SYSTEM HUMAN RESOURCE SERVICES

Employee Group / Class Change
HR FRONT END TRAINING
HOW-TO GUIDE

URBANA-CHAMPAIGN
CHICAGO
SPRINGFIELD
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UIS
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 Group / Class Change
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 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 Compensable 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

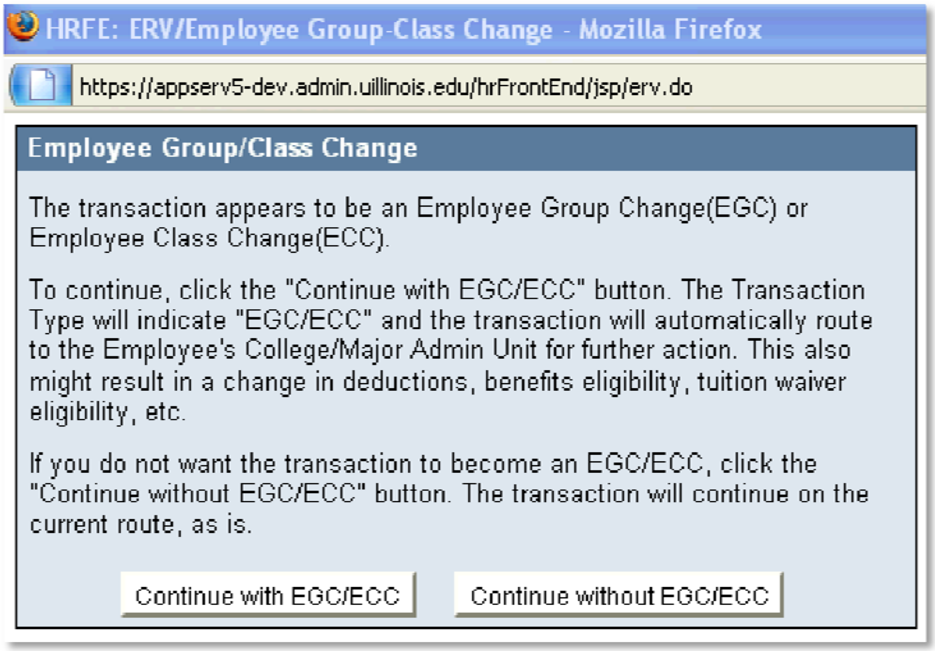
An Employee Group/Class Change occurs to a transaction at the final review stop (the last stop prior to the Apply Stop). The HR Front End will check the conditions of the transaction, and if the change meets the qualifications of the Employee Group/Class Change, an informational message is displayed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


HRFE: ERV/Employee Group-Class Change - Mozilla Firefox
https://appserv5-dev.admin.uillinois.edu/hrFrontEnd/jsp/erv.do

Employee Group/Class Change

The transaction appears to be an Employee Group Change(EGC) or Employee Class Change(ECC).

To continue, click the "Continue with EGC/ECC" button. The Transaction Type will indicate "EGC/ECC" and the transaction will automatically route to the Employee's College/Major Admin Unit for further action. This also might result in a change in deductions, benefits eligibility, tuition waiver eligibility, etc.

If you do not want the transaction to become an EGC/ECC, click the "Continue without EGC/ECC" button. The transaction will continue on the current route, as is.

Continue with EGC/ECC
Continue without EGC/ECC

Figure 1: Employee Group/Class Change message

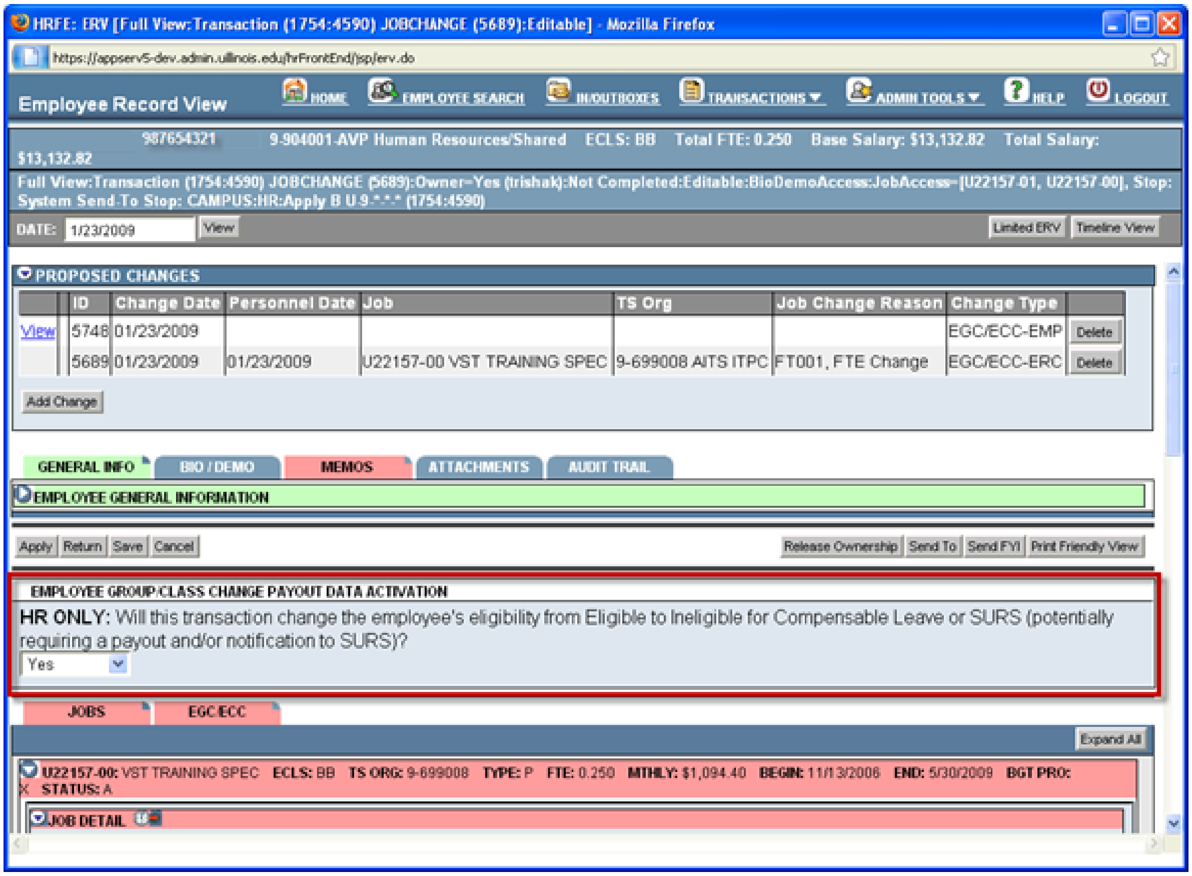
Employee Group / Class Change Payout Data Activation

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.


Employee Record View
HOME
EMPLOYEE SEARCH
IN/OUTBOXES
TRANSACTIONS
ADMIN TOOLS
HELP
LOGOUT
View
Limited ERV
Timeline View
Add Change
Delete
GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
Apply
Return
Save
Cancel
Release Ownership
Send To
Send FYI
Print Friendly View
JOBS
EGC/ECC
Expand All
JOB DETAIL

HRFE: ERV [Full View:Transaction (1754:4590) JOBCHANGE (5689):Editable] - Mozilla Firefox

https://appserv5-dev.admin.uillinois.edu/hrFrontEnd/jsp/erv.do

987654321 9-904001-AVP Human Resources/Shared ECLS: BB Total FTE: 0.250 Base Salary: $13,132.82 Total Salary: $13,132.82

Full View:Transaction (1754:4590) JOBCHANGE (5689):Owner=Yes (trishak):Not Completed:Editable:BioDemoAccess:JobAccess=[U22157-01, U22157-00], Stop: System Send-To Stop: CAMPUS:HR:Apply B U-9-*-*-* (1754:4590)

DATE: 1/23/2009

PROPOSED CHANGES

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	
View	5748	01/23/2009					EGC/ECC-EMP	Delete
	5689	01/23/2009	01/23/2009	U22157-00 VST TRAINING SPEC	9-699008 AITS ITPC	FT001, FTE Change	EGC/ECC-ERC	Delete

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

U22157-00: VST TRAINING SPEC ECLS: BB TS ORG: 9-699008 TYPE: P FTE: 0.250 MTHLY: $1,094.40 BEGIN: 11/13/2006 END: 5/30/2009 BGT PRO: X STATUS: A

Figure 2: Employee Group/Class Change Payout Data Activation

Post-Apply Process / Payout Process

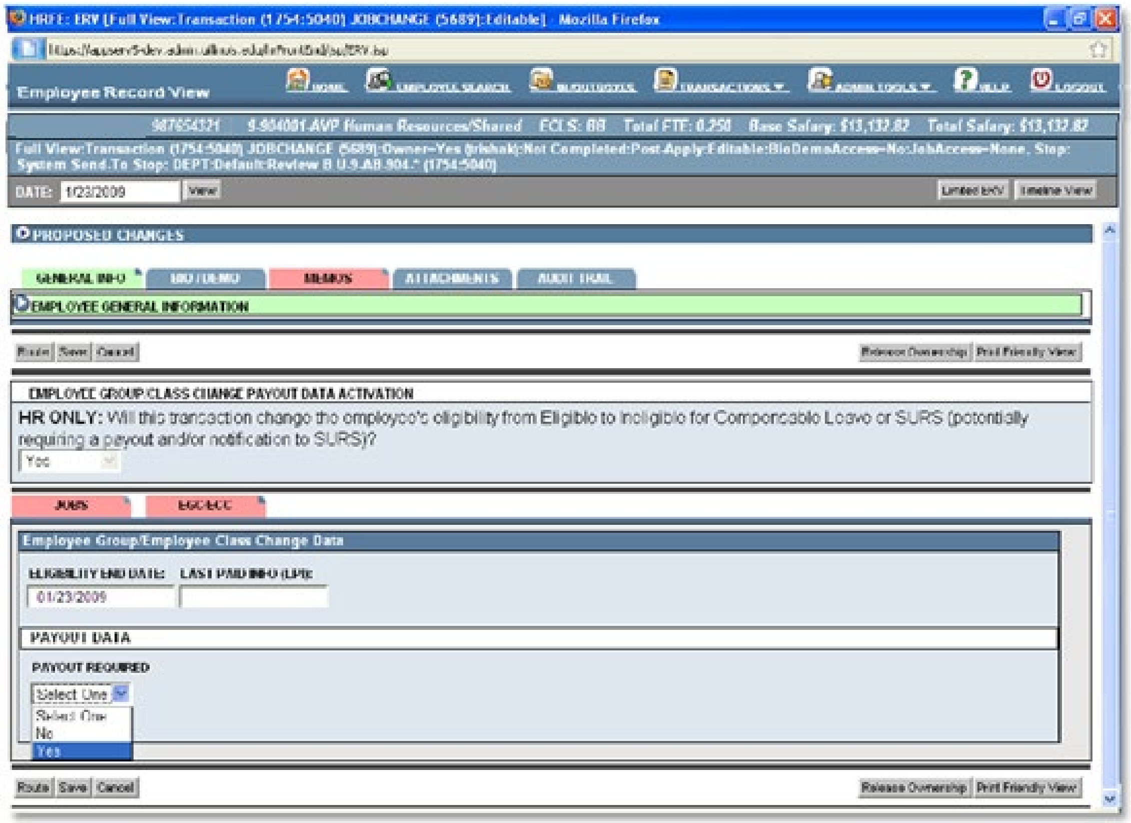
If yes is selected for the Payout Data Activation question, the transaction will be applied to Banner, then the post-apply routing will send the transaction to the Home Department's Group Inbox. While the HR Front End assists in calculating a potential payout, the actual payout is performed outside the 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.
   - If **No** is selected, click the **Route** button. *Transaction is routed.*
   - If **Yes** is selected, Payout Screen appears


HRFE: ERV [Full View:Transaction (1754:5040) JOBCHANGE (5689):Editable] - Mozilla Firefox
Employee Record View
HOME
EMPLOYEE SEARCH
BUDGETTOOLS
TRANSACTIONS
ADMIN TOOLS
HELP
LOGOUT
View
Limited ERV
Timeline View
PROPOSED CHANGES
GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
Route
Save
Cancel
Release Ownership
Print Friendly View
JOBS
EGC/ECC
Select One
No
Yes

987654321 9-904001 AVP Human Resources/Shared ECLS: BB Total FTE: 0.250 Base Salary: $13,132.82 Total Salary: $13,132.82

Full View:Transaction (1754:5040) JOBCHANGE (5689):Owner=Yes (trishak):Not Completed:Post Apply:Editable:BioDemoAccess=No:JobAccess=None, Stop: System Send.To Stop: DEPT:Default:Review B U.9.AB.904.* (1754:5040)

DATE: 1/23/2009

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)? Yes

Employee Group/Employee Class Change Data

ELIGIBILITY END DATE: 01/23/2009

LAST PAID INFO (LPI):

PAYOUT DATA

PAYOUT REQUIRED: Select One

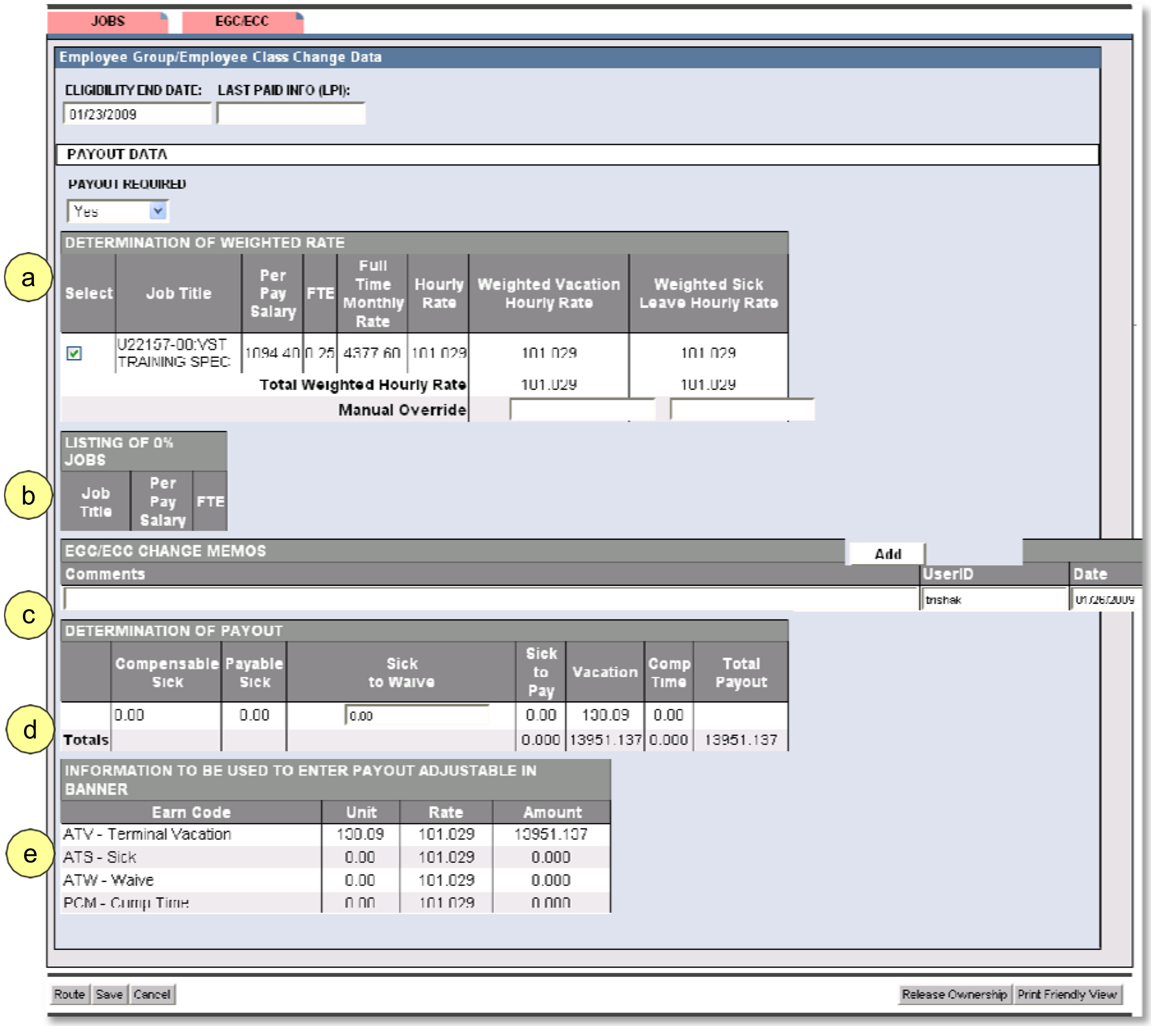
Figure 3: Employee Group/Class Change tab

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.



Employee Group/Employee Class Change Data

ELIGIBILITY END DATE: 01/23/2009

LAST PAID INFO (LPI):

PAYOUT DATA

PAYOUT REQUIRED: Yes

DETERMINATION OF WEIGHTED RATE

Select	Job Title	Per Pay Salary	FTE	Full Time Monthly Rate	Hourly Rate	Weighted Vacation Hourly Rate	Weighted Sick Leave Hourly Rate
☑	U22157-00:VST TRAINING SPEC	1094.40	0.25	4377.60	101.029	101.029	101.029
					Total Weighted Hourly Rate	101.029	101.029
					Manual Override		

LISTING OF 0% JOBS

Job Title	Per Pay Salary	FTE

EGC/ECC CHANGE MEMOS

Comments	UserID	Date
	tnshak	01/26/2009

DETERMINATION OF PAYOUT

	Compensable Sick	Payable Sick	Sick to Waive	Sick to Pay	Vacation	Comp Time	Total Payout
	0.00	0.00	0.00	0.00	130.09	0.00	
Totals				0.000	13951.137	0.000	13951.137

INFORMATION TO BE USED TO ENTER PAYOUT ADJUSTABLE IN BANNER

Earn Code	Unit	Rate	Amount
ATV - Terminal Vacation	130.09	101.029	13951.137
ATS - Sick	0.00	101.029	0.000
ATW - Waive	0.00	101.029	0.000
PCM - Comp Time	0.00	101.029	0.000

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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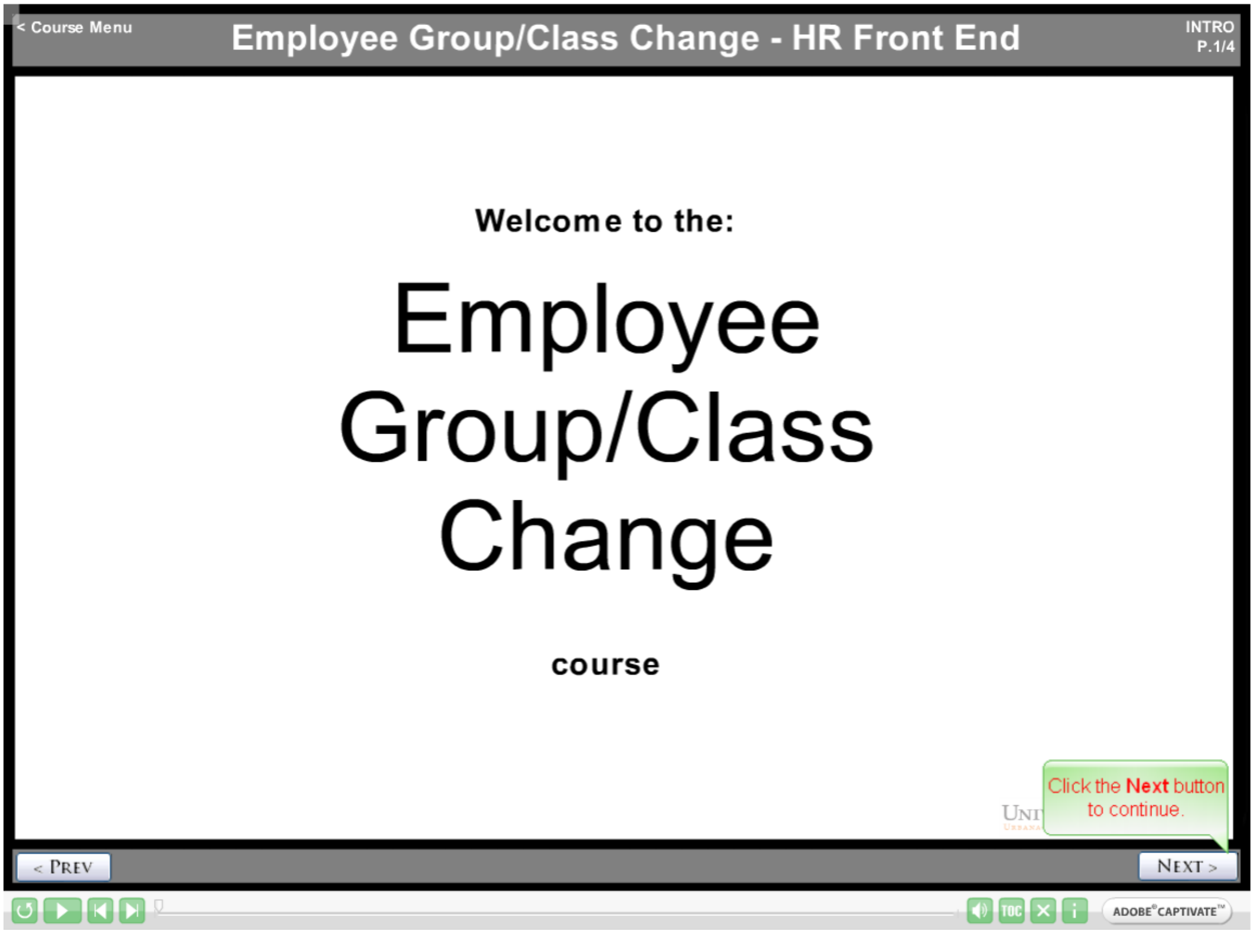
Appendix A: Screenshots from HRFE Video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Welcome to the:

