Historical Job Change
HR FRONT END TRAINING
HOW-TO GUIDE
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 Historical Job Change Quick View

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<thead>
<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
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<td>1</td>
<td>• Locate the employee's record and initiate a Historical Job Change transaction.</td>
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<td>• Complete the Job Selection screen.</td>
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<td>3</td>
<td>• Complete the Change Date &amp; Comment screen.</td>
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<td>4</td>
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Introduction

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

Before processing a Historical Job Change transaction, ensure that prior approvals have been obtained where applicable.

What is a Historical Job Change?

Historical Job Change transactions in the HR Front End are used to correct the Personnel Date on job records. Two conditions must both be met to use a Historical Job Change on a record:

- The job record is dated on or before the Last Paid Date.
- All information on the job record is correct except for the date.

When both of these apply to a job record, use a Historical Job Change to edit the Personnel Date on the job record. The HR Front End contains a wizard to lead you through the screens involved in a Historical Job Change. Since Historical Job Changes are processed on a job record after pay has been calculated, a pay adjustment outside of the HR Front End is often required, as well.

It is possible to complete multiple historical changes for an employee on a single transaction. You will need to add a component for each historical change needed. For each Historical Job Change component added, you will be taken through the wizard to complete the component.

If you need to change any information on a job record other than the Personnel Date, use an Employee Job Record Change. You should also use an Employee Record Change to correct the Personnel Date on a job record dated after the Last Paid Date. Historical Job Change cannot be used on a record with an Effective Date equal to the Job Begin Date. If the Job Begin Date in the system should have been earlier, a new job needs to be created.

For example, the job labor distribution for an employee is supposed to change on 08/01/08. When entering the record to change the labor distribution a date of 10/16/08 is used instead. The employee is paid before the date discrepancy is discovered. Use a Historical Job Change to change the Personnel Date of the labor distribution change from 10/16/08 to 08/01/08.
Conventions Used in this Guide

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

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

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

A Historical Job Change is used **only** to correct the Personnel Date on an existing job record after pay has already been issued. If the job change should have taken effect before the Last Paid Date on the record but the change was never entered, use an Employee Job Record Change. Instructions for adding a job record that is dated before the Last Paid Date are found in the Employee Job Record Change guide.

**Initiating a Historical Job Change**

To begin a Historical Job Change, you must first open the employee’s record.

1. Click **Employee Search** in the navigation bar at the top of the screen.

   *The Employee Search screen appears.*

   ![Employee Search Screen](https://example.com/employee-search.png)

   **Figure 1: Completed Employee Search screen**

2. Type or select the search criteria in the available fields and click **Search**.

   *The search results appear in a table in the area below the solid black line.*

3. Highlight the desired employee in the results list and click **Select**.

   *The Employee Record View for the selected employee appears.*
Figure 2: Employee Record View

4. If desired, type a different date in the View Date and click View. You can make changes only to jobs that exist as of the View Date, so choose a date accordingly.

The Employee Record View refreshes as of the date typed into the View Date field.

**HINT**: If you are not sure what date to use for the View Date you may want to click Timeline View. You can find the appropriate date here for the job you want to change and then click ERV to return to the Employee Record View and begin the transaction.

5. From the Transactions menu, select Historical Job Change.

The Job Selection screen of the Historical Job Change Wizard appears.
Selecting the Job

On the Job Selection screen of the wizard, you choose the specific job record that needs to be corrected. Selecting this record is a two-part process.

Figure 3: Initial Job Selection screen

6. Highlight the job that requires the change and click Continue.

NOTE: The only jobs that appear in the Job Selection screen are:
- Jobs for which you have security access.
- Jobs as of the View Date specified in the Employee Record View.

A table of effective-dated job records associated with the selected job appears below the list of jobs.

Figure 4: Job Selection screen after a job is selected
7. Highlight the effective-dated record that requires a change to the **Personnel Date** and click **Continue**.

The **Change Date and Comment** screen appears (see Figure 5 below). The **Original Effective Date** and the **Original Change Date** default from the job record selected and are not editable.

**HINT**: If the employee has multiple jobs and you realize that you have selected the wrong job, you can still select the correct job without leaving the **Job Selection** screen. Simply click the correct job in the jobs list at the top of the screen. Then click **Continue** again.

