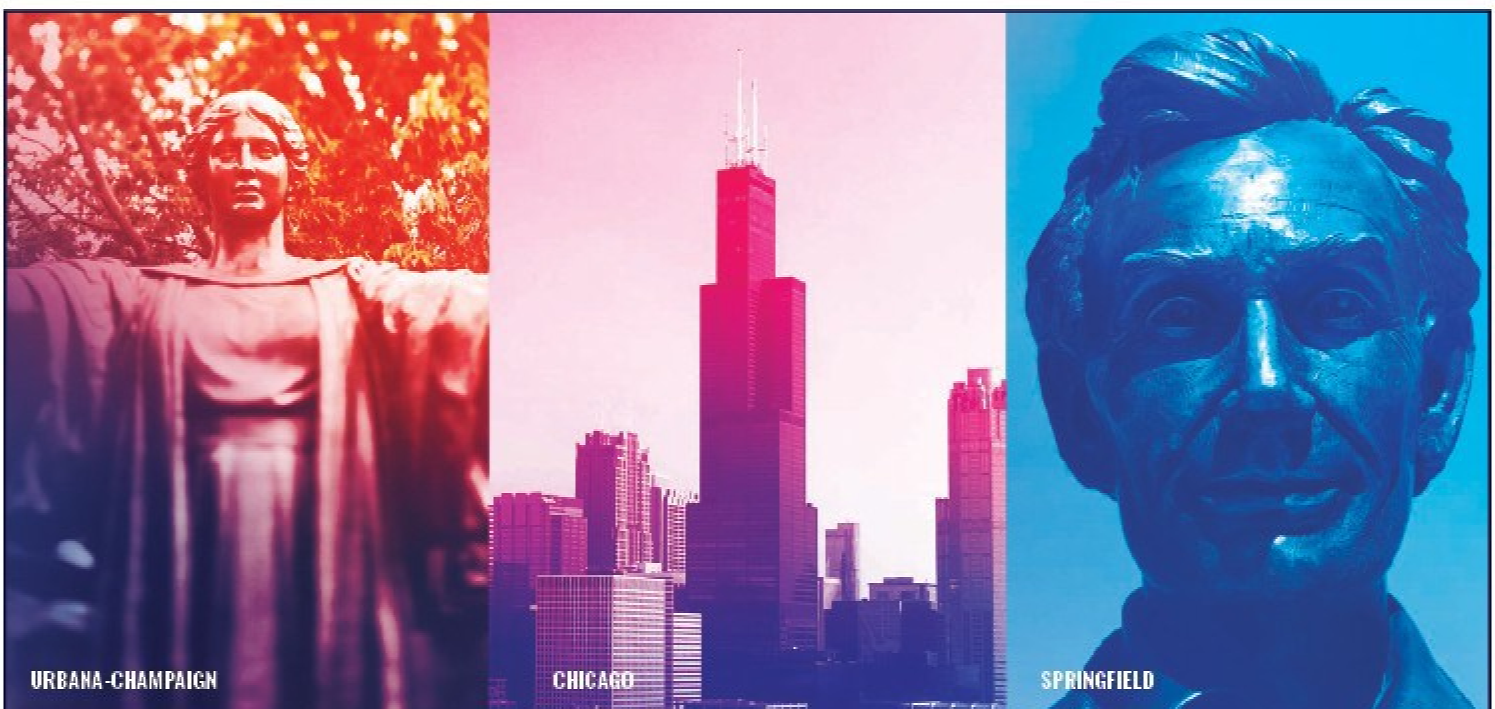
Employee Data Changes

HR FRONT END TRAINING

HOW-TO GUIDE



UNIVERSITY OF ILLINOIS SYSTEM

Acknowledgements

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

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Course Information

Course ID:	Employee Data Changes
Revision Date:	October 10, 2020
Version:	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.

HR Front End Employee Data Changes Quick View

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.

TABLE OF CONTENTS

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 **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 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.

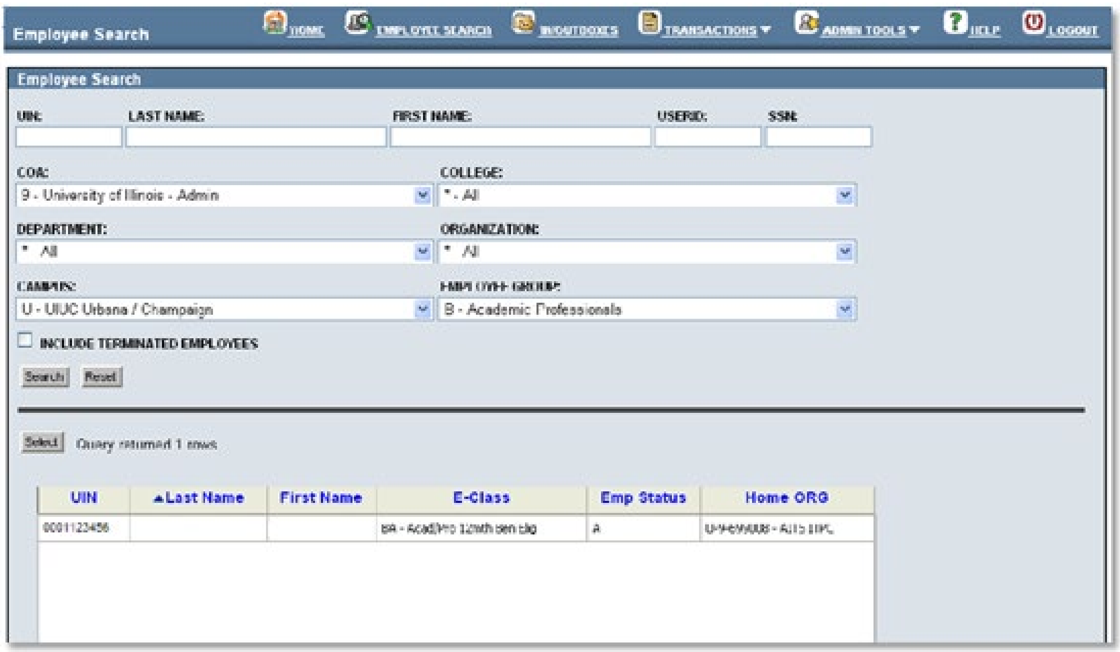


Figure 1: Employee Search Screen

3. From the **Transactions** menu, select **Employee Data**.

   Employee Data is now editable.

4. Expand the **Employee General Information** accordion.

   Current Employee Data is displayed.

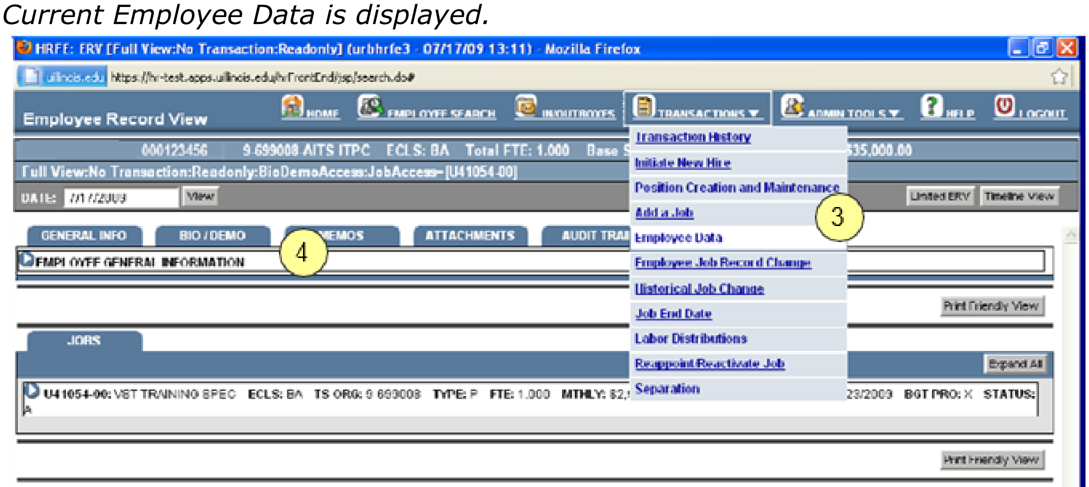


Figure 2: Selecting Employee Data Transaction

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.

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.