Employee Group/Class Change

course

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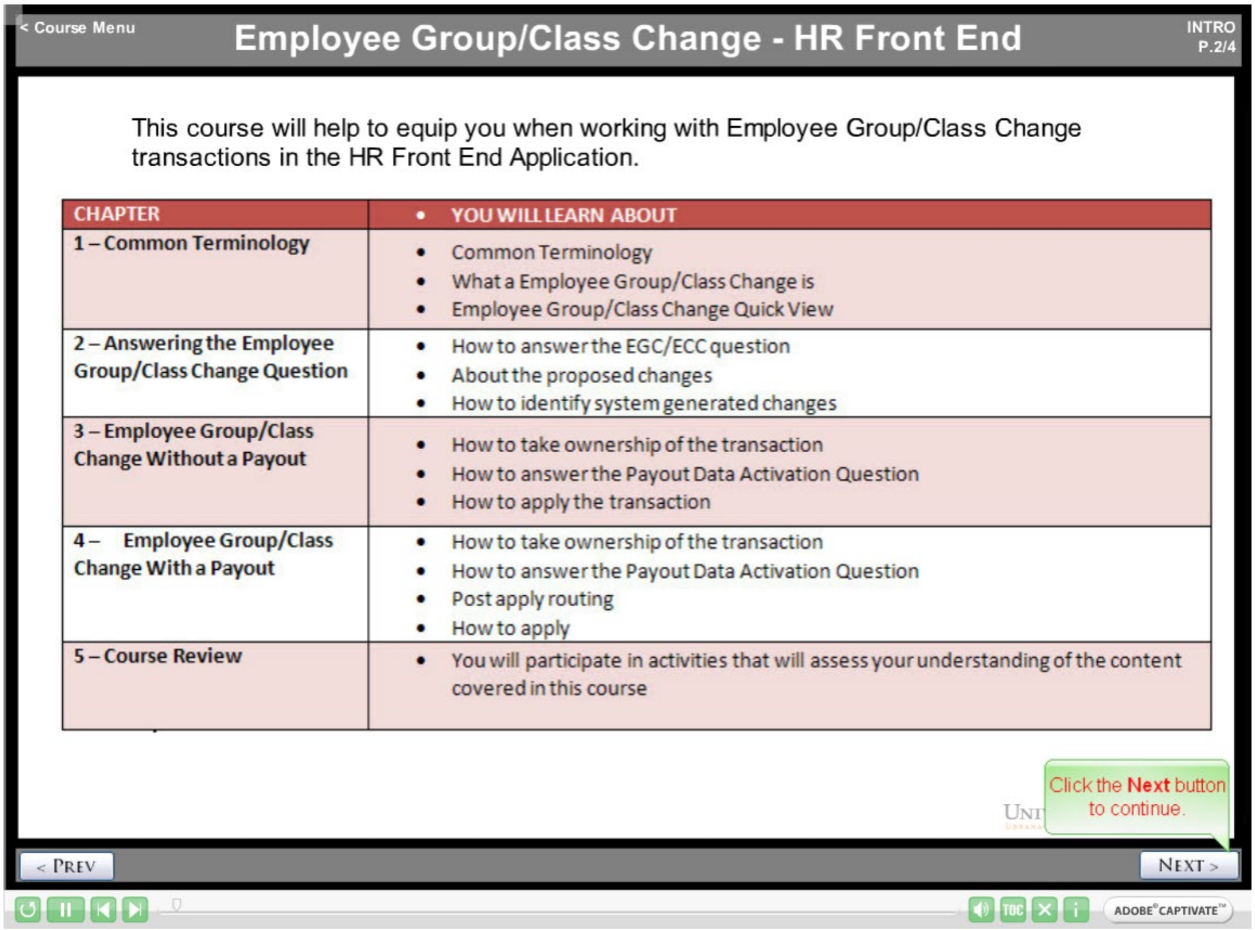
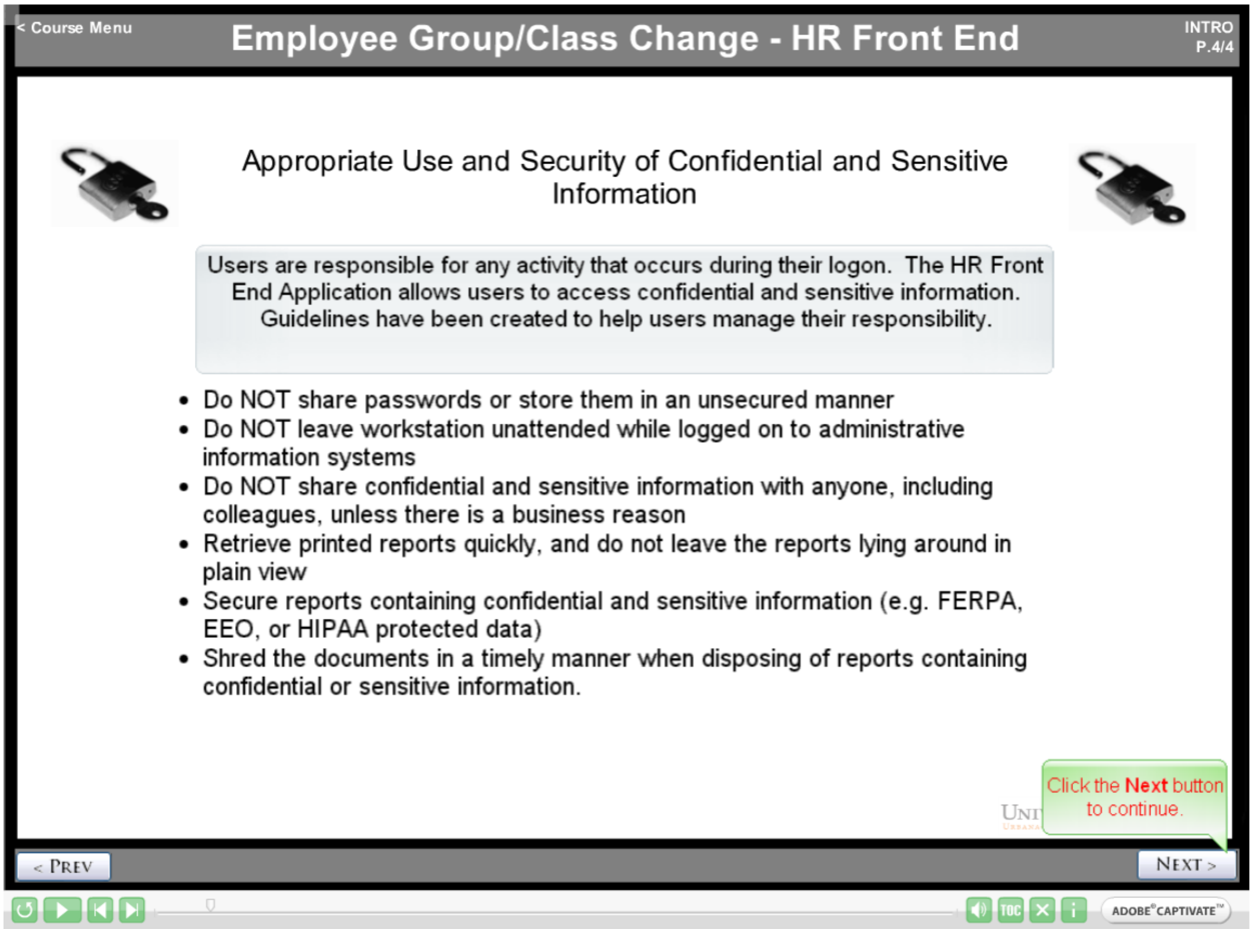


Employee Group/Class Change - HR Front End

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

CHAPTER	• YOU WILL LEARN ABOUT
1 – Common Terminology	• Common Terminology • What a Employee Group/Class Change is • Employee Group/Class Change Quick View
2 – Answering the Employee Group/Class Change Question	• How to answer the EGC/ECC question • About the proposed changes • How to identify system generated changes
3 – Employee Group/Class Change Without a Payout	• How to take ownership of the transaction • How to answer the Payout Data Activation Question • How to apply the transaction
4 – Employee Group/Class Change With a Payout	• How to take ownership of the transaction • How to answer the Payout Data Activation Question • Post apply routing • How to apply
5 – 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.



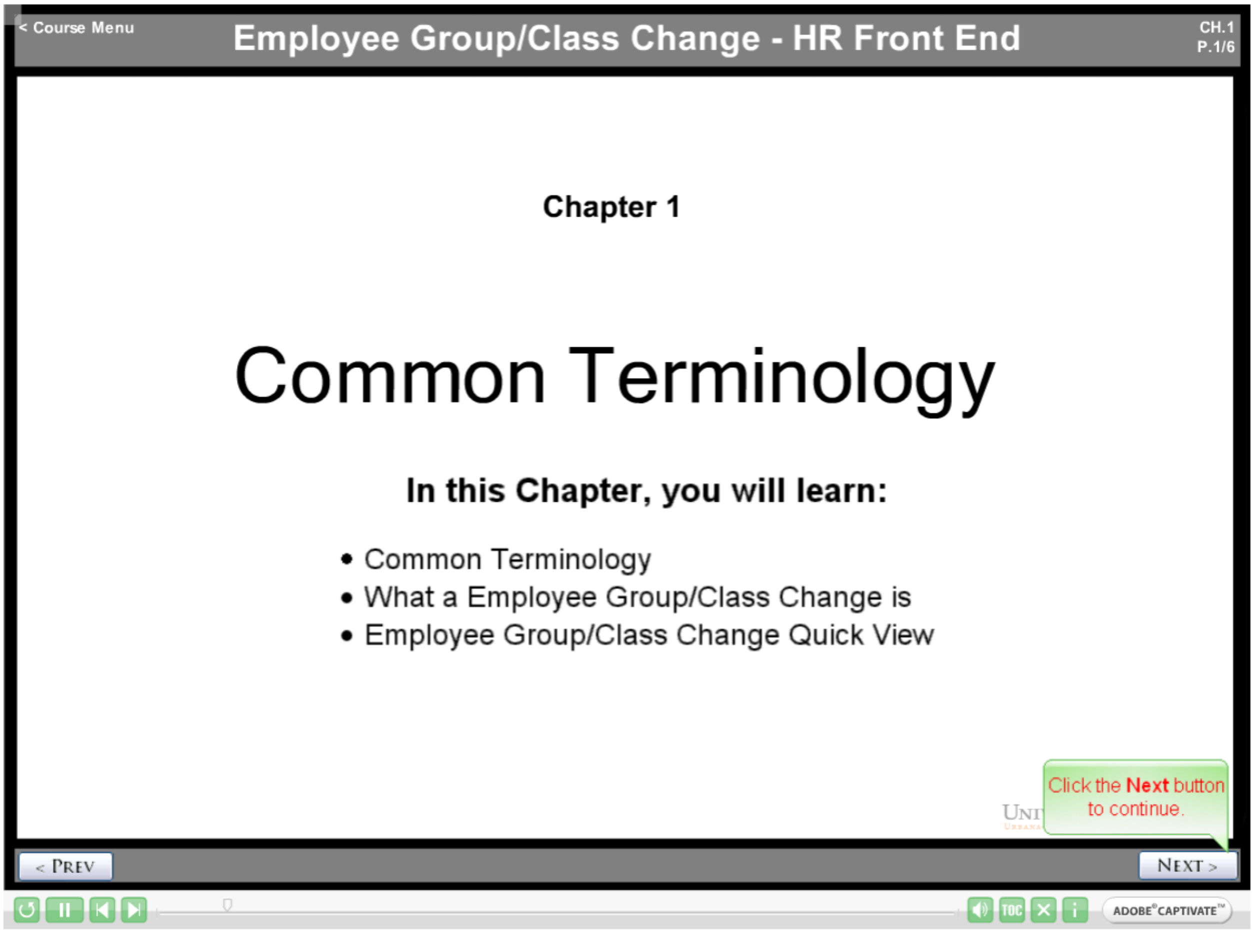
Employee Group/Class Change - HR Front End

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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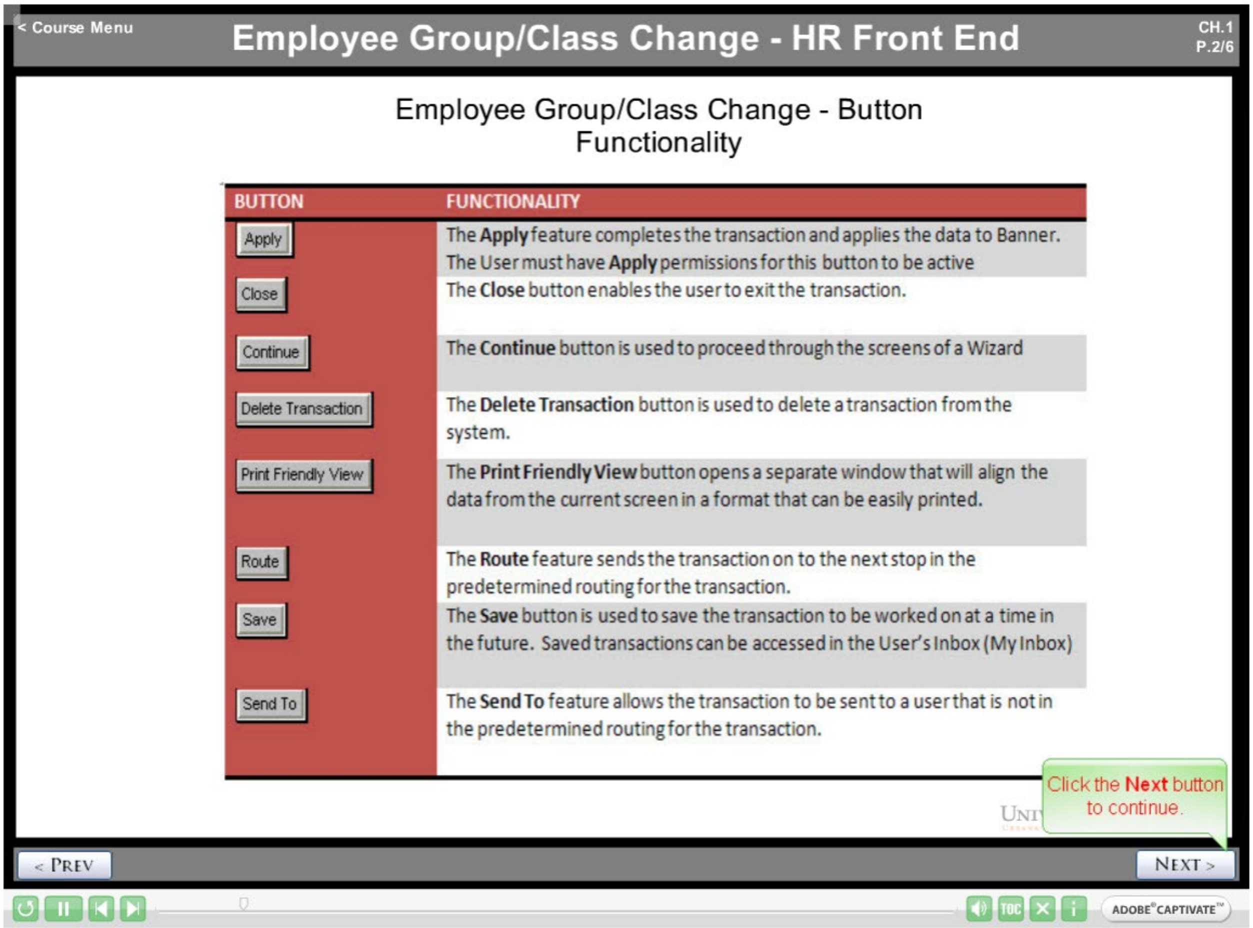
Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What a Employee Group/Class Change is
- Employee Group/Class Change Quick View

Click the **Next** button to continue.

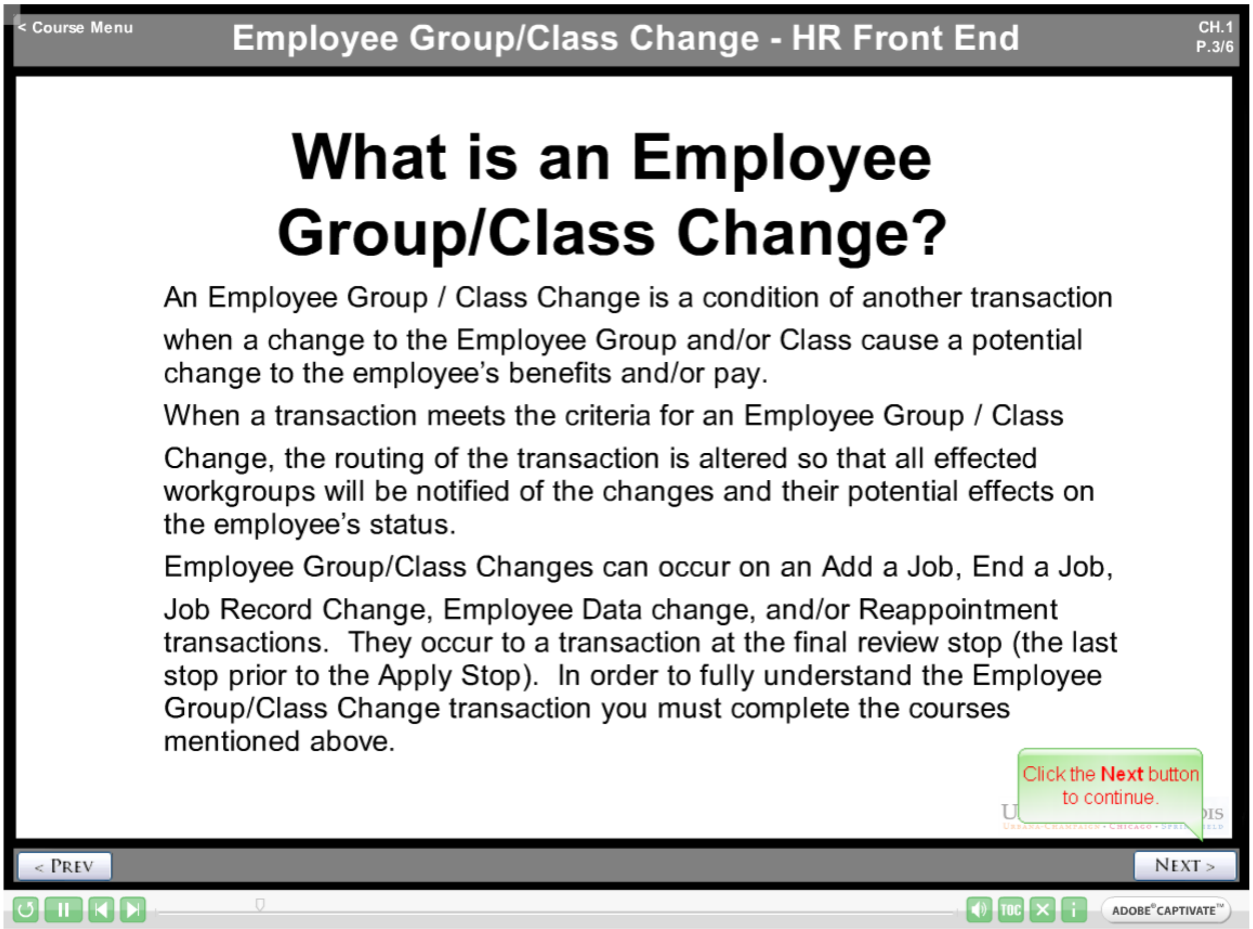


Employee Group/Class Change - HR Front End

Employee Group/Class 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.

Click the **Next** button to continue.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What is an Employee Group/Class Change?

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.

Employee Group/Class Changes can occur on an Add a Job, End a Job, Job Record Change, Employee Data change, and/or Reappointment transactions. They occur to a transaction at the final review stop (the last stop prior to the Apply Stop). In order to fully understand the Employee Group/Class Change transaction you must complete the courses mentioned above.

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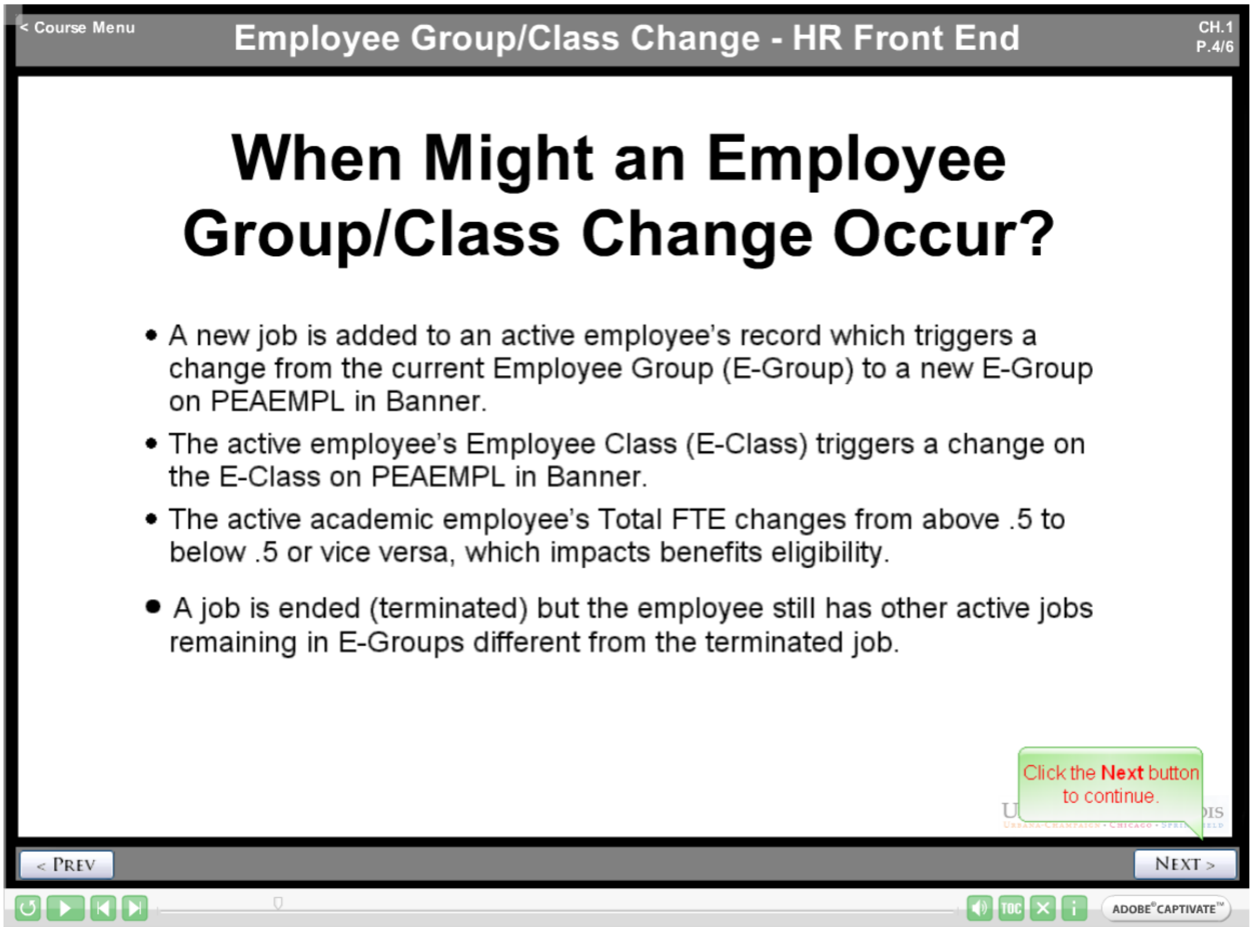

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When Might an Employee Group/Class Change Occur?

- 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 PEAEMPL 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.

Click the **Next** button to continue.

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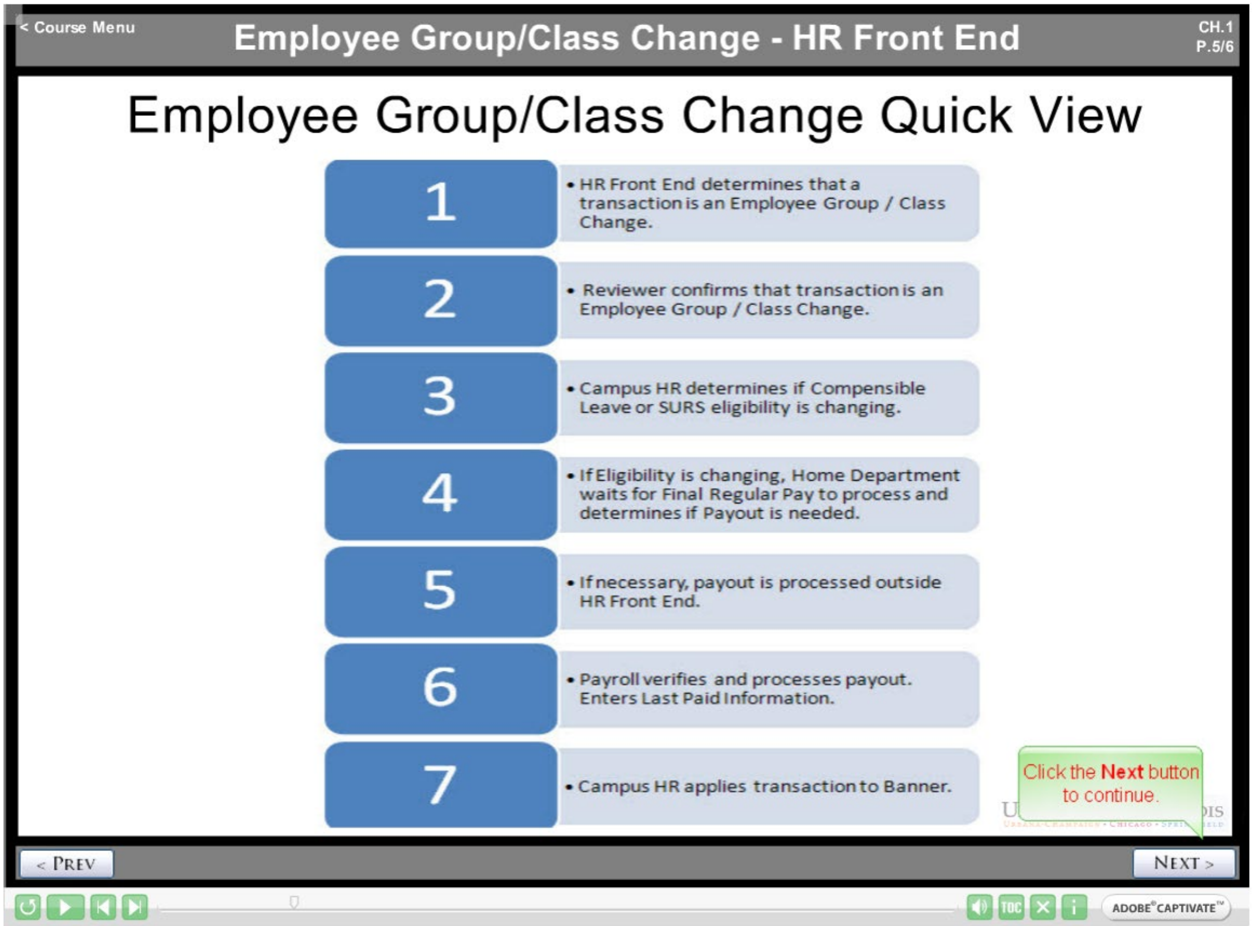
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Employee Group/Class Change Quick View

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.

