



Lawson Healthcare Webinar Series

October 20-24, 2008

HR Processes Enabled by Self-Service Functions:
The ACTS Retirement Life Communities Story

Presenters: Claire Halton and Rick Winter

Webinar Series October 20 – October 24

▶ **Monday, October 20**

[Road to Budgeting & Planning 9.0](#)

10 am CST

▶ **Tuesday, October 21**

[Getting Everyone in the ACT Through Self Service HR](#)

10 am CST

▶ **Wednesday, October 22**

[Taking Inventory of Mobile Supply Chain Management](#)

10 am CST

Thursday, October 23

[Banner Savings With Employee and Manager Self Service](#)

10 am CST

[Increase Your IQ on Lawson Business Intelligence](#)

1 pm CST

Friday, October 24

[Getting on Solid Ground with Joint Commission Compliance](#)

10 am CST

To sign-up or watch the replay visit:

<http://www.lawson.com/hcwebinarseries>

Claire Halton

Claire Halton is the Corporate Director of Employee Relations and Benefits for ACTS Retirement-Life Communities, Inc. In her role, she provides organizational guidance and support in several areas of Human Resources including, employee relations, benefits, employment and policy development and implementation. Claire has a Bachelor's Degree in Human Resources from Temple University, and a Master's Degree in Organization and Management with a specialty in human resources from Capella University.

Claire obtained her Senior Professional in Human Resources (SPHR) certification in 1999. Claire is a founding member and past President of ACTS Toastmaster's Club "ACTSually Speaking, and is active in the Society for Human Resources Management, PANPHA and AAHSA.

Richard Winter

Richard Winter is the Corporate Director of Shared Services and Business Systems for ACTS Retirement-Life Communities, Inc. where he has worked for over 5 years. Rick's unique knowledge of the organization's financial systems, his commitment to process improvement and his focus on measuring and enhancing user and customer satisfaction enables him to provide valuable input and leadership in the achievement of ACTS ongoing core business services initiatives and objectives and to focus on enhancing the effective and efficient delivery of shared services, through the implementation of best practices and the utilization of new technologies.

Rick is a Certified Public Accountant and has a BA degree in Philosophy from Wheaton College, an MBA in Accounting/Finance from Temple University.

Agenda

- **Introduction to ACTS**
- **The Processes - Open Enrollment/ Manager Self- Service/ Employee Self-Service**

Objective

Before

After

Agenda

- **Challenges**
- **Future Initiatives**
- **Questions**

Introduction to ACTS...

- **Established in 1972 - Non-profit builder, owner and manager of continuing care retirement communities**
- **19 communities w/ 3 corporate offices**
- **16 skilled nursing facilities – “WillowBrooke Court”**
- **16 assisted living facilities – “OakBridge Terrace”**

Introduction to ACTS

- **Provider of home health services**
- **Serving 6,000,000 meals per year**
- **Approx. 7,500 residents**
- **More than 5,500 employees**

Employee Demographics

- ★ **Employees from 42 different countries**
- ★ **Age range**
- ★ **Computer literacy**

Open Enrollment

Objective:

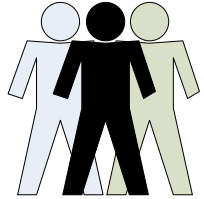
To enable employees to enroll in benefits on line and to eliminate the manual effort required to support the recording and reporting of employee benefit data.

Before Lawson.....

- ✓ **Paper enrollment Forms**
- ✓ **Deductions keyed manually**
- ✓ **Paper enrollments mailed to carrier**

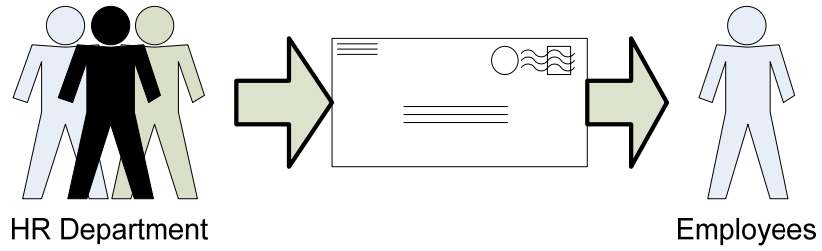


Before:

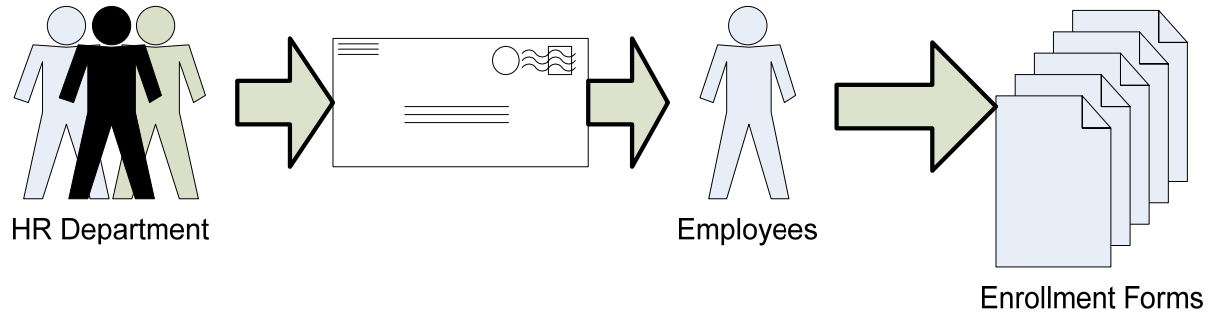


HR Department

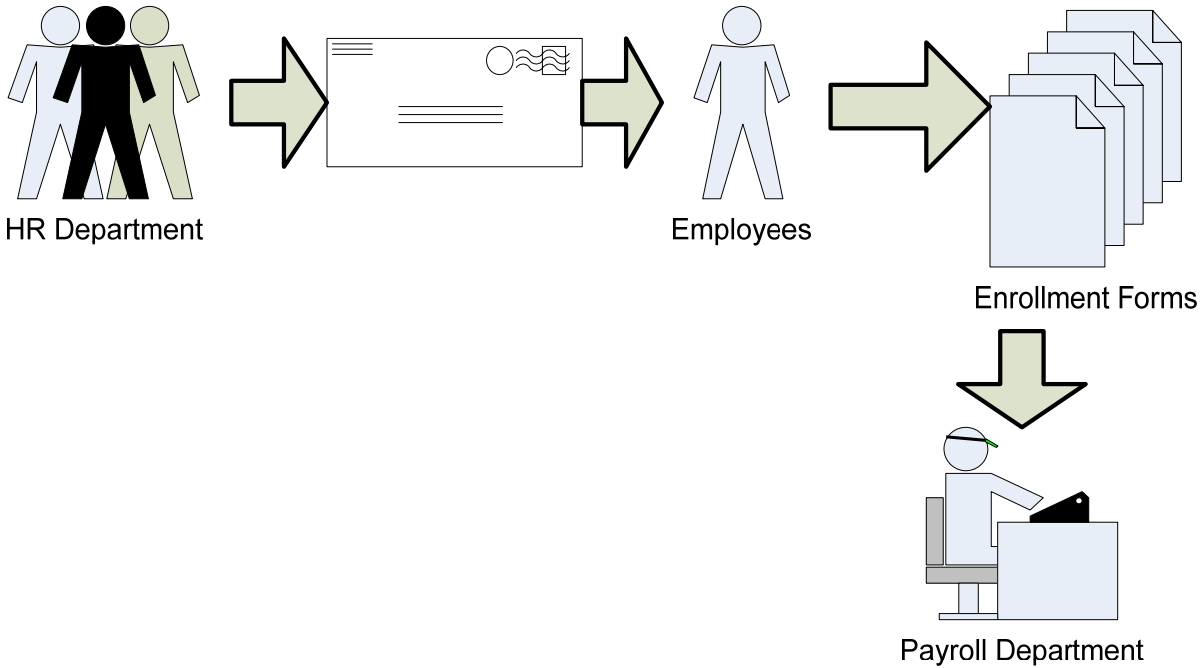
Before:



