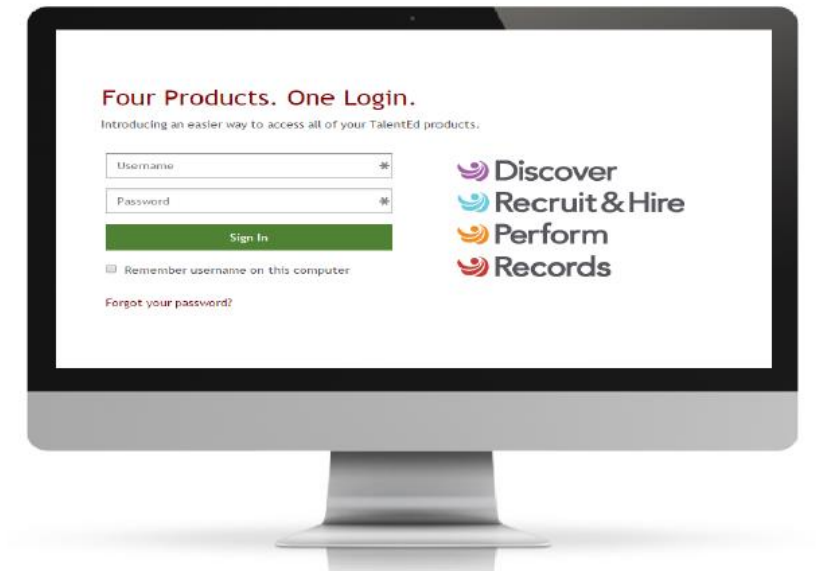
End User Guide

System Overview

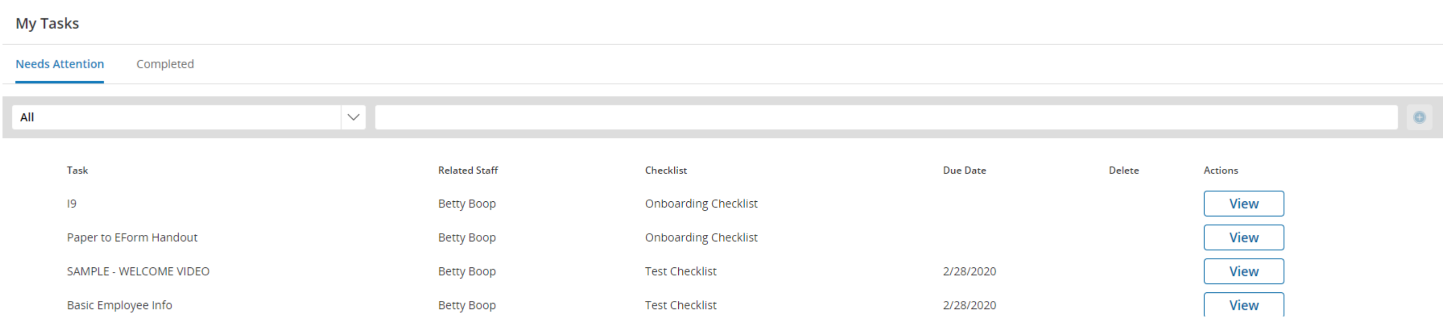
To begin Using Records, first log in using the credentials provided to you by your organization.

If it's your first time using Records, you will need to choose "Logging in for the first time" to create your own password.

If you have trouble logging in, you can click on the 'Forgot your password?' link to have an email sent to you to have your password reset.