**Entering the Change Date and Comments**

In the **Change Date and Comment** screen of the wizard, you add the correct **Personnel Date**.

![Figure 5: Completed Change Date and Comment screen](image)

8. Type the corrected date in the **New Personnel Date** field.

**NOTE**: The **New Personnel Date** must be on or before the **Original Effective Date**.

9. Type notes explaining the new date in the **Comments** field.

10. Click **Continue**.

   The **Employee Record View** appears as of the **New Personnel Date**.
Completing the Historical Job Change

After the last screen of the wizard is completed, the Employee Record View displays the state of the employee as of the New Personnel Date entered into the wizard.

![Employee Record View after Historical Job Change Wizard](image)

**Figure 6: Employee Record View after Historical Job Change Wizard**

**NOTE:** The Proposed Changes accordion at the top of the Employee Record View summarizes all changes proposed on this transaction. The Change Date and Personnel Date for the Historical Job Change (noted by ‘HJC’ in the Change Type column) are the same as the New Personnel Date typed into the wizard.

11. If there are multiple components for the transactions, click the View link to the left of the Historical Job Change component.

*The Employee Record View refreshes as of the Change Date for the component.*

12. Under the Jobs tab, click the accordion bar for the changed job to expand and review the Job Detail.

*The Job Detail accordion for the job is expanded.*
13. If you need to make corrections to the information entered into the **Historical Job Change Wizard**, click the **Wizard** link to the left of the component in the **Proposed Changes**.

*The initial screen of the Historical Job Change wizard (the **Job Selection** screen) appears.*

**NOTE:** When the returning to the wizard, you must continue through all successive screens of the wizard in order for the system to properly validate data.

14. Click **Add Change** to add a component if another Historical Job Change (or other change type) is needed.

15. Add transaction memos in the **Memos** tab and attach supporting documents in the **Attachments** tab, if applicable.
NOTE: More information on how to complete steps 14 and 15 is available in the Additional Elements guide.

The transaction is now ready to be routed and applied to Banner.

Remember that you may also need to process a pay adjustment outside of the HR Front End to correct pay the employee has already received.
Appendix A: Historical Job Change Process Flow

Historical Job Change transactions in the HR Front End are processed with the help of a wizard. Below is the flow for the Historical Job Change process, including steps before, during, and after the wizard.

1. Access Timeline View or Employee Record View and review job record that requires change.
2. Select Historical Job Change from Transactions menu.
3. Wizard appears providing a list of eligible jobs.
4. Select job that requires changes and click Continue.
5. System lists effective-dated job records associated with selected job.
6. Choose one of the effective-dated records and click Continue.
7. System displays Change Date & Comments screen.
8. Enter Change Date and Comment. Click Continue.
9. System takes user to full ERV.
10. Transaction Routed.
11. Transaction Reviewed.
Welcome to the:

Historical Job Change

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

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<th>YOU WILL LEARN ABOUT</th>
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<td></td>
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<td>4 – Course Review</td>
<td>• You will participate in activities that will assess your understanding of the</td>
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<td></td>
<td>content covered in this course</td>
</tr>
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</table>

Click the Next button to continue.
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
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- 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 a Historical Job Change transaction is
- Historical Job Change Quick View
### Historical Job Change - Button Functionality

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<thead>
<tr>
<th>BUTTON</th>
<th>FUNCTIONALITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply</strong></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><strong>Close</strong></td>
<td>The <strong>Close</strong> button enables the user to exit the transaction.</td>
</tr>
<tr>
<td><strong>Continue</strong></td>
<td>The <strong>Continue</strong> button is used to proceed through the screens of a Wizard.</td>
</tr>
<tr>
<td><strong>Delete Transaction</strong></td>
<td>The <strong>Delete Transaction</strong> button is used to delete a transaction from the system.</td>
</tr>
<tr>
<td><strong>Print Friendly View</strong></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><strong>Route</strong></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><strong>Save</strong></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><strong>Send To</strong></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 Historical Job Change?

Historical Job Change transactions in the HR Front End are used to correct the Personnel Date on job records. Two conditions must both be met to use a Historical Job Change on a record:

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When both of these apply to a job record, use a Historical Job Change to edit the Personnel Date on the job record. The HR Front End contains a wizard to lead you through the screens involved in a Historical Job Change. Since Historical Job Changes are processed on a job record after pay has been calculated, a pay adjustment outside of the HR Front End is often required, as well.
Historical Job Change - HR Front End

It is possible to complete multiple historical changes for an employee on a single transaction. You will need to add a component for each historical change needed. For each Historical Job Change component added, you will be taken through the wizard to complete the component.