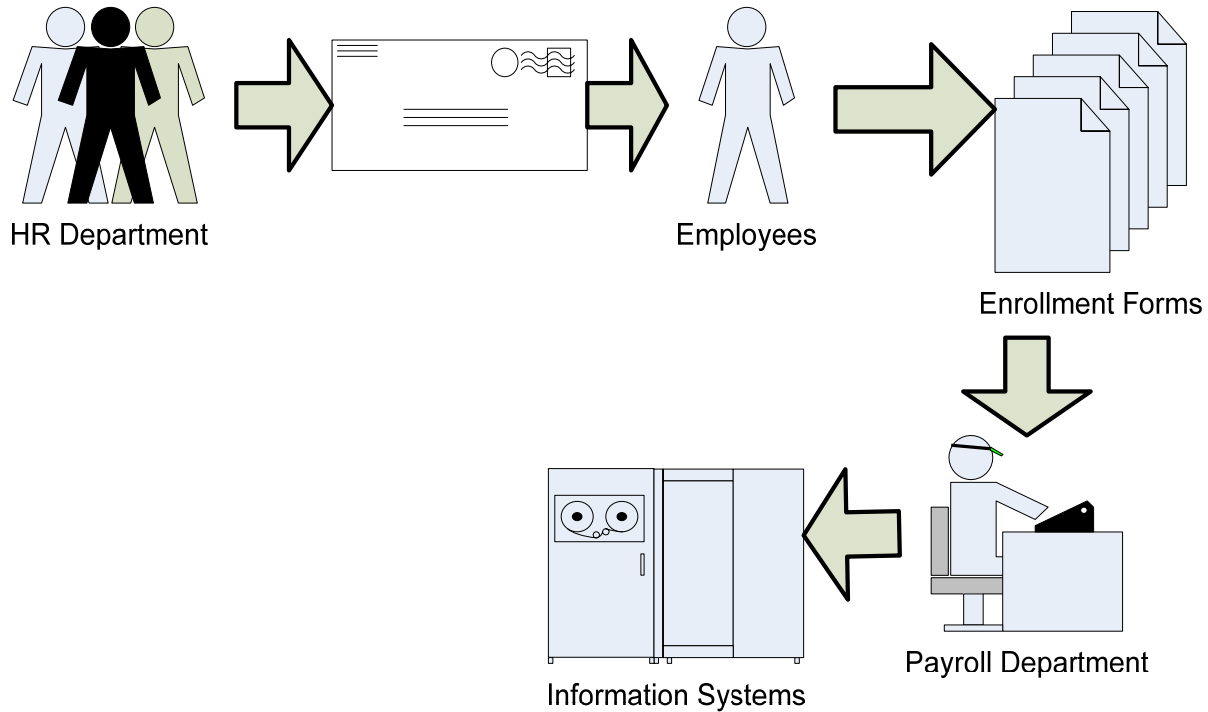
Before:



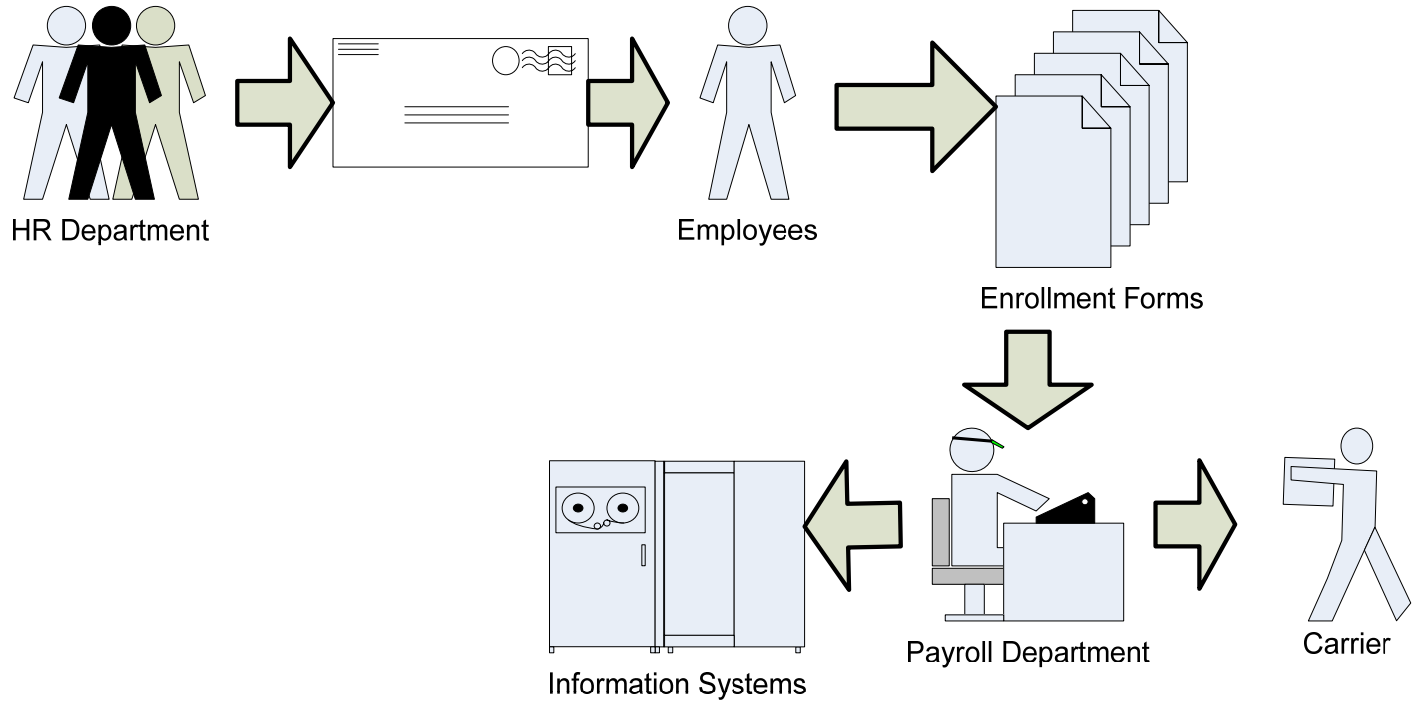
Before:



Before:



Before:



After Lawson

- ✓ ***On-line enrollment via the ACTS portal***
- ✓ ***Deductions automatically updated***
- ✓ ***Benefit enrollments electronically transmitted to carriers***

TS1-use at home - Citrix ICA Client
http://lawsontest.actslife.org:81/lawson/bnnet/benannenroll.htm - Microsoft Internet Explorer

HEALTH PLANS

You are currently enrolled in National PPO Plan

As Of	Coverage Type	Your Cost
12/01/2004	Family	134.55 Pre-Tax
12/01/2005	Family	134.55 Pre-Tax

Costs are per Pay Period

Covered Dependents As Of 12/01/2004

Laura Howard Emily Howard
Carol Howard

Do you want to:

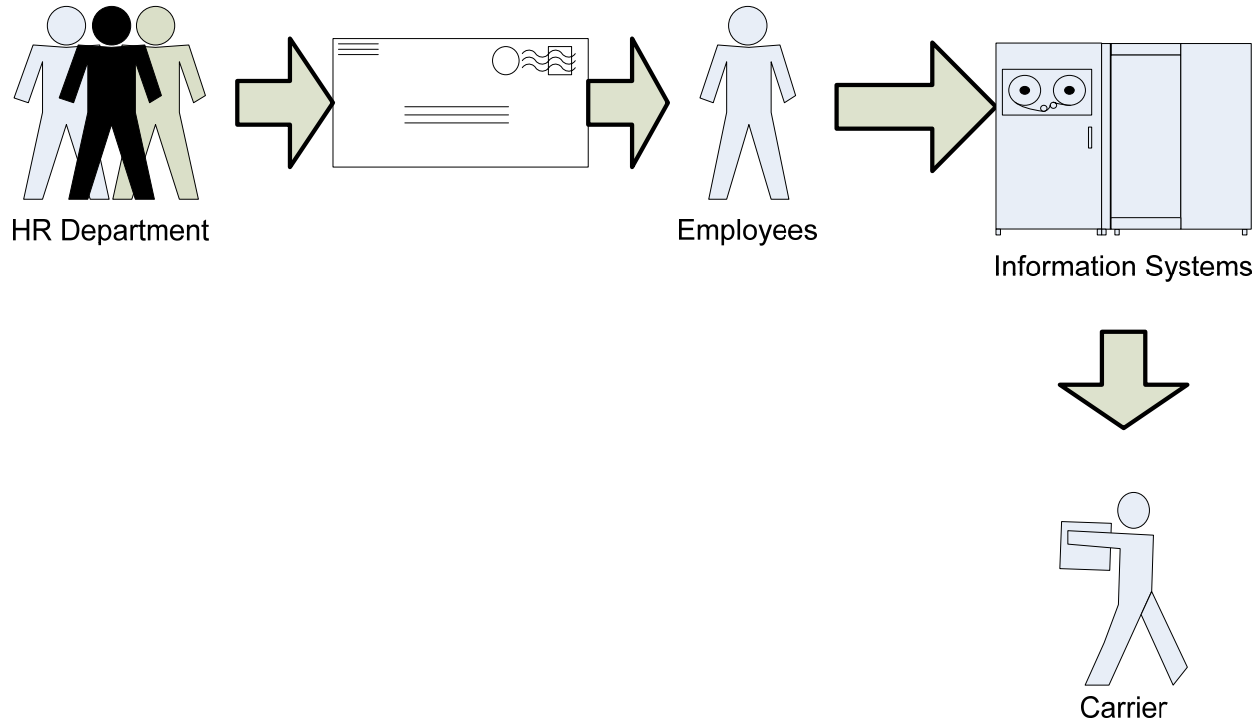
- [keep the same coverage.](#)
- [change this coverage.](#)
- [change dependents covered.](#)
- [select a different plan or end plan.](#)

quit

Quit benefits enrollment

Start | My Portal - Microsoft Inte... | My Information - Microsof... | http://lawsontest.act...
Start | Novell GroupWise - ... | Citrix Program Neigh... | TS1-use at home - ...

After:





- Home - Administrative Tools - Communities/Locations - Departments - Documents Logout

- Personal**
 - My Information
 - Professional Developm
 - Employee Guide Book
 - Department
 - Password Registration
 - Knowledge Pathways
- Job Tools**
 - Groupwise
 - Manager's HR Tools
 - eReports Administration
 - Dashboard
 - Capital Project Approval
 - Crystal Reports 10

Bulletin Board

Open Enrollment for Employee Benefit Plans begins Monday, October 1, 2007 and continues through Wednesday, October 31, 2007.

Please remember, every benefit-eligible employee must re-enroll, even if you wish to elect the same coverage as last year, or waive coverage entirely

[Click here to enroll.](#)

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31,
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[ctions.](#)

- Resources**
 - Service Center
 - ACTS Mission Statement
 - Employee Directory
 - Job Site
 - Marketing Site
 - Portal Suggestions
- Of Interest**
 - ACTS Newsletters
 - News
 - Weather
 - Corporate Picnic Photos

Alerts


Back



Welcome
GEORGE SMITH

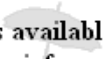
Welcome to ACTS' On-Line Open Enrollment session through Lawson Self Service! This new enrollment process puts you in control of your benefit selections for the new plan year.

We hope you have had a chance to attend an Open Enrollment Presentation at your community or job site. You will have the opportunity to see your current benefits as you are guided through this on-line enrollment process.



The elections you make will be effective December 1, 2005 through November 30, 2006. After December 1, 2005 you will only be able to make changes to your benefits if you encounter a significant Life Event Change (i.e., Marriage, Divorce, Birth of Child, Spouse/Self Change in Job Status).

If for any reason you do not complete the enrollment process in it's entirety, you will be prompted to print the information you have already entered for future reference. **Unless the entire enrollment process is completed, your elections are not saved.**



Remember to visit the other Employee Information sites available via Employee Self Service within the ACTS Portal. You can view and make changes to your employee information!

Thank you!

continue

quit

You may enroll in these HEALTH PLANS plan(s).

Choose the plan you want to enroll in:

- | Plan | |
|--|------------------|
| <input type="radio"/> Basic National PPO Plan | Plan Description |
| <input type="radio"/> Keystone 515 HMO - PA Only | Plan Description |
| <input type="radio"/> Keystone POS - PA Only | Plan Description |
| <input type="radio"/> National PPO Plan | Plan Description |
| <input type="radio"/> No Health Election | Plan Description |

[continue](#) [quit](#)
[show elections](#)

HEALTH PLANS

You have selected Basic National PPO Plan

Plan Description

Choose 1	Coverage	Your Cost
<input type="radio"/>	Single	5.22
<input type="radio"/>	Couple	11.90
<input type="radio"/>	Parent/Children	20.09
<input type="radio"/>	Family	39.28

Your contribution will be pre-tax

Costs are per Pay Period

[continue](#) [previous](#) [quit](#)

HEALTH PLANS

You have selected Basic National PPO Plan

Plan Description

This plan may cover a spouse and your dependents.

Select the dependents you want covered by this plan:

Dependent	Covered
John Smith	<input type="checkbox"/>
Mary Smith	<input type="checkbox"/>
Judy Smith	<input type="checkbox"/>



[continue](#) [previous](#)

HEALTH PLANS

You have selected Basic National PPO Plan

Plan	Coverage	Your Cost
Basic National PPO Plan	Family	39.28 Pre-Tax

Costs are per Pay Period

Covered Dependents As Of 12/01/2005

John Smith

Changes will be effective 12/01/2005
Is this correct?

Yes No

[show elections](#)

http://lawsontest.actslife.org:47080/lawson/bnnet/benannenroll.htm - Microsoft Internet Explorer

HEALTH PLANS

You have selected Keystone 515 HMO - PA Only


Plan	Coverage	Your Cost
Keystone 515 HMO - PA Only	Family	71.65 Pre-Tax

Costs are per Pay Period

Covered Dependents As Of 12/01/2005

John Smith Mary Smith

Microsoft Internet Explorer



You selected a plan that requires a primary physician.
Please select a physician from the following list...

OK

show elections

javascript:checkBenPlan() Internet

Start | My Portal - Microsoft... | Open Enrollment | My Information - Mic... | http://lawsontes... 2:32 PM

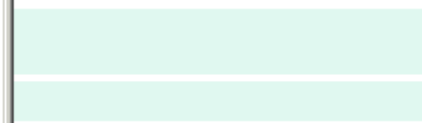
http://lawsontest.actslife.org:47080 - Care Provider Selection - Mic... Internet Explorer

Please select a care provider for **JOHN SMITH:**
(Currently selected care provider is **JAMES SMITH** at .)

Search by last name:
and/or Facility Name:

Use filter bar above to search for your care provider.
Partial names and cities are acceptable.

Done Internet



ge Your Cost
nily 71.65 Pre-Tax

Period
Of 12/01/2005

Smith



12/01/2005

?



s

http://lawsontest.actslife.org:47080 - Care Provider Selection - Mic... - Microsoft Internet Explorer

Please select a care provider for **JOHN SMITH**:
 (Currently selected care provider is **JAMES SMITH** at .)

Search by last name:
 and/or Facility Name:

Last Name	First, MI	Facility Name
JONES	MARCE	
JONES	JANIS	
JONES	PATRI	
JONES	LAURA	
JONES	DOUGL	
JONES	ERIC	
Jones DO	David R	PRIMARY CARE ASSOCIATES
Jones DO	Jeffrey J	TOPTON FAMILY PRACTICE ASSOCIA
Jones Iii MD	Horatio C	STONEY BATTER FAMILY MEDICINE
Jones Levette MD	Aribelle	PENNCARE-INTERNAL MED AT MAYFA
Jones MD	Maria L	JAMES J FREEMAN DO PC
Jones MD	Graham P	GRAHAM P JONES MD
Jones MD	Debra Y	DEBRA Y JONES MD
Jones MD	Noble S	HEALTH ASSOCS OF S PHILADELPHI
Jones MD	Daniel A	DANIEL A JONES MD
Jones MD	Howard D	DELAWARE VALLEY FAMILY HEALTH
Jones MD	Vaughnette M	PEDIATRIC AND ADOLESCENT MEDIC
Jones Roscioli MD	Catherine	MEDFORD PEDIATRICS ADOLESCENT

Click column headings to sort...

