Employee Job Record Changes

Human Resources Front End

How-To Guide

HR Front End Training Team

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APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon

- Do not share your passwords or store them in an unsecured manner.
- Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information

- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.

HR Front End Employee Job Record Changes Quick View

1. Locate the employee's record
2. Enter the change date in the date field and click View
3. Select Employee Job Record Change from the Transaction Menu.
4. Change the appropriate job data, select a Job Change Reason, and Save
5. Review the proposed changes in the Employee Record View.
6. Transaction is routed and applied to Banner.

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Introduction

Assumptions

This guide assumes that you have completed the *HR Front End Overview and Navigation* online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the *HR Front End Overview and Navigation* course is not repeated in this guide.

What Is an Employee Job Record Change?

Employee Job Record Changes are changes made to Job or Position Data in the HR Front End Application. Examples of these type(s) of changes are:

- Salary Changes
- FTE Changes
- Labor Distribution Changes
- Work Schedule Changes

Conventions Used in this Guide

Indicates a **Note** or additional information that might be helpful to you.

Indicates a **Hint** such as a tip, shortcut, or additional way to do something.

Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.

Completing an Employee Job Record Change

The Employee Job Record Change transaction is completed directly in the Employee Record View screen. It is important that the View Date be set to the date the change should occur prior to selecting the transaction type.

Changing Job Detail

1. Use the **Employee Search** to locate the employee and open the Employee Record View (ERV).

The Employee Search screen is displayed. (See Figure 1: Employee Search Screen)

2. Select the desired employee from the search results and click **Select**.

The Employee Record View is displayed.

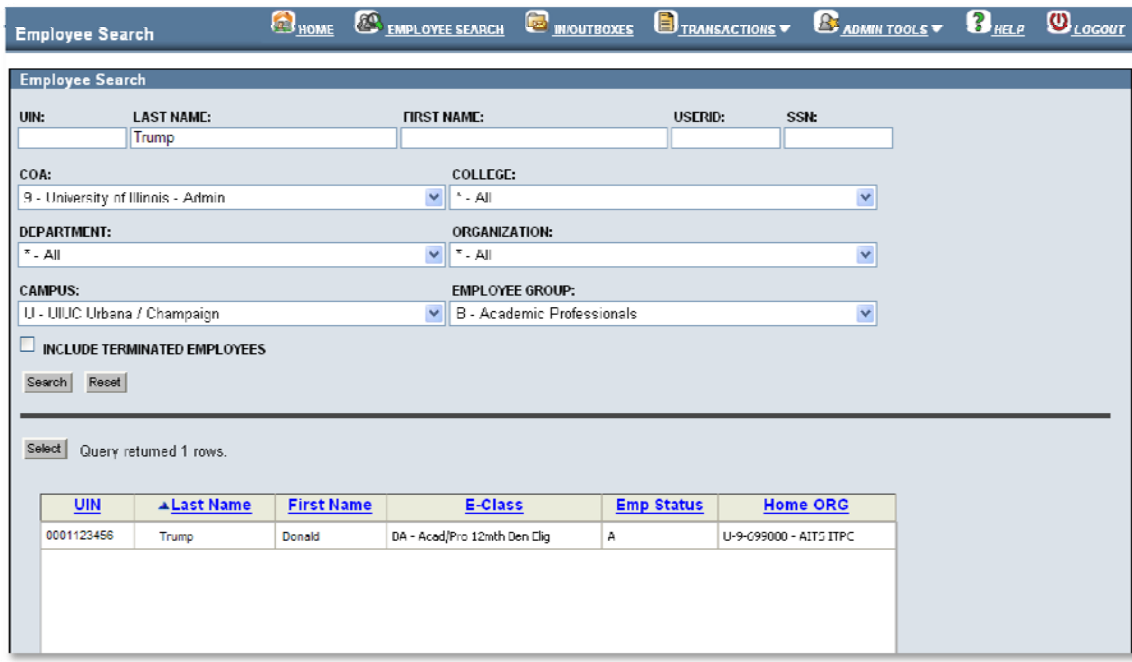


Figure 1: Employee Search Screen

3. Enter the date the change should be effective in the **Date** field, and then click **View**.

Screen refreshes and displays Employee Record View for the date selected.

4. From the **Transactions** menu, select **Employee Job Record Change**.

Screen refreshes and transaction type is displayed on the Transaction Bar.

5. Expand the appropriate **Job Detail** Accordion.

Current Job Detail is displayed.

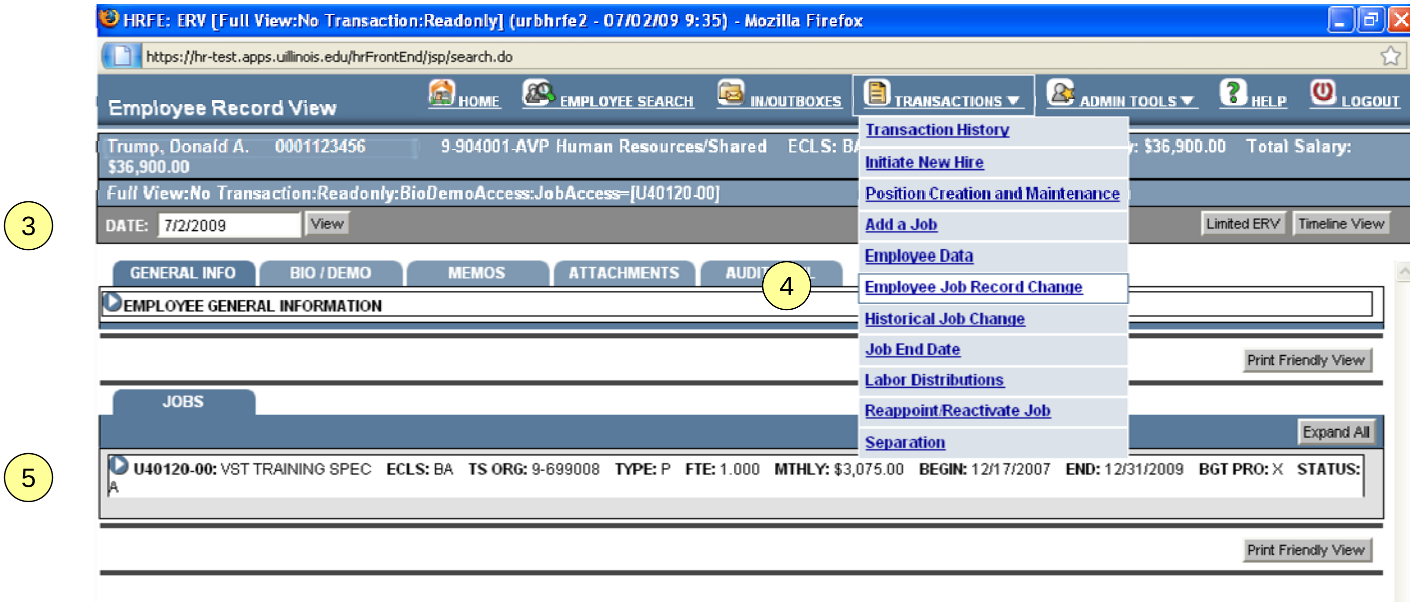


Figure 2: Beginning an Employee Job Record Change

6. Edit the necessary fields (for example **Job FTE** or **Pay Rate**) and press **Tab**.

   User implemented changes display in Red. System Changes display in Green.

