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.
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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 **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](image1)

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](image2)
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.*

![Employee Data Change Example](image)

**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.

1. Access Employee Record View for an employee
2. Select Employee Data from the Transactions Menu
3. Expand the Employee General Information accordion
4. Modify the necessary fields
5. Save the Transaction
6. Route the Transaction
7. Transaction is routed and reviewed until it reaches the Apply Stop
8. Apply the Transaction
Appendix A: Screenshots from HRFE Video

Welcome to the:

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

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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.
Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What an Employee Data Change is
- Employee Data Change Quick View
# Employee Data Change - Button Functionality

<table>
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<th>BUTTON</th>
<th>FUNCTIONALITY</th>
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<tr>
<td>Apply</td>
<td>The <strong>Apply</strong> feature completes the transaction and applies the data to Banner. The User must have <strong>Apply</strong> permissions for this button to be active.</td>
</tr>
<tr>
<td>Close</td>
<td>The <strong>Close</strong> button enables the user to exit the transaction.</td>
</tr>
<tr>
<td>Continue</td>
<td>The <strong>Continue</strong> button is used to proceed through the screens of a Wizard.</td>
</tr>
<tr>
<td>Delete Transaction</td>
<td>The <strong>Delete Transaction</strong> button is used to delete a transaction from the system.</td>
</tr>
<tr>
<td>Print Friendly View</td>
<td>The <strong>Print Friendly View</strong> button opens a separate window that will align the data from the current screen in a format that can be easily printed.</td>
</tr>
<tr>
<td>Route</td>
<td>The <strong>Route</strong> feature sends the transaction on to the next stop in the predetermined routing for the transaction.</td>
</tr>
<tr>
<td>Save</td>
<td>The <strong>Save</strong> 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).</td>
</tr>
<tr>
<td>Send To</td>
<td>The <strong>Send To</strong> feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.</td>
</tr>
</tbody>
</table>
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)
Employee Data Change 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 and applied to Banner.

Click the Next button to continue.
Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What an Employee Data Change is
- Employee Data Change Quick View
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
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.
Under the General Info tab, click the Employee General Information accordion bar.
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.
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.
Employee Data Change - HR Front End

Once the transaction has been routed you will get a success routing message.

Click the Next button to continue.
Chapter 2 Review

In this Chapter, you have learned:

- How to initiate an Employee Data Change
- How to make changes
- How to save
- About the Proposed Changes
- How to Route
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.