Done Internet

ge Your Cost
 nily 71.65 Pre-Tax

Period
 Of 12/01/2005

Smith



12/01/2005



http://lawsontest.actslife.org:47080 - Care Provider Selection - Mic... - Microsoft Internet Explorer

Please select a care provider for **JOHN SMITH**:
(Currently selected care provider is **JAMES SMITH** at .)

Search by last name:


and/or Facility Name:

Last Name	First, MI	Facility Name
JONES	MARCE	
JONES	JANIS	
JONES	PATRI	
JONES	LAURA	
JONES	DOUGL	
JONES	ERIC	
Jones DO	David R	PRIMARY CARE ASSOCIATES
Jones DO	Jeffrey J	TOPTON FAMILY PRACTICE ASSOCIA
Jones Iii MD	Horatio C	STONEY BATTER FAMILY MEDICINE
Jones Levette MD	Aribelle	PENNCAR... INTERNAL MED... AT UNIV...
Jones MD	Maria L	JAMES ...
Jones MD	Graham P	GRAHAM ...
Jones MD	Debra Y	DEBRA ...
Jones MD	Noble S	HEALTH ...
Jones MD	Daniel A	DANIEL ...
Jones MD	Howard D	DELAWA ...
Jones MD	Vaughnette M	PEDIAT ...
Jones Roscioli MD	Catherine	MEDFOR ...

Click column headings to sort...

Done

Microsoft Internet Explorer

 You selected David Jones DO at PRIMARY CARE ASSOCIATES..

Thank you.

ge Your Cost
nily 71.65 Pre-Tax
Period
Of 12/01/2005
Smith

These will be your new benefits as of December 1, 2005.

Plan	Coverage	Your Cost
Keystone 515 HMO - PA Only <i>John Smith</i> <i>Mary Smith</i> <i>Judy Smith</i>	Family	71.65 Pre-Tax
VSP Vision Plan <i>John Smith</i> <i>Mary Smith</i> <i>Judy Smith</i>	Family	7.24 Pre-Tax
Cigna PPO Dental Plan <i>John Smith</i> <i>Mary Smith</i> <i>Judy Smith</i>	Family	29.90 Pre-Tax
Voluntary Life	10,000.00	5.61 After-Tax
Dependent Life Children Plan <i>John Smith</i> <i>Mary Smith</i>	6000.00	0.66 After-Tax
Dependent Life Spouse <i>Judy Smith</i>	20,000.00	1.88 After-Tax
No Spending Account Election		


Pay Period Cost Summary:	
Total pre-tax contributions	108.79
Total after-tax contributions	8.15

Do you want to:
[. Make changes?](#)

Change your elections




Start | Novell GroupWise - ... | My Portal - Microsoft... | My Information - Mic... | http://lawsontes... <<

http://lawsontest.actslife.org:47080/lawson/bnnet/benannenroll.htm - Microsoft Internet Explorer




Congratulations GEORGE SMITH

Your enrollment has been successful. Please wait for the print box. Once printing is complete, choose **Continue** to exit.



continue



Change your elections | Internet

Start | Novell GroupWise - ... | My Portal - Microsoft... | My Information - Mic... | http://lawsontes... | 8:41 AM


Manager Self-Service

Objective:

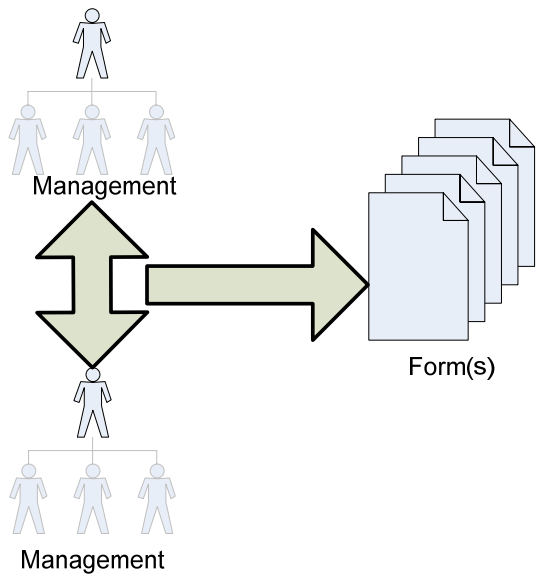
To improve the flow of employee personnel actions and increase timeliness, accuracy and authorization.

Before:

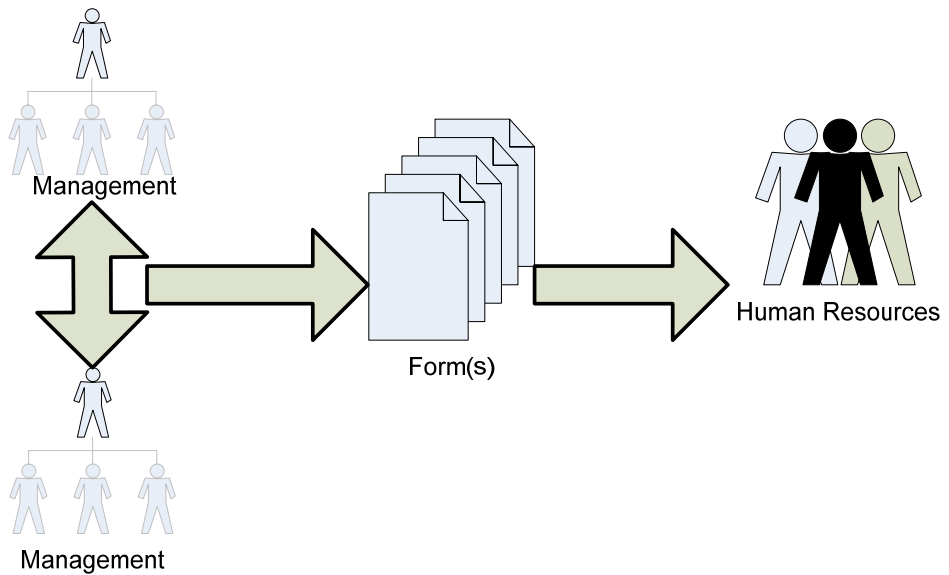
- ▶ *Paper forms completed by manager and properly authorized*
- ▶ *Interoffice mail used to send paperwork*
- ▶ *Changes or termination information manually keyed*

		EMPLOYEE CHANGE OF STATUS FORM	
			
FACILITY #	DEPT #	EMPLOYEE #	
EMPLOYEE NAME		EFFECTIVE DATE	
	FROM	TO	
FACILITY TRANSFER	_____	_____	
DEPT TRANSFER	_____	_____	
JOB TITLE	_____*	_____*	
HOURLY RATE	_____*	_____*	
ACCRUAL CODE	_____**	_____**	
SOCIAL SEC #	____/____/____	____/____/____	
BIRTH DATE	____/____/____	____/____/____	
MARITAL STATUS	_____***	_____***	
AUTO PAY	_____	_____	
OTHER:	_____	_____	
FIRST NAME	_____	_____	