7. Select a **Job Change Reason**.

   New Job Change Reason is displayed in Red.

8. Enter **Job Comments** and click **Add**. (if necessary)

   Job Comments are saved.

9. Click **Save**.

   Changes are saved and are displayed under Proposed Changes

Routing the Transaction

To move the transaction to the next stop on the route path:

1. Click **Route**

   Any informational or error messages are displayed in the yellow message area in the Employee Record View. If transaction is routed successfully, message will display showing the routing destination.

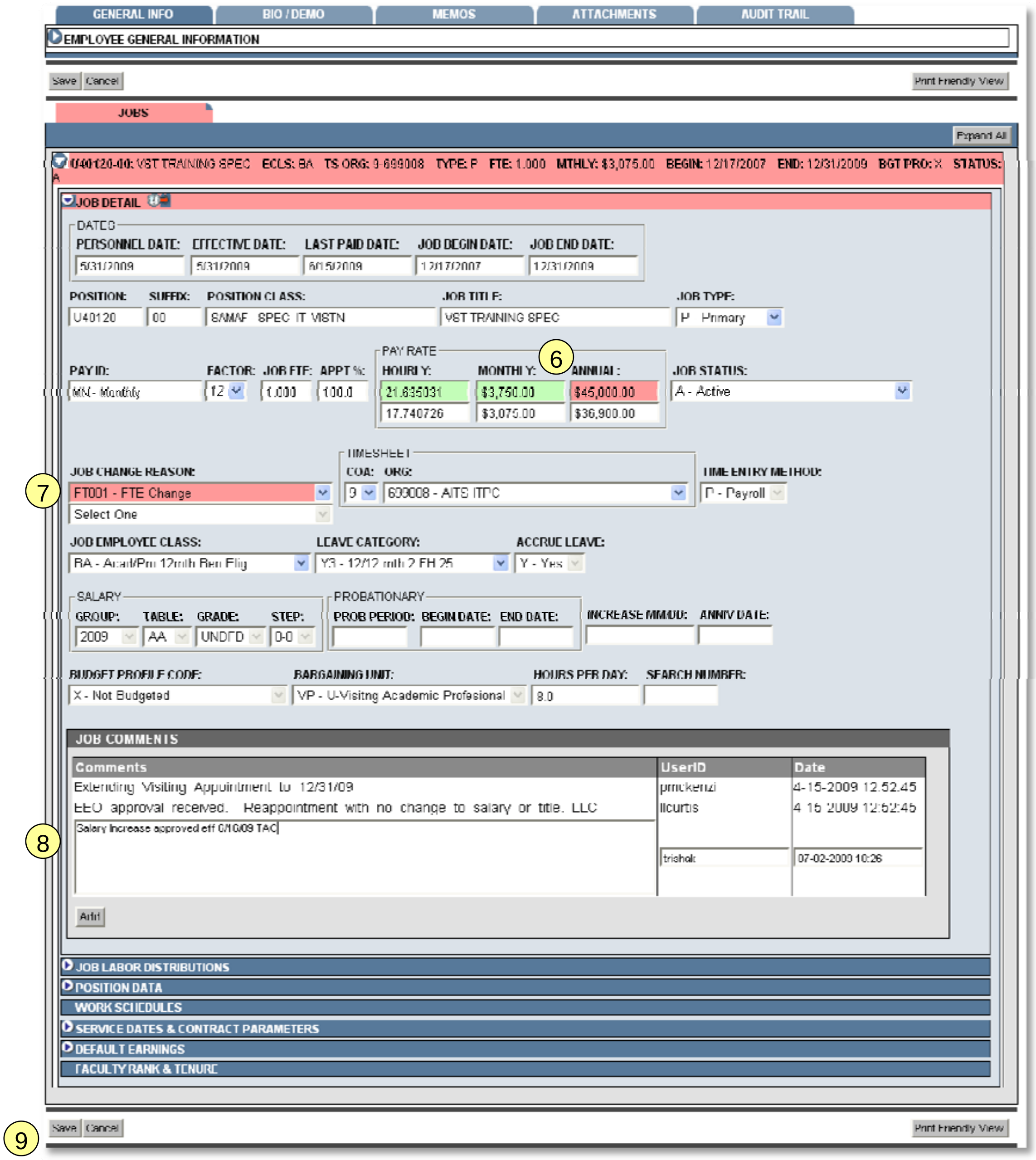


Figure 3: Changing Job Detail

Changing Position Data

1. Use the **Employee Search** to locate the employee and open the Employee Record View (ERV).

    The Employee Search screen is displayed.

2. Select the desired employee from the search results and click **Select**.

    The Employee Record View is displayed.

3. Enter the date the change should be effective in the **Date** field, and then click **View**.

    Screen refreshes and displays Employee Record View for the date selected.

4. From the **Transactions** menu, select **Employee Job Record Change**.

    Screen refreshes and transaction type is displayed on the Transaction Bar.

5. Expand the appropriate **Job Detail** Accordion.

    Job Data is displayed.

6. Expand the **Position Data** Accordion

    Position Data is displayed.

7. Edit the necessary fields. (For example **Position Class**, **Position Title** or **Budget Profile**) and press **Tab** after each entry.

    User implemented changes display in red. System Changes display in green.

8. In the **Job Detail** accordion, select a **Job Change Reason.**

    New *Job Change Reason is displayed in red.*

9. Enter **Job Comments** and click **Add**. (if necessary)

    Job Comments are saved.

10. Click **Save**.

    Changes are saved and are displayed under Proposed Changes accordion.

Routing the Transaction

To move the transaction to the next stop on the route path:

11. Click **Route**

    Any informational or error messages are displayed in the yellow message area in the Employee Record View. If transaction is routed successfully, message will display showing the routing destination.

