ADOA

HRIS – Human Resources Information Solution

RESOURCE GUIDE: AGENCY HR GENERALIST - PROCESSING A JOB CHANGE

AGENCY HR GENERALIST - PROCESSING A JOB CHANGE

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Introduction

HRIS requires that a personnel action be performed any time an employee changes jobs and/or positions. A job change may be used for the following types of changes:

- COUNTER OFFER
- DEMOTION
- IN-GRADE ADJUSTMENT
- MANIFEST ERROR
- MERIT INCREASE
- PROMOTION
- SPECIAL ASSIGNMENT
- COV TO UNCOV
- EQUITY ADJUSTMENT
- LATERAL TRANSFER
- MARKET ADJUSTMENT
- PAY CHG LEGLISLATIVE
- REALLOCATION
- STEP INCREASE

Processing job changes accurately ensures that an employee receives the correct position defaults and pay for the job/position in which he/she performs. The Human Resources Agency HR Generalist / Agency HR Generalist w/ SSN performs the personnel action using the Individual Action Form (XP52.1). The JOB CHANGE action may require that a JOB CHNG 2 be performed; depending upon the type of change. **Both the JOB CHANGE and the JOB CHNG 2 actions must have the same Effective Date.** See the "Job Change Form" in the file, HRIS Forms, for a working template to use.

JOB CHANGE actions can be completed through close of business on Monday of compute week. Keying of JOB CHANGE actions can resume on Wednesday morning after compute Tuesday. HR and Payroll need to coordinate all actions affecting employee's pay to ensure the actions are processed and paid accurately.

JOB CHANGE personnel actions are entered into pending status and then updated nightly. If the action has a future effective date, the action will not process until the nightly run of the effective date of the action.

Notes

• You cannot exceed the maximum of the grade range for a Job Change. Transactions of this nature will error out during the nightly batch. If a salary will put the employee over the max, the Agency HR Manager must first perform the Pay Range Maximum Override; then the Job Change can be processed.

• On XP52.1 - If Employee information appears in the "Current Value" column that you want removed on the Employee record, you must type "*BLANK" in the "Change To" column.

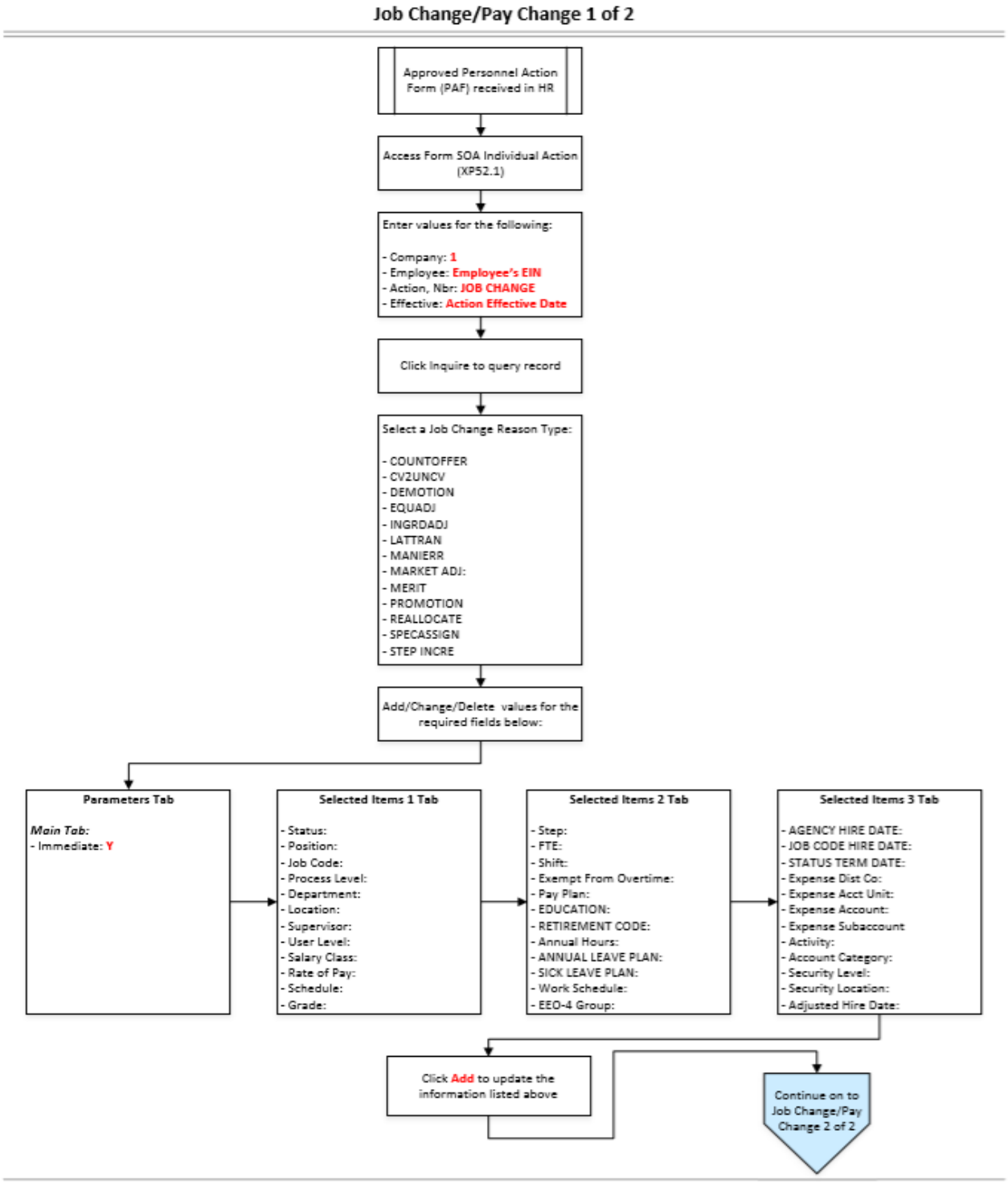
• If the position is changing, you will need to click on "Fill Defaults" to populate the position default information onto the action, e.g., supervisor, process level, department, etc. DO NOT KEY POSITION DEFAULT INFORMATION on the XP52.

• If the FTE changes, the status code should match, as well as the Annual Leave Plan, Sick Leave Plan and Work Schedule.

• When processing a personnel action, HRIS requires that a Reason Code be supplied for the action being performed. HRIS displays the results of all processed personnel actions on various management reports. Detailed information (if required) can be displayed by running the report based on selected Reason Codes.