If you need to change any information on a job record other than the Personnel Date, use an Employee Job Record Change. You should also use an Employee Record Change to correct the Personnel Date on a job record dated after the Last Paid Date. Historical Job Change cannot be used on a record with an Effective Date equal to the Job Begin Date. If the Job Begin Date in the system should have been earlier, a new job needs to be created.
Historical Job Change Quick View

1. Locate the employee's record and initiate a Historical Job Change transaction.

2. Complete the Job Selection screen.

3. Complete the Change Date & Comment screen.

4. Review 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 a Historical Job Change transaction is
- Historical Job Change Quick View
Chapter 2

Initiating and Navigating the Historical Job Change Wizard

In this Chapter, you will learn:

- How to initiate the Historical Job Change Transaction
- How to enter the Wizard
- How to select the job
- How to select the effective-dated record
- How to enter the new personnel date
- How to enter a comment

Click the Next button to continue.
To begin a Historical Job Change, you must first open the employee's record. Once you have selected a UIN that you have permissions to, you will be taken to the Employee Record View.
Historical Job Change Wizard

Below is a list of jobs as of the View Date on the Employee Record View or Timeline View. Select the job that requires the historical change and click Continue.

<table>
<thead>
<tr>
<th>Position</th>
<th>Suffix</th>
<th>Job Title</th>
<th>Job Class</th>
<th>Timesheet Org</th>
<th>Job Begin Date</th>
<th>Job End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>C10725</td>
<td>00</td>
<td>DIR. APPE</td>
<td>BA</td>
<td>2-967000</td>
<td>08-16-2007</td>
<td></td>
</tr>
<tr>
<td>C10836</td>
<td>00</td>
<td>ASST HEAD FOR EDUC</td>
<td>BA</td>
<td>2-967000</td>
<td>12-01-2008</td>
<td></td>
</tr>
<tr>
<td>C92619</td>
<td>00</td>
<td>CLIN ASSIST PROF</td>
<td>AL</td>
<td>2-967000</td>
<td>12-16-2003</td>
<td></td>
</tr>
</tbody>
</table>

On the Job Selection screen of the wizard, you choose the specific job record that needs to be corrected.

The only jobs that appear in the Job Selection screen are:
- Jobs for which you have security access.
- Jobs as of the View Date specified in the Employee Record View.
Below is a list of jobs as of the View Date on the Employee Record View or Timeline View. Select the job that requires the historical change and click Continue.

A table of effective-dated job records associated with the selected job appears below the list of jobs.

Select the effective-dated job record then click Continue.
Historical Job Change Wizard

Enter new Personnel Date of 8/1/09

Enter Job Comment: Test

The Change Date & Comment screen appears. The Original Effective Date and the Original Change Date default from the job record selected and are not editable.

You will now enter a new Personnel Date and Comment.

The New Personnel Date must be on or before the Original Effective Date.
Chapter 2 Review

In this Chapter, you have learned:

- How to initiate the Historical Job Change Transaction
- How to enter the Wizard
- How to select the job
- How to select the effective-dated record
- How to enter the new personnel date
- How to enter a comment
Chapter 3

Reviewing the Transaction in the Employee Record View

In this Chapter, you will learn:

• About the Proposed Changes accordion
• How to route the transaction
Historical Job Change Wizard

You have chosen to make a Historical Job Change. Please enter the New Change Date and a Job Comment.

Once a new Personnel Date and Comment is entered, you are ready to review the transaction in the Employee Record View.

Click Continue.
After the last screen of the wizard is completed, the Employee Record View displays the state of the employee as of the New Personnel Date entered into the wizard.

You will now see the Proposed Changes accordion. If you have multiple components click the View Link to view the change.

You will notice the Personnel date is 8/1/09 which is the date you entered in the wizard.

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

Click the Next button to continue.
Chapter 3 Review

In this Chapter, you have learned:

- About the Proposed Changes accordion
- How to route the transaction
You have reached the conclusion of the Historical Job 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.