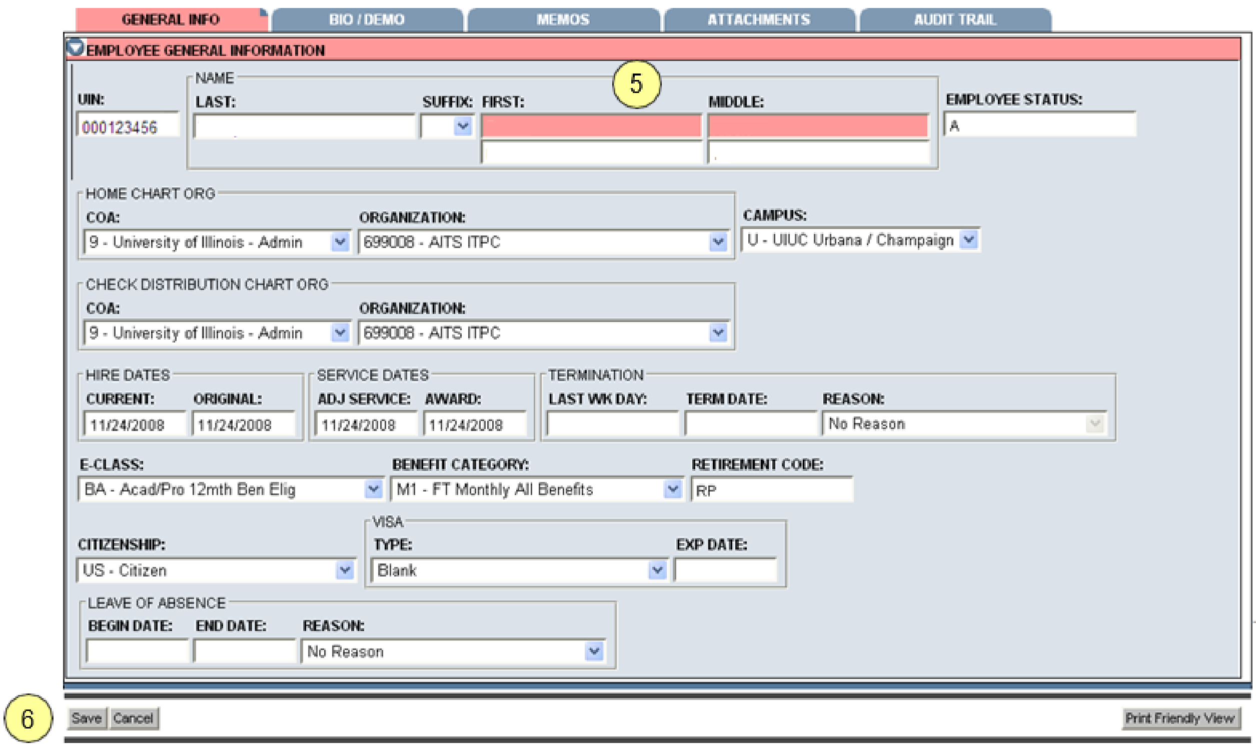


Figure 3: Employee Data Change Example

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.

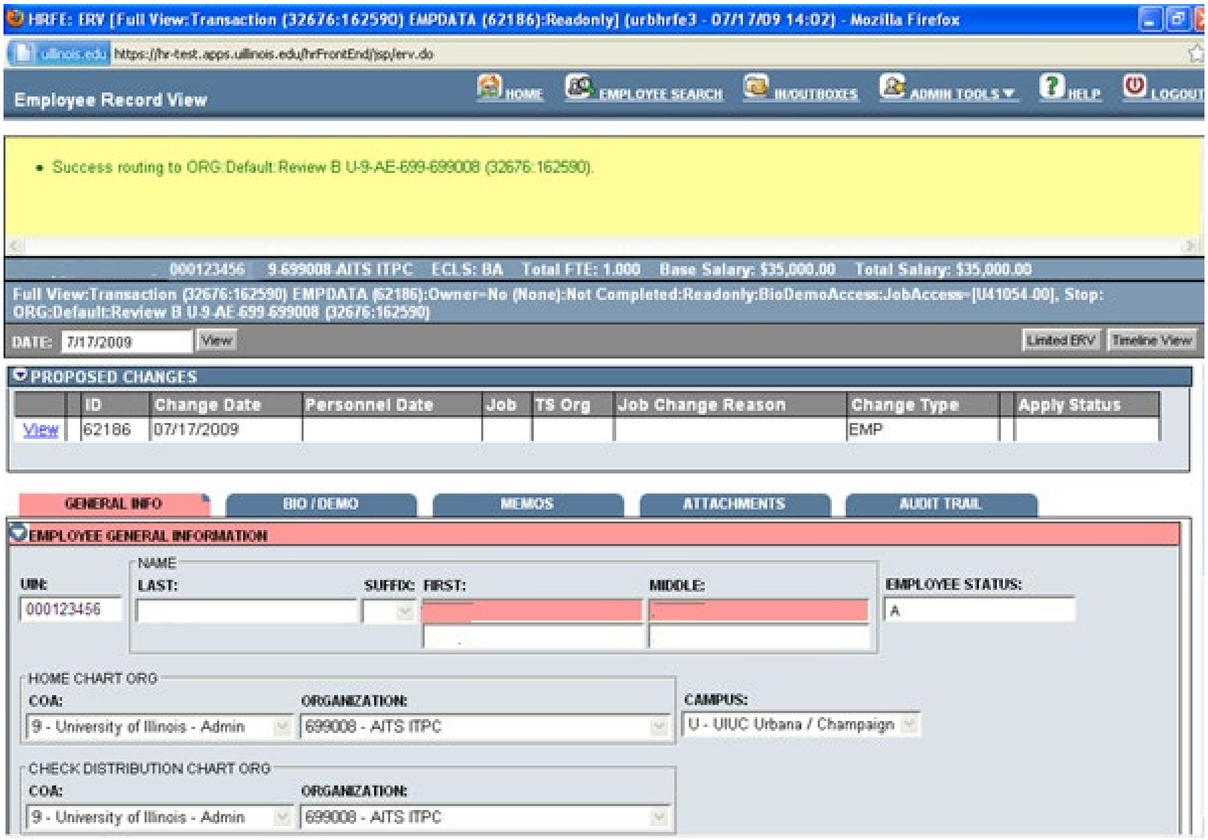
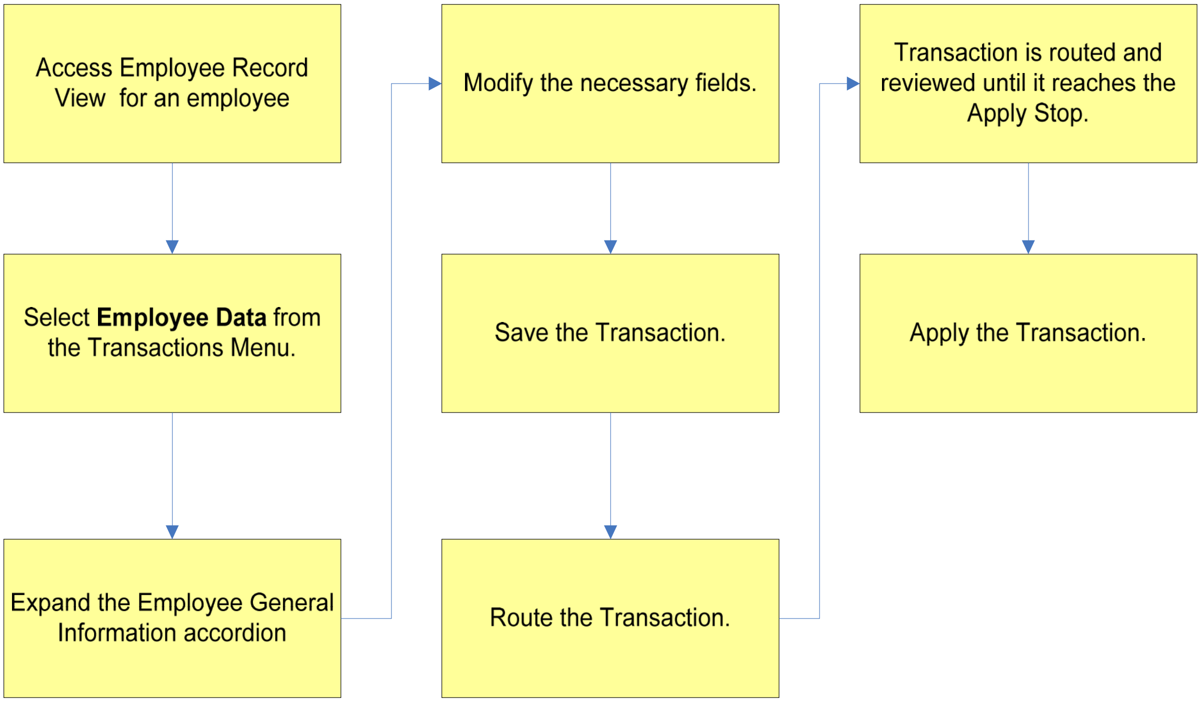


Figure 4: Success Routing Message

Employee Data Change Process Flow

Below is the flow of the Employee Data Change process.