Click the **Next** button to continue.

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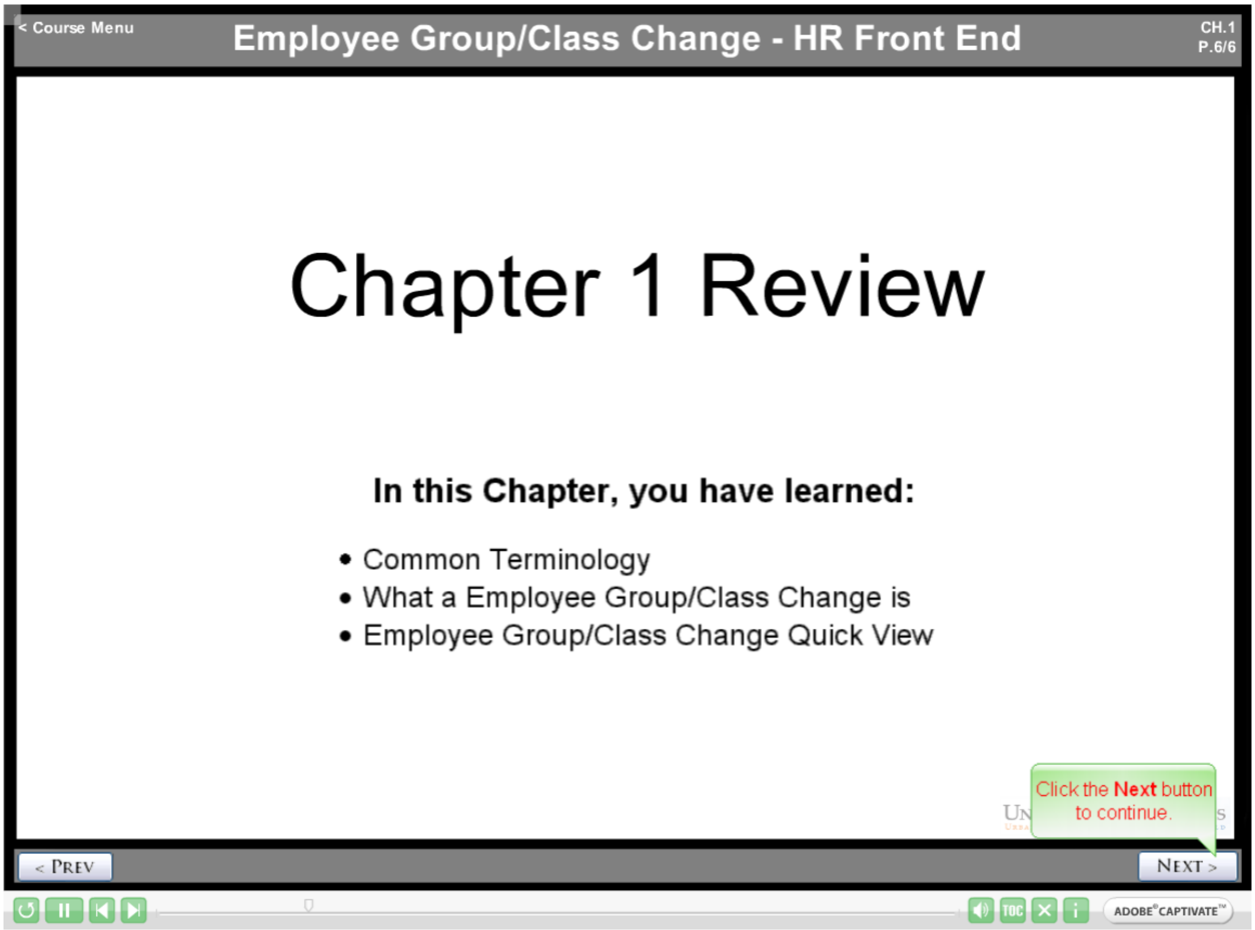

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Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What a Employee Group/Class Change is
- Employee Group/Class Change Quick View

Click the **Next** button to continue.

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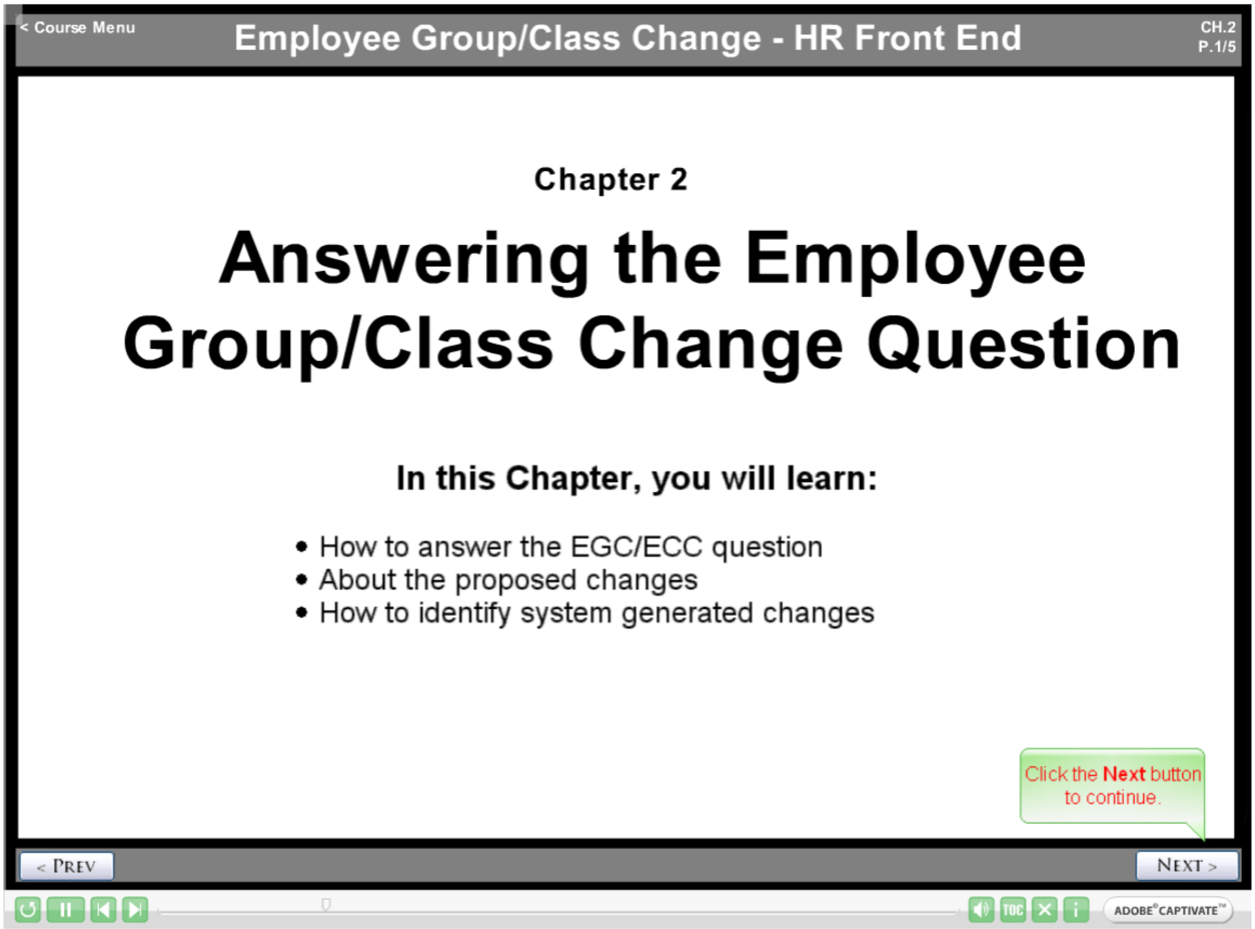

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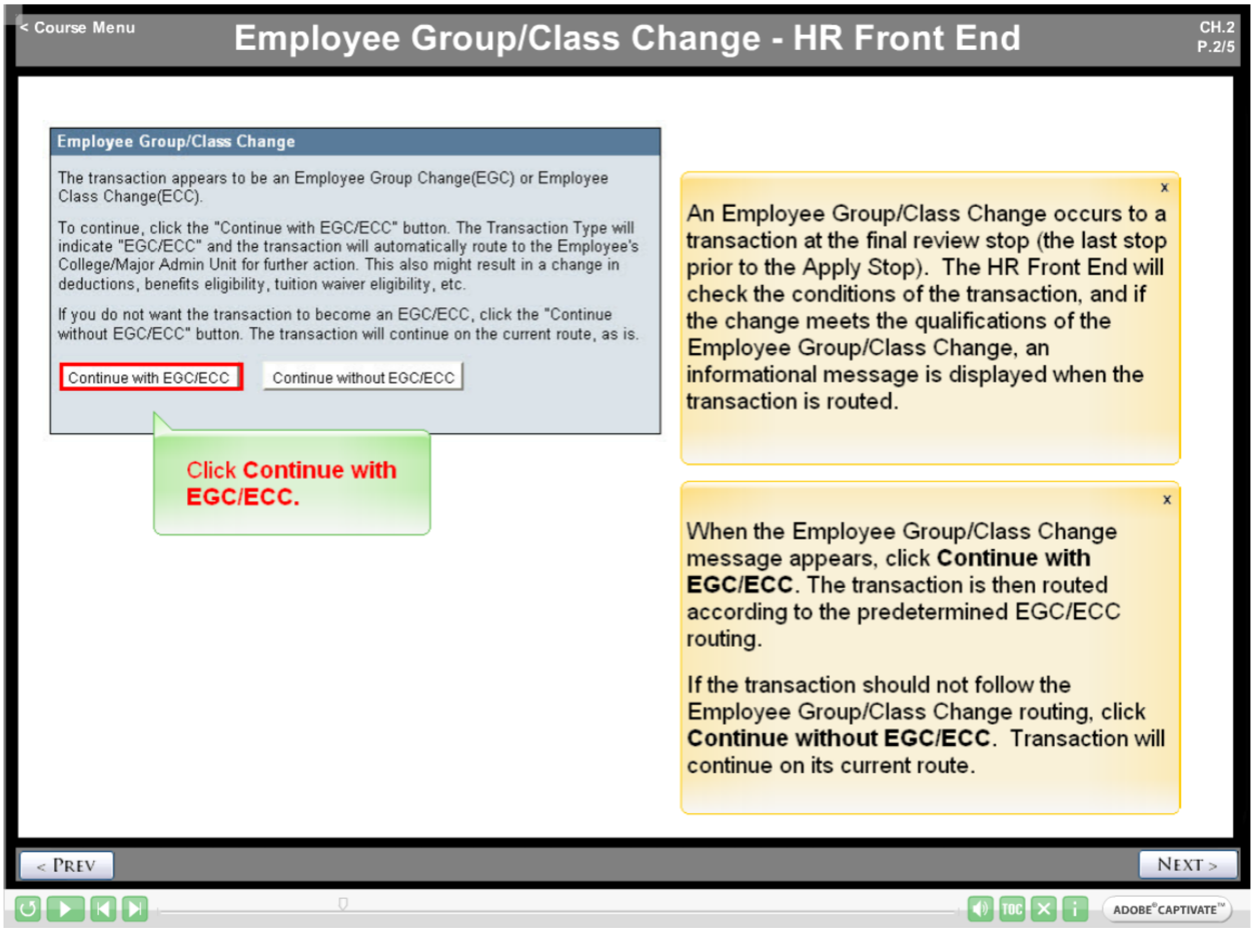
Chapter 2

Answering the Employee Group/Class Change Question

In this Chapter, you will learn:

- How to answer the EGC/ECC question
- About the proposed changes
- How to identify system generated changes

Click the **Next** button to continue.



Employee Group/Class Change - HR Front End

Employee Group/Class Change

The transaction appears to be an Employee Group Change(EGC) or Employee Class Change(ECC).

To continue, click the "Continue with EGC/ECC" button. The Transaction Type will indicate "EGC/ECC" and the transaction will automatically route to the Employee's College/Major Admin Unit for further action. This also might result in a change in deductions, benefits eligibility, tuition waiver eligibility, etc.

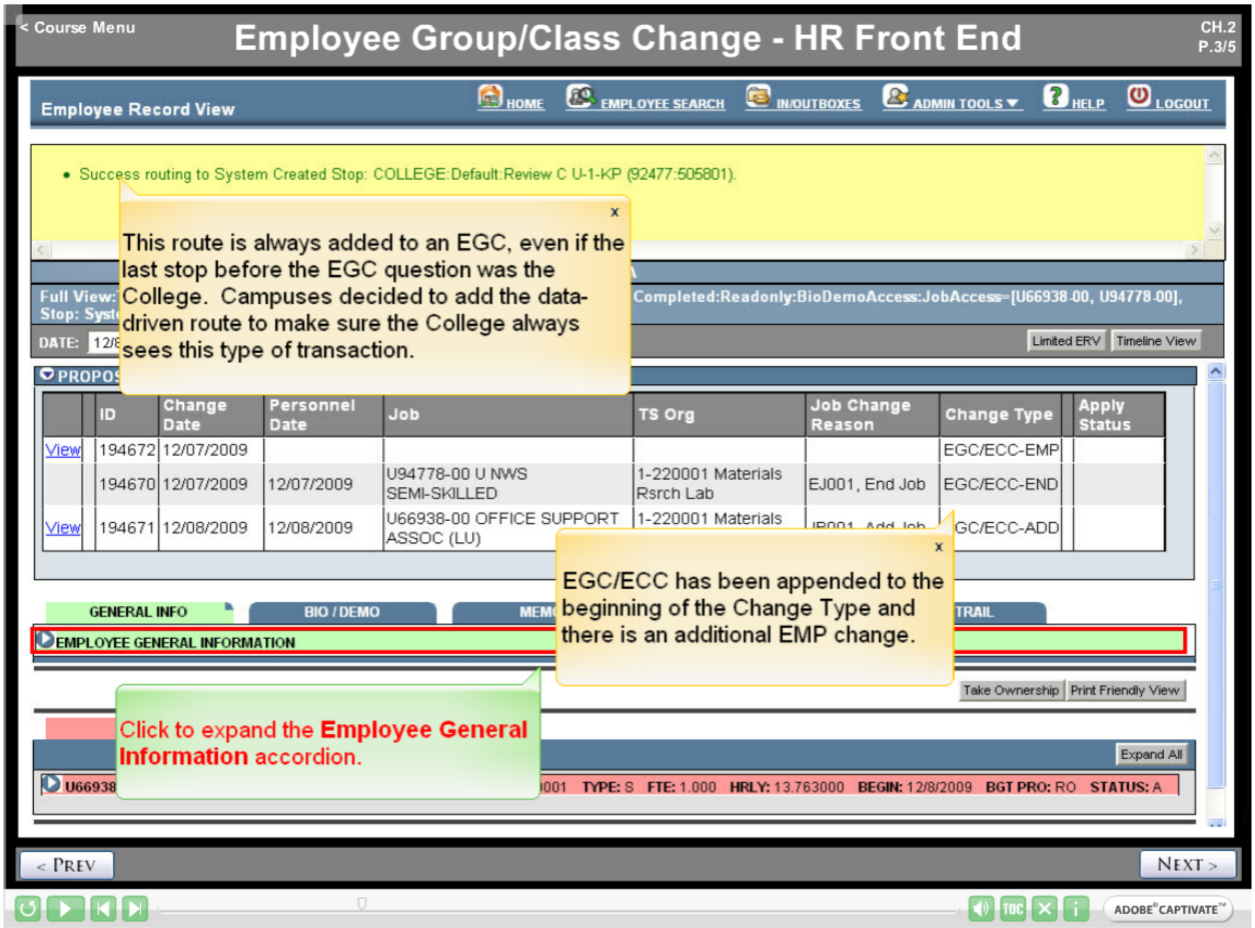
If you do not want the transaction to become an EGC/ECC, click the "Continue without EGC/ECC" button. The transaction will continue on the current route, as is.

Click **Continue with EGC/ECC.**

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.

When the Employee Group/Class Change message appears, click **Continue with EGC/ECC**. The transaction is then routed according to the predetermined EGC/ECC routing.

If the transaction should not follow the Employee Group/Class Change routing, click **Continue without EGC/ECC**. Transaction will continue on its current route.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MEM
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Employee Group/Class Change - HR Front End

- Success routing to System Created Stop: COLLEGE:Default:Review C U-1-KP (92477:505801).

This route is always added to an EGC, even if the last stop before the EGC question was the College. Campuses decided to add the data-driven route to make sure the College always sees this type of transaction.

Full View: Completed:Readonly:BioDemoAccess:JobAccess=[U66938-00, U94778-00],
Stop: Syst

DATE: 12/

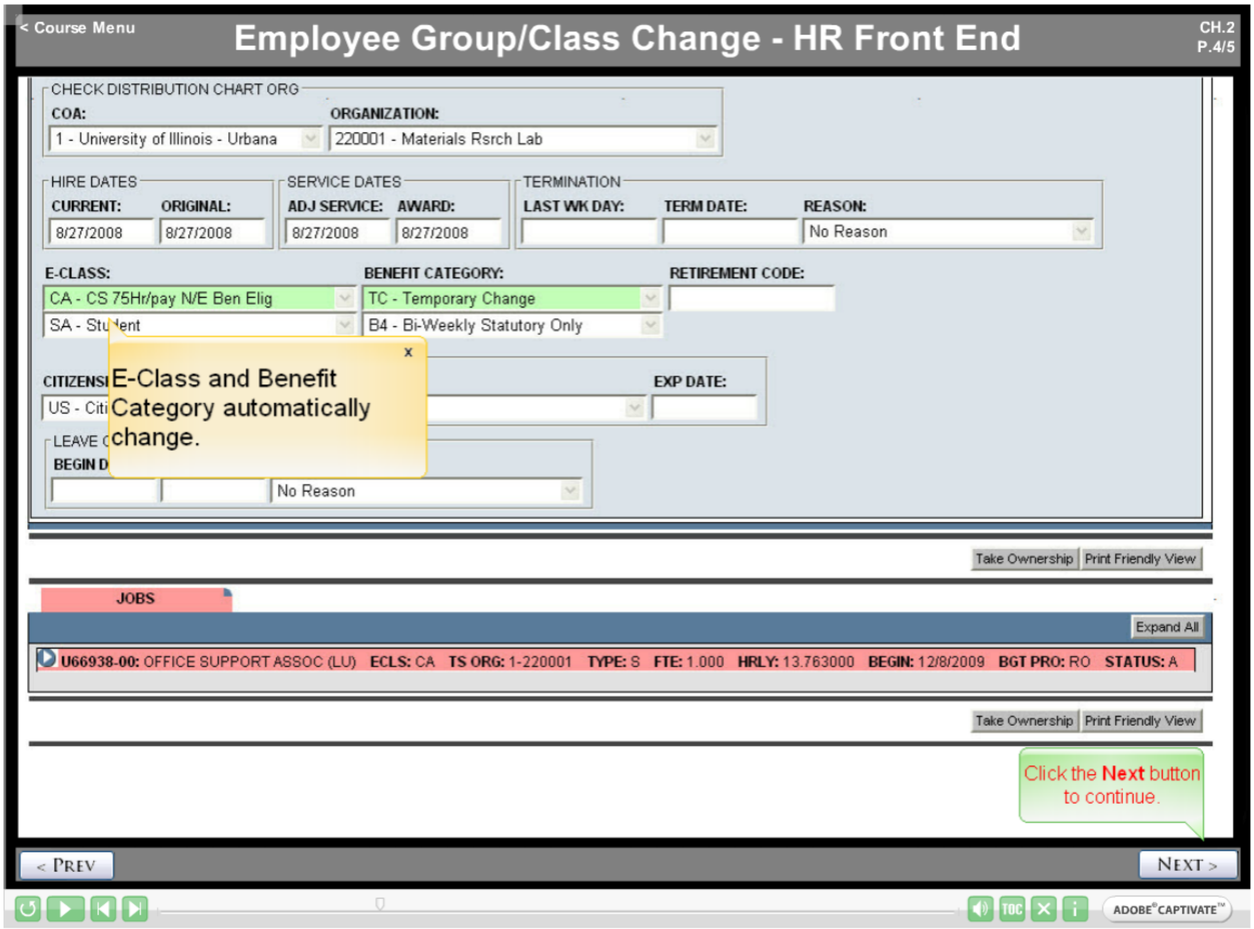
	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
View	194672	12/07/2009					EGC/ECC-EMP	
	194670	12/07/2009	12/07/2009	U94778-00 U NWS SEMI-SKILLED	1-220001 Materials Rsrch Lab	EJ001, End Job	EGC/ECC-END	
View	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials	JB001, Add Job	GC/ECC-ADD	

EGC/ECC has been appended to the beginning of the Change Type and there is an additional EMP change.

EMPLOYEE GENERAL INFORMATION

Click to expand the **Employee General Information** accordion.