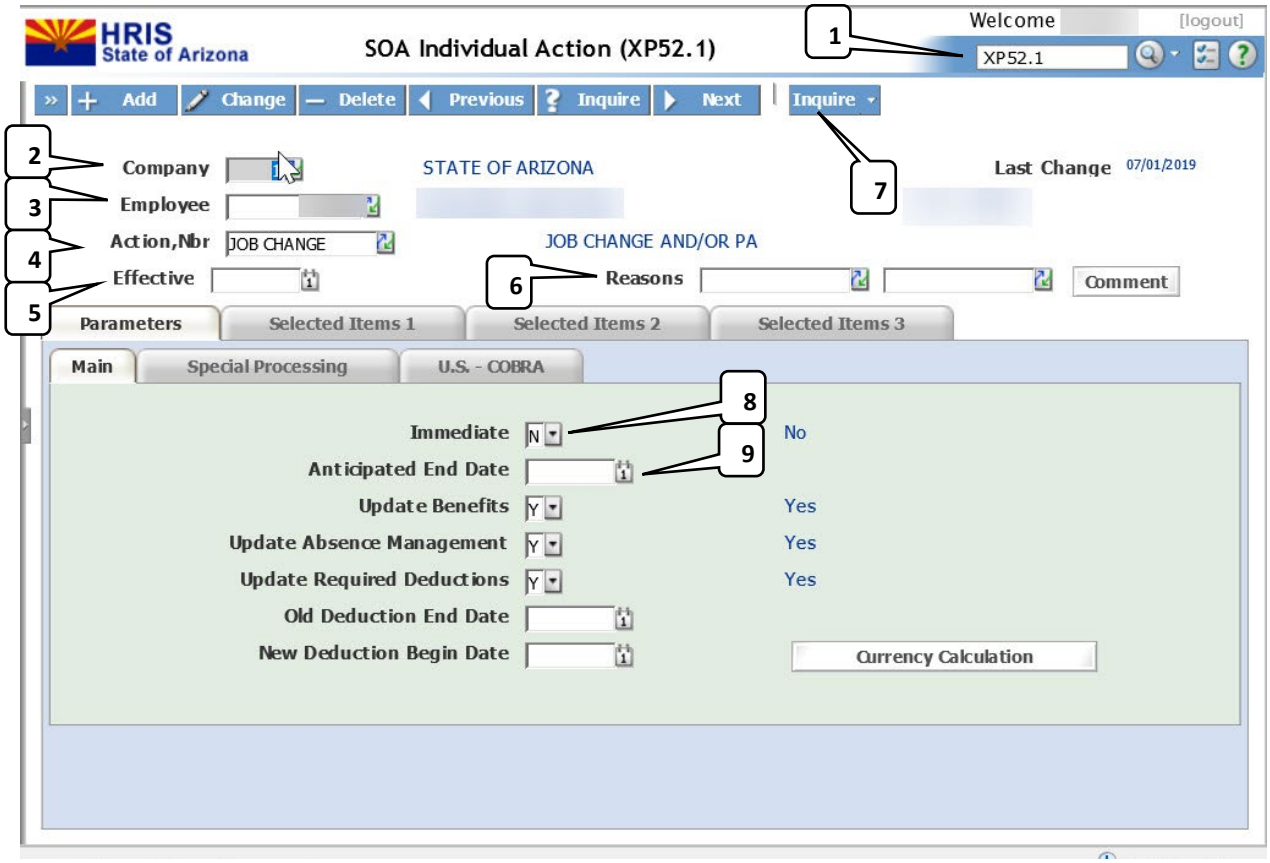
o Example - An Agency processes a Job Change on an Employee with the reason code "PROMOTION". Management requests a report that displays a list of all Employees receiving a Job Change because of a Special Assignment within that Agency over the last 6 months. The report would be run using the reason code of "SPECIAL ASSIGNMENT ".

Processing a Job Change Process Flow



Individual Action (XP52.1) Parameters Tab (JOB CHANGE) – Main Tab

(Image 1)



