A more human resource.

ADP Workforce Now®

Setting Up Company Policies

Version 11

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Before you Begin

Attend Training

ADP Workforce Now provides online training that you can access through Learn@ADP in the Support Center (Support>Learn@ADP). It is recommended that you register for Client Service training for ADP Workforce Now.

To access this training:

1. Click **Client Service Login** and log in.
2. Click **Training Registration** and select the **ADP Workforce Now** link.

Setting Up Menu Access Permissions

Menu access permissions determine what menus (tabs) and menu items are available to profile members. There are two sets of permissions you can enable based on the requirements for your company:

- **Employee Permissions -** enable access for the company policy menu option for any profile containing employees that need to acknowledge company policies.
- **Manager Permissions** - enable access for policy acknowledgment status reports for any profile containing managers who must have access to the acknowledgment status for company policies of their direct and indirect employees.

Note: For information about using profiles, refer to the ADP Workforce Now online help topic **About Profiles**.

Setting Up Menu Access Permissions for Employees

Starting Point: Setup > Security > Access Permissions > Menu Access

1. Click the **Employee** link (profile type).
2. Click the employee profile group link for which you want to set permissions.
3. Click the **Menu Access** tab and then the **Resources** tab.
4. In the **Company Information** section, select the **Company Policies** check box and click **Save**.

Setting Up Menu Access Permissions for Managers

Starting Point: Setup > Security > Access Permissions > Menu Access

1. Click the **Manager** link (profile type).
2. Click the manager profile group link for which you want to set permissions.
3. Click the **Menu Access** tab and then the **My Team** tab.
4. In the **My Team** section, select the **Policy Status** check box and click **Save**.

Managing Company Policies

The following provides tasks for setting up a company policy and rolling it out to employees.

You can use ADP Workforce Now to distribute company policies to employees.

Note: The availability of the company policy feature and associated functionality depends on how your company is set up and your permissions for accessing this feature.

Working with your HR practitioner, you determine which employees should receive which policy, when they should receive it, and whether they need to acknowledge it. When a policy is ready to be distributed, you roll it out. You can also alert employees to the policy by:

- Having a message pop up when they log on to ADP Workforce Now. This message directs them to where they need to go to read or acknowledge the new policy.
- Sending them an email to let them know about the new policy.

Adding a Company Policy

When the content of a company policy is finalized and is ready to be distributed to employees—either as a document file or a link to the policy—you need to first set it up in ADP Workforce Now.

Starting Point: Setup > Tools > Manage Policies

1 Click ⊕ (**add**).

2 Enter the **Policy Name**. You can include letters, numbers, and special characters.

3 Enter a **Version Number**. You can include letters, numbers, and special characters.

4 Enter a **Description**.

5 Do one of the following:

- Select **Hyperlink** and enter the URL.

Note: It is recommended that you test the link before distributing it to employees to make sure it works as intended and that the employees can acknowledge the policy. If you link to an unsecure website, a warning message displays. This typically happens when your link uses http:// instead of https://.

- Select **Document** and upload the document as described on page 5.

6 If you want to require employees to acknowledge the company policy select **Acknowledgment Required**. Once you have selected **Acknowledgment Required**, you can also enter a custom policy message. The message you provide is shown when the employee is presented with the policy to acknowlege.

7 Select the **I agree . . .** check box. This is required in order to save the policy.

8 Click **Save**.

Adding a Company Policy in an Alternative Language

You can add company policies specific to a language and have it displayed when the employee selects the alternative language as a preference if your company is set up for the alternative language.

Note: For a language to be available, your company must have that language enabled. The company policy must be translated to the language before you add it.

Starting Point: Setup > Tools > Manage Policies

1. Select the **Preference** link and then the **Language** in which you want to add the alternate content. Click **Save**.
2. Click (**add**).

   Note: The Language field displays the default language of your company. Once the policy is established in your default language, you can add the policy in the alternate language.

3. Add the policy as described in “Adding a Company Policy” on page 3.
4. Once you have added the initial policy in the company’s default language, click (**add**) to create the additional content in the alternate language.
5. Select the **Language** of the policy you are adding.
6. Enter the **Policy Name**. You can include letters, numbers, and special characters.
7. Enter a **Version Number**. You can include letters, numbers, and special characters.
8. Enter a **Description**.
9. Do one of the following:
   - Select **Hyperlink** and enter the URL.

   Note: It is recommended that you test the link before distributing it to employees to make sure it works as intended and that the employees can acknowledge the policy. If you link to an unsecure website, a warning message displays. This typically happens when your link uses http:// instead of https://.

   - Select **Document** and upload the document as described on page 5.

   Note: You are responsible for the translation of any uploaded document to the alternate language.

10. If you want to require employees to acknowledge the company policy, select **Acknowledgment Required**. Once you have selected **Acknowledgment Required**, you can also enter a custom policy message. The message you provide is shown when the employee is presented with the policy to acknowlege.
11. Select the **I agree . . .** check box. This is required in order to save the policy.
12. Click **Save**.

Uploading Policies

Upload a document file from your hard drive to use as the company policy. You can upload DOC, DOCX, and PDF files.

Starting Point: Setup > Tools > Manage Policies

1. Click **Upload** from the Add New Policy or Edit Policy page.
2. From the File Uploader window, click **Add Files**.
3. Browse to your file, select it, and click **Open**.
4. Click **Upload**.

   The uploaded file is listed in the Document field.

