

Manager's **Quick Guide** to Insperity



Hiring and Onboarding

Insperty® provides a host of services to help you source and hire new employees. Follow the path below to access more information from Insperty Premier™ at portal.insperty.com or contact your Insperty® human resource (HR) specialist.

Insperty Services	How to find on Insperty Premier™
Job Descriptions Review and/or create job descriptions to describe a position's essential duties, qualifications and physical demands.	COMPANY>MANAGE PERFORMANCE ▶ Job Descriptions
Salary Data Access salary information for your area and industry to evaluate whether your salary ranges and compensation program are competitive.	COMPANY>MANAGE PERFORMANCE ▶ Compensation Resources
Employment Applications Utilize a standard employment application packet compliant with federal laws.	COMPANY>RECRUITING>HELPFUL LINKS ▶ Applicant Online Forms, Packets and Instructions
Recruiting Services Assistance in all aspects of the recruiting process gives you the ability to recruit and retain the most professional and qualified talent. Insperty offers a comprehensive recruiting solution, customized to fit your recruiting needs, whether you are hiring your next key employee or a team of hundreds.	COMPANY>RECRUITING>DEVELOP A STRATEGIC FOUNDATION ▶ Interview and Selection Skills Training 877-MY-HIRES (877-694-4737)
Pre-Employment Screening Discounted fees for: <ul style="list-style-type: none">• Cognitive and skills assessments• Employment verification and drug testing	COMPANY>RECRUITING>REFINE CANDIDATE POOL ▶ Assessments ▶ Background Checks OR ▶ Drug Testing
Compliance with Hiring Laws Consult with your Insperty HR specialist regarding Equal Employment Opportunity regulations, hiring of minors, Fair Labor Standards Act exempt status and much more. Insperty offers training for managers on interviewing and selection skills, performance management, diversity, discrimination and harassment prevention, and general HR fundamentals for supervisors. Training for supervisors is structured to heighten awareness of federal and state laws as well as best HR practices.	COMPANY>REGULATORY AND COMPLIANCE ▶ Government Compliance MY ACCOUNT>TRAINING>TRAINING ADMINISTRATION SUPPORT ▶ Liability Management Classroom Training
Onboarding Self-Paced Orientation <ul style="list-style-type: none">• New employees should view the Self-Paced Orientation on Insperty Premier™ to receive enrollment instructions and learn about available benefits. New Hire Paperwork <ul style="list-style-type: none">• Paperless onboarding for new hires, including all federal and state requirements depending on employee location• I-9 E-Verify compliance assistance• Paper enrollment also available if needed	MY ACCOUNT>BENEFITS>HELPFUL LINKS ▶ Employee Self-Paced Orientation COMPANY>MANAGE EMPLOYEES>ONBOARDING>ADD EMPLOYEE ▶ New Employee
New Hire Health and Welfare Benefits Eligibility and Enrollment <ul style="list-style-type: none">• Documents to be Distributed to New Employees: New employees should be given a benefits packet consisting of (i) a Health and Welfare Benefits Book, (ii) a Group Health Plan Contribution Report and (iii) a Cigna Voluntary Benefits Enrollment Booklet. Employees of clients that are "Applicable Large Employers" (ALEs) should also be given an ALE Employee flyer titled "How Insperty Determines Eligibility for Health and Welfare Benefits Plans for Employees of "Applicable Large Employer" (ALE) Clients." These materials can be ordered from your payroll specialist.• Eligibility Rules: To enroll in Insperty-sponsored health and welfare benefits, employees must meet certain eligibility rules, including the requirement to work 30 or more hours per week, on average (20 or more hours in Hawaii). For more information on eligibility rules, see "Eligibility Rules for Insperty Health and Welfare Benefits" in the Onsite Supervisor Guide.• Enrollment Period: Employees have 30 days (or any longer period required by state law) from the date they become eligible for coverage to enroll in benefits.• Enrollment Process: Paperless online benefits enrollment is the preferred method of enrolling. Paper enrollment forms are available but should be used only by employees who do not have the ability to enroll online and should be sent directly to Insperty as instructed on the form once completed. Paper enrollment forms can be ordered from your payroll specialist. For more information on the enrollment process, including how employees can access the online enrollment tools, see "Employee Enrollments" in the Onsite Supervisor Guide.	MY ACCOUNT>BENEFITS ▶ New or Existing Employees or call our Contact Center 866-715-3552 contact_center@insperty.com Chat online at portal.insperty.com . Choose "Contact Us" to start the conversation.