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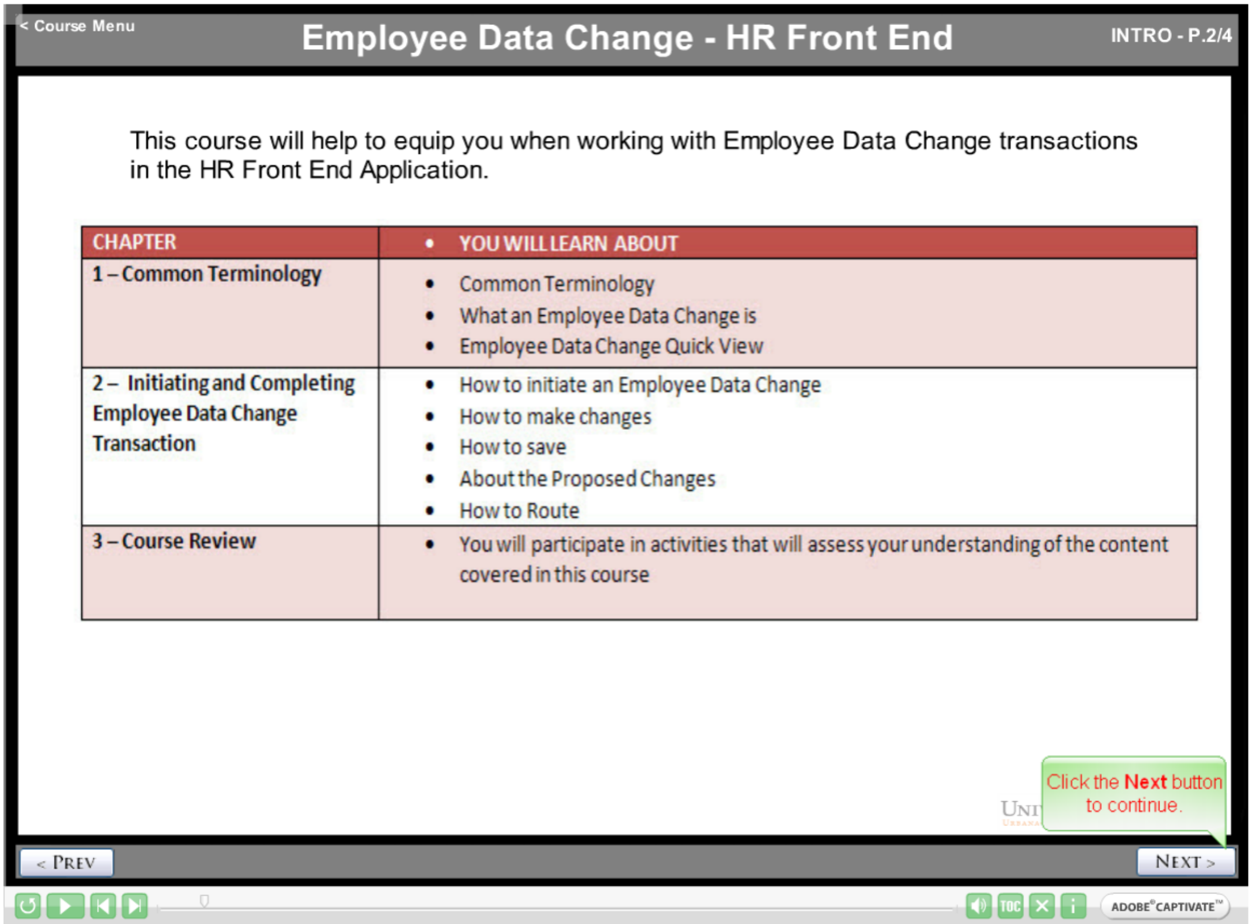
Appendix A: Screenshots from HRFE Video



< Course Menu

Employee Data Change - HR Front End

INTRO - P.2/4

This course will help to equip you when working with Employee Data Change transactions in the HR Front End Application.

CHAPTER	• YOU WILL LEARN 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

Click the **Next** button to continue.

