Historical Job Change

Human Resources Front End

How-To Guide

HR Front End Training Team

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Revision Information

Guide ID: Historical Job Change

Revision Date: June 19, 2009

Version: 1.2

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 Historical Job Change Quick View

1	• Locate the employee's record and initiate a Historical Job Change transaction.
2	• Complete the Job Selection screen.
3	• Complete the Change Date & Comment screen.
4	• Review the Employee Record View.
5	• Transaction is routed and applied to Banner.

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Introduction

This guide will help you understand and process Historical Job Changes in the HR Front End. It includes an explanation of Historical Job Changes and gives general guidelines about when it is appropriate to use the Historical Job Change transaction type. It also provides instructions on how to complete Historical Job Change transactions.

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.

Before processing a Historical Job Change transaction, ensure that prior approvals have been obtained where applicable.

What is a Historical Job Change?

Historical Job Change transactions in the HR Front End are used to correct the Personnel Date on job records. Two conditions must *both* be met to use a Historical Job Change on a record:

- The job record is dated on or before the Last Paid Date.
- All information on the job record is correct except for the date.

When both of these apply to a job record, use a Historical Job Change to edit the Personnel Date on the job record. The HR Front End contains a wizard to lead you through the screens involved in a Historical Job Change. Since Historical Job Changes are processed on a job record after pay has been calculated, a pay adjustment outside of the HR Front End is often required, as well.

It is possible to complete multiple historical changes for an employee on a single transaction. You will need to add a component for each historical change needed. For each Historical Job Change component added, you will be taken through the wizard to complete the component.

If you need to change any information on a job record other then the Personnel Date, use an Employee Job Record Change. You should also use an Employee Record Change to correct the Personnel Date on a job record dated after the Last Paid Date. Historical Job Change cannot be used on a record with an Effective Date equal to the Job Begin Date. If the Job Begin Date in the system should have been earlier, a new job needs to be created.

For example, the job labor distribution for an employee is supposed to change on 08/01/08. When entering the record to change the labor distribution a date of 10/16/08 is used instead. The employee is paid before the date discrepancy is discovered. Use a Historical Job Change to change the Personnel Date of the labor distribution change from 10/16/08 to 08/01/08.

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.	

# *Making a Historical Job Change*

A Historical Job Change is used **only** to correct the Personnel Date on an existing job record after pay has already been issued. If the job change should have taken effect before the Last Paid Date on the record but the change was never entered, use an Employee Job Record Change. Instructions for adding a job record that is dated before the Last Paid Date are found in the Employee Job Record Change How-To Guide.

Initiating a Historical Job Change

To begin a Historical Job Change, you must first open the employee's record.