Employee Maintenance

Employees can access all their data 24/7 through Insperty Premier™ at portal.insperty.com. Follow the path below to access more information or contact your Insperty® human resource (HR) specialist.

Insperty Services

How to find on Insperty Premier™

Employee Information Changes

Employees can access and/or make changes to certain personal information online. All employment and payroll changes must be made by an authorized user via the online or paper form.

DROP-DOWN ARROW TO THE RIGHT OF EMPLOYEE NAME IN HEADER

or call our Contact Center
866-715-3552
contact_center@insperty.com

Chat online at portal.insperty.com.
Choose “**Contact Us**” to start the conversation.

Employee Payroll Information

Submit changes using Manage Employees when any of the following occur:

- Job function/title change
- Change in job classification (full-/part-time, exempt/nonexempt)
- Pay rate increase
- Change in department, location, billing group or client number
- Worksite location
- Workers' Compensation Code

A paper form will also need to be submitted along with the online changes for:

- Pay reduction – employee signature required
- Change in exemption status from nonexempt to exempt – employee signature required

Online:
COMPANY>MANAGE EMPLOYEES
▶ Manage Employees

Paper:
**COMPANY>FORMS AND
POLICIES**
▶ Payroll - Forms>Employee
Information
▶ Employee Change of Status
(PDF)

Mid-Year Benefits Changes

Outside of new hire or open enrollment, any mid-year election change to an employee's health coverage must generally be on account of and consistent with a qualifying mid-year change event that affects eligibility for the Insperty-sponsored group health plan or another employer-sponsored group health plan. In addition, a mid-year election change must generally be made within 30 days of the date of the qualifying event.

Examples of qualifying change in status events are:

- Change in legal marital status
- Change in number of dependents or dependent eligibility requirements

Employees can make a mid-year election change online by choosing the *Mid-Year Change Designation* form on Insperty Premier™ under **Company>Forms and Policies>Benefits Forms>Enrollment or Change**. With the exception of a mid-year election change relating to a court order, supporting documentation is not required. If online access is not available, paper forms should be sent by the employee directly to Insperty.

**MY ACCOUNT>BENEFITS>
MID-YEAR CHANGE>ACCESS NOW**
▶ Mid-Year Events

or call our Contact Center
866-715-3552
contact_center@insperty.com

Chat online at portal.insperty.com.
Choose “**Contact Us**” to start the conversation.

Leave of Absence

When notified that an employee will be away from work for serious personal health reasons, birth of an employee's child, to care for a family member, military leave or workers' compensation for three or more days, the supervisor must complete the *Leave of Absence Request* form and submit it to Insperty. Insperty HR specialists can guide you through the interactive process and Americans with Disabilities requirements.

**MY ACCOUNT>BENEFITS>
ADDITIONAL BENEFITS**
▶ Leave of Absence

Training and Development

In order to assist in supporting specific business goals and individual skill development, Insperty offers several different learning modes. Visit the Training page to learn about the live, virtual training and self-paced online training resources available to you. Reach out to anyone on your service team for more information.

**MY ACCOUNT>TRAINING>HELPFUL
LINKS**
▶ Training Administration Support

Insperty Employee Assistance Program (EAP)

Employees may contact the EAP for confidential support, counseling and help with customized resources and referrals on home life topics, stress, domestic violence, health education and legal referrals. EAP is also available to provide onsite counseling at your company for any situation that produces a strong emotional response to a catastrophic or shocking event, threat to safety or well-being of self or someone close.

**MY ACCOUNT>BENEFITS>
ADDITIONAL BENEFITS**
▶ Insperty Employee Assistance
Program
866-402-0003

Workers' Compensation Claims

It is critical that an employee injury be reported immediately to comply with state laws. We recommend that the accident/injury information be completed on the *First Report of Injury Workers' Compensation Notification* form prior to calling. This can be found in the Sedgwick Welcome Kit.

Review your clinic/physician panel to locate a treatment facility.
A *Treatment Authorization* form can be sent along with the injured worker as proof of insurance coverage.

**COMPANY>REGULATORY AND
COMPLIANCE**
▶ Workers' Compensation
▶ Job-Related Injury
▶ Certificate of Insurance
▶ Medical Provider Information
▶ Workers' Compensation Claim
Contacts

Safety

Assistance in making the workplace safe, including industry-specific policies, programs, training and Occupational Safety and Health Administration compliance support can be obtained online or by contacting the Insperty Safety Services group.

**COMPANY>REGULATORY AND
COMPLIANCE**
▶ Safety
▶ Safety Review
Safety@insperty.com

Employee Relations and Terminations

The ultimate goal is to have productive and engaged employees who will help your company succeed. If disciplinary issues arise, you should try to mitigate potential legal action or government investigation by using the tools that Insperity has to offer you. Follow the path below to access more information from Insperity Premier™ at portal.insperity.com or contact your Insperity® human resource (HR) specialist.

