State of Oklahoma
COR301 Part II
Hiring & Maintaining Employee Information Manual

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HIRING AND MAINTAINING EMPLOYEE INFORMATION

HR COURSE P301 – PART II

OBJECTIVES

At the completion of this course you will be able to:

1. Hire a new employee in PeopleSoft and **enter** information into the following pages:
   - Personal Data, including Name, Address, Phone numbers, Ethnic Group, and SSN
   - Job Data, including position, work location, longevity date, and compensation.
   - Benefit program participation.
2. Add a concurrent job to an existing employee (Multiple Job)
3. Make Changes to Personal Data
   - Name Change
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   - Job Change With Position Number Change
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HIRE AN EMPLOYEE

The Hire component is used for a new employee; an employee who has never been in the PeopleSoft System for the State of Oklahoma. To determine if an employee has been hired into the Oklahoma PeopleSoft System, please contact your HR Liaison at the Office of Personnel Management, (OPM). If OPM indicates the employee has an employment record in PeopleSoft, the Rehire process must be followed on page 131 of this manual.

OVERVIEW

Essential employee data must be entered into the system before managing any human resource activity for employees. Once entered, you can input additional employee data and track a complete work history for each employee.

Many of the pages you will use when you hire an employee are the same pages you will use later to update information on existing employees.

The following is a summary of the components to be used during the hiring process. Most required fields are preceded by an asterisk in the system and must be filled in before saving the component.

To hire an employee you will progress through the Personal Data, Job Data, Employment Data, Earnings Distribution and Benefits Program Participation pages. ***You will save your data only after you have completed all the pages.***

The following tables describe the components that will be used during the hire process.

Page Name	Page Description
Personal Data	
Name	Employee's Primary and Secondary Names.
Address	Home address, mailing address, email and phone numbers.
Personal History	Gender and Marital Status
Identity / Diversity	Date of Birth, Social Security Number and Ethnic Group

Job Data

Work Location	Employee Status, Action/Reason, Job Indicator, Position Number, Company, Department, Location, and Establishment ID.
Job Information	Job Code, Employee Class, Standard Hours, Work Period, Regular/Temporary, Full/Part-time, FLSA status, and Work Day Hours
Payroll	Pay Group, Holiday Schedule, Tax Location Code, FICA Status, Tipped and Employee Type
Salary Plan	Salary Administration Plan, Grade and Step
Compensation	Rate Code, Comp Rate, Currency and Frequency
MDC Job Data	Division, Worker's Comp Code, Special Use Fields and Date, Cost Center, and Remarks

Employment Data

Employment Information	Probation Date, Longevity Date, Service Date, Company Seniority Date and Time Reporter Data Link

Earnings Distribution

Job Earnings Distribution	Earnings Distribution Type, Account Code, and Distribution Percentage

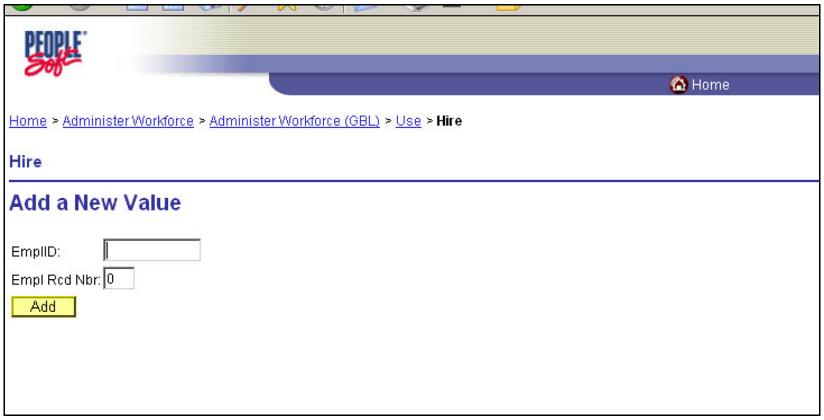
Benefits Program Participation

Benefit Program Participation	Effective Date and Benefit Program

STEP I – NAVIGATE TO THE HIRE COMPONENTS

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Hire*

The system will display the following:



EmplID – Leave blank - the system automatically assigns the next available Employee ID.

Empl Rcd Nbr – Leave at "0" to indicate this is the primary job record.

Click Add to continue. The **Personal Data** pages will be displayed (Name History, Address History, Personal History, and Identity/Diversity)

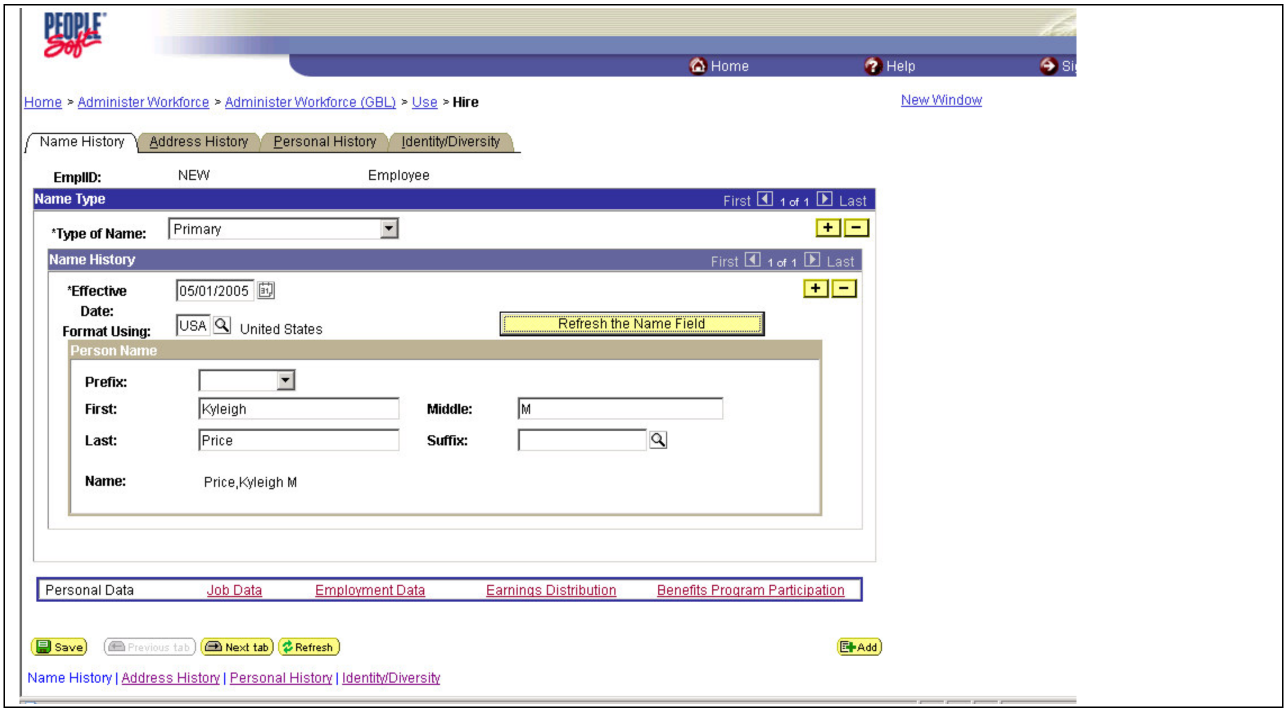
NOTE: When accessed through the Hire process, this component is grouped together with the Job Data component. However, any of these components may be accessed individually at any time.

The Personal Data component is used to record and access personal information about employees. Many components and processes elsewhere within PeopleSoft reference the data stored on the Personal Data component.

STEP II – ENTERING PERSONAL DATA INFORMATION

NAME HISTORY PAGE

The Name History page allows you to enter your new employee's personal information.



NOTE: All fields marked with an asterisk (*) are required. A value must be entered before the system will allow you to save the record. For consistency, it is REQUIRED that mixed case be used for all data entry. The PeopleSoft system is case sensitive.

EmplID – This field is display only. The EmplID will appear as **NEW** and will become the employee identification number assigned automatically by PeopleSoft after all the Hire components pages have been completed and the information has been saved, by **clicking** Save.

***Type of Name** – Defaults to 'Primary'. Secondary names may also be entered.

***Effective Date** - Reflects the date the employee's name and address becomes effective. For the hire process, the first day the employee will be compensated is the Date of Hire. The effective date of hire must be entered on all the pages requiring this information on the Personal Data component.

Format Using – Defaults to 'USA'.

Prefix – This field has a dropdown list. You may choose a pre-defined prefix title - options include Miss., Mr., Mrs., Ms., or Dr. (Optional).

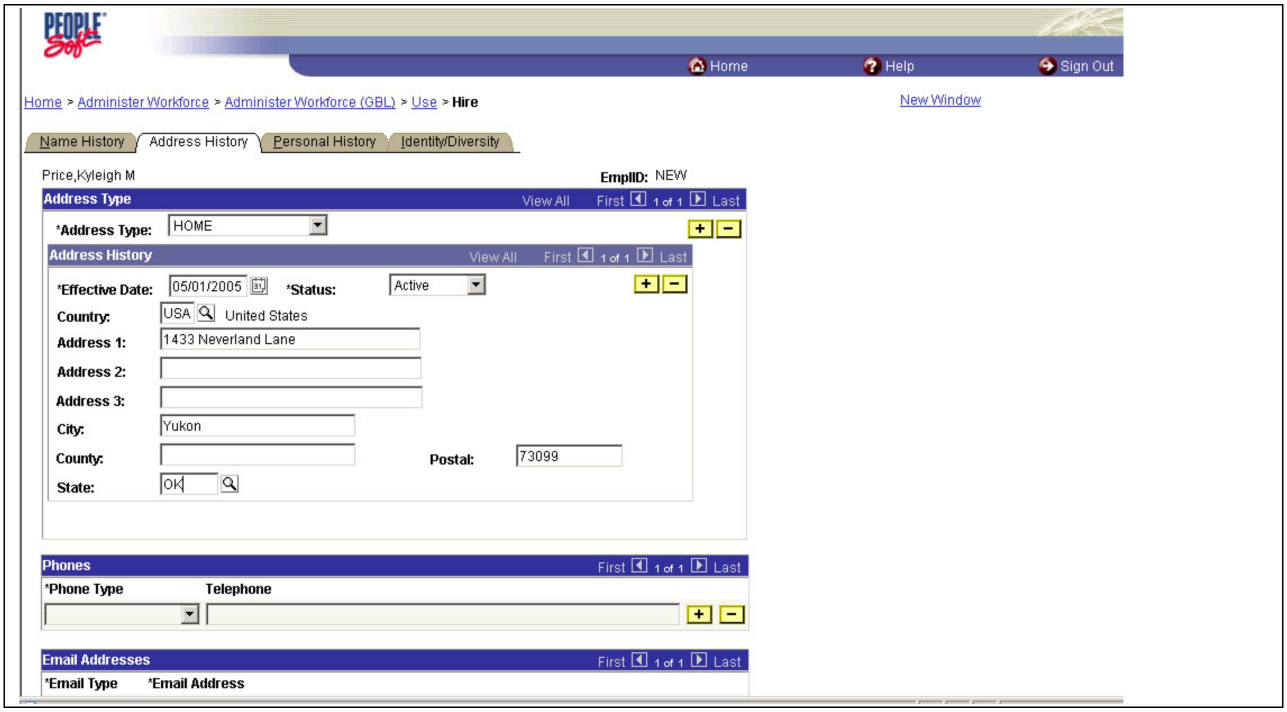
Enter the employee's **First, Middle** and **Last Names** in the edit boxes. When entering Name information, DO NOT USE PUNCTUATON. PeopleSoft requires only that a first and last name be entered. Prefix, middle name or initial, and suffix is optional. Do not put a comma after the last name (i.e.: Smith, Jr.); the junior should be entered in the Suffix field and PeopleSoft will automatically format the name appropriately.

Refresh the Name Field - **Click** Refresh the Name Field and PeopleSoft will automatically **enter** the employee's name in the **Name** field.
Example: Ray Brown will populate as Brown, Ray.

NOTE: This is an important step to remember. The 'Refresh the Name Field' button creates a search record for this employee and will allow you to be able to search on this employee's name throughout the system.

ADDRESS HISTORY PAGE

Click the 'Address History' Tab. This page will contain the new employee's address, phone, and email information.



Enter information in the following fields:

***Address Type** – **Select** the appropriate address type, e.g., Home or Mail. **Every employee must have a Home address for Payroll processing.**

***Effective Date –** For the Hire process this date should be the first day the employee will be compensated. **Enter** the date of hire.

***Status –** Defaults to 'Active'

Country – Defaults to 'USA'

Address – Enter the employee's street, city, county, postal, and state information. Do not use punctuation in abbreviations (i.e.: use St or NW instead of St. or N.W.). Address information should be entered in Mixed Case, the same as Name information.

County – **Enter** the numeric County ID**. NOTE:** All Hires must have an Oklahoma home address for payroll taxes, (see Oklahoma County Table Number below).

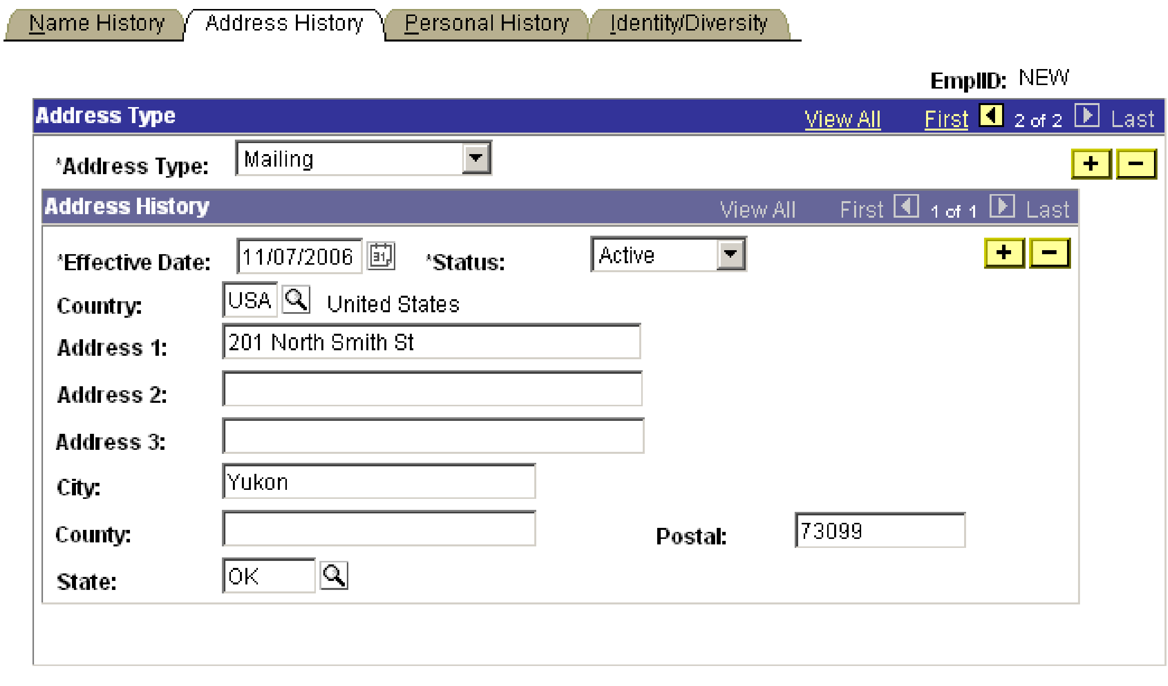
Oklahoma County Number Codes

01 Adair	14 Cleveland	27 Grant	40 LeFlore	53 Nowata	66 Rogers
02 Alfalfa	15 Coal	28 Greer	41 Lincoln	54 Okfuskee	67 Seminole
03 Atoka	16 Comanche	29 Harmon	42 Logan	55 Oklahoma	68 Sequoyah
04 Beaver	17 Cotton	30 Harper	43 Love	56 Okmulgee	69 Stephens
05 Beckham	18 Craig	31 Haskell	44 McClain	57 Osage	70 Texas
06 Blaine	19 Creek	32 Hughes	45 McCurtain	58 Ottawa	71 Tillman
07 Bryan	20 Custer	33 Jackson	46 McIntosh	59 Pawnee	72 Tulsa
08 Caddo	21 Delaware	34 Jefferson	47 Major	60 Payne	73 Wagoner
09 Canadian	22 Dewey	35 Johnston	48 Marshall	61 Pittsburg	74 Washington
10 Carter	23 Ellis	36 Kay	49 Mayes	62 Pontotoc	75 Washita
11 Cherokee	24 Garfield	37 Kingfisher	50 Murray	63 Pottawatomie	76 Woods
12 Choctaw	25 Garvin	38 Kiowa	51 Muskogee	64 Pushmataha	77 Woodward
13 Cimarron	26 Grady	39 Latimer	52 Noble	65 Roger Mills	

ADDING AN ADDITIONAL ADDRESS

To add an additional address (for example, the HOME address has been entered and you wish to add a MAILING address) **click** [+] within the Address Type frame.

A new address page will be displayed as shown below:

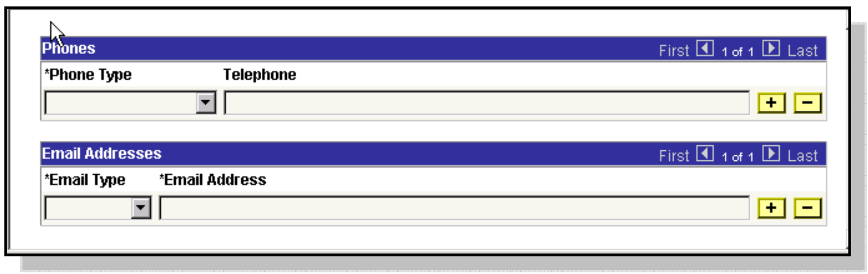


NOTE: the Address Type scroll bar will now indicate that you are viewing the second record of two existing records. Click the 'Back Arrow' to view the previous record, the <u>First</u> link to view the first record in a list of records, or the <u>View All</u> link to view all the records at one time. The system default view will be the most current record.

- Once the new row has been added, change the 'Address Type' to the appropriate selection and continue by following the directions given on the previous page.
- **Enter** USA in the 'Country' field and tab out to make the address fields available for update.

NOTE: If an employee wants an earning statement to go to a different address than Home, this must be overridden in Payroll Data on the Payroll segment.

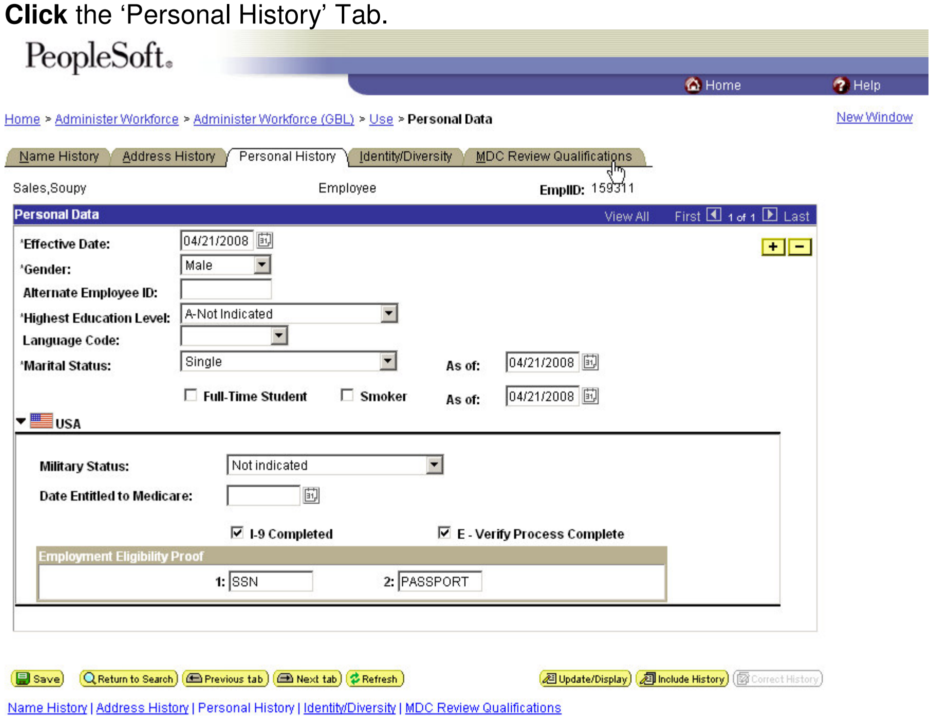
Phone Type and **Email Type** – Use the drop down arrow to **select** the appropriate type and the edit box to enter information. You can add additional 'Phone Numbers' and 'Email Addresses' by using the 'Insert Row' + button. Phone numbers and Email addresses are not required, but if you choose to enter this information the Phone *Type* and Email *Type* are required.



NOTE: PeopleSoft will format the Phone Number for you. Enter all digits (ex: 4051112222); the system will format the number to be 405/111-2222. The system will not format the number if alpha-numeric values are entered, e.g. 4051112222 ext 215.

PERSONAL HISTORY PAGE

Click the 'Personal History' Tab.



Enter information in the following fields:

***Effective Date** – **Enter** the date of hire.

***Gender** – This field defaults to 'Unknown', **click** ▼ to change to the appropriate selection. Must **enter** a value of Male or Female. **This value impacts EEO reporting**.

***Highest Education Level** – Optional

Language Code – **Select** the employee's native or preferred language (Optional)

***Marital Status – Select** the employee's marital status. When a marital status is changed, the default "As Of" date is the same as the Personal Data "Effective Date".

NOTE: PeopleSoft Payroll does not use the marital status on this page for tax calculations.

USA Flag

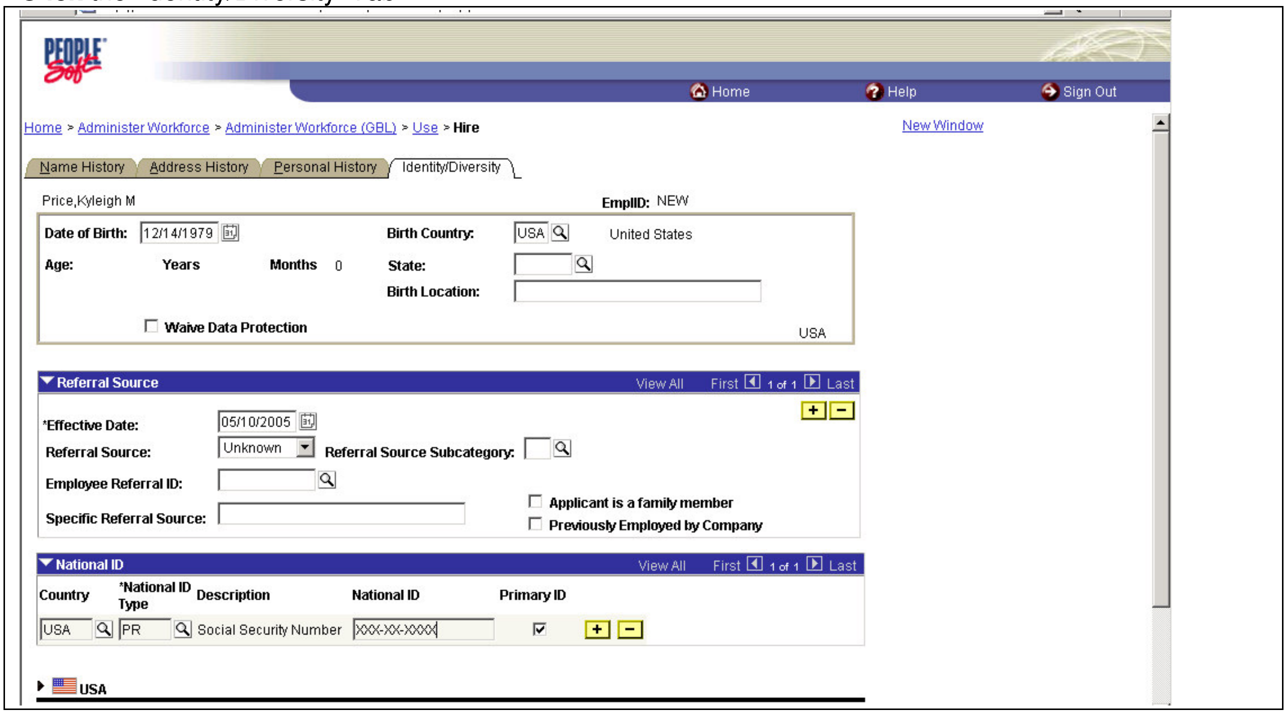
Military Status – **Select** the appropriate value from the drop down list.