1. Click **Employee Search** in the navigation bar at the top of the screen.

> *The **Employee Search** screen appears.*
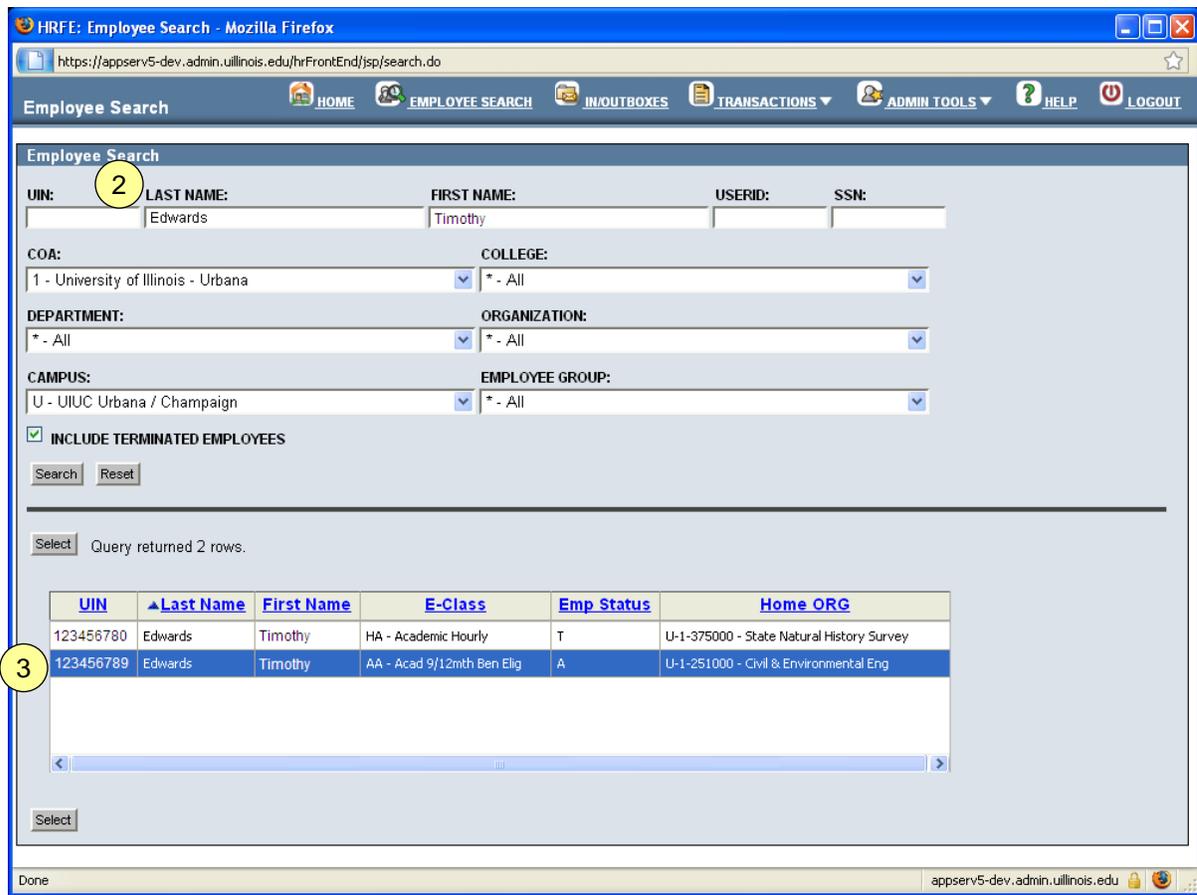
Figure 1: Completed Employee Search screen

2. Type or select the search criteria in the available fields and click **Search**.

> *The search results appear in a table in the area below the solid black line.*

3. Highlight the desired employee in the results list and click **Select**.

> *The **Employee Record View** for the selected employee appears.*
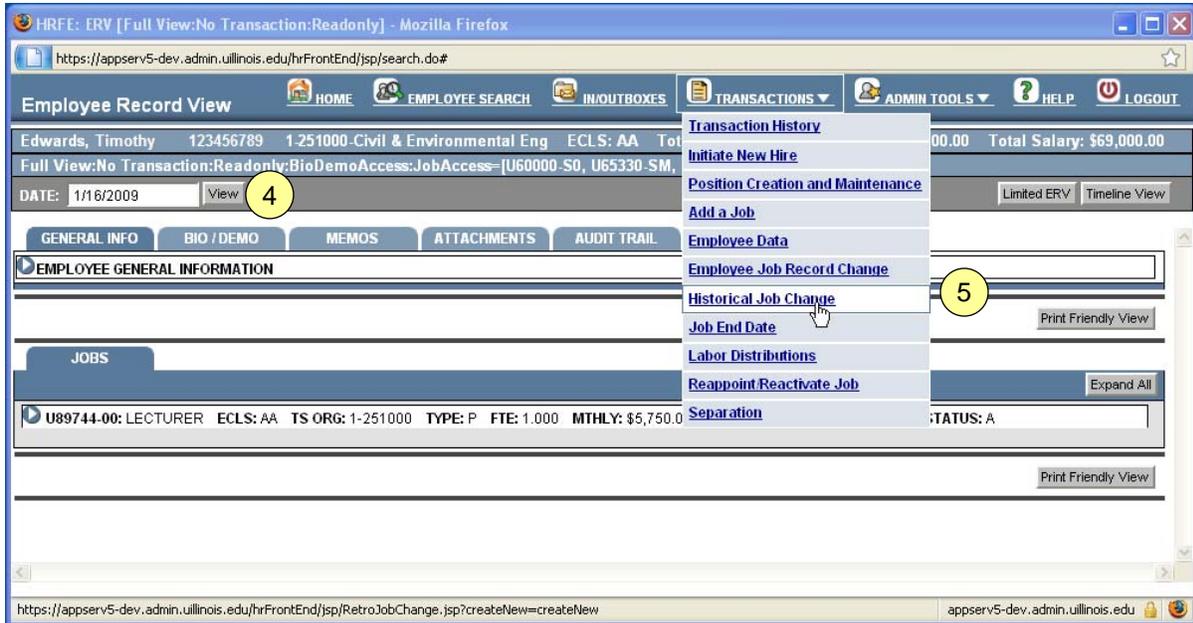
Figure 2: Employee Record View

4. If desired, type a different date in the **View Date** and click **View**. You can make changes only to jobs that exist as of the **View Date**, so choose a date accordingly.