My Tasks



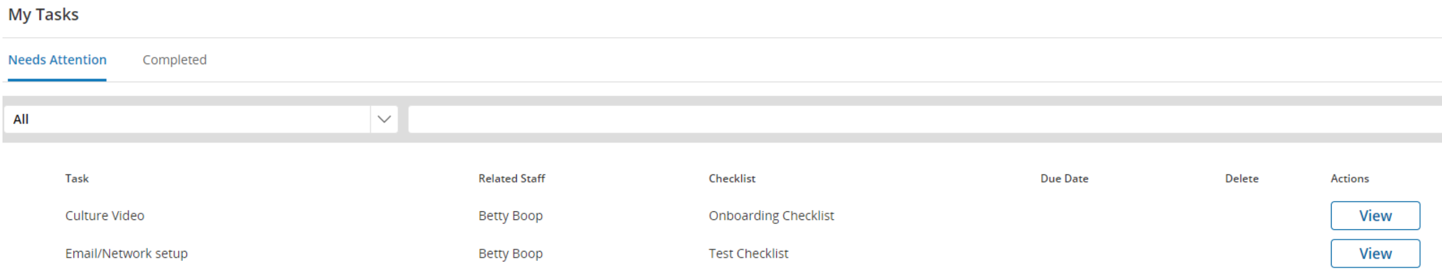
My Tasks

Needs Attention | Completed

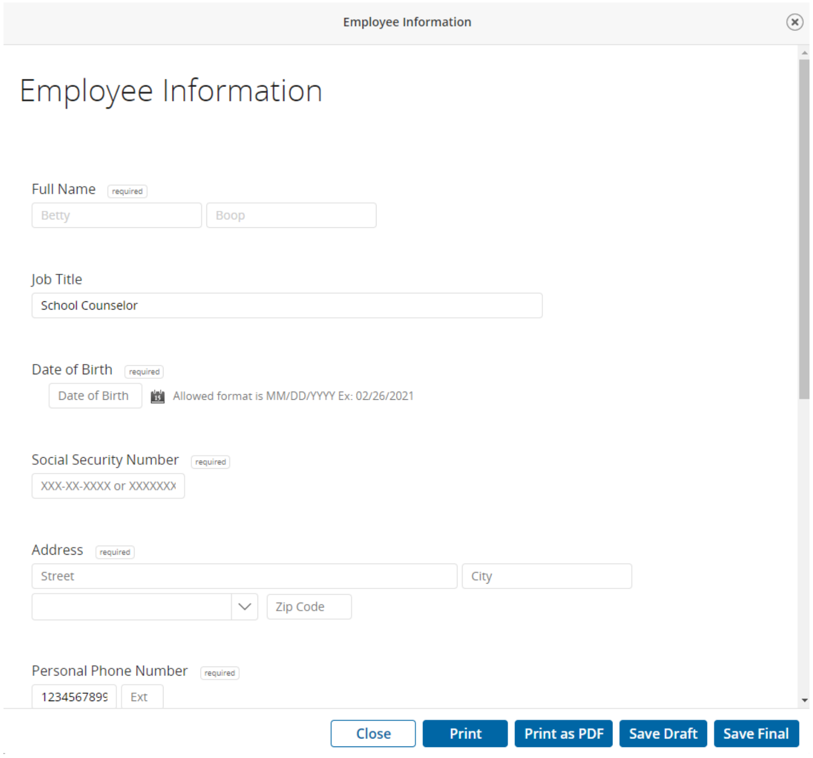
All

Task	Related Staff	Checklist	Due Date	Delete	Actions
I9	Betty Boop	Onboarding Checklist			View
Paper to EForm Handout	Betty Boop	Onboarding Checklist			View
SAMPLE - WELCOME VIDEO	Betty Boop	Test Checklist	2/28/2020		View
Basic Employee Info	Betty Boop	Test Checklist	2/28/2020		View

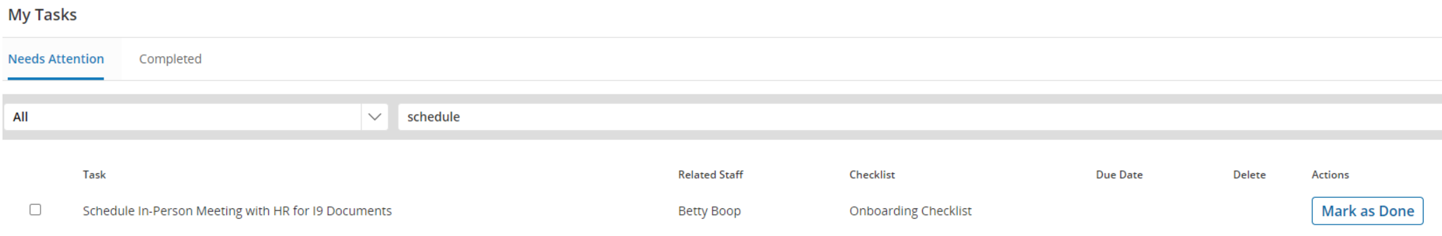
When you first log into Records, you will be taken to the **My Tasks** page. This is where you can view and complete any outstanding tasks you have been assigned. The **My Tasks** screen is where you can view all tasks you have been assigned through Records. You will notice there are two tabs on this screen.