Steps 1-9 of 14

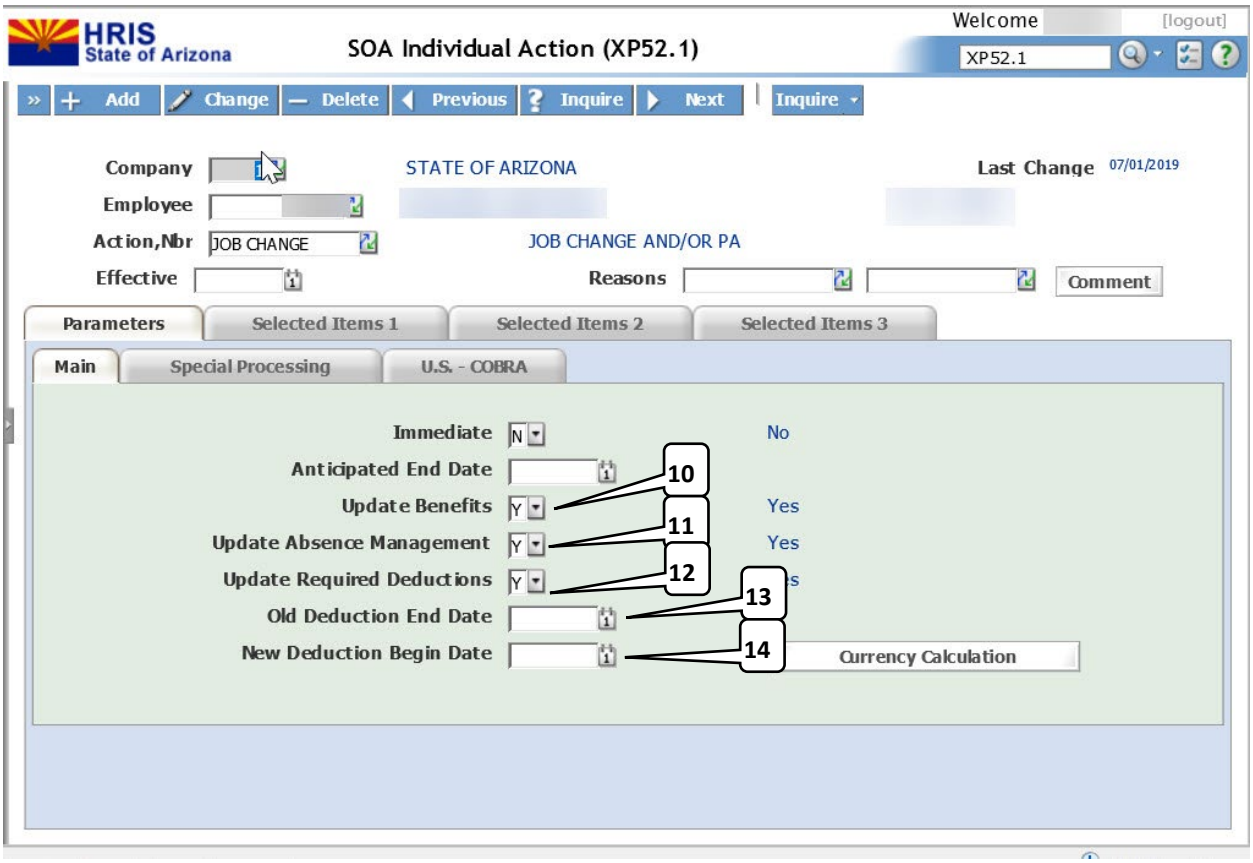
(Image 1, Table 1

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	White Search Box	R	Type **XP52.1** in the White Search Box. Press ENTER on the keyboard.	The Individual Personnel Action (XP52.1) opens.	
2	**Company** Field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	**Employee** Field	R	Type the Employee's EIN.	System will bring up needed Information from the employee's record.	You must enter the correct EIN.
4	**Action Nbr**	R	Type or use the	Based on the	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	Field		Drop Down to enter action '**JOB CHANGE'**.	Action Nbr. selected the system will populate the appropriate fields that are needed to complete this action.	
5	**Effective** Field	R	Type the Effective Date of the action.	The Effective Date of the Job Change will be in this field.	Date is formatted as MMDDYY
6	**Reasons –** First Box Field	R	Type or use the Drop Down to enter the reason code for the Job Change Action.		One reason code is required. The reason codes are smart coded. *Refer back to basics for more information on Reason Codes.
	Reasons - Second Box Field	O	Type or use the Drop Down to enter the 2nd Reason Code for the Job Change.		The 2nd Reason Code is not required but is recommended to better define the reason for the Job Change Action. It can be useful for reporting purposes.
7	**Inquire** Button	R	Click Inquire	You should get message "Inquiry Complete, add new values" in the lower left corner. The system will populate the required fields that are needed and will default all information from the Employee's record.	DO NOT CLICK Add at this point!
8	**Immediate** Field	R	Type N or select 'No' from the drop down menu in the Immediate Field.	Action will process with the nightly batch depending on the effective date of the action.	**ONLY New Hire and Rehire Actions are processed immediately**. All other HRIS Actions are processed during the nightly batch.
9	**Anticipated End** Field	R	Leave Blank	This field must be blank.	

Individual Action (XP52.1) Parameters Tab (JOB CHANGE) – Main Tab

(Image 1)



Steps 10-14 of 14

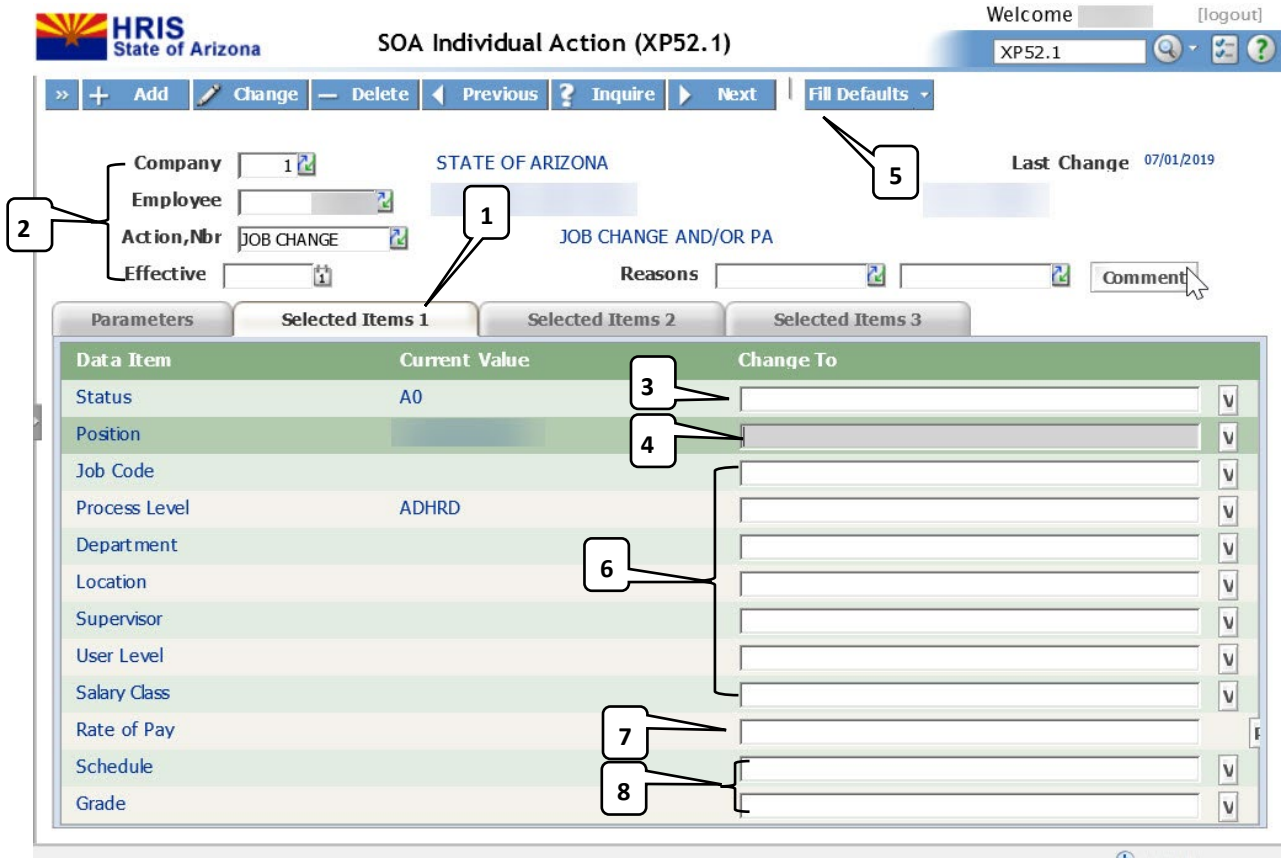
(Image 1, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	**Update Benefits** Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	Whether the employee is eligible for benefits or not, a 'Y' must be put in this field.
11	**Update Absence Management** Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
12	**Update Required Deductions** Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
13	**Old Deduction**	R	Leave Blank	When the action is	

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	End Date Field			processed the system will default in the correct date.	
14	**New Deduction Begin Date** Field	R	Leave Blank	When the action is processed the system will default in the correct date.	

Individual Action (XP52.1) Selected Items 1 Tab (JOB CHANGE)

(Image 2)



Steps 1-8 of 8

(Image 2, Table 1)

