Employee Group/Class Change

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 Group/Class Change Quick View

1
- HR Front End determines that a transaction is an Employee Group / Class Change.

2
- Reviewer confirms that transaction is an Employee Group / Class Change.

3
- Campus HR determines if Compensible Leave or SURS eligibility is changing.

4
- If Eligibility is changing, Home Department waits for Final Regular Pay to process and determines if Payout is needed.

5
- If necessary, payout is processed outside HR Front End.

6
- Payroll verifies and processes payout. Enters Last Paid Information.

7
- Campus HR applies transaction to Banner.

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Introduction

An Employee Group / Class Change is a condition of another transaction when a change to the Employee Group and/or Class cause a potential change to the employee's benefits and/or pay.

When a transaction meets the criteria for an Employee Group / Class Change, the routing of the transaction is altered so that all effected workgroups will be notified of the changes and their potential effects on the employee's status.

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.

Also, it is assumed that a transaction has already been initiated and routed that will trigger the Employee Group / Class Change. For information on how to perform the transaction type(s) that lead up to the Employee Group / Class Change, see the corresponding training guide.

When Might an Employee Group/Class Change Occur?

An EGC/C Change **might** occur when:

- A new job is added to an active employee's record which triggers a change from the current Employee Group (E-Group) to a new E-Group on PEAMPL in Banner.
- The active employee's Employee Class (E-Class) triggers a change on the E-Class on PEAEMPL in Banner.
- The active academic employee's Total FTE changes from above .5 to below .5 or vice versa, which impacts benefits eligibility
- A job is ended (terminated) but the employee still has other active jobs remaining in E-Groups different from the terminated job

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 Group/Class Change

An Employee Group/Class Change occurs to a transaction at the final review stop (the last stop prior to the Apply Stop). The HR Front End will check the conditions of the transaction, and if the change meets the qualifications of the Employee Group/Class Change, an informational message is displayed when the transaction is routed.

Employee Group/Class Change Determination

1. When the Employee Group/Class Change message appears, click **Continue with EGC/ECC.**

Transaction is routed according to the predetermined EGC/ECC routing.

NOTE: If the transaction should not follow the Employee Group/Class Change routing, click **Continue without EGC/ECC**. Transaction will continue on its current route.

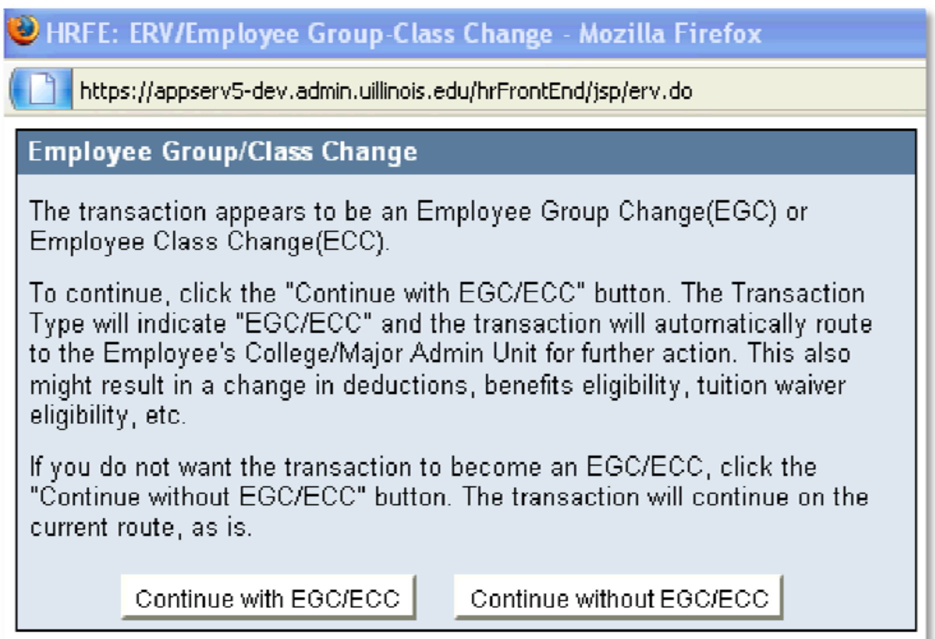

Figure 1: Employee Group/Class Change message

Employee Group / Class Change Payout Data Activation

The next step in an Employee Group / Class Change is for the Campus HR Applier to determine if the changes proposed in the transaction will result in a change in eligibility for Compensable Leave and/or SURS.

1. Take ownership of the transaction from the **Group Inbox** or from the **Employee Record View**.
2. Select **Yes** or **No** to the Employee Group / Class Change Payout Data Activation question.
3. Click **Apply**.