U66938 001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A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Employee Group/Class Change - HR Front End

CHECK DISTRIBUTION CHART ORG
COA: 1 - University of Illinois - Urbana
ORGANIZATION: 220001 - Materials Rsrch Lab

HIRE DATES
CURRENT: 8/27/2008
ORIGINAL: 8/27/2008

SERVICE DATES
ADJ SERVICE: 8/27/2008
AWARD: 8/27/2008

TERMINATION
LAST WK DAY:
TERM DATE:
REASON: No Reason

E-CLASS: CA - CS 75Hr/pay N/E Ben Elig
SA - Student
BENEFIT CATEGORY: TC - Temporary Change
B4 - Bi-Weekly Statutory Only
RETIREMENT CODE:

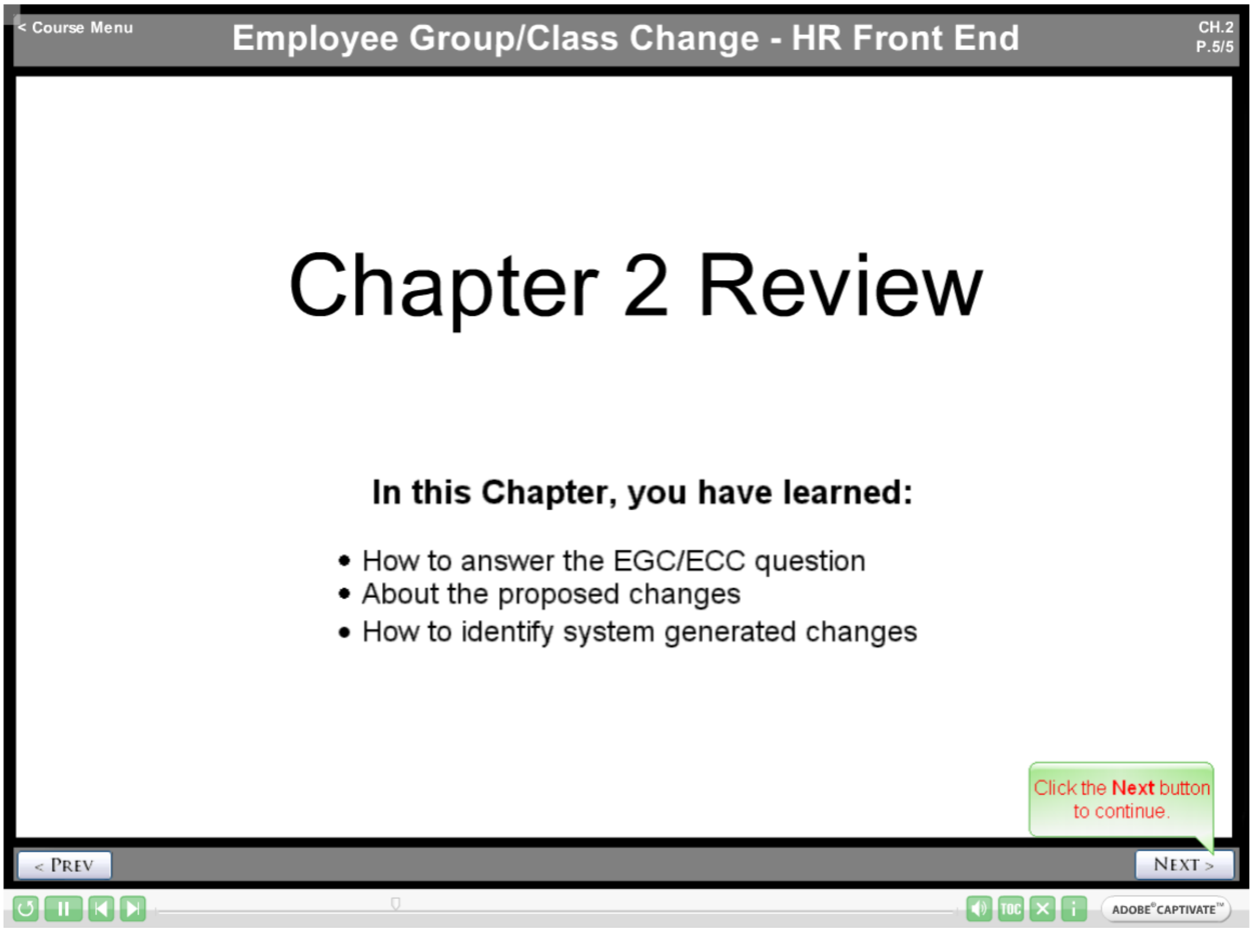
CITIZENSI
US - Citi
EXP DATE:

LEAVE (
BEGIN D
No Reason

E-Class and Benefit Category automatically change.

U66938-00: OFFICE SUPPORT ASSOC (LU) ECLS: CA TS ORG: 1-220001 TYPE: S FTE: 1.000 HRLY: 13.763000 BEGIN: 12/8/2009 BGT PRO: RO STATUS: A

Click the **Next** button to continue.



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Chapter 2 Review

In this Chapter, you have learned:

- How to answer the EGC/ECC question
- About the proposed changes
- How to identify system generated changes

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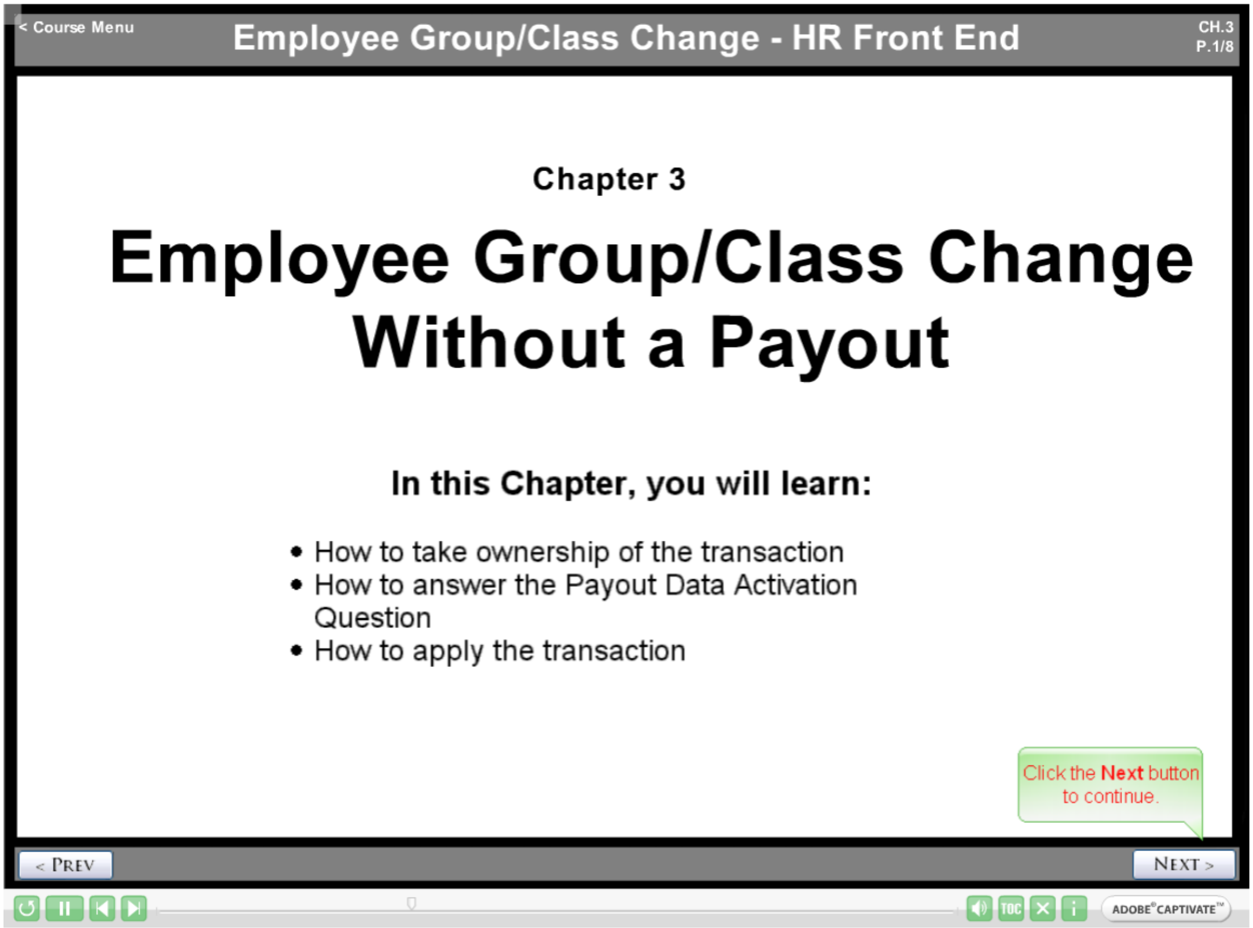

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Employee Group/Class Change - HR Front End

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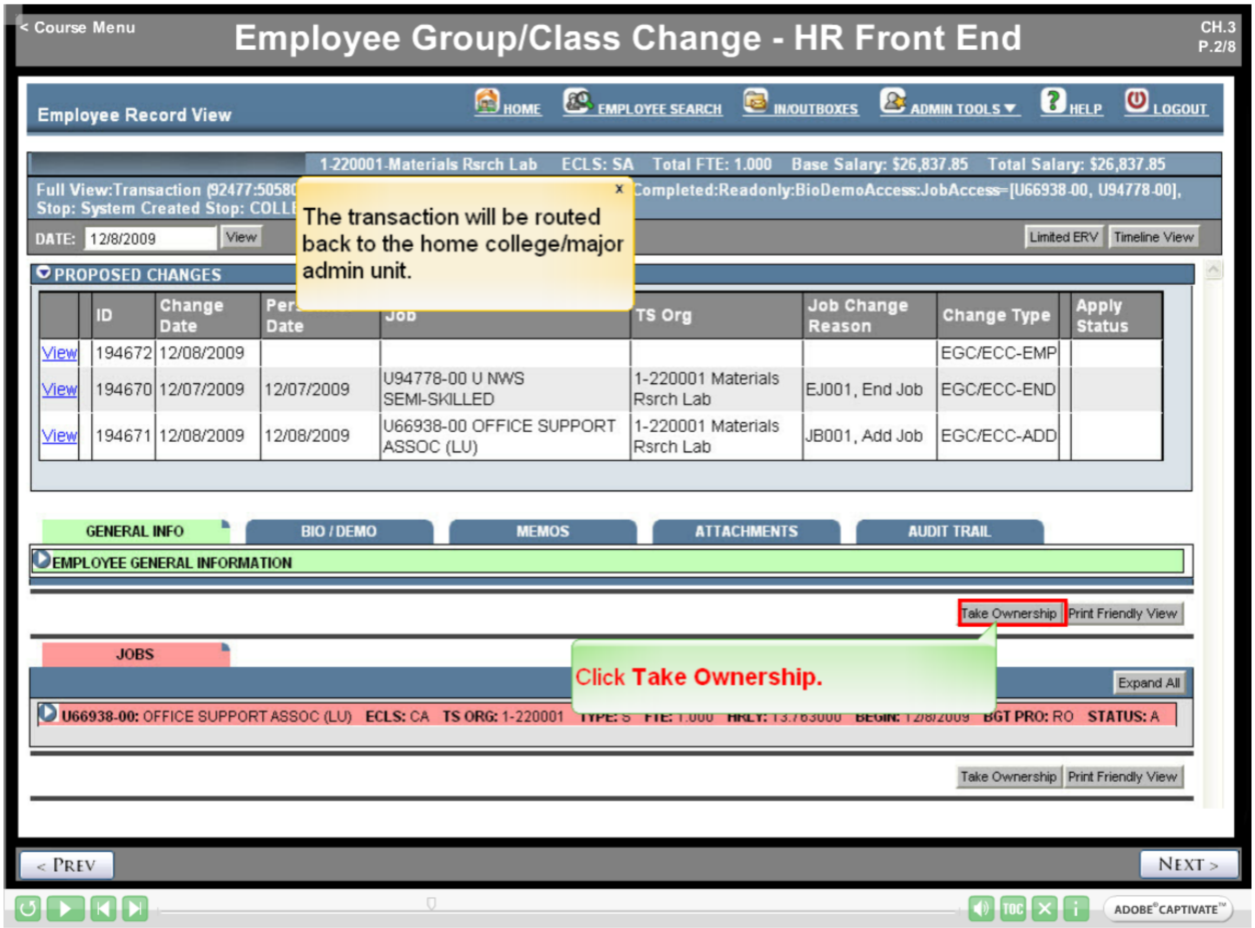
Chapter 3

Employee Group/Class Change Without a Payout

In this Chapter, you will learn:

- How to take ownership of the transaction
- How to answer the Payout Data Activation Question
- How to apply the transaction

Click the **Next** button to continue.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1-220001-Materials Rsrch Lab ECLS: SA Total FTE: 1.000 Base Salary: $26,837.85 Total Salary: $26,837.85

Full View:Transaction (92477:50580 … Completed:Readonly:BioDemoAccess:JobAccess=[U66938-00, U94778-00],
Stop: System Created Stop: COLLE

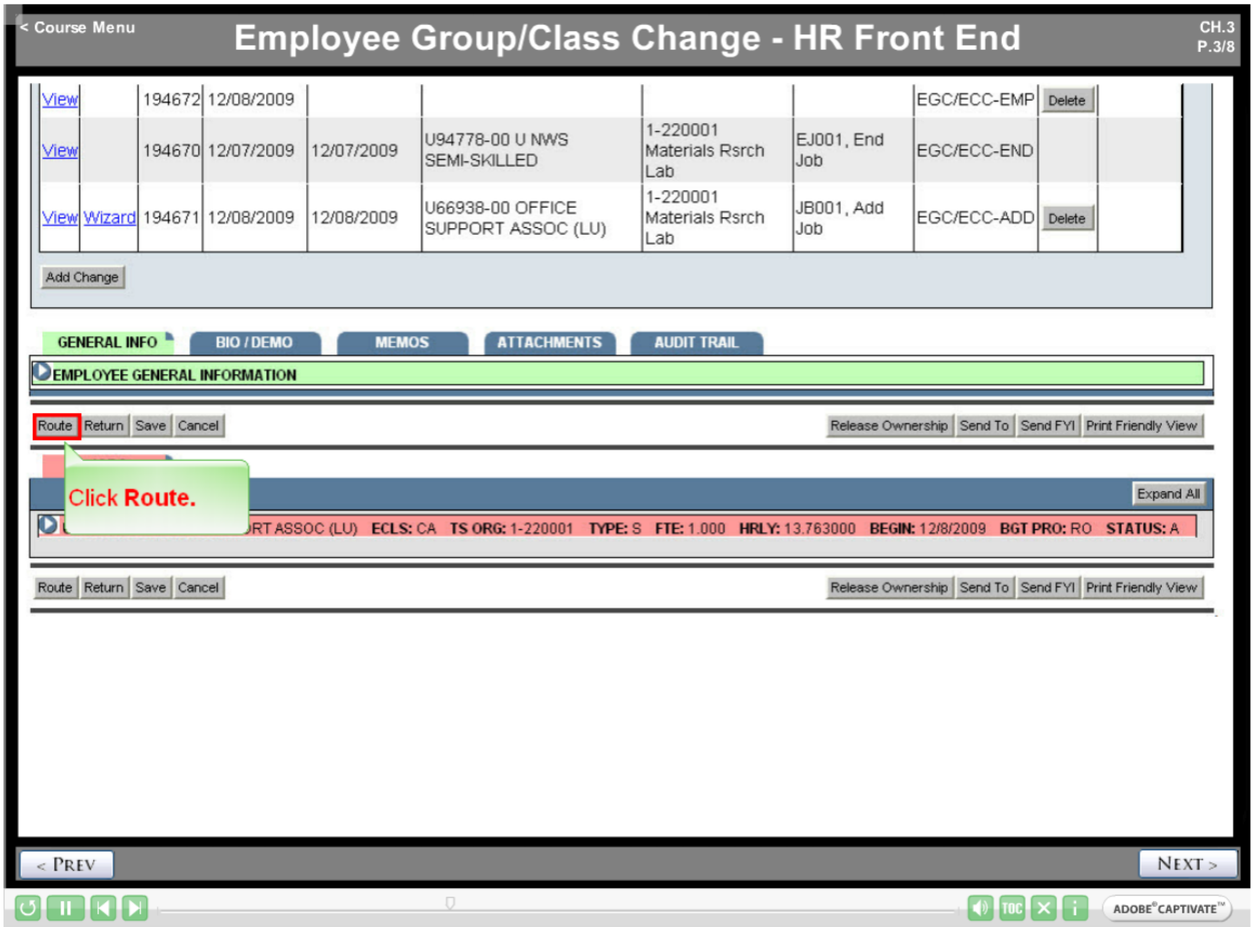
DATE: 12/8/2009

The transaction will be routed back to the home college/major admin unit.

	ID	Change Date	Per Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View	194672	12/08/2009					EGC/ECC-EMP		
View	194670	12/07/2009	12/07/2009	U94778-00 U NWS SEMI-SKILLED	1-220001 Materials Rsrch Lab	EJ001, End Job	EGC/ECC-END		
View	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD		

Click **Take Ownership.**

U66938-00: OFFICE SUPPORT ASSOC (LU) **ECLS:** CA **TS ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A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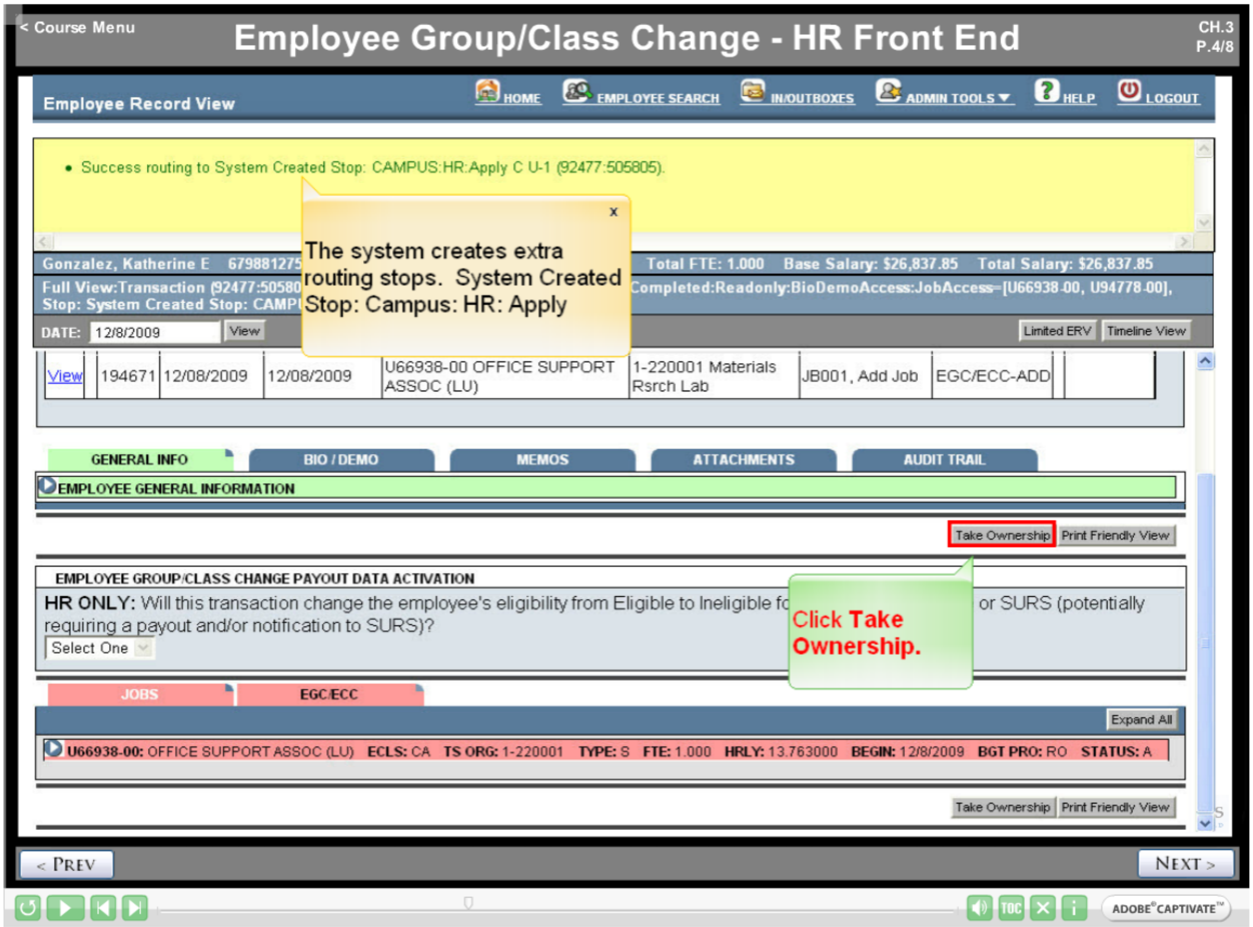
View		194670	12/07/2009	12/07/2009	U94778-00 U NWS SEMI-SKILLED	1-220001 Materials Rsrch Lab	EJ001, End Job	EGC/ECC-END	
View	Wizard	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD	Delete

EMPLOYEE GENERAL INFORMATION

Click **Route.**

RT ASSOC (LU) **ECLS:** CA **TS ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A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- Success routing to System Created Stop: CAMPUS:HR:Apply C U-1 (92477:505805).

The system creates extra routing stops. System Created Stop: Campus: HR: Apply

Gonzalez, Katherine E 679881275 … Total FTE: 1.000 Base Salary: $26,837.85 Total Salary: $26,837.85

Full View:Transaction (92477:50580 … Completed:Readonly:BioDemoAccess:JobAccess=[U66938-00, U94778-00], Stop: System Created Stop: CAMP…

DATE: 12/8/2009

View	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD

EMPLOYEE GENERAL INFORMATION

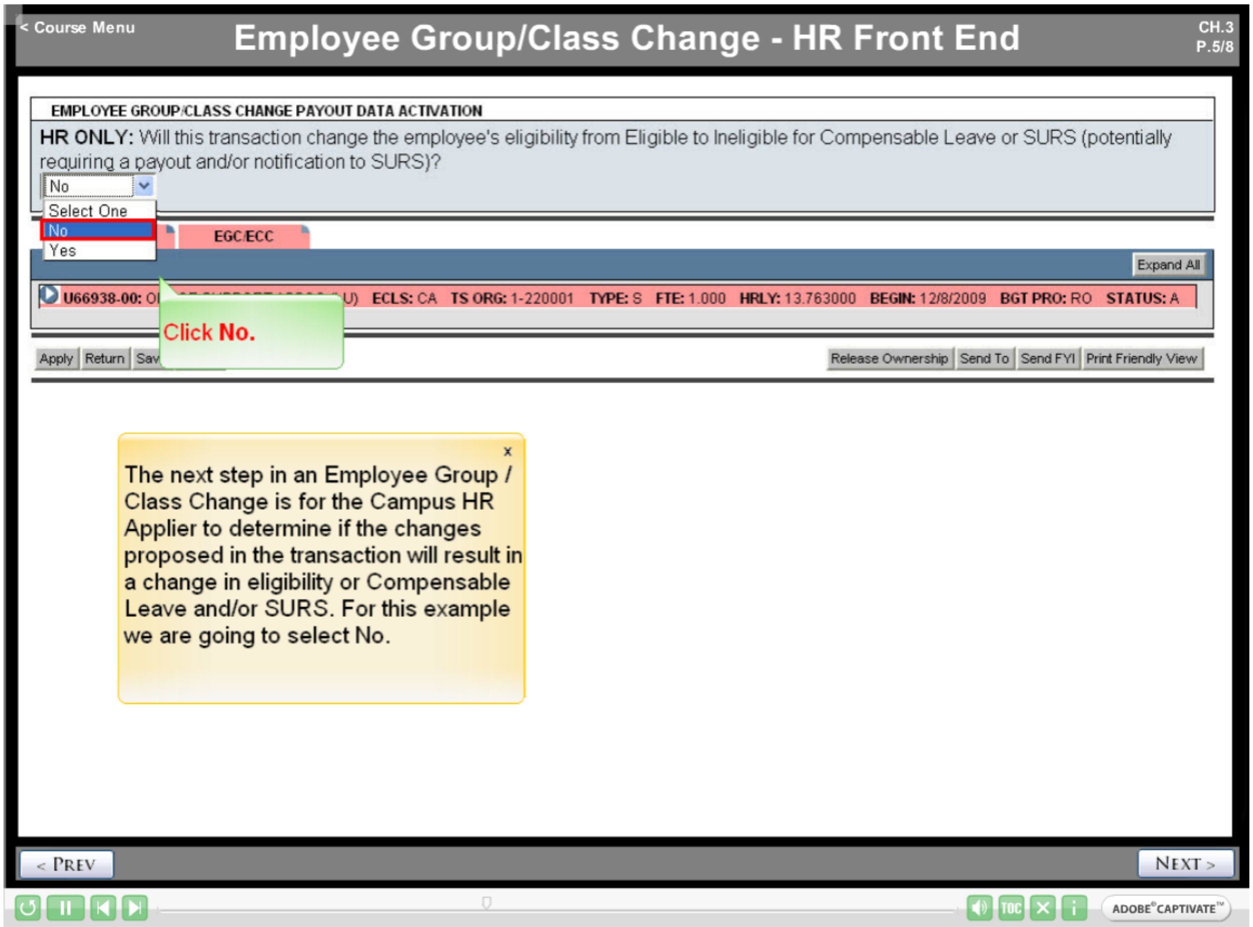
EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible fo… or SURS (potentially requiring a payout and/or notification to SURS)?

Select One

Click Take Ownership.