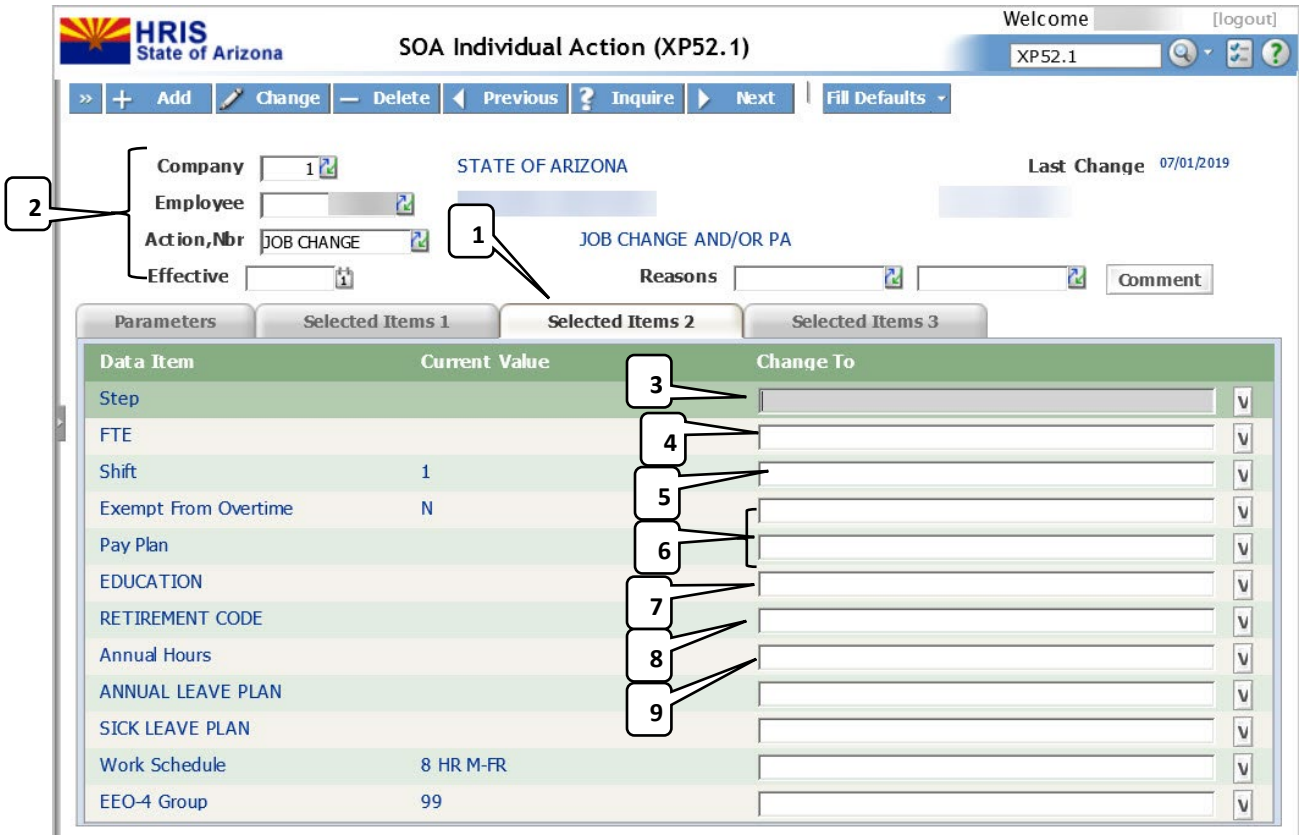
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Selected Items 1**	R	Click on the **Selected Items 1** tab.	The Selected Items 1 section will appear with the necessary fields to be populated.	Information that was imported from Employee's record will appear in the Current Value Field.
2	**Company** field **Employee** Field **Action**, **Nbr** Field **Effective Date** Field **Reasons** Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	**Status** Field	R	Type or Select from the drop down the Employee's **NEW**		To access the drop down menu, click the V at the end of the Selected Value

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			Status. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		field. *If status changes, be certain to see if Annual Leave Plan, Sick Leave Plan, and FTE fields need updating. These fields are found on Selected Items 2.
4	**Position** Field	R	Type the Employee's **NEW** Position Number **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		
5	**Fill Defaults** button	R	Click **Fill Defaults**	All information related to the position will be defaulted in. You will receive the message 'Review defaulted fields'.	**THIS IS VERY IMPORTANT**. Let the system default the information in from the position.
6	**Job Code** Field **Process** Level Field **Department** Field **Location** Field **Supervisor** Field **User Level** Field **Salary Class** Field	R R R R R R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information **must be changed on the position, not the employee**.
7	**Rate of Pay** Field	R	Type the **NEW** Rate of Pay for the Employee in the Change to field. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		Format for Rate of Pay '00.0000' If the Rate of Pay is changing and the Employee is in a Grade Range Schedule, enter the NEW Rate of Pay. Selecting the "P" button opens a form window where a % increase or decrease can be entered.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					Select the "Calculate" button to view the new pay rate. Select "Done" to close the form. The calculated new pay rate is then displayed in the "new value" field for the pay rate. For employees in a Step & Grade Schedule, this field MUST be blank.
8	**Schedule** Field **Grade** Field	R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information **must be changed on the position not the employee**. DO NOT CLICK Add at this point – go to Selected Items 2

Individual Action (XP52.1) Selected Items 2 Tab (JOB CHANGE)

(Image 3)



Steps 1-9 of 13

(Image 3, Table 1)

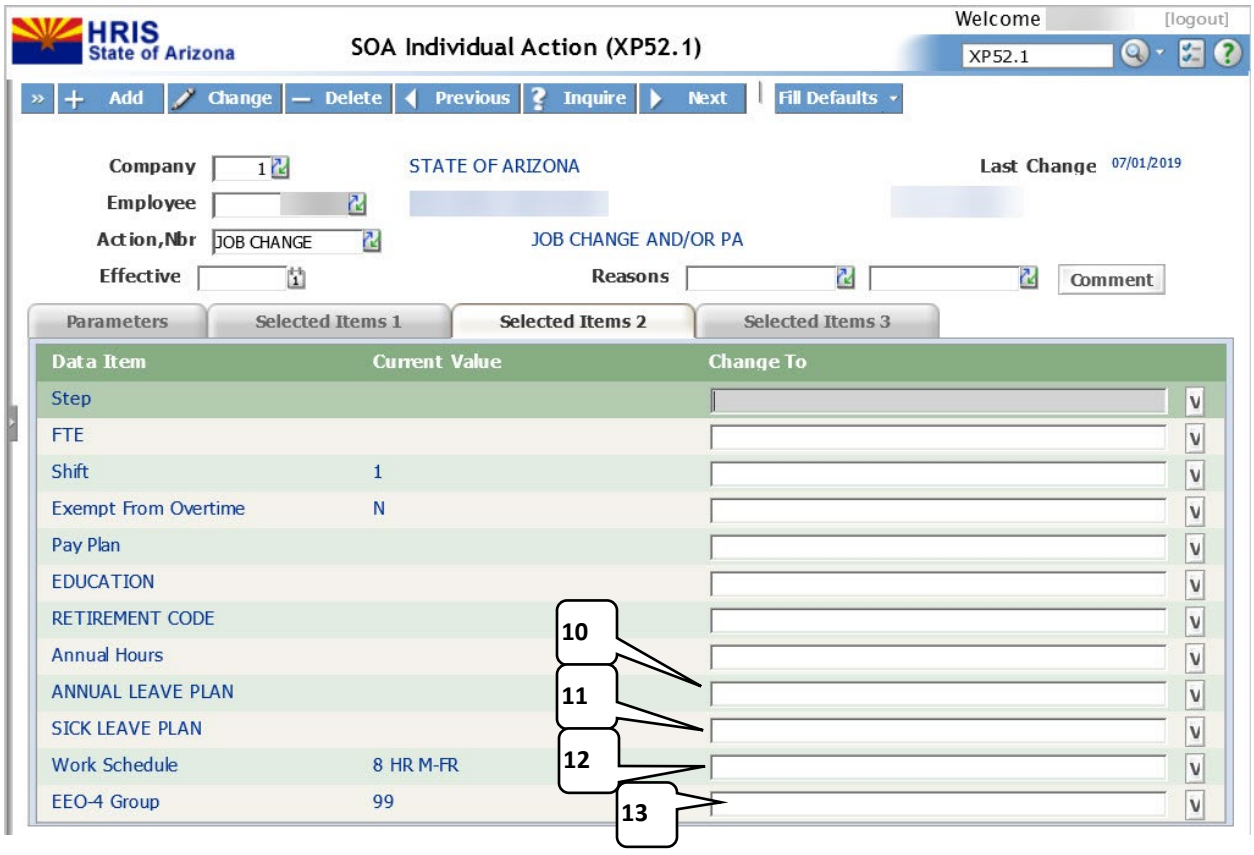
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Selected Items 2** Link	R	Click on the **'Selected Items 2'** tab.	The Selected Items 2 section will appear with the necessary field to be populated.	Information that appeared on the Employee's record will default in.
2	**Company** Field **Employee** Field **Action, Nbr** Field **Effective Date** Fld **Reasons** Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	Step Field	O	This field must be filled in IF the employee is in a Step & Grade Schedule.	All information needed from the position will be defaulted in.	The Step will drive the rate of pay for time entry and salary history.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
4	FTE Field	R	Enter the employee's NEW FTE. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		Full time =1.0, ¾ time = .75, ½ time = .50, and ¼ time = .25 These are the only acceptable values. NOTE: The FTE works with the time accrual plans and employee status. These fields must match or time accruals will not work.
5	**Shift**	R	Enter the employee's NEW Shift. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		Valid codes are 1 – day shift, 2 – second, swing or evening shift, 3 – night or graveyard shift. **Shift 2 and 3 will drive the Shift Differential Pay.**
6	**Exempt from Overtime** field **Pay Plan** field	R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information **must be changed on the position not the employee**.
7	**EDUCATION** field	O	Select the Education field as applicable for your agency.		This is an Optional Field. Field is not used by all agencies. If your agency does not have an Educational Stipend, do not enter data into this field.
8	**RETIREMENT CODE** field	R	Enter the employee's NEW Retirement Code. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		To access the drop down menu, click the V at the end of the Selected Value field. The Retirement code determines the retirement system eligibility and deduction.
9	**Annual Hours**	R	Leave default	All information	This is very important. Let

