

Personnel Actions & HR Enhancements

Outline

- Personnel actions explanation and review
 - o Reasons Maintenance
 - o Walk through adding a record
 - o Setting up approvals
 - o Walk through approval and update process
 - o Show how it updates the employee profile
- HR Enhancements
 - o Employee Maintenance - Deduction Start/End Dates
 - o Create Standard Time Entries
 - o Time Entry Maintenance
 - o Timesheets
 - o Attendance Codes

Personnel actions

Personnel Reason Maintenance

Go to H/R>Personnel Actions>Personnel Reason Maintenance

Users may define their own personnel action reasons and select them from a picklist on Personnel Action Maintenance

Personnel Reason Maintenance	
<input type="button" value="Add"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/> <input type="button" value="Print"/> <input type="button" value="Help"/>	
Reason	
INS	Promotion

Personnel Actions Form Enhancements

The following enhancements have been added to Personnel Action forms:
 Attachments carryover to Employee Maintenance
 Added view-only leave balances tab on Personnel Action Maintenance

Personnel Action Maintenance

Employee Id: ABB01 Seq: 1 Status: Pending
 First Name: CHRISTINA Middle Init: A Last Name: ABBOTT
 Hire Date: 07/10/2015 Current Position Start Date: / / Birth Date: 08/05/1996
 Reason: Home Ph: () -

Current Change To

General	Other Compensation	Notes	Hrs						
Last Used				Carryover	YTD Accrued	YTD Used	Available	Max Allowed	Hrs Per Pay
Sick:	/ /			100.00	30.00	.00	130.00	.00	.00
Vacation:	/ /			150.00	40.00	.00	190.00	.00	.00
Admin:	/ /			.00	.00	.00	.00	.00	.00
Comp:	/ /			.00	.00	.00	.00	.00	.00
Other:	/ /			.00	.00	.00	.00	.00	.00
Holiday:	/ /			.00	.00	.00	.00	.00	.00

Note: This tab reflects time up to and including 12/31/18.

Added Other Compensation tab to Personnel Action Maintenance

The screenshot shows the 'Personnel Action Maintenance' window. The 'Other Compensation' tab is selected, and a red arrow points to the 'Add Other Comp' button. The form displays employee information for Christina Abbott, including her ID (ABB01), hire date (07/10/2015), and current position start date. The 'Reason' field is set to 'Promotion'. The 'Other Compensation' section includes fields for 'Other Comp Id', 'Description', 'Included In' (set to 'Total Salary'), and 'Annual Amount'.

Added Longevity salary fields to Personnel Action Maintenance

The screenshot shows the 'Personnel Action Maintenance' window with the 'Salary/Rates' section expanded. A red arrow points to the 'Longevity Salary' field. The section includes fields for 'Longevity Id', 'Class Id', 'Step', 'Grade', 'Base Salary', 'Longevity Salary', 'Include Longevity in Pension', 'Other Comp', 'Pension Other Comp', 'Reg. Rate', and 'O/T Rate 1/2/3'. The 'Longevity Salary' field is currently set to .00. The 'Include Longevity in Pension' checkbox is checked. The 'Reg. Rate' is set to 8.0000. The 'O/T Rate 1/2/3' fields are set to .0000. The 'Spd Rate 1/2' fields are set to .0000.

How to Set up Approvals for Personal Action Forms

Go to system utilities > Personal Parameter Maintenance > HR tab > PAF

This is where you can choose all of the different levels of approvals needed such as HR Director as well as the choice of department head and/or Supervisor approval if needed

Personnel Parameter Maintenance

System or Personnel Module must be locked to edit the fields displayed in red.

General Payroll HR

General PAF

Supervisor Approval Needed

Department Head Approval Needed

	Title	User Id
<input checked="" type="checkbox"/> Approval Needed	HR DIRECTOR	SU
<input type="checkbox"/> Approval Needed		
<input type="checkbox"/> Approval Needed		

If department Head approval is needed then Department head field must be filled out in department maintenance. Click the edit button along the top and add the department heads ID to the field as seen below.

Go to Personal > Maintenance > Department Maintenance

Personnel Department Maintenance

+ Add Save Cancel Delete Previous Next Help

Dept Id: CCG - Description: CLEAN COMMUNITIES GRANT Global Edit

General Employer Liabilities

Budget Dist. Reg: G-02-8C-855-300 CLEAN COMMUNITIES - 2018

Overtime: G-02-8C-855-300 CLEAN COMMUNITIES - 2018

Shift Differential: - - - -

Holiday: - - - -

Default Schedule Id:

EEO Function:

Department Head: JJ ←

Department Head Back Up:

Default Pay Period Id:

For a supervisor approval you will need to assign it in the employee maintenance.