Insperity Services	How to find on Insperity Premier™
Coaching, Counseling and Discipline Promptly document coaching conversations and events as they occur and address infractions by using Insperity-provided tools and templates (counseling statements, coaching logs and performance improvement plans).	COMPANY>MANAGE PERFORMANCE <ul style="list-style-type: none">▶Coaching▶Counseling
Performance Management Systems Performance appraisals should provide an employee with a clear understanding of performance expectations. The verbiage used is critical and your HR specialist can assist you with tools and resources.	COMPANY>MANAGE PERFORMANCE <ul style="list-style-type: none">▶Performance Appraisal Process
Liability Management Employees and managers at your business have access to a variety of training that can lead to the right behaviors desired in the workplace. Work with your Insperity HR specialist to develop an employee handbook and employment policies explaining your expectations in the workplace.	MYACCOUNT>TRAINING>HELPFUL LINKS <ul style="list-style-type: none">▶Training Administration Support▶Training Administration Tools, Guides and Resources▶Liability Management Classroom Training Contact your Insperity HR specialist for assistance with an employee handbook.
Anti-Harassment and Discrimination Hotline Hotline for employees to call or email if they have concerns related to their employment that may be due to discrimination or harassment incidents in the workplace.	844-677-3030 or eeoteam@insperity.com
Employment Practices Liability Insurance (EPLI) If you receive an EEOC charge or an attorney demand letter involving your employees, former employees or an applicant, forward it to our EEO team or your Insperity HR specialist.	Contact your Insperity HR specialist or eeoteam@insperity.com
EEO-1 Reporting and Government Contractor – Related Reporting Questions Insperity will file the required EEO-1 Report for companies with 100 or more employees and those with federal contracts that are required to submit the report.	281-312-3096 or eeoteam@insperity.com
Employee Verification All employment verification inquiries should be directed to the Insperity Employment Verification Group.	COMPANY>RECRUITING>HELPFUL LINKS <ul style="list-style-type: none">▶Request an Employment Verification 866-715-3552, ext. 5
Layoffs How you handle an employee separation may mean the difference between a costly lawsuit and a smooth transition. Your HR specialist can assist you with your decision to conduct a layoff or provide solutions to avoid layoffs.	Contact your Insperity HR specialist
Terminations Contact your HR specialist to discuss the reasons for termination to ensure all resources have been exhausted before terminating an employee. Once the decision has been made to terminate an employee, send a completed <i>Employee Termination</i> form immediately to your Insperity payroll specialist to ensure compliance with applicable wage and hour laws. It is imperative this form is submitted no later than the day of termination.	Contact your Insperity HR specialist
Separation and Release Agreements Should you elect to offer severance or separation pay, Insperity will provide a standard separation agreement upon request. The consideration paid should be something to which the employee is not otherwise entitled. Your HR specialist can assist you with completing this process.	Contact your Insperity HR specialist
Consolidated Omnibus Budget Reconciliation Act (COBRA) Benefits terminate as of midnight on the last date of employment or in accordance with state laws. COBRA forms are sent to terminated employees within two weeks of the effective termination date, where applicable. (Note: In certain situations, employees who are Texas residents may be eligible to have their medical coverage extended through the end of the month in which they terminate. UnitedHealthcare administers this extension and employees who are Texas residents should contact UnitedHealthcare to determine if this rule will apply to them. Insperity does not control this coverage extension or track the impacted employees.)	MY ACCOUNT>BENEFITS>HELPFUL LINKS <ul style="list-style-type: none">▶COBRA Benefits Continuation 800-242-8893, ext. 2959
Unemployment Claims and questions are handled by Insperity. Please fax or direct all inquiries to Insperity's Unemployment team immediately upon request.	COMPANY>REGULATORY AND COMPLIANCE <ul style="list-style-type: none">▶Government Reporting▶Respond to Unemployment Compensation Claim 800-242-8893, ext. 4203 800-878-2582 (fax) unemployment@insperity.com



For the latest information,
visit Insperty Premier™ at
portal.insperty.com

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HR and Business Performance Solutions: Workforce Optimization® Services | Human Capital Solutions
Payroll Services | Time and Attendance | Performance Management | Organizational Planning | Recruiting Services
Employment Screening | Financial Solutions | Expense Management | Retirement Services | Insurance Services

[insperity.com](https://www.insperity.com) | 800-242-8893