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	field		information in these fields. No Action Required.	needed from the position will be defaulted in.	the system default the information in from the position. If the information that defaulted in is not accurate, the information **must be changed on the position not on the employee**.

Individual Action (XP52.1) Selected Items 2 Tab (JOB CHANGE)

(Image 3)



Steps 10-13 of 13

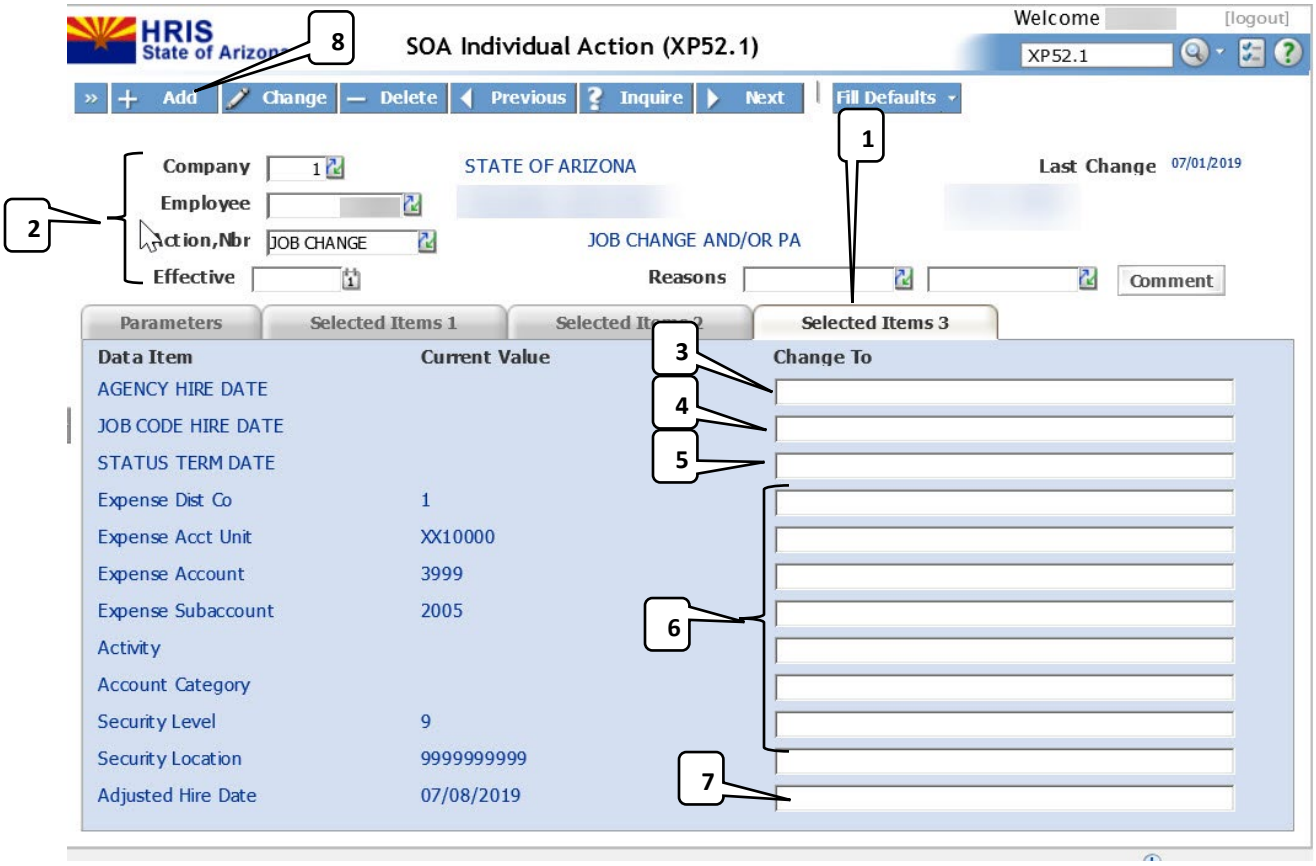
(Image 3, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	**ANNUAL LEAVE**	R	Type or Select from		The employee must be

