

Employee Group/Class Change

Human Resources Front End

How-To Guide

HR Front End Training Team

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

Employee Group/Class Change

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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.

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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 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.

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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 PEAMPL 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.

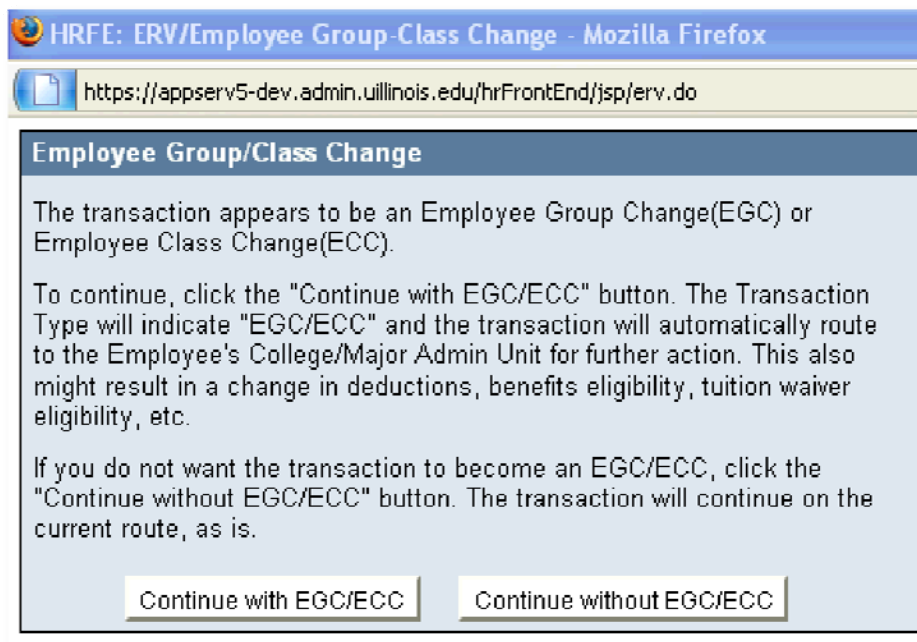


Figure 1: Employee Group/Class Change message

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.

The screenshot displays the HRFE: ERV (Full View: Transaction (1754:4590) JOBCHANGE (5689): Editable) interface. The browser address bar shows the URL: https://appserv5-dev.admin.ullinois.edu/hrFrontEnd/jsp/erv.do. The interface includes a navigation bar with links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. The main content area shows employee details: Last Name, First Name: 7654321, 9-904001-AVP Human Resources/Shared, ECLS: BB, Total FTE: 0.250, Base Salary: \$13,132.82, Total Salary: \$13,132.82. Below this is a section for PROPOSED CHANGES with a table:

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	
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

Below the table is an 'Add Change' button. The interface also includes tabs for GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The EMPLOYEE GENERAL INFORMATION section is expanded, showing a red-bordered box for 'EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION' with the question: '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)?' and a dropdown menu set to 'Yes'. At the bottom, there are tabs for JOBS and EGC/ECC, and a section for 'U22157-00: VST TRAINING SPEC' with details like 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: STATUS: A, and a JOB DETAIL section.

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.

- o If **No** is selected, click the **Route** button.

Transaction is routed.

- o If **Yes** is selected, Payout Screen appears

The screenshot shows the HR Front End interface for an Employee Record View. The browser title is "HRFE: ERV [Full View: Transaction (1754:5040) JOBCHANGE (5689):Editable] - Mozilla Firefox". The URL is "https://auserv5-dev.admin.uillinois.edu/hrFrontEnd/erv.jsp". The page title is "Employee Record View". The employee information includes: Last Name, First Name: 54321; 9-904001-AYP Human Resources/Shared; ECLS: BB; Total FTE: 0.250; Base Salary: \$13,132.82; Total Salary: \$13,132.82. The full view information includes: Transaction (1754:5040) JOBCHANGE (5689):Owner-Yes (trishak):Not Completed:Post-Apply:Editable:BioDemoAccess-None:JobAccess-None. Stop: System Send-To Stop: DEPT:Default:Review B U.S.AB.904 - (1754:5040). The date is 1/23/2009. The page has tabs for PROPOSED CHANGES, GENERAL INFO, EGC/ECC, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The EGC/ECC tab is selected, showing the "EMPLOYEE GROUP/CLASS CHANGE PAYOUT DATA ACTIVATION" section. The "HR ONLY" question is "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)?" with "Yes" selected. Below this is the "Employee Group/Employee Class Change Data" section with fields for "ELIGIBILITY END DATE" (01/23/2009) and "LAST PAID INFO (LPI)". The "PAYOUT DATA" section has a "PAYOUT REQUIRED" dropdown menu with "Yes" selected. The page has buttons for "Route", "Save", "Cancel", "Release Ownership", and "Print Friendly View".

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.

JOB: EGC:ECC

Employee Group/Employee Class Change Data

ELIGIBILITY END DATE: LAST PAID INFO (LPI):
01/23/2009

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
<input checked="" type="checkbox"/>	U22157-00:YST TRAINING SPEC	1094.40	0.25	4577.60	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
	bnshak	01/26/2009

DETERMINATION OF PAYOUT

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

Route Save Cancel Release Ownership Print Friendly View

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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