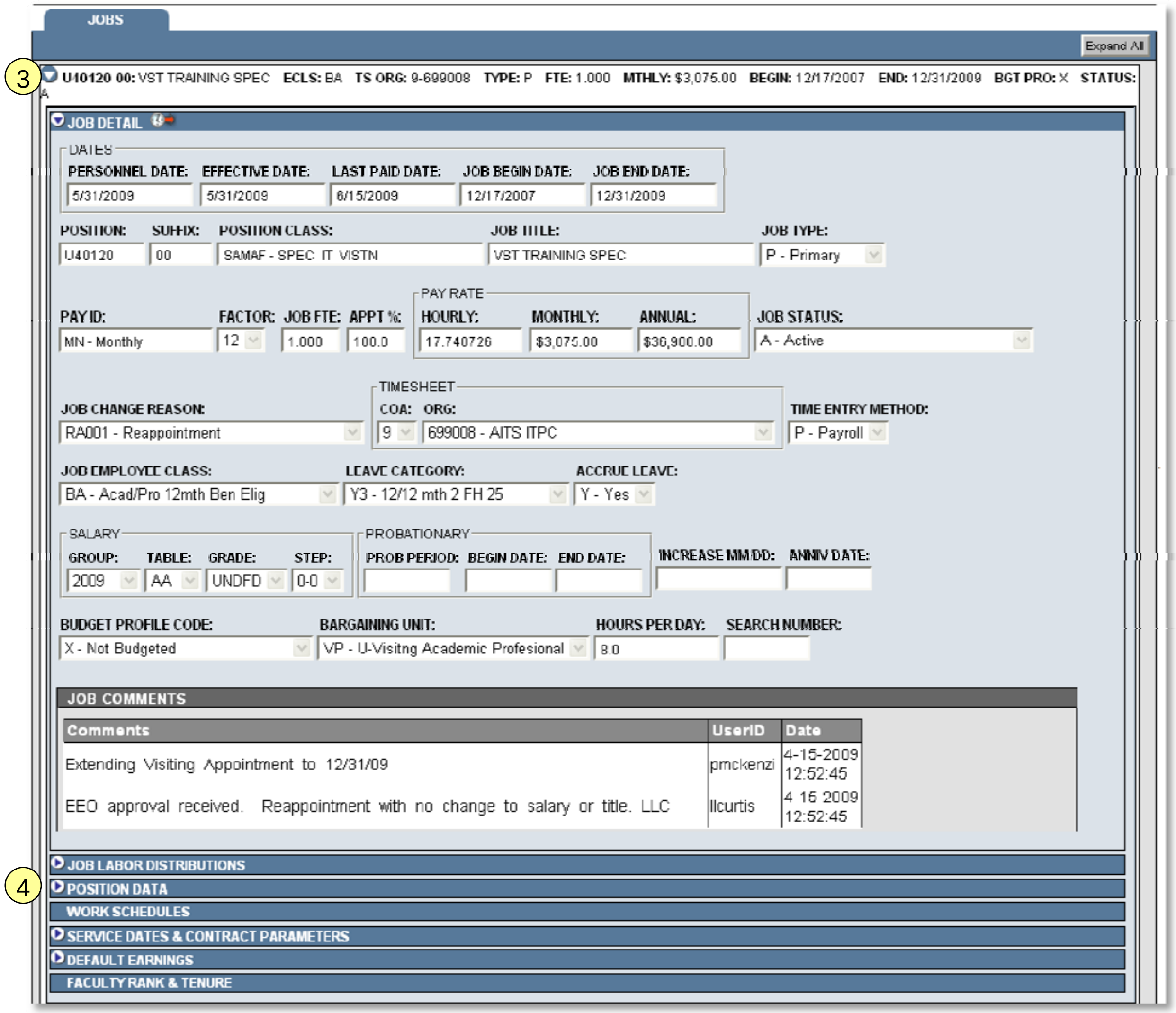


Figure 4: Employee Record View Accordions

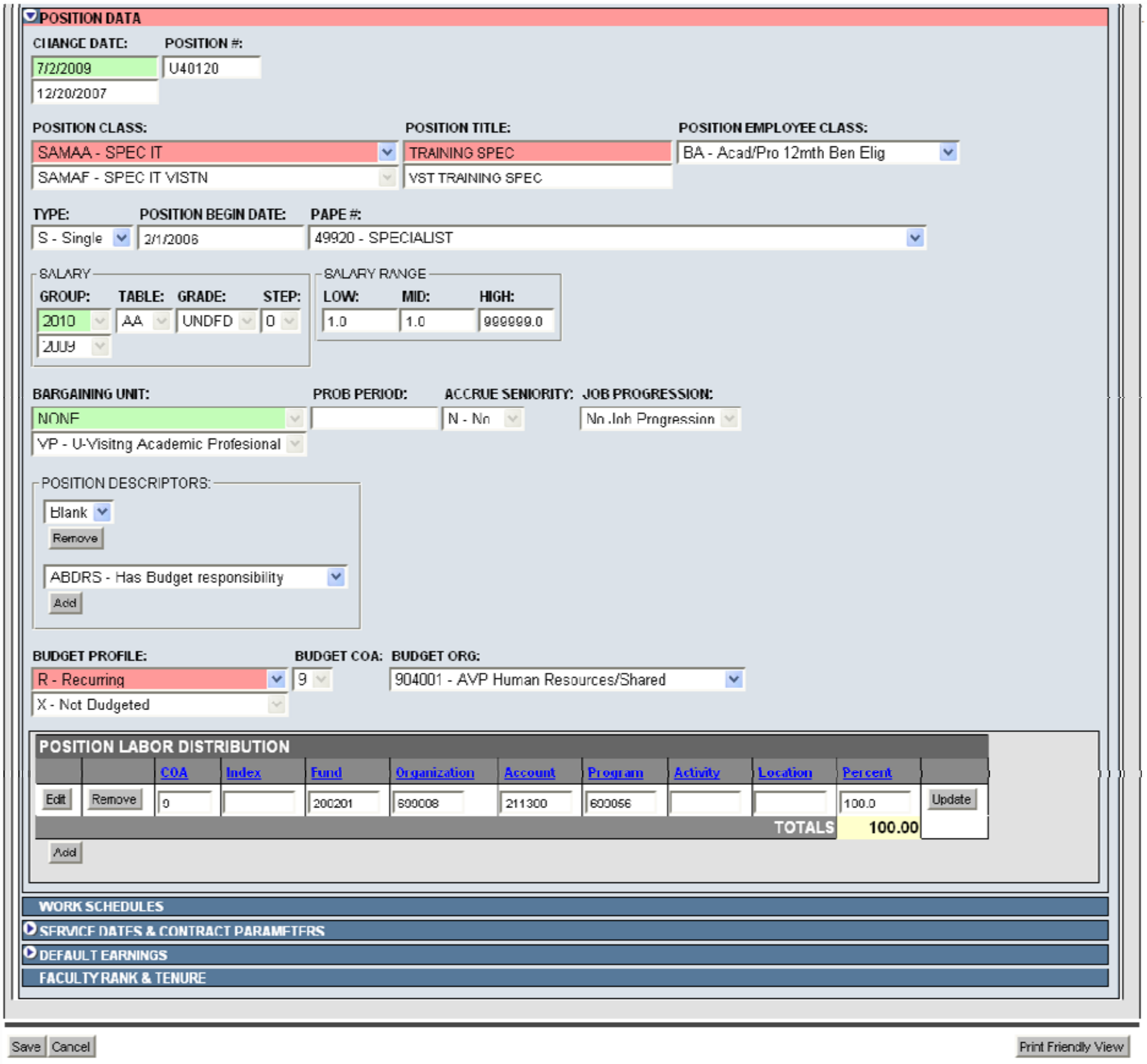


Figure 5: Changing Position Data

Changing Labor Distribution using Employee Job Record Change

Labor Distribution information can be changed using the Labor Distribution transaction or the Employee Job Record Change transaction. Reasons for using the Employee Job Record Change transaction type for Labor Distribution changes include:

- Needing to change job or position data, such as Salary or FTE, and Labor Distribution information in the same transaction.
- Needing to change the Personnel Date on a Labor Distribution Change to a date prior to the Last Paid Date.

1. Use the **Employee Search** to locate the employee and open the Employee Record View (ERV).

The Employee Search screen is displayed.

2. Select the desired employee from the search results and click **Select**.

The Employee Record View is displayed.

3. Enter the date in the View Date field for which this data should be effective and then click the **View** button.

Screen refreshes and ERV displays information for selected date.

4. From the **Transactions** menu, select **Employee Job Record Change**

Screen refreshes and transaction type is displayed on the Transaction Bar.

5. Expand the appropriate **Job Detail** accordion.

Current Job Detail is displayed.

6. Make any necessary changes to the **Job** or **Position Data**, and select a **Job Change Reason.**

User implemented changes display in Red. System Changes display in Green.

7. Expand the **Labor Distribution** accordion.

Current Labor Distribution data is displayed.

8. Click the **Edit** button to the left of the **Labor Distribution** row to be changed.

Labor Distribution fields are displayed in a vertical menu.

9. Edit the necessary **Labor Distribution** fields and click **Update** button below when finished.

User implemented changes display in Red. System Changes display in Green.

10. Click **Save**.

*Transaction is saved. Changes appear under **Proposed Changes**.*

NOTE: For more information about Labor Distribution Changes, see the Labor Distribution How-to Guide.

Routing the Transaction

To move the transaction to the next stop on the route path:

11. Click **Route**

Any informational or error messages are displayed in the yellow message area in the Employee Record View. If transaction is routed successfully, message will display showing the routing destination.