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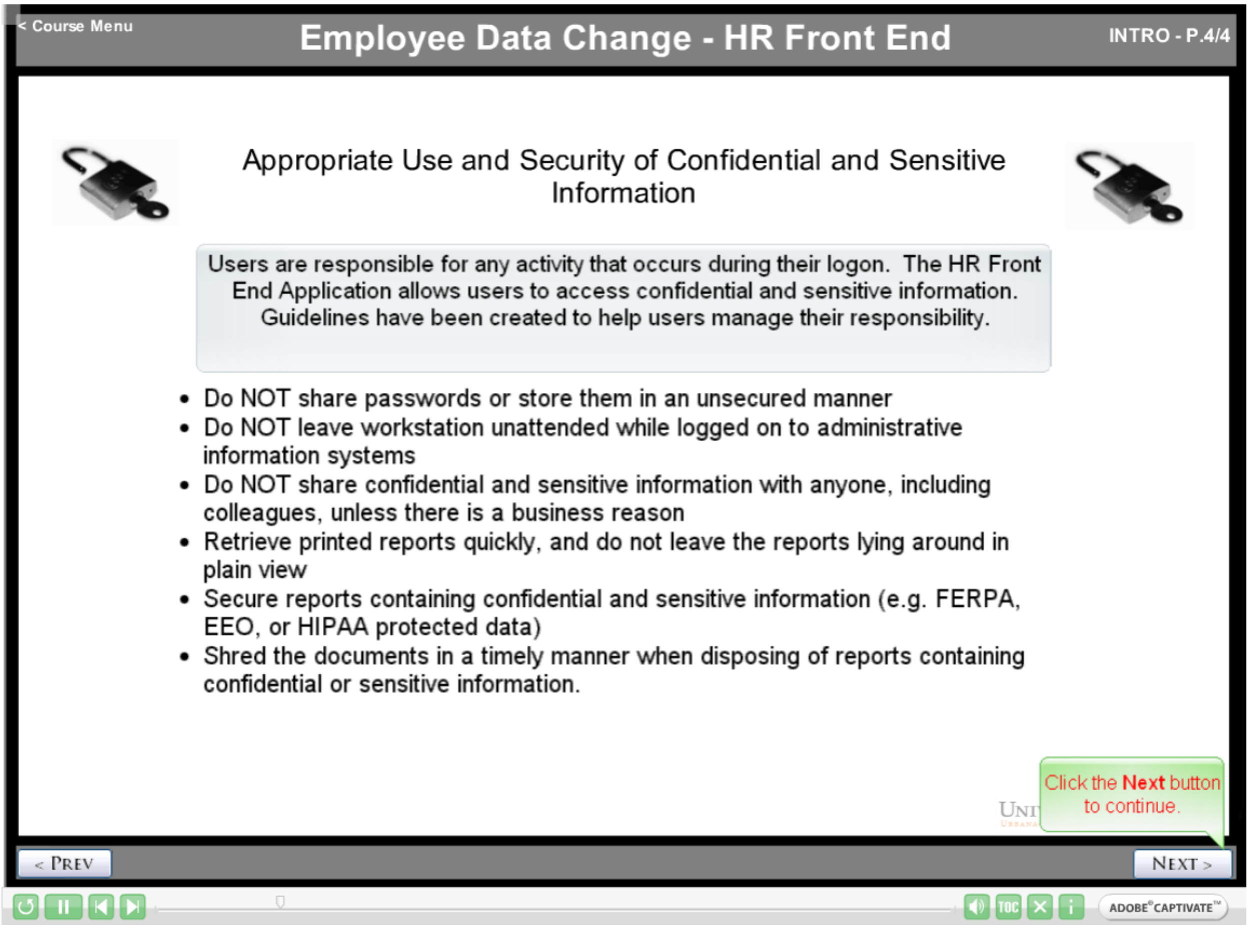
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Appropriate Use and Security of Confidential and Sensitive Information
Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.
• Do NOT share passwords or store them in an unsecured manner
• Do NOT leave workstation unattended while logged on to administrative information systems
• 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.
Click the Next button to continue.
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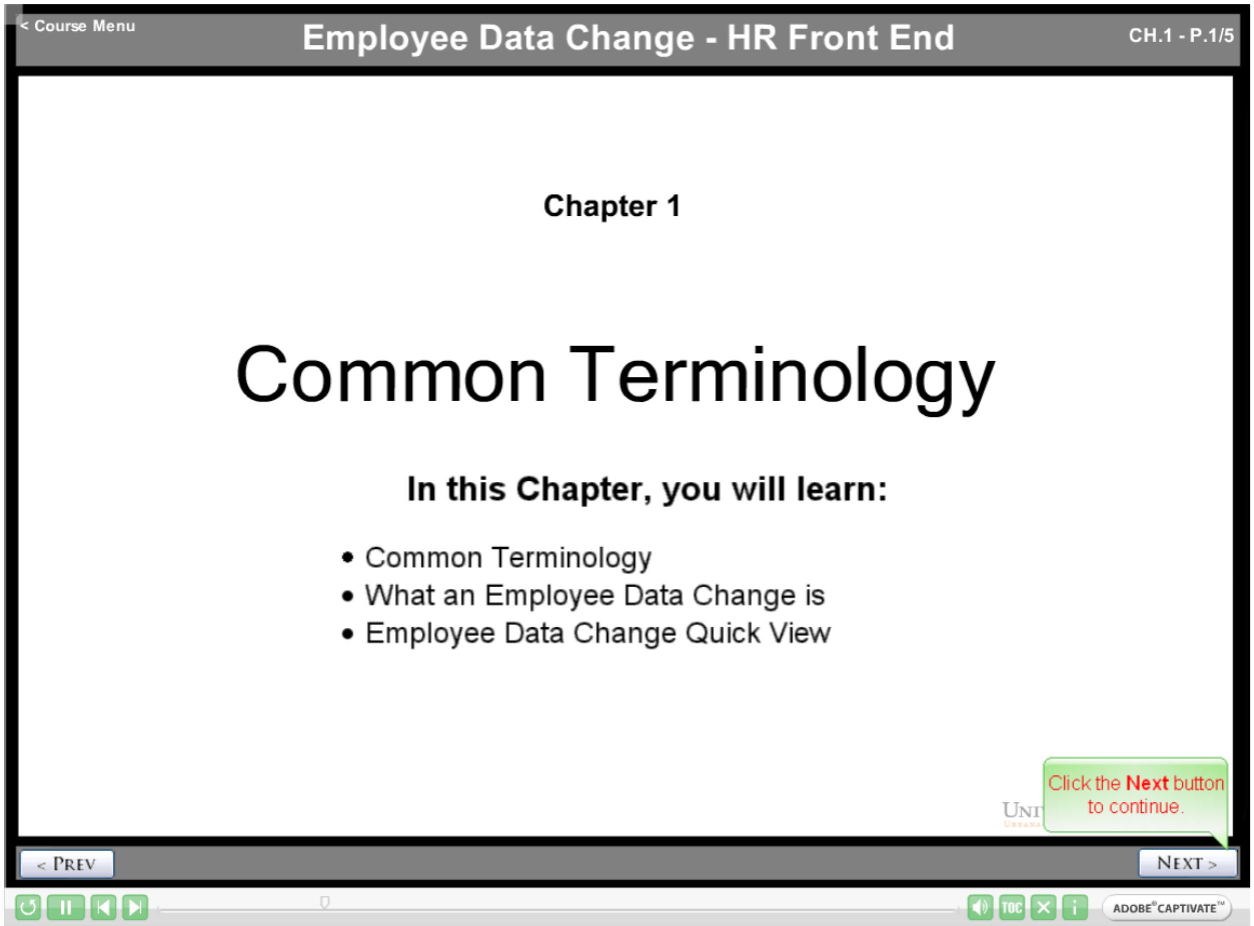
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CH.1 - P.1/5
Chapter 1
Common Terminology
In this Chapter, you will learn:
• Common Terminology
• What an Employee Data Change is
• Employee Data Change Quick View
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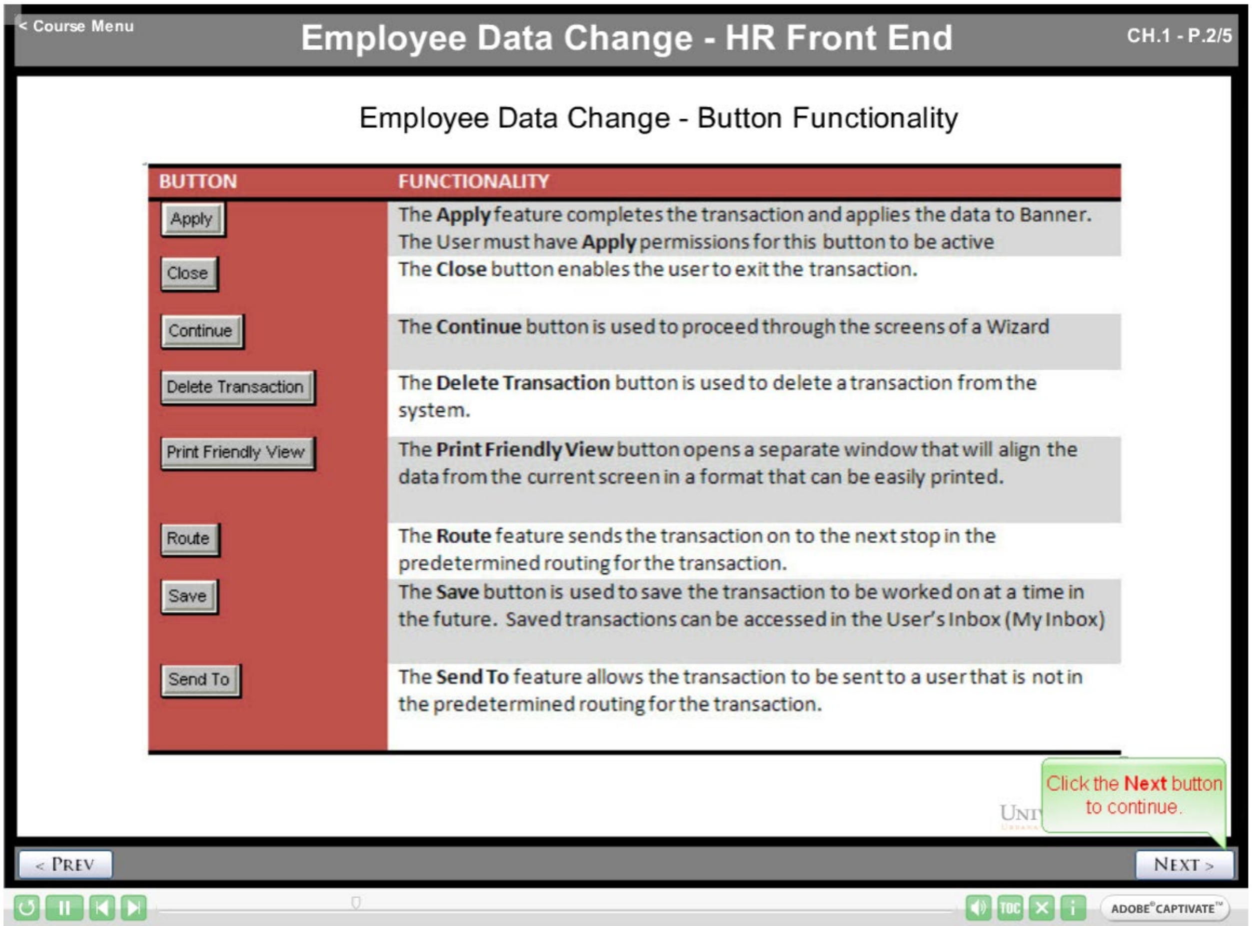
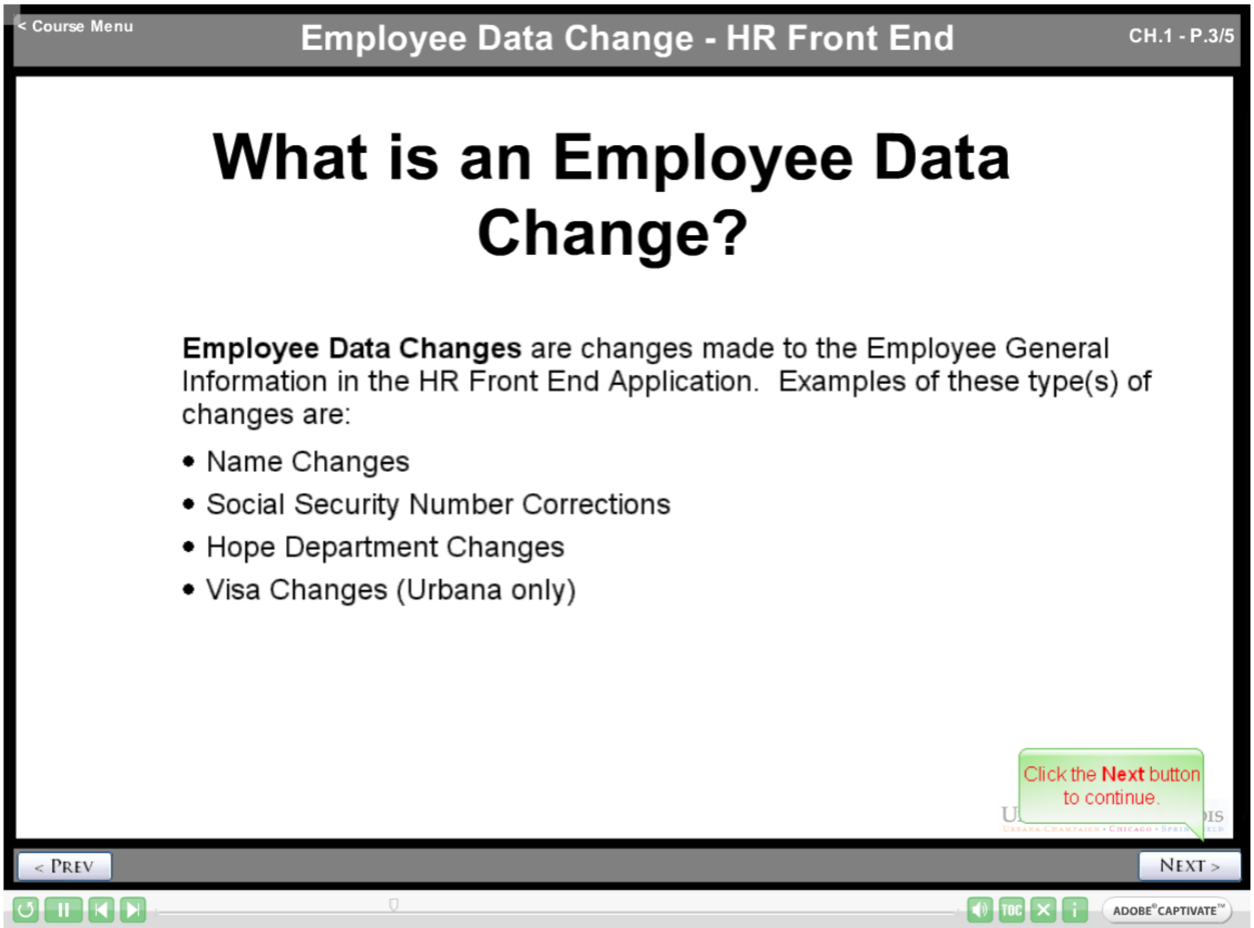


