

About the Spreadsheet

Name	HA-HR-4410-X. Employee Data Spreadsheet
owner	HR
access & use	This document includes sensitive and confidential information. Access and use are restricted to HR.
what it is	Master HR employee information spreadsheet used to manage and report employee data.
who uses it	HR
used for	Capturing, tracking and reporting employee data.

This template is included in the ConnectsUs HR™ Toolkits.



Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
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- Weekly updates, email notifications
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Create HR for Clients

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Tips

- ◆ To get the best results from Excel, keep your worksheets free of unnecessary information – refrain from adding anything but the data you need. Remove logos, dates, titles, etc. Use the Headers and Footers to include logos, dates and titles, etc.
- ◆ Always password-protect the workbook.

Excel Functionality used in this Workbook

Freeze Panes

To facilitate data viewing and entry, the spreadsheet's first 4 columns and the header row are locked.

To unlock this functionality, click on the **View** tab, **Freeze Pane**, and **Unfreeze Pane**.

Data Validation & Named Ranges

This workbook uses the **Data Validation** function to generate **Named Ranges** to facilitate accurate data entry and reporting. You can tell if a column contains **Named Ranges** functionality if there is a drop-down arrow in a cell when you click on it, and if the heading is in blue font.

A	B	C	Y	Z
Staff #	Preferred First Name	Last Name	Eligible for Standard Benefits? Y/N	Annual Vacation Days
C0001	Heather	Crick	N	

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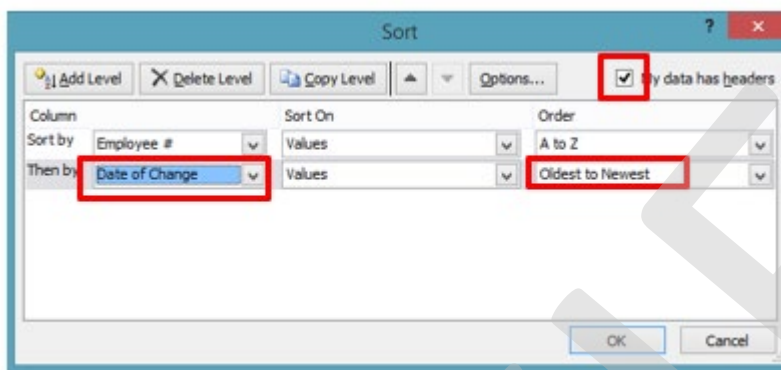
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To add new information for an existing employee:

1. The employee and/or HR complete the **HA-HR-4400-M. Employee Status Change Form**
2. Sort the worksheet by **Employee #** and **Date of Change**. Sort the **Date of Change** level by Oldest to Newest so that the most recent transaction is at the top.



3. Place your cursor on the Row number that shows the most recent change.
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	A	B	C	Y	Z	AA	AB	AC	AD
	Staff #	Preferred First Name	Last Name	Eligible for Standard Benefits? Y/N	Annual Vacation Days	Formal/Legal First Name (if different from preferred)	Middle Name	Date of birth MM-DD-YY	Age
1									
2	C0001	Heather	Crick	N	0			1964-09-12	57.4
3	B0003	Mary	Jones	Y	16		Elizabeth	1985-03-15	36.9

Place your cursor here.

4. Right-click and select **Copy** to select the entire row.
5. Place your cursor on the row number where you want to insert the information; i.e., in the row directly above it

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When you want to see either the staff member's historical changes or the most current data row for that individual, use the filter function.

1. On the **Data** tab, click on **Filter**. You'll notice drop down arrows on your column headers.

A	B	C	D	E	F	G	H	I	J
Staff #	Preferred Pronoun	Preferred First Name	Last Name	Reason for Data Entry	Date of Change YYY-MM-DD	Engagement Status	Hire Date	Length of Service (yrs)	Title
C0001		Heather	Crick	New Hire	2014-02-12	Active	2014-12-02	7.2	Software Developer
F0003	They	Mary	Jones	Part time 4 days/wk, vacation, salary change	2020-03-22	Active	2015-02-16	6.9	VP, Sales

2. Click on the arrow in the **Staff #** column.
3. Uncheck "Select All".
4. Check the staff member's **Staff #** you would like to review.
5. Click **OK**.
6. You will now see all historical transactions for that staff member. The latest current data will be shown in the first row.

Staff #	Preferred Pronoun	Preferred First Name	Last Name	Reason for Data Entry	Date of Change YYY-MM-DD	Engagement Status	Hire Date	Length of Service (yrs)	
E0003	They	Mary	Jones	Part time 4 days/wk, vacation, salary change	2020-03-22	Active	2015-02-16	6.9	VP,
E0003	They	Mary	Jones	Vacation Days change	2019-03-22	Active	2015-02-16	6.9	VP,
E0003	They	Mary	Jones	promotion: Salary, Title change	2017-03-22	Active	2015-02-16	6.9	VP,
E0003	They	Mary	Jones	New Hire	2015-02-16	Active	2015-02-16	6.9	Dire

7. When you want to cancel the filter, on the **Data** tab, click on **Filter** to disable it. You'll notice drop down arrows on your column headers will disappear.

Creating Reports

You'll have to create a copy of the EDS to run reports because each staff member may show numerous rows, where each staff member change is represented by a new row. Running a report with duplicate employee rows will not be possible.