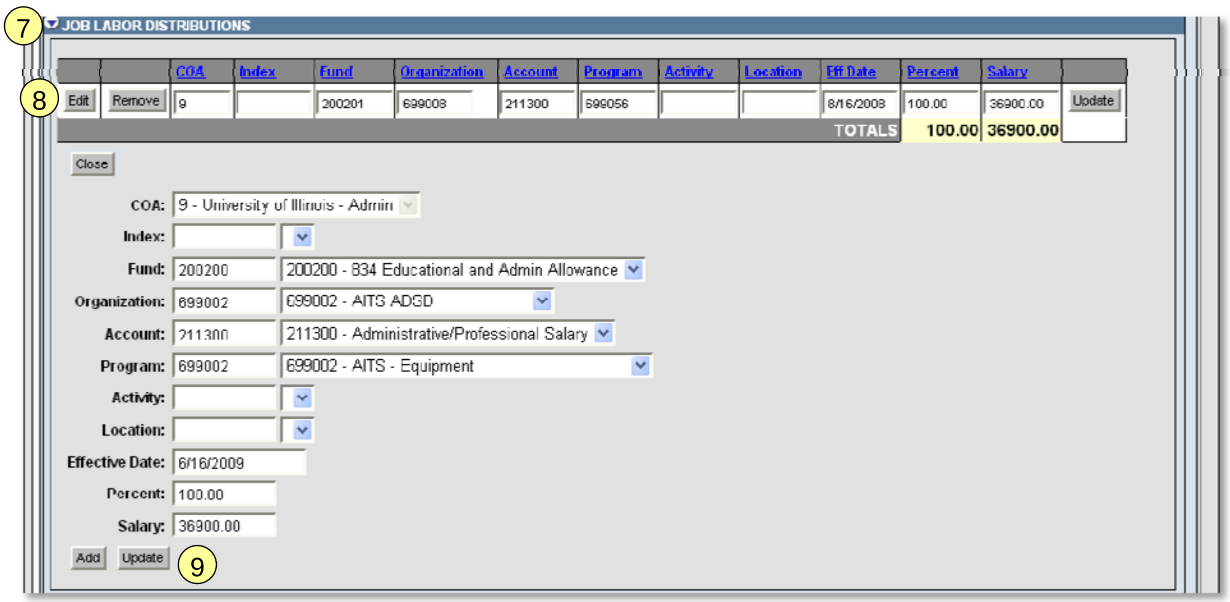


Figure 6: Editing Labor Distribution

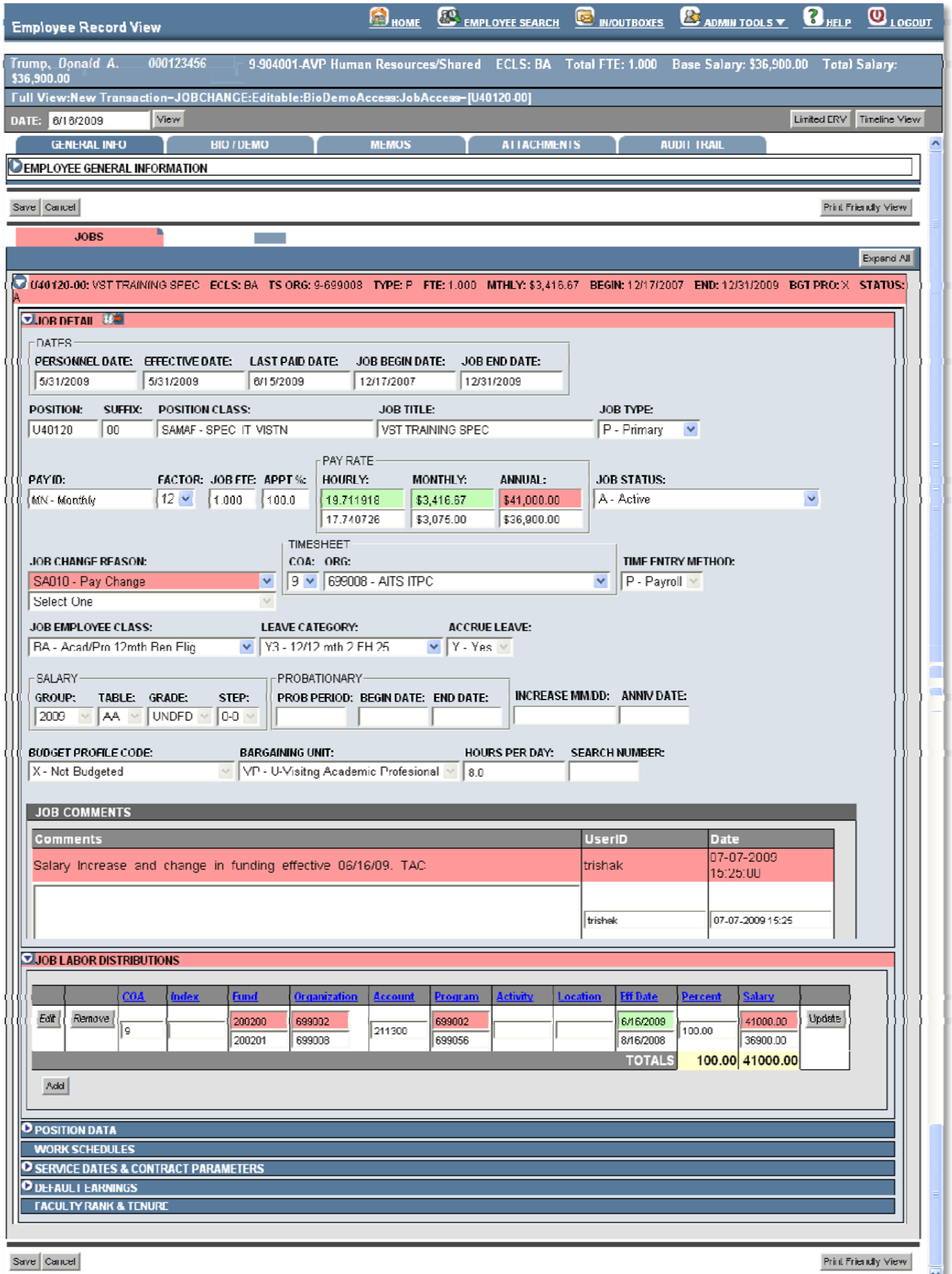


Figure 7: Salary Change with Labor Distribution Change

Accordions under the Jobs Tab

Work Schedules

Work Schedules are tied to jobs for which hours are reported via Time Entry. Only jobs that have CA, CB, CG, and CH e-classes may have an active Work Schedule. Work schedule changes (such as hours, shift, begin day) that take place after the Last Paid Date on the job record are made using a **Work Schedule** transaction in the HR Front End.

Adding a New Work Schedule

1. Use the **Employee Search** to locate the employee and open the Employee Record View (ERV).

   The Employee Search screen is displayed.

