

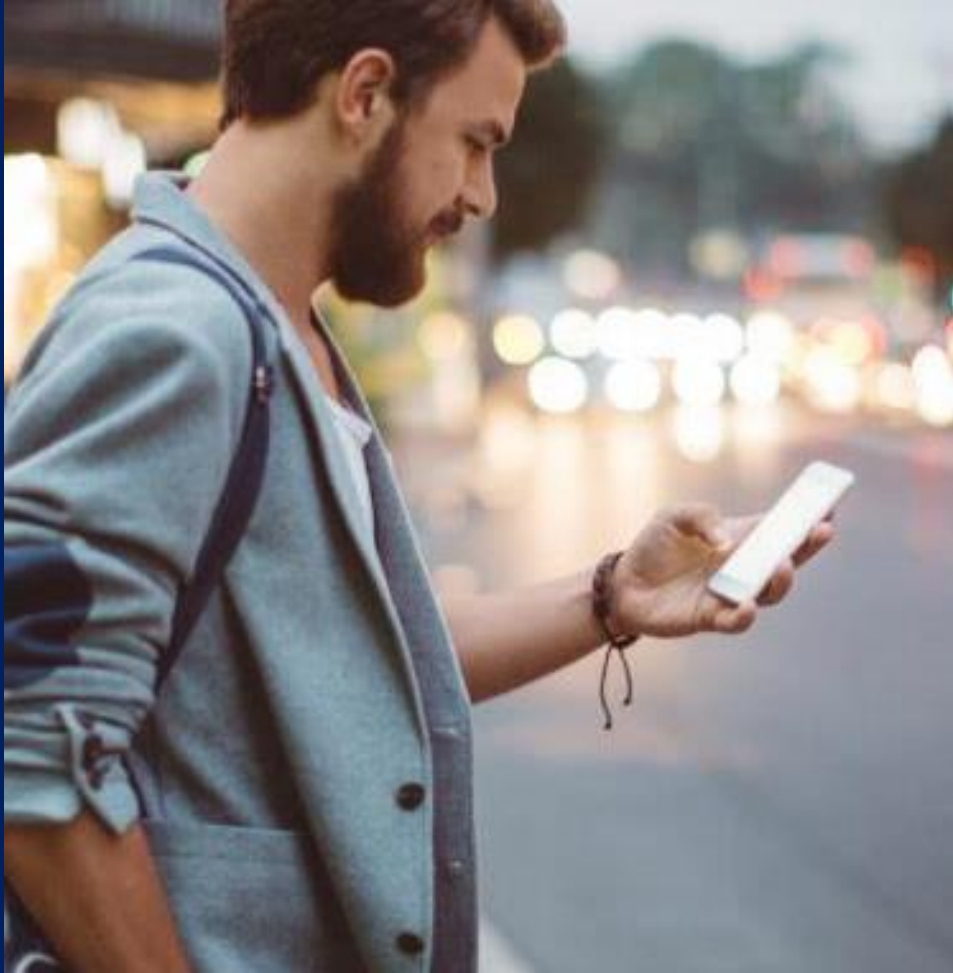


EXCEL EMPLOYEE LEAVE TRACKER

A customizable semi-automated spreadsheet for your company's Leave Programs



AGENDA



- **What types of organizations would benefit from Excel Employee Leave Tracker?**
- **What is Excel Employee Leave Tracker and how it will work for you?**
- **Why use Excel Employee Leave Tracker?**
- **How Excel Employee Leave Tracker began?**
- **Research and Discovery (Requirements needed)**
- **Demonstration of Employee Tracker**
- **F.A.Q's**
- **Excel Employee Leave Tracker Benefits Summary**
- **Optional Dashboard featuring Charts / Graphics**
- **Final Thoughts...**





WHAT ORGANIZATION WOULD BENEFIT FROM EXCEL EMPLOYEE LEAVE TRACKER?

- HR Departments
- Hospitals
- Municipalities
- Entertainment
- Manufacturing
- Small Business
- Educational
- Health & Beauty
- Consultants
- Publication
- Financial
- Restaurants



WHY USE EXCEL EMPLOYEE LEAVE TRACKER?

So... what is the “Real Deal”?