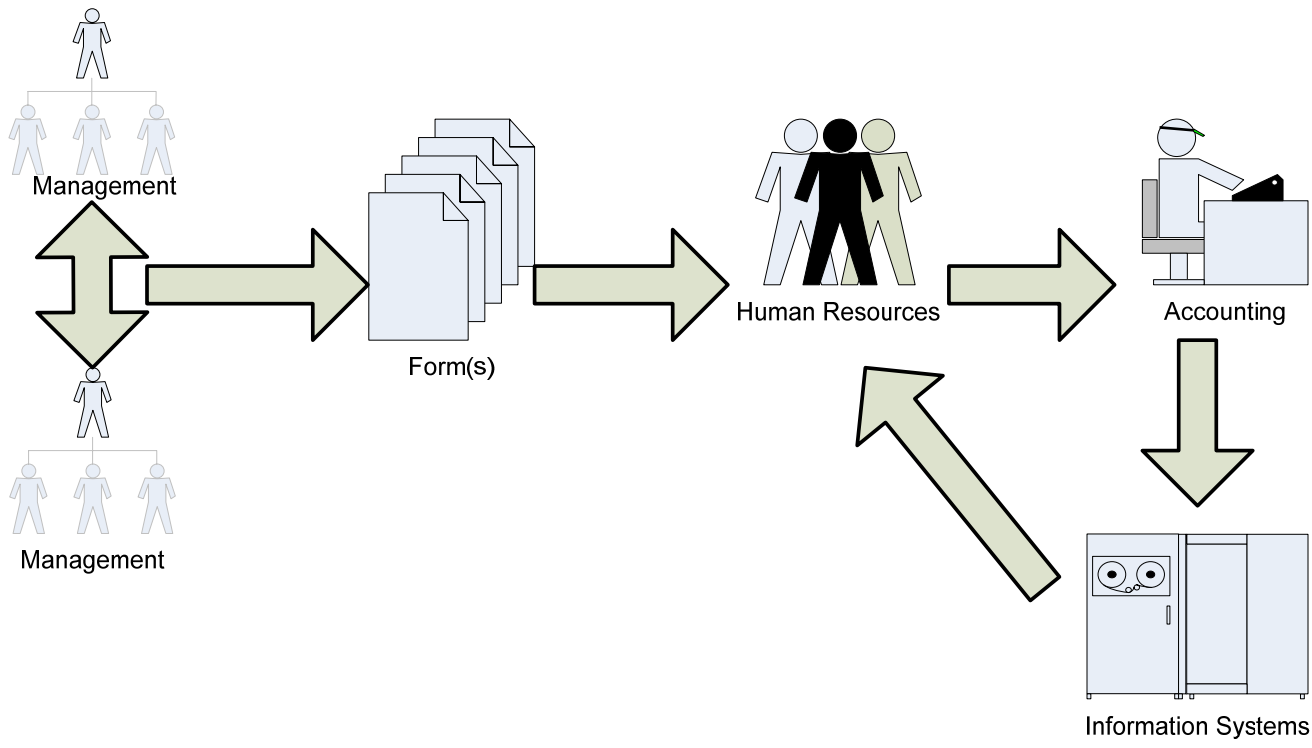
Before:



Before:

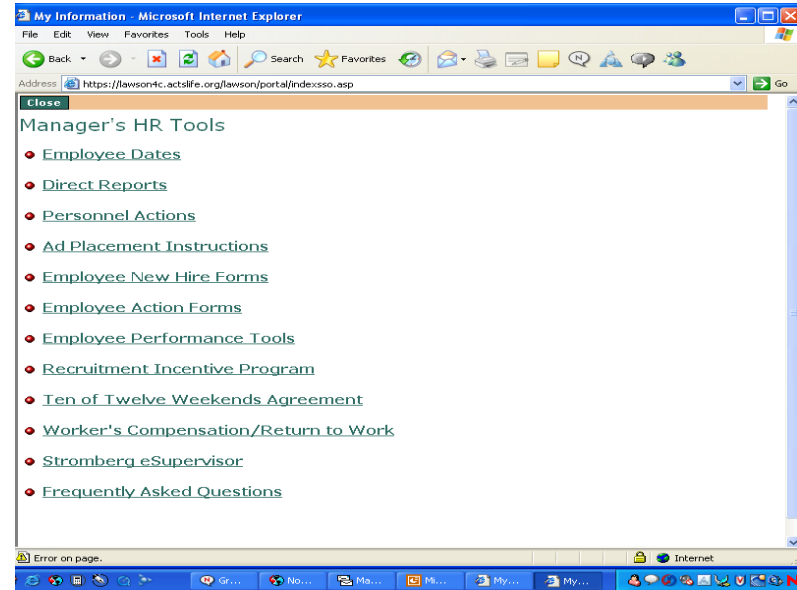


Before:

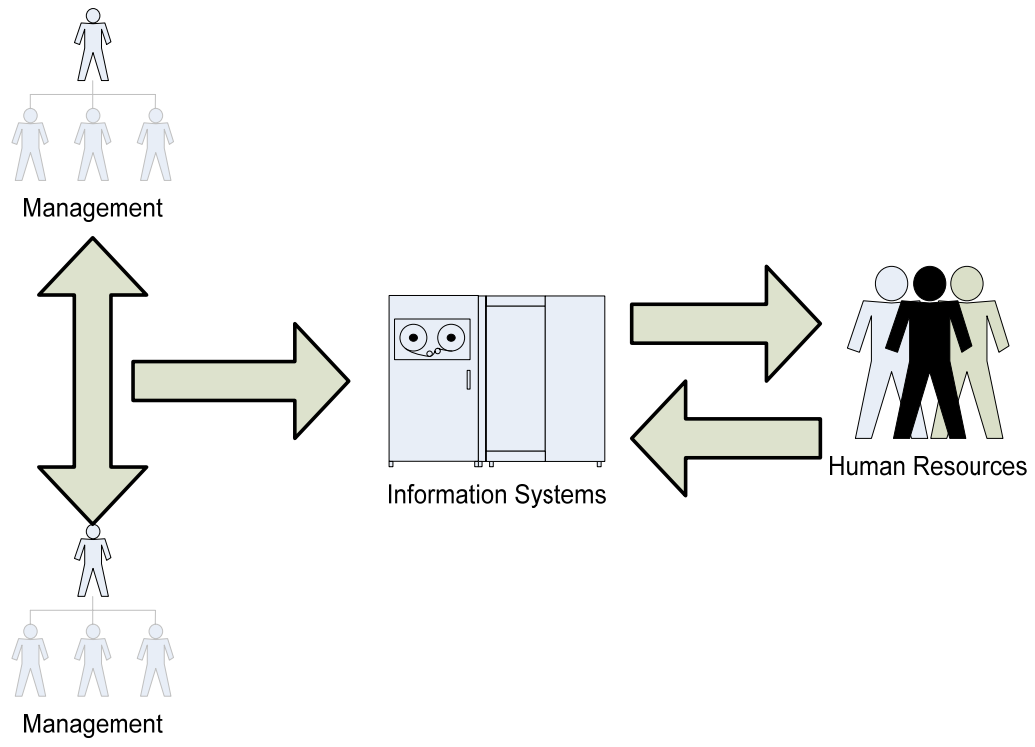


After:

- ▶ ***Manager enters changes online before, after or immediately upon the effective date of a change***
- ▶ ***ProcessFlow programming rejects actions which are entered incorrectly***
- ▶ ***ProcessFlow programming routes for approval***



After:



ACTS Retirement-Life Communities®

- Home - Administrative Tools - Communities/Locations - Departments - Documents Logout

Personal

- My Information
- Professional Development
- Employee Guide Book
- Department
- Password Registration
- Knowledge Pathways

Job Tools

- Groupwise
- Manager's HR Tools
- eReports Administration
- Dashboard
- Capital Project Approval
- Crystal Reports 10
- eReports
- InBasket
- Lawson Portal

Bulletin Board

Room Schedules - New and Improved!
Want to schedule a conference room at the Home Office or Support Services Center? Go to Administrative Tools, Room Schedules to see how easy it is to request a room.

W-2 Verification
W-2s will be mailed from the Corporate Office by January 31, 2008. To ensure accurate and timely delivery of your W-2, please verify your W-2 information. Click [here for instructions](#).