2. Select the desired employee from the search results and click **Select**.

   The Employee Record View is displayed.

3. Enter the date in the View Date field for which this data should be effective and then click the **View** button.

   Screen refreshes and displays the ERV for the selected date.

4. From the **Transactions** menu, select **Work Schedule**

   Screen refreshes and transaction type is displayed on the Transaction Bar. Only work schedules become editable.

5. Expand the appropriate **Job Detail** accordion.

   Current Job Detail is displayed.

6. Expand the **Work Schedule** accordion.

   Current Work Schedule is displayed.

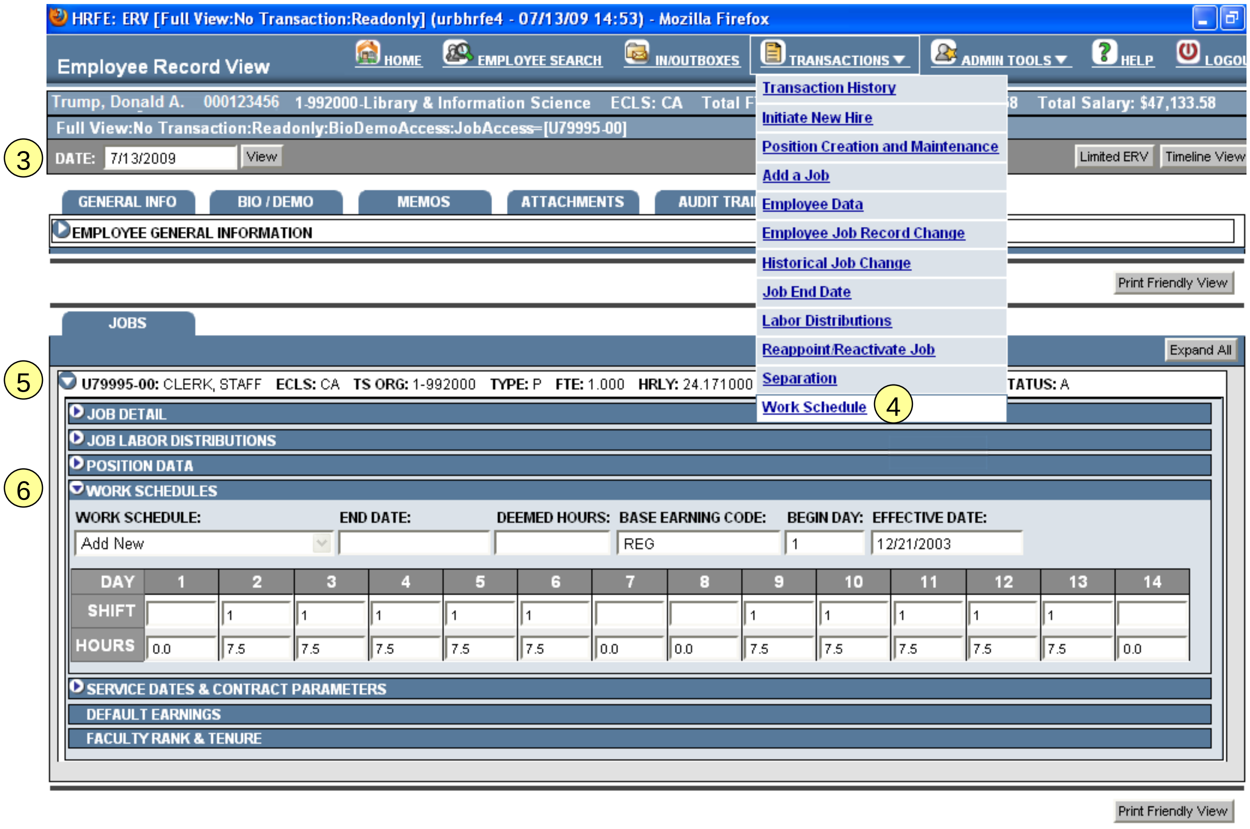


Figure 8: Work Schedule Transaction

7. Click **Add New**

   Work Schedule menu becomes editable.