Employee Data Change - Button Functionality

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.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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
• Hope Department Changes
• Visa Changes (Urbana only)
Click the **Next** button to continue.
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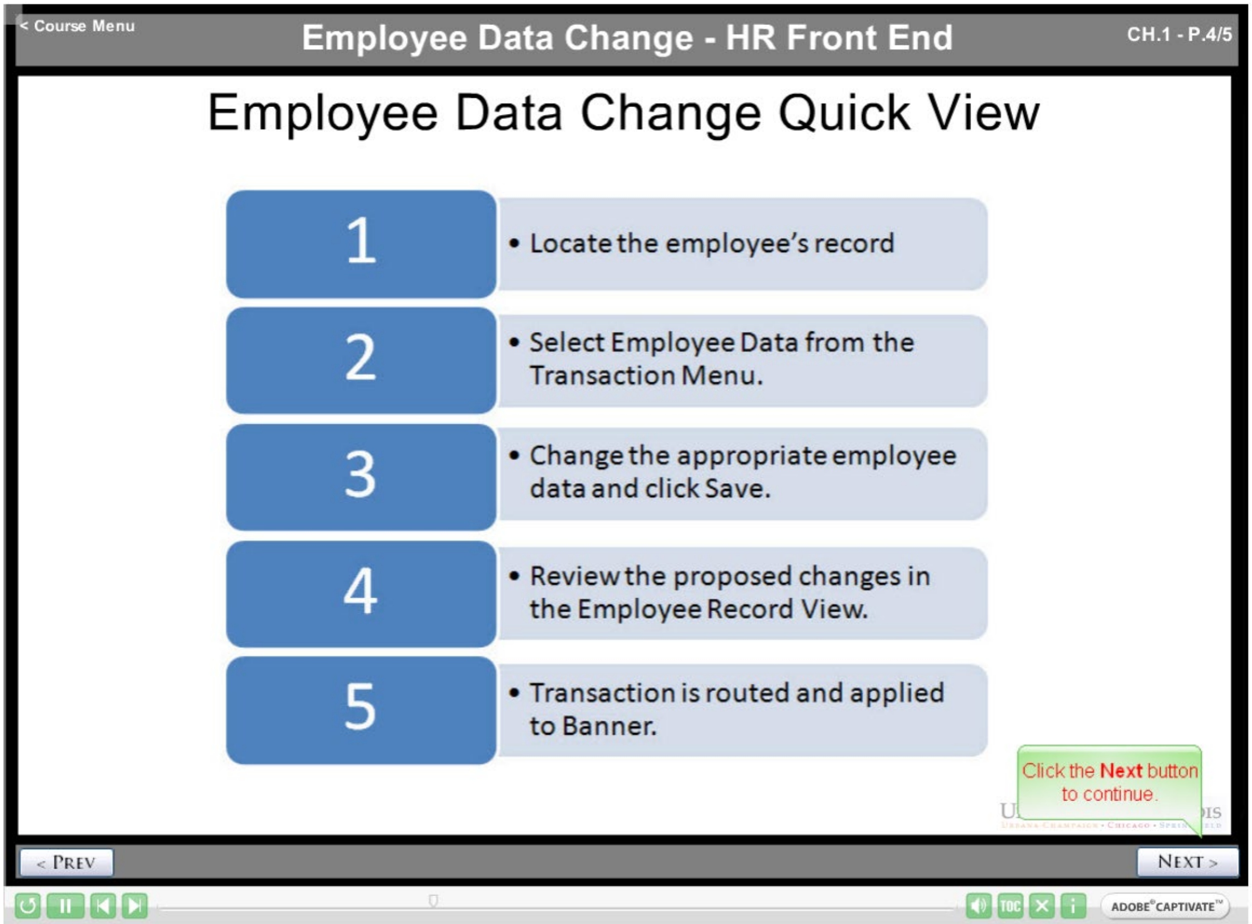

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• Locate the employee's record
2
• Select Employee Data from the Transaction Menu.
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• Change the appropriate employee data and click Save.
4
• Review the proposed changes in the Employee Record View.
5
• Transaction is routed and applied to Banner.
Click the Next button to continue.
