# HUMAN RESOURCE MANAGEMENT AND ADMINISTRATION REQUIREMENTS

## CORE HUMAN RESOURCES

### Organization Structure and Hierarchy

* The system will provide an option for making a flexible organization structure and reporting relationships between different positions.

###  Salary scale and placement/ post definition

* The system will enable capture of details (e.g. rank, division, job title, Job Description etc) of various positions within the organizations and the authorized posts for each rank.

### Employee details

* This section captures all the personal details of an employee (e.g. Name, Employee No., Date of birth, sex, Salary scale, Division/Unit, Job grade, Date of appointment, education level and qualification, contractual agreement etc.) and other related details such as employee’s next of kin and their details(names, ages, sex, relation to employee etc). The system will allow addition or deletion of information only by authorized persons and keep an audit trail of who and when such changes were made.

### Recruitment

* The system will enable capture of post to be filled, advertising, qualifications required, short listing, interviewing and results (scores), confirmation of appointment and capture into the organization’s employee master record.

### Casuals

* The system will recruit and manage casual workers.

###  Leave

* The system will be able to capture leave roster and annual leave entitlement for each employee, type of leave, planned start date, end date, duration, leave allowance (if any), month due and leave balance.
* The system will also allow individual employees to apply for leave online and truck the progress of their application.

#### Leave types

* Annual leave
* Paid study leave
* Unpaid study leave
* Maternity leave
* Compassionate leave
* Annual special holiday leave
* Sick leave
	+ - Terminal leave

### Discipline

* The system will have provision for disciplinary measures for various offenses by employees. Since the nature of offenses may vary widely, the system should be able to capture in descriptive format the offense committed by the employee and disciplinary procedures to be followed.
* List the categories of offenses. An offense committed by employee should fall into one of these categories.
* Type the action taken e.g. warning, suspension, interdiction, demotion, demotion, demotion in rank etc as outlined in the disciplinary procedures.
* Disciplinary appeals and their outcome.

### Loans management

* The loans management system will define loan type and entitlement per scale and the condition and requirements that apply for each type of loan. This may include Collateral security requirement.
* Employee will be able to make their own loan application online and the system should make preliminary assessment on the eligibility of the employee and automatically advice the applicant. The report should include the net pay after the loans has been affected.
* Employees will be able to track their loan application on-line.
* Once the loan has been approved, the system will connect the approved loan to payroll system.
* Will show amount borrowed, recovery period, repayment progress, monthly installments and interest and the outstanding balance.

### Performance Appraisals

* The system will provide for categories of staff e.g. the appraisal for management and non- management staff.
* Types of Appraisal e.g. annual, confirmations, special
* User defined Performance attributes and rating
* The system will be able to carry out staff appraisal online
* Total points score, Recommendation and action taken.

####  Time Management

Time management will track how employees’ spend their time and the real labor costs on a project-by-project basis. The system’s main functionality should include

* **Time tracking**-Tracking of time spent by a particular employee on an assignment in any particular day
* **Assignments Tracking** – Tracking of assignments, sorting by status, and objects affected etc.
* Should be part of the Human Resources Management system

**The system should be capable of among other things:-**

1. Give detailed report on employees, tasks, assignment and projects
2. Plan personnel requirements and job scheduling
3. Allows the working hours log with respect to assignments and projects
4. Allow users to track their work.
5. Locate and place personnel on best-suited tasks, assignments and projects
6. With respect to a particular assignment, details of the Problem, Solution and Analysis should be captured as well as the various stages the assignment has gone through, and time taken at each stage.
7. Have a relation to the performance appraisal capability of the Human Resource system

#### Training and development

The system will be able to capture and provide the following information on staff training and development:

* Training need analysis and recommended training
* Educational level
* Courses previously attended ,place, date, duration, Course Title and Resource Personnel and qualifications attained
* Training costs:
* Tuition
* Air Tickets
* Subsistence allowance paid
* Name of training sponsor
* Training annual budget per cost center, monthly/quarterly, and annual.
* The system should automatically query the Expenditure and balance per cost center and advice on the availability of fund for the requested training.
* Postgraduate Programs
* Professional Courses
* Conferences, Seminars & Workshops
* Induction programmes.
* Capacity building programmes
* Feedback analysis
* Training inventory skills
* Types of training e.g. in-house, professional
* Strategic planning.

####  Insurance Categories e.g. Group life insurance, motor vehicle, Fire

The system will capture the various types of insurances and related information such as:-

* Effective date, expiry date and annual premiums.
* Date of the insured and benefits.
* Terms of the policy
* Claim Procedures
* Maximum compensation in Kenyan Shillings.

### Medical

Manage an internal medical scheme whose procedures and conditions may vary from those of other medical insurance schemes. The system supplier will therefore tailor the medical module to suit the specific requirements. The procedures for the various types of schemes are detailed below.

####  Outpatient

 Under the outpatient scheme, every employee is entitled to an annual allotment which is supposed to be spent by the officer, his spouse (one) and all children aged below 22 years while seeking outpatient medical services. This amount must reduce according to usage and any amount not spent cannot be carried forward to the next financial year. Similarly if an employee has exhausted his allotment and still requires further outpatient treatment within the year, then the officer must apply for a further allotment known as outpatient ex-gratia to be incurred by both the Organisation and the employee in the following proportions:

####  Outpatient ex-gratia

* 80% Employer – Paid by the employer
* 20% Employee (to be recovered thru payroll)

At the moment, members of staff are treated at the approval hospitals on credit, and the bills settled as per the terms of agreement with the hospital.

#### Inpatient

The inpatient scheme covers all employees and their spouses (one) and all the employee’s children who are aged below 22 years. The scheme is only effective when admitted to a hospital, which have a credit arrangement with the company, or to any other NHIF approved hospital.

The Organisation requires a medical module capable of among other functions, capturing following information:

1. The Organisation approved hospitals and their respective Credit arrangements and the refundable deposit held at the hospital.
2. All the NHIF approved hospitals
3. Details f the invoices
4. Inpatient bills from the hospital and also from private doctors attending to the patient
5. Details of the admitted person and in case of an employee’s dependant, the particulars of the dependant, the particulars of the dependant and relation to employee and the system should verify whether the details are tallying with the information stored in the official database.
6. Date of admission, Treatment and date of discharge. The system should also compute the duration of admission and the accrued amount.
7. Keep information on medical expenditure for every employee.

## REPORTS

The system will allow the user to select fields to extract data and generate reports I various formats such as tables, graphs, bar charts etc. The system should be flexible such that it can pick relevant data from various tables in the database and generate any *ad hoc* report that may be required by the management from time to time. Among the reports the system is expected to produce are:-

* List all employee details, e.g. Personal File Number, Name, Date of birth, Date of Appt, Department, Rank, and Salary etc
* List of employees per, Department, Cost Centre, group by scale etc
* List of staff recruited within the year
* List of staff due for confirmation.
* List of employees due for retirement within a specified time
* Position status report.
* Leave reports
* Training needs analysis such as number of staff trained per department per month or year, training cost and future staff training requirements
* Performance appraisal report
* Various loan applications and their status
* Medical reports such as annual expenditure per employee, department and corporate
* Manpower plans report
* Monthly and annual reports on various insurance policies for staff and assets. The reports should show such details as commencement date, expiry date, type of policy, value, payment status etc.