Employment Eligibility Proof – Indicate the types of documents furnished for the I-9. Be consistent in the way each type of document is indicated. For example, if a Driver License is one of the documents furnished, do not enter 'DL' in one record and 'dr lic' in another. Each agency must standardize its entries in these fields.

E-Verify Process – The E-Verify process must be completed. However, the process can be completed within 10 days from the date of hire, if necessary.

IDENTITY / DIVERSITY PAGE

Click the ‘Identity/Diversity’ Tab.



Enter information in the following fields:

Date of Birth – Enter the employee's date of birth. If this field is left blank, a warning message appears when the record is saved. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate an employee's age in some benefit and payroll tasks. Therefore, it is a required field for the State of Oklahoma.

Date of Death: If a person dies, you will put the actual date of death on this page. The field will appear after a Termination Action with the Reason of Death (S04) has been put on the Job Record. The termination date is the same as any termination, the first day the employee does not get paid; however, the Date of Death on the Personal Data – Identity/Diversity page is the actual date of death.

Country – Defaults to USA

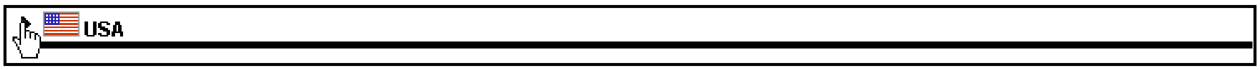
***National ID Type –** Defaults to 'PR' from National ID Type Table.

*National ID** – **Enter** employee's social security number. If the system issues a message that another employee has the same National ID, **STOP!** Call your OPM liaison to determine the next steps.

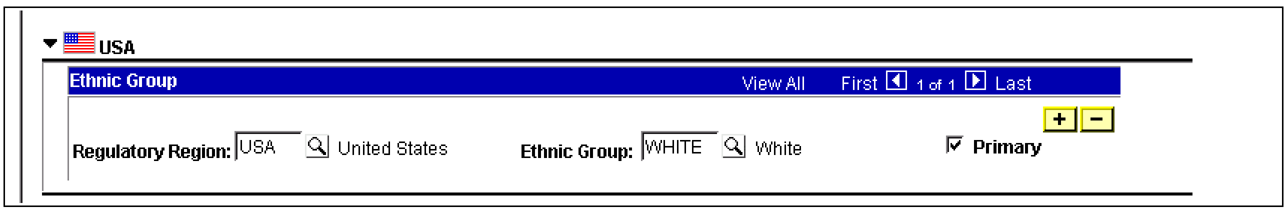
NOTE: PeopleSoft will allow only one specific social security number per employee.

Primary ID – defaults to checked.

Select the dropdown arrow next to the USA Flag to **enter** Ethnic information.



The following dropdown box will be displayed:



Ethnic Group – For EEO Reporting purposes, it is recommended to agency users they complete this field as accurately as possible. It is NOT mandatory for State employees to declare an Ethnic Group. More than one Ethnic Group may be identified; however, only one will be Primary. Make the appropriate selection from the dropdown box. The Ethnic Group field is NOT effective dated, meaning an agency user can correct or complete the ethnicity of an employee at any time without a Help Desk case.

The MDC Review Qualifications tab is not applicable for a new hire.

Congratulations – you have completed the Personal Data pages. It is now time to **enter** the new employee's job information.

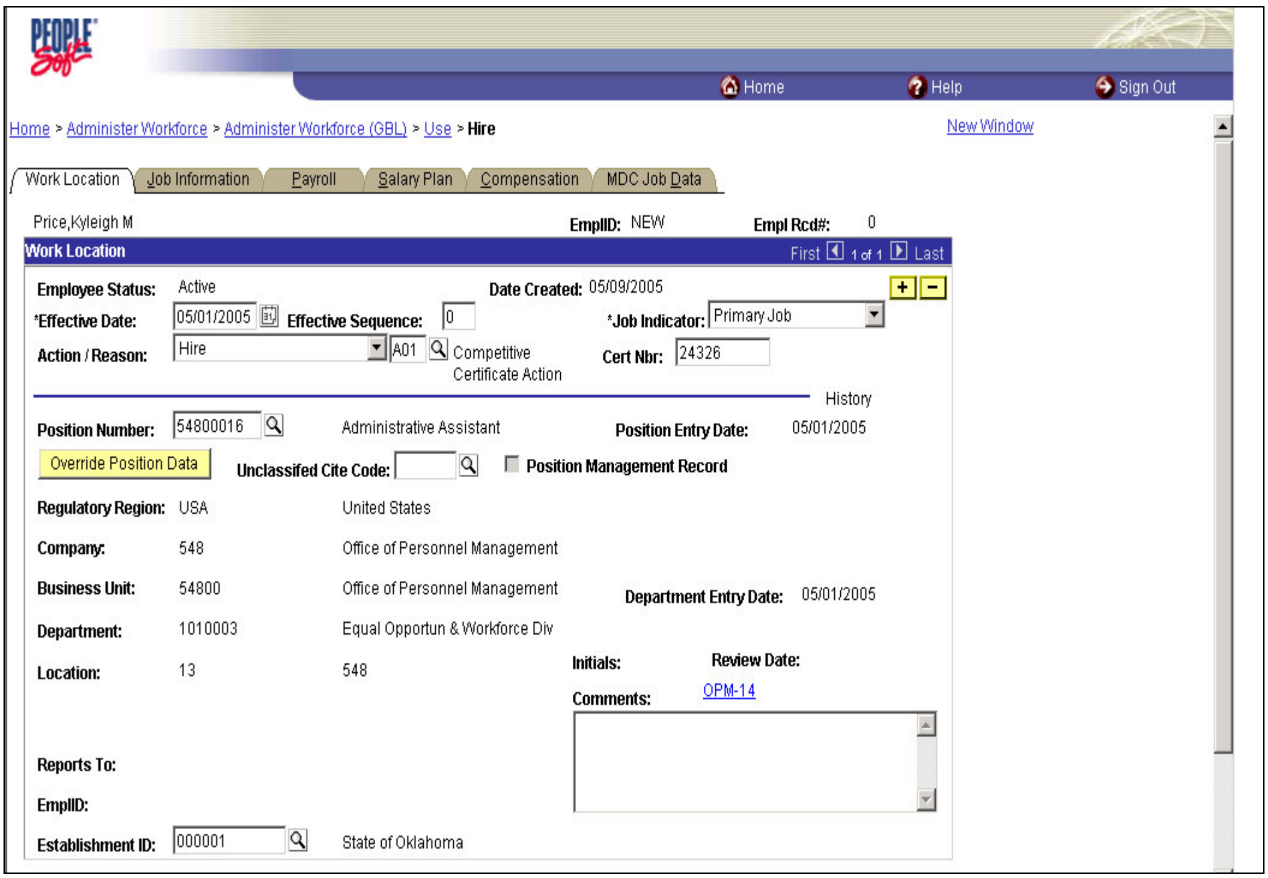
NOTE: The record cannot be saved until all links associated with the Hire process and all required fields are completed (Personal Data, Job Data, Employment Data, Time Reporter, Earnings Distribution, and Benefits Program Participation).

STEP III – ENTERING JOB DATA INFORMATION

Select the Job Data link from the bottom of the page to access all the Job Data components.

The Job Data component consists of the following pages: Work Location, Job Information, Payroll, Salary Plan, Compensation, and MDC Job Data.

WORK LOCATION PAGE



Enter information in the following fields:

Employee Status and **Date Created** – Default

***Effective Date –** When an employee is hired, the effective date entered here becomes the hire date.

Effective Sequence – Defaults to “0” – Use this number to track multiple transactions that occur on the same day.

***Job Indicator –** Defaults to 'Primary Job' and indicates whether this is the employee's primary or secondary job.

Action – Defaults to 'Hire'. Every employee must have one HIRE row.

Reason – **Enter** the appropriate value. The following reason codes are active for a Hire action:

Action	Reason (Transaction/Code)
Hire	A01 Certificate Appointment
	A02 Non-competitive Certificate Appointment
	A03 Reinstatement
	A08 Project Indefinite
	A09 SB 200 (Veterans Act)
	A12 Appointment Special Handicapped (HB1340)
	A14 Unclassified Appointment
	A15 Unclassified Student
	A16 Temporary Unclassified
	A17 Tourism Unclassified Project Appointment
	A19 State Work Incentive Program
	A88 Direct Hire – Professional License
	A89 Direct Hire – Hard to Fill

Cert Nbr – The State Certificate Number is required when using Reasons '**A01**' or '**A02**' with the Hire or Rehire action. The State Certificate Number is not applicable to any other Action/Reason.

Position Number – Use the mouse to position the cursor in the Position Number field. **Enter** the appropriate position number. When you tab out of the Position field, the system automatically defaults related fields throughout the Job Data component pages which include the following pages:

Work Location Page
- Company
- Business Unit
- Department
- Location
- Position Entry Date
- Department Entry Date
- Establishment ID (this does not populate automatically; it is a required field and you must **enter** this before saving the record).

Job Information Page
- Job code
- Reg/Temp
- Full/Part Time
- Standard Hours
- FLSA

Salary Plan Page
- Salary Administration Plan
- Grade and Grade Entry Date if the position is classified
- Grade Entry Date

Unclassified Cite Code – required for all 'Unclassified' hires. The value for this field will default from the Position Number. This field can be overridden if needed.

Establishment ID: The establishment ID is a required field must be entered at the bottom of the page. At the present time it is: 000001 State of Oklahoma.

Alternate Hire Note: If this is an Alternate Hire(the employee is assigned a lower level of the Job Family than the level assigned to the position), it will be necessary to click the Override Position Data button so the correct Job Code can be entered on the Job Information Tab.

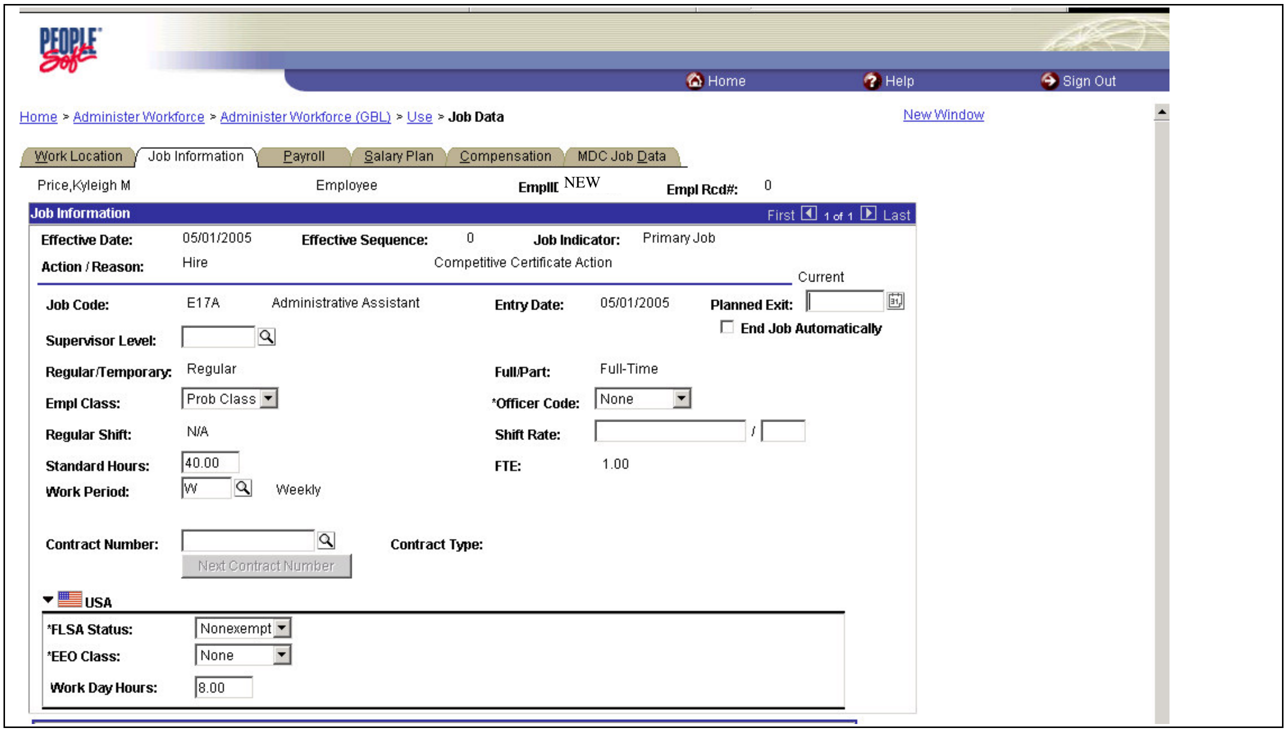
NOTE: When working in a new row, the Override Position Data button on the Work Location Tab will be illuminated. Clicking this button allows changes to the fields that defaulted from the position information. The button is displayed only on the Work Location page, even though some of the information that may be overridden is entered on subsequent pages.

If the button is labeled Use Position Data, this indicates that the Override function has been invoked in a previous row.

The Override Position Data function remains in effect in subsequent rows until the Use Position Data function is invoked or the position number is changed.

JOB INFORMATION PAGE

Click the 'Job Information' Tab.



Enter information in the following fields:

***Job Code** – Defaults from the 'Position Number' selected earlier. If this is an Alternate Hire, make the appropriate change to the Job Code.

***Job Code Level** – The level is part of the 4-character Job Code for classified employees and it must be reviewed each time the position number is changed on a classified position.

Supervisor Level – This field, indicating whether an employee is a supervisor, is optional. There is reporting capability for this field.

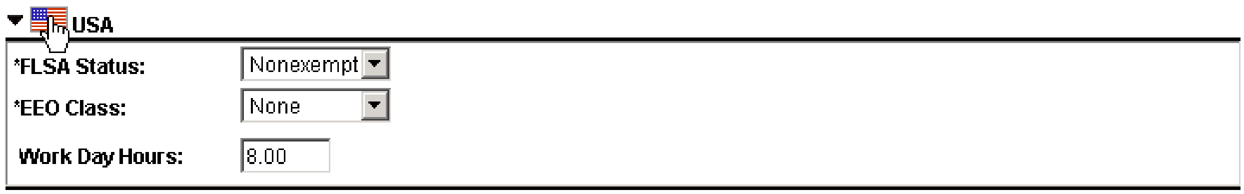
***Regular / Temporary** – Defaults from the position number selected earlier and it must be reviewed each time the Position Number is changed.

Empl Class – **Select** one from the dropdown menu.

- PClass/TP – Permanent Classified/Trial Period
- Perm Class – Permanent Classified
- Prob Class – Probationary Classified
- Unclassified

not applicable to Certificate hires

Click the dropdown arrow next to the USA flag.



***FLSA Status** – Verify Value
The default is nonexempt. Please review the Oklahoma Policy Guidelines for FLSA as a reference tool when starting the FLSA review (located at http://www.ok.gov/opm/documents/2004FLSAGuidelines.doc). **The FLSA and Pay Group need to be synchronized.**

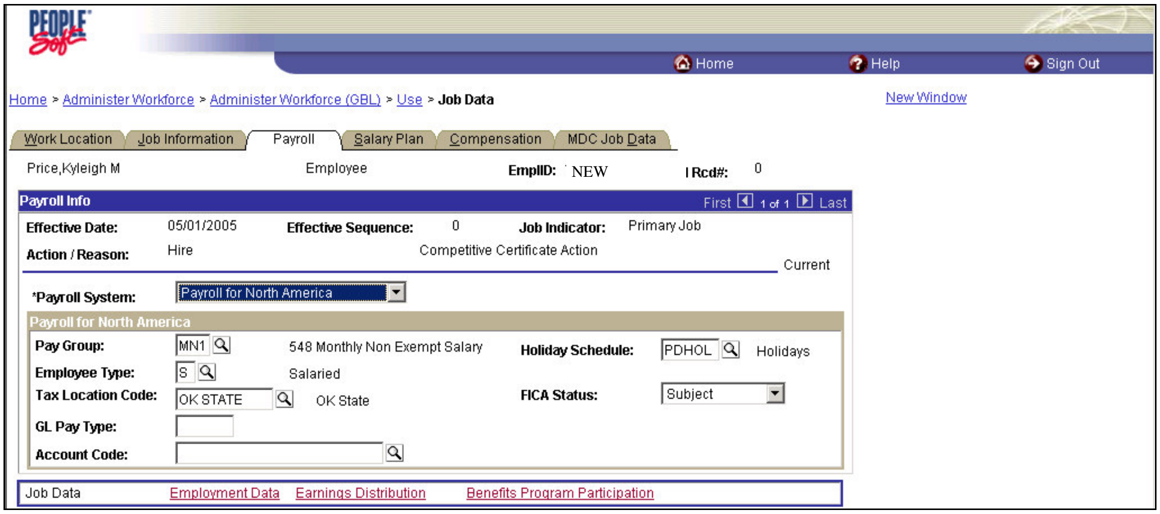
***EEO Class** – Defaults to ‘None’.

Work Day Hours – **Enter** the appropriate value. Full Time, Regular = 8 hours.

NOTE: Default values are automatically populated for the following fields: Regular / Temporary, Full / Part, Officer Code, Regular Shift, Standard Hours, Work Period, FLSA Status and EEO Class.

PAYROLL PAGE

Click the ‘Payroll’ Tab.



Enter information in the following fields:

***Payroll System** – Defaults to ‘Payroll for North America’.

Pay Group – **Enter** the appropriate ‘Pay Group’ for your agency. Use the Lookup (magnifying glass), if necessary, to find the available values. Ensure the Pay Group matches the type of FLSA status for the position (i.e., MN1 {Monthly Non-exempt} or ME1 {Monthly Exempt}).

IMPORTANT NOTE ABOUT PAY GROUP CHANGES:

Pay Group changes **MUST** be made at the start of a pay period (whether monthly or biweekly), if they are going from a Main payroll to a Supplemental payroll or vice-versa.

Holiday Schedule – Defaults from ‘Pay Group’. Must be reviewed when changing pay groups.

Employee Type – Defaults from ‘Pay Group’. Must be reviewed when changing pay groups.

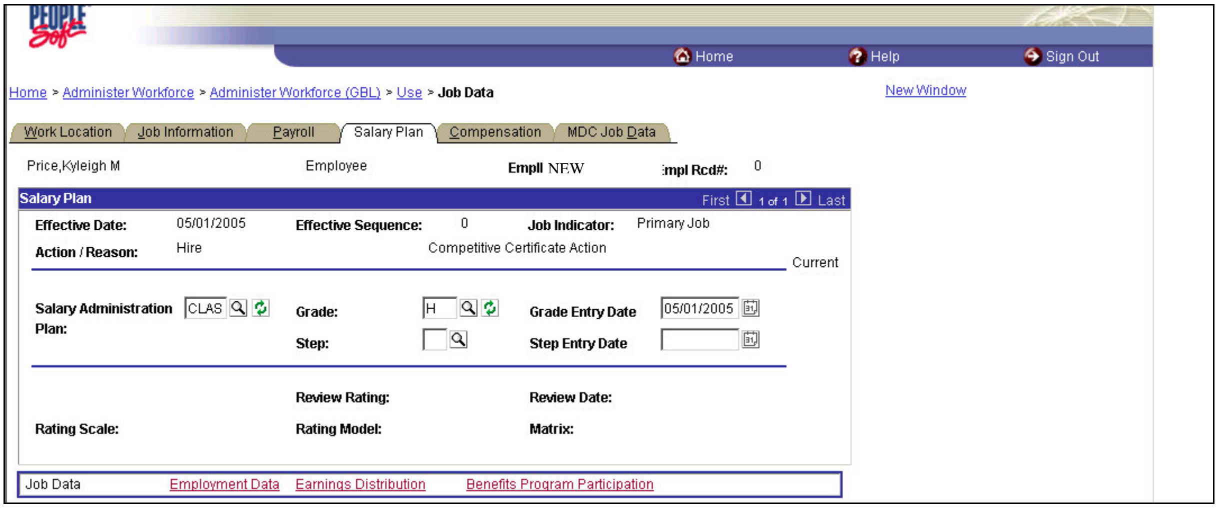
***Tipped** – Defaults to ‘Not Tipped’, change only when applicable.

Tax Location Code – **Select** “OK STATE” from Lookup.

FICA Status – Defaults to ‘Subject’, change only when applicable.

Salary Plan Page

Click the 'Salary Plan' Tab.

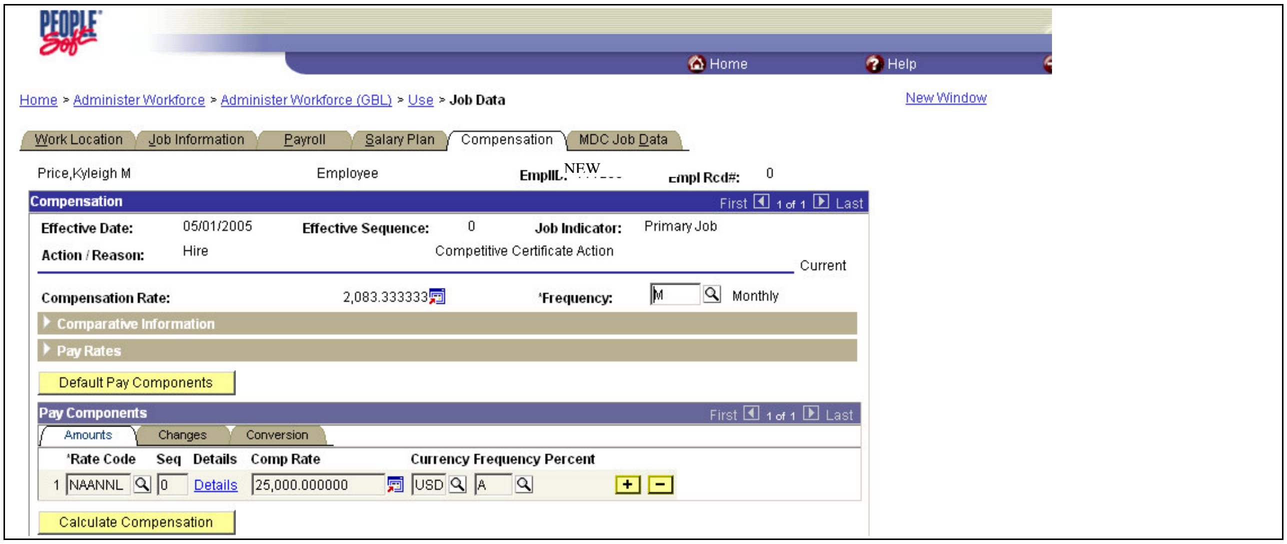


NOTE: Information in the fields on this page defaults from the Job Code.

