

iVisions – Employee Group Cheat Sheet

1. Payroll → Configuration → Groups → Add a New Group

* If you already have a group(s) setup, you will see them in the grid; otherwise the screen will be blank.

The screenshot shows the iVisions software interface. At the top, there are navigation tabs: Clipboard, Procedures, Sort and Filter, Find, Sum Columns, and Records. Below these is a blue header bar with a 'Groups' tab selected. The main area is a grid titled 'Employee Groups' with two columns: 'Name' and 'Description'. The grid is currently empty. In the bottom right corner, a dialog box titled 'Add Employee Group' is open. It contains a 'Group Information' section with two text input fields: 'Name' and 'Description', both containing the text 'Medicaid Reporting Payroll Journal by Group Sample'. Below the input fields is a mode selector showing 'Mode: Add' with navigation arrows. At the bottom of the dialog, there is a checked checkbox labeled 'Close this dialog after update?' and three buttons: 'OK', 'Cancel', and 'Help'.

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2. Payroll → Employees → Employee Groups

Employee Groups

Filter Criteria

Employee: Employee ID:

Group:

Include Archived Employees

Group	Description
Medicaid Reporting Payroll Journal by Group	Medicaid Reporting Payroll Journal by Group

Apply Selection

Clear Selection

Employee Groups						
Employee Record ID	Name	Mask SSN	Group Name	Description	EmployeeID	LICENSE #

* Here is where you tie employees to the Medicaid Group you just created. You start by selecting the name of the Group in the “Group Drop Down Box”.

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3. Actions → Select “Assign Selected Group to Selected Employees

The screenshot shows the iVisions software interface. The 'Actions' menu is open, and the option 'Assign selected Group to Selected Employees' is highlighted with a red circle. The interface includes a menu bar (File, Edit, View, Help), a toolbar with various icons, and a main workspace area. The workspace area contains a 'Filter Criteria' section with dropdown menus for 'Employee' and 'Group', and buttons for 'Apply Selection' and 'Clear Selection'. Below the workspace is a table titled 'Employee Groups' with columns for 'Employee Record ID', 'Name', 'Mask SSN', 'Group Name', 'Description', 'EmployeeID', and 'LICENSE #'. The 'Group' dropdown menu is currently set to 'Medicaid Reporting Payroll Journal by Group Sample'.

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4. Select Desired Employees → Click “Ok” to Save Changes

The screenshot shows the 'Select Employees' dialog box in the iVisions software. The dialog box has a 'Filter Criteria' section with a 'Group' dropdown menu set to 'Medicaid Reporting Payroll Journal by Group Sample'. Below this is a table of employees with the following columns: Select, Emj, Nam, LICENSE #, Check, Issue Pay Check, Emj, and Employee Address Line 2. The table contains 15 rows of employee data. At the bottom of the dialog box are buttons for 'OK', 'Cancel', and 'Help'.

Select	Emj	Nam	LICENSE #	Check	Issue Pay Check	Emj	Employee Address Line 2
<input checked="" type="checkbox"/>	AU5	AUTF		HIGH SCHO	<input checked="" type="checkbox"/>	P. O.	
<input checked="" type="checkbox"/>	BE7	BELL		ELEMENTA	<input checked="" type="checkbox"/>	P. O.	
<input checked="" type="checkbox"/>	BR9	BRDV		SUBSTITUT	<input checked="" type="checkbox"/>	P. O.	
<input type="checkbox"/>	BU6	BURF		MAINTENAN	<input checked="" type="checkbox"/>	P. O.	
<input type="checkbox"/>	CO4	COGE		ELEMENTA	<input checked="" type="checkbox"/>	P. O.	
<input type="checkbox"/>	CO4	COGC		ADMINISTR	<input checked="" type="checkbox"/>	P. O.	
<input checked="" type="checkbox"/>	CO7	COX		HIGH SCHO	<input checked="" type="checkbox"/>	P. O.	
<input type="checkbox"/>	DA5	DAVIS		INSTRUCTI	<input checked="" type="checkbox"/>	26 C	
<input checked="" type="checkbox"/>	DU1	DUNL		HIGH SCHO	<input checked="" type="checkbox"/>	P. O.	
<input checked="" type="checkbox"/>	DU1	DUNS		HIGH SCHO	<input checked="" type="checkbox"/>	P. O.	
<input checked="" type="checkbox"/>	ER7	ERRA		HIGH SCHO	<input checked="" type="checkbox"/>	P. O.	
<input checked="" type="checkbox"/>	GR7	GRAY		SUBSTITUT	<input checked="" type="checkbox"/>	P. O.	
<input type="checkbox"/>	HA1	HARE		FOOD SERV	<input checked="" type="checkbox"/>	6401	
<input type="checkbox"/>	HI95	HIND		HIGH SCHO	<input checked="" type="checkbox"/>	HC 3	
<input type="checkbox"/>	HO9	HOBE		SUBSTITUT	<input checked="" type="checkbox"/>	P. O.	
<input type="checkbox"/>	HU0	HUDS		SUBSTITUT	<input checked="" type="checkbox"/>	P. O.	

* This list will only show active employees.

5. Your Group is now established and can run a Payroll Journal Report for just the employees within the NM Medicaid Group!!