   *The **Employee Record View** refreshes as of the date typed into the **View Date** field.*

   > **HINT**: If you are not sure what date to use for the **View Date** you may want to click **Timeline View**. You can find the appropriate date here for the job you want to change and then click **ERV** to return to the **Employee Record View** and begin the transaction.

5. From the **Transactions** menu, select **Historical Job Change**.

   *The **Job Selection** screen of the **Historical Job Change Wizard** appears.*

Selecting the Job

On the **Job Selection** screen of the wizard, you choose the specific job record that needs to be corrected. Selecting this record is a two-part process.
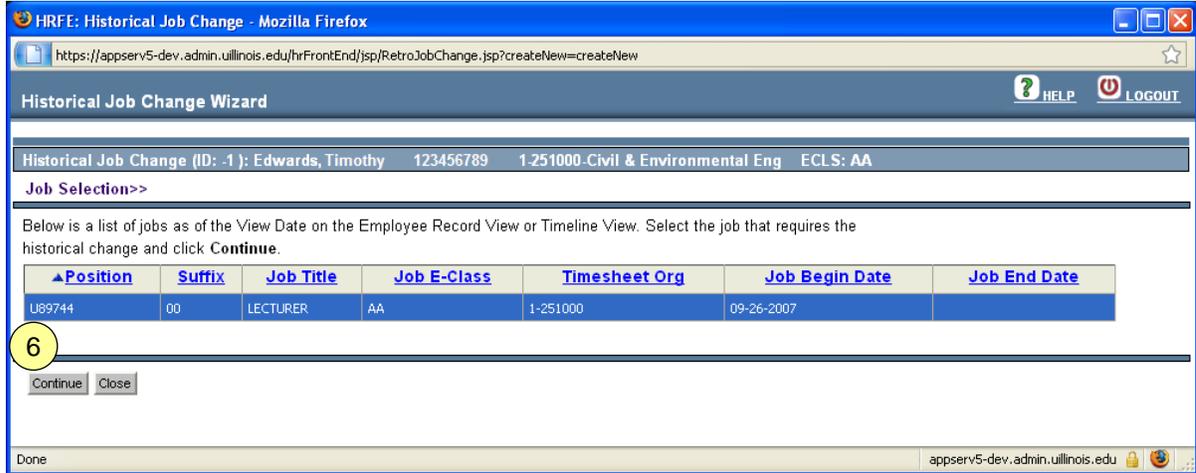

Figure 3: Initial Job Selection screen

6. Highlight the job that requires the change and click **Continue**.

> **NOTE**: The only jobs that appear in the **Job Selection** screen are:
> - Jobs for which you have security access.
> - Jobs as of the **View Date** specified in the **Employee Record View**.

A table of effective-dated job records associated with the selected job appears below the list of jobs.
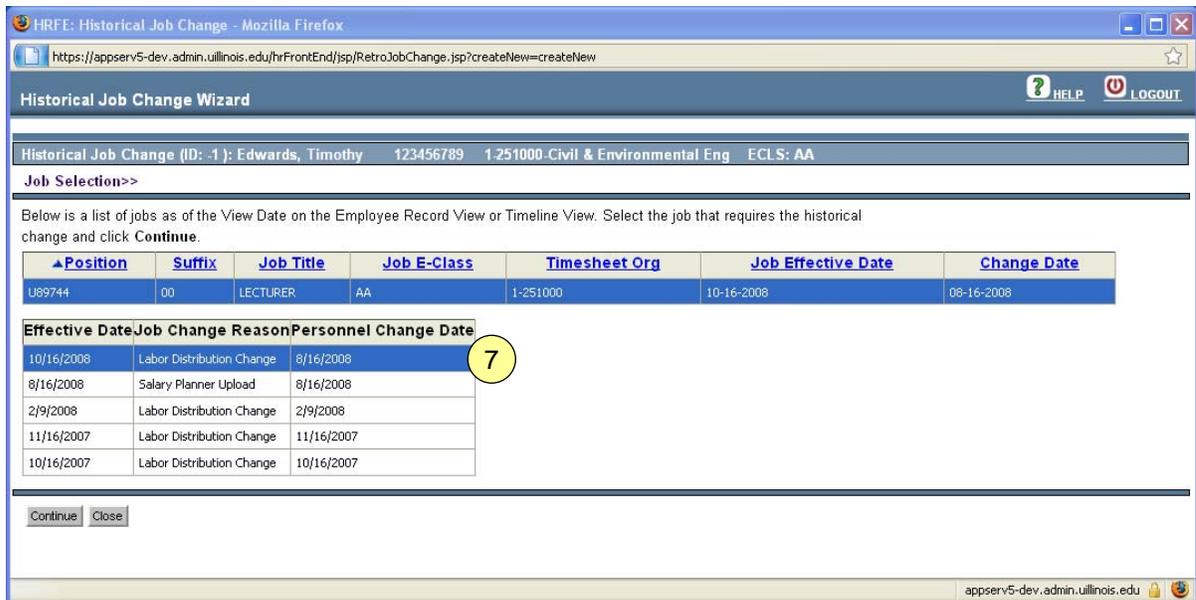
Figure 4: Job Selection screen after a job is selected