GO TO Personal >Employee > Employee Maintenance

Employee Maintenance - General Data

Employee Id: 90002 Previous Next Go To: General Data

First Name: Middle Init: Last Name: AMERIHEALTH INS CO Suffix:

Main Classification Dates Salary/Rates Hrs Pension Emergency Demographics Hire Check ACA Notes

Street 1: P.O. BOX 70250 Soc Sec#: Sex: Salutation:

Street 2: Nickname:

City: ANYWHERE Former Name:

State: PA Zip: 01234- Badge Num:

Dept: AGY - AGENCY CHECKS

Hours Id: 40HR-WK Location Id: Attendance Approver:

Position: Supervisor: CAR03

Job Title Id: DOP Id:

DOP Status: DOP Status Date: / /

Work Ph: () - Ext: Cell: () -

Home Ph: () - Pager: () -

Email Addr: AMERIHEALTH0INS0CO@SOMEWHERE.ORG E-Check

Driv Lic: Lic Exp Date: / /

HR Enhancements

Employee Maintenance - Deduction Start/End Dates

A deduction start date can now be specified on a deduction/earning code. A payroll deduction start date can also be specified on a benefit so that the corresponding payroll deduction is updated. A deduction end date may also be specified if the user wants the deduction to stop after a certain date.

Employee Maintenance - Deductions/Earnings

Employee Id: ATKI01 Previous Next Go To: Deductions/Earnings

First Name: Chris Middle Init: Last Name: Atkinson Suffix:

Code	Description	Type	# Spc Pays	Amt/Prc	Freq	Start Date	End Date
AFT	AFLAC after-tax deduction	Amt	0	38.46	Bi-Weekly	10/01/2017	
DC1	Valic	Amt	0	700.00	Monthly		
LST	Local Services Tax	Amt	0	10.00	Bi-Weekly		
PEN	PMRS Non-Uniforms	Prc of Gross	0	3.00	Bi-Weekly		

Create Standard Time Entries

Time Entry Maintenance

Two major enhancements have been made to the Time Entry Maintenance:

1. Ability to recalculate an individual time entry
2. For HR users, the ability to edit and add attendance transactions in the Time Entry Maintenance Recalculate

After making changes to a time entry, users may now recalculate the individual time entry to review the impact the changes have made on the employee's pay without having to recalculate the entire payroll. The recalculation will produce a payroll register and budget distribution report for the employee.

Actual Hours	Sick	Vacation	Admin	Other	Comp	Holiday
Regular: 80.00	.00	.00	.00	.00	.00	.00
Overtime: 11.00						
Special: .00						
Total Base: 80.00						
Total Non-Base: 11.00						
Total Hours: 91.00						

Attendance Tab

H/R Attendance users will now notice an Attendance tab on the Time Entry Maintenance. This tab will allow users to modify imported attendance or add new attendance transactions.

The screenshot shows the 'Time Entry Maintenance - General' window. At the top, there is a toolbar with buttons for Add, Save, Cancel, Delete, Previous, Next, Detail, and Recalculate. Below the toolbar, the Employee Id is ABATE005 and the Name is Abate, Randi. The Prd End Date is 09/27/2017 and the Check Entry Num is 0. The Prd Begin Date is 09/14/2017, and the 'Imported Attendance' checkbox is checked. The 'Attendance' tab is selected and highlighted with a red box. Below the tabs are buttons for Add, Edit, and Delete. The main area contains a table with the following data:

Date	Day	Att Code	Pay Type	Hours	Rate	Budget Acct	Account De
09/01/2017	FRI	REG	Regular	8.00	49.5931	- - - - -	
09/03/2017	SUN	OT	Overtime	3.00	74.3897	7-01-25-240-240-112	POLICE OVERTIME
09/04/2017	MON	HOL	Regular	8.00	49.5931	- - - - -	
09/05/2017	TUE	REG	Regular	8.00	49.5931	- - - - -	
09/06/2017	WED	REG	Regular	8.00	49.5931	- - - - -	
09/07/2017	THU	REG	Regular	8.00	49.5931	- - - - -	
09/08/2017	FRI	REG	Regular	3.00	49.5931	- - - - -	
09/11/2017	MON	REG	Regular	8.00	49.5931	- - - - -	

Click Edit on the main toolbar to enable the Attendance tab's toolbar.

Add - Click to add a new attendance transaction. Adding a new transaction will also create a transaction in the Attendance module.

Edit - Select a row and click Edit or double click on a row to change an attendance transaction's date, code, hours, rate charge account, description, or tracking id. Modifying a transaction will also update the Attendance module.

Delete - Select a row and click Delete to permanently delete an attendance transaction. This not only removes the transaction from the time entry, but also removes it from the Attendance module. Click Save on the main toolbar to save the changes.

Timesheets

Employee Timesheets

Pay Period: GENERAL General Pay Period 09/04/2017 09/17/2017 Show Weekends:

Emp Id: ABATEN5 Position: POLICE OFFICER POLICE OFFICER

Name: Randi Abate Schedule Id: 80 HR

Type: Salaried Status: Active Status Date: / /

09/04 (MON)	09/05 (TUE)	09/06 (WED)	09/07 (THU)	09/08 (FRI)																														
<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>HOL</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	HOL	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft
Att Code	Hours	Status																																
HOL	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
09/11 (MON)	09/12 (TUE)	09/13 (WED)	09/14 (THU)	09/15 (FRI)																														
<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft	<table border="1"> <thead> <tr> <th>Att Code</th> <th>Hours</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>REG</td> <td>8.00</td> <td>Draft</td> </tr> </tbody> </table> <p>Total Hours: 8.00</p>	Att Code	Hours	Status	REG	8.00	Draft
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																
Att Code	Hours	Status																																
REG	8.00	Draft																																

Total Base: 80.00 HOL: 8.00
 Total Non-Base: .00 REG: 72.00
 Total Hours: 80.00

Tip: Hold down the Ctrl key and press Tab while editing an Attendance Code to edit the next day.