8. Select the **new schedule** from the Work Schedule menu.

   System displays the new schedule with an effective date equal to the date selected in step three. Old schedule is displayed with an end date equal to the day prior to the effective date of the new schedule.

9. Make any necessary edits to the Work Schedule fields.

10. Click **Save**

Routing the Transaction

To move the transaction to the next stop on the route path:

11. Click **Route**

    Any informational or error messages are displayed in the yellow message area in the Employee Record View. If transaction is routed successfully, message will display showing the routing destination.

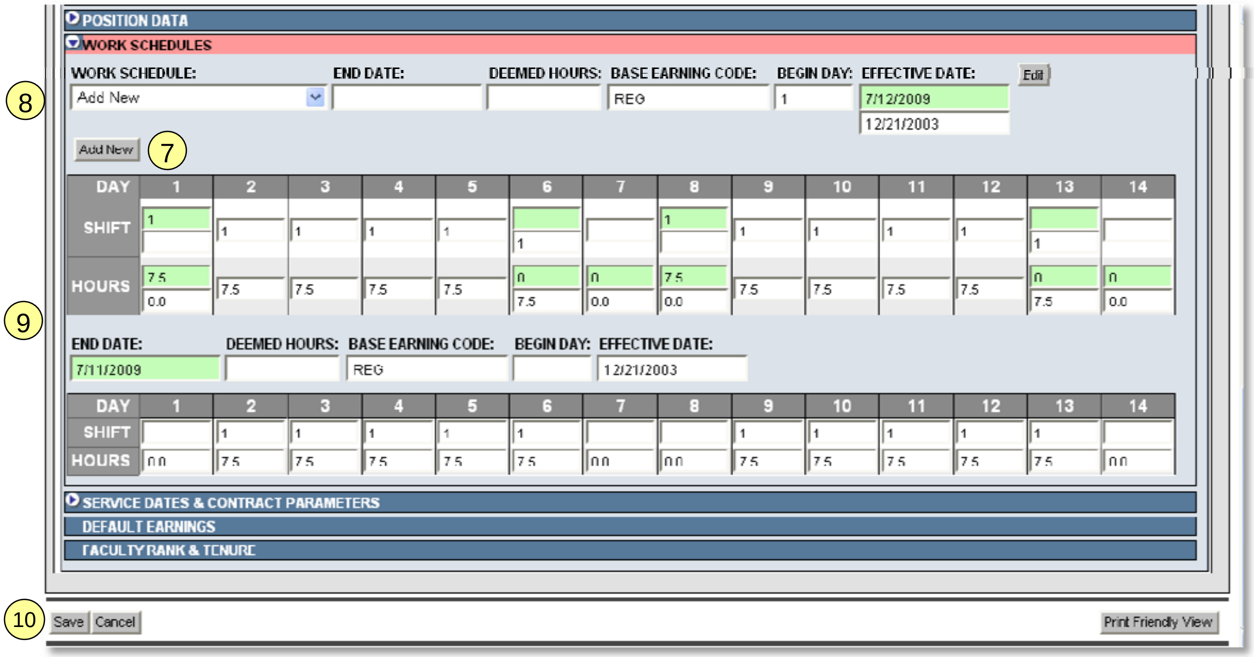


Figure 9: Adding a New Work Schedule

Service Dates and Contract Parameters Accordion

The **Service Dates and Contract Parameters** accordion displays the service dates and any contract parameters active on the selected date for the Employee Record.

NOTE: Only users with **Central HR** level can Edit and Apply Service Dates & Contract Parameters.

1. Take ownership of a transaction at the Apply level.

   Transaction becomes editable.

2. Expand the Service Dates and Contract Parameters accordion.

   Current Service Dates and Contract Parameters are displayed.

3. To edit the service dates, enter the correct dates in the S**ervice Begin Date** and **Service End Date** fields.

   New date values are displayed in red.

4. If Salary Commitment in changing, enter the new **Salary Commitment** information in the **Salary Commitment** field.

   New value is displayed in red.

5. To remove a Contract Parameters, select the parameter and click **Remove.**

   Contract Parameter is removed from list.

6. To add a new Contract Parameter, select the parameter and click **Add.**

   New Contract Parameter is displayed in red

7. Once the changes have been made to the Service Dates and Contract Parameters, click the **Apply** button to apply the changes.