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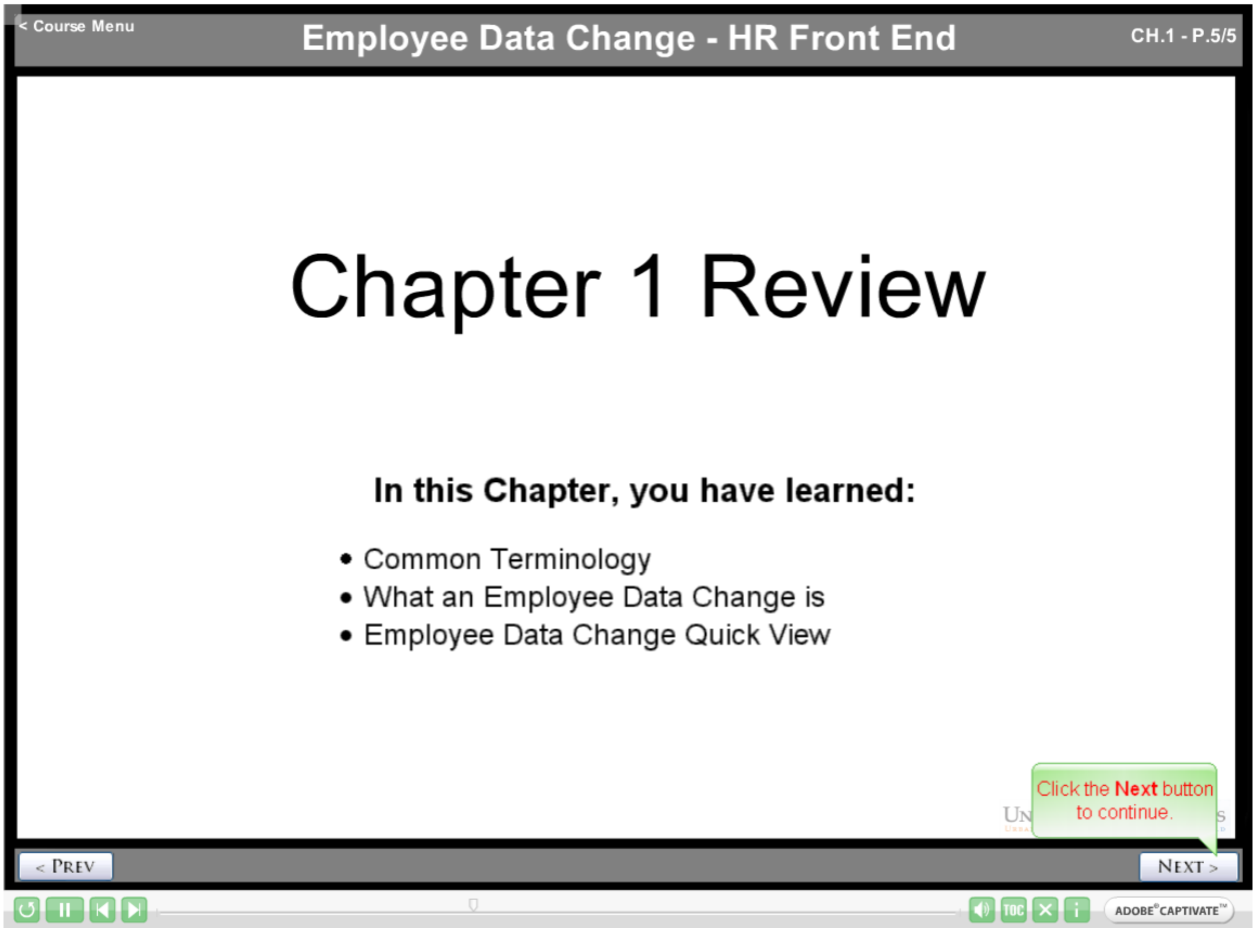
< Course Menu
Employee Data Change - HR Front End
CH.1 - P.5/5
Chapter 1 Review
In this Chapter, you have learned:
• Common Terminology
• What an Employee Data Change is
• Employee Data Change Quick View
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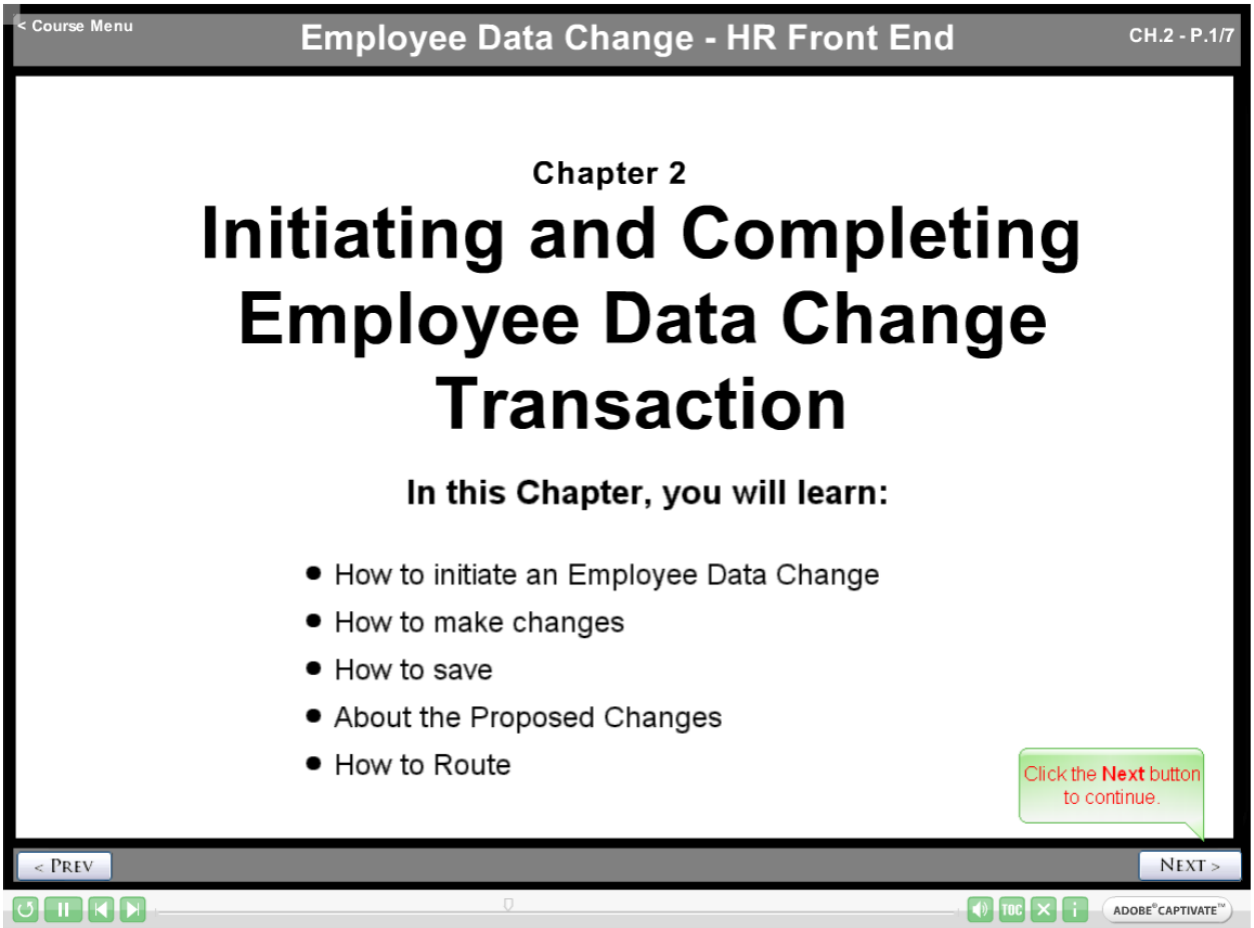
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CH.2 - P.1/7
Chapter 2
Initiating and Completing Employee Data Change Transaction
In this Chapter, you will learn:
How to initiate an Employee Data Change
How to make changes
How to save
About the Proposed Changes
How to Route
Click the Next button to continue.
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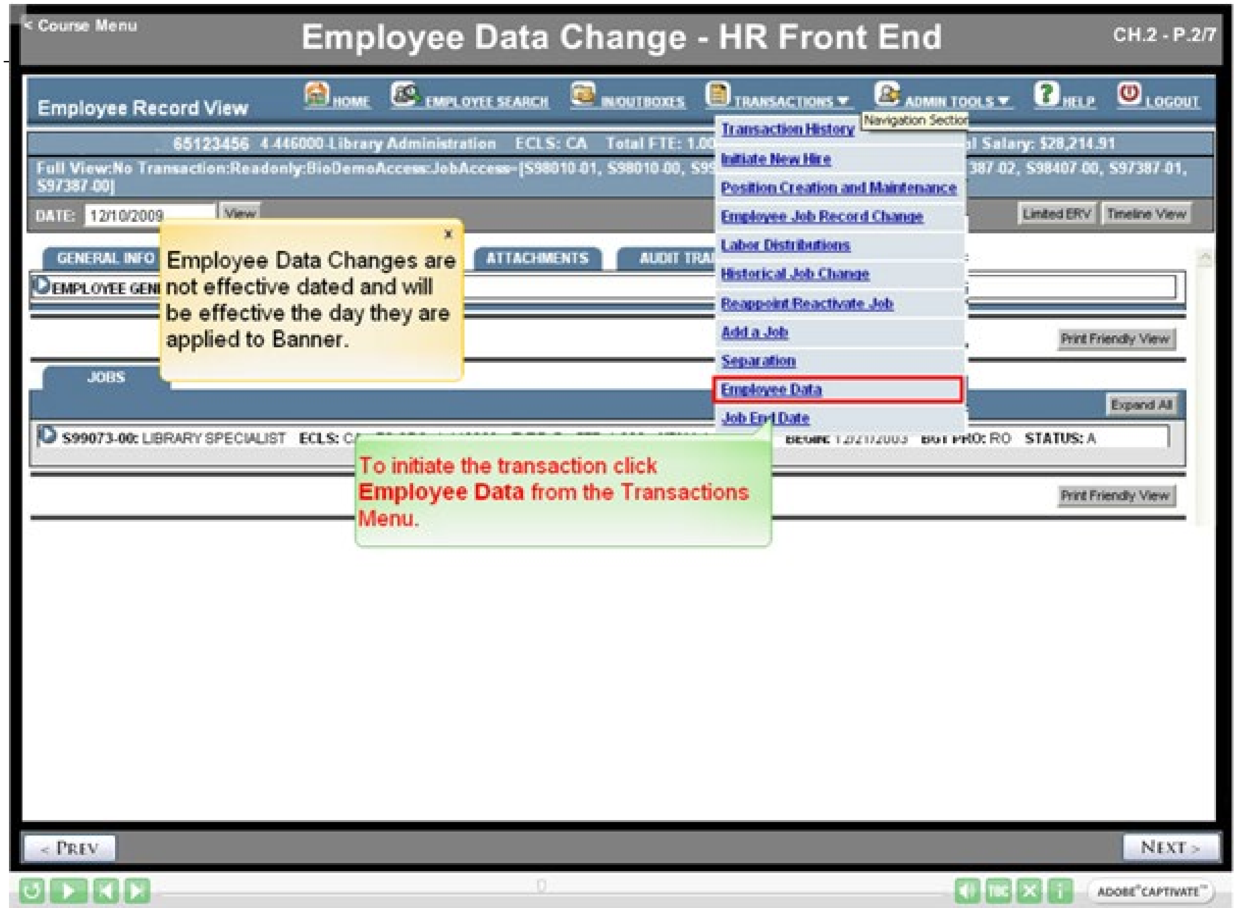