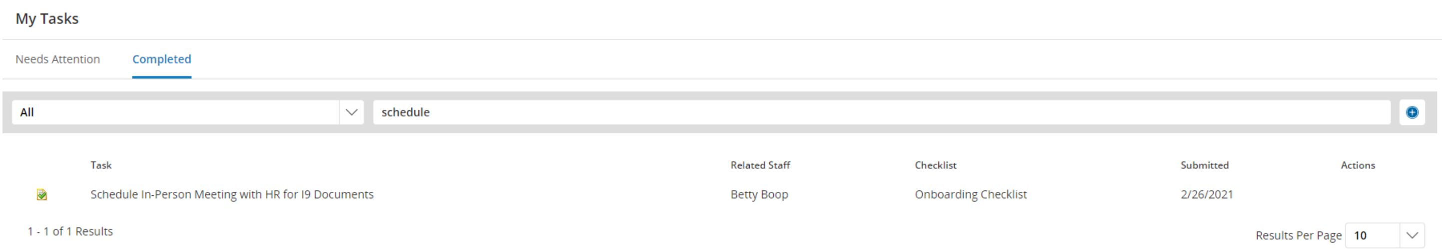
The **Needs Attention** tab will indicate which tasks still require action on your part. To take action, click **View** to open the form. You may be asked to fill out a new form or Sign or Approve a form that has been submitted to you.



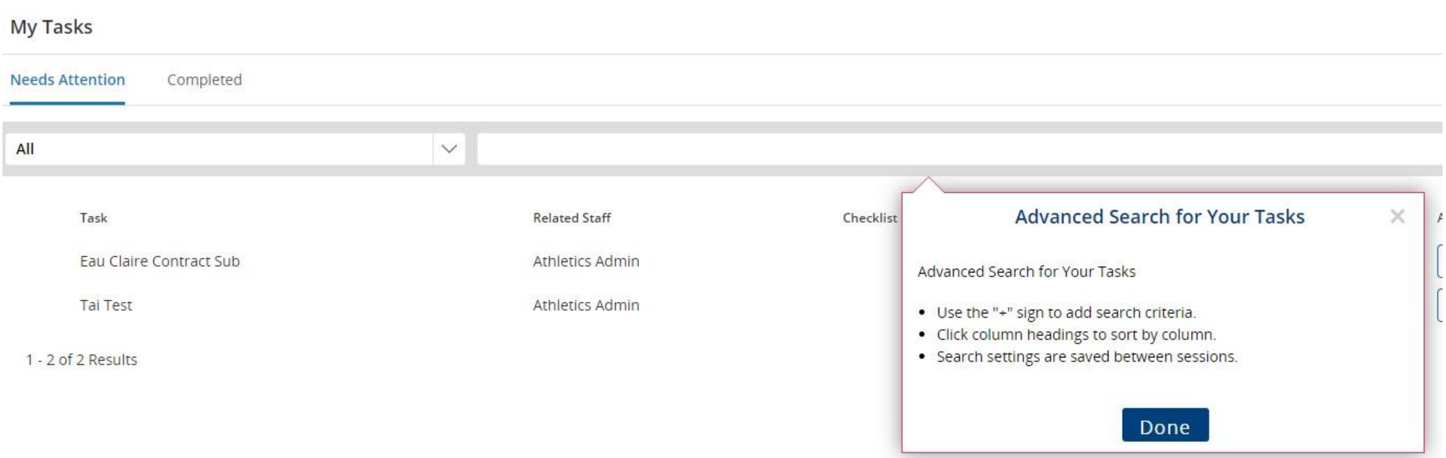
Some tasks are not associated with a form at all. These tasks will include a **Mark as Done** button next to them. When you have completed the appropriate tasks simply click Mark as Done to remove it from your Needs Attention list.