U66938-00: OFFICE SUPPORT ASSOC (LU) **ECLS:** CA **TS ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A



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Select One
No
Yes
EGC/ECC
Expand All
U66938-00: O
U) ECLS: CA TS ORG: 1-220001 TYPE: S FTE: 1.000 HRLY: 13.763000 BEGIN: 12/8/2009 BGT PRO: RO STATUS: A
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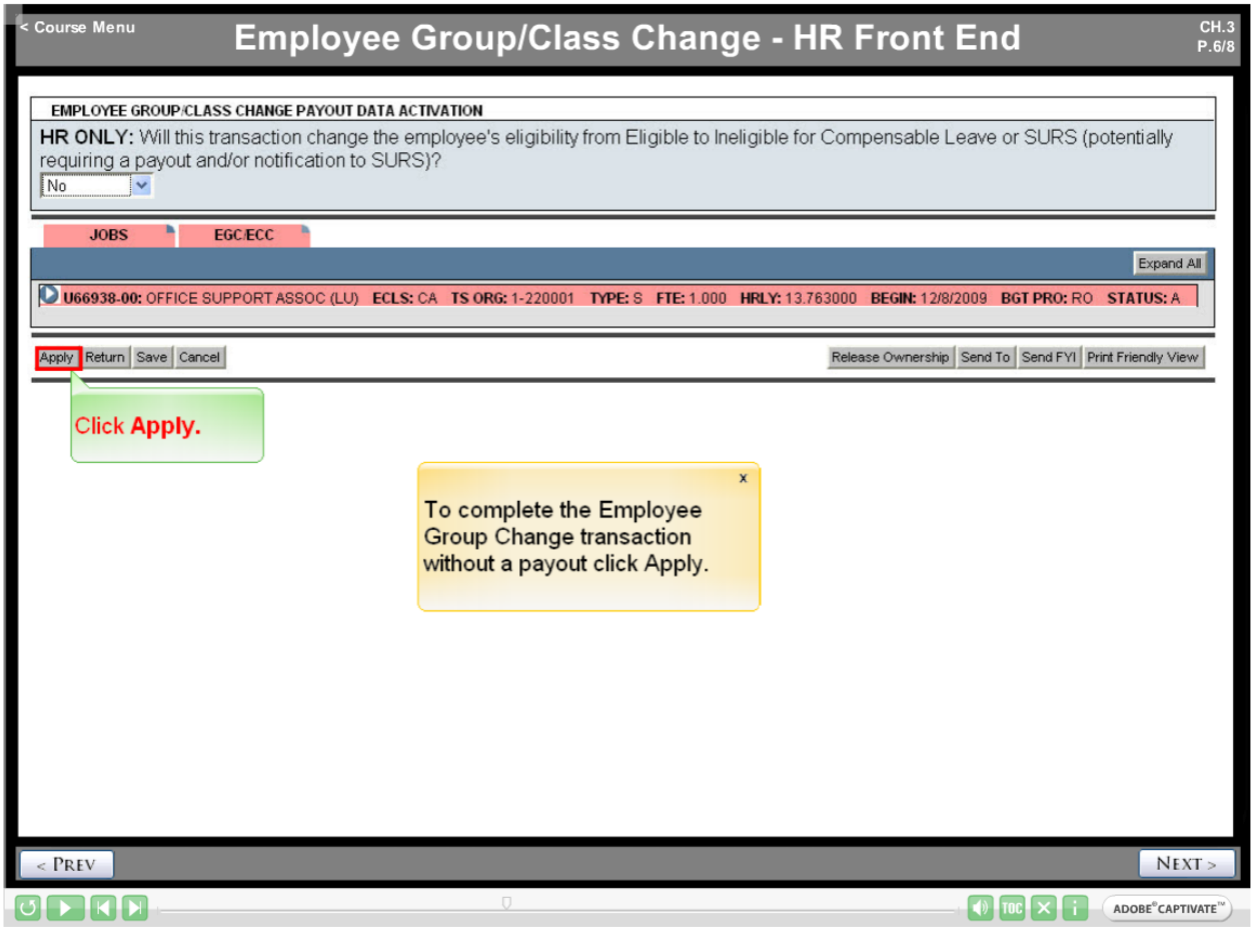
EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

No

Click **No.**

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 or Compensable Leave and/or SURS. For this example we are going to select No.



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EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

No

JOBS
EGC/ECC
Expand All

U66938-00: OFFICE SUPPORT ASSOC (LU) **ECLS:** CA **TS ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A

Apply
Return
Save
Cancel
Release Ownership
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Click **Apply.**

To complete the Employee Group Change transaction without a payout click Apply.

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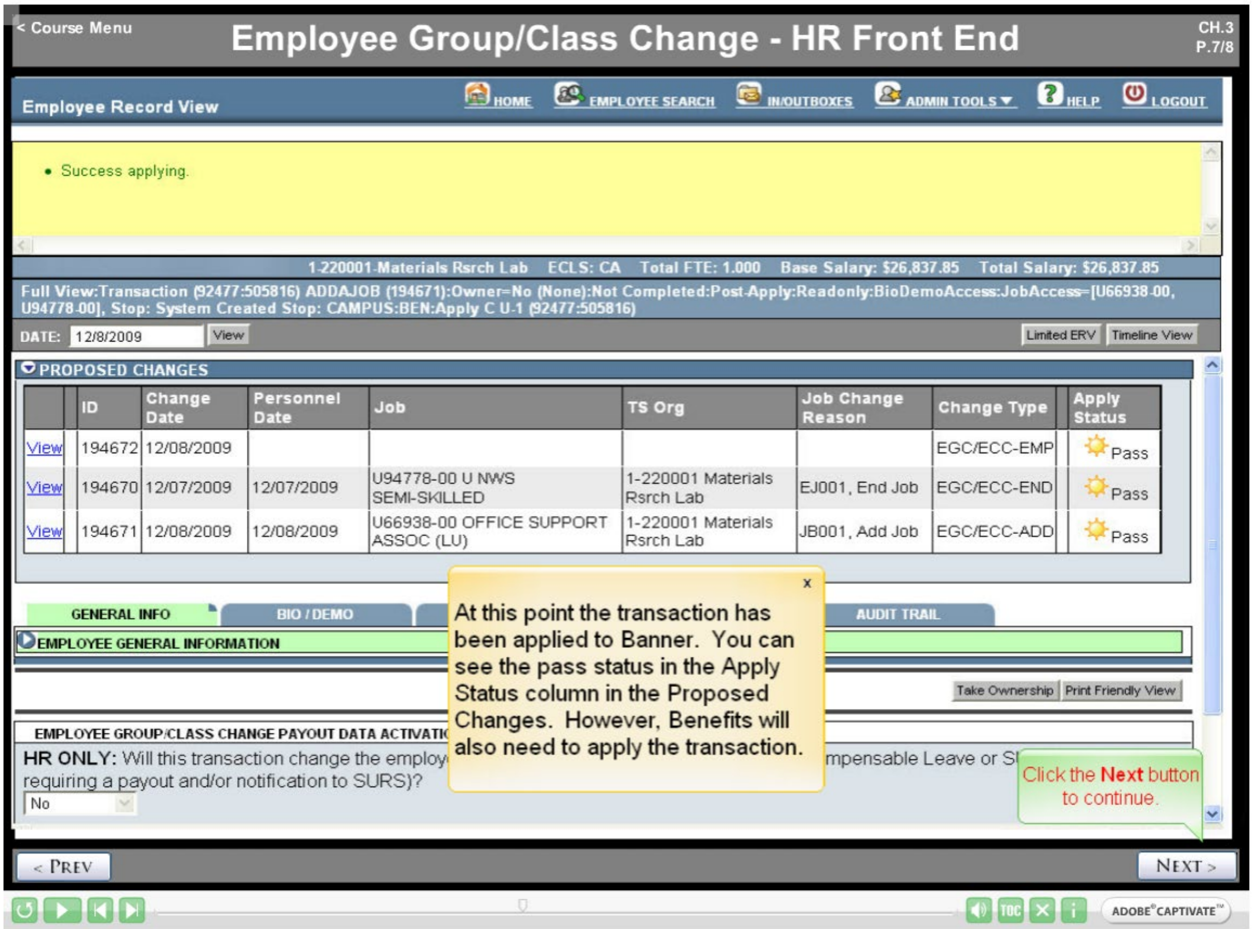
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- Success applying.

1-220001-Materials Rsrch Lab ECLS: CA Total FTE: 1.000 Base Salary: $26,837.85 Total Salary: $26,837.85

Full View:Transaction (92477:505816) ADDAJOB (194671):Owner=No (None):Not Completed:Post-Apply:Readonly:BioDemoAccess:JobAccess=[U66938-00, U94778-00], Stop: System Created Stop: CAMPUS:BEN:Apply C U-1 (92477:505816)

DATE: 12/8/2009

View
Limited ERV
Timeline View

PROPOSED CHANGES

		ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View		194672	12/08/2009					EGC/ECC-EMP		Pass
View		194670	12/07/2009	12/07/2009	U94778-00 U NWS SEMI-SKILLED	1-220001 Materials Rsrch Lab	EJ001, End Job	EGC/ECC-END		Pass
View		194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD		Pass

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EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATI

HR ONLY: Will this transaction change the employ mpensable Leave or S requiring a payout and/or notification to SURS)?

No

At this point the transaction has been applied to Banner. You can see the pass status in the Apply Status column in the Proposed Changes. However, Benefits will also need to apply the transaction.

Click the **Next** button to continue.

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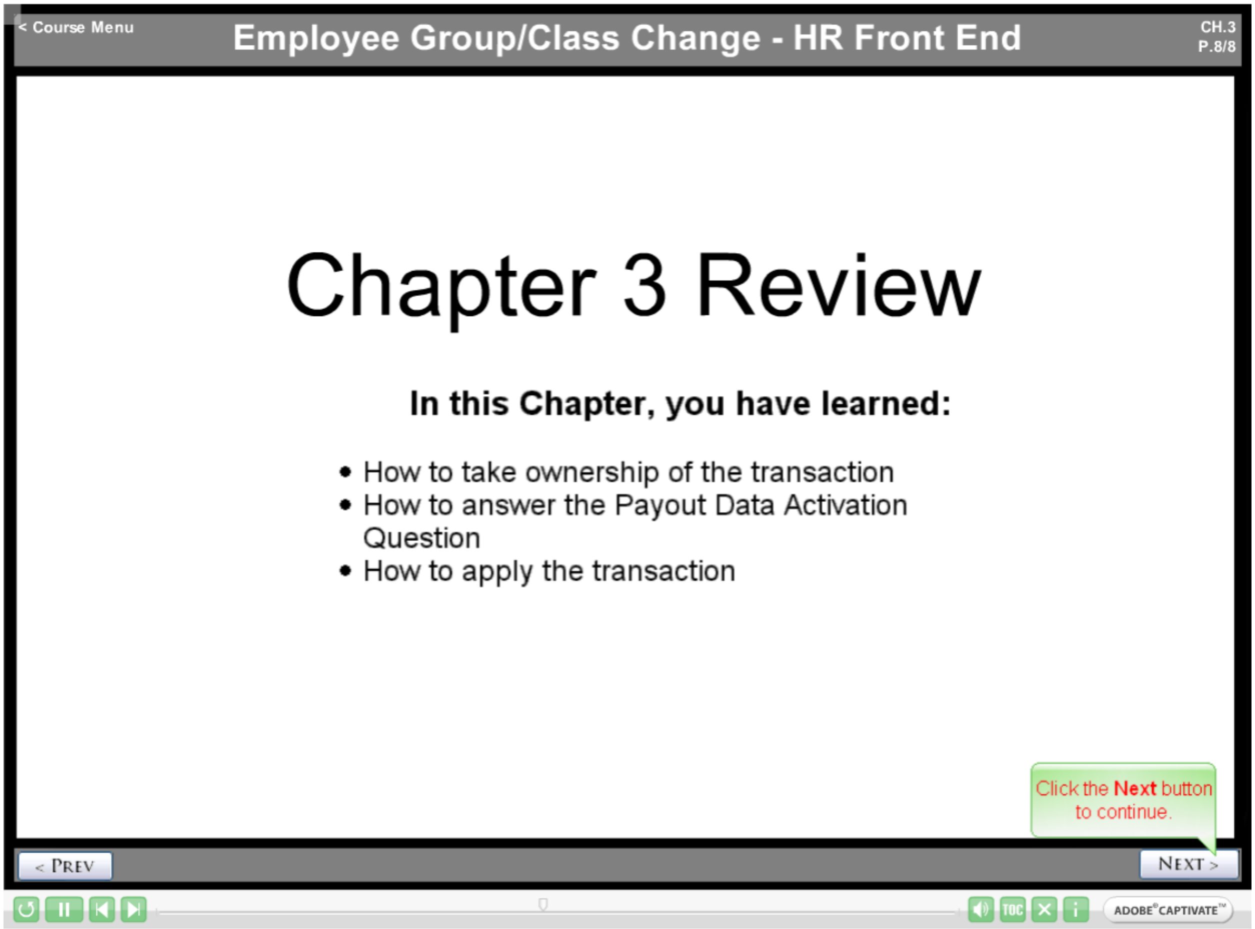
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Employee Group/Class Change - HR Front End

Chapter 3 Review

In this Chapter, you have learned:

- How to take ownership of the transaction
- How to answer the Payout Data Activation Question
- How to apply the transaction

Click the **Next** button to continue.

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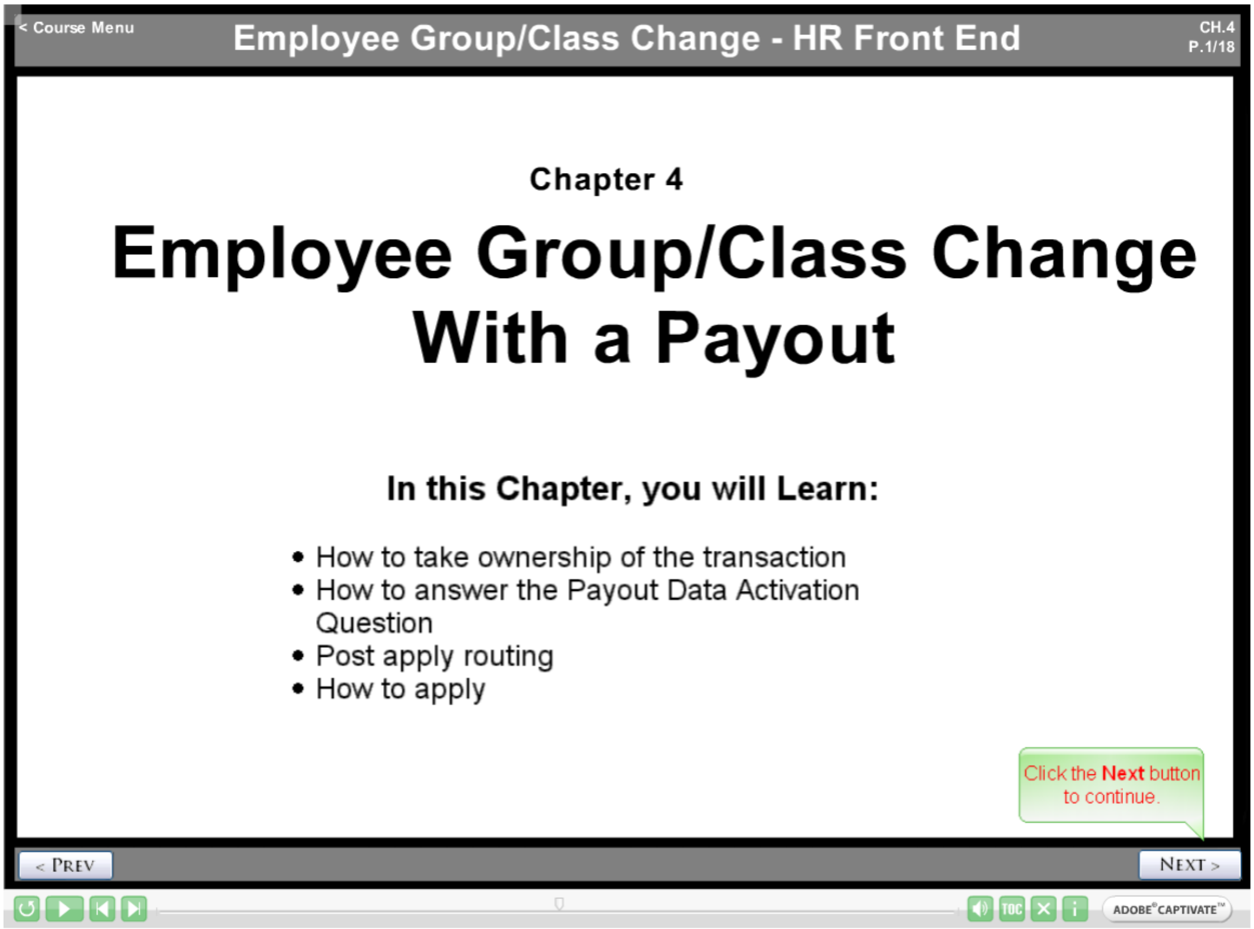
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Employee Group/Class Change - HR Front End

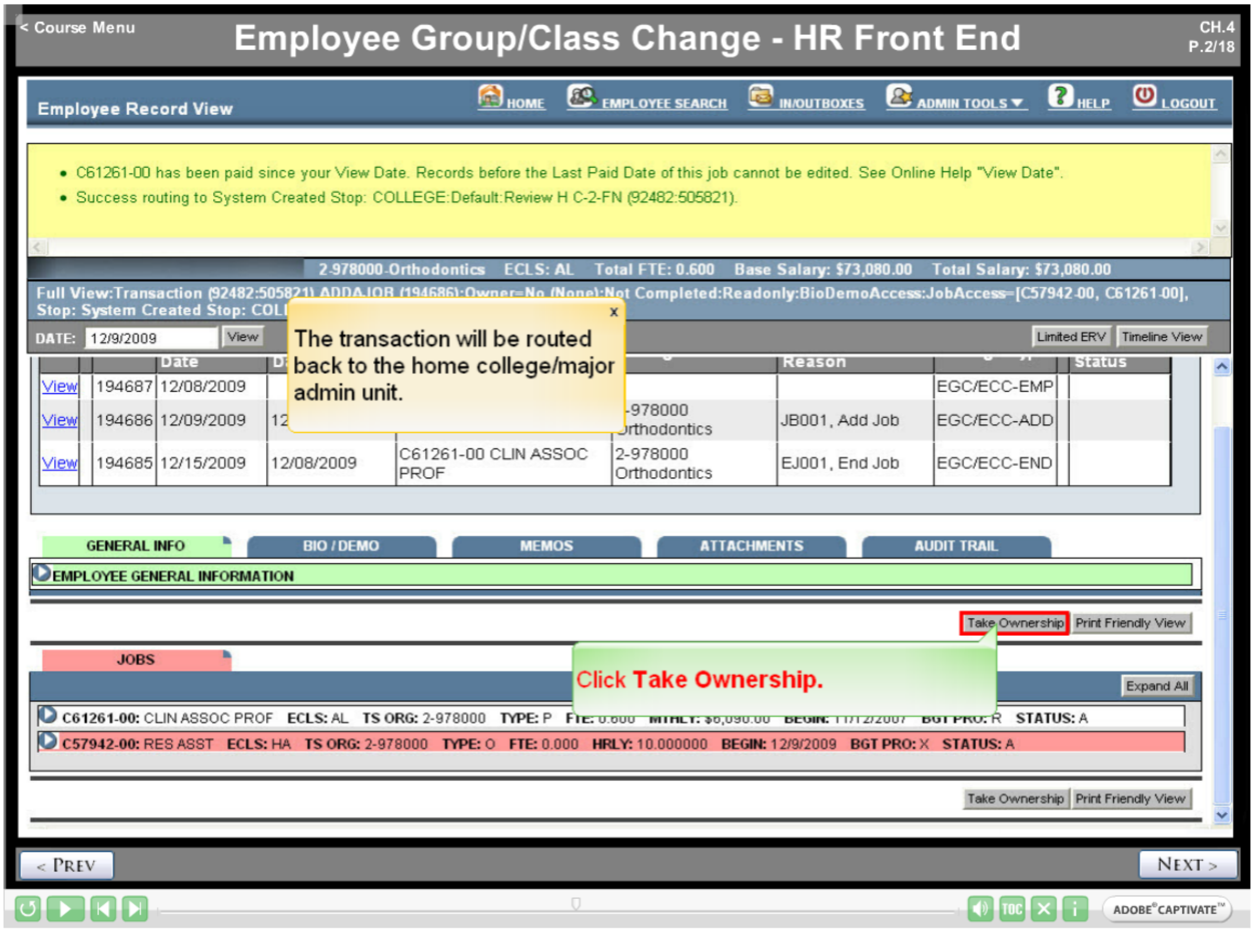
Chapter 4

Employee Group/Class Change With a Payout

In this Chapter, you will Learn:

- How to take ownership of the transaction
- How to answer the Payout Data Activation Question
- Post apply routing
- How to apply

Click the **Next** button to continue.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- C61261-00 has been paid since your View Date. Records before the Last Paid Date of this job cannot be edited. See Online Help "View Date".
- Success routing to System Created Stop: COLLEGE:Default:Review H C-2-FN (92482:505821).

2-978000-Orthodontics ECLS: AL Total FTE: 0.600 Base Salary: $73,080.00 Total Salary: $73,080.00

Full View:Transaction (92482:505821) ADDAJOB (194686):Owner=No (None):Not Completed:Readonly:BioDemoAccess:JobAccess=[C57942-00, C61261-00], Stop: System Created Stop: COL

The transaction will be routed back to the home college/major admin unit.