Field Explanations	
State System	**PeopleSoft System**
Salary Schedule	Salary Administration Plan
Pay Band	Grade
Step	Step

COMPENSATION PAGE

Click the ‘Compensation’ Tab.



Employees on a Salary Step: (No manual entries required)

Click Default Pay Components **to execute Pay Component defaults.**

NOTE: You must select the Default Pay Components **button under the following conditions in order for the Default Pay Components to be executed:**

Changes to job code, position number, location and/or Department fields.

Compensation Rate (Display only)

***Frequency –** (Indicates the frequency the employee will be paid). **Enter** the appropriate value:

- M – Employees paid Monthly
- B – Employees paid Bi-weekly

Pay Components

***Rate Code** – **Select** the appropriate value from the Lookup and tab:

- NAANNL – Salaried Employees (paid either Monthly or Bi-weekly)
- NAHRLY – Hourly employees

Comp Rate – **Enter** the appropriate dollar value, either the Annual Salary or Hourly Rate.

Frequency – (Indicates the frequency of the salary). The Frequency will default from the Rate Code selected (NAANNL = A; NAHRLY = H)

Currency – ‘USD’ (US Dollar) auto-populates when the Rate Code is selected from the Lookup.

Changes Tab: This tab will show you the amount in dollars how much the salary changed on the last salary adjustment action and it will show you the percentage of change. If you want to change the salary by a percentage or amount you can put it on the change tab and calculate compensation.

Conversion Tab: This tab will show you the annual or hourly amount as a monthly or bi-weekly salary, and will split compensation amounts if more than one Rate Code is entered (e.g., NAANNL and a Training Pay or Shift Pay).

For All Employees

Click Calculate Compensation. The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates.

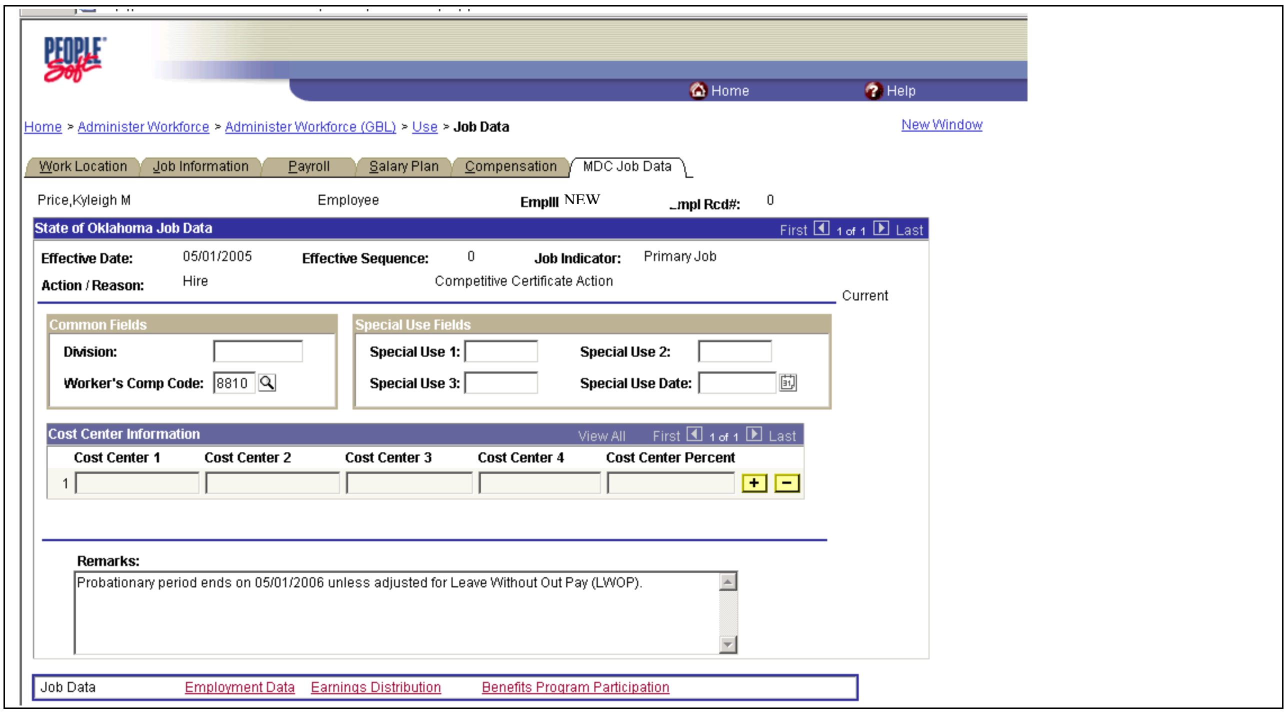
Click the Pay Rates dropdown arrow to view the calculations.

Pay Rates					
Daily	92.307692	USD	**Monthly**	2,000.000000	USD
Weekly	461.538462	USD	**Annual**	24,000.000000	USD

NOTE: You can click Calculate Compensation **to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values. However, you cannot modify the employee's pay components without recalculating the compensation.**

MDC JOB DATA PAGE – (OPTIONAL PER AGENCY)

NOTE: The MDC Job Data page is a custom page developed for various uses by different agencies. This is not a required page; however, various Agencies may choose to **enter** information as described.



Division – Replaces the Division field from the legacy system. **Enter** if applicable.

Worker's Comp Code – **Enter** the WCC number for reporting and billing purposes, if applicable.

Special Use – Free form fields an Agency can use to **enter** information of its choice. Suggested uses:

- Number of months, days and years the longevity date needs to be backed up for prior service.
- Date the system needs to be backed up to after a break in service for longevity.
- Department numbers meaningful to a specific agency.
- Agency employee ID numbers.
- Agency with other information that is currently needed or used.

Cost Center Information – The Cost Center Percent field must equal 100% or 0% if not used. For each employee level row of data, multiple Cost Center rows can be entered. If there are multiple Cost Center rows, the combined total of each Cost Center Percent field must be equal to 100%.

Remarks – Free text that will be printed on the OPM-14. PROVIDE THE AMOUNT OF SHIFT DIFFERENTIAL PAY IN REMARKS.

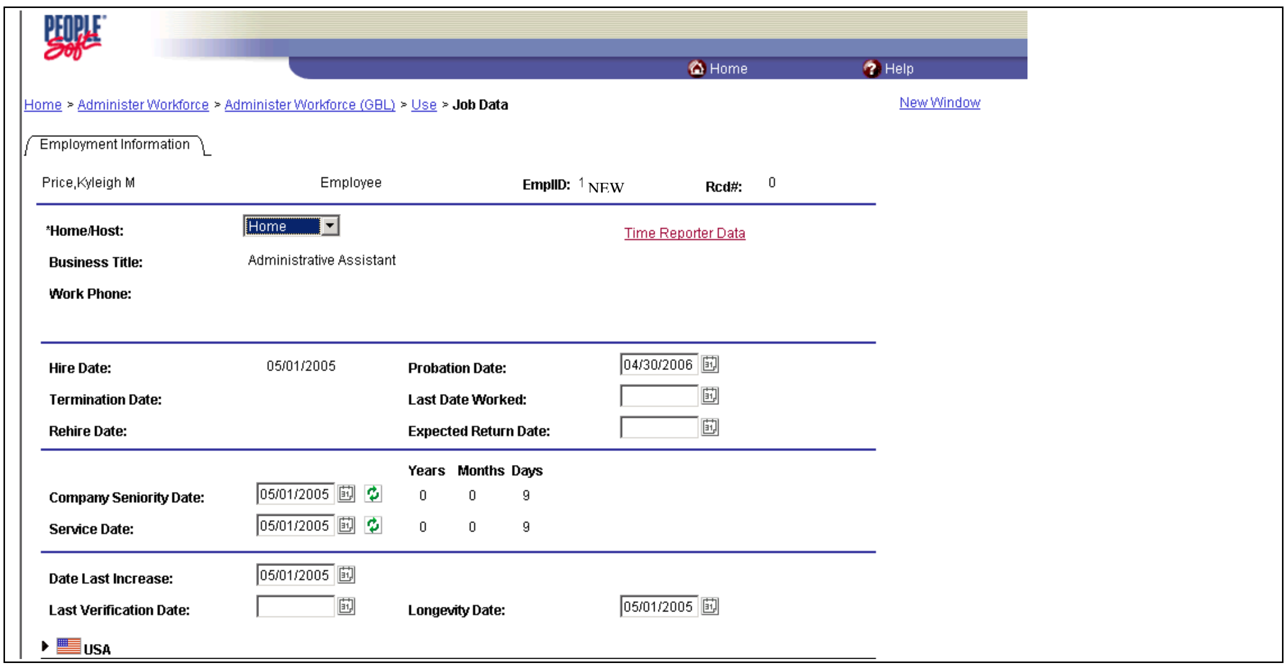
STEP IV – ENTERING OTHER JOB DATA

EMPLOYMENT DATA PAGE

Select the link from the bottom of the page.

The Employment Information Page will be displayed: The Employment Data page is open to agency users and DOES NOT require a Help Desk to change or correct.

EMPLOYMENT INFORMATION PAGE



Probation Date – **Enter** the Probation date. The OPM standard for this date is the last date of the employee's probationary status. (Classified Jobs)

Longevity Date – **Enter** the Longevity Date for all employees eligible to receive Longevity Pay. For a new hire, this will be the Hire Date. Please refer to the Longevity Pay Program Guide, which can be accessed on the Office of Personnel Management Website at www.opm.ok.gov under *HR and Employee Services.*

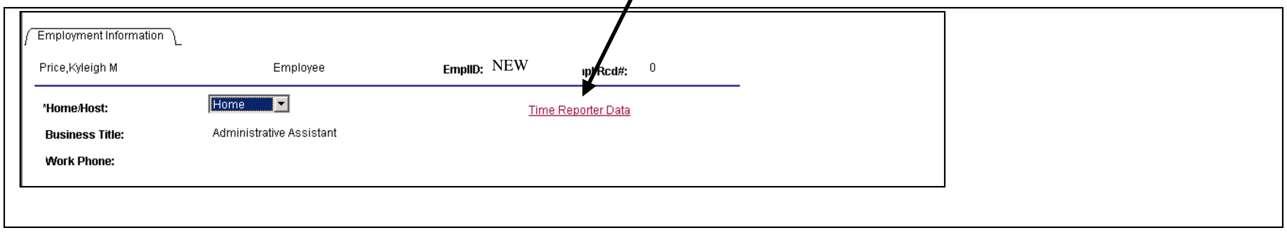
Company Seniority Date – The date of hire for the employee's first time in PeopleSoft. This date is used as the date the employee joined your agency.

****Service Date – Enter** date of hire. ***Required by the State of Oklahoma.*** This date is used to determine your annual leave accrual level.

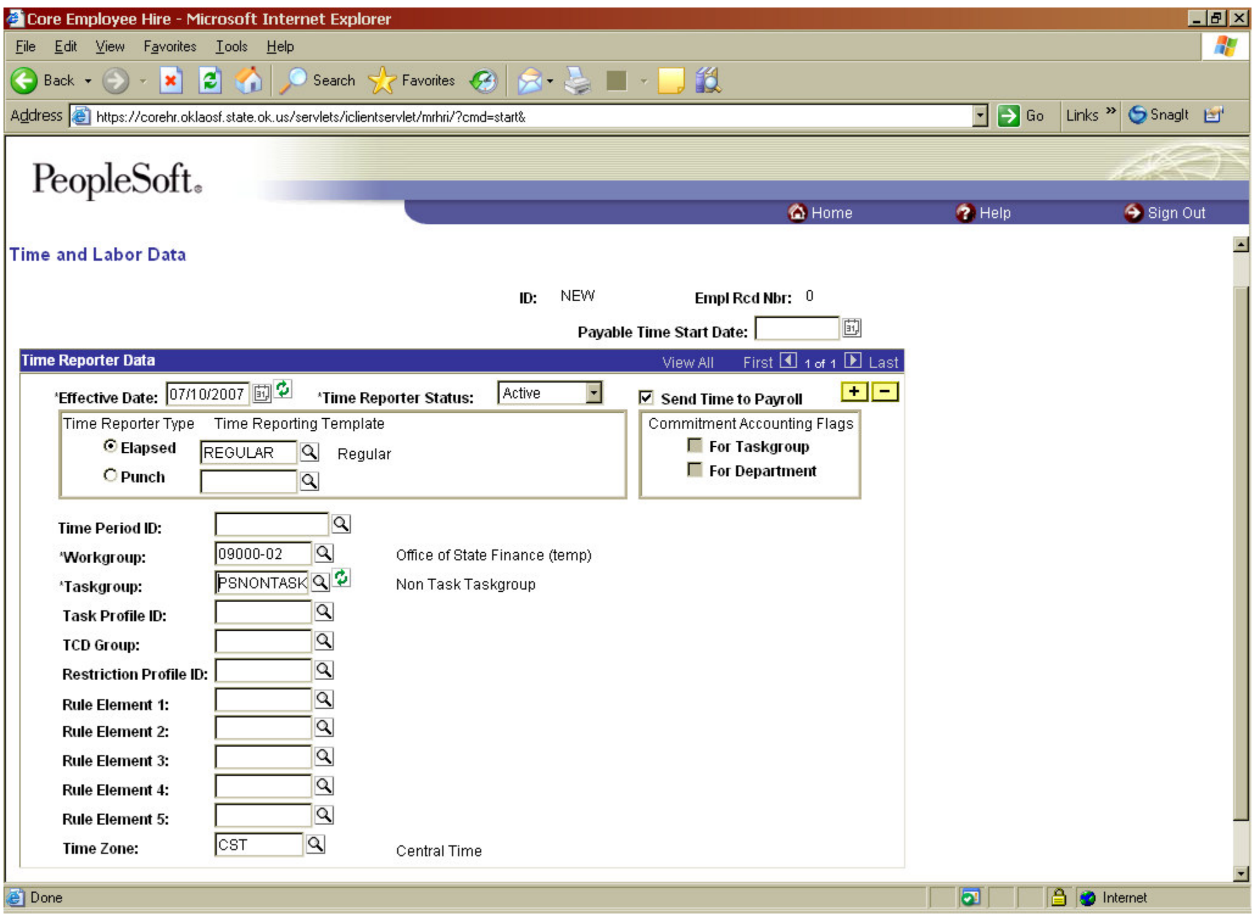
NOTE: The system will automatically set the Company Seniority Date and the Service Date to the effective date that was entered on the 'Work Location' page on a new hire.

TIME REPORTER DATA

From the Employment Data Page **select** the Time Reporter Data link. DO NOT MAKE THE TIME REPORTER DATA INACTIVE – EVER.



Time and Labor Data – Time Reporter Data



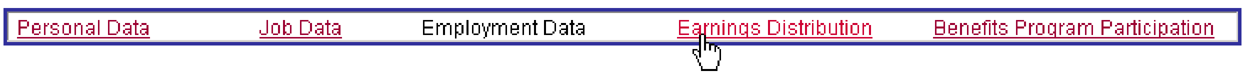
Enter the following information:

Effective Date – Date you want to start entering time for. This will usually be the hire date.
Time Reporter Status – Active
Send Time to Payroll – Checked
Time Reporter Type – Elapsed
Time Reporting Template – REGULAR
Workgroup – Agency Number + 00 + -01 for Salary or -02 for Hourly (e.g., 54800-01)
Taskgroup – PSNONTASK
Time Zone – CST

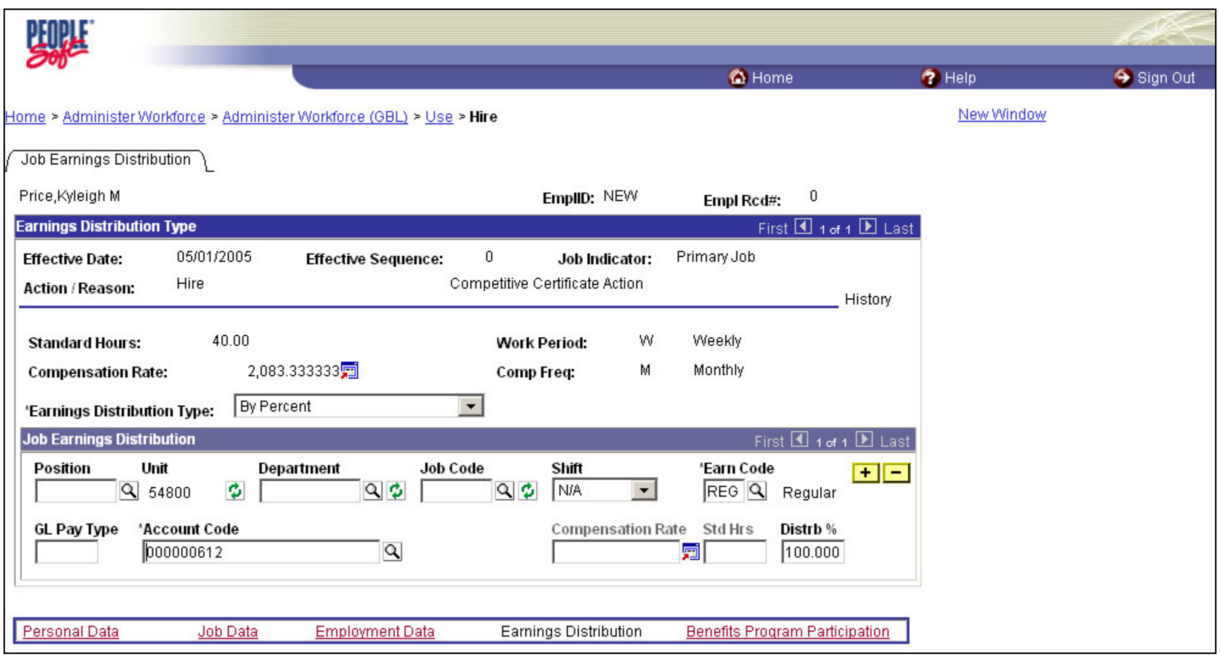
Click OK – After warning message, **click** the OK button again.

Earnings Distribution Page

Select the link from the bottom of the page.



JOB EARNINGS DISTRIBUTION PAGE



***Earnings Distribution Type** – **Select** 'By Percent'.

Unit – Will auto-populate

Earn Code: will auto-populate from the Pay Group entered on the Payroll Tab of Job Data

- **REG –** Salaried employees
- **HRG** – Hourly employees
- **LRG –** Legislative employees (Agencies 421 and 422)

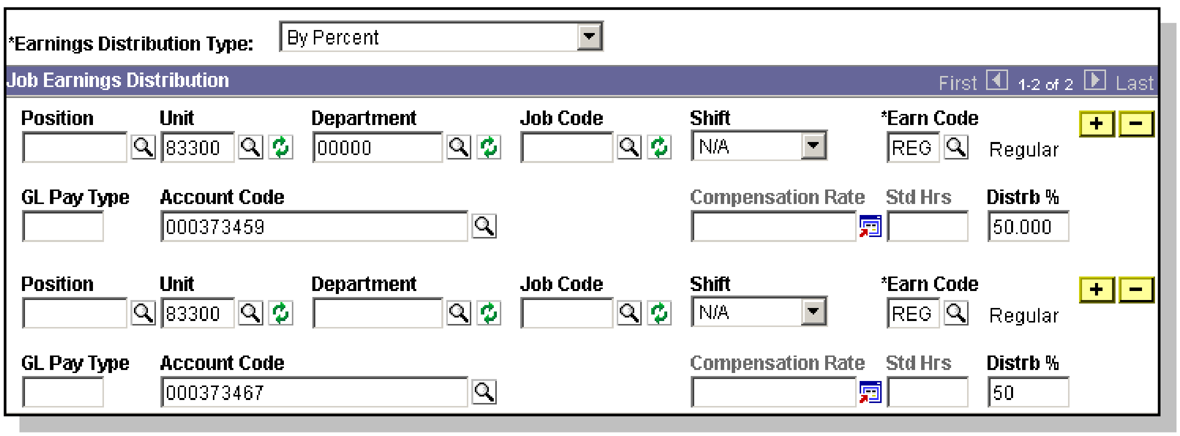
Account Code – Enter the associated Account Code.

Distrb% - **Enter** the percentage allocated to the selected Account Code.

In the example listed below only 50% was allocated to Account Code 000373459.

To allocate the remaining percentage to another Account Code, **select**  and a new Job Earnings Distribution row will become available. **Enter** the next Account Code and Distrb% values.

NOTE: If funds are allocated to only one account, simply enter the Account Code information and enter 100 for the Distrb%.



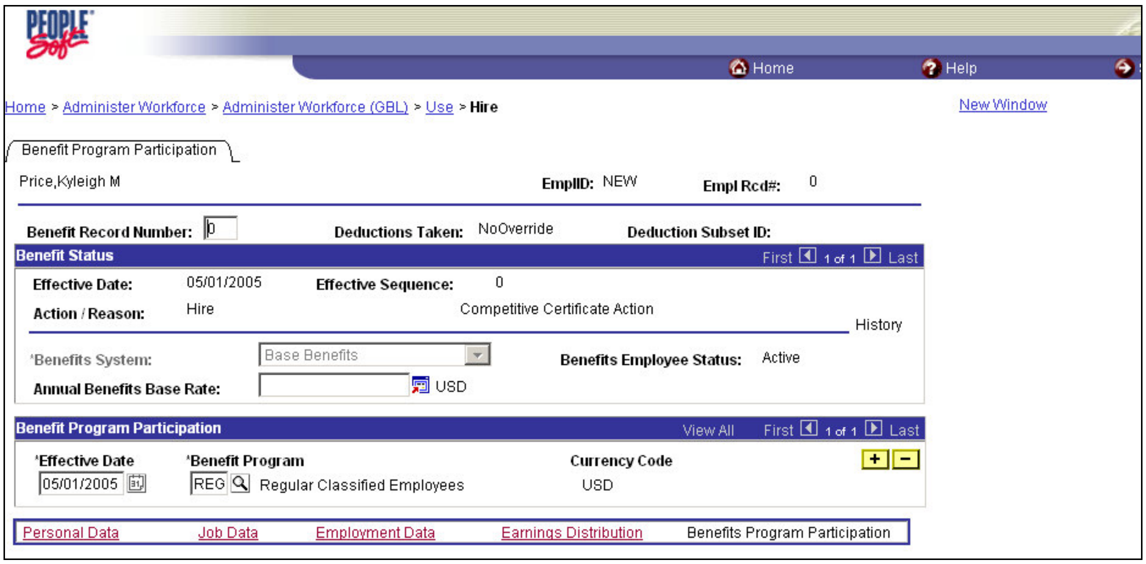
NOTE: The total Distrb% percent must equal 100%.

