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

Overview

Transaction type: Job End Date, Employee Data Change, and Add a Job
Routing: Home Org Initiate, Send To Hiring Org, Home Org Review, College Review, Campus Apply
Documents to attach:

HR Front End Detailed Steps

1. *Home Unit**:*** Searches for employee and opens **Employee Record View**.
2. 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**.
3. Select **Transactions»Job End Date**.
4. Click the job you want to end to expand the ***Job Detail*** if it is not already expanded.
5. Enter the desired end date in the **Job End Date** field and press **Tab**.
6. 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.
7. Select the proper **Job Change Reason** from the list (generally *OT012-Lateral Transfer*).
8. 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.
9. Click **Save**. The ***Proposed Changes*** accordion appears for the new Job End Date transaction.
10. If you need to end another job for this person, click **Add Change** and repeat steps 3-10.
11. If necessary, add attachment(s) as follows:
    a. Click **Attachments** tab
    b. Click **Add Attachment**
    c. Click **Browse**, select document to attach (either on your hard drive or network drive).
    d. Click **Open**
    e. Click **Add**
    f. Select **Document Type**, and type a **Description**.
    g. Repeat as necessary for additional documents. Once all are listed, click **Upload**. Check the message at the top of the screen to ensure that no error occurred.
    h. Click **Done**.
    i. You may change the **Doc Type** in **Employee Record View** by using the drop down box. You can also edit the **Description**. Then click **Save Attachment**.
12. Click **Add Change** in the ***Proposed Changes*** accordion to start the next component.
13. Select **Transactions»Employee Data**.

14. Click once on the ***Employee General Information*** accordion to expand it if it is not already expanded.
15. Select the new **Home COA** and **Organization**.
16. Click **Save**.
17. Click **Send To** button.
18. Choose the radio button to send the transaction to either a **person** or a **Group Inbox**.
19. Type or select search criteria as appropriate.
20. If sending to a person, click the **Refresh** button to display employees who match your search criteria.
21. Click **Send-To**.
22. Should get the ***Success performing send-to*** message with the group or person information listed. NOTE: Home Unit should monitor the **Group Inbox**. The transaction will return to the Home Unit for review later in the route path.
23. *Hiring Unit:* Transaction appears in **My Inbox** if sent to a person, or in **Group Inbox** if sent to a group.
24. **Take Ownership** of the transaction and open it.
25. Click **Add Change** in the **Proposed Changes** accordion.
26. Select **Transactions**»**Add a Job**.
27. 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.
    j. Type an **Annual Salary** and press **Tab**.
    k. Type a **Total % Employed** for the entire person using whole numbers between 0 and 100. Press **Tab**.
    l. Select **Work Wk Hrs**.
    m. Choose **Status** of *Exempt* or *Non-exempt*.
    n. If exempt, choose an **Exempt Type**.
    o. Select an answer to the Flex year/Seasonal question.
    c. Click **Continue**.
28. 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**.
29. Type a position number in the **I have a position number** field.
30. Click **Continue**.
31. **Position Data** for Civil Service positions is only editable by Staff HR. Click **Continue**.
32. 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**.

   i. 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.
   ii. If an additional line is needed, use vertical blank fields below the LD row(s) to enter data, click **Add LD**.

f. 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.
g. Click **Continue**.

33. Routing:
    a. Review all changes again and click **Route**. Should get message success routing to Home ORG Review.
    b. Transaction appears in <u>*Home*</u> 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 ORG reviewers **Group Inbox**. Org reviewer must **Take Ownership**, review, and **Route**. Should get message success routing to College Review stop. . (If reviewer is not the Home Org transaction routes to the Home Org before going to the college.)
    d. 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.)
    e. Transaction appears in Staff HR **Group Inbox**. Staff HR must **Take Ownership**, review, and **Apply**.