Activate New Employee Profile Created via Self-Registration

Description: In this topic, the user will learn the steps required after an employee has self-registered. These steps ensure that the employee will be able to locate their clients and enter time into the system. A self-registered employee will remain in a Pending status until their account is updated to Active. This is also an opportunity to review the employee details and make updates as needed.

*Please note: This process is applicable for organizations that have the self-registration feature enabled. Reach out to DCI if the organization is interested in enabling this feature.

Role Required: Super User, Supervisor

Permission Required: Employee Admin

Edit Employee Profile

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Employees** from the submenu
4. Enter the employee name into the search filter and click **Search**
5. **Click anywhere on the employee row** to open the employee details page
6. Click **Actions**
7. Select **Edit Employee** from the drop-down menu
8. Review all information on the **Basic Demographics** tab. If any changes are made, click **Save** and **Yes** to confirm.
9. Click the **Employee Information** tab
    a. Enter the **Employee Number**
    b. Enter the amount of **Weekly Hours Available**
    c. Ensure the employee has the correct **Cost Center**
    d. Enter the **Hire Date**
    e. Make any other necessary changes, for example, add a certification template or holiday schedule or update the preferred language if known, then click **Save** and **Yes** to confirm.
10. Click the **Authentication Information** tab
    a. Change Authentication Status to **Active**, then click **Save** and **Yes** to confirm.
11. Notify the employee and the supervisor that the profile is now active

*Please note: The employee can only make training punches until additional employee service accounts are created. An employee service account connects the client to the employee for a particular service.

Create a new Employee Service Account

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name into the search filter and click **Search**
5. **Click anywhere on the employee row** to open the employee details page
6. Click **Actions**
7. Select **New Service Account** from the drop-down menu
8. Complete the **Add New Service Account form wizard**
9. Click **Save** and **Yes** to confirm

The employee can now create time entries for the service provided. Repeat this process for any additional services that the employee is authorized to provide.

Related articles

- Group Service - Supervisor Guide
- Reports Guide
- Authorizations - Overview
- System Set-Up - Admin Guide
- Manage Holidays