DO NOT enter a Position Number or Job Code value; only use Department, Earn Code (which defaults from Pay Group), and Account Code and Distrb% fields.

BENEFITS PROGRAM PARTICIPATION PAGE

Select the link from the bottom of the page.

The Benefit Program Participation page will be displayed:



Benefit Record Number – The value in this field must always match the 'Empl Rcd#'. VERY IMPORTANT – MUST MATCH.

***Benefit Systems –** Defaults to 'Base Benefits'

Enter information in the following fields:

***Effective Date – Enter** the date benefits will become effective - defaults to HIRE effective date from Work Location page. Benefits include leave and in the Hire process the Effective Date will be the Hire date.

***Benefit Program** – Defaults from the Pay Group. If an employee is not eligible for Benefits of any kind, the default will be 'NBP' for No Benefit Program. The NBP Program includes the RET for retirement in the Deduction Set.

NOTE: Agency benefit numbers are used on concurrent (second) job records only.

Congratulations – you are now ready to SAVE your new employee information.

Click 

at the bottom of the page.

After you have SAVED you will notice the following:

1. While the system is saving your information the word ***PROCESSING*** will appear in the upper right-hand corner of the page.

2. After the system has completed saving all your information the word ***SAVED*** will briefly appear in upper right-hand corner of the page.

3. The Employee Title Bar will display the newly assigned Employee Number. In the example below, the new employee number is 111610.

NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

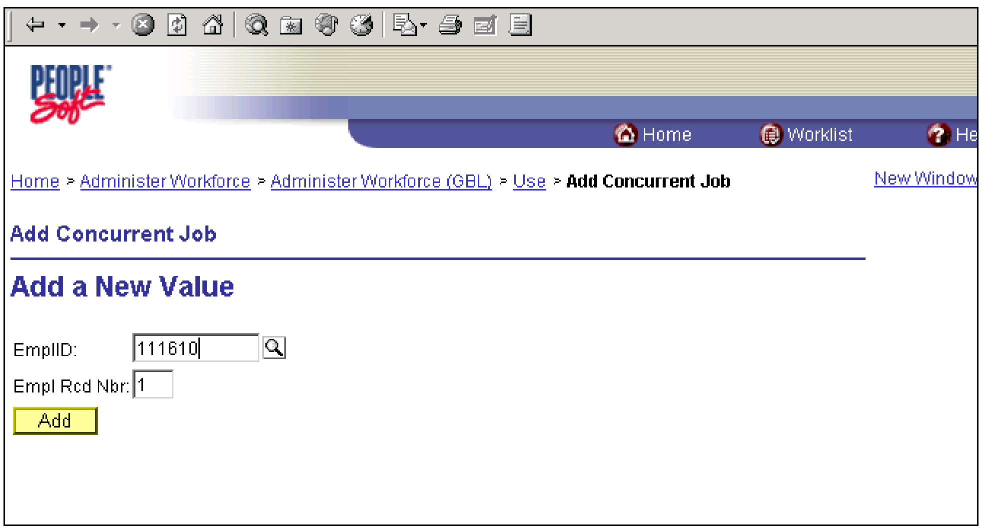
ADD A CONCURRENT JOB

Employees will sometimes be employed at two State agencies at once. In this case, the second agency will need to 'Add a Concurrent Job' and NOT another Hire or Rehire action. Some agencies routinely assign one employee to more than one Job Code. These agencies will use Concurrent Job to manage those multiple assignments.

NOTE: Refer to the 'Hiring an Employee' section for available Actions / Reasons.

STEP I – NAVIGATE TO THE CONCURRENT JOB COMPONENT

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Add Concurrent Job*
The system will display the following:



EmplID – **Enter** the employee number of the record to which you will be adding a concurrent (multiple) job. If you do not know the employee number, **select** the Lookup button to search on the employee's name.

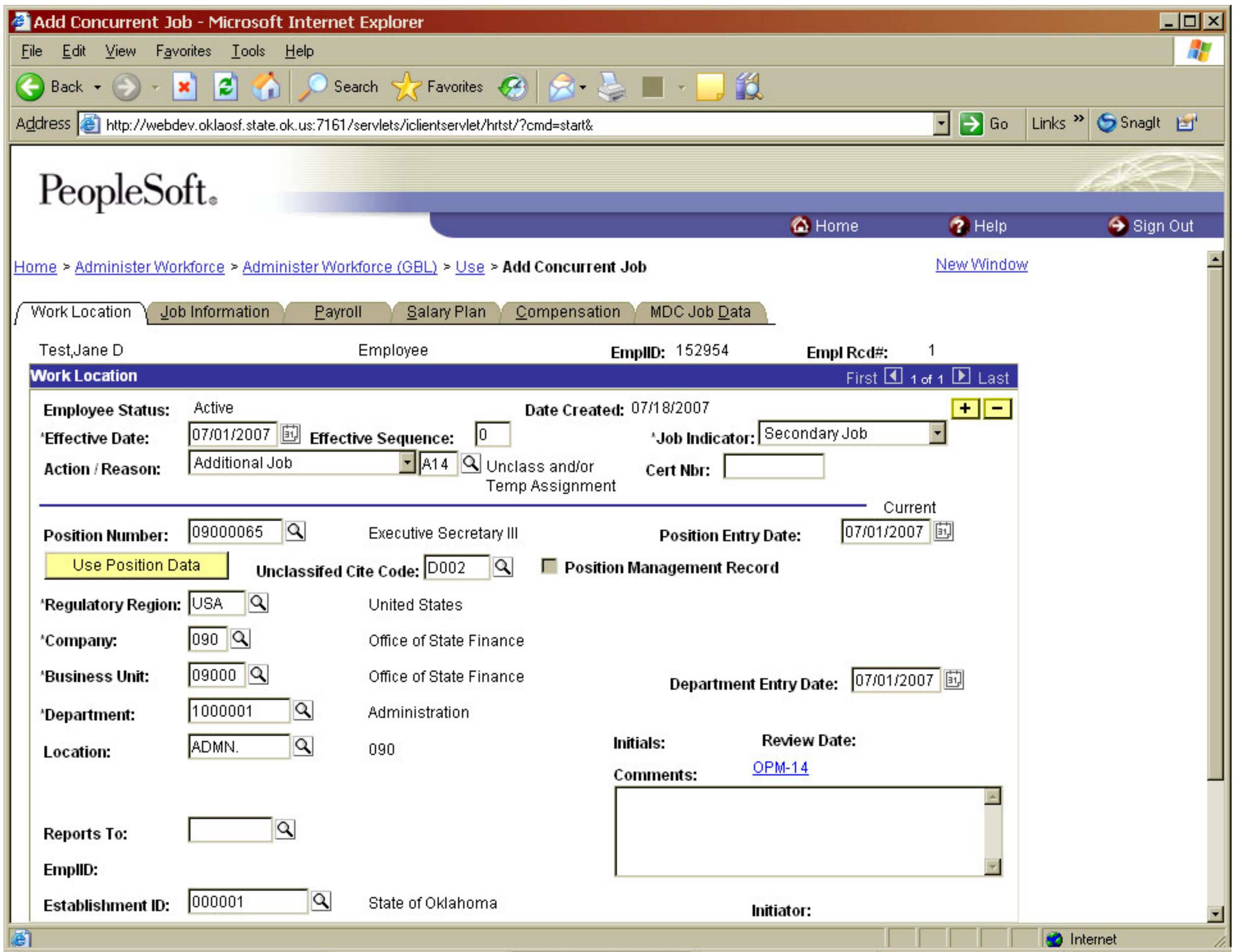
Empl Rcd Nbr –**DO NOT ENTER A NUMBER:** The system uses employment record numbers to track data separately for each concurrent job. Each job must have a unique employment record number. The **default** number is the highest existing employment record number for that employee, plus 1. For example, if the employee's highest existing employment record number is '0', the system assigns '1' as the new job employment record. Follow the chart below for Empl Rcd Nbr instructions.

Job	Empl Rcd Nbr
1	‘0’
2	‘1’
3	‘2’

Click Add to continue.

The system will display the Job Data component pages. Notice that these pages are the same pages that you used during the hire process.

STEP II – ENTER JOB DATA INFORMATION



*__Action__ – Change the Action to 'Additional Job'. (**DO NOT USE HIRE OR REHIRE)**

*__Reason__ – **Select** the appropriate Reason. This list contains the same Reasons that are available for 'Hire', plus additional Reasons needed for other transactions.

Empl Rcd# – The system automatically updated the Empl Rcd# to **'1'**.

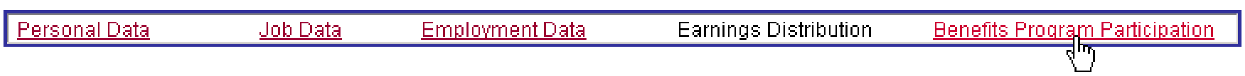
Job Indicator – The system automatically updated the Job Indicator to **'Secondary Job'**. This employee already has a Primary Job with an Empl Rcd# of '0'. If the Concurrent Job (Empl Rcd #1) is now the 'Primary Job', then change the Job Indicator to 'Primary Job'. The Job Indicator on Empl Rcd # '0' will then need to be updated to 'Secondary Job'.

For the remainder of the **Work Location** page, and the **Job Information, Payroll, Salary Plan,** and **Compensation** pages follow the instructions given in the 'Hire' process.

Click the **Earnings Distribution** link and follow the same instructions that are listed in the Hire process.

Click the **Employment Data** link and then the Time Reporter link. Follow the same instructions that are listed in the 'Hire' process.

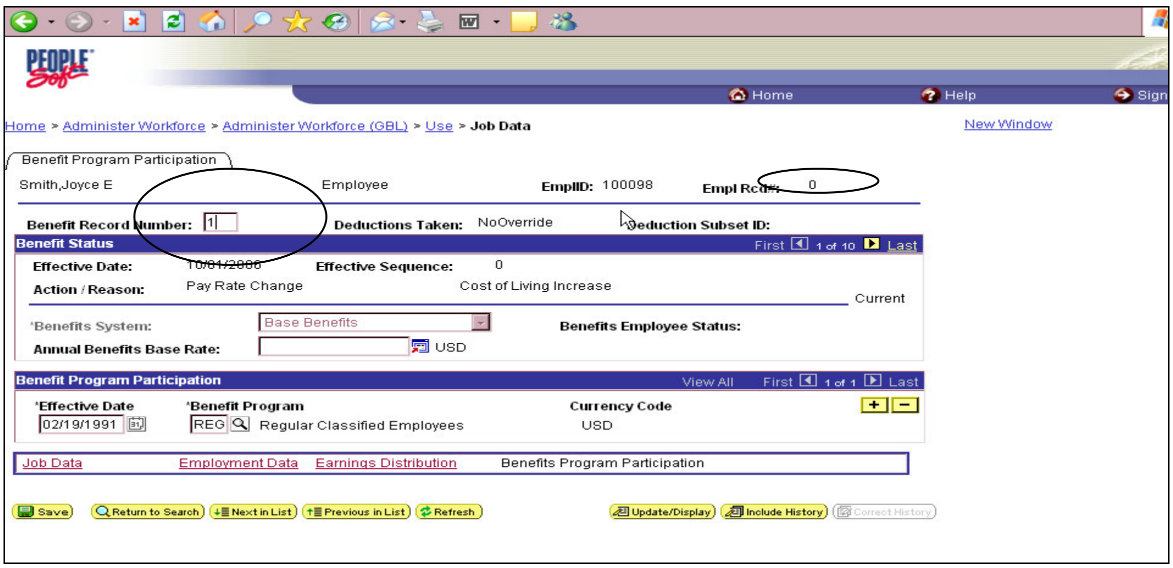
Click the **Benefit Program Participation** link to continue.



STEP III – ENTERING BENEFITS INFORMATION

In addition to an employment record number, each concurrent job will be assigned a benefit record number that tracks the employee's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

See screenshot below to review an example of a mismatched record between Empl Record and Benefit Record.



Refer to the table below to assign benefit record numbers in a situation where an employee has three concurrent jobs. **THE EMPLOYEE RECORD AND BENEFIT RECORD MUST MATCH FOR PAYROLL TO RUN CORRECTLY.**

Description	EmplID	Job	Empl Rcd No.	Benefit Rcd No.
Job One	000001002	1	0	0
Job Two		2	1	1
Job Three		3	2	2

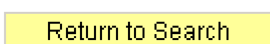
NOTE: The Benefit Program will be either REG - Regular, the specific agency number (if benefits are in more than one job), or NBP – No Benefit Program depending on the employee's eligibility.

Congratulations – you are now ready to SAVE your information.

Select 

at the bottom of the page.

NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

Now, click 

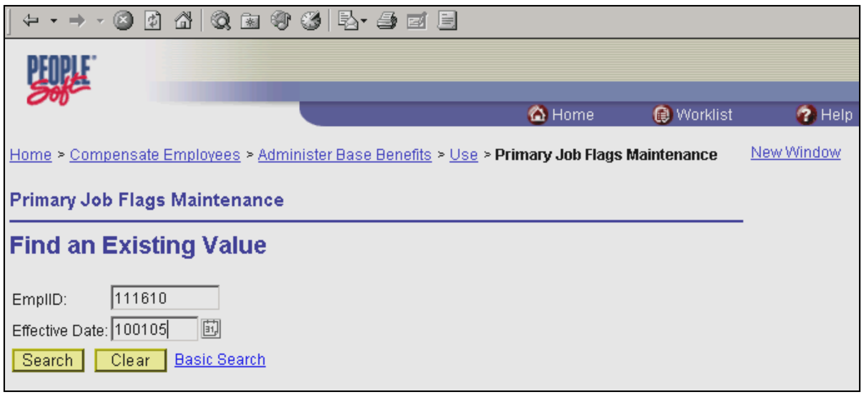
at the bottom of the page. Then go back into the record you just created as a Concurrent Job for the employee and click the Employee Data link at the bottom of the Work Location page. The Company Seniority Date and Service Date fields are now available for updating—the system DOES NOT default these values when creating an Additional Job.

Remember: Service Date is a MUST ENTER field for payroll to process successfully.

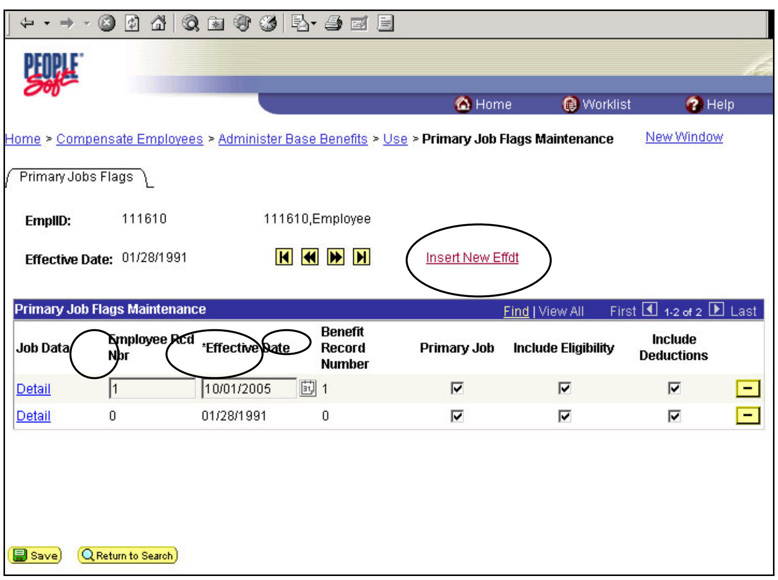
STEP IV – UPDATE PRIMARY JOB FLAGS MAINTENANCE

Navigation: *Home >Compensate Employees > Administer Base Benefits > Use > Primary Job Flags* Maintenance

The system will display the following search window:



Enter the Employee Identification Number (Empl ID) and **click** Search.



Click on the **'Insert New Effdt'** hyper link.

Employee Rcd Nbr – Change the 'Employee Rcd Nbr' field to the new concurrent Job Record Number (usually number '1').

Effective Date – Update with the Concurrent Job effective date.

Benefit Record Number – Change to match the 'Employee Rcd Nbr' field.

Primary Job Indicator – **Click** to populate with a check mark.

Click 

at the bottom of the page to save your changes.

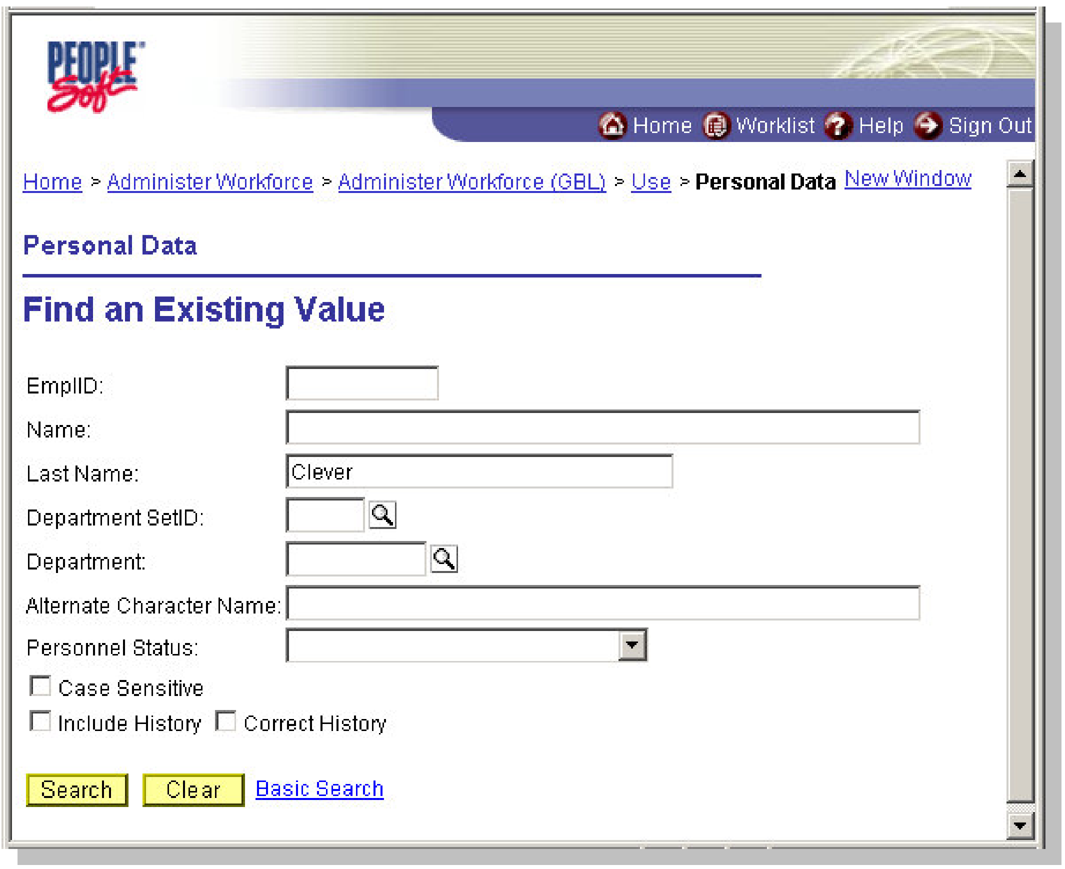
NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

PERSONAL DATA CHANGES

Navigate to the Personal Data Component.

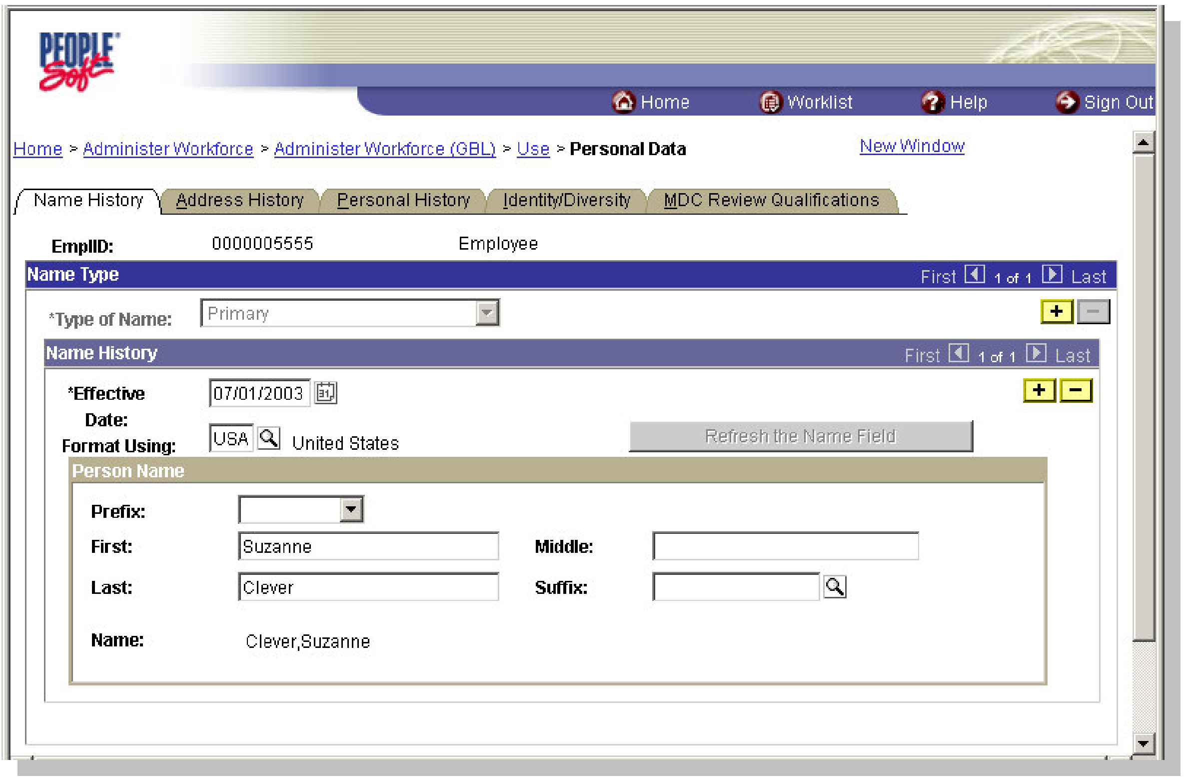
Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Personal Data*

The system will display the following search window:



Search for the employee record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **select** Search . Last Name is shown above. The employee's Personal Data pages will be displayed.

PERSONAL DATA - NAME CHANGE



NOTE: The employee's current row of information will be displayed.

Name Change Scenario: *Employee 'Suzanne Clever' got married on June 12, 2007 and changed her name to Jones. She notifies HR on July 9th and show her new Social Security Card.*

STEP I – INSERT A NEW ROW

Suzanne Clever's primary name is going to change to Jones. **Click** + located under the Name History bar.

The system will make a copy of the existing record and allow changes to be entered into the copy.