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HOME
EMPLOYEE SEARCH
IN/OUTBOXES
TRANSACTIONS
ADMIN TOOLS
HELP
LOGOUT
Navigation Section
Transaction History
Initiate New Hire
Position Creation and Maintenance
Employee Job Record Change
Labor Distributions
Historical Job Change
Reappoint Reactivate Job
Add a Job
Separation
Employee Data
Job End Date
Employee Data Changes are not effective dated and will be effective the day they are applied to Banner.
To initiate the transaction click **Employee Data** from the Transactions Menu.
GENERAL INFO
ATTACHMENTS
JOBS
Expand All
Print Friendly View
Limited ERV
Timeline View
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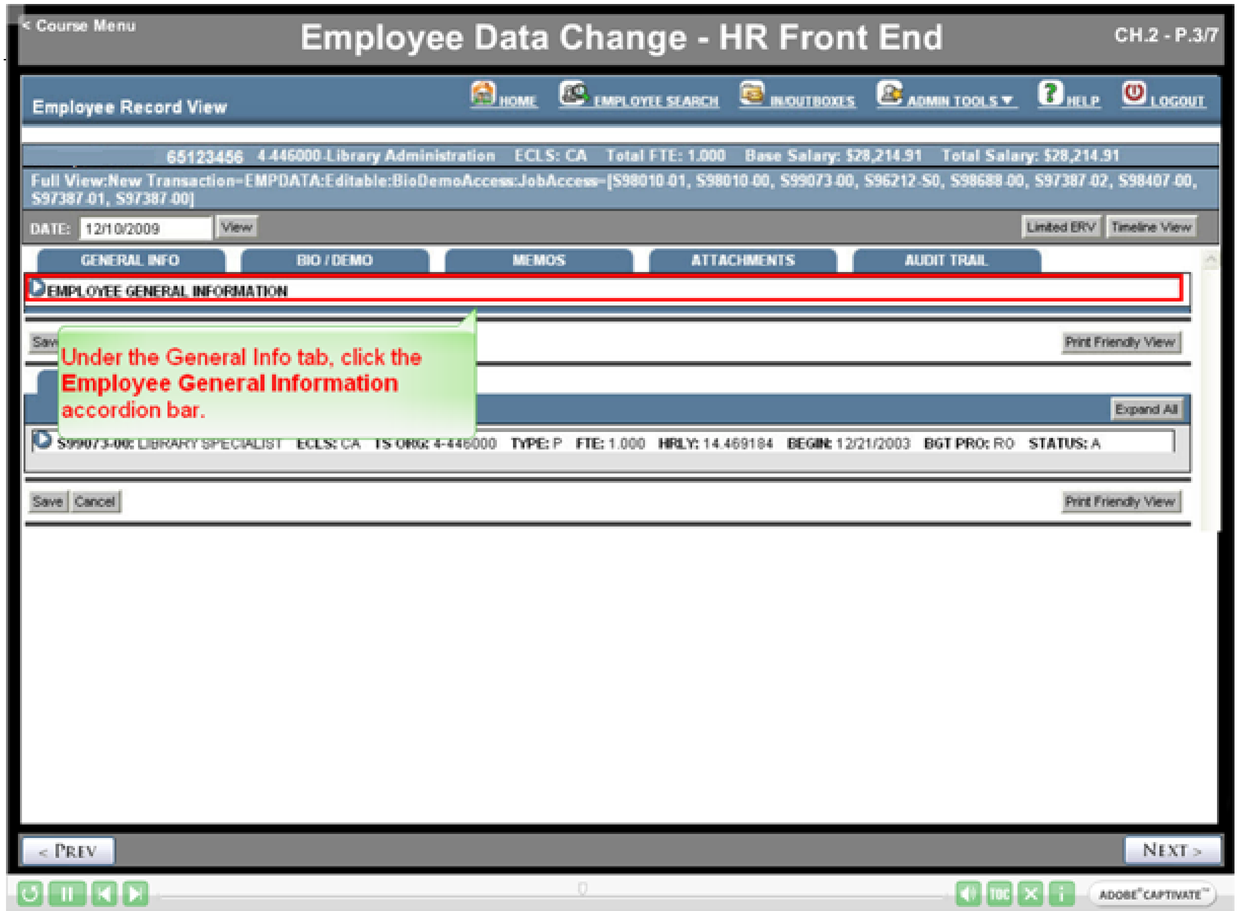
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Employee Record View
HOME
EMPLOYEE SEARCH
IN/OUTBOXES
ADMIN TOOLS
HELP
LOGOUT
65123456 4-446000-Library Administration ECLS: CA Total FTE: 1.000 Base Salary: $28,214.91 Total Salary: $28,214.91
Full View:New Transaction-EMPDATA:Editable:BioDemoAccess:JobAccess-[S98010-01, S98010-00, S99073-00, S96212-S0, S98688-00, S97387-02, S98407-00, S97387-01, S97387-00]
DATE: 12/10/2009
View
Limited ERV
Timeline View
GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
Under the General Info tab, click the **Employee General Information** accordion bar.
Print Friendly View
Expand All
S99073-00: LIBRARY SPECIALIST ECLS: CA TS ORG: 4-446000 TYPE: P FTE: 1.000 HRLY: 14.469184 BEGIN: 12/21/2003 BGT PRO: RO STATUS: A
Save
Cancel
Print Friendly View
< PREV
NEXT >
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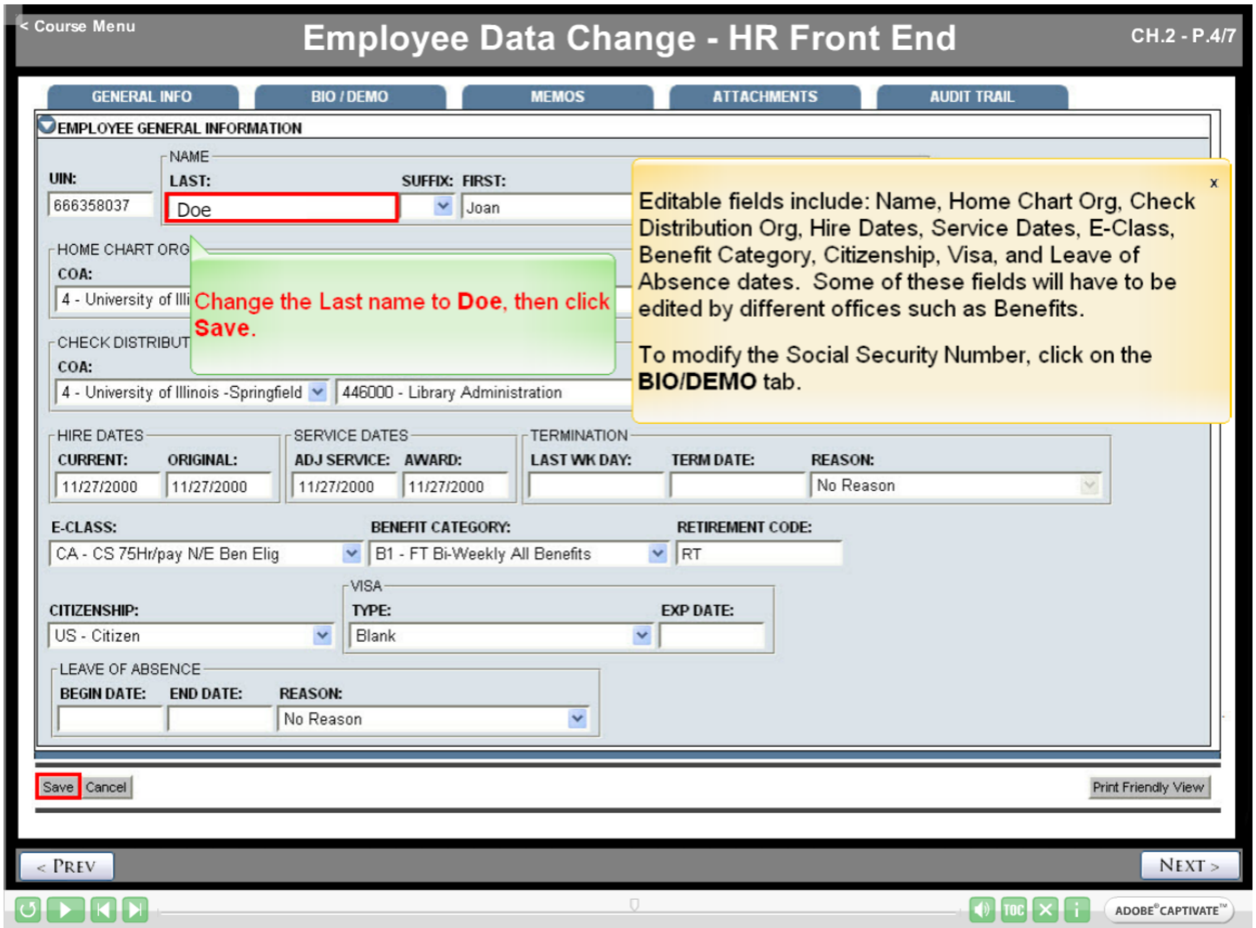
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GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
NAME
UIN:
LAST:
SUFFIX:
FIRST:
666358037
Doe
Joan
HOME CHART ORG
COA:
4 - University of Illi
CHECK DISTRIBUT
COA:
4 - University of Illinois -Springfield
446000 - Library Administration
Change the Last name to Doe, then click Save.
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. Some of these fields will have to be edited by different offices such as Benefits.
To modify the Social Security Number, click on the BIO/DEMO tab.
HIRE DATES
CURRENT:
ORIGINAL:
11/27/2000
11/27/2000
SERVICE DATES
ADJ SERVICE:
AWARD:
11/27/2000
11/27/2000
TERMINATION
LAST WK DAY:
TERM DATE:
REASON:
No Reason
E-CLASS:
CA - CS 75Hr/pay N/E Ben Elig
BENEFIT CATEGORY:
B1 - FT Bi-Weekly All Benefits
RETIREMENT CODE:
RT
VISA
CITIZENSHIP:
US - Citizen
TYPE:
Blank
EXP DATE:
LEAVE OF ABSENCE
BEGIN DATE:
END DATE:
REASON:
No Reason
Save
Cancel
Print Friendly View
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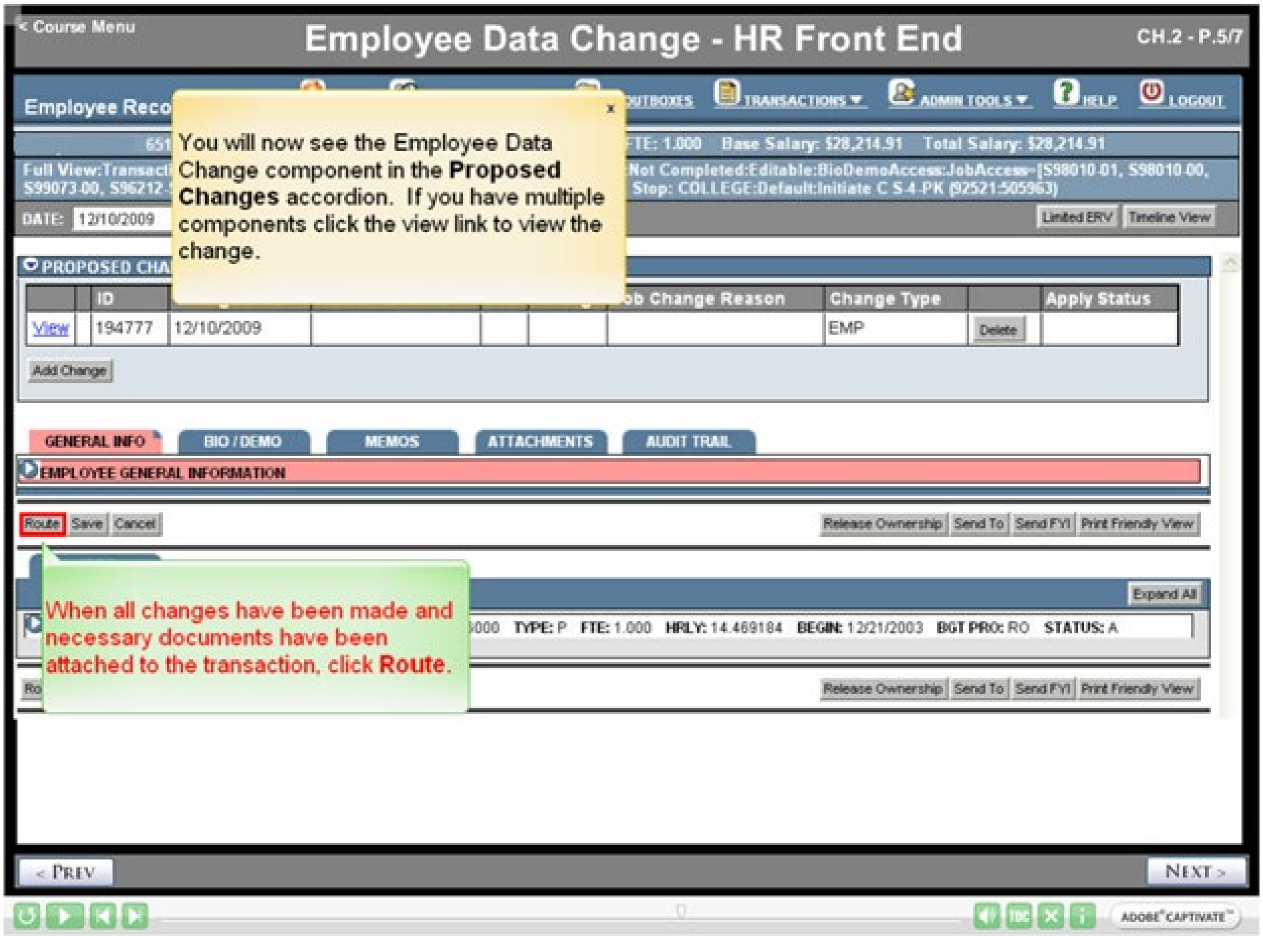