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7. Highlight the effective-dated record that requires a change to the **Personnel Date** and click **Continue**.

*The **Change Date & Comment** screen appears (see Figure 5 below). The **Original Effective Date** and the **Original Change Date** default from the job record selected and are not editable.*

> **HINT**: If the employee has multiple jobs and you realize that you have selected the wrong job, you can still select the correct job without leaving the **Job Selection** screen. Simply click the correct job in the jobs list at the top of the screen. Then click **Continue** again.

Entering the Change Date & Comments

In the **Change Date & Comment** screen of the wizard, you add the correct **Personnel Date**.

Figure 5: Completed Change Date & Comment screen

8. Type the corrected date in the **New Personnel Date** field.

> **NOTE**: The **New Personnel Date** must be on or before the **Original Effective Date**.

9. Type notes explaining the new date in the **Comments** field.

10. Click **Continue**.

*The **Employee Record View** appears as of the **New Personnel Date**.*

Completing the Historical Job Change

After the last screen of the wizard is completed, the **Employee Record View** displays the state of the employee as of the **New Personnel Date** entered into the wizard.

Figure 6: Employee Record View after Historical Job Change Wizard

> **NOTE**: The *Proposed Changes* accordion at the top of the *Employee Record View* summarizes all changes proposed on this transaction. The **Change Date** and **Personnel Date** for the Historical Job Change (noted by '*HJC*' in the **Change Type** column) are the same as the **New Personnel Date** typed into the wizard.

11. If there are multiple components for the transactions, click the **View** link to the left of the Historical Job Change component.

*The **Employee Record View** refreshes as of the **Change Date** for the component.*

12. Under the **Jobs** *tab, c*lick the accordion bar for the changed job to expand and review the *Job Detail*.

*The **Job Detail** accordion for the job is expanded.*

Figure 7: Job Detail in Employee Record View

13. If you need to make corrections to the information entered into the **Historical Job Change Wizard**, click the **Wizard** link to the left of the component in the *Proposed Changes*.

*The initial screen of the Historical Job Change wizard (the **Job Selection** screen) appears.*

NOTE: When the returning to the wizard, you must continue through all successive screens of the wizard in order for the system to properly validate data.

14. Click **Add Change** to add a component if another Historical Job Change (or other change type) is needed.

**15.** Add transaction memos in the *Memos* tab and attach supporting documents in the *Attachments* tab, if applicable.

NOTE: More information on how to complete steps 14 and 15 is available in the Additional Elements section.

The transaction is now ready to be routed and applied to Banner.

Remember that you may also need to process a pay adjustment outside of the HR Front End to correct pay the employee has already received.

Appendix A: Historical Job Change Process Flow

Historical Job Change transactions in the HR Front End are processed with the help of a wizard. Below is the flow for the Historical Job Change process, including steps before, during, and after the wizard.

Access Timeline View or Employee Record View and review job record that requires change	System lists effective-dated job records associated with selected job	System takes user to full ERV
Select Historical Job Change from Transactions menu	Choose one of the effective-dated records and click Continue	Transaction Routed
Wizard appears providing a list of eligible jobs	System displays Change Date & Comments screen	Transaction Reviewed
Select job that requires changes and click Continue.	Enter Change Date and Comment. Click Continue	Transaction Applied

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