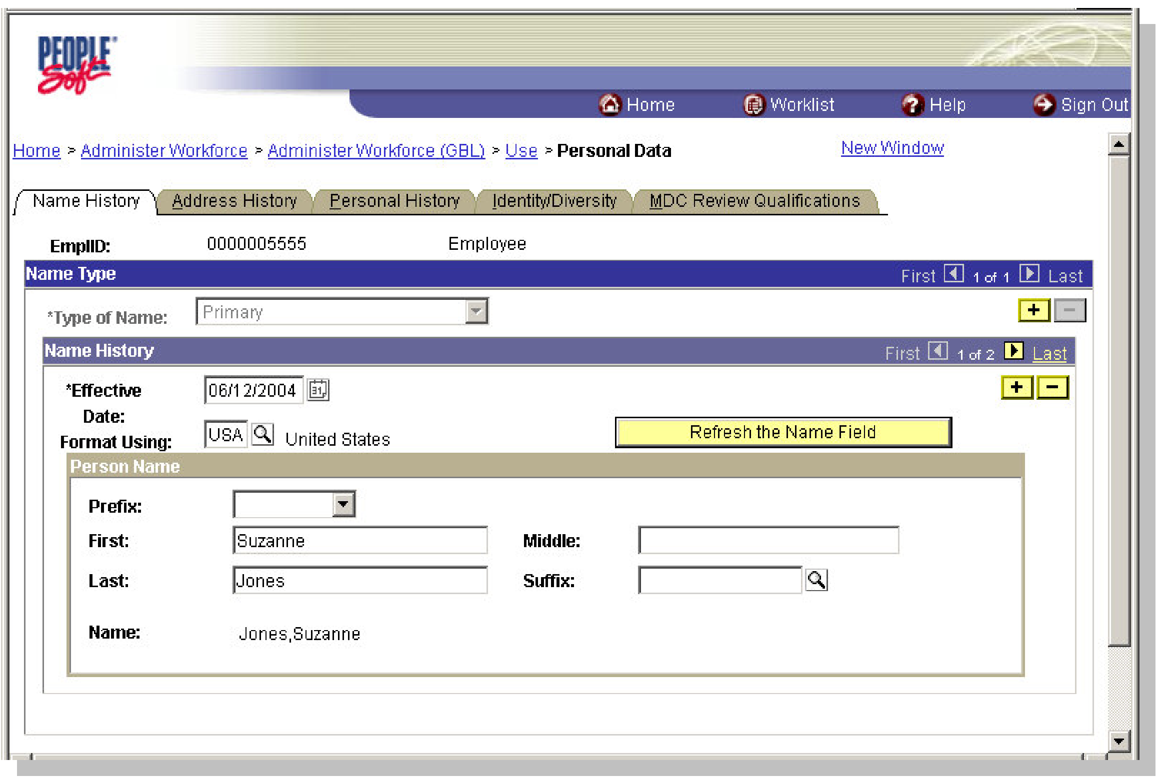
The menu bar will indicate there are 2 records (1 of 2). Changes will be entered in the current record (1). The historical record (2) is the original record.

STEP II – ENTER NEW INFORMATION

***Effective Date** – **Enter** the date that your new information will become effective in the system. This should be the beginning of the current payroll period. In this example, July 1, 2004, will be entered.

Next, **enter** Suzanne's new last name and **select** Refresh the Name Field .

Note that the Name line changed to Jones, Suzanne.



STEP III – MARITAL STATUS (IF APPLICABLE)

Select the 'Personal History' Tab and **click** [+] .

Change the following information:

***Effective Date** – **Enter** the date that your new information will become effective in the system. This should be the beginning of the current payroll period. In this example, July 1, 2004, will be entered.

***Marital Status** – Married

As of Date – **Enter** the actual date of the Marriage.

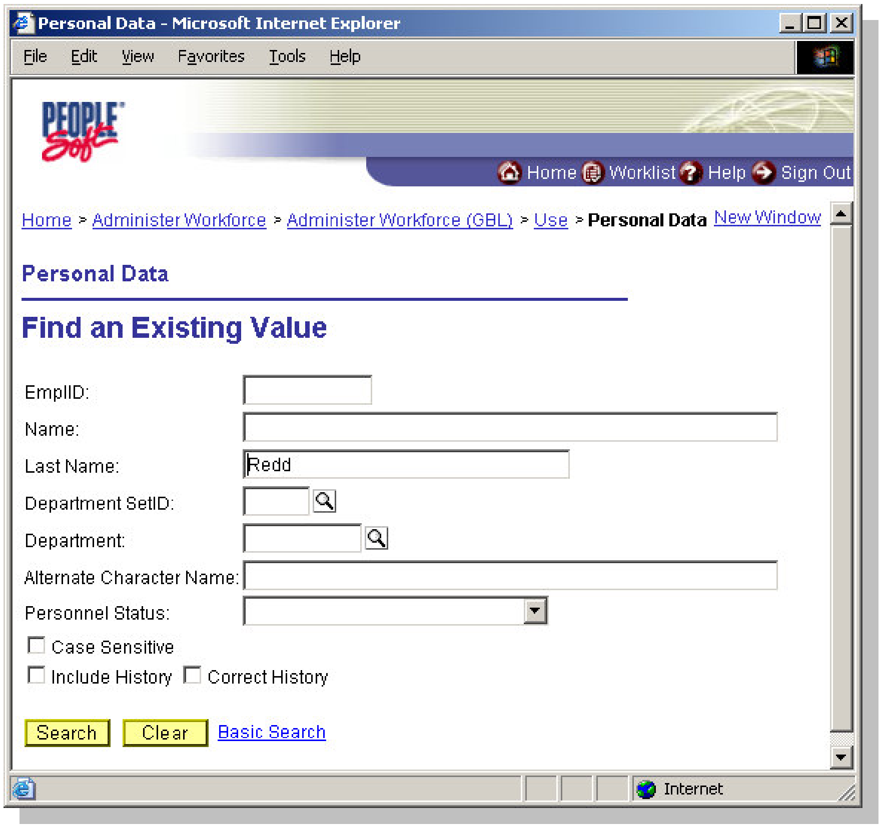
Click [Save] at the bottom of the page to save your changes.

NOTE: Use the Arrows left [◄] and right [►] to toggle between current and historical records.

PERSONAL DATA - ADDRESS CHANGE

Navigate to the Personal Data Component

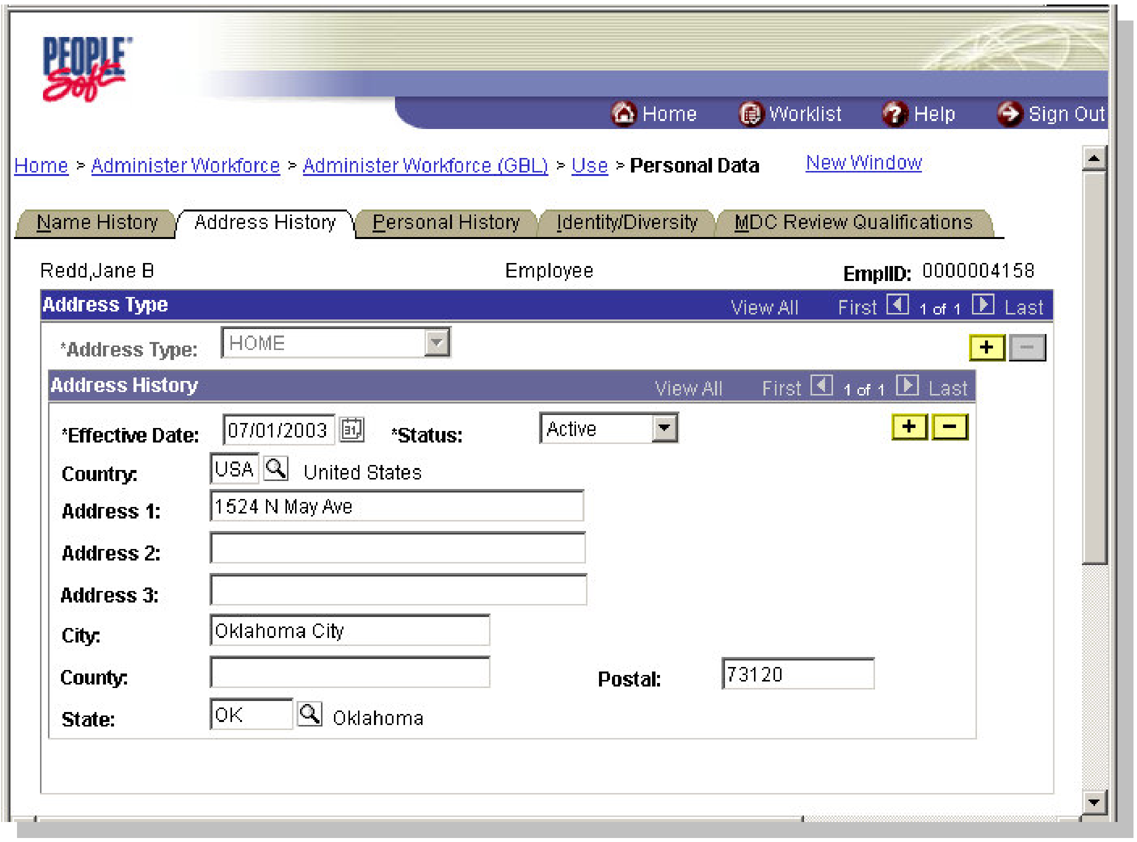
Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Personal Data*
The system will display the following search window:



Search for the employee record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **select** Search. Last Name is shown above. The employee's Personal Data pages will be displayed.

ADDRESS HISTORY PAGE

Click the ‘Address History’ Tab.



NOTE: The employee’s current row of information will be displayed.

Address Change Scenario: *Employee 'Jane Redd' wants to keep her home address and add a mailing address.*

STEP I – INSERT A NEW ROW

Jane Redd's home address is going to stay the same. She is adding the new 'Address Type' of MAIL. **Click** + located under the 'Address Type' bar. **NOTE:** When updating an existing address, **click** + within the Address History section.

The system will make a copy of the existing record and allow changes to be entered into the copy.

The menu bar will indicate there are 2 current records (2 of 2). One record is the 'Home Address' and the other record is the new 'Mailing Address'.

STEP II – ENTER NEW INFORMATION

***Address Type** – **Select** the appropriate address type. For this scenario **select** 'Mail'.

***Effective Date** – **Enter** the date the new information will become effective – the beginning of the current payroll period.

***Status** – Defaults to 'Active'

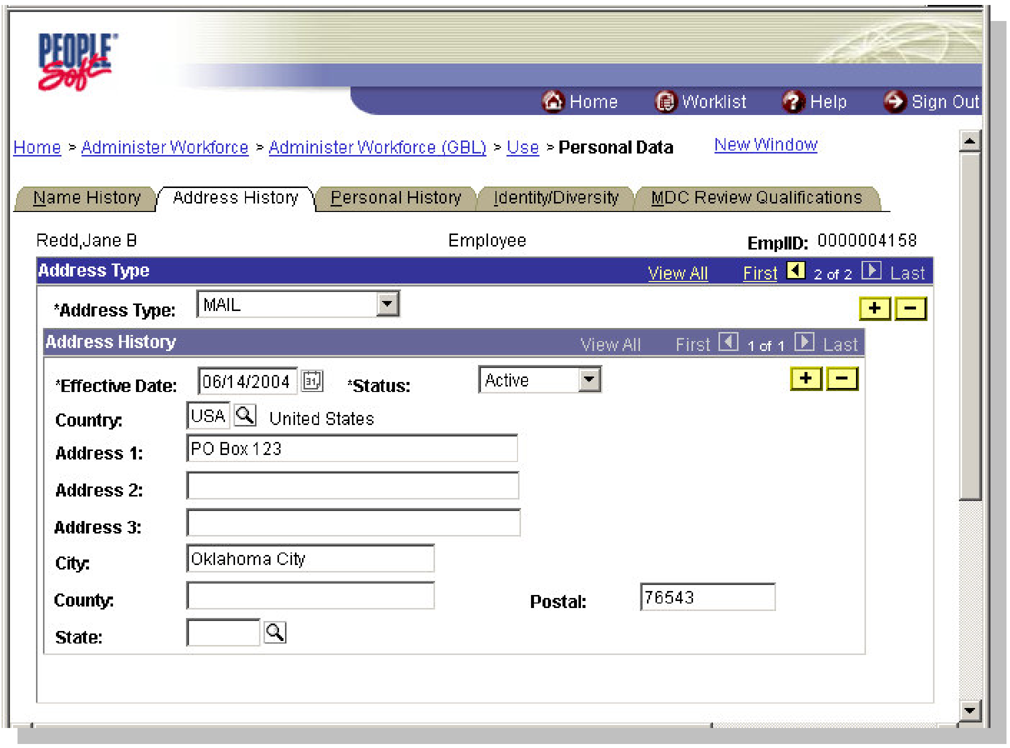
Country – **Enter** 'USA' and tab out of the field. The address fields will now become available.

County – **Enter** the numeric County ID.

Oklahoma County Number Codes

01 Adair	14 Cleveland	27 Grant	40 LeFlore	53 Nowata	66 Rogers
02 Alfalfa	15 Coal	28 Greer	41 Lincoln	54 Okfuskee	67 Seminole
03 Atoka	16 Comanche	29 Harmon	42 Logan	55 Oklahoma	68 Sequoyah
04 Beaver	17 Cotton	30 Harper	43 Love	56 Okmulgee	69 Stephens
05 Beckham	18 Craig	31 Haskell	44 McClain	57 Osage	70 Texas
06 Blaine	19 Creek	32 Hughes	45 McCurtain	58 Ottawa	71 Tillman
07 Bryan	20 Custer	33 Jackson	46 McIntosh	59 Pawnee	72 Tulsa
08 Caddo	21 Delaware	34 Jefferson	47 Major	60 Payne	73 Wagoner
09 Canadian	22 Dewey	35 Johnston	48 Marshall	61 Pittsburg	74 Washington
10 Carter	23 Ellis	36 Kay	49 Mayes	62 Pontotoc	75 Washita
11 Cherokee	24 Garfield	37 Kingfisher	50 Murray	63 Pottawatomie	76 Woods
12 Choctaw	25 Garvin	38 Kiowa	51 Muskogee	64 Pushmataha	77 Woodward
13 Cimarron	26 Grady	39 Latimer	52 Noble	65 Roger Mills	

Next, **enter** Jane's mailing address with the City, State, and Zip Code.



Select 

at the bottom of the page to save your changes.

NOTE: Use the Arrows left and right to toggle between records, or select the <u>View All</u> link to view both records at the same time

FORM 4B PROCESSING

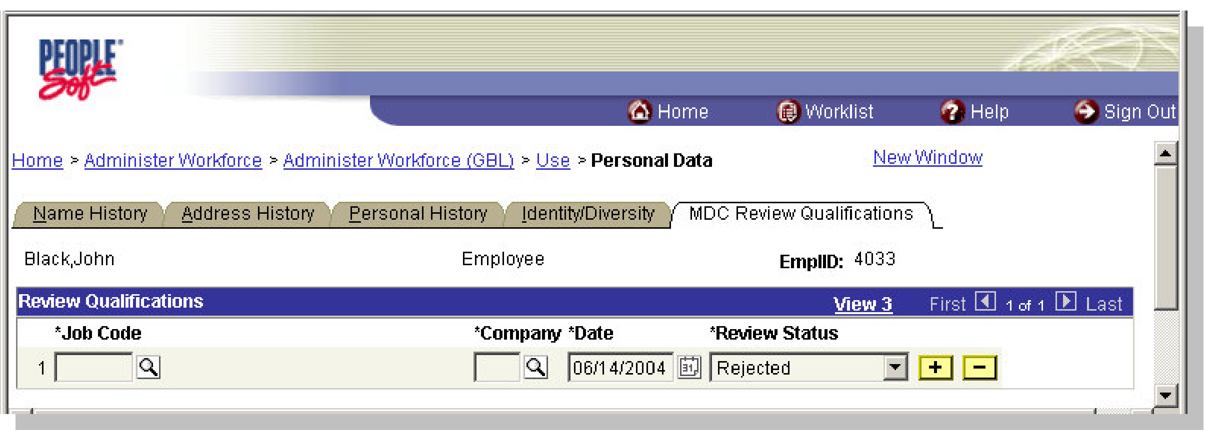
Business Process

The State of Oklahoma Merit Rule 530:10-9-10 requires certification of qualifications before promotions, demotions, transfers, and reinstatements. The MDC Review Qualifications page has been developed to meet this requirement.

Once the Office of Personnel Management has determined that an employee does or does not meet the job requirements for a Job Family / Level, OPM will indicate on the employee's record whether he is approved or rejected.

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Personal Data > MDC Review Qualifications*

Enter the Employee ID or Name in the search window and **click** the 'MDC Review Qualification' Tab.



Enter the following information:

Job Code – Enter the Job Code that was reviewed to determine qualifications.

Company – Enter the Agency number for the Agency which requested the review.

Date – Enter the date the employee OPM approved or rejected for the Job Family / Level.

Review Status – Default is 'Rejected'. OPM will **select** 'Approved' as appropriate.

To **enter** additional Qualifications Reviews, **click** + at the end of any row. PeopleSoft will sort the entries in Job Code order.

Click 

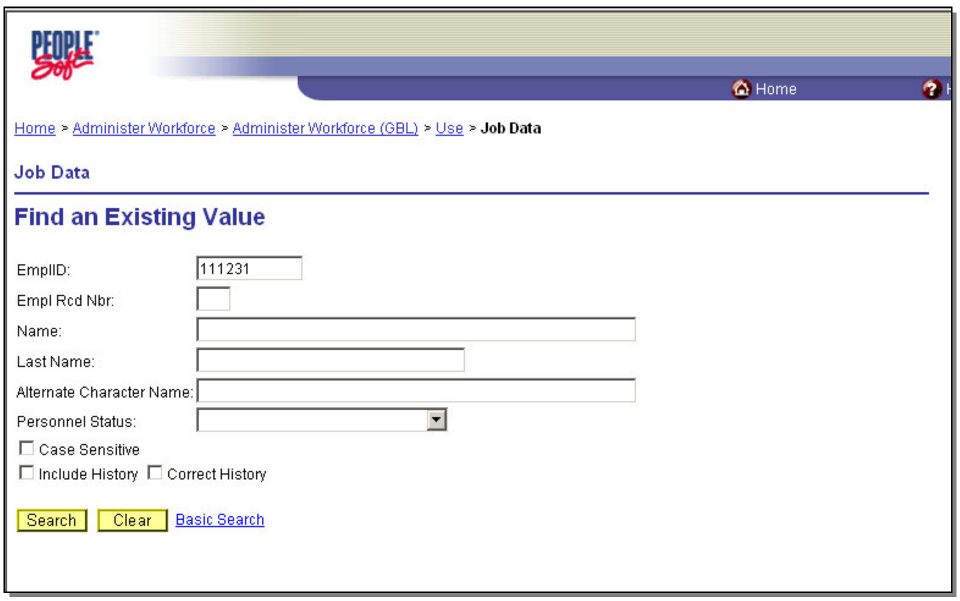
at the bottom of the page to save your changes.

JOB DATA CHANGES

JOB DATA - JOB CHANGE WITH POSITION NUMBER CHANGE

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data or Current Job*
The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above. The employee's Job Data pages will be displayed.

Job Change Scenario: *Employee 'Nicole Isaac' is changing from position 58000117-Bindery Worker to position number 58000136-Material Management Specialist, effective June 1, 2005 within the* ***SAME*** *Agency.*

NOTE: If an employee is transferring to a position in a DIFFERENT agency, follow the instructions for "Transfer an Employee to Another Agency".

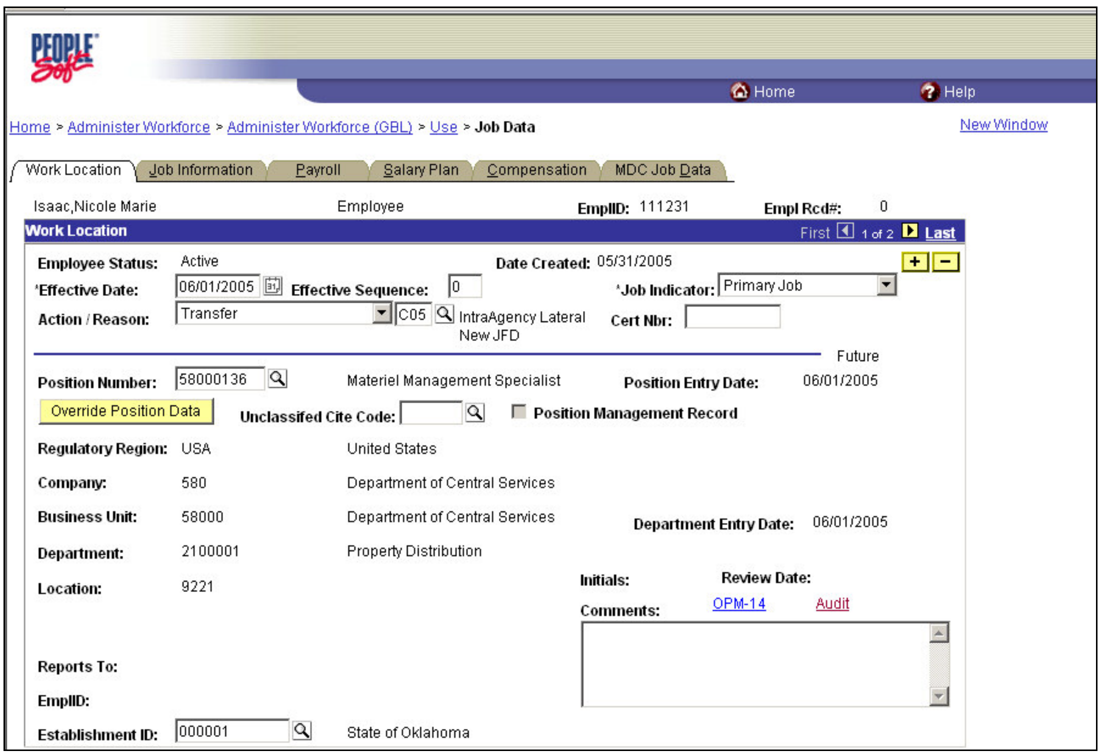
STEP I – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be **enter**ed into the new effective-dated record.

STEP II – ENTER NEW VALUES IN THE JOB DATA PAGES

WORK LOCATION PAGE



Effective Date** – ***Watch the effective date it defaults to the current date. Change the effective date field to the date the new position becomes effective.

Action – Select the appropriate value from the dropdown menu.

WITH POSITION NUMBER CHANGE	
Action	**Reason (Transaction/Code)**
Appointment Change – Same Agency	A30 Executive Fellow Conversion
	A31 State Work Incentive Program Conversion
	A40 Competitive Certificate Action
	A41 Non-Comp Certificate Action
	A42 Reinstatement
	A43 Project Indefinite
	A44 Disability Employment Program
	A45 Unclassified
	A46 Executive Fellow Conversion
	A47 State Work Inc Prog Conversion
	A48 Direct Hire-Hard to Fill
	A49 Direct Hire-Prof Licensure
	A50 Temporary to Temporary
Data Change	C90 Position Number Change Only
Demotion	C03 Voluntary Demotion
	C04 Involuntary Demotion
	C17 Demotion Due to RIF
Transfer	A07 Class to Same Class
	A10 No Previous Merit Status
	C05 Intra-Agency Lateral Transfer
	C10 Return to Previous Position
	C14 Legislative Change Unclassified to Classified
	C27 Recall from RIF Demotion
	C30 Intra-agency (sub-agency only)
	C31 Intra-Agency Same JFD & Level
	C71 Interchange Program
	C72 End Interchange Program

Reason – Select the appropriate value from the Lookup.