DATE: 12/9/2009

View
Limited ERV
Timeline View

		Date	D			Reason			Status
View	194687	12/08/2009					EGC/ECC-EMP		
View	194686	12/09/2009	12		-978000 rthodontics	JB001, Add Job	EGC/ECC-ADD		
View	194685	12/15/2009	12/08/2009	C61261-00 CLIN ASSOC PROF	2-978000 Orthodontics	EJ001, End Job	EGC/ECC-END		

GENERAL INFO
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MEMOS
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AUDIT TRAIL
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Take Ownership
Print Friendly View
JOBS
Expand All

Click **Take Ownership.**

C61261-00: CLIN ASSOC PROF ECLS: AL TS ORG: 2-978000 TYPE: P FTE: 0.600 MTHLY: $6,090.00 BEGIN: 11/12/2007 BGT PRO: R STATUS: A

C57942-00: RES ASST ECLS: HA TS ORG: 2-978000 TYPE: O FTE: 0.000 HRLY: 10.000000 BEGIN: 12/9/2009 BGT PRO: X STATUS: A

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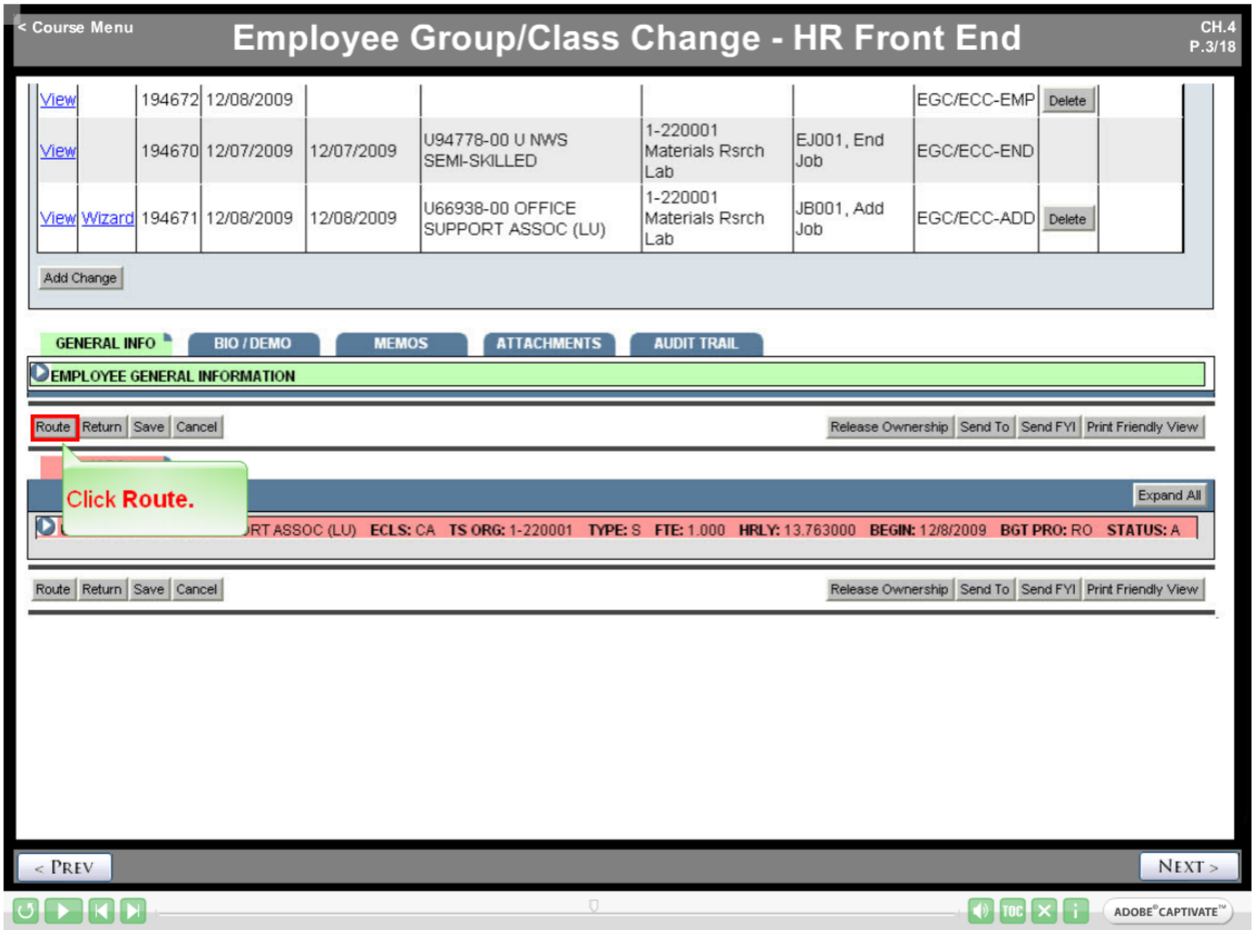
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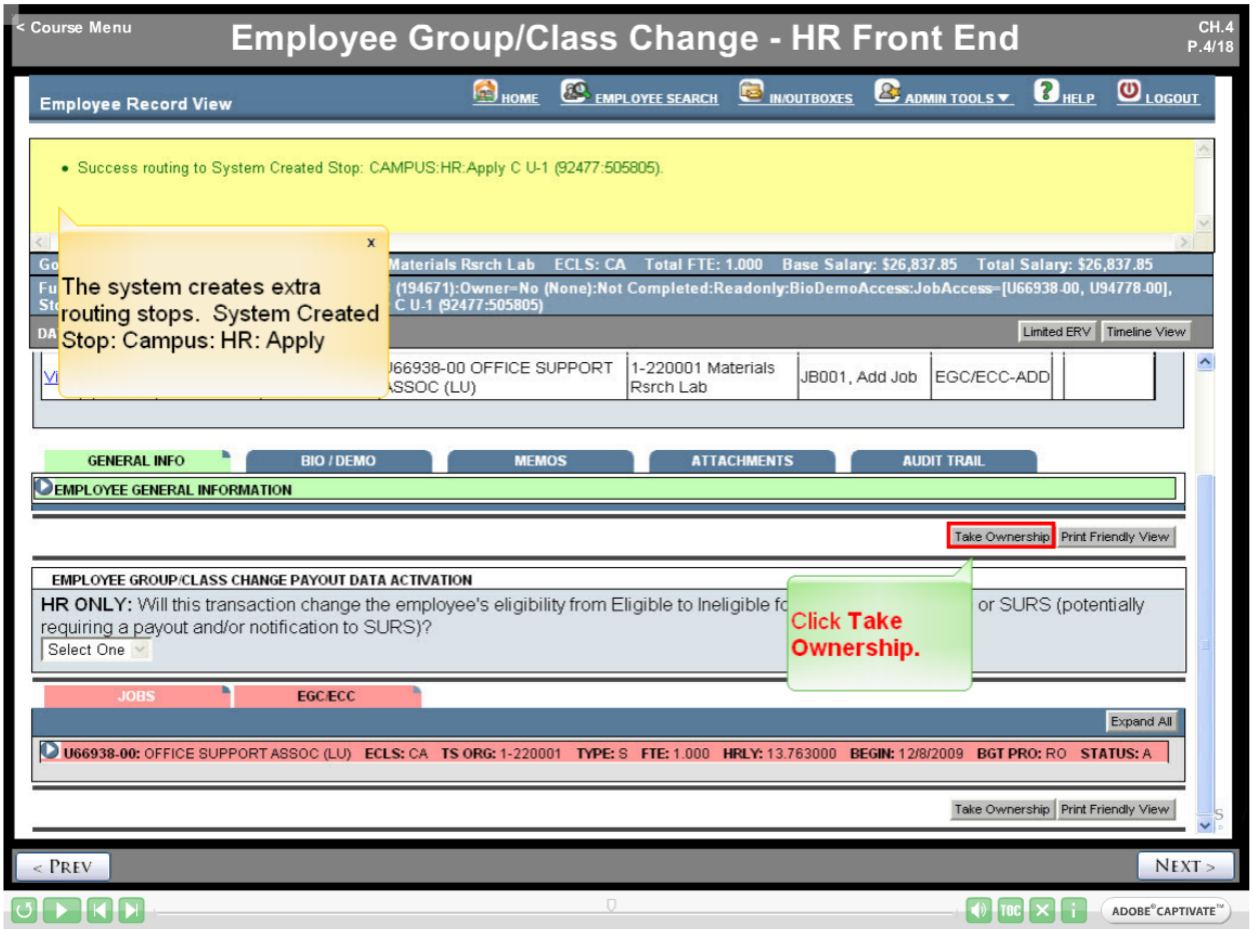
View	Wizard	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD	Delete

Click **Route.**

RT ASSOC (LU) **ECLS:** CA **TS ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A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- Success routing to System Created Stop: CAMPUS:HR:Apply C U-1 (92477:505805).

The system creates extra routing stops. System Created Stop: Campus: HR: Apply

Materials Rsrch Lab ECLS: CA Total FTE: 1.000 Base Salary: $26,837.85 Total Salary: $26,837.85

(194671):Owner=No (None):Not Completed:Readonly:BioDemoAccess:JobAccess=[U66938-00, U94778-00], C U-1 (92477:505805)

J66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD

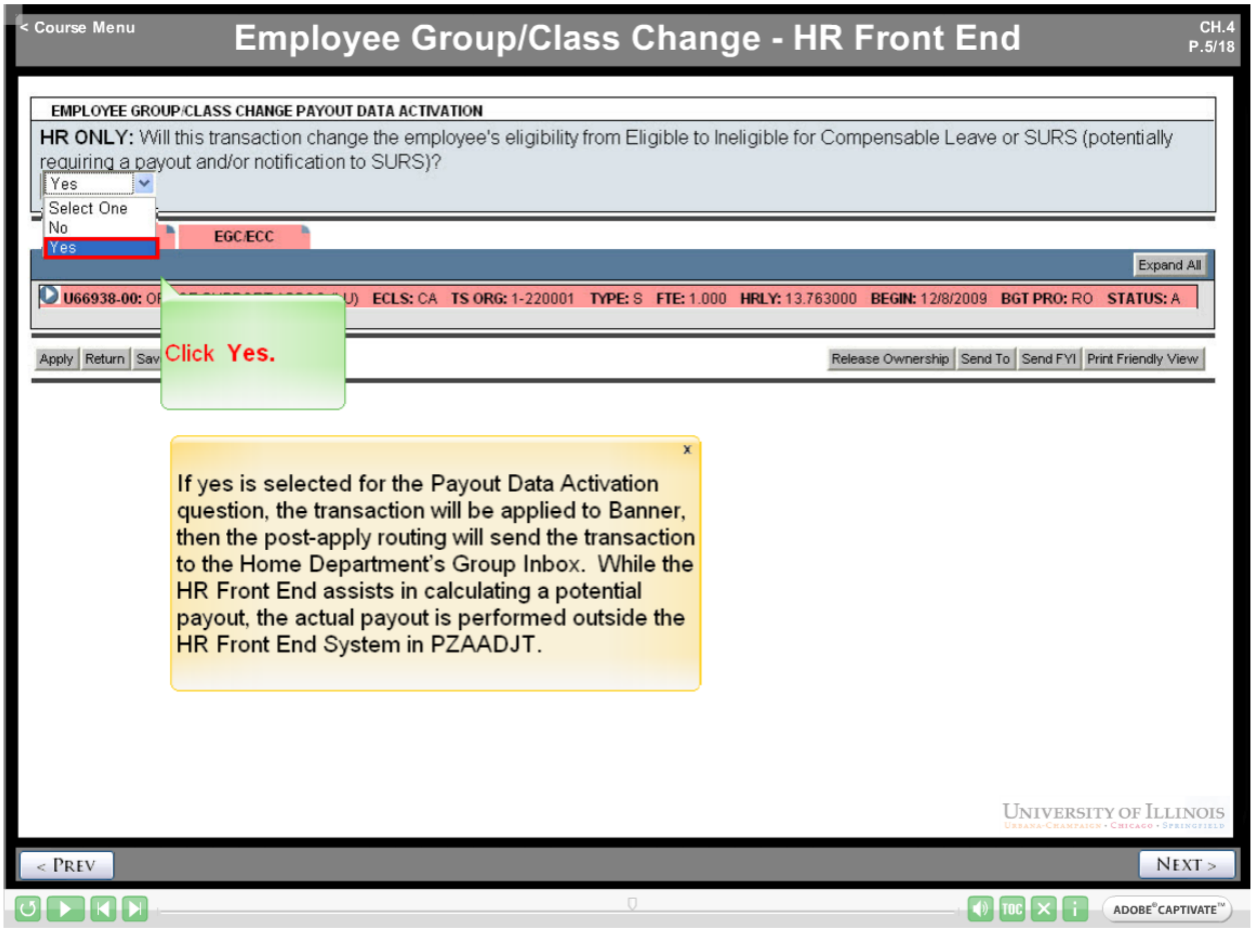
EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible fo or SURS (potentially requiring a payout and/or notification to SURS)?

Select One

Click **Take Ownership.**

U66938-00: OFFICE SUPPORT ASSOC (LU) **ECLS:** CA **TS ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A



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EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

Select One
No
Yes
EGC/ECC
Expand All

U66938-00: O… ECLS: CA TS ORG: 1-220001 TYPE: S FTE: 1.000 HRLY: 13.763000 BEGIN: 12/8/2009 BGT PRO: RO STATUS: A

Apply
Return
Sav
Release Ownership
Send To
Send FYI
Print Friendly View

Click **Yes.**

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.

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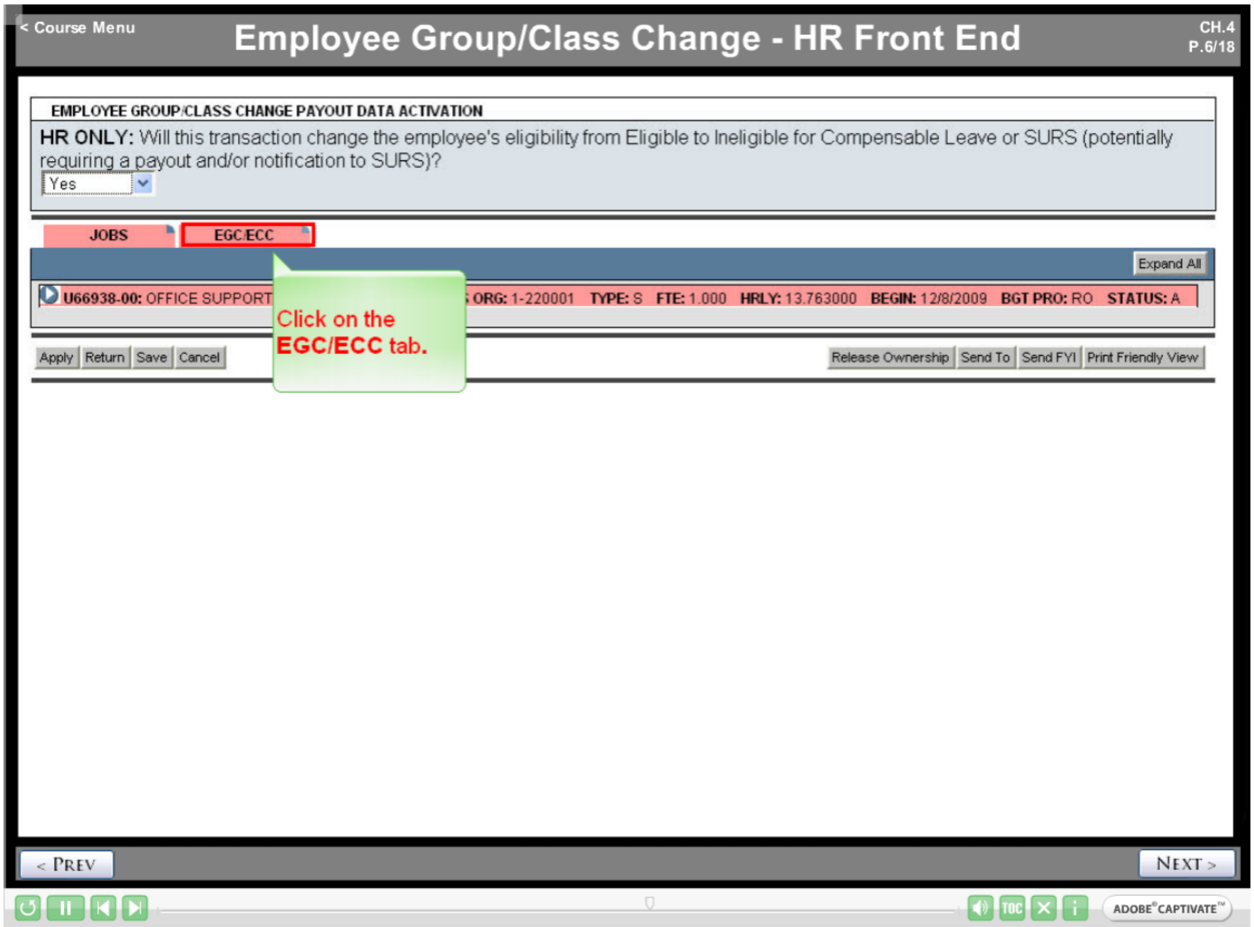
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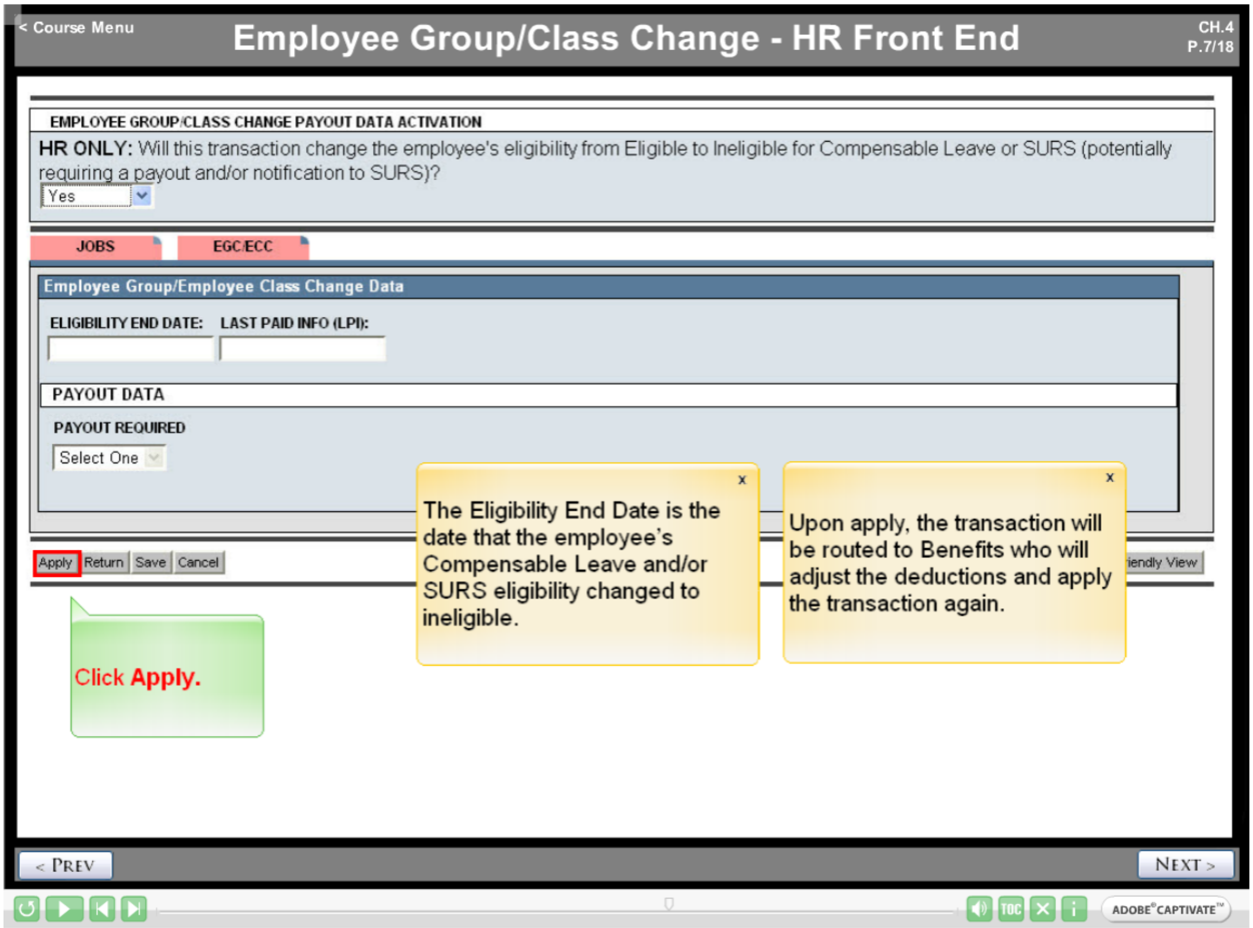
HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

U66938-00: OFFICE SUPPORT **ORG:** 1-220001 **TYPE:** S **FTE:** 1.000 **HRLY:** 13.763000 **BEGIN:** 12/8/2009 **BGT PRO:** RO **STATUS:** A

Click on the **EGC/ECC** tab.



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EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

JOBS
EGC/ECC

Employee Group/Employee Class Change Data

ELIGIBILITY END DATE:

LAST PAID INFO (LPI):

PAYOUT DATA

PAYOUT REQUIRED

Select One

Apply
Return
Save
Cancel
iendly View
x
x

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

Upon apply, the transaction will be routed to Benefits who will adjust the deductions and apply the transaction again.

Click **Apply.**

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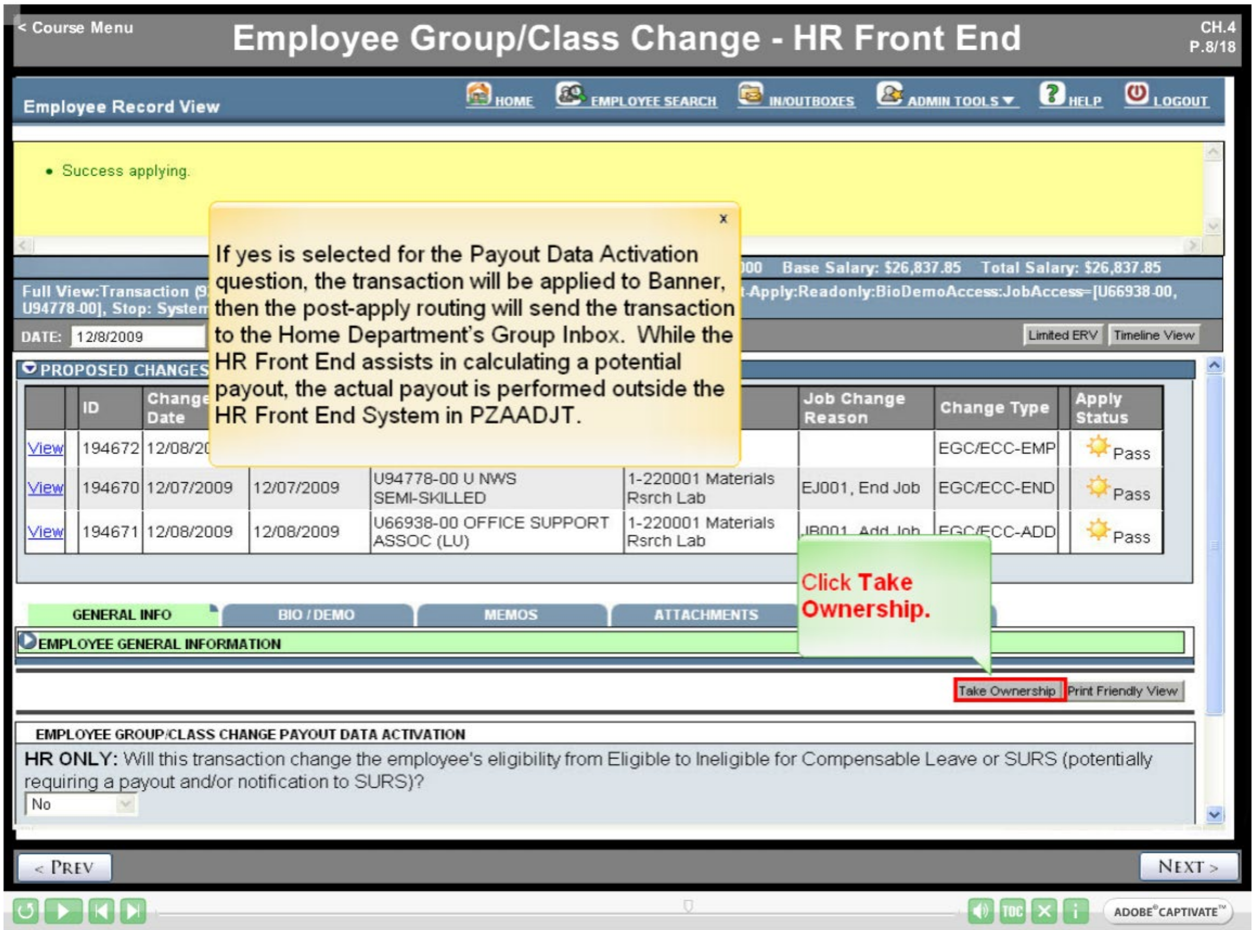
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- Success applying.

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.