   Transaction is applied to Banner.

   - If **yes** was select to Payout Data Activation, post-apply routing is added.
   - If **no** was select to Payout Data Activation, transaction is complete.

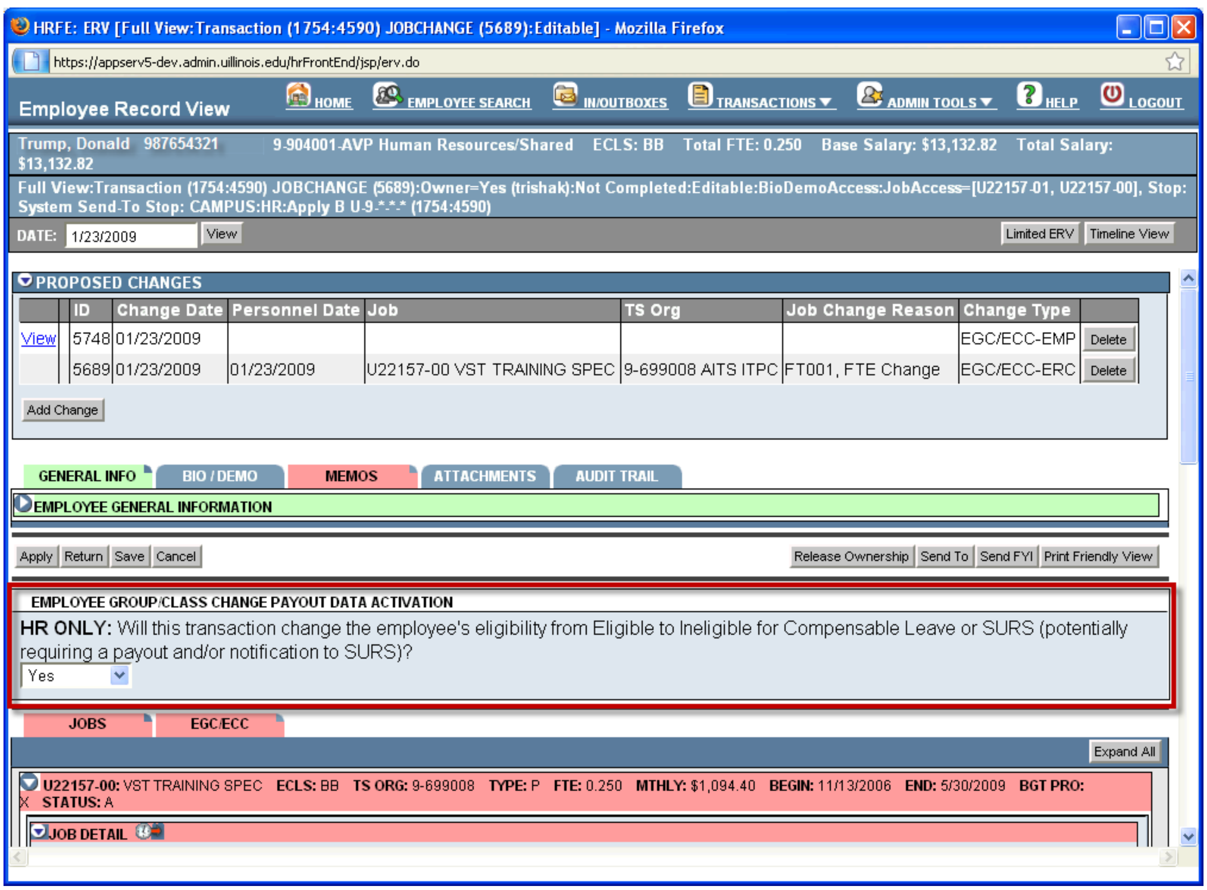

Figure 2: Employee Group/Class Change Payout Data Activation

Post-Apply Process / Payout Process

If yes is selected for the Payout Data Activation question, the transaction will be applied to Banner, then the post-apply routing will send the transaction to the Home Department's Group Inbox. While the HR Front End assists in calculating a potential payout, the actual payout is performed outside the HR Front End System in PZAADJT.

1. After the Final Regular Pay is processed, check PEALEAV balances in Banner to determine if a payout will be required.
2. Take ownership of the transaction in the HR Front End and open the Employee Record View.
3. Click the **EGC/ECC** tab.

   Employee Group / Class Change Data screen appears.
4. Enter the **Eligibility End Date** (mm/dd/yyyy).

NOTE: The Eligibility End Date is the date that the employee's Compensable Leave and/or SURS eligibility changed to ineligible.