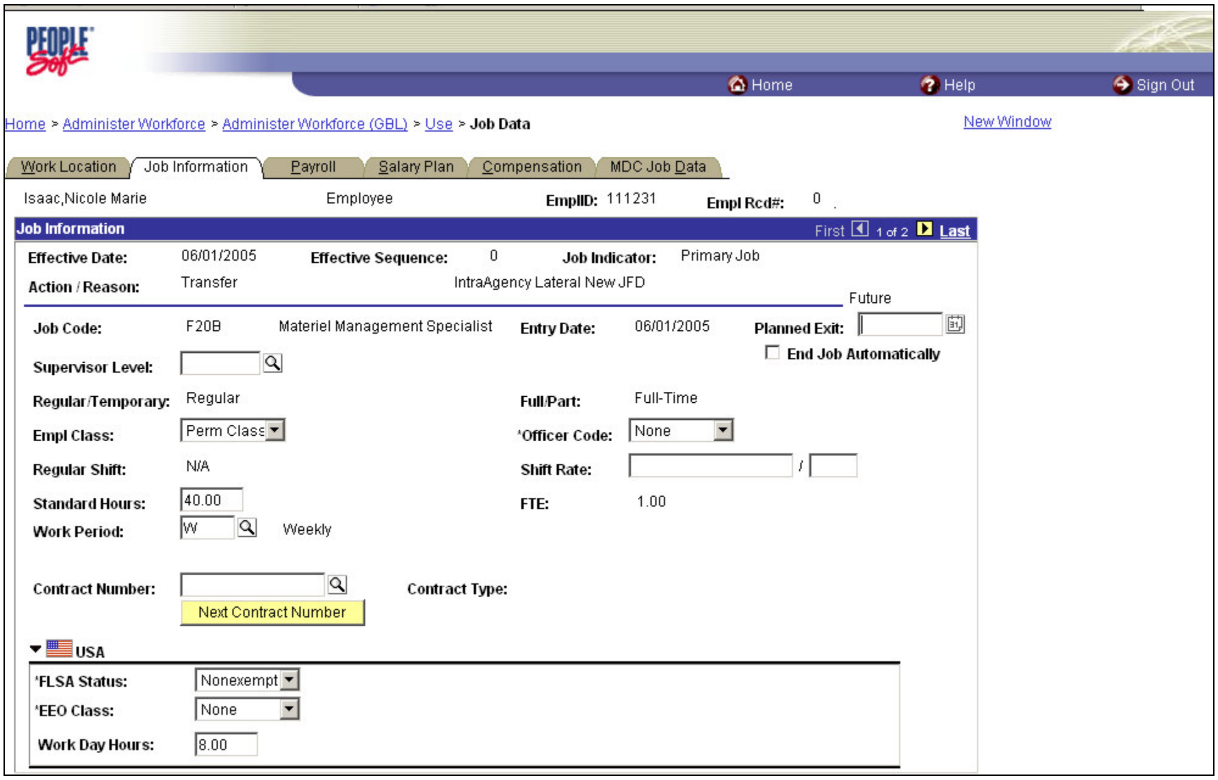
Cert Nbr – If populated, delete number

Position Number – **Enter** the new position number and tab out of the field. The associated fields will automatically update. See HIRING AN EMPLOYEE, Step III, for a comprehensive list of the fields that are automatically updated from new position information.

NOTE: When working in a new row, the Override Position Data button on the Work Location Tab will be illuminated. Clicking this button allows changes to the fields that defaulted from the position information. The button is displayed only on the Work Location page, even though some of the information that may be overridden is entered on subsequent pages.

If the button is labeled Use Position Data, this indicates that the Override function has been invoked in a previous row.
The Override Position Data function remains in effect in subsequent rows until the Use Position Data function is invoked or the position number is changed.

JOB INFORMATION PAGE



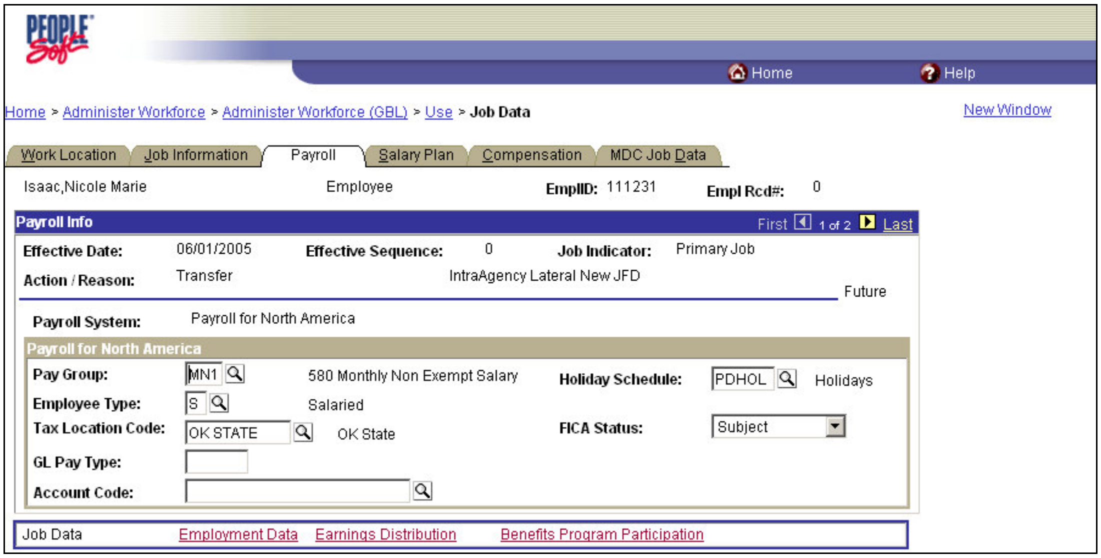
Supervisor Level – This field, indicating whether an employee is a supervisor, is optional. There is reporting capability for this field.

Empl Class – This is a user-updated field. Review and update as necessary.

***FLSA Status** – All Job Codes default to Nonexempt. Review and update as necessary.

Work Day Hours – Verify value or **enter** the appropriate number, such as: ‘8’ for full time.

PAYROLL PAGE



Pay Group – **Enter** the appropriate 'Pay Group' for your Agency. Update Holiday Schedule if appropriate. Update Employee Type if appropriate. The only time the system defaults Holiday Schedule and Employee Type is if the employee is a new hire.

Tax Location Code – select OK STATE from the drop down list.

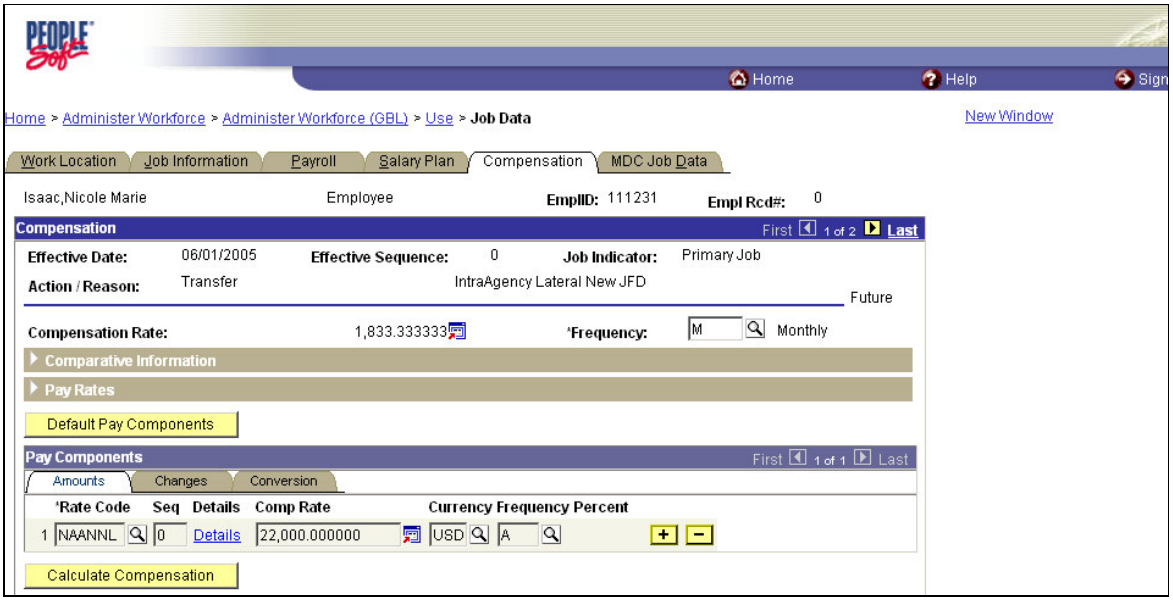
NOTE: Pay Group Changes – Mid-Month Considerations

1. Changing paygroups mid-month can cause two checks to be produced for the same payroll – ***if they move from ME1 to MN1*** or vice versa.
   However, ***if they move from MN1 to SN1*** the portion of the check assigned to the SN1 paygroup will not pay until the supplemental payroll is run which is scheduled to pay on the 12th of the following month.
2. The pay for the month will be split between the two checks
3. The BEA can be paid twice – once on each check
4. The deductions can be deducted from both checks
5. When you change from an SH1 to MN1, you have to remember to **enter** hours through Weekly Elapsed Time to pay the hourly portion and run Time Admin for it.

Our Recommendation:

Make paygroup changes effective the first of the pay period – which is usually the first of the month. You can go ahead and make any salary changes on the date they are due just don't change the paygroup until the first of the following month.

COMPENSATION PAGE



This scenario is a 'Lateral Transfer' and has no change in salary; however, other transactions may require that a new Compensation Rate be entered.

Under Pay Components:

Rate Code – NAANNL for Salaried Employees, NAHRLY for Hourly Employees

Comp Rate – **Enter** new rate

Frequency – Annual = A, Hourly = H; which default from the Rate Code

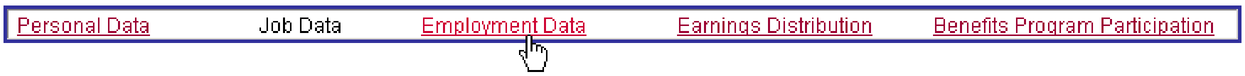
Click Calculate Compensation. The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates.

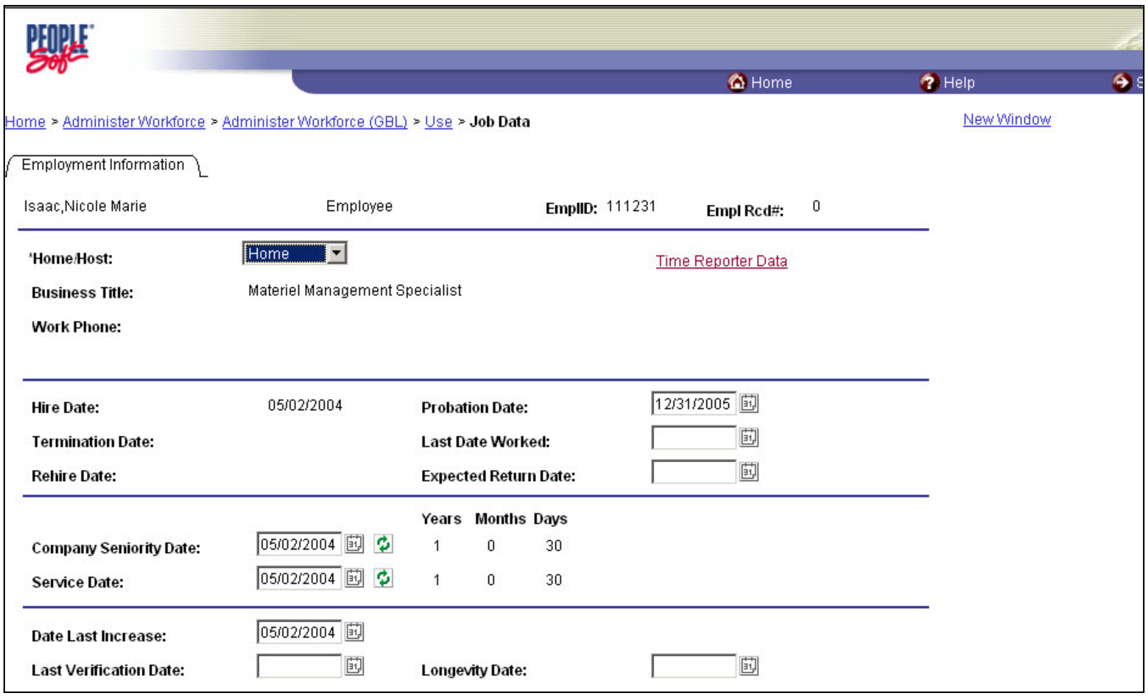
NOTE: You can click the Calculate Compensation to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values; however, you cannot modify the employee's pay components without recalculating the compensation.

NOTE: <u>You must click</u> Default Pay Components.

Employment Data Page

If the employee will serve a Trial Period, **click** the Employment Data link at the bottom of the page.





Probation Date – **Enter** the last date of the employee's Trial Period.

****Service Date – must be added. Required by the State of Oklahoma.** This date is used to determine your annual leave accrual level.

Time Reporter Page

Workgroup - Verify that the Workgroup is correct. If the Workgroup has changed, insert a new effective dated row (matching the effective date on Work Location page) and update the Workgroup.

Earnings Distribution Page

Account Code and Distrb% - Verify that the account(s) and amounts allocated are correct.

Benefit Program Participation Page

Verify that the employee's benefit program did not change. If the program for which the employee is eligible has changed, insert a new effective dated row and **enter** the appropriate values.

Select 

at the bottom of the page to save your changes.

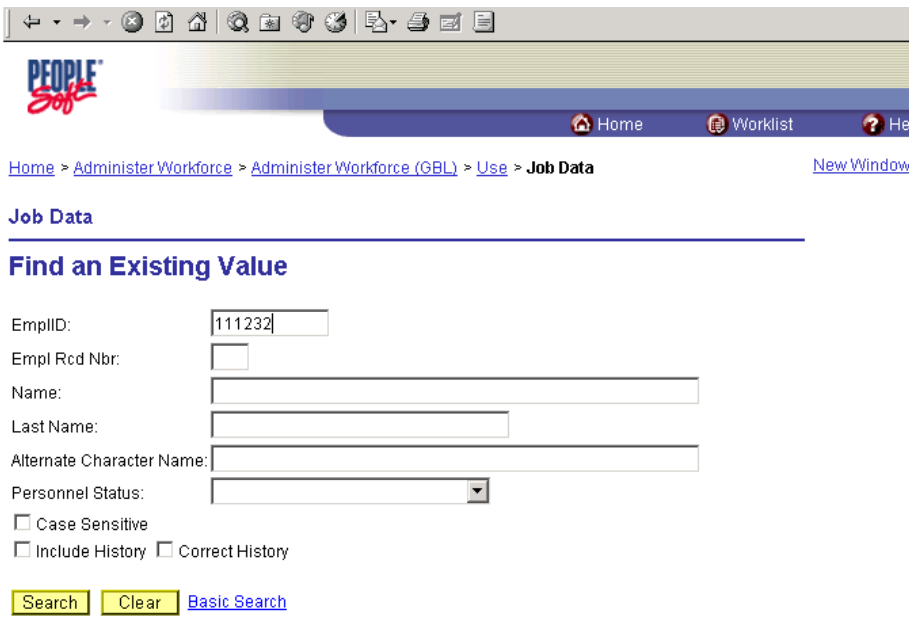
NOTE: The error message below will be displayed when saving if the employee has not been previously approved for the Classified job. Follow the instructions listed in the error box.

NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB DATA - JOB CHANGE WITHOUT POSITION NUMBER CHANGE

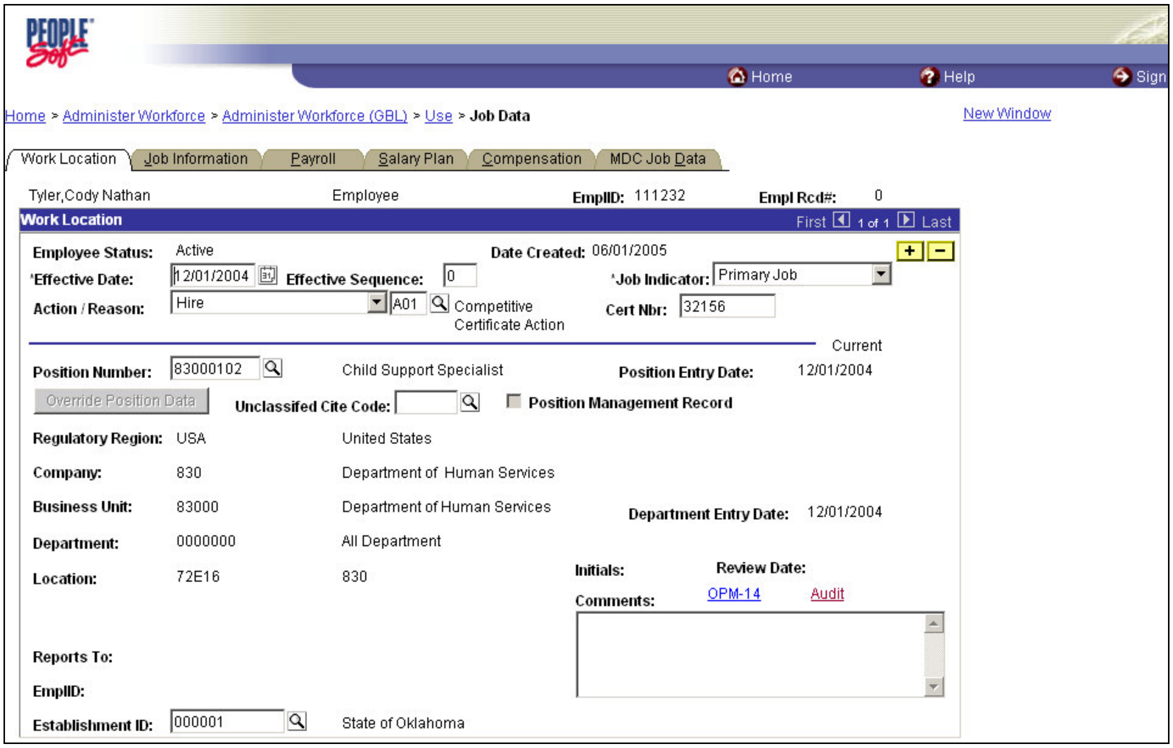
Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data or Current Job*
The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above. The employee's Job Data pages will be displayed.

JOB DATA – WORK LOCATION PAGE



Job Change Scenario*: Employee 'Cody Tyler' has completed his probationary period and will achieve Permanent status effective June 1, 2005.*

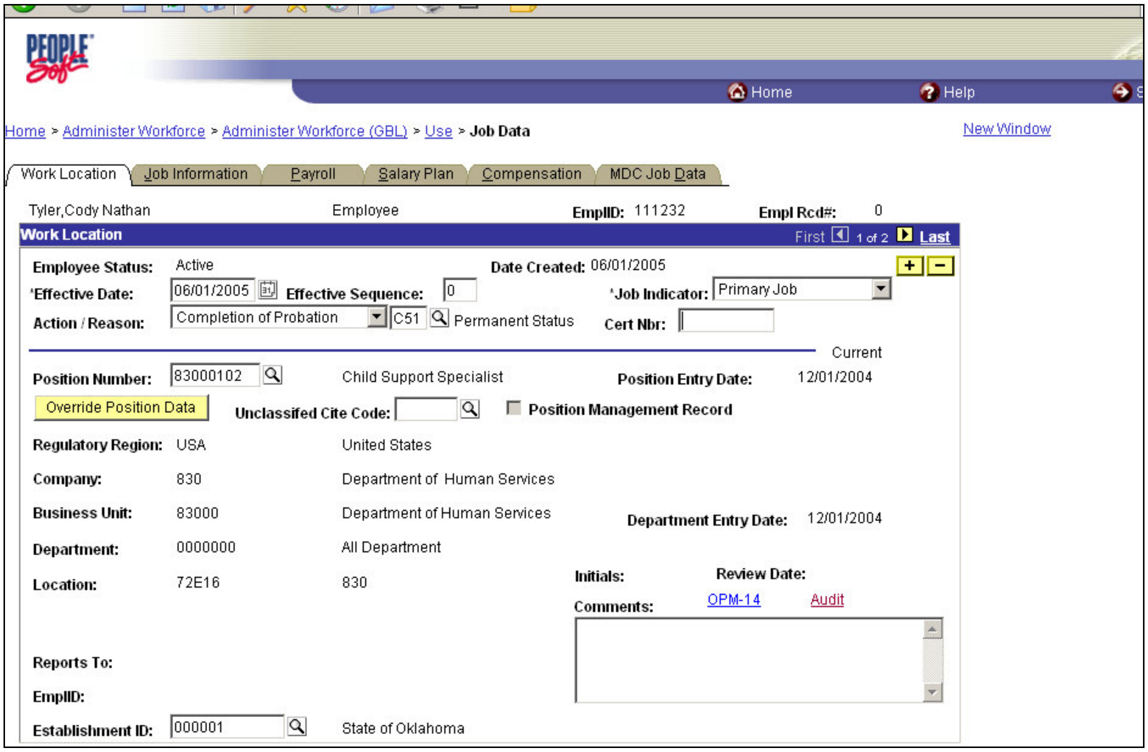
STEP I – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be entered into the new effective-dated record.

STEP II – ENTER NEW VALUES IN THE JOB DATA PAGES

WORK LOCATION PAGE



*****Effective Date** – ***Watch the effective date*** because it defaults to the current date. Change the date to when the new action becomes effective.

Action – **Select** the appropriate value from the dropdown menu.

