With Employee Date Tracking you can keep track of employee physicals, CPR license, auto insurance, and whatever else you would like. You can generate a report that tells you what is due / expiring.

From the **Man Menu** in Barnestorm Office click on **Codes > Other Basic codes > Employee Date Tracking**.

- Enter the employee four digit number in the **Employee** field, a list of items will appear in the right-bottom panel.
- Uncheck the **Active Only** box if the employee has been terminated in the Barnestorm system.
- Click on a code that you want to track.
- Change the **Date** from the top-left side to the expiring or due date.
- Check the **Declined** button if the employee has declined that code. The date will change to 1/1/1900.
- Click on **Save**.
- Continue selecting codes and changing dates for that employee or change employee number to edit another employee.
- To erase a date enter the employee number and click on the item. Click on the **Remove** button, this will blank out the date.

<u>Print Report for All Code Entries:</u>

- From the top-right panel change the **From** and **Thru** dates to the time frame you wish to view expiring codes.
- Select the sequence you would like to use. Sequence #1 uses lines on the report to divide out your selection. Sequence #2 does not use lines.
- If you would like to only print select Office data, enter the Office code inside of the **Office(s)** field. Use a space to separate multiple codes.
- Click on the **Print All** button.

Print Report for One Code Only:

- From the bottom-right panel select the code you want to track.

- Select the sequence you want to use.
- To select multiple codes check the box **Allow Multiple Codes to be Selected for Printing.** Select each code from the **Employee date codes** list.
- Click on the **Print Code** button.

Print Declined Codes:

- Click the Print Declined button.
- This will print all declined codes.

Other Report Features:

- When using the **Print Code** or **All Expiring** to print, it will print for all employees. Use the **Print Just This Employee** to only print the employee currently pulled up.
- Check **Missing Dates Only** and then **Print All** to view all active employees who have codes without a date. This will ignore the From and Thru date selection and only print codes without a date (does not print codes with a date).
- Check **Include Employees/Codes with no dates** to include codes without a date yet to your print selection. This will ignore the From and Thru date selection and will print both codes with dates and without dates.
- Check **Include Contractors** to include contracted employees (they will have ** in the Vendor field of the employee code setup).
- To add more codes to track, see attached article Edit Employee Date Codes.