Days Toolbar

Add - Click Add on a day's toolbar to add a new transaction. Type in or use the picklist to select an attendance code. Enter the number of hours. If you need to enter an entry description, change the rate, charge account or tracking id, click the Detail button on the toolbar. Click Save on the main toolbar when finished.

Edit - Select an existing row and click Edit on the day's toolbar to change the attendance code or hours for the row. If you need to enter an entry description, change the rate, charge account or tracking id, click the Detail button on the toolbar. Click Save on the main toolbar when finished.

Detail - With a row selected in add/edit mode, click this button to enter additional information for the transaction. Only users with proper security may change rates. Click Ok to continue.

Attendance Detail

Attendance Code: OT

Description: OVERTIME

Hours/Days: 8

Pay Type: Overtime

Rate: 74.3897

Budget Account: 7-01-25-240-240-112

Account Descript: POLICE OVERTIME

Entry Descript: Holiday 01

Status: Draft

Tracking Id:

Start Time: :

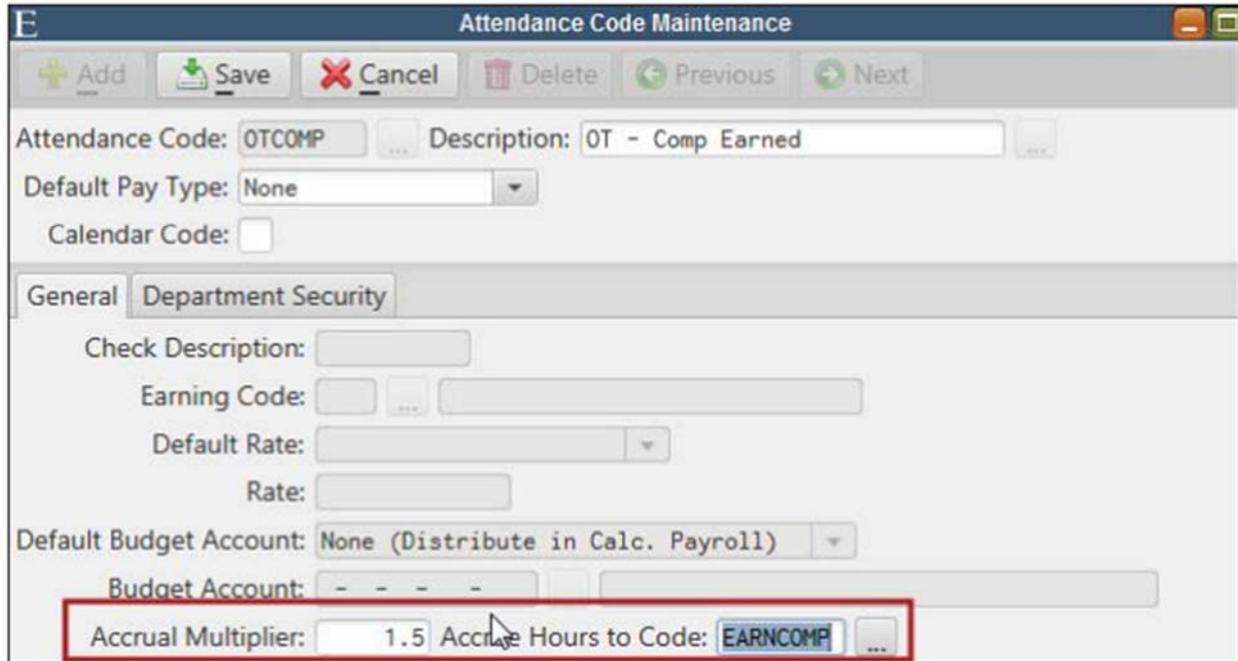
OK Cancel

Delete - Select an existing row and click Delete to remove the transaction. Click Save on the main toolbar when finished.

Attendance Codes

Accrual Multipliers

Codes may be configured to accrue time at a specified rate for time worked. For example, a code for OT worked may be created that will automatically accrue comp time at a time and a half rate



The screenshot shows the "Attendance Code Maintenance" window. The "Attendance Code" field is set to "OTCOMP" and the "Description" is "OT - Comp Earned". The "Default Pay Type" is "None". The "Calendar Code" is empty. The "General" tab is selected, and the "Accrual Multiplier" is set to "1.5". The "Accrue Hours to Code" is set to "EARNCOMP". A red box highlights the "Accrual Multiplier" and "Accrue Hours to Code" fields.

In the above example, the user would enter the OTCOMP attendance code (None pay type) and the number of hours worked. The system will then insert the EARNCOMP (Accrued Comp pay type) code with the correct number of comp hours earned (hours worked x 1.5).