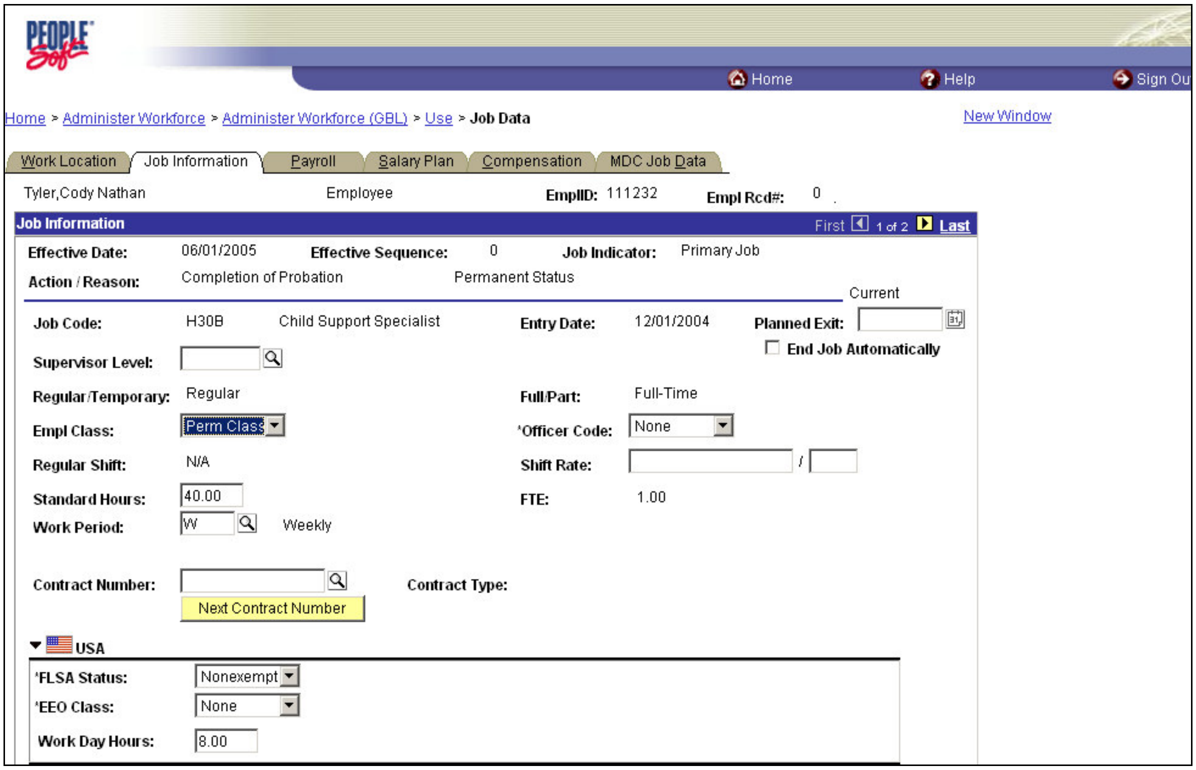
WITHOUT POSITION NUMBER CHANGE	
Action	**Reason (Transaction/Code)**
Completion of Probation	C26 Permanent Status with Salary Increase
	C51 Permanent Status without Salary Increase
Data Change	ADM Administrative Action
	C22 Pay Band (Grade) Change
	C40 Full to Part Time
	C41 Part to Full Time
	C42 Change in Part Time Percentage
	C70 Contract Renewal
	CCF Change in Comp Frequency
	CCI Change in Cost Center Information
	CDP Change Department

WITHOUT POSITION NUMBER CHANGE	
Action	**Reason (Transaction/Code)**
	CFS Change of Funding Source
	DIV Change Division
	EEO Change EEO Class
	FLS Change FLSA Status
	L12 Supplemented Workers Comp
	L13 Supplemented LWOP(Not WC)
	L14 Return to Regular Duty
	L23 Suspensions-Partial Day < 8 hours
	LOC Change in Location
	LVL Level Change
	MIL Change Military Pay Difference
	PGC Pay Group Change
	SUF Special Use Field Change
	WCC Workers Comp Code Change
Demotion	C08 Reallocation / Involuntary Demotion
	C18 Reallocation / Voluntary Demotion
Job Reclassification	C06 Direct Reclassification
Pay Rate Change	C20 Performance Pay
	C21 Cost of Living Increase
	C23 Class Special Entrance Rate
	C24 Classified SA/Legislative & Other
	C25 Unclassified SA/Legislative & Other
	C28 Equity Adjustment
	C29 Skill Based Pay Adjustment
	C32 Skill-based pay to base pay
	C45 Market Adjustment
	C60 Add Pay Differential
	C61 Remove Pay Differential
	C62 Change Existing Pay Differential
Probation	C50 Probation Extension / Adjustment
Transfer	C09 Reallocation / Lateral Transfer

Reason – **Select** the appropriate value from the Lookup.

Cert Nbr – If populated, delete number

JOB INFORMATION PAGE



Full / Part – Review and update as necessary.

Supervisor Level – This field, indicating whether an employee is a supervisor, is optional. There is reporting capability for this field.

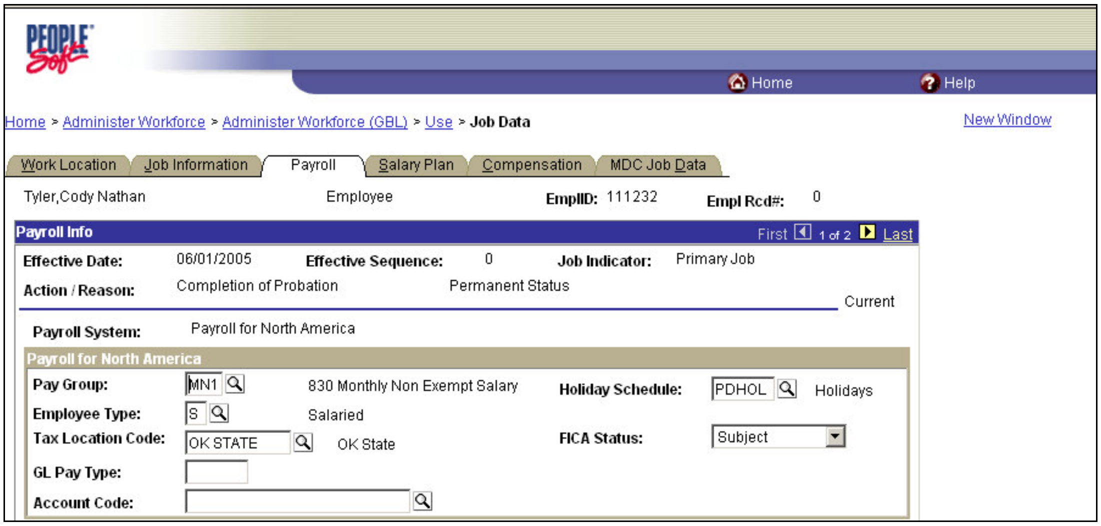
Empl Class – This is a user-updated field. Review and update as necessary.

Standard Hours – Review and update as necessary.

***FLSA Status** – All Job Codes default to Nonexempt. Review and update as necessary.

Work Day Hours – Verify value or **enter** the appropriate number, such as: ‘8’ for full time.

PAYROLL PAGE



Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data

New Window

Work Location | Job Information | Payroll | Salary Plan | Compensation | MDC Job Data

Tyler,Cody Nathan Employee EmplID: 111232 Empl Rcd#: 0

Payroll Info First 1 of 2 Last

Effective Date: 06/01/2005 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Completion of Probation Permanent Status Current

Payroll System: Payroll for North America

Payroll for North America

Pay Group: MN1 830 Monthly Non Exempt Salary Holiday Schedule: PDHOL Holidays

Employee Type: S Salaried

Tax Location Code: OK STATE OK State FICA Status: Subject

GL Pay Type:

Account Code:

Pay Group – **Enter** the appropriate 'Pay Group' for your Agency and tab out of the field. Update the Holiday Schedule if appropriate. Update the Employee Type if appropriate.

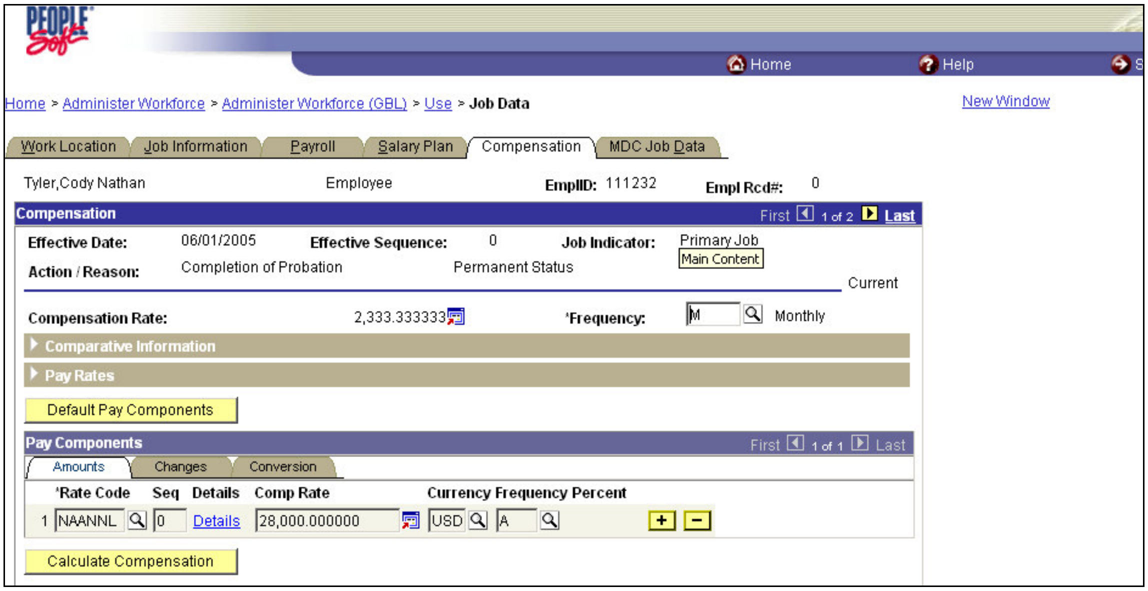
NOTE: Pay Group Changes – Mid-Month Considerations

1. Changing paygroups mid-month can cause two checks to be produced for the same payroll – ***if they move from ME1 to MN1*** or vice versa.
   However, ***if they move from MN1 to SN1*** the portion of the check assigned to the SN1 paygroup will not pay until the supplemental payroll is run which is scheduled to pay on the 12th of the following month.
2. The pay for the month will be split between the two checks
3. The BEA can be paid twice – once on each check
4. The deductions can be deducted from both checks
5. When you change from an SH1 to MN1, you have to remember to **enter** hours through Weekly Elapsed Time to pay the hourly portion and run Time Admin for it.

Our Recommendation:

Make paygroup changes effective the first of the pay period – which is usually the first of the month. You can go ahead and make any salary changes on the date they are due just don't change the paygroup until the first of the following month.

COMPENSATION PAGE



This scenario is a 'Permanent Status' and has no change in salary; however, other transactions may require that a new Compensation Rate be entered.

Employees on a Salary Step: (No manual entries required)

Click Default Pay Components **to execute Pay Component defaults.**

NOTE: You must select Default Pay Components **under the following conditions in order for the Default Pay Components to be executed:**

Changes to Job Code, Position numbers, Location and/or Department fields.

Compensation Rate (Display only)

***Frequency –** (Indicates the frequency the employee will be paid). **Enter** the appropriate value:

- M – Employees paid Monthly
- B – Employees paid Bi-weekly

Pay Components

***Rate Code** – **Select** the appropriate value from the Lookup:

- NAANNL – Salaried Employees (paid either Monthly or Bi-weekly)
- NAHRLY – Hourly employees

Comp Rate – **Enter** the appropriate dollar value, either the Annual Salary or Hourly Rate.

Frequency – (Indicates the frequency of the salary). The Frequency value will default from the Rate Code: 'A' if the Comp Rate is an annual amount and 'H' if the Comp Rate is an hourly amount.

Currency – 'USD' (US Dollar) auto-populates when the Rate Code is selected from the Lookup.

For All Employees:

Click Calculate Compensation. The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates.

Click the Pay Rates dropdown arrow to view the calculations.

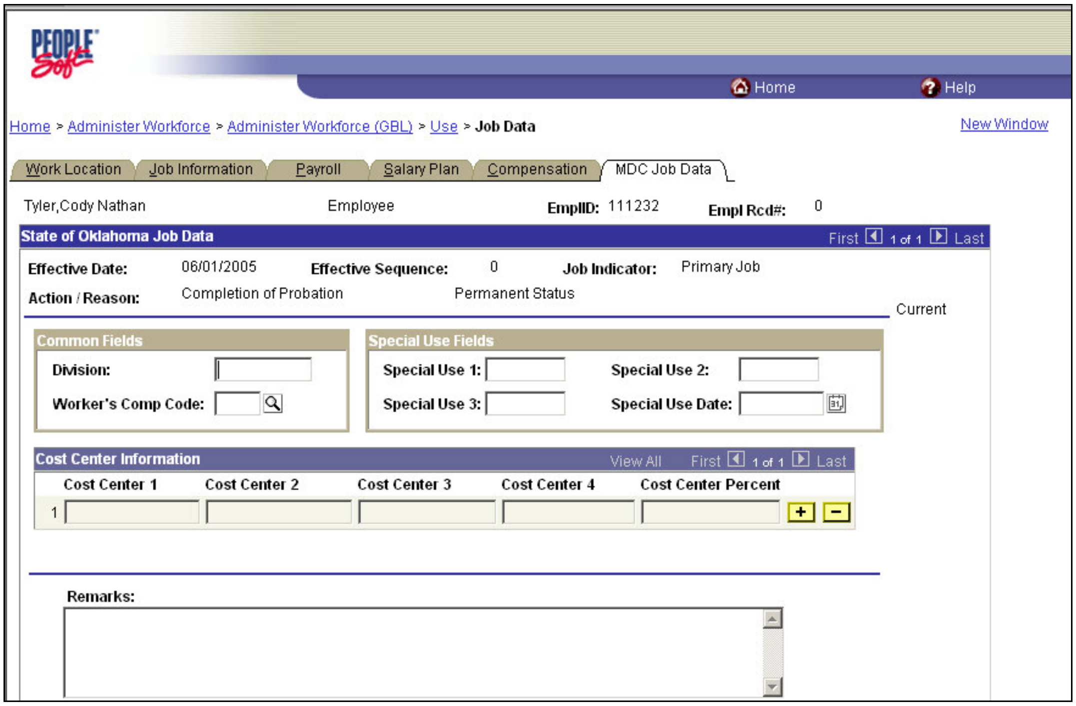
Pay Rates

Daily	92.307692 USD	**Monthly**	2,000.000000 USD
Weekly	461.538462 USD	**Annual**	24,000.000000 USD

NOTE: You can click Calculate Compensation **to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values; however, you cannot modify the employee's pay components without recalculating the compensation.**

MDC JOB DATA – (OPTIONAL PER AGENCY)

NOTE: The MDC Job Data page is a custom page developed for various uses by different agencies. This is not a required page; however, various Agencies may choose to enter information as described.



Division – Replaces the Division field from the legacy system. **Enter** if applicable.

Worker's Comp Code – **Enter** the WCC number for reporting and billing purposes, if applicable.

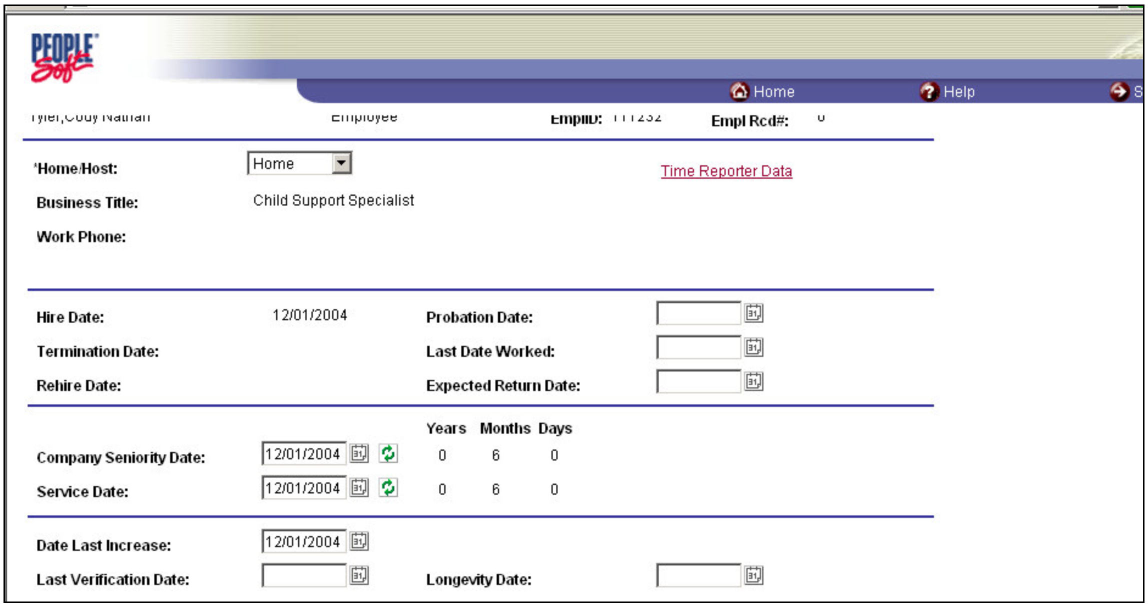
Special Use – Free form fields an Agency can use to **enter** information of its choice. Suggested uses:

- Number of months, days and years the longevity date needs to be backed up for prior service.
- Date the system needs to be backed up to after a break in service for longevity.
- Department numbers meaningful to a specific agency.
- Agency employee ID numbers.
- Agency with other information that is currently needed or used.

Cost Center Information – The Cost Center Percent field must equal 100% or 0% if not used. For each employee level row of data, multiple Cost Center rows can be entered. If there are multiple Cost Center rows, the combined total of each Cost Center Percent field must be equal to 100%.

Remarks – Free text that will be printed on the OPM-14. PROVIDE THE AMOUNT OF SHIFT DIFFERENTIAL PAY IN REMARKS.

EMPLOYMENT DATA PAGE



Probation Date – Delete probation date when employee achieves Permanent status.

****Service Date – must be added. Required by the State of Oklahoma.** This date is used to determine your annual leave accrual level.

BENEFIT PROGRAM PARTICIPATION PAGE

Verify that the employee's benefit program did not change. If the program for which the employee is eligible has changed, insert a new effective dated row, and **enter** the appropriate values.

Select 

at the bottom of the page to save your changes.

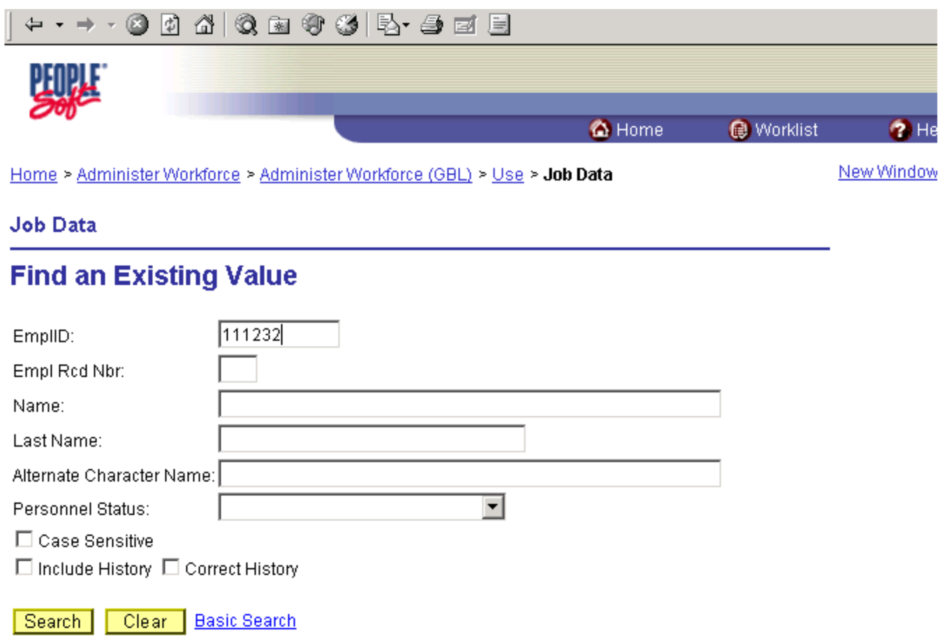
NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB DATA – SAME DATE – EFFECTIVE SEQUENCE

If more than one transaction is effective on the same day, the 'Effective Sequence' number allows them to be entered separately and distinctly.

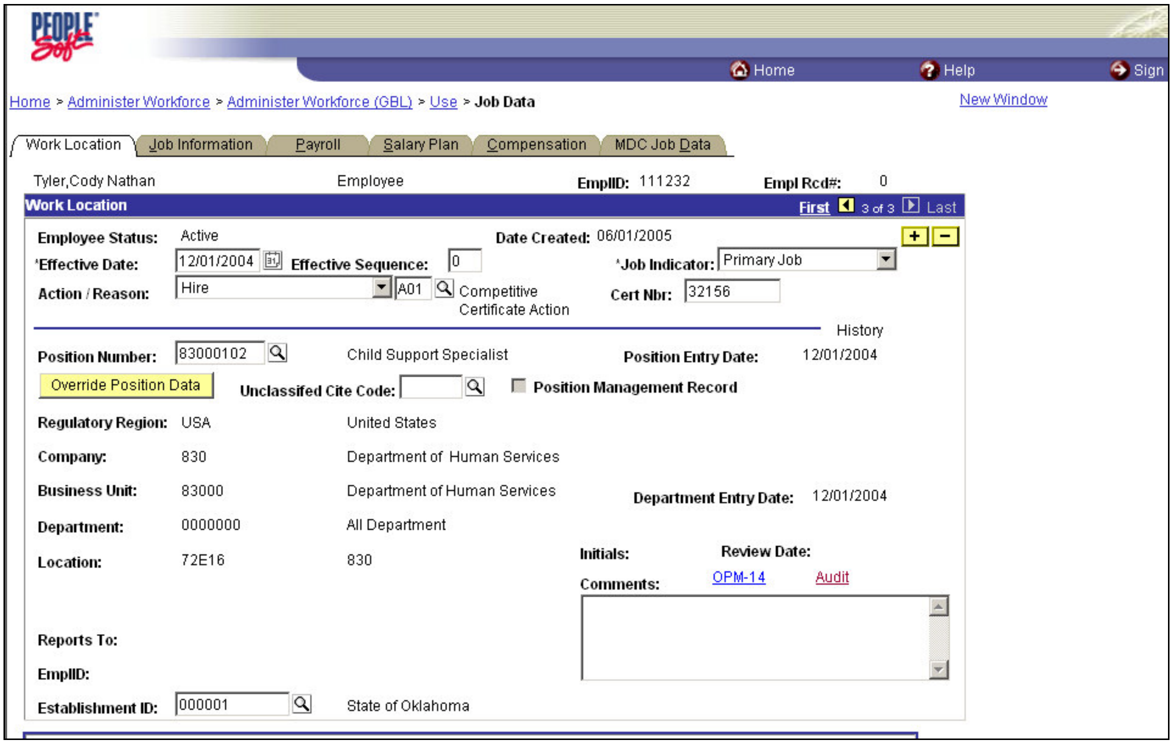
Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*
The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . Last Name is shown above.

The employee's Job Data pages will be displayed.



