Employee Certifications and Reminders

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Creating a Certification or Reminder

1. From the Gearwheel Menu, go to Reminders, Certifications & Custom



2. From the Certification page, press **Create a Reminder or Custom Input** to add custom reminders as shown in the image below:



3. Add certifications to the appropriate locations or departments:

Guest House	
Bar	
Guest House Bartender	3 of 4 Reminders Selected 🔨
Weekly Barprep Tip	All Reminders
Bar Prep Tip Out	ABC Certificate
Home	Health Certificate
FOH	Sexual Harassment

Applying Certification Date or Anniversary to Employees

1. Go to the employee profile, and select their **Reminders, Certs & Custom Input** tab.

2. Enter Certification Start Date, and Expiration Date. Or, in the event of an Anniversary, use the Interval as the entry.

Edit Availabilit	ty, Days Off and A	Activate/Inactivate]					Back to Employee List
Profile Sc	chedules / Roles	Salary / Wages	Permissions	Alerts	Reminders, Certs & Custom	nput Manage	er Notes	
Reminder	Start De	ate			Туре			
Guest Hous	e Bartender							
	text her	e				le		
ABC Certific	cate text her	e 🗸				li		
Health Cert	tificate	Exp	iration ify Employee	÷	Repeating Interval Years	~]]		Drop Your File Here
Sexual Hard	assment (text her	e				li		

Viewing Approaching Dates and Receiving Alerts

Running a Report

From Reports, Select Reminders and Certifications

Enter dates and criteria for search, and Show Report

Reports	(an news) Last Pay Period was Monday Dec 25, 2023 5:00am to Sunday Jan 7, 2024 (an news) Current Pay Period is Monday Jan 8, 2024 5:00am to Sunday Jan 21, 2024
Reminders & Certifications Mar L 2023 to Sep 15,	Show Report
HTML / PDF / CSV Report Status Delete All Reports Status Requested on Time Name Download / Open	

Setting Alerts

To set alerts for approaching expirations, go to a manager's Admin Alerts



Choose preference for Dashboard, Text, or Email

	Warn on Employee Reminders & Certifications	10 of 20 Alert Deliveries	^
+	Warn on Reminders & Certifications Image Upload	All Schedules	^
	If Required Clock-In/Out Prompt Succeeds/Fails	 Dashboard Txt Message 	0
	Email Only (s	Email	0
	Alert Description	 Push Notifications Bar Prep Tip Out 	S
	Clock-In/Out () Changes-Only or) All) Notes sent at End of Day	Dashboard Tyt Message	Ø
	Clock-In/Out (Changes-Only or All) Notes sent at End of Week		0
	Detail Daily / Weekly Analytics Email	Push Notifications Home FOH	•
			1.0