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
	PLAN Field		the Drop Down the NEW Annual Leave Plan for the Employee. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		placed in an Annual Leave plan appropriate to their status and FTE or their time accruals will not work correctly. Example: Employee is a covered ½ time employee they should be in the Covered ½ time Annual Leave Plan.
11	**SICK LEAVE PLAN** Field	R	Type or Select from the Drop Down the NEW Sick Leave Plan for the Employee. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		The employee must be placed in a Sick Leave plan appropriate for their status and FTE or their time accruals will not work correctly. Example: Employee is a covered ½ time employee they should be in the Covered ½ time Sick Leave Plan.
12	**Work Schedule** Field	R	Type or select from the drop down menu the Employee's appropriate NEW work schedule.		
13	**EEO-4 Group** Field	R	Type the EEO-4 Functional Group for your agency. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		Valid Values are 01, 02, 03, 04, 06, 08, 09, 10, 11, 12, 14, 15, (99 for Elected Officials ONLY). See the EEO-4 Functional Groups Document to find the appropriate value for your agency. (Check the JOB CHNG 2 action and change the "Exclude From EEO-4" field, if necessary.) DO NOT CLICK Add at this point – go to Selected Items 3

Individual Action (XP52.1) Selected Items 3 Tab (JOB CHANGE)

(Image 4)



Steps 1-8 of 8

(Image 4, Table 1)

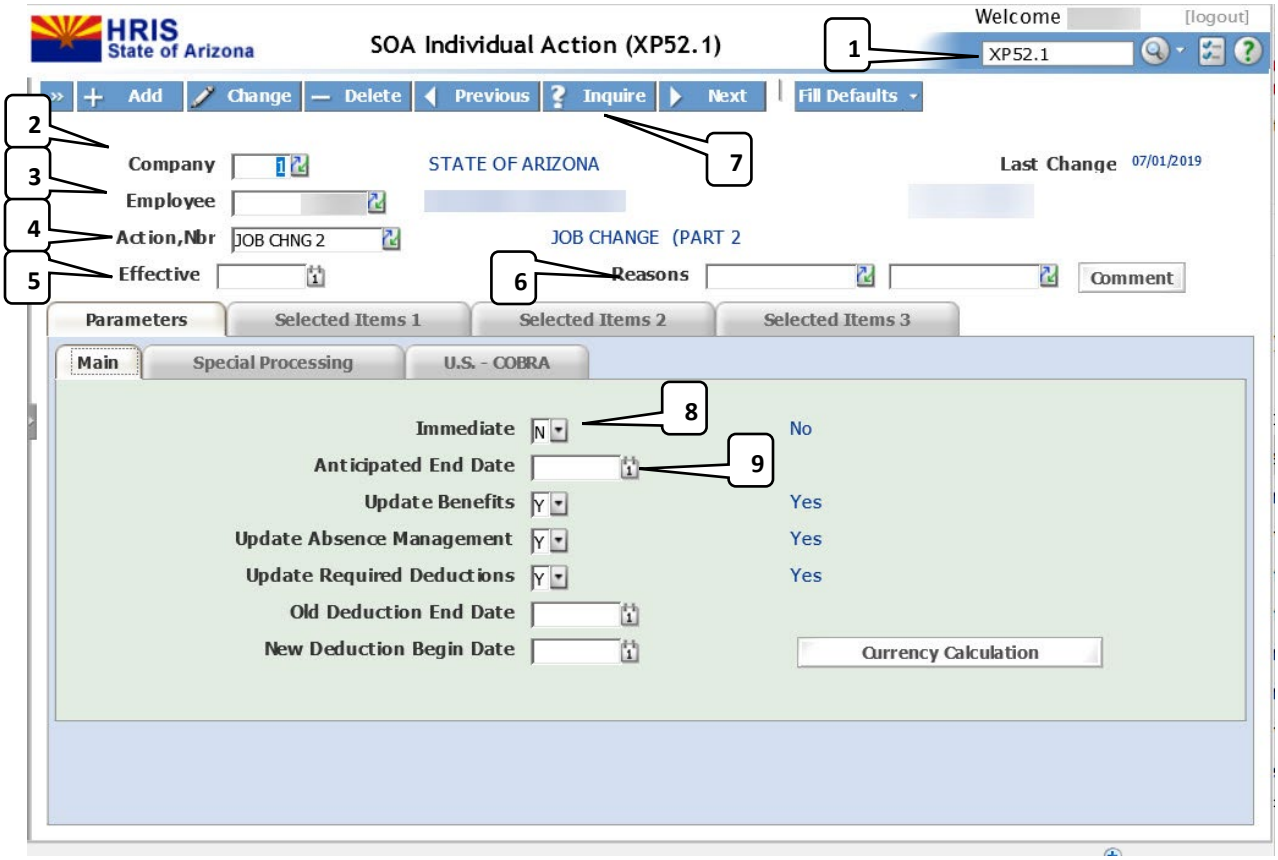
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Selected Items 3**	R	Click on the **Selected Items 3** tab.	The Selected Items 3 section will appear with the necessary field to be populated.	Information that was imported from the Employee's record will default in.
2	**Company** field **Employee** Field **Action**, **Nbr** Field **Effective Date** Fld **Reasons** Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	**AGENCY HIRE DATE** field	O	Type the NEW Agency Hire Date, if Applicable.		This is an optional date field. Key the date the Employee starts with the

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			If information displayed in the **Current Value Field is correct, no entry is required. Skip to next step.		Agency. Date format is MMDDYY.
4	**JOB CODE HIRE DATE** field	O	Type the NEW Job Code Hire Date. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		This is an optional date field. This is the date the employee was hired into the current Job Code. Date format is MMDDYY.
5	**STATUS TERM DATE** field	R / O	Type the NEW Status Term Date, if applicable for the Employee Status. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		Enter a date in this field if the employee is put in a status that is due to change by/on a certain date. Examples – Special Assignment, Probationary Status
6	**Expense Dist Co** Field **Expense Acct Unit** Field **Expense Account** Field **Expense Sub-Account** Field **Activity** Field **Account Category** Field **Security Level** field **Security Location** field	R R R R R R R R	Leave default information in these fields. No Action Required.	All information needed from the position will be defaulted in.	This is very important. Let the system default the information in from the position. If the information that defaulted in is not accurate, the information **must be changed on the position, not the employee**.
7	**Adjusted Hire Date** field	R	Type the NEW Adjusted Hire Date. If value has not changed, no entry is required in the Change to field.		Date format is MMDDYY. Contact the HRIS Help Desk Payroll Option to correct the dates eligible for time accrual. If you do not, the employee will not accrue at the

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
					correct rate.
8	**Add** button	R	Click Add	Message in lower left corner "Add Complete; continue."	