Alerts

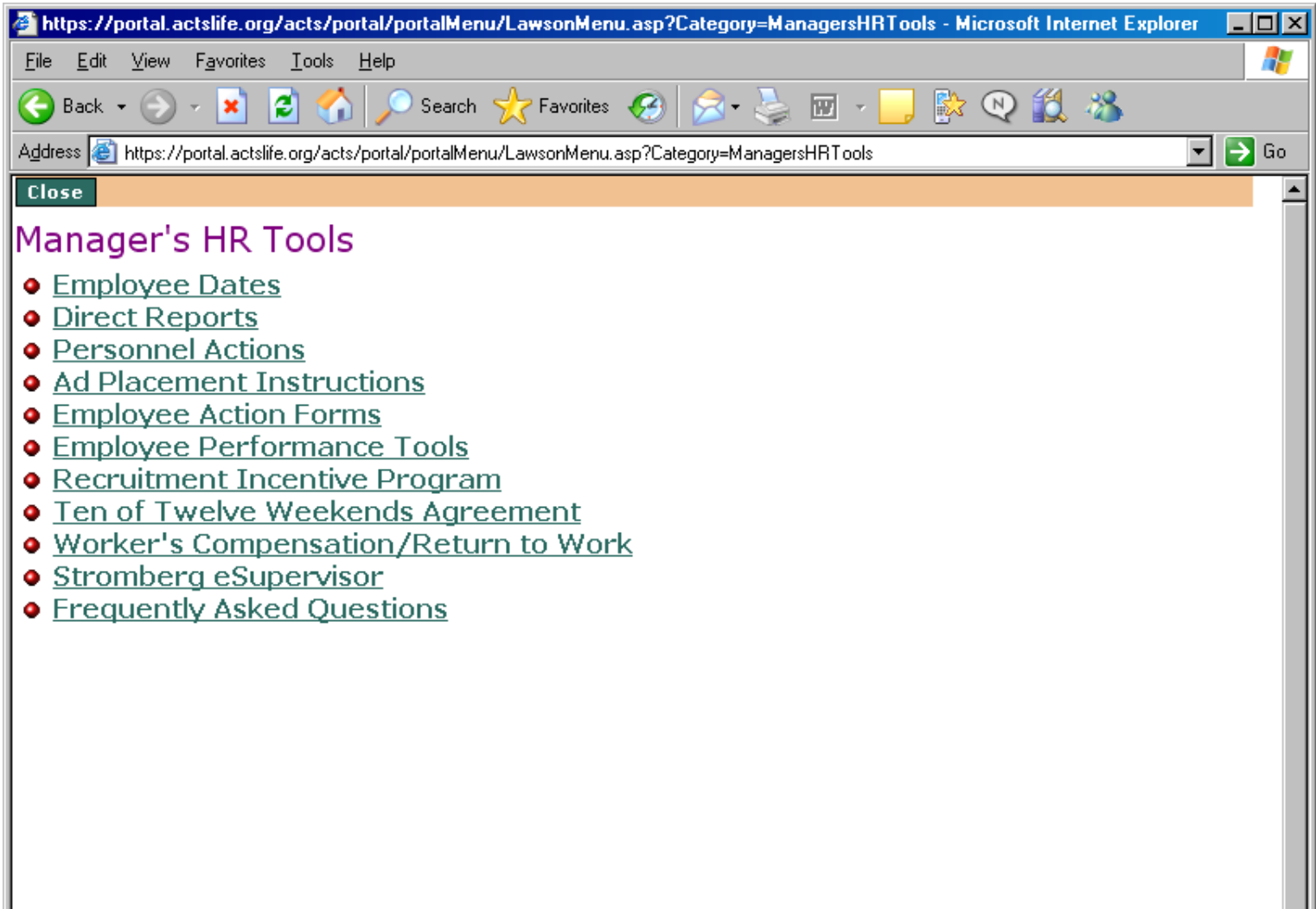
Resources

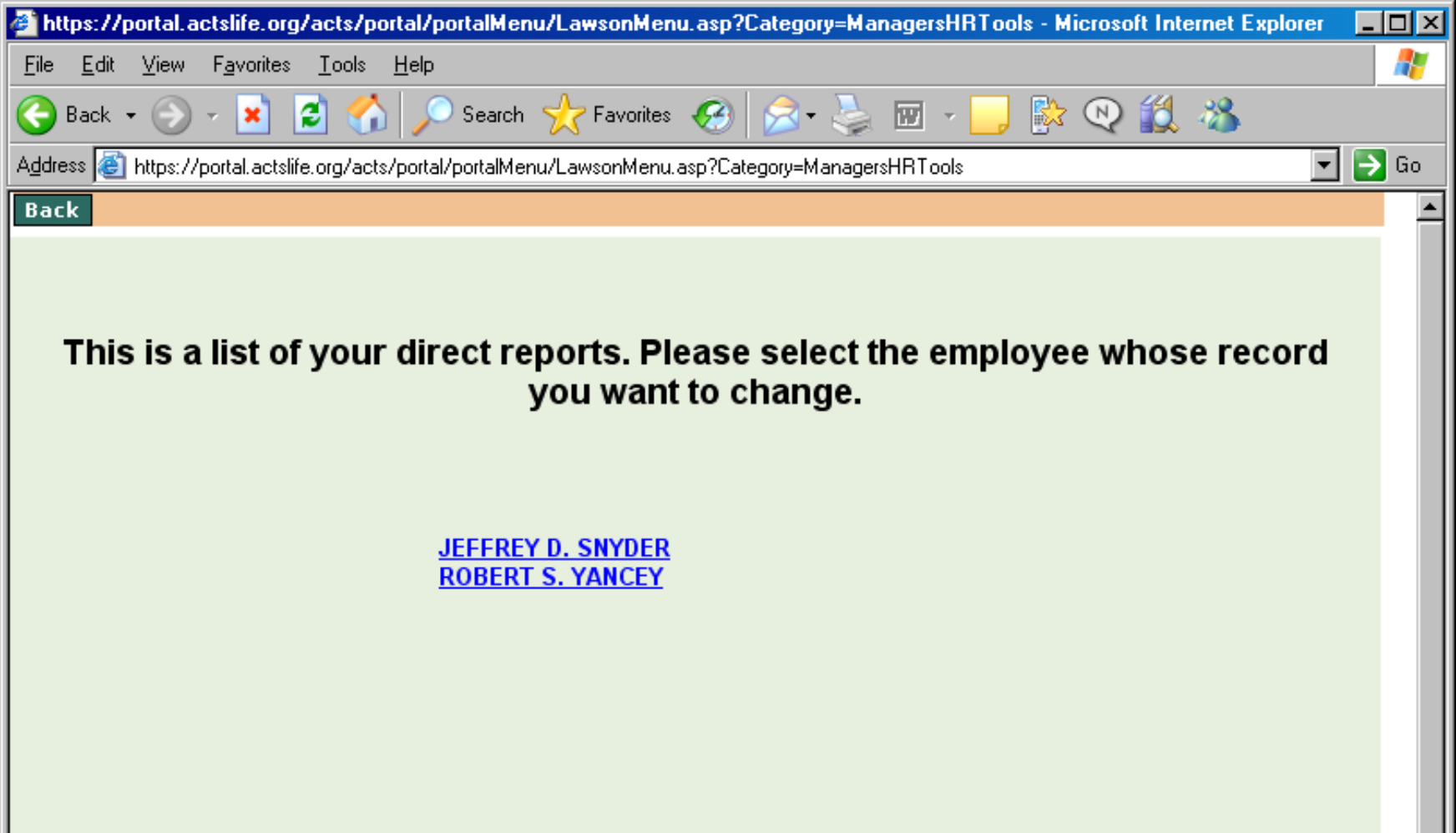
- Service Center
- ACTS Mission Statement
- Employee Directory
- Job Site
- Marketing Site
- Portal Suggestions

Of Interest

- ACTS Newsletters
- News
- Weather
- Corporate Picnic Photos

Internet





https://portal.actslife.org/acts/portal/portalMenu/LawsonMenu.asp?Category=ManagersHRT tools - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites


Address https://portal.actslife.org/acts/portal/portalMenu/LawsonMenu.asp?Category=ManagersHRT tools Go

Back

Select the Personnel Action you want to submit for
ROBERT S. YANCEY
Enter the Effective Date (mm/dd/ccyy)

[Hours Chg/Different Benefits](#)
[Hours Change/Same Benefits](#)
[Pay Change](#)
[Position Chg/Diff Benefits](#)
[Position Chg/Same Benefits](#)
[Separation](#)

Personnel Actions - Microsoft Internet Explorer

 Enter the **Hours Change/Same Benefits** for **YANCEY, ROBERT S..**
The action will be effective 01/18/2008.

