

Employee Profile - Create, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create, view, edit, or deactivate employee profiles including basic demographics, employee information, and authentication information. Employee profiles cannot be deleted, but the status can be changed to inactive in the employee profile.

Role Required: Super User

Permission Required: Employee Admin

Required Entities Before Creation:

- Cost Center

Create Employee Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Click **Actions**
5. Select **Add New Employee**. Complete the form wizard.
 - a. Basic Demographics tab:
 - i. First Name **(required)**
 - ii. Last Name **(required)**
 - iii. Full Name **(required)**
 - iv. Address **(required)** – After entering, the click blue **search location** hyperlink to populate GNIS Code.
 - v. Time Zone: Select from drop-down
 - vi. Phone **(required)**
 - vii. *Alternate Phone (optional)
 - viii. Mobile Number (optional)
 - ix. Email **(required)**
 - x. DOB (optional)
 - xi. **Profile Reference (optional)
 - xii. **Training System Reference (optional)
 - xiii. Employee Type **(required)**: Dictates how the employee's hours are processed for payroll, including whether they are eligible for overtime.
 - xiv. *SSN **(required)**
 - xv. *Verify SSN **(required)**
 - xvi. Allow SSN Retrieval: Yes or no options, default is no. If yes is selected, the SSN will be stored in a retrievable format for EVV aggregation. Only select yes if the funding source requires SSN to be aggregated.
 - xvii. Gender (optional): Select from drop-down
 - xviii. Employee Mailing Address (optional): If using, exclude commas and special characters.
 - xix. Attach Photo (optional): Required if facial recognition will be used for EVV.
6. Click **Next**
 - a. Employee Information tab:
 - i. Domestic Worker (optional): Only select yes if an employee is classified as a domestic worker (not applicable to all states)
 - ii. Domestic Worker 7 Day Exception: This field unlocks if domestic worker is set to yes. Only select yes if the domestic worker agrees to a 7-day work week.
 - iii. Domestic Worker Preferred Day of Rest: Unlocks if yes is selected for domestic worker 7 Day exemption is selected. Certain states pay overtime if the domestic worker works on their day of rest.
 - iv. Employee Number **(required)**: Number provided by the organization at the time of hire
 - v. Weekly Hours Available **(required)**: Maximum number of hours the employee is available to work each week. Links to the scheduling module.
 - vi. **Professional Id1 (optional)
 - vii. **Professional Id2 (optional)
 - viii. **Payroll Id (optional)
 - ix. Certification Template (optional): Select if there are a set of certification requirements specific to this employee
 - x. Holiday Schedule **(required)**: Dictates which days this employee is eligible for holiday pay
 - xi. Cost Center **(required)**: The employee's home cost center
 - xii. *Hire Date (optional): The date the employee was hired
 - xiii. Preferred Language: Default is English
7. Click **Next**
 - a. EVV Location tab (not used for employees – specific to the client, where they are receiving service):
 - i. Copy from Profile Address (optional): Copies the address from the basic demographics tab
 - ii. EVV Location Name **(required if completing)**: The name of the location, i.e., home.
 - iii. EVV Location Type **(required if completing)**: Select from drop-down
 - iv. Address **(required if completing)**: The location address. Auto-populates if Copy from Profile Address box was checked.
 - v. Country **(required if completing)**
 - vi. Phone Number (optional): Required for Phone EVV
 - vii. Phone Verified **(required)**: Select yes or no, has the phone number been verified for Phone EVV?
 - viii. Phone Type (optional)
 - ix. Phone Carrier (optional)
 - x. Begin Date **(required if completing)**: The first date the location is approved for use
 - xi. End Date (optional): The last date the location is approved, if applicable.
 - xii. Status **(required if completing)**: Select from drop-down
 - xiii. Primary (optional): Select if this is the primary EVV location
8. Click **Next**

- a. Authentication Information tab:
 - i. Username (optional to change): Will be used for all future logins by this employee
 - ii. Password (**required**): Will be used for all future logins by this employee. Hover over the white "i" (information) for password requirements.
 - iii. Confirm Password (**required**): Enter the same password as above to confirm
 - iv. Pin (**required**): Can be used instead of a password when logging in via a mobile device
 - v. Employment Status (**required**): The employee's status with the organization
 - vi. Authentication Status (**required**): The status of the employee profile. Defaults to active. Select disabled if the employee is no longer with the organization. Select locked to temporarily prevent the employee from logging in.
 - vii. Permissions (optional): Select all tasks the employee can perform for the entire system
 1. See the Permissions Guide to learn more
9. Click **Next**
10. Review Employee Information, click **Save** to continue, and **Yes** to confirm.

View, Edit, or Deactivate Employee Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the filter and click **Search**
5. **Click anywhere in the employee row** to open the Employee Details page
6. Click **Actions**
7. Select **Edit Employee** from the drop-down menu
8. View, make edits, and review employee details on the following tabs:
 - a. Basic Demographics
 - i. To deactivate the employee profile, change the status to **Inactive**.
 - b. Employee Information
 - c. Authentication Information
9. Click **Save** and **Yes** to confirm

Related articles

- [Import Formats - Admin Guide](#)
- [Reports Guide](#)
- [System Set-Up - Admin Guide](#)
- [Billing Module - Admin Guide](#)
- [Payroll Module - Admin Guide](#)