Changing the Display Order

Control the order in which that you want the policies to display by assigning a positional number. If you do not assign a positional number to the policy, the policy displays in the order of its creation date.

Starting Point: Setup > Tools > Manage Policies

1. Click **Display Order**.
2. From the **Order** column, select a positional number for each policy you want to display in a certain order. Policies that have a positional number precede those that do not.
3. Click **Done**.

Deleting a Company Policy

You can delete a policy if it is pending or, in the case of new policies, one or more at a time.

Starting Point: Setup > Tools > Manage Policies

1. Do one of the following:
   - For a new policy or policies you want to delete, select each policy, click ⊕ **(action)** and select **Delete.**
   - For a pending policy you want to delete, click the name of the policy. Click **Delete (-)**.

Editing a Company Policy

For policies that are not part of an active or expired event, you can edit the policy name, description, and change whether or not acknowledgment of the policy is required.

Starting Point: Setup > Tools > Manage Policies

1. Click a **Policy Name.**
2. If you want to change the description, enter a new **Description**.

3 If you want to view the current policy, click **Preview**.

4 Do one of the following:

- To change the **Hyperlink**, enter a new URL.
- To add a new document, click **Upload**.
- To delete the current policy documnet and link to a different document, save the policy to a new name and version.
- To change the Start Date for the policy, select or enter a new current or future date. If the status of the policy is active, the start date cannot be changed.

5 If you want to change the acknowledgment requirements, clear or select **Acknowledgement Required**.

6 Click **Save**.

Hiding a Company Policy or Making it Visible

Starting Point: Setup > Tools > Manage Policies

1 To hide a policy from emploee's view, click (**action)** for a policy and select **Hide Policy.**

2 To make a policy visible to employee's, click (**action)** for a policy and select **Make Visible.**

Rolling Out a Company Policy

You can assign security profile groups, select the start date, and publish the policy for acknowledgement. All selected policies are published and sent as one message in the message center to members of the selected security profile groups.

Starting Point: Setup > Tools > Manage Policies

1 Click the selection checkbox for each of the policies you want to roll out.

2 Select the **Start Date**. The date must be the current date or a future date.

3 Click **Roll Out**.

4 Move the security profile groups you want to associate with the policy from the **Available** to the **Selected** area.

5 Click **Publish**.

Send or Resend an Email Reminder

The same procedure is used whether sending or re-sending an email.

Starting Point: Setup > Tools > Manage Policies

1. Click **(action)** for a policy and select **Send Notification**.
2. Do one of the following:
   - To send the notification to all employees that are part of the security profile groups listed in **To Profiles,** select **Everyone.**
   - To send a reminder email only to employees that have not acknowledged the policy, select **Employees who have not completed the activity**.
3. Enter the **From** email address.
4. Enter the **Subject** of the email.
5. Enter the content of the email in the **Body** area.
6. Click **Done**.

Activating or Inactivating a Company Policy

If a company policy has a status of Inactive, you can change it to Active. If a company policy has a status of Active, you can change it to Inactive.

Starting Point: Setup > Tools > Manage Policies

Do one of the following:

- To change the status to Inactive, cclick **(action)** for a policy and select **Inactivate**.
- To change the status to Active, click **(action)** for a policy and select A**ctivate**.

Purging a Company Policy

When you purge a company policy, you are permanently removing policy acknowledgment data that cannot be recovered. Before purging a company policy, you should view and export the policy acknowledgment data. Only company policies with an Inactive status can be purged For more information, see "Activating or Inactivating a Company Policy ".

Starting Point: Setup > Tools > Manage Policies

1. To purge a company policy, click **(action)** for an inactive policy and select **Purge Policy**. The Purge Policy message displays.
2. Do one of the following:
   - Click **Purge** to continue permanently removing the company policy along with its acknowledgment data, and click **Yes** to confirm.
   - Click **No** to cancel the purge process.

Changing an Assigned Profile of a Company Policy

All selected policies are published and sent as one message in the Message Center to members of the selected security profile groups.

Starting Point: Setup > Tools > Manage Policies

1. Click a **Policy Name**.
2. Click **Edit Profiles**.
3. Move the profiles you want to assign to or from the **Selected** area.
4. Select the **I agree . . .** check box.
5. Click **Save**.

Viewing Acknowledgment Status

Starting Point: Setup > Tools > Manage Policies

1. Click **(action)** for a policy and select **View Report**s. From **Status**, do one of the following:
   - Select **Acknowledge** to view employees who have acknowledged the policy.
   - Select **Not Acknowledged** to view employees who have not acknowledged the policy.
2. Click **View** and the employees with the selected statuses are listed.

Export Acknowledgement Data to a CSV File

Starting Point: Setup > Tools > Manage Policies

1. cClick **(action)** for a policy and select **View Reports**.
2. Click **Other Actions** and select **Export to .CSV**.
3. Enter a **Report Name** and, optionally, a **Report Description**. Acknowledged and unacknowledged statuses are included in the report.
4. Click **OK.**

   Once the message displays that the report has been exported, you can click O**ther Actions > View Exported Reports**.

Viewing Exported CSV

Starting Point: Setup > Tools > Manage Policies

1. Click **(action)** for a policy and select **View Report**.
2. Click **Other Actions** and select **View Exported Reports**.
3. Click a **Report Name.**

4 Do one of the following:

- To open the file with the indicated program, select **Open with**.
- To save the file to your computer, select **Save File**.

5 Click **OK**.