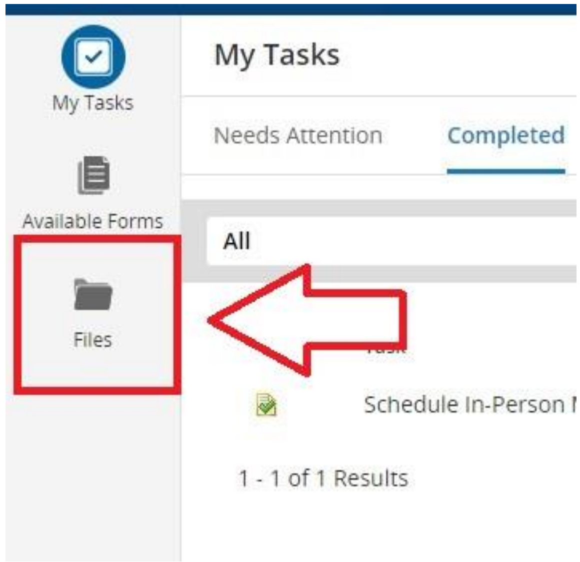
This page also includes a **Completed** tab for your reference. Keep in mind that tasks may not show up on your Completed tab immediately if they require a review or signature by other staff in your organization.

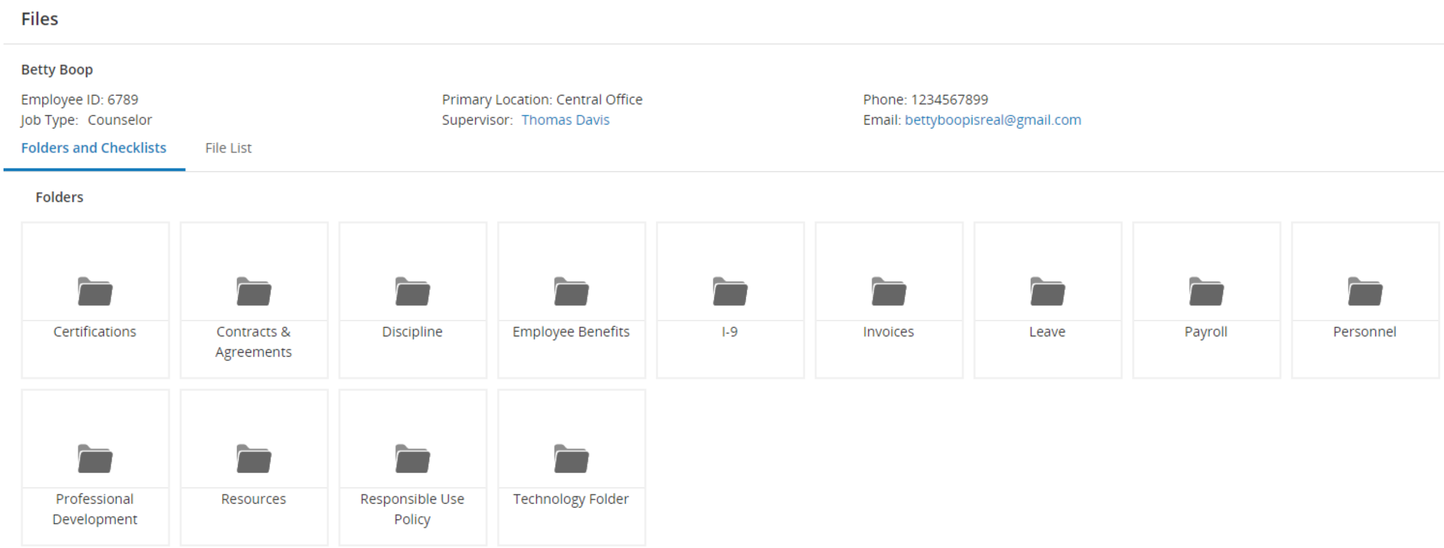


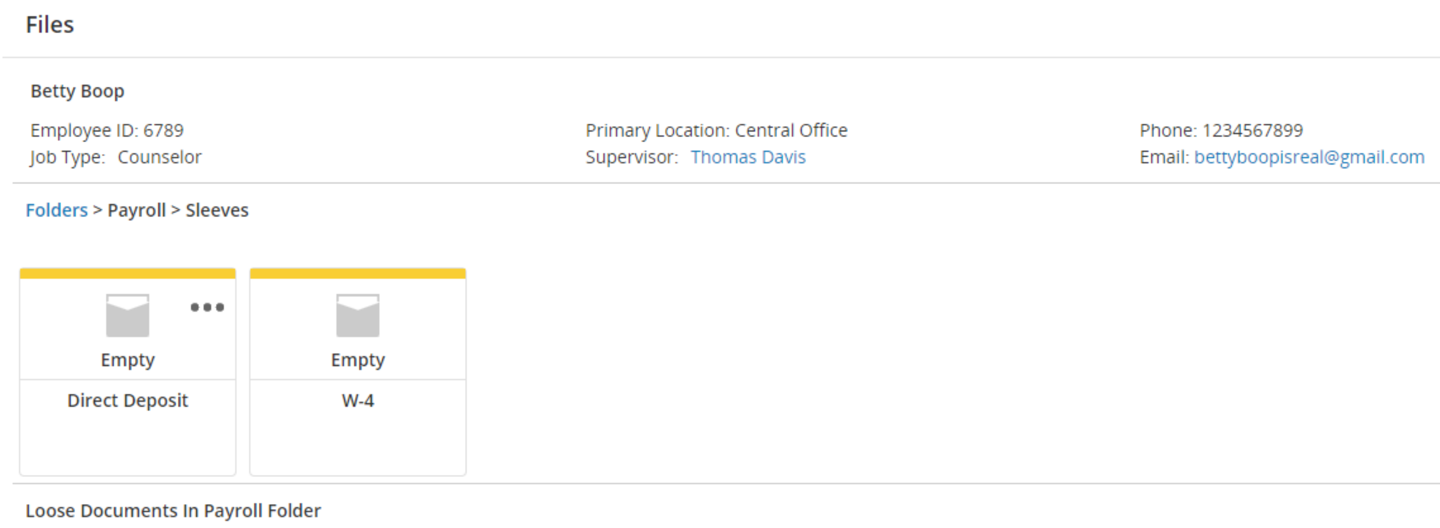
Use the search field to quickly locate a task in your task list.



Files


My Tasks
My Tasks
Needs Attention
Completed
Available Forms
All
Files
Schedule In-Person
1 - 1 of 1 Results

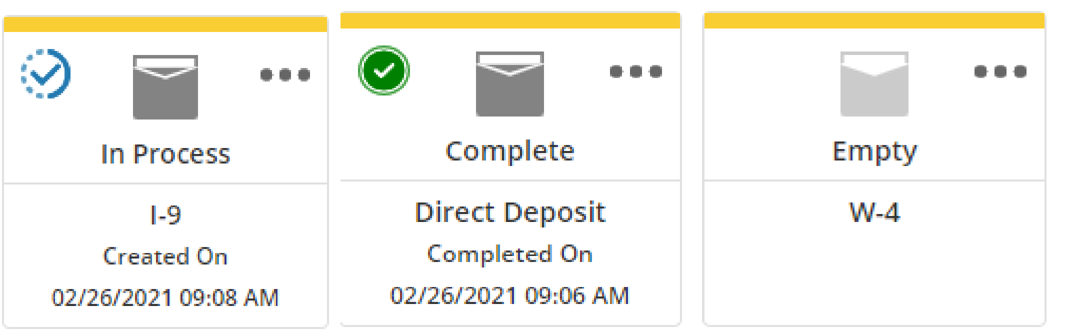

Files
Betty Boop
Employee ID: 6789
Job Type: Counselor
Primary Location: Central Office
Supervisor: Thomas Davis
Phone: 1234567899
Email: bettyboopisreal@gmail.com
Folders and Checklists
File List
Folders
Certifications
Contracts & Agreements
Discipline
Employee Benefits
I-9
Invoices
Leave
Payroll
Personnel
Professional Development
Resources
Responsible Use Policy
Technology Folder



Documents in Records are sorted into **Folders** based on the type of document. The first image shows a sample Folder structure you might see when you click on the Files button. This allows Payroll documents to be grouped together, Personnel documents to be grouped together, so on and so forth. Users will see different Folders based on the access they need.

Once allocated to a folder you can see how each Document is sorted into its unique individual **Sleeve**. The second image shows what a sample Payroll Folder might include.

-Sleeves will indicate whether they contain a completed e-form or document, if the document is in process, or they are empty.



Supervisor Tools

As a **Supervisor** you will have access to view Staff who report directly to you. Your view of Records will include a **Staff List** when you click the Magnifying Glass in the top, right side of the page. You can use the **Search** field to quickly find a staff member in the Staff List. Click on a staff member to open their files (you may see fewer files than you see for yourself based on the security settings defined by your system owner). You will also be able to track the progress your staff are making on any assigned **Checklists**. To move a staff member to the top of your Staff List, toggle the pin icon on the right side of the staff name. This will pin them to the top of your Staff List until you click the pin again to unpin them.