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You will now see the Employee Data Change component in the Proposed Changes accordion. If you have multiple components click the view link to view the change.
When all changes have been made and necessary documents have been attached to the transaction, click Route.
GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
Route
Save
Cancel
Release Ownership
Send To
Send FYI
Print Friendly View
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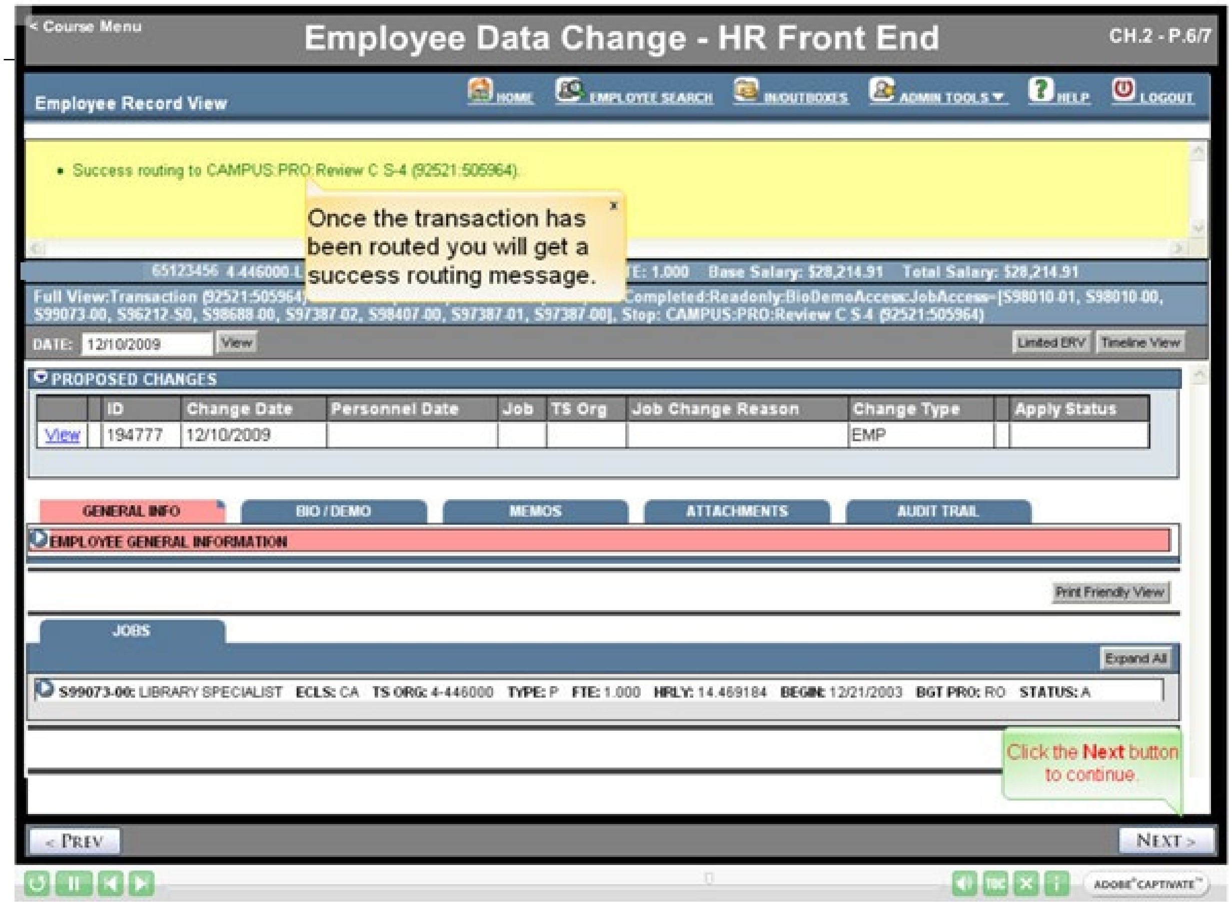
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Employee Record View
HOME
EMPLOYEE SEARCH
IN/OUTBOXES
ADMIN TOOLS
HELP
LOGOUT
Success routing to CAMPUS:PRO:Review C S-4 (92521:505964).
Once the transaction has been routed you will get a success routing message.
Base Salary: $28,214.91
Total Salary: $28,214.91
DATE: 12/10/2009
View
Limited ERV
Timeline View
PROPOSED CHANGES
ID
Change Date
Personnel Date
Job
TS Org
Job Change Reason
Change Type
Apply Status
View
194777
12/10/2009
EMP
GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
Print Friendly View
JOBS
Expand All
S99073-00: LIBRARY SPECIALIST ECLS: CA TS ORG: 4-446000 TYPE: P FTE: 1.000 HRLY: 14.469184 BEGIN: 12/21/2003 BGT PRO: RO STATUS: A
Click the Next button to continue.
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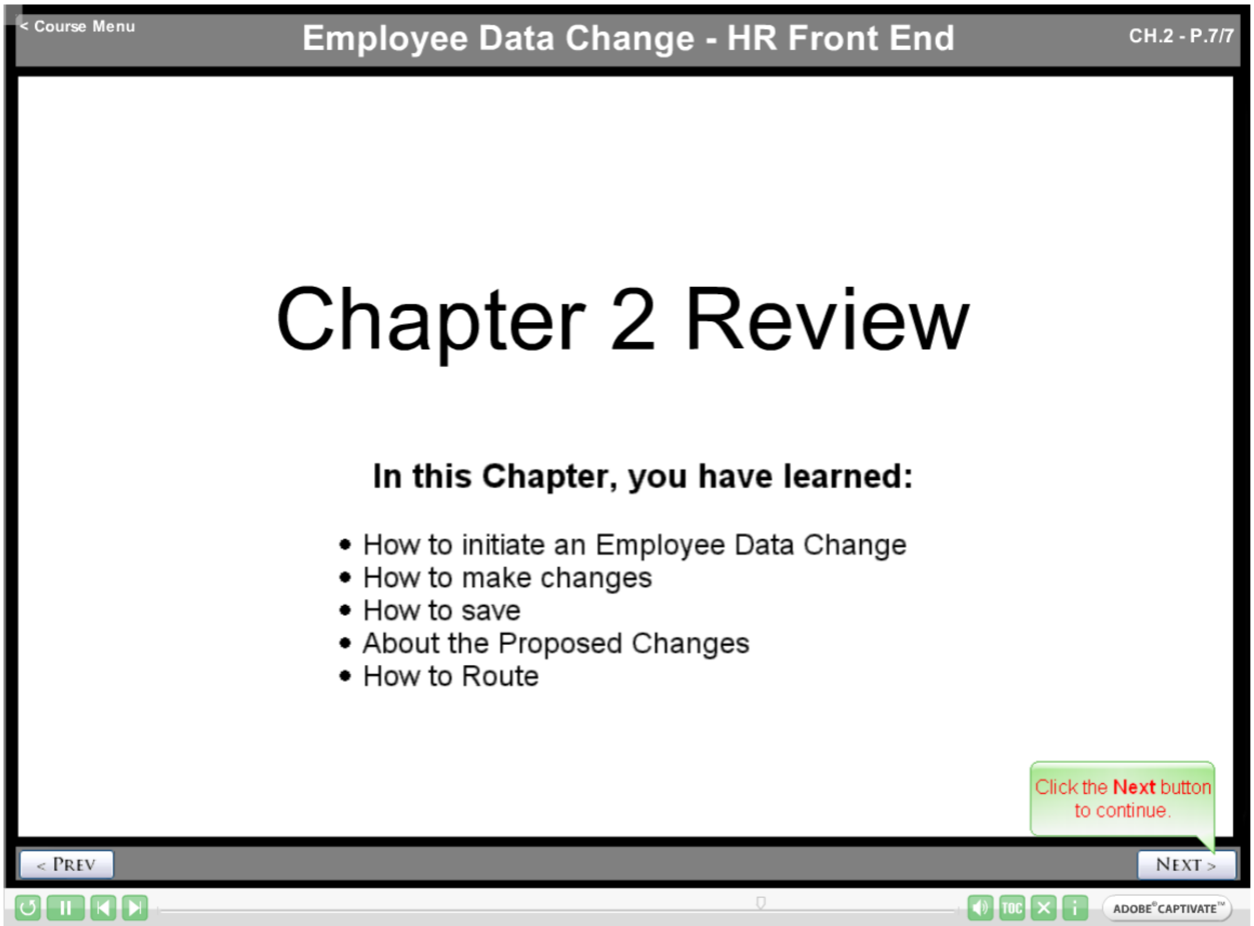
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Chapter 2 Review
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• How to save
• About the Proposed Changes
• How to Route
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You have reached the conclusion of the Employee Data Change Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the COMPLETE COURSE button below.
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