5. Select **Yes** or **No** for the **Payout Required** field.
   - o If **No** is selected, click the **Route** button.

     Transaction is routed.
   - o If **Yes** is selected, Payout Screen appears

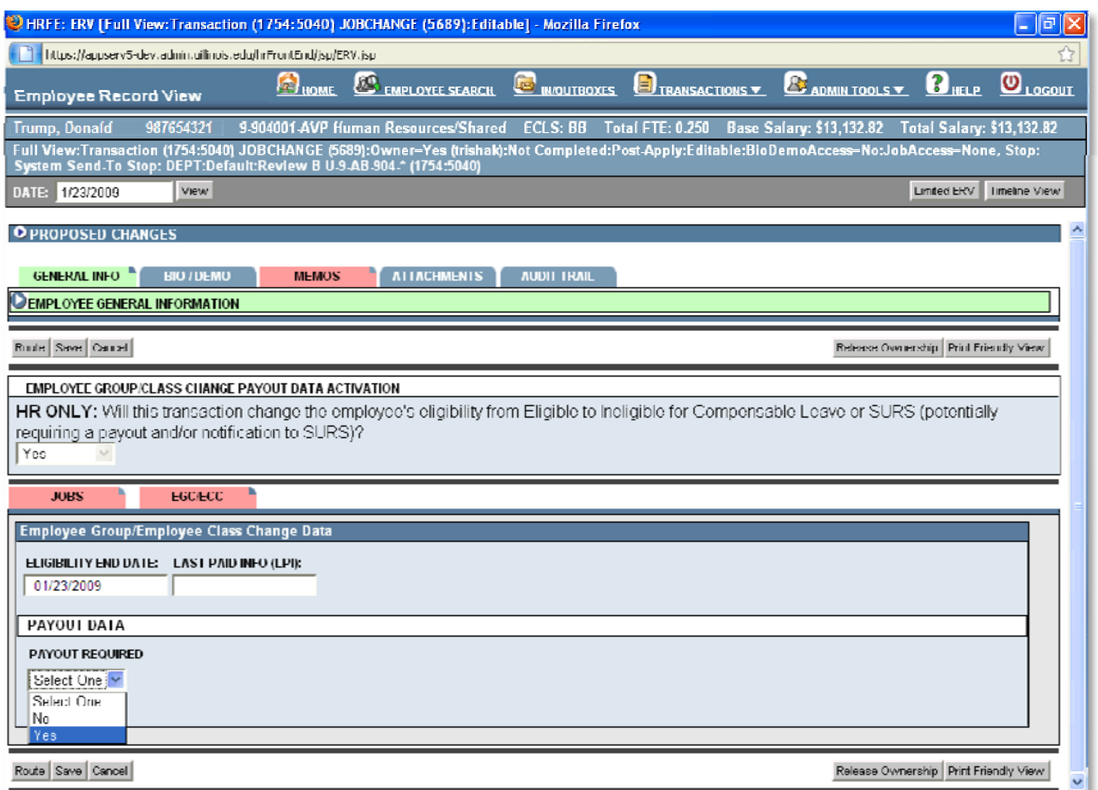

Figure 3: Employee Group/Class Change tab

Employee Group / Class Change Payout Screen

If Yes was selected to the **Payout Required** question, the Employee Group / Class Change Payout Screen will appear. This screen assists users in determining a potential payout, as well as allowing a place to send comments to Payroll explaining how the payout amounts were calculated.

1. Complete the necessary sections of the Payout Screen:

   a. **Determination of Weighted Rate** - If a job is not required for the determination for Weighted Rate, click the check-box to de-select the job. If a **Manual Override** is needed for the Hourly Rate, enter the amount in the **Manual Override** field.

   b. **Listing of 0%** Jobs - Check the **Listing of 0% Jobs** to determine if a Manual Override is needed.

   c. **EGC/ECC Memos** - Enter an explanation of any overrides used for Payroll to view, then click **Add**.

   d. **Determination of Payout -** If employee is waiving any of their Payable Sick time for SURS, enter the Sick to Waive hours in the Determination of Payout section.

   e. **Information to be Used to Enter Payout Adjustable in Banner** - Read-only section used as a guideline for entering the actual adjustment.

2. Enter the actual payout information in the PZAADJT form in Banner.

3. Click **Route** to route the transaction.

   Transaction is routed for review.