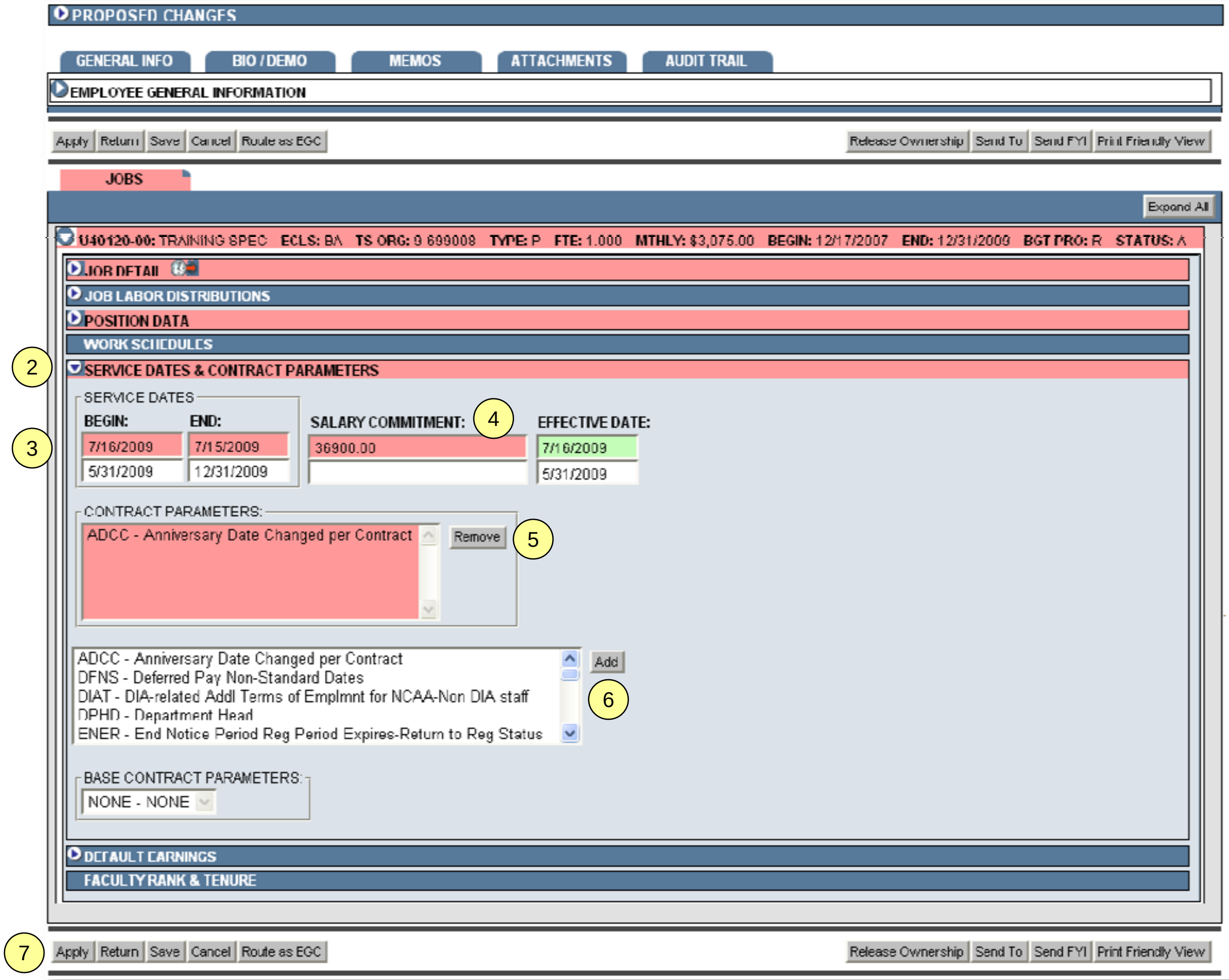


Figure 10: Service Dates and Contract Parameters

Faculty Rank and Tenure Accordion

All of the data in the Faculty Rank and Tenure accordion is read-only. This accordion is only accessible for jobs that have an Employee Class that begins with A. The View Date that is entered in Employee Record View will determine the appropriate data to be displayed in this accordion**.**

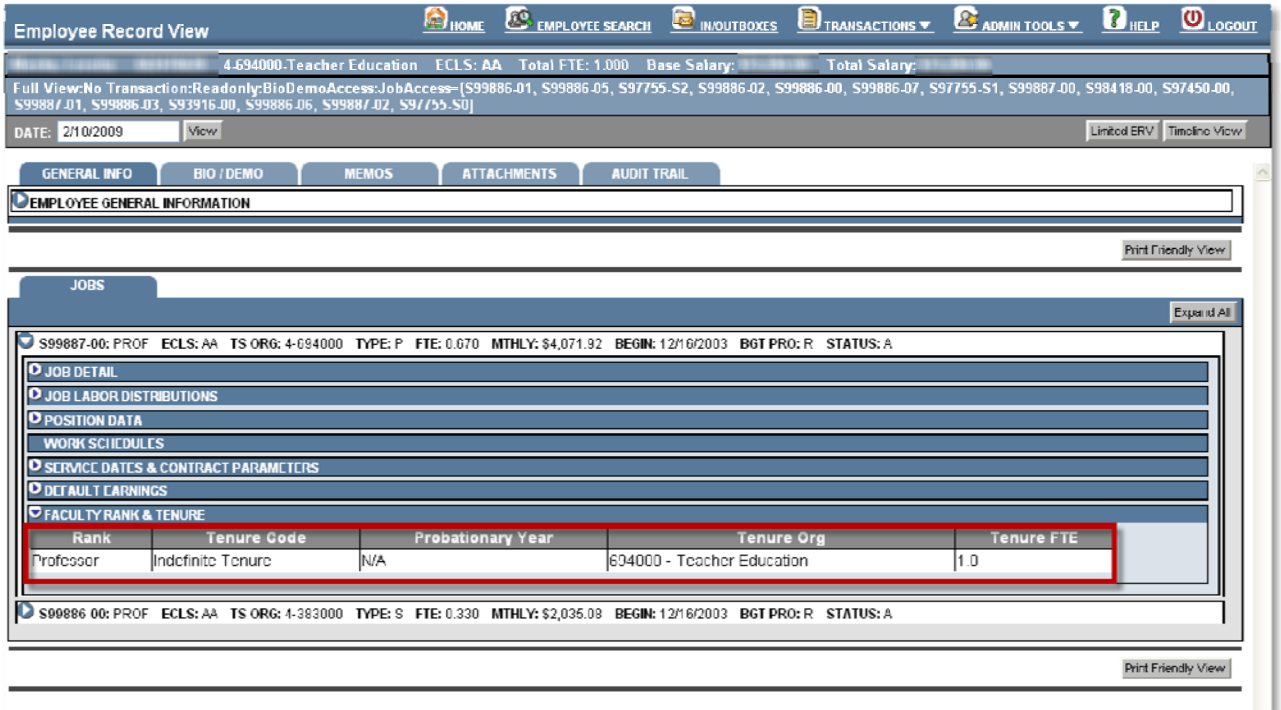


Figure 11: Faculty Rank and Tenure Accordion

Default Earnings Accordion

Users who have access to the Employee Record View (ERV) will be able to view the **Default Earnings** information. However, only those with HR Level security permissions will be able to update the fields. All the other users will have read-only access.

HINT: (**UIC Users**) Cell and auto allowances are added as default earnings and not as additional jobs for exempt employees.

NOTE: Users in the units and colleges will have read only access. Those with HR Level security will have read and write access.

Once the Default Earnings accordion becomes editable and the new effective date displays in green:

1. Select an **Earnings Code** from the list
2. Enter the Hours/Units
3. Enter the Special Rate (if applicable)
4. Click the **Add** button (changes should be retained as the screen refreshes)
5. Click the **Apply** button to apply the transaction.