Your time is too valuable to design a workable tool yourself that will provide the required information you need. You don't need a long learning curve for your current or new team members to master and do their jobs. Employee Tracker uses the information that is currently stored in your HRIS system for quick rapid information without the hassle of switching screens and timeout between platforms.

Plus, Excel Employee Leave Tracker's low cost as compared to TPA and Cloud / Online Portals, it makes economical sense as well.



Data is used that is already updated within your company's HRIS. No need to research employee's data (i.e. hire date / length of service), information is instantaneously provided once EE's identifiable information is inputted



Employee Tracker has built-in reminder “pop-ups” that will inform your team if employee is due to return, has not returned to work per expected return date, or is close to 1-year anniversary. These reminders are designed to ensure proper administration



Employee Tracker provides up-to-date State Family Paid and Unpaid Leave that is applicable to your employee population / work state. This include NY, NJ, CT, CA, HI, D.C, WA, MN, MI, RI, PA, VT, OR



Future updates from Employee Track featuring a pre-designed email template thru Outlook with a push “pop-up” button to employees on leave. Stay Tuned!!



RESEARCH & DISCOVERY



No additional training other than Basic Excel knowledge... honest!

There is no need to know VBA coding, macro designing, or formulas. Once your team start to use the template, you'll wonder why this was not created earlier.

All coding will be done by Excel Employee Leave Tracker. With instant data retrieval using Vlookup and other VBA coding, all relevant data fields will be completed for review and temporal reminders given to your team for future pending tasks.

Requirements

- Excel 2009 or higher
- HRIS system that can export an Excel or CSV files
- Unique Identifiers (i.e. Employee ID / Badge #)
- Copy of company's leave program – If leave policy is not available –we can assist with designing one!
- Types of data Leave Log should capture
- Type of summary reports (pivot tables) your team would like

	G	H	I	J	K	L	M	N	O	P
	7	8	9	10	11	12	13	14	15	16
	Home Address 2	City	State	Zip	Hire Date	Re-Hire Date	Cell Phone	Home Email	Home Phone	Supervisor Name
3	Apt 3	Brooklyn	NY	11211	3/28/2016		(417) 598-5933	Ckent@ThePlant.com	(618) 166-7548	Perry White
4	12H	New York	NY	10035	8/7/2017		(327) 176-2704	Dianna_Princess@WonderWoman.Com	(594) 550-6077	
5	3C	Brooklyn	NY	11205	8/14/2012		(981) 045-2287	NatashaRomanoff@SuperAssassin.com	(601) 680-2508	Nick Furry
6	Apt 14	New York	NY	10128	8/24/2015		(369) 370-9951	Peter.Paker@DaliyBugle.com	(155) 754-9526	J.Johnan Jameson
7	11	New York	NY	10002	8/1/2017		(526) 702-6207	Puff_Daddy@BadBoys.Com	(320) 322-2227	
8	2	Brooklyn	NY	11213	7/6/2015		(617) 407-6182	Divia1@SongBird.com	(46) 106-3291	
9	#2F	Brooklyn	NY	11216	2/1/2016		(102) 571-1002	Carol.Denvers@CaptainMarvel.com	(621) 204-4124	
10	1811	Jersey City	NJ	07310	8/7/2017		(282) 798-9139	SuperStar@Diva.com	(357) 025-5413	
11	2L	Brooklyn	NY	11211	3/31/2014		(666) 099-9797	MoiveStar@Ballons.com	(859) 072-4377	
12	1	Brooklyn	NY	11226	12/18/2017		(45) 047-9753	Hulk_Smash@Marvel.com	(396) 389-9699	
13		Coplaque	NY	11726	6/6/2016		(575) 446-7643	mlej556@Ballons.com	(887) 575-4844	
14	Apt 23	New York	NY	10031	8/14/2017		(256) 175-2541	nmm414@nyu.Gumdrops	(507) 804-4233	
15		Port chester	NY	10573	8/28/2012		(580) 466-9899	leah.finigan@Birthday Cake.com	(535) 759-5083	
16	Ground Floor	BROOKLYN	NY	11233	6/9/2014		(749) 745-1266	bsadler@invictusprep.org	(239) 773-5605	
17		Brooklyn	NY	11234	8/17/2016		(878) 312-3388	michellec33@Birthday Cake.com	(737) 161-5364	
18	FL 2	Stamford	CT	06902	8/7/2017		(474) 193-3694	wgriffin@greatoakscharter.org	(317) 981-6595	
19		Medford	MA	02155	8/21/2017		(122) 996-9558	callaghan.kate@Ballons.com	(281) 414-3215	
20	Penthouse 1A	New York	NY	11201	8/11/2014	8/16/2016	(291) 723-6291	I_Am_IronMan@Avengers.Com	(159) 599-5043	Peter Dinkoffs
21	6C	New York	NY	10028	8/14/2017		(412) 755-4430	kathleenmariemccann@Birthday Cake.com	(691) 335-6326	
22	Apt 2F	New York	NY	10033	8/1/2005		(957) 598-2579	breerichter@Birthday Cake.com	(424) 000-0056	
23		New York	NY	10011	7/14/2014		(353) 406-9260	alexandra.apfel@brillacollegeprep.org	(986) 33-1500	
24	Apt 2C	New York	NY	10021	8/31/2016		(250) 081-7777	julie.fishman12@Ballons.com	(312) 33-8900	
25	Apt. 2101	New York	NY	10128	7/29/2016		(206) 206-7040	jennashouldice@Ballons.com	(408) 000-0000	
26	7D	Bronx	NY	10451	8/1/2017		(607) 295-3657	Rbatista1027@Ballons.com	(397) 000-0000	
27	1A	New York	NY	10026	8/29/2016		(427) 743-4252	a.battalen@Ballons.com	(211) 171-4400	
28		Salisbury	MA	01952	8/4/2014		(486) 695-2315	cara.m.rossi@Ballons.com	(404) 448-6501	Sherrill Smith
29		Brooklyn	NY	11221	8/29/2016		(657) 203-5030	saunsia.lewis@Ballons.com	(233) 000-0000	
30	C21	Rye	NY	10580	8/14/2017		(560) 867-3796	rrountree@ncsharlem.org	(530) 579-5782	