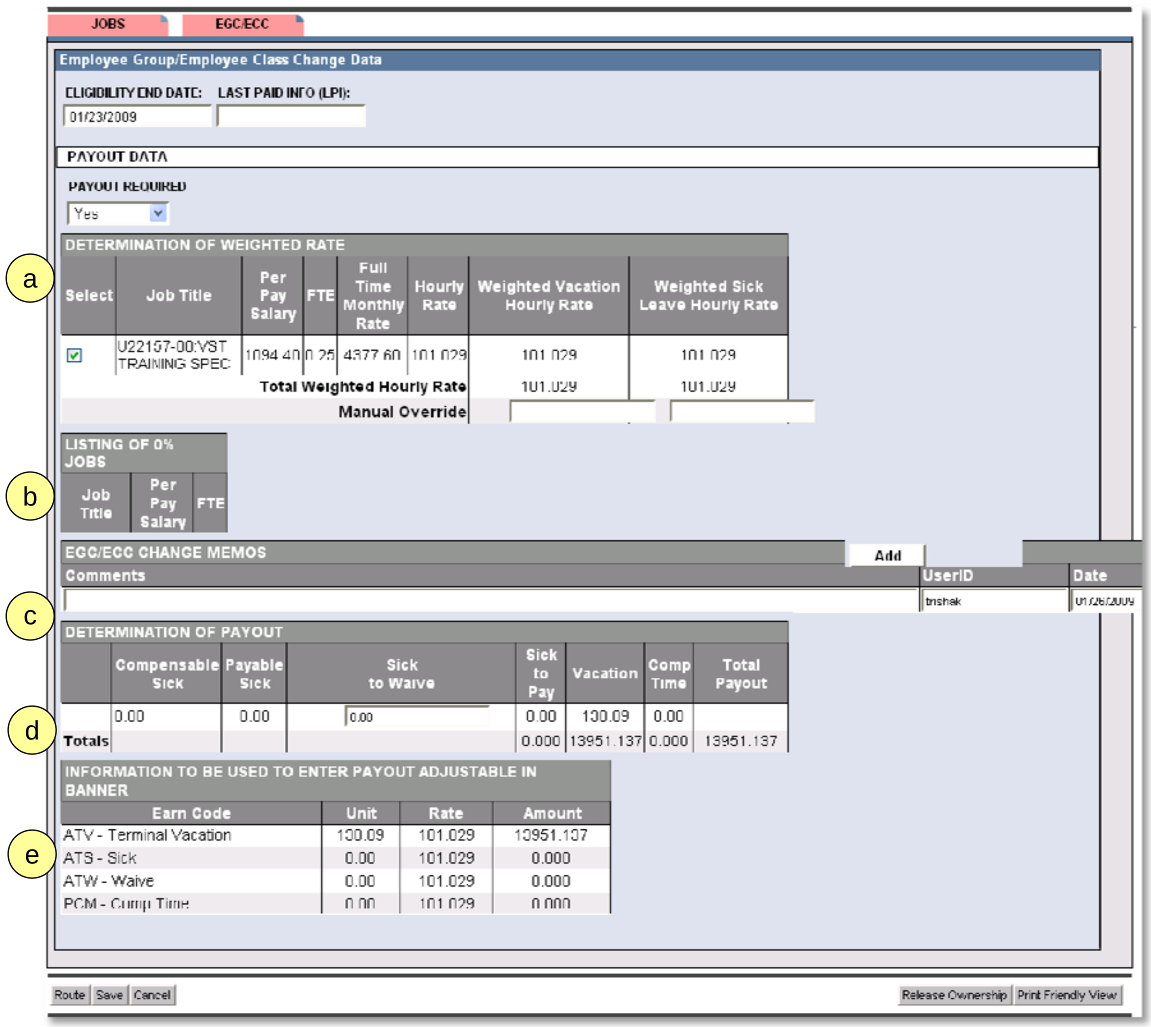

Figure 4: Employee Group/Class Change Payout Screen

Payroll Offices Processes

The Employee Group / Class Change transaction will be routed to the Payroll Office prior to the final apply stop. The Payroll office will use the information in the Payout Screen to verify the payout adjustment. Once the Payout is processed, the Payroll Office will enter the Last Paid Information in the HR Front End, and route the transaction back to the Central HR office.

1. Take ownership of the transaction and open the Employee Record View.

2. Verify that the Payout Adjustment is correct using the data on the Employee Group / Class Change Payout Screen.

3. After the Payout is complete, enter the date of the Last Pay in the **Last Paid Info (LPI)** field.

4. Click **Route**.

Transaction is routed to central HR for final apply.

Central HR Office Process

After Payroll enters the Last Paid Information, the transaction is routed back the Campus HR Office to be applied to Banner.

1. Take ownership of the transaction and open the Employee Record View.
2. Review the transaction.
3. Click **Apply**.

   Transaction is successfully applied to Banner.

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