Scenario: *Employee Cody Tyler was hired on Probation December 1, 2004 and will achieve Permanent status June 1, 2005. As a permanent employee he will be eligible to transfer to another position. His transfer will also be effective June 1, 2005.*

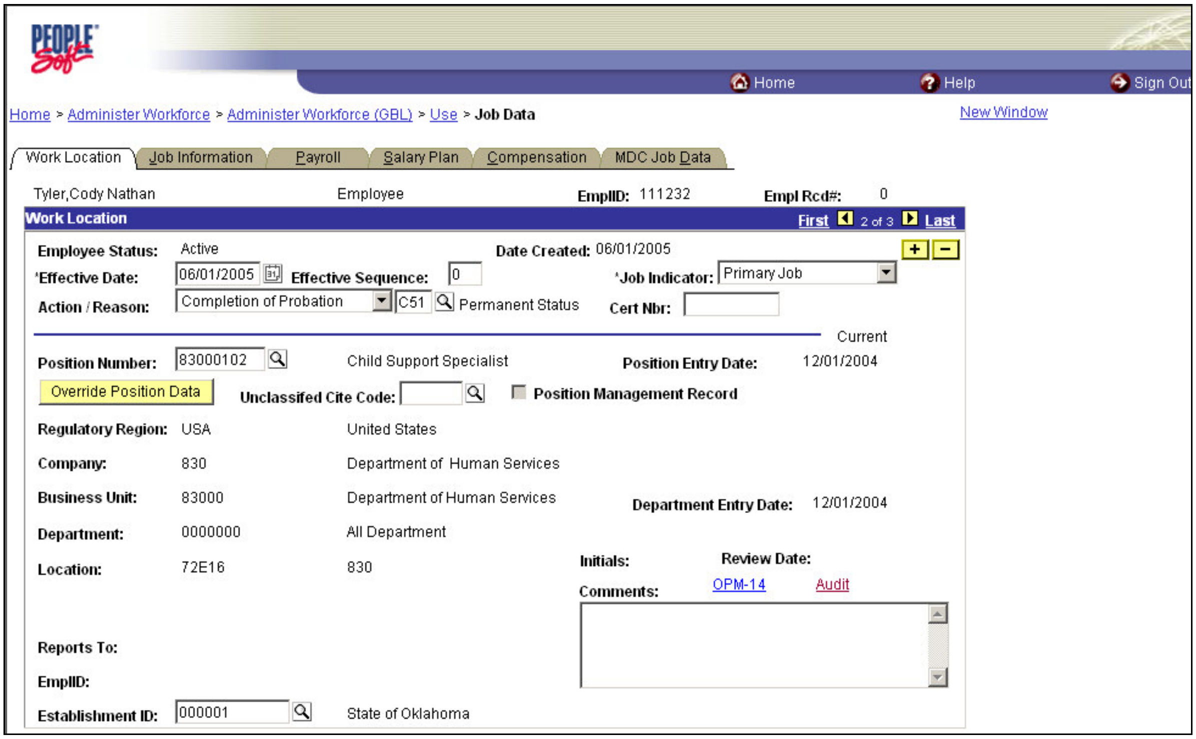
STEP I – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be entered into the new effective-dated record.

STEP II – ENTER FIRST TRANSACTION IN THE JOB DATA PAGES

WORK LOCATION PAGE



Effective Date** – ***Watch the effective date since it defaults to the current date. Change to the date the transaction is effective.

Action – **Select** the appropriate value from the dropdown menu.

Reason – **Select** the appropriate value from the Lookup.

Make additional data changes, as required, on other Job Data pages.

Select 

at the bottom of the page to save your changes.

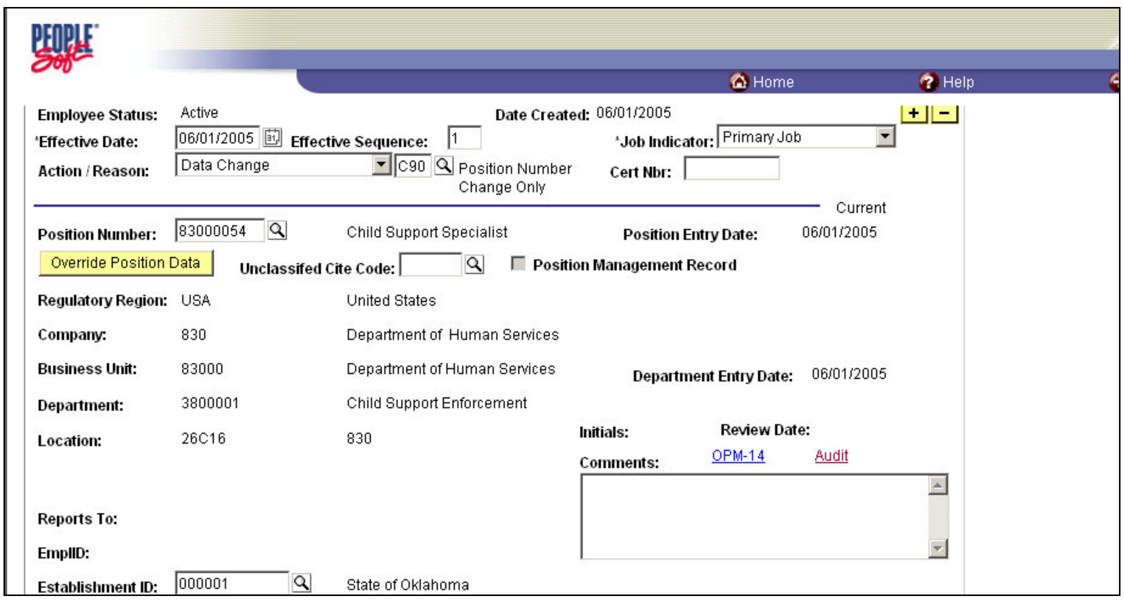
STEP III – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be entered into the new record.

STEP IV – ENTER SECOND TRANSACTION IN THE JOB DATA PAGES

WORK LOCATION PAGE



Effective Date** – ***Watch the effective date since it defaults to the current date. Change to the date the transaction is effective. In this scenario, the latest transaction will have the same effective date as the previous.

Effective Sequence – Increase the number by one. The default for the first transaction on any day is ‘0’. A second transaction would be effective sequence ‘1’, a third would be effective sequence ‘2’, etc.

Action – **Select** the appropriate value from the dropdown menu.

Reason – **Select** the appropriate value from the Lookup.

Make additional data changes, as required, on other Job Data pages.

Select 

at the bottom of the page to save your changes.

JOB DATA – PROMOTION

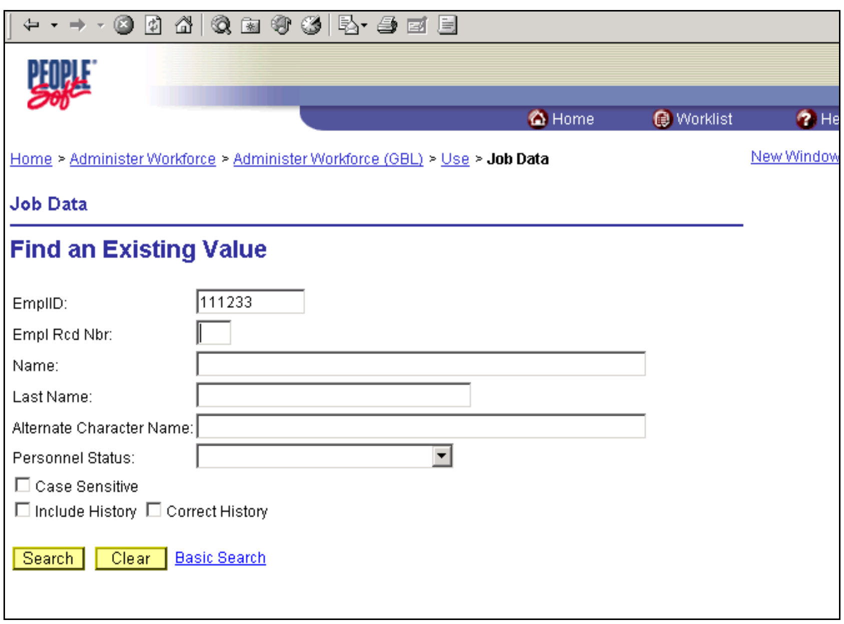
Action	Reason (Transaction/Code)
Promotion	C01 Promotion
	C07 Reallocation Promotion

NOTE: For Career Progression, (Classified), and Underfill Promotion, (Unclassified, refer to Job Data – Career Progression, (Classified) and Underfill Promotion, (Unclassified) section.

NOTE: The State of Oklahoma Merit Rule 530:10-9-10 requires certification of qualifications before promotions, demotions, transfers, and reinstatements for classified positions. Refer to the 4B Processing section of this manual for further information.

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*
The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above. The employee's Job Data pages will be displayed.

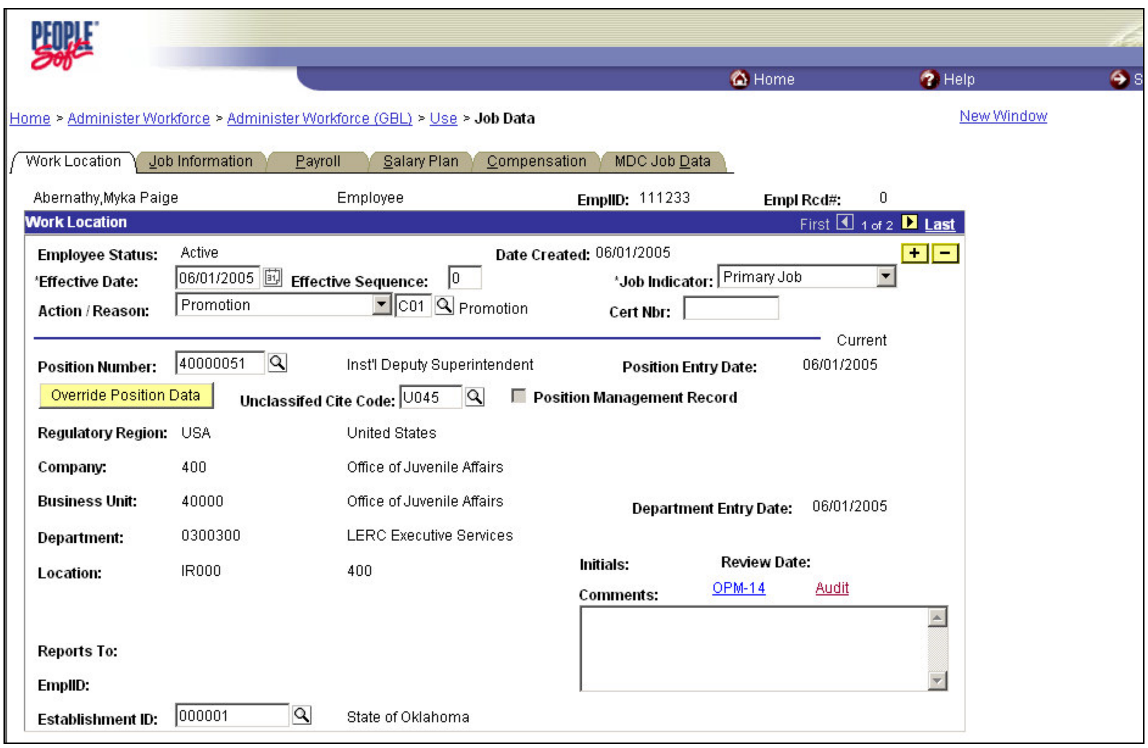
STEP I – INSERT A NEW ROW

Click  located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be entered into the new effective-dated record.

STEP II – ENTER NEW VALUES IN THE JOB DATA PAGES

WORK LOCATION PAGE



Effective Date** – ***Watch the effective date since it defaults to the current date. Change to the date the promotion becomes effective.

Action – **Select** Promotion

Reason – **Select** the appropriate value from the Lookup.

Position Number – Use the mouse to position the cursor in the Position Number field. **Enter** the appropriate position number. When you tab out of the Position field, the system automatically defaults related fields throughout the Job Data component pages. Be sure to verify all default information.

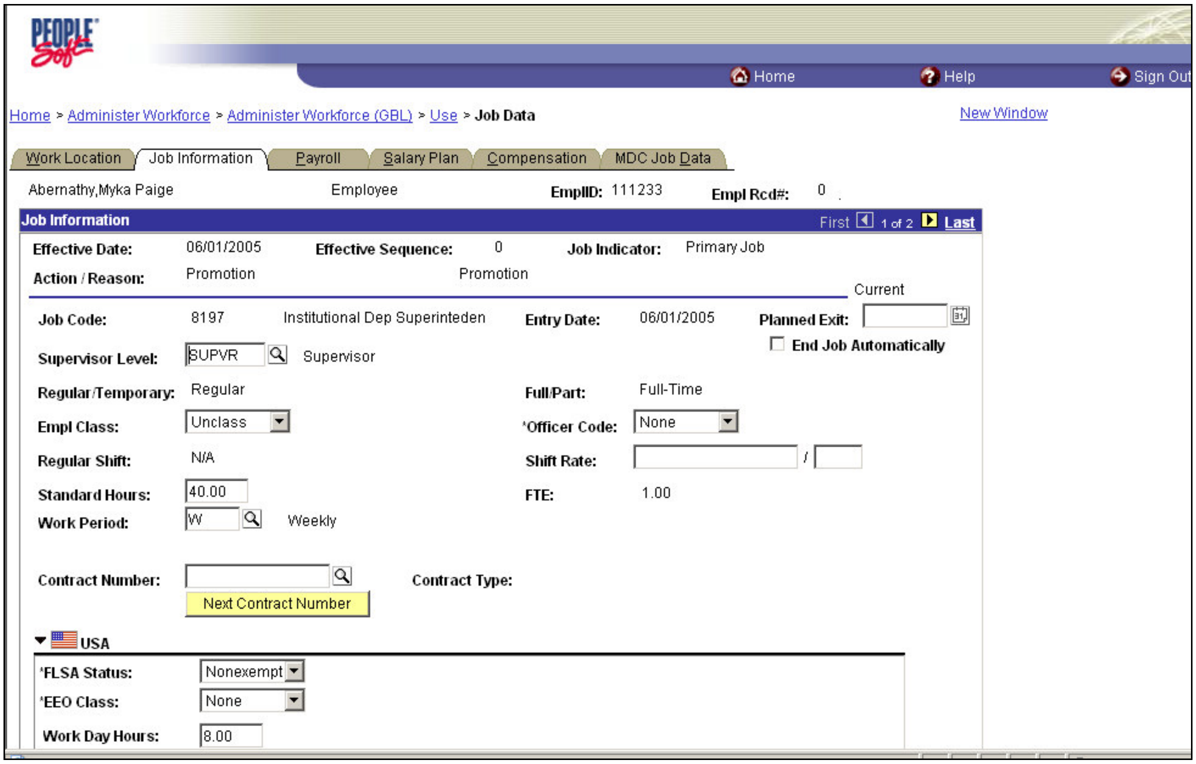
Unclassified Cite Code – required for all Unclassified actions. The value for this field will default from the Position Number. This field can be overridden if necessary.

Alternate Hire Note: If this is an Alternate Hire (the employee will be assigned a lower level of the Job Family than the level assigned to the position), it will be necessary to **click** the Override Position Data button so that the correct Job Code can be entered on the Job Information page.

Establishment ID – Ensure you have an Establishment ID entered on Work Location. We current are using one value: 000001.

JOB INFORMATION PAGE

Click the ‘Job Information’ Tab.



Enter information in the following fields:

***Job Code** – Defaults from the ‘Position Number’ selected earlier. If this is an Alternate Hire, make the appropriate change to the Job Code.

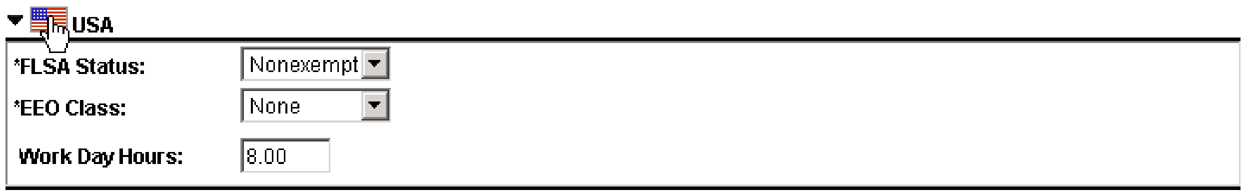
Supervisor Level – This field, indicating whether an employee is a supervisor, is optional. There is reporting capability for this field.

Full / **Part** – Review and update as appropriate.

Empl Class – **Select** one from the dropdown menu. This is a user-updated field.

- PClass/TP – Permanent Classified/Trial Period
- Perm Class – Permanent Classified
- Prob Class – Probationary Classified (not applicable for Promotion)
- Unclassified

Click the dropdown arrow next to the USA flag.

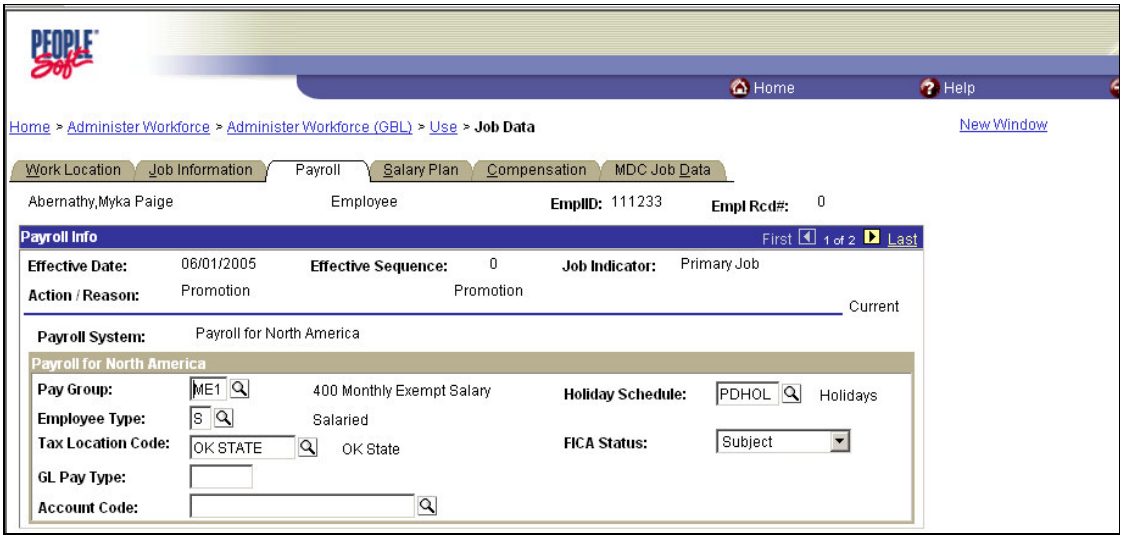


***FLSA Status** – Verify Value

Work Day Hours – Verify Value

PAYROLL PAGE

Click the 'Payroll' Tab.



Pay Group – **Enter** the appropriate 'Pay Group' for your Agency and tab out of it. Update the Holiday Schedule if appropriate. Update the Employee Type if appropriate.

NOTE: Pay Group Changes – Mid-Month Considerations

1. Changing paygroups mid-month can cause two checks to be produced for the same payroll – ***if they move from ME1 to MN1***.
   However, ***if they move from MN1 to SN1*** the portion of the check assigned to the SN1 paygroup will not pay until the supplemental payroll is run which is scheduled to pay on the 12th of the following month.
2. The pay for the month will be split between the two checks
3. The BEA can be paid twice – once on each check
4. The deductions can be deducted from both checks
5. When you change from an SH1 to MN1, you have to remember to **enter** hours through Weekly Elapsed Time to pay the hourly portion and run Time Admin for it.

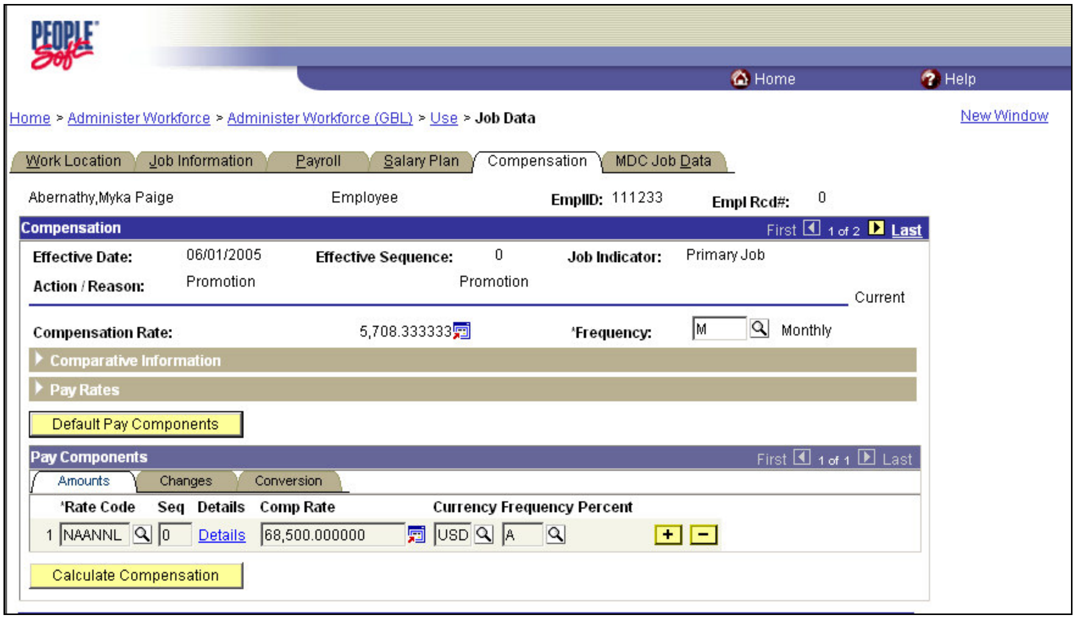
Our Recommendation:

Make paygroup changes effective the first of the pay period – which is usually the first of the month. You can go ahead and make any salary changes on the date they are due just don't change the paygroup until the first of the following month.

Tax Location Code – Select the value of OK STATE from the drop down list.

COMPENSATION PAGE

Click the 'Compensation' Tab.



Comp Rate – The Compensation Rate may be changed by entering a new dollar amount or by entering a percentage of increase.

Employees on a Salary Step: (No manual entries required)

Click [Default Pay Components] **to execute Pay Component defaults.**

NOTE: You must select [Default Pay Components] **under the following conditions in order for the Default Pay Components to be executed:**

Changes to Job Code, Position Number, Location and/or Department fields.

Compensation Rate (Display only)

***Frequency –** (Indicates the frequency the employee will be paid). **Enter** the appropriate value:

- M – Employees paid Monthly
- B – Employees paid Bi-weekly

Pay Components

***Rate Code** – **Select** the appropriate value from the Lookup:

- NAANNL – Salaried Employees (paid either Monthly or Bi-weekly)
- NAHRLY – Hourly employees

Comp Rate – **Enter** the appropriate dollar value, either the Annual Salary or Hourly Rate.

Frequency – (Indicates the frequency of the salary). The Frequency value will default from the Rate Code: 'A' if the Comp Rate is an annual amount and 'H' if the Comp Rate is an hourly amount

Currency – 'USD' (US Dollar) auto-populates when the Rate Code is selected from the Lookup.

For All Employees:

Click Calculate Compensation . The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates.

Click the Pay Rates dropdown arrow to view the calculations.

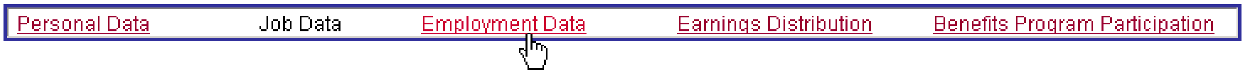
Pay Rates