1. Save a new copy of the Spreadsheet. **The current master EDS must never be used to create reports.**

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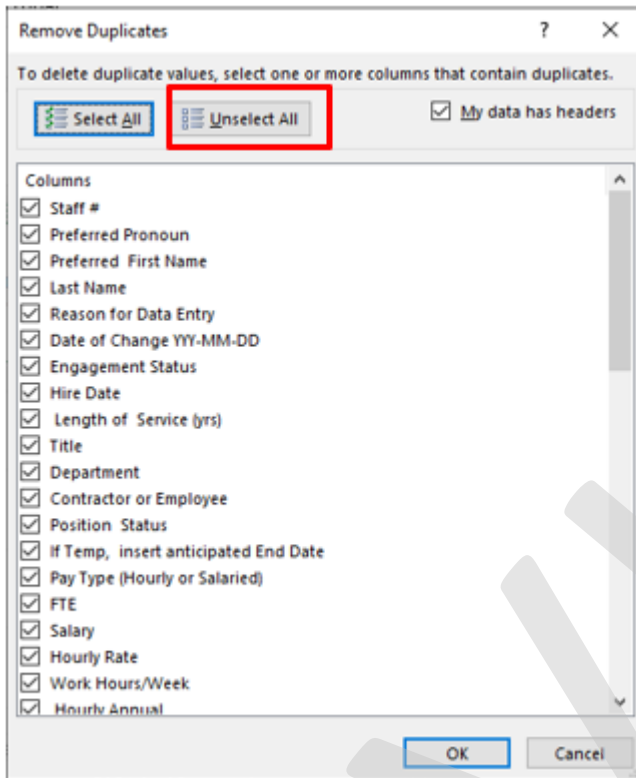
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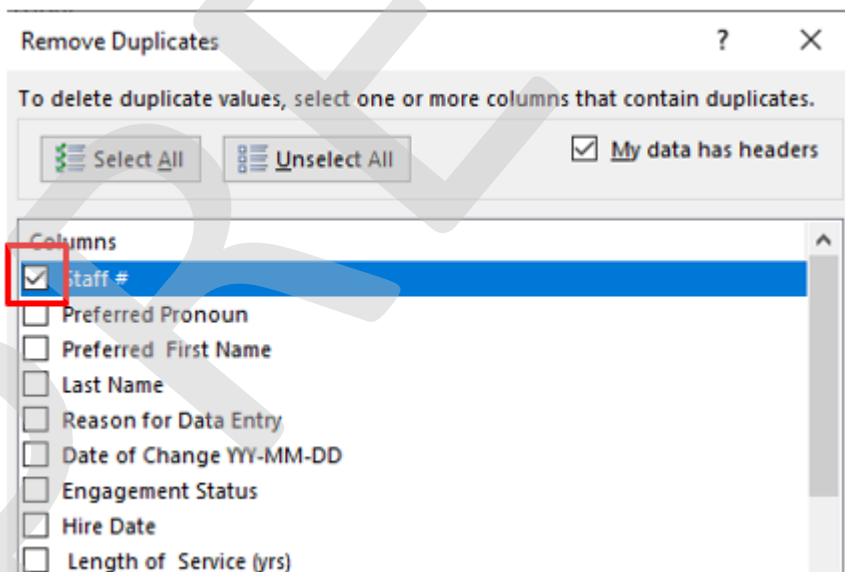
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5. Place a check mark for **Staff #**



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Column	Details	Drop Down functionality
M.	Position Status From the drop-down list, select the Position Status. This field is also applicable to contractors. Note that Full Time and Part-Time are for “regular” staff - used to describe positions that are ongoing instead of the term “permanent” to more accurately describe today’s changing and competitive work environment.	Yes
N.	If Temp, insert anticipated End Date	
O.	Pay Type (Hourly or Salaried)	Yes
P.	FTE From the drop-down menu, enter the FTE – the full-time equivalent of the position. Based on a 40-hour work week. For example: <ul style="list-style-type: none"> • Full-time = 1.0 • Part-time, 4 days/week = 0.80 • Part-time, 3 days/week= FTE is 0.60 • Part-time, 2.5 days per week = 0.50 	Yes
Q.	Salary Enter the annual salary if salaried employee	
R.	Hourly Rate Enter the hourly rate only if an hourly staff member	
S.	Work Hours/Week Enter the expected work hours per week. If unknown, enter approximation.	
T.	Hourly Annual Calculated field that only calculates an annualized salary for hourly staff where data is entered for Hourly Rate column.	
U.	Work Hours/Year Calculated field that calculates annualized work hours based on data in the Hours per Week column.	
V.	Job Type References Job Classification. Choose from drop down options.	Yes
W.	Manager Enter the last name of the staff member’s manager.	
X.	Department Head Enter the last name of the staff member’s head of department.	

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AT	EC 1 Relationship	
AU	EC 1 Phone 1	
AV	EC 1 Phone 2	
AW	EC 1 Email	
AX	EC 2 Enter the name of the staff member's second Emergency Contact	
AY	EC 2 Relationship	
AZ	EC 2 Phone 1	
BA	EC 2 Phone 2	
BB	EC 2 Email	
BC	High School Indicate if the staff member has a high school diploma	Yes
BD	Post-Secondary Indicate if the staff member has a post secondary degree	Yes