This change will be pended for review

Reason 1 Reason 2

Field	Current Value	Change To
Status	A1	<input type="text"/>
Annual Hours	2080	<input type="text"/>
Payroll Rule	1EXEMPT	<input type="text"/>

Employee Self-Service

Objective:

To enable employees to easily access personal/work related information via the ACTS portal.

Before:

- ▶ Employees did not have immediate access to their position, rate, paycheck or benefit information

- ▶ Employees had to call payroll for copies of their checks and year end data

- ▶ Employees had to contact a manager or HR for benefit information



ACTS
Retirement-Life
CommunitiesSM
AUTHORIZATION AGREEMENT
FOR DIRECT DEPOSIT OF PAYROLL

DIRECT DEPOSIT ACTION(Please circle): START / CHANGE / STOP

NAME (print) _____

COMMUNITY: _____ EMPLOYEE #: _____

I hereby authorize ACTS, Inc. to initiate, change or terminate credit entries and debit entries, if necessary, and adjustments for any credit entries made in error to my/our account indicated below; and the depository named below to credit and debit the same entries to such account.

ACCOUNT TYPE (circle one) Savings / Checking (Default Account)

DEPOSITORY/BANK NAME: 1 _____

BANK TRANSIT #: _____ * ACCOUNT #: _____

ACCOUNT TYPE (circle one) Savings / Checking

DEPOSITORY/BANK NAME: 2 _____

BANK TRANSIT #: _____ * ACCOUNT #: _____

FLAT DOLLAR AMOUNT _____

ACCOUNT TYPE (circle one) Savings / Checking

DEPOSITORY/BANK NAME: 3 _____

BANK TRANSIT #: _____ * ACCOUNT #: _____

FLAT DOLLAR AMOUNT _____

This authority is to remain in full force and effect until ACTS, Inc. has received written notification from me to modify or terminate instructions in such time and in such manner as to afford ACTS, Inc. a reasonable time to act on it.

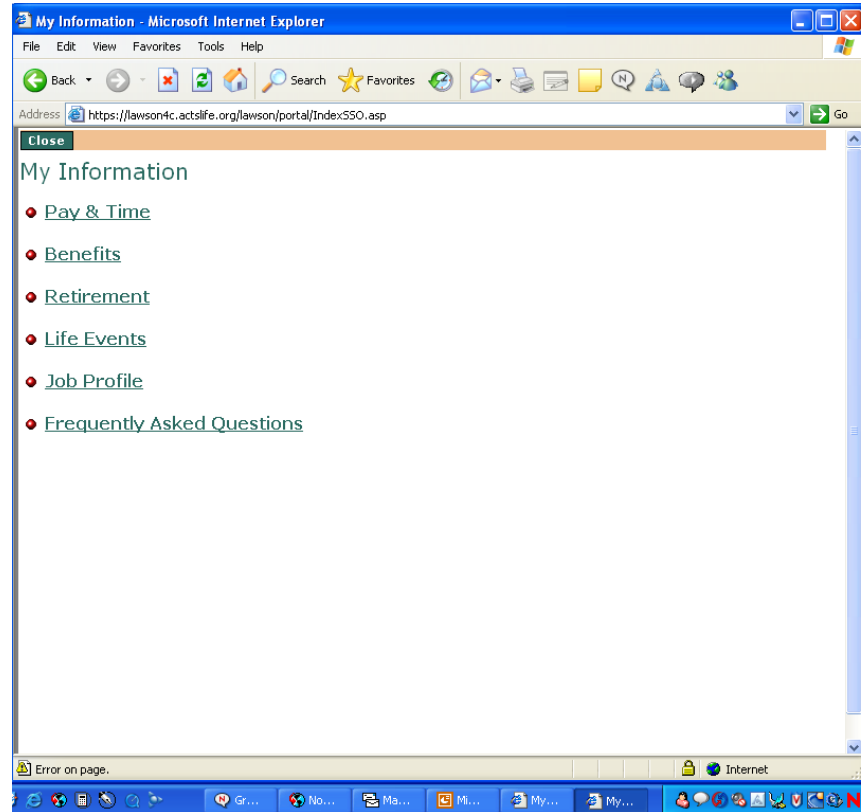
SIGNATURE: _____ DATE: _____

Note: Attach a voided blank check or deposit slip to validate account information.
* Please contact your bank to verify bank transit number.
* Please Note: You may have up to 5 accounts set up for direct deposit.

humres/forms/ddform.wpd

After:

- ▶ *Employee access to timecard, paycheck and benefit information via the ACTS portal*
- ▶ *Employee can print copies of their timecards or paychecks*
- ▶ *Links to benefit information sites*



The screenshot shows a web browser window displaying the ACTS Retirement-Life Communities website. The top navigation bar includes links for Home, Administrative Tools, Communities/Locations, Departments, Documents, and Logout. The main content area is divided into three sections: Personal, Job Tools, and Resources. The Personal section includes links for My Information, Professional Development, Employee Guide Book, Department, Password Registration, and Knowledge Pathways. The Job Tools section includes links for Groupwise, Manager's HR Tools, eReports Administration, Dashboard, Capital Project Approval, Crystal Reports 10, eReports, InBasket, and Lawson Portal. The Resources section includes links for Service Center, ACTS Mission Statement, Employee Directory, Job Site, Marketing Site, and Portal Suggestions. The Of Interest section includes links for ACTS Newsletters, News, Weather, and Corporate Picnic Photos. The central Bulletin Board features two announcements: 'Room Schedules - New and Improved!' and 'W-2 Verification'. The Alerts section is currently empty.

ACTS Retirement-Life Communities®

- Home - Administrative Tools - Communities/Locations - Departments - Documents - Documents Logout

Personal

- My Information
- Professional Development
- Employee Guide Book
- Department
- Password Registration
- Knowledge Pathways

Job Tools

- Groupwise
- Manager's HR Tools
- eReports Administration
- Dashboard
- Capital Project Approval
- Crystal Reports 10
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Bulletin Board

- Room Schedules - New and Improved!**
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Alerts