00 Base Salary: $26,837.85 Total Salary: $26,837.85

Full View:Transaction (9 … U94778-00], Stop: System … t-Apply:Readonly:BioDemoAccess:JobAccess=[U66938-00,

DATE: 12/8/2009

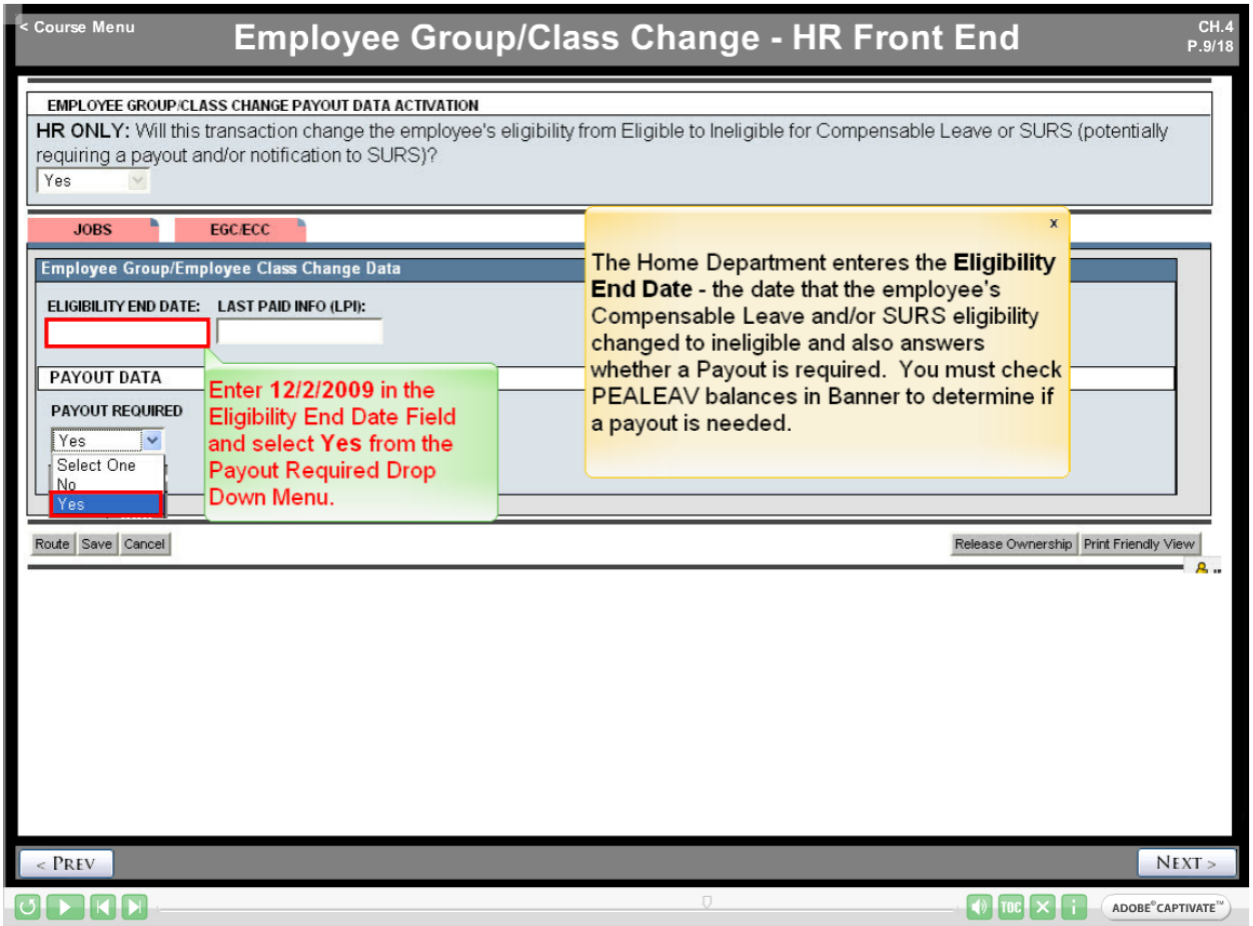
	ID	Change Date				Job Change Reason	Change Type	Apply Status
View	194672	12/08/20					EGC/ECC-EMP	Pass
View	194670	12/07/2009	12/07/2009	U94778-00 U NWS SEMI-SKILLED	1-220001 Materials Rsrch Lab	EJ001, End Job	EGC/ECC-END	Pass
View	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD	Pass

Click **Take Ownership.**

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

No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Employee Group/Class Change - HR Front End

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

Employee Group/Employee Class Change Data

ELIGIBILITY END DATE:

LAST PAID INFO (LPI):

PAYOUT DATA

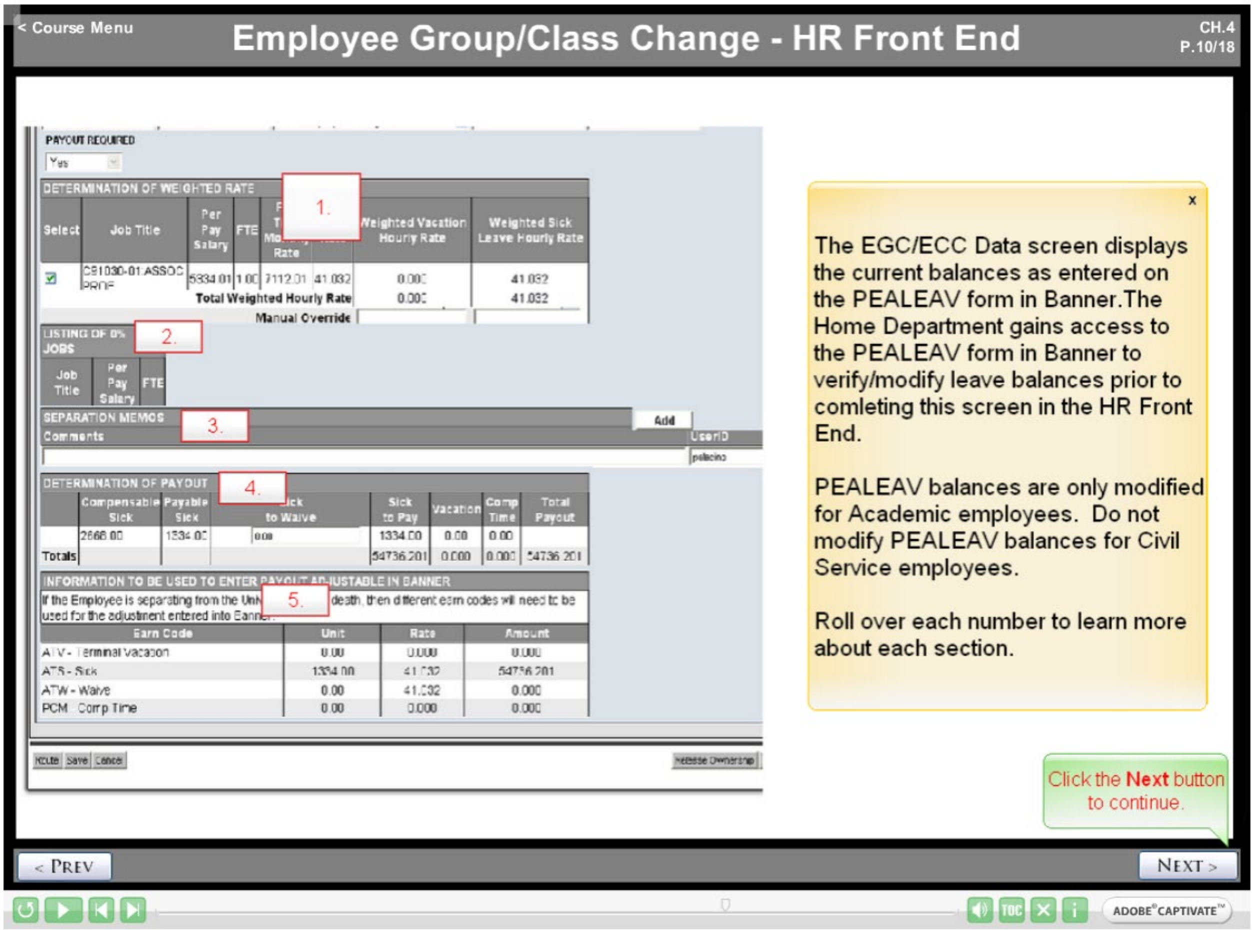
PAYOUT REQUIRED

Yes

Select One
No
Yes

Enter **12/2/2009** in the Eligibility End Date Field and select **Yes** from the Payout Required Drop Down Menu.

The Home Department enteres the **Eligibility End Date** - the date that the employee's Compensable Leave and/or SURS eligibility changed to ineligible and also answers whether a Payout is required. You must check PEALEAV balances in Banner to determine if a payout is needed.



Employee Group/Class Change - HR Front End

PAYOUT REQUIRED
Yes

DETERMINATION OF WEIGHTED RATE

Select	Job Title	Per Pay Salary	FTE	F T Mo Rate		Weighted Vacation Hourly Rate	Weighted Sick Leave Hourly Rate
☑	C91030-01:ASSOC PROF	5334.01	1.00	7112.01	41.032	0.000	41.032
				Total Weighted Hourly Rate		0.000	41.032
				Manual Override			

LISTING OF 0% JOBS

Job Title	Per Pay Salary	FTE

SEPARATION MEMOS

Comments	UserID
	pelacino

DETERMINATION OF PAYOUT

	Compensable Sick	Payable Sick	ick to Waive	Sick to Pay	Vacation	Comp Time	Total Payout
	2666.00	1334.00	0.00	1334.00	0.00	0.00	
Totals				54736.201	0.000	0.000	54736.201

INFORMATION TO BE USED TO ENTER PAYOUT ADJUSTABLE IN BANNER

If the Employee is separating from the Univ death, then different earn codes will need to be used for the adjustment entered into Banner.

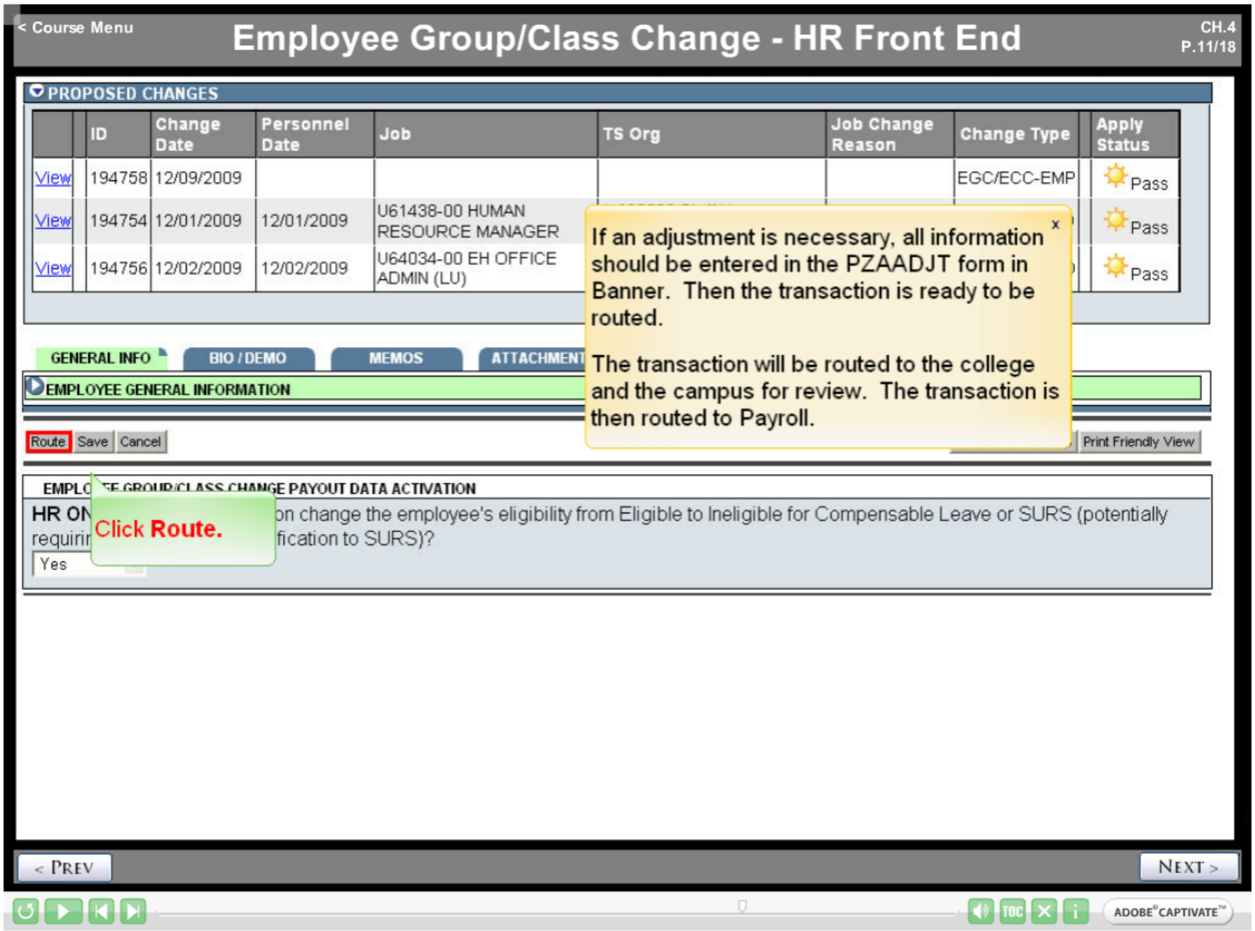
Earn Code	Unit	Rate	Amount
ATV - Terminal Vacation	0.00	0.000	0.000
ATS - Sick	1334.00	41.032	54736.201
ATW - Waive	0.00	41.032	0.000
PCM - Comp Time	0.00	0.000	0.000

The EGC/ECC Data screen displays the current balances as entered on the PEALEAV form in Banner.The Home Department gains access to the PEALEAV form in Banner to verify/modify leave balances prior to comleting this screen in the HR Front End.

PEALEAV balances are only modified for Academic employees. Do not modify PEALEAV balances for Civil Service employees.

Roll over each number to learn more about each section.

Click the **Next** button to continue.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	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
View	194758	12/09/2009					EGC/ECC-EMP	Pass
View	194754	12/01/2009	12/01/2009	U61438-00 HUMAN RESOURCE MANAGER				Pass
View	194756	12/02/2009	12/02/2009	U64034-00 EH OFFICE ADMIN (LU)				Pass

If an adjustment is necessary, all information should be entered in the PZAADJT form in Banner. Then the transaction is ready to be routed.

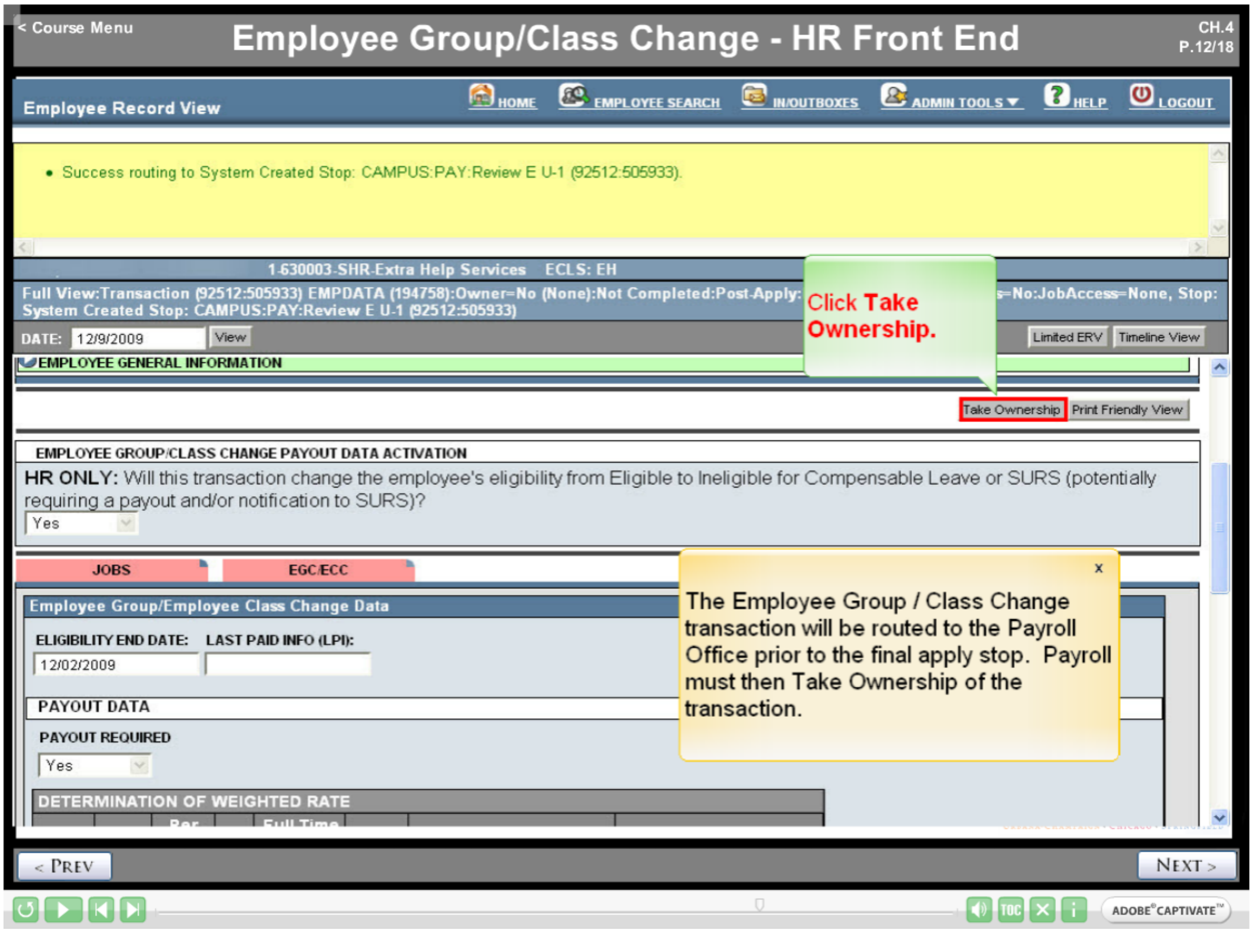
The transaction will be routed to the college and the campus for review. The transaction is then routed to Payroll.

EMPLO EE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ON on change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requirir fication to SURS)?

Yes

Click **Route.**



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Employee Group/Class Change - HR Front End

Employee Record View
HOME
EMPLOYEE SEARCH
IN/OUTBOXES
ADMIN TOOLS
HELP
LOGOUT

- Success routing to System Created Stop: CAMPUS:PAY:Review E U-1 (92512:505933).

1-630003-SHR-Extra Help Services ECLS: EH

Full View:Transaction (92512:505933) EMPDATA (194758):Owner=No (None):Not Completed:Post-Apply: s=No:JobAccess=None, Stop: System Created Stop: CAMPUS:PAY:Review E U-1 (92512:505933)

DATE: 12/9/2009

View
Limited ERV
Timeline View
EMPLOYEE GENERAL INFORMATION
Take Ownership
Print Friendly View

Click Take Ownership.

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

JOBS
EGC/ECC

Employee Group/Employee Class Change Data

ELIGIBILITY END DATE: 12/02/2009

LAST PAID INFO (LPI):

PAYOUT DATA

PAYOUT REQUIRED: Yes

DETERMINATION OF WEIGHTED RATE

The Employee Group / Class Change transaction will be routed to the Payroll Office prior to the final apply stop. Payroll must then Take Ownership of the transaction.

x
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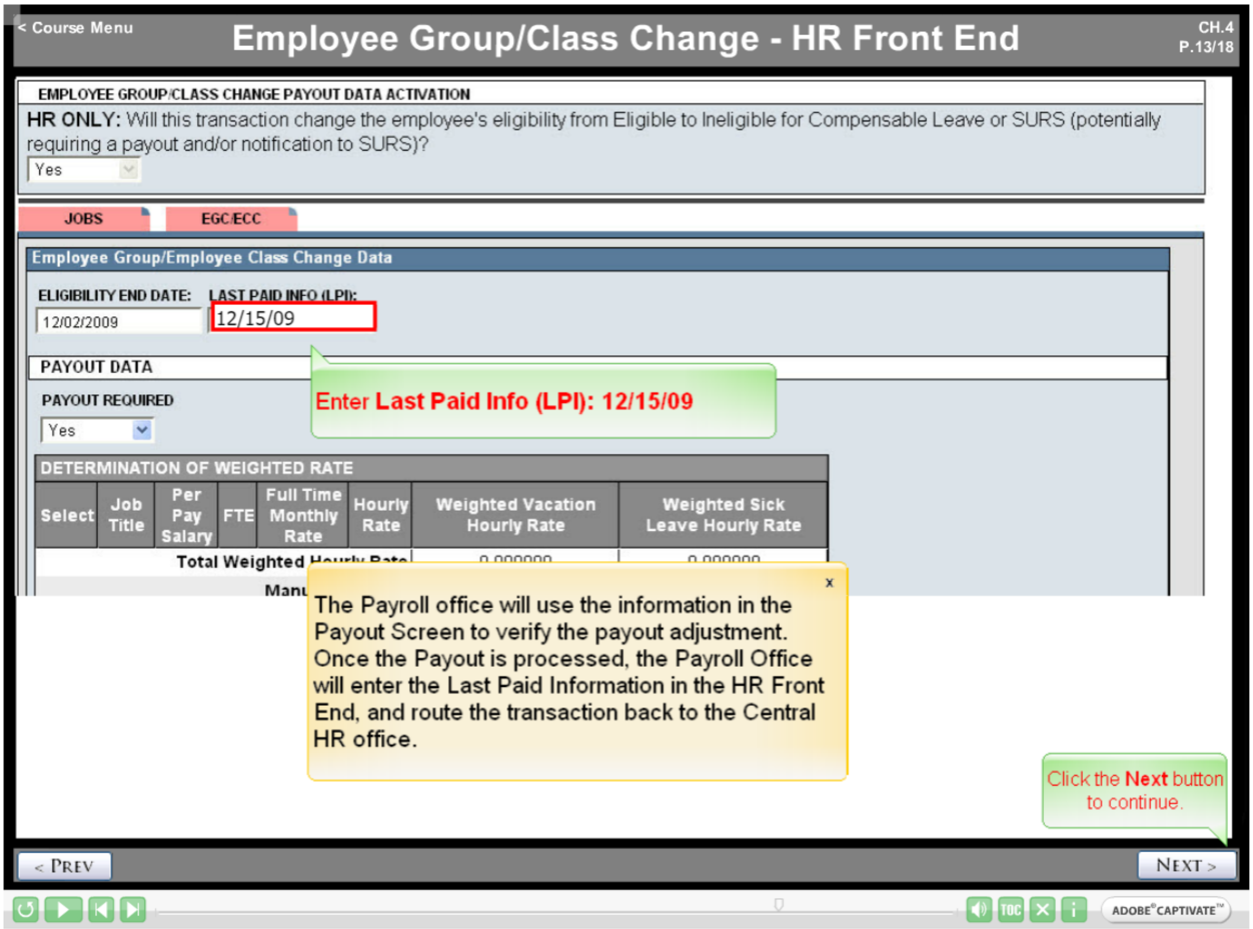


Employee Group/Class Change - HR Front End

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requiring a payout and/or notification to SURS)?

Yes

Employee Group/Employee Class Change Data

ELIGIBILITY END DATE: 12/02/2009

LAST PAID INFO (LPI): 12/15/09

PAYOUT DATA

PAYOUT REQUIRED: Yes

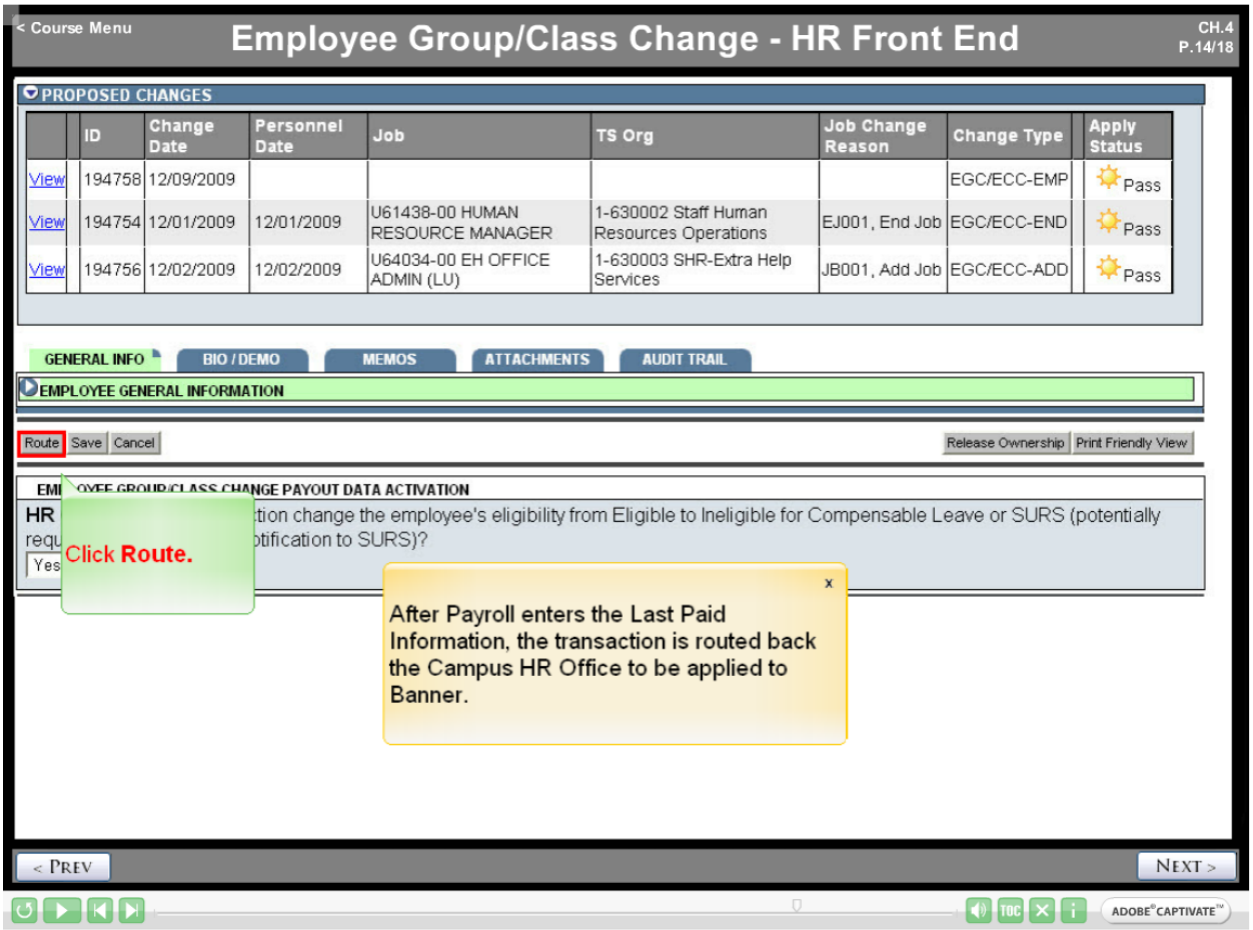
Enter **Last Paid Info (LPI): 12/15/09**

DETERMINATION OF WEIGHTED RATE

Select	Job Title	Per Pay Salary	FTE	Full Time Monthly Rate	Hourly Rate	Weighted Vacation Hourly Rate	Weighted Sick Leave Hourly Rate
Total Weighted Hourly Rate						0.000000	0.000000
Manu							

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.