DEMONSTRATION

A quick video of how fast Excel Employee Leave Tracker works



AutoSave Off Presentation Leave Log v02112020v2 - Last Modified: 2h ago Search Warren Anderson WA

File Home Insert Page Layout Formulas Data Review View Developer Help Power Pivot Share Comments

A15

	A	B	C	D	E	F	G	H	I	J	K
	Input Date (Date Notified)	Reminder Status	Employee Full Name	Social Security Number	Employee's ID	Date of Hire	Rehire Date	Length of Service	Annual Salary	Eligible for Federal FMLA? (based on hire date)	State of Employee
13											
14	1/5/2020	OFF	CLARK KENT	111-11-1111	N8094-105800	3/28/2016		3 Years 10 Months ,15 Days	\$55,764.80	Yes	NY
15		ON									
16		OFF									
17		OFF									
18		ON									
19		OFF									
20		OFF									
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37		OFF									
38		OFF									

2020 New York State Calculator BenefitElectionsEEOnly_1969 Leave Log Sheet1 Master Sheet

Press the play button above

*If downloaded pdf...please click icon



For a full demonstration – schedule an appointment Info@ExcelEmployeeLeaveTracker@Com



F.A.Q'S



Who would benefit using Excel Employee Leave Tracker?

- Companies with large / active leave populations
- Companies with 100 or more employees
- Companies with employees in multiple states
- For profit / non-profit organizations
- HR teams who want a reliable tool that will provide reminders and give accurate results

- *How long will it take to create a template?*

Depending on the fields requested to build, the different types of leave programs, population, and the ability to create an indicative file with relevant fields, the delivery date may take as little as two weeks.

- *Can my leave team change or delete fields after the template is delivered to my team?*

No. The file is password protected and locked. Only those columns and cells that your team would need to input data (i.e. employee's names, employee's ID #). This is to prevent undo errors and deletion of formulas. We will be able to add / delete columns to your template if so desire.

- *How often should the data from my HRIS system needs to be updated to Excel Employee Leave Tracker?*

The suggested recommendation is semi-monthly. This is to keep the source data current and record any changes in status that your HRIS data may record.