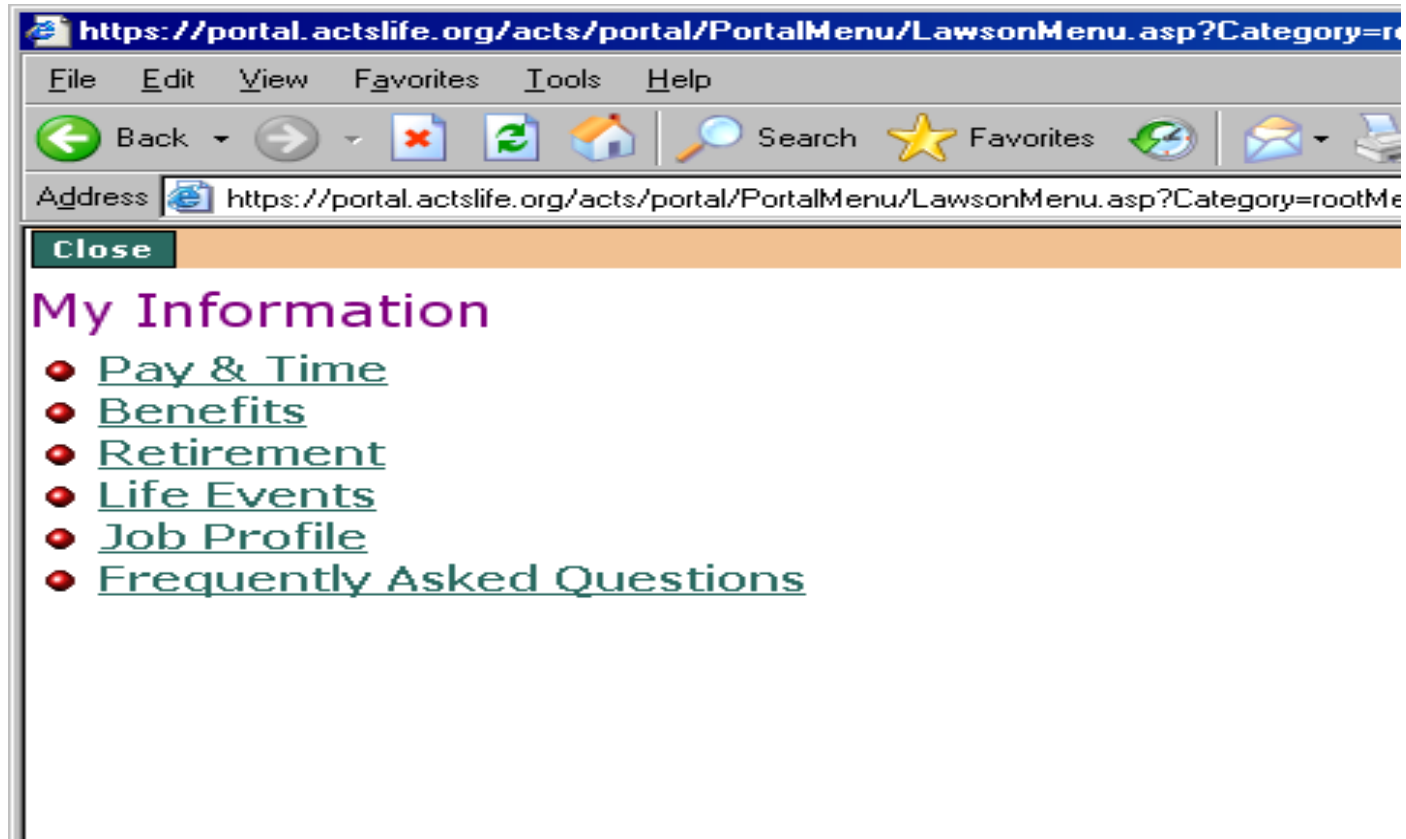
Resources

- Service Center
- ACTS Mission Statement
- Employee Directory
- Job Site
- Marketing Site
- Portal Suggestions

Of Interest

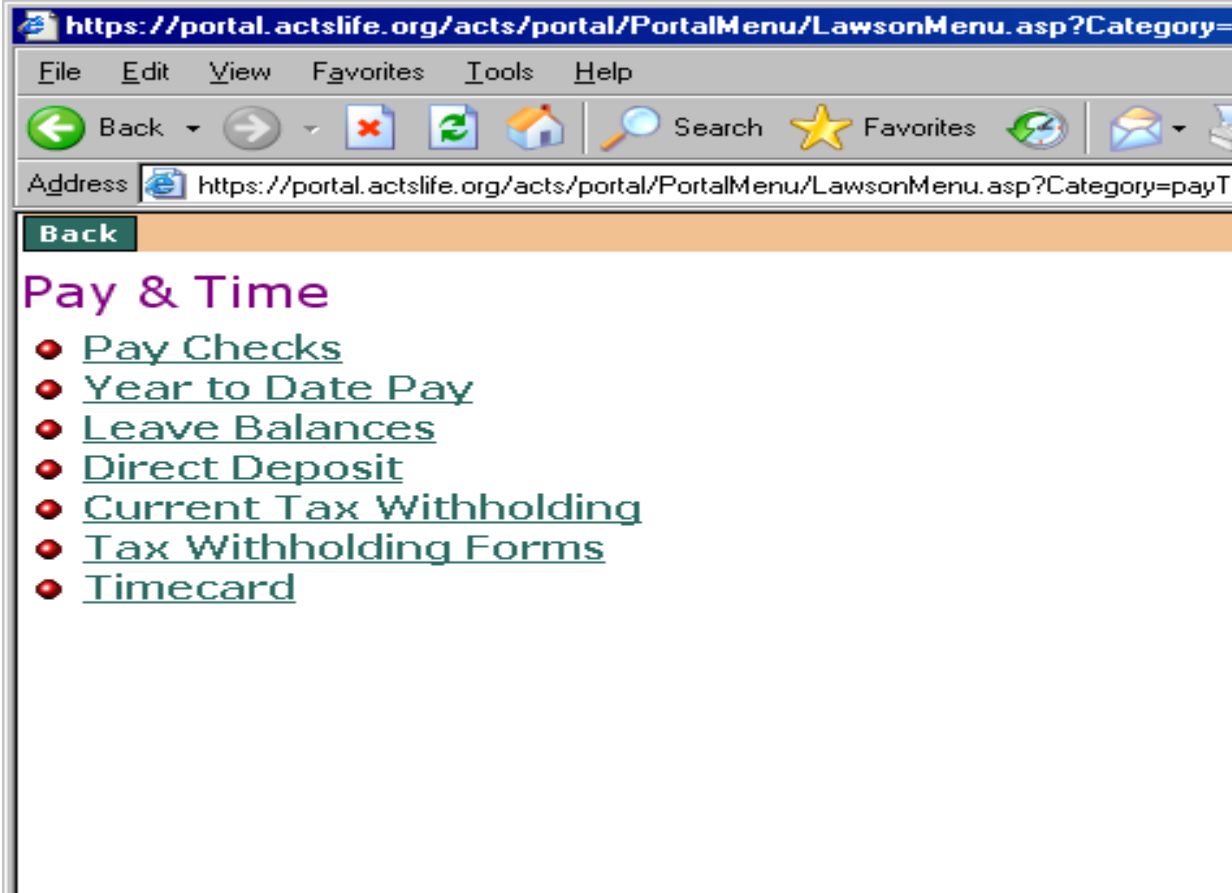
- ACTS Newsletters
- News
- Weather
- Corporate Picnic Photos

Internet



The screenshot shows a web browser window with the following elements:

- Address Bar:** <https://portal.actslife.org/acts/portal/PortalMenu/LawsonMenu.asp?Category=rootMe>
- Menu Bar:** File, Edit, View, Favorites, Tools, Help
- Navigation Bar:** Back, Forward, Stop, Refresh, Home, Search, Favorites, Print, Mail
- Close Button:** Close
- Section Header:** My Information
- List of Links:**
 - Pay & Time
 - Benefits
 - Retirement
 - Life Events
 - Job Profile
 - Frequently Asked Questions



The screenshot shows a web browser window with the following elements:

- Address Bar:** <https://portal.actslife.org/acts/portal/PortalMenu/LawsonMenu.asp?Category=payT>
- Menu Bar:** File, Edit, View, Favorites, Tools, Help
- Navigation Bar:** Back, Forward, Stop, Refresh, Home, Search, Favorites, Print, Mail, Print Preview
- Content Area:**
 - Back** (button)
 - Pay & Time** (Section Header)
 - [Pay Checks](#)
 - [Year to Date Pay](#)
 - [Leave Balances](#)
 - [Direct Deposit](#)
 - [Current Tax Withholding](#)
 - [Tax Withholding Forms](#)
 - [Timecard](#)

Future Initiatives

- Further enhancements of Employee & Manager Self-Service
- *Incorporate Smart Notification for notifications*
- *Electronic notification of how job changes effect benefits*

Future Initiatives

Applicant Tracking / E-Recruiting

- *On-line applications*
- *Shared access to applicants*
- *Electronic transfer to Lawson upon hire*

Future Initiatives

Enhance Self-Service Capabilities – Benefit enrollment

- *Enable employees to make Life Event changes for qualifying events which include: marriage, divorce, legal separation, birth, adoption, spouse employment change*
- *Enable employees to make online changes to benefits triggered by a personnel action change (i.e., FT to PT)*

Challenges

- **Computer skills**
- **Language barriers**
- **Passwords, passwords and passwords**

Questions?

For more information go to www.lawson.com
or call 1-800-477-1357



Webinar Series October 20 – October 24

▶ **Monday, October 20**

[Road to Budgeting & Planning 9.0](#)

10 am CST

▶ **Tuesday, October 21**

[Getting Everyone in the ACT Through Self Service HR](#)

10 am CST

▶ **Wednesday, October 22**

[Taking Inventory of Mobile Supply Chain Management](#)

10 am CST

Thursday, October 23

[Banner Savings With Employee and Manager Self Service](#)

10 am CST

[Increase Your IQ on Lawson Business Intelligence](#)

1 pm CST

Friday, October 24

[Getting on Solid Ground with Joint Commission Compliance](#)

10 am CST

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