Employee Data Changes HR FRONT END TRAINING HOW-TO GUIDE



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Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

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Course Information

Employee Data Changes
October 10, 2020
1.0

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.

1	• Locate the employee's record
2	 Select Employee Data from the Transaction Menu.
3	 Change the appropriate employee data and click Save.
4	 Review the proposed changes in the Employee Record View.
5	• Transaction is routed/applied to Banner.

HR Front End Employee Data Changes Quick View

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Introduction

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

What Is an Employee Data Change?

Employee Data Changes are changes made to the Employee General Information in the HR Front End Application. Examples of these type(s) of changes are:

- Name Changes
- Social Security Number Corrections
- Chart of Accounts Changes
- Employee Class Changes
- Visa Changes

Conventions Used in this Guide



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



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



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

Completing an Employee Data Change

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.

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Figure 1: Employee Search Screen

3. From the Transactions menu, select Employee Data.

Employee Data is now editable.

4. Expand the Employee General Information accordion.

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Figure 2: Selecting Employee Data Transaction

5. Enter new data in the necessary fields and click **Tab** to move to next field.

New field values are displayed in Red. Old values are displayed below in white.

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NOTE: Editable fields include: Name, Home Chart Org, Check Distribution Org, Hire Dates, Service Dates, E-Class, Benefit Category, Citizenship, Visa, and Leave of Absence dates.

To modify the Social Security Number, click on the **BIO/DEMO** tab.

6. When all changes have been made, click Save.

Transaction is saved. Changes are displayed under Proposed Changes Accordion.

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Figure 3: Employee Data Change Example

7. When all changes have been made and necessary documents have been attached to the transaction, click **Route**.

Screen refreshes and success routing message appears the yellow message area at the top of the page.

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Figure 4: Success Routing Message

Employee Data Change Process Flow

Below is the flow of the Employee Data Change process.



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Appendix A: Screenshots from HRFE Video



CHAPTER	YOU WILLLEARN ABOUT
1 – Common Terminology	Common Terminology What an Employee Data Change is Employee Data Change Quick View
2 – Initiating and Completing Employee Data Change Transaction	 How to initiate an Employee Data Change How to make changes How to save About the Proposed Changes How to Route
3 – Course Review	 You will participate in activities that will assess your understanding of the content covered in this course





Employee Data Change - Button Functionality

Apply	The Apply feature completes the transaction and applies the data to Banner.
	The User must have Apply permissions for this button to be active
Close	The Close button enables the user to exit the transaction.
Continue	The Continue button is used to proceed through the screens of a Wizard
Delete Transaction	The Delete Transaction button is used to delete a transaction from the system.
Print Friendly View	The Print Friendly View button opens a separate window that will align the data from the current screen in a format that can be easily printed.
Route	The Route feature sends the transaction on to the next stop in the predetermined routing for the transaction.
Save	The Save button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User's Inbox (My Inbox)
Send To	The Send To feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.

Course Menu







CH.2 - P.1/7



Course Menu

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