- *What if my team is unable to reproduce the source data from our HRIS system into one report?*

If needed, Employee Leave Tracker will work with your team to run multiple reports to create the master list using Power Queries & Connection in Excel. Or, we can create the report from your HRIS for you to copy and paste the into the template using a secure data transfer application for a small monthly fee.

- *What if there are changes to Local and Federal Paid / Unpaid leave polices?*

Excel Employee Leave Tracker will update your file within the 1st year the of new regulations. If your company is revising the leave policies within the first year, we will update the template to your company's new leave polices at no cost. All other updates will incur a small service charge after discovery.

- *Can my Leave Team request additional data items to my existing Leave Log?*

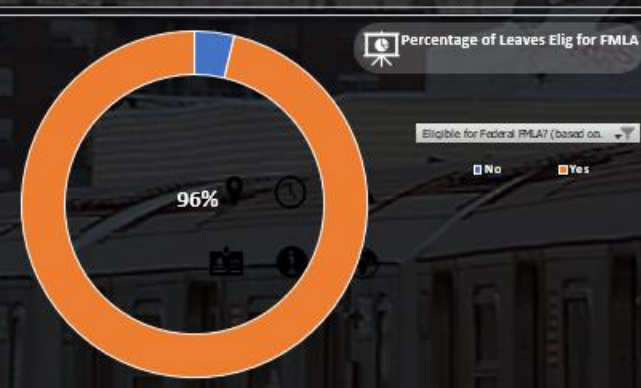
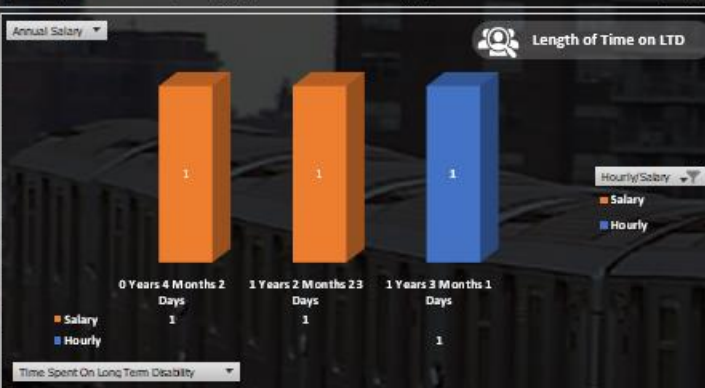
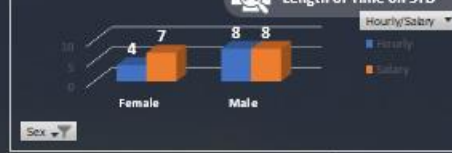
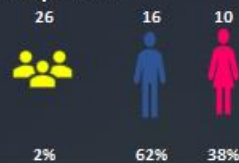
Of course...just contact Employee Tracker to request additional data points your team requires and we will do our best to provide what you need in a short turn-around time.



Excel Employee Leave Tracker Benefits Summary...

- Automatically calculate actual leave days taken *and any unused (not holidays and weekends) days*
- Will provide employee's Last Day Work spontaneously *(based on employee's handbook & leave policies)*
- Pop Up Reminders – inform your team to contact employees due return to work on STD & approaching One Year Limit on LTD
- Use data from company's HRIS system to ensure accurate employee data
- Automatically provides eligibility for FMLA
- Smart *Drop-Down* menus based on employment state to determine State Paid Family Leave
- Ability to customize report to meet present & future needs
- Affordability
- Ease of use – No need-to-know advance VBA programming ..only basic Excel knowledge required
- Versatility - Report is sharable for team members to work remotely with all the advantages of Microsoft Excel and Office
- HR Dashboard for high level analytical reports
- Instantaneously apply waiting period before leave date begins at point of input





CUSTOMIZABLE DASHBOARD OPTION

Optional Dashboard available to provide management high level viewpoints





Final thoughts...

- **Easy to use by all team members**
- **Customizable to fit your organization's needs**
- **Ability to share report remotely for input and management analysis**
- **Affordability**
- **Optional dashboard created on a monthly / quarterly basis**





To schedule a demonstration:
Info@ExcelEmployeeLeaveTracker.Com or
646-527-8450 for more information

Thank You! 