Click the **Next** button to continue.



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Employee Group/Class Change - HR Front End

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PROPOSED CHANGES

		ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type		Apply Status
View		194758	12/09/2009					EGC/ECC-EMP		Pass
View		194754	12/01/2009	12/01/2009	U61438-00 HUMAN RESOURCE MANAGER	1-630002 Staff Human Resources Operations	EJ001, End Job	EGC/ECC-END		Pass
View		194756	12/02/2009	12/02/2009	U64034-00 EH OFFICE ADMIN (LU)	1-630003 SHR-Extra Help Services	JB001, Add Job	EGC/ECC-ADD		Pass

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Route
Save
Cancel
Release Ownership
Print Friendly View

EMI OYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR tion change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially requ otification to SURS)?

Yes

Click **Route.**

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

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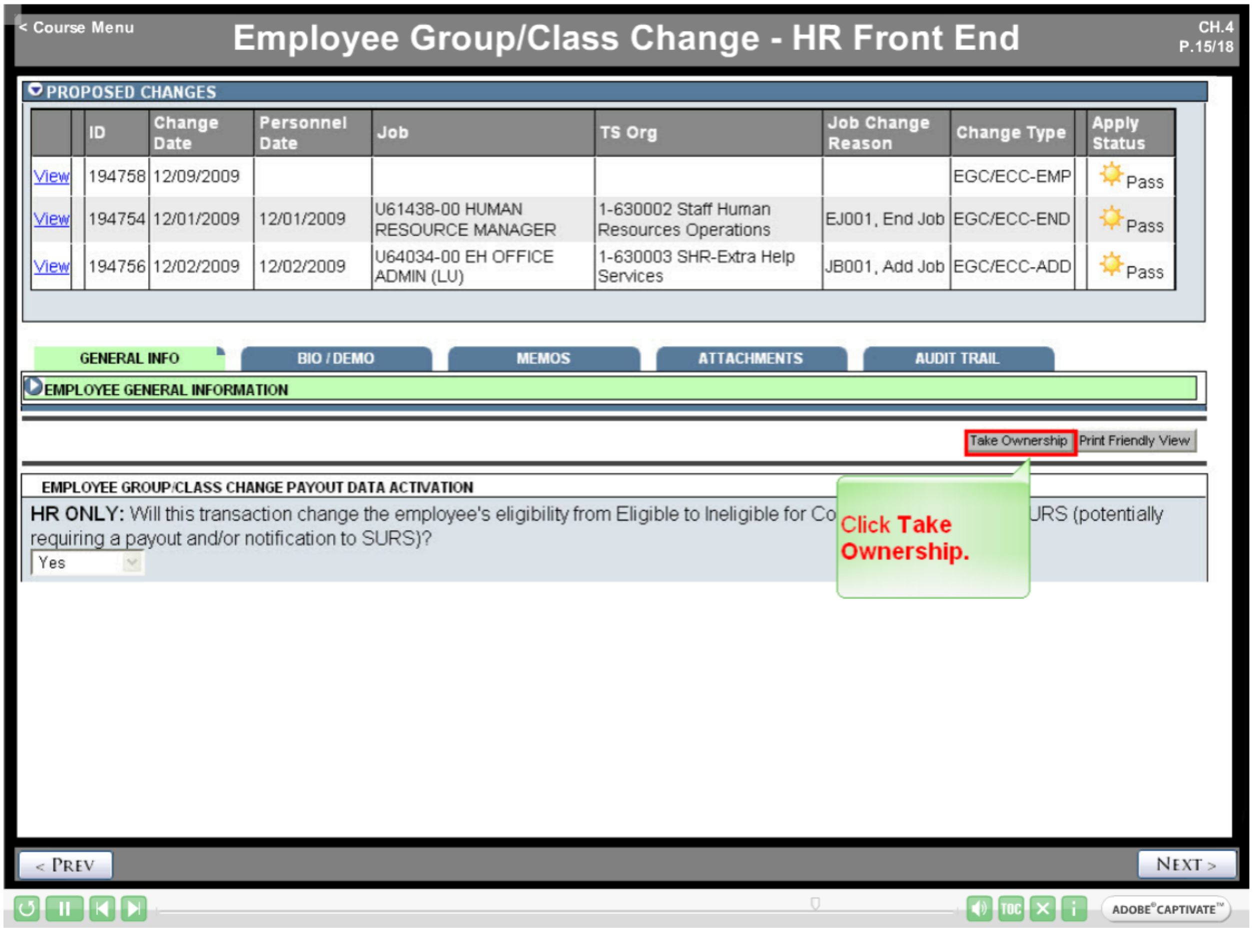
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Employee Group/Class Change - HR Front End

PROPOSED CHANGES

	ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
View	194758	12/09/2009					EGC/ECC-EMP	Pass
View	194754	12/01/2009	12/01/2009	U61438-00 HUMAN RESOURCE MANAGER	1-630002 Staff Human Resources Operations	EJ001, End Job	EGC/ECC-END	Pass
View	194756	12/02/2009	12/02/2009	U64034-00 EH OFFICE ADMIN (LU)	1-630003 SHR-Extra Help Services	JB001, Add Job	EGC/ECC-ADD	Pass

GENERAL INFO
BIO / DEMO
MEMOS
ATTACHMENTS
AUDIT TRAIL
EMPLOYEE GENERAL INFORMATION
Take Ownership
Print Friendly View

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Co URS (potentially requiring a payout and/or notification to SURS)?

Yes

Click Take Ownership.

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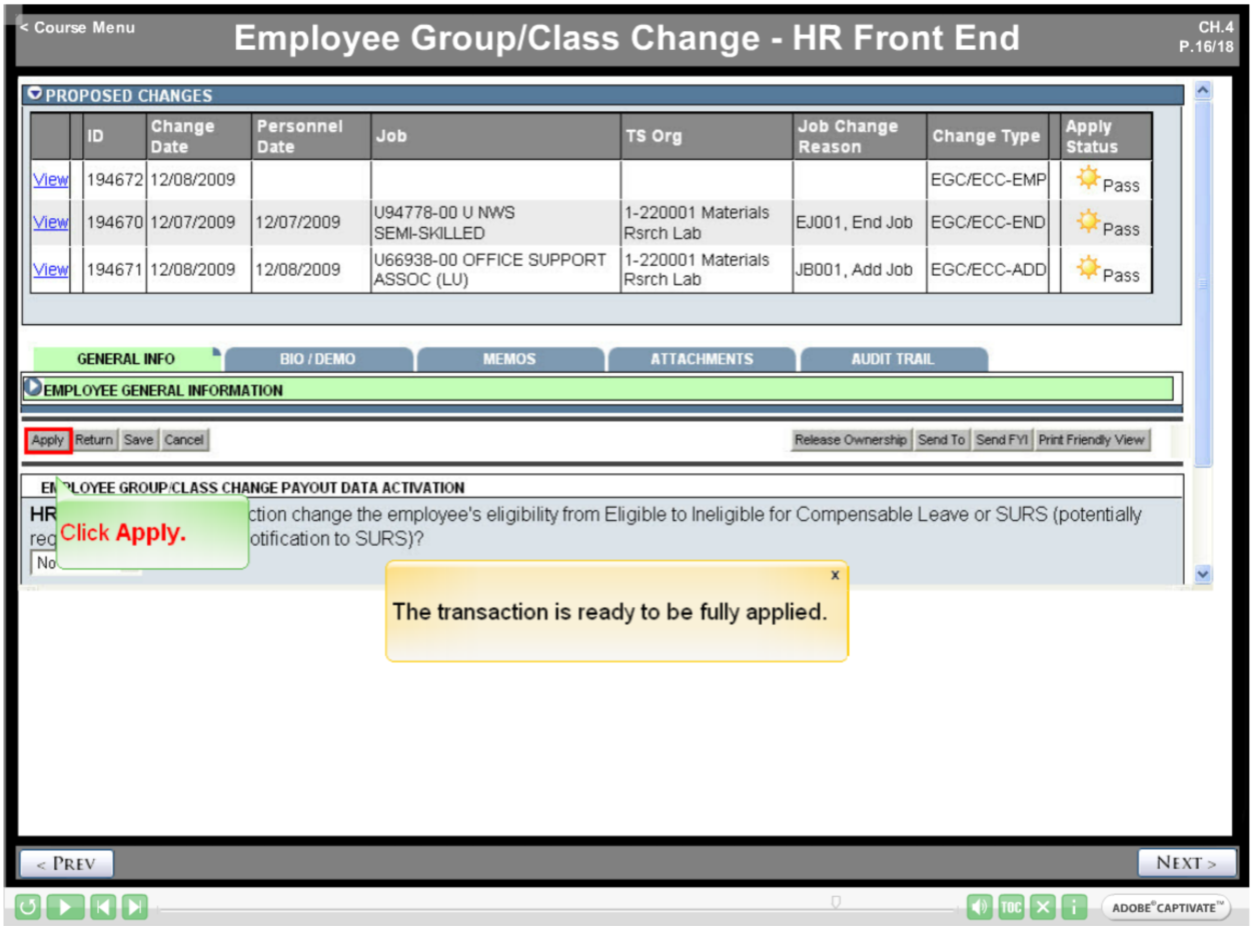

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Employee Group/Class Change - HR Front End

PROPOSED CHANGES

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View	194672	12/08/2009					EGC/ECC-EMP	Pass
View	194670	12/07/2009	12/07/2009	U94778-00 U NWS SEMI-SKILLED	1-220001 Materials Rsrch Lab	EJ001, End Job	EGC/ECC-END	Pass
View	194671	12/08/2009	12/08/2009	U66938-00 OFFICE SUPPORT ASSOC (LU)	1-220001 Materials Rsrch Lab	JB001, Add Job	EGC/ECC-ADD	Pass

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EMPLOYEE GENERAL INFORMATION

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Return
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Cancel
Release Ownership
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Send FYI
Print Friendly View

EI PLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SURS (potentially req otification to SURS)?

No

Click **Apply.**

The transaction is ready to be fully applied.

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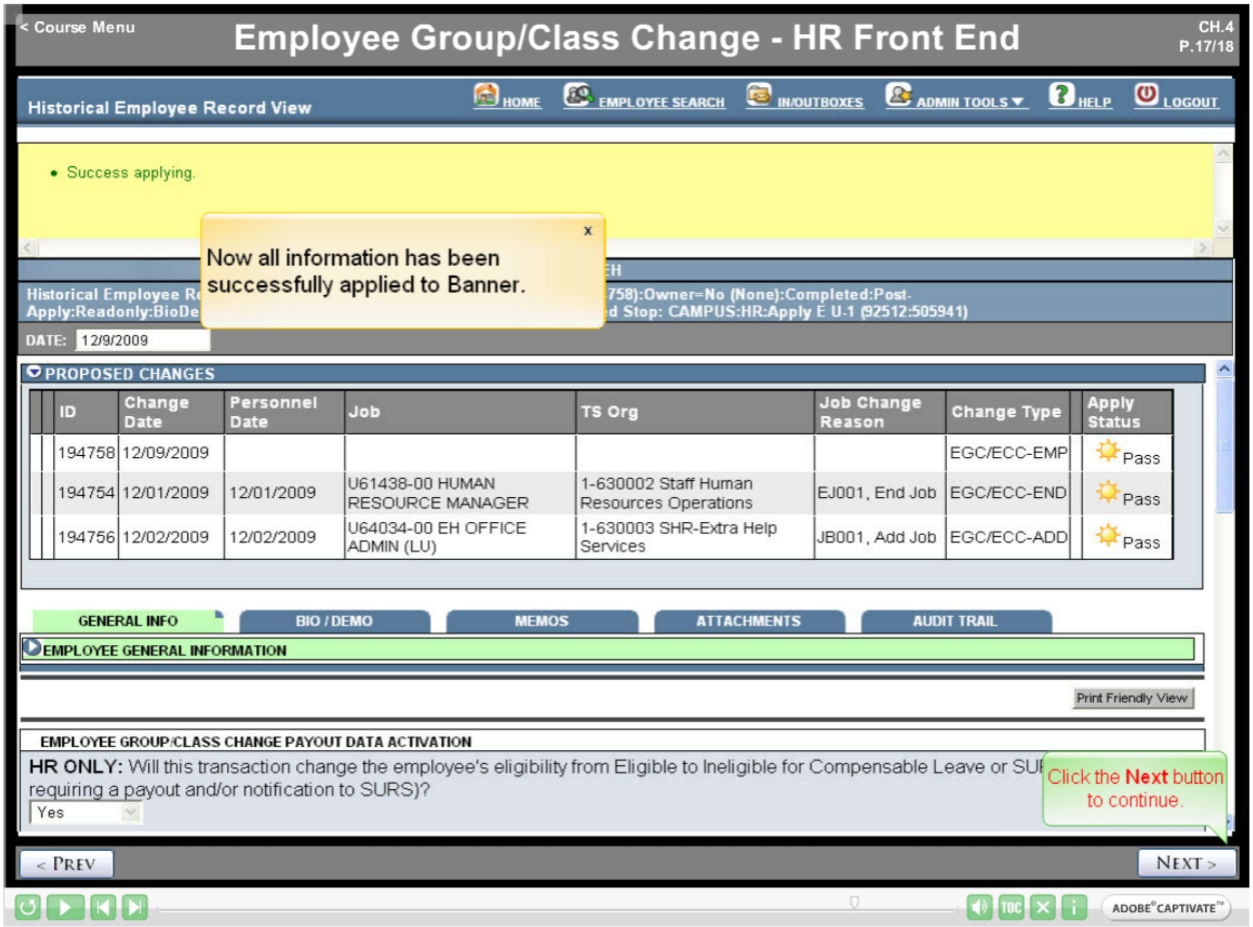
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Employee Group/Class Change - HR Front End

Historical Employee Record View

- Success applying.

Now all information has been successfully applied to Banner.

EH

Historical Employee Re… …758):Owner=No (None):Completed:Post-Apply:Readonly:BioDe… …d Stop: CAMPUS:HR:Apply E U-1 (92512:505941)

DATE: 12/9/2009

PROPOSED CHANGES

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	Apply Status
194758	12/09/2009					EGC/ECC-EMP	Pass
194754	12/01/2009	12/01/2009	U61438-00 HUMAN RESOURCE MANAGER	1-630002 Staff Human Resources Operations	EJ001, End Job	EGC/ECC-END	Pass
194756	12/02/2009	12/02/2009	U64034-00 EH OFFICE ADMIN (LU)	1-630003 SHR-Extra Help Services	JB001, Add Job	EGC/ECC-ADD	Pass

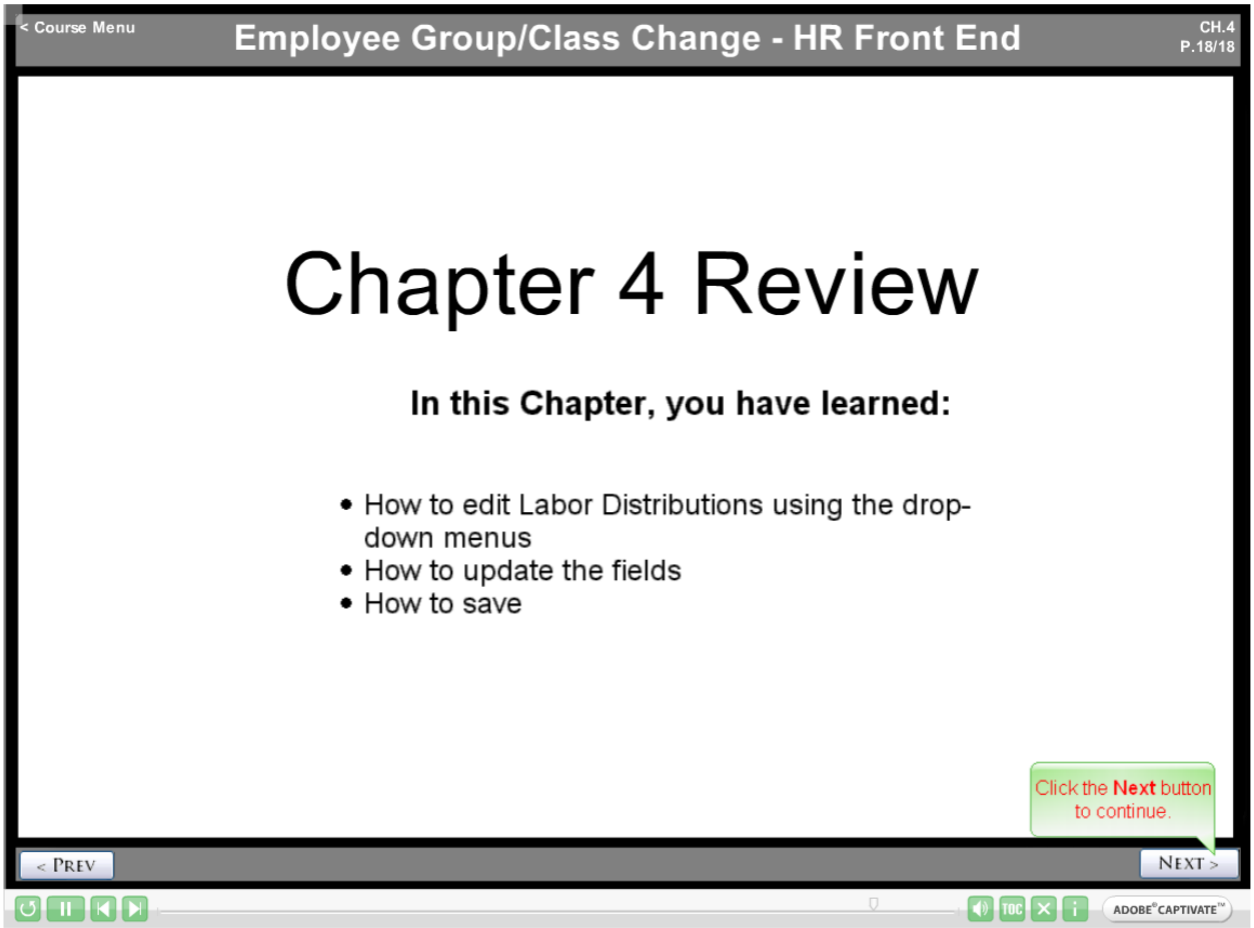
EMPLOYEE GENERAL INFORMATION

EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION

HR ONLY: Will this transaction change the employee's eligibility from Eligible to Ineligible for Compensable Leave or SUI… requiring a payout and/or notification to SURS)?

Yes

Click the **Next** button to continue.



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Chapter 4 Review

In this Chapter, you have learned:

- How to edit Labor Distributions using the drop-down menus
- How to update the fields
- How to save

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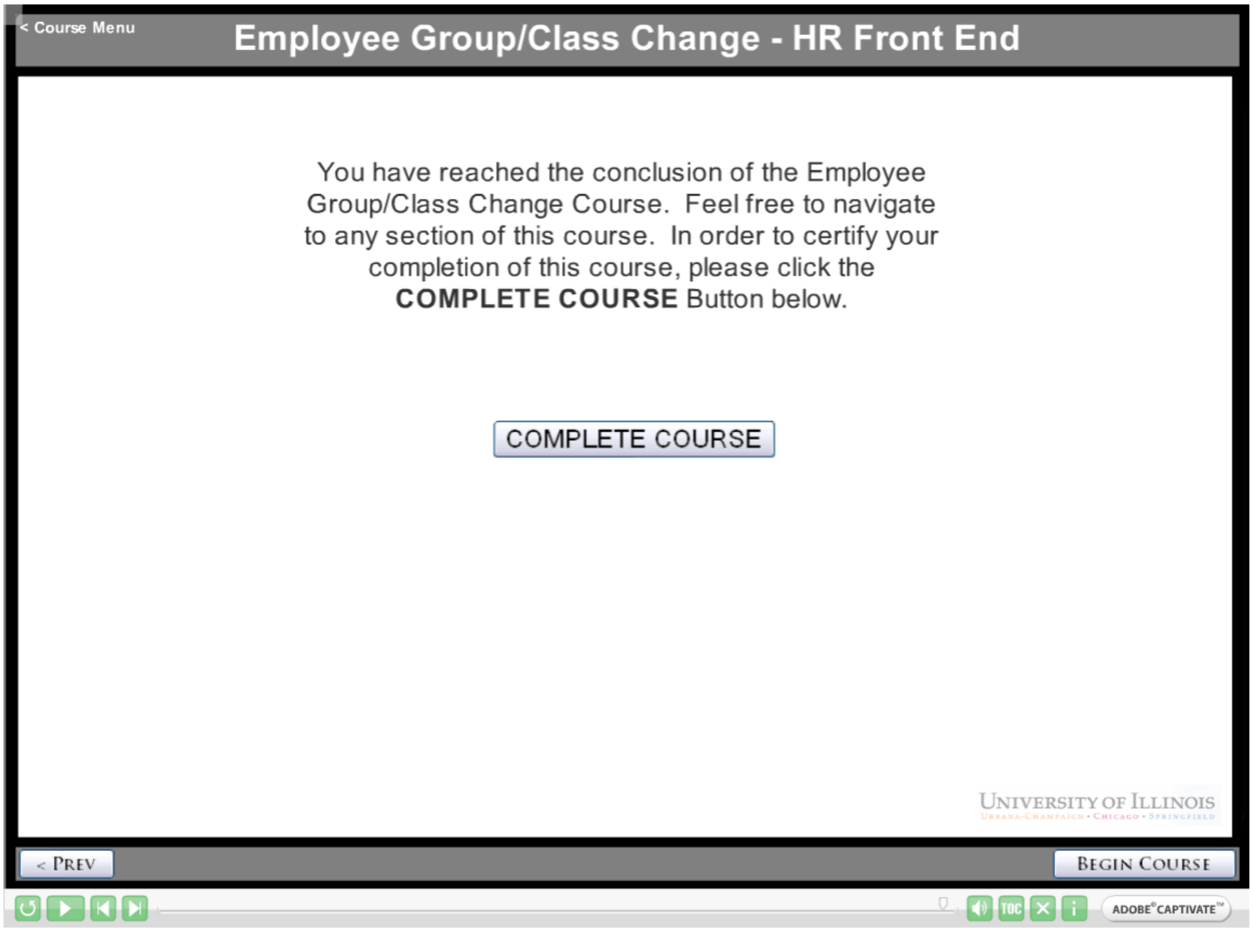
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You have reached the conclusion of the Employee Group/Class Change Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the **COMPLETE COURSE** Button below.

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