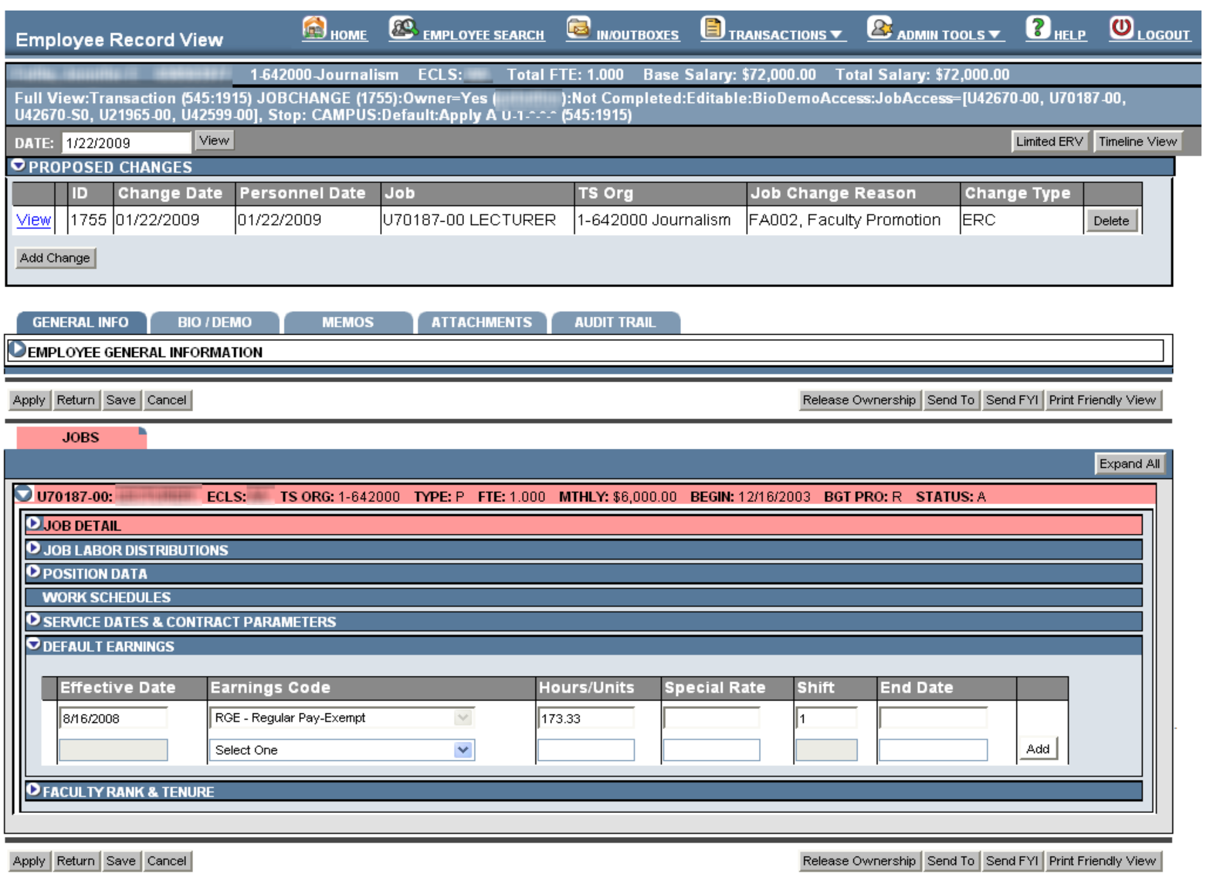
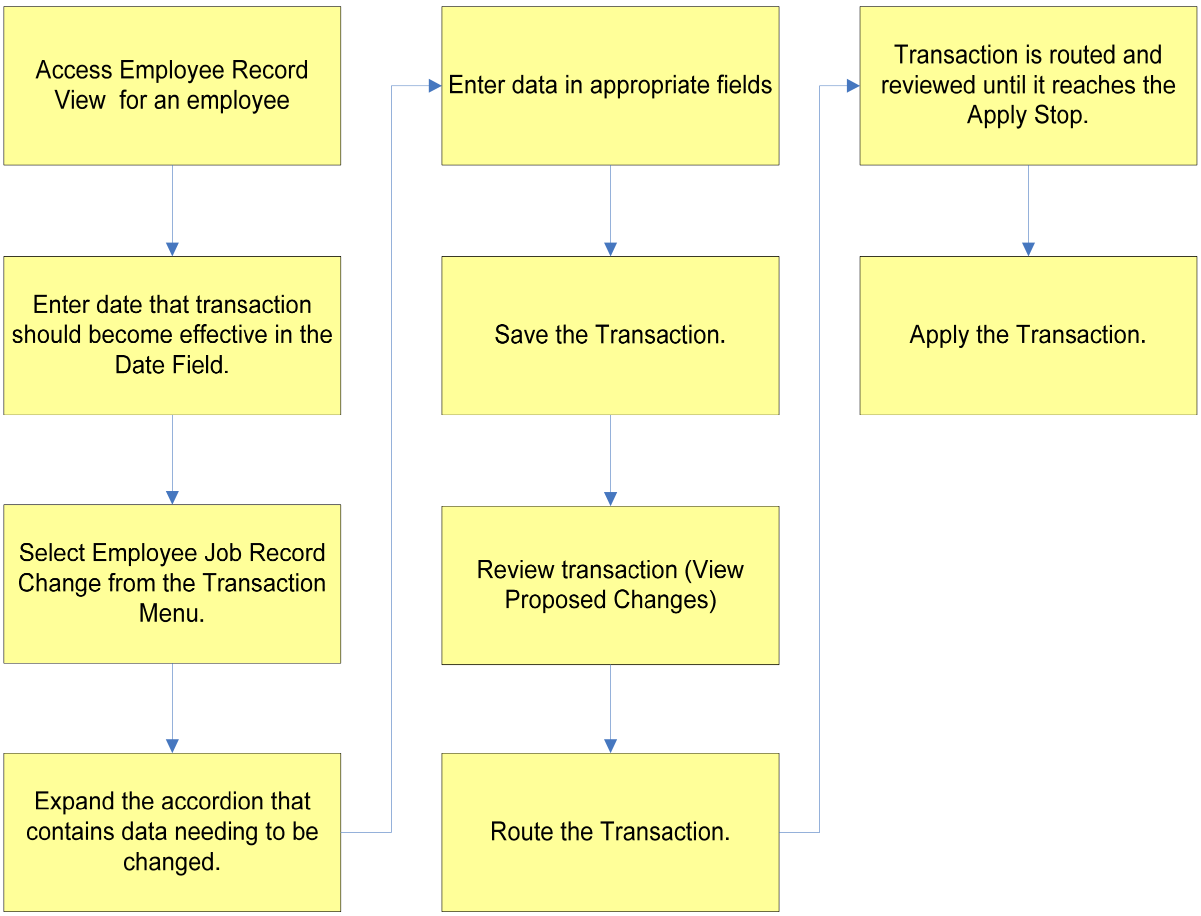


Figure 12: Default Earnings Accordion

Employee Job Record Change Process Flow

Below is the flow of the entire Employee Job Record Change process.



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