

# Employee Certificate, Checklist and Preferences

## Employee Certificate

The Employee Certificate can be uploaded in the system by using the Certificate Tab. Click + Add Certificate option, update the required information and upload the Certificate.

**Employee Tab >> List >> Employee Name >> Certificate**

The screenshot shows the 'Add Certificate' modal form. The form has a title bar with a close button (X). Below the title bar, there are tabs: 'Employee Information', 'Employee Document', 'Employee Schedule', 'Personal Time Off', 'Calendar', 'Notes', 'Certificate' (selected), 'Checklist', and 'Preferences'. The 'Certificate' tab is active, and a green 'Add Certificate' button is visible in the top right corner. The form itself contains the following fields:

- Name\***: A text input field with a red asterisk and a red vertical bar on the left.
- Certificate Authority\***: A dropdown menu with a red asterisk and a red vertical bar on the left.
- Valid From\***: A date input field with a red asterisk, a red vertical bar on the left, and a calendar icon on the right.
- Valid To\***: A date input field with a red asterisk, a red vertical bar on the left, and a calendar icon on the right.

Below the fields, there is a blue button with a plus icon and the text 'Upload Certificate'. A note in red text states: 'Note\*: Preferable file ratio: 1:4 (80 X 320) and maximum allowed file size: 2MB.' At the bottom of the form, there are two buttons: a red 'Cancel' button and a green 'Save' button, which is highlighted with a red border.

## Employee Checklist

The user can check the documents in the checklist and update the Expiration date and Date of Completion in the checklist.

**Employee Tab >> List >> Employee Name >> Checklist**

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Checklist

Name

Marry Delna

Email

delnamarry@gmail.com

Date

06/07/2023

Address

Aathir Ladies Hostel

Cell

Cell

Mobile Phone

Mobile Phone

Identification Requirements	Expiration Date	Date of Completion
<div><input type="checkbox"/> Driver's License <input type="checkbox"/> State ID <input type="checkbox"/> Alien Card <input type="checkbox"/> Passport</div> <div>Copy of one, but if ALIEN, copy of Alien Card is required</div>	<div>MM/DD/YYYY</div>	<div>MM/DD/YYYY</div>
<div><input type="checkbox"/> Copy of SS Card</div>	<div>MM/DD/YYYY</div>	<div>MM/DD/YYYY</div>
Competency and Continued Competency Requirement		
<div><input type="checkbox"/> RN <input type="checkbox"/> LPN <input type="checkbox"/> LSW <input type="checkbox"/> CNA <input type="checkbox"/> Other</div>	<div>MM/DD/YYYY</div>	<div>MM/DD/YYYY</div>
<div><input type="checkbox"/> Current Certificate of Continuing Education or Training</div>	<div>MM/DD/YYYY</div>	<div>MM/DD/YYYY</div>
<div><input type="checkbox"/> Current Resume</div>	<div>MM/DD/YYYY</div>	<div>MM/DD/YYYY</div>

# Employee Preferences

The user can update the Employee Preferences by using the Preferences option. Check the Preferences from the list and click Save Notification Preferences option.

Employee Tab >> List >> Employee Name >> Preferences

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Notification Preferences

☐ Send Email

☐ Send SMS

☐ Web notification

☐ Mobile-app notification

Save Notification Preferences

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