Individual Action (XP2.1) Parameters Tab (Job CHNG 2) – Main Tab

(Image 5)



Steps 1-9 of 14

(Image 5, Table 1)

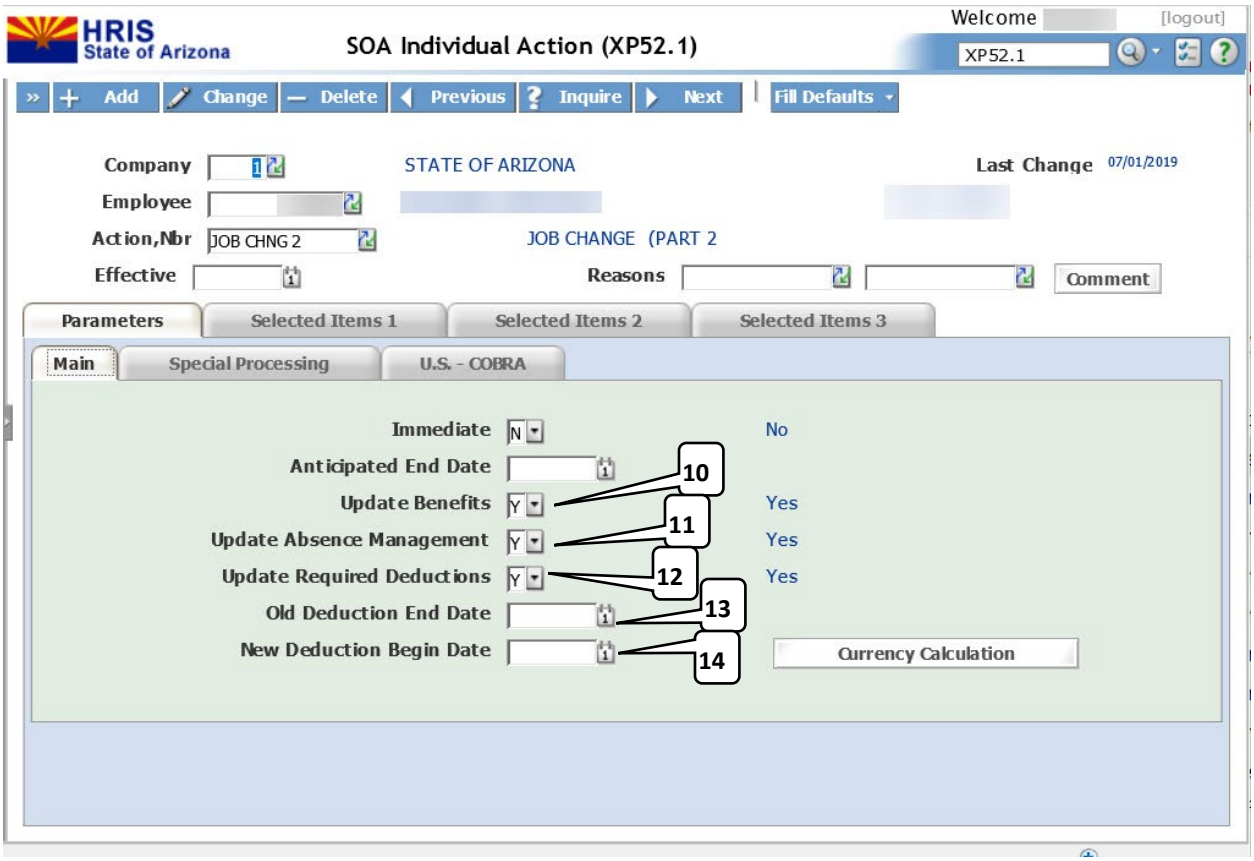
No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	White Search Box	R	Type **XP52.1** in the White Search Box. Press ENTER on the keyboard.	The Individual Personnel Action (XP52.1) opens.	
2	**Company** Field	R	Type 1 in Company	System will access	All forms/actions must

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			field.	information for Company 1.	contain a 1 in the Company Field.
3	**Employee** Field	R	Type the Employee's EIN.	System will bring up needed information from the prior two actions.	You must enter the correct EIN.
4	**Action Nbr** Field	R	Type or use the Drop Down to enter action '**JOB CHNG 2'**.	Based on the Action Nbr. selected the system will populate the appropriate fields that are needed to complete this action.	
5	**Effective** Field	R	Type the Effective Date of the action.	The Effective Date of the Job Change will be in this field.	Date is formatted as MMDDYY. Effective date **must** be the SAME date as the date used in the JOBCHNG action.
6	**Reasons** – First Box Field	R	Type or use the Drop Down to enter the reason code for the Job Change Action.		One reason code is required. The reason codes are smart coded.
	Reasons - Second Box Field	O	Type or use the Drop Down to enter the 2nd Reason Code for the Job Change.		The 2nd Reason Code is not required however it can be used to better define the reason for the Job Change Action. It can be useful for reporting purposes.
7	**Inquire** Button	R	Click Inquire	You should get message "Inquiry Complete, add new values" in the lower left corner. The system will populate the required fields that are needed and will default all information from the Employee's record.	DO NOT CLICK Add at this point!

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
8	**Immediate** Field	R	Type N or select 'No' from the drop down menu in the Immediate Field.	Action will process with the nightly batch depending on the effective date of the action.	**Only New Hire and Rehire actions are processed immediately**. All other HRIS Actions are processed during the nightly batch.
9	**Anticipated End** Field	R	Leave Blank	This field must be blank.	

Individual Action (XP2.1) Parameters Tab (Job CHNG 2) – Main Tab

(Image 5)



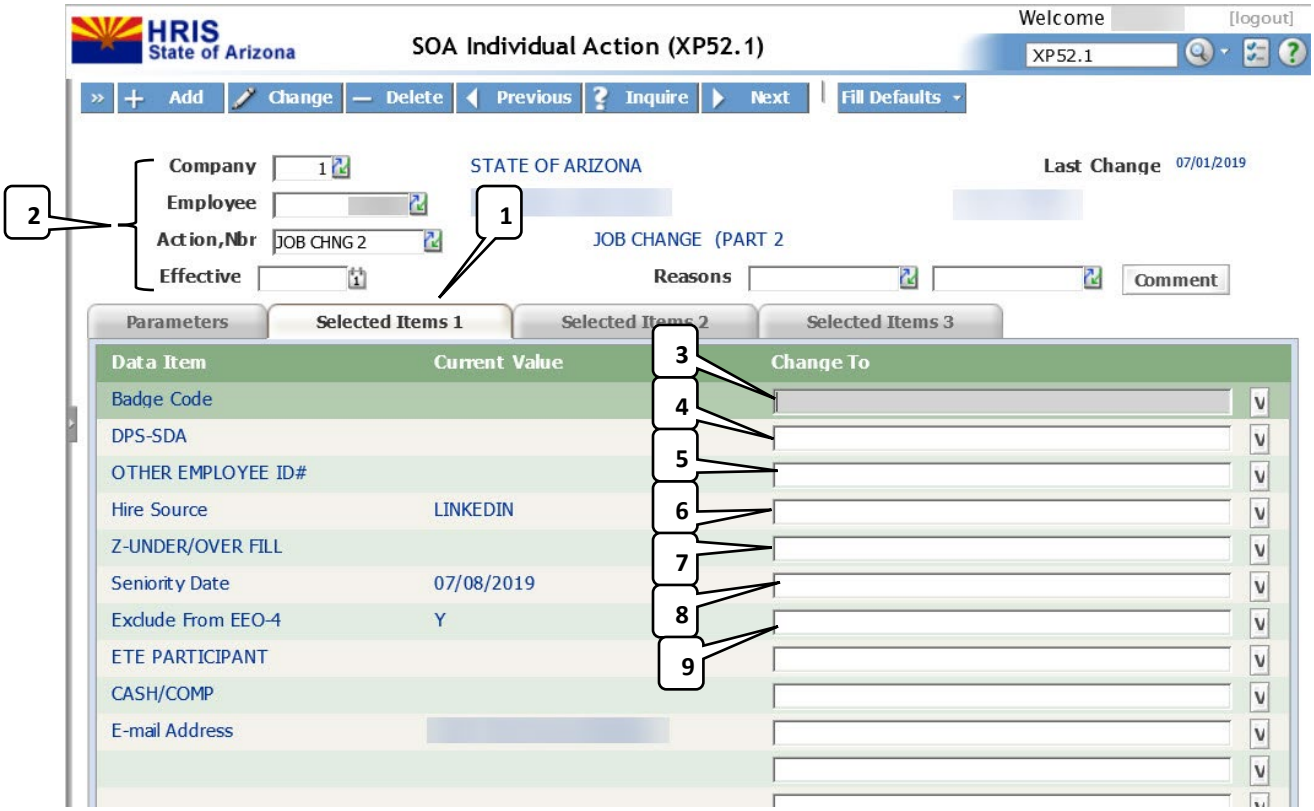
Steps 10-14 of 14

(Image 5, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	**Update Benefits** Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	Whether the employee is eligible for benefits or not, a 'Y' must be put in this field.
11	**Update Absence Management** Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
12	**Update Required Deductions** Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	
13	**Old Deduction End Date** Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
14	**New Deduction Begin Date** Field	R	Leave Blank	When the action is processed the system will default in the correct date.	

Individual Action (XP52.1) Selected Items 1 Tab (JOB CHNG 2)

(Image 6)



Steps 1-9 of 13

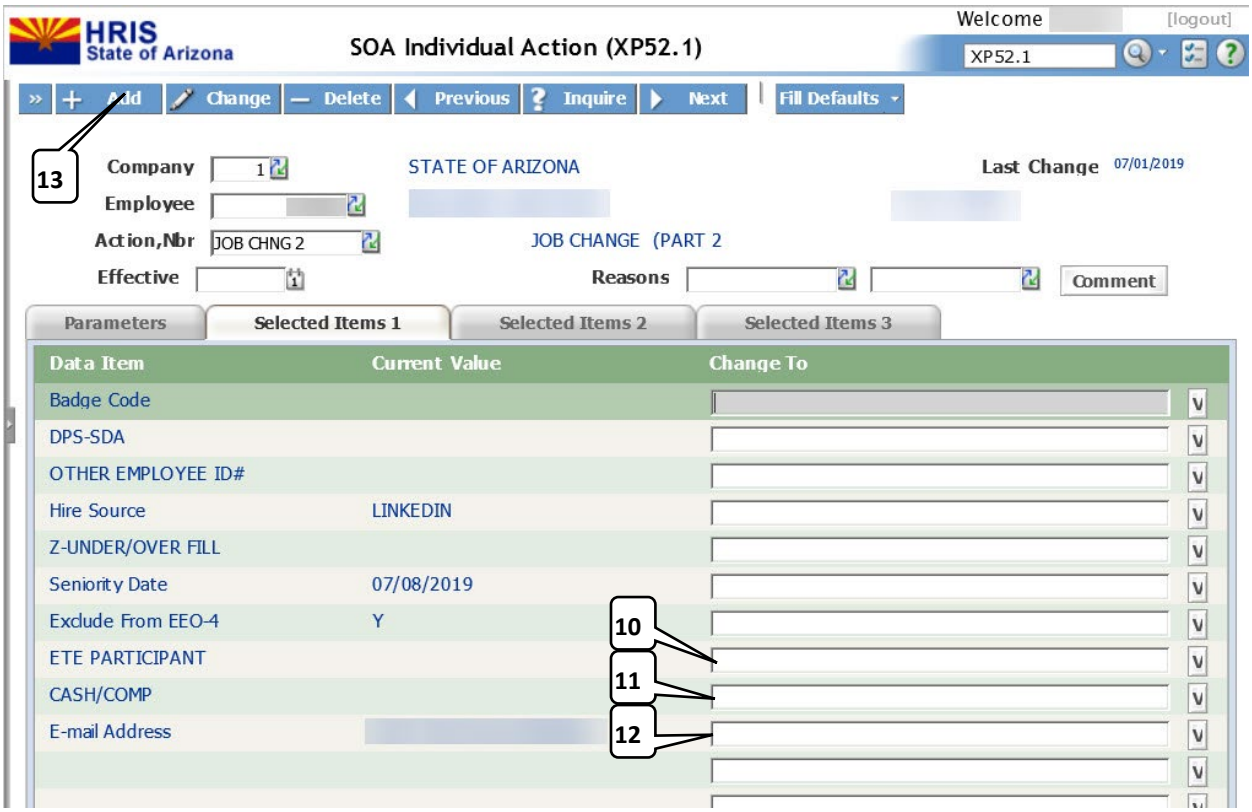
(Image 6, Table 1)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
1	**Selected Items 1**	R	Click on the **Selected Items 1** tab.	The Selected Items 1 section will appear with the necessary fields to be populated.	Information that was imported from Employee's record will appear in the Current Value Field.
2	**Company** field **Employee** Field **Action, Nbr** Field **Effective Date** Field **Reasons** Fields	R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
3	**Badge Code** Field	O	Type in the Employee's NEW Badge Code if applicable for your		This is an optional field.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
			agency. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		
4	**DPS-SDA** Field	O	This is an optional field used by specific agencies.		
5	**OTHER EMPLOYEE ID#** Field	O	Type the NEW Other Employee ID# if applicable for your agency. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		
6	**Hire Source** Field	O	**If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		This is an optional field.
7	**UNDER/OVER FILL** Field	O	Leave this field BLANK		
8	**Seniority Date** Field	O	The Seniority Date will default from the Employee's record. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		The Seniority Date drives AUTOPAYADV actions for Correctional Officers.
9	**Exclude From EEO-4** Field	R	Type in a "Y" or "N" as appropriate.		In most cases, an employee will have "N" in this field.

Individual Action (XP52.1) Selected Items 1 Tab (JOB CHNG 2)

(Image 6)



Steps 10-13 of 13

(Image 6, Table 2)

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
10	**ETE Participant** Field	R	Type Y or * Blank		Type the new value for the data item. If the field has a current value but you want it to be blank type *BLANK. The data item in the field is validated as it is validated in HR11.1 (Employee).
11	**CASH/COMP** Field	R	Enter the employee's NEW CASH/COMP Code. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		To access the drop down menu, click the V at the end of the Selected Value field.

No.	HRIS Field	Required (R) Optional (O)	Step / Action	Expected Results	Notes / Additional Information
12	**E-mail Address** Field	R	Enter the employee's **NEW** E-mail Address. **If information displayed in the **Current Value** Field is correct, no entry is required. Skip to next step.		
13	**Add** button	R	Click Add	Message in lower left corner "Add-Complete; continue".	