HR Front End Transaction – Civil Service Lateral Transfer (Initiated by the Hiring Org)

Overview

Transaction type: Request Access, Add a Job, Job End Date, and Employee Data Change.
Routing: Hiring Org Initiate, Request Access, Hiring Org Review, Home Org Review, College Review, Campus Apply
Documents to attach: provide master referral results to Staff HR's Employment staff as done pre-HRFE.

HR Front End Detailed Steps

1. *Hiring Unit* searches for employee and opens **Limited Employee Record View**.
2. Click **Request Access**
3. Select **Initiate** Level of Access.
4. Confirm that **Add a Job** is selected for transaction type.
5. Enter a Comment for the Home ORG that includes contact email & phone number, and click **Submit**.

6. *Home Unit:* locates request access transaction in the **Group Inbox**. Open transaction and **Take Ownership.**
7. Select **Yes** for approved.
8. Enter comment including contact email & phone number and click **Submit**.
9. Click **Cancel/Done** to exit screen.

10. *Hiring Unit:* locate request access transaction in **My Inbox**. Open the transaction.
11. Select **Transactions**»**Add a Job**.
12. On the Employee Class screen
    a. Choose **Employee Group** *C-Civil Service Web/Dpt Tm Entry* or *D-Civil Service Time Rpt Feeder*.
    b. Verify the answer to the Visa question.
    c. Type an **Annual Salary** and press **Tab**.
    d. Type a **Total % Employed** for the entire person using whole numbers between 0 and 100. Press **Tab**.
    e. Select **Work Wk Hrs**.
    f. Choose **Status** of *Exempt* or *Non-exempt*.
    g. If exempt, choose an **Exempt Type**.
    h. Select an answer to the Flex year/Seasonal question.
    i. Click **Continue**.
13. On the **Job Date Screen**
    a. Verify that the **Job Employee Class** is correct.
    b. Type a **Job Begin Date**. This must be after the end date added to the employee's existing job(s).
    c. Type a **Job End Date** if applicable.
    d. Click **Continue**.

14. Type a position number in the **I have a position number** field.
15. Click **Continue**.
16. **Position Data** for Civil Service positions is only editable by Staff HR. Click **Continue**.
17. On the **Job Data** screen:
    a. Type the **Job FTE**, using decimal value from 0.01 to 1.00.
    b. Review the **Hourly** rate and edit if necessary. If there are steps associated with the position, set the pay rate by selecting the appropriate salary **Step**.
    c. Review **Timesheet COA and Org** and edit if needed.
    d. **Time Entry Method** defaults to *Web*. Remember to edit it if necessary.
    e. Verify the **Job Labor Distribution**.
    f. If a change is needed to existing values click on that field, overwrite the numbers, and click **Update** to the right of the LD row. Note: You must click **Update** next to each LD row for which you change values.
    g. If an additional line is needed, use vertical blank fields below the LD row(s) to enter data, click **Add LD**.
    h. Type a **Job Comment** that includes contact email & phone number. Click **Add Comment**. Note: Once the comment is added you cannot change or remove it.
    i. Click **Continue**.
18. **Route** transaction. Hiring ORG will receive, review and route transaction.

19. <u>Home Unit:</u> Receives transaction in **Group Inbox**. **Take Ownership** and open the transaction.
20. Click **Add Change** in the ***Proposed Changes*** accordion to start the next component.
21. Set the **View** date:
    a. If the job record currently has an end date, type the existing end date in the **View** date field. Click **View**.
    b. If the job has no existing end date, type the desired end date in the **View** date field. Click **View**.
22. Select **Transactions** » **Job End Date**.
23. Click the job you want to end to expand the ***Job Detail*** if it is not already expanded.
24. Enter the desired end date in the **Job End Date** field and press **Tab**.
25. If the **Job End Date** entered is less than the previous end date, you may see a pop-up message informing you that the system is going to refresh the page as of the new Job End Date. Click **OK**. NOTE: If the end date entered is before the **Last Paid Date** the system automatically adjusts the **Job End Date** and **Personnel Date** fields as necessary. Any pay adjustment transactions should be processed outside of the HR Front End.
26. Select the proper **Job Change Reason** from the list (generally *OT012-Lateral Transfer*).
27. Type a **Job Comment** that includes contact email & phone number, and click **Add**.
    Note: Once the comment is added you cannot change or remove it.
28. Click **Save**. The ***Proposed Changes*** accordion appears for the new Job End Date transaction.
29. If you need to end another job for this person, click **Add Change** and repeat steps 20-28.
30. Click **Add Change** in the ***Proposed Changes*** accordion to start the next component.
31. Select **Transactions**»**Employee Data**.
32. Click once on the ***Employee General Information*** accordion to expand it if it is not already expanded.
33. Under the Home Chart ORG Section, select the new **COA** and **Organization**.
34. Click **Save**.
35. Routing:

a. Review all changes again and click **Route**. Should get message success routing to Home ORG Review.
b. Transaction appears in Home ORG reviewer **Group Inbox**. Org reviewer must **Take Ownership**, review, and **Route**. Should get message success routing to ORG review stop.
c. Transaction appears in College reviewer **Group Inbox**. College reviewer must **Take Ownership**, review, and **Route**. Should get message Success routing to Campus Apply stop. (If reviewer is not the home college transaction routes to the home college before going to the campus.)
d. Transaction appears in Staff HR **Group Inbox**. Staff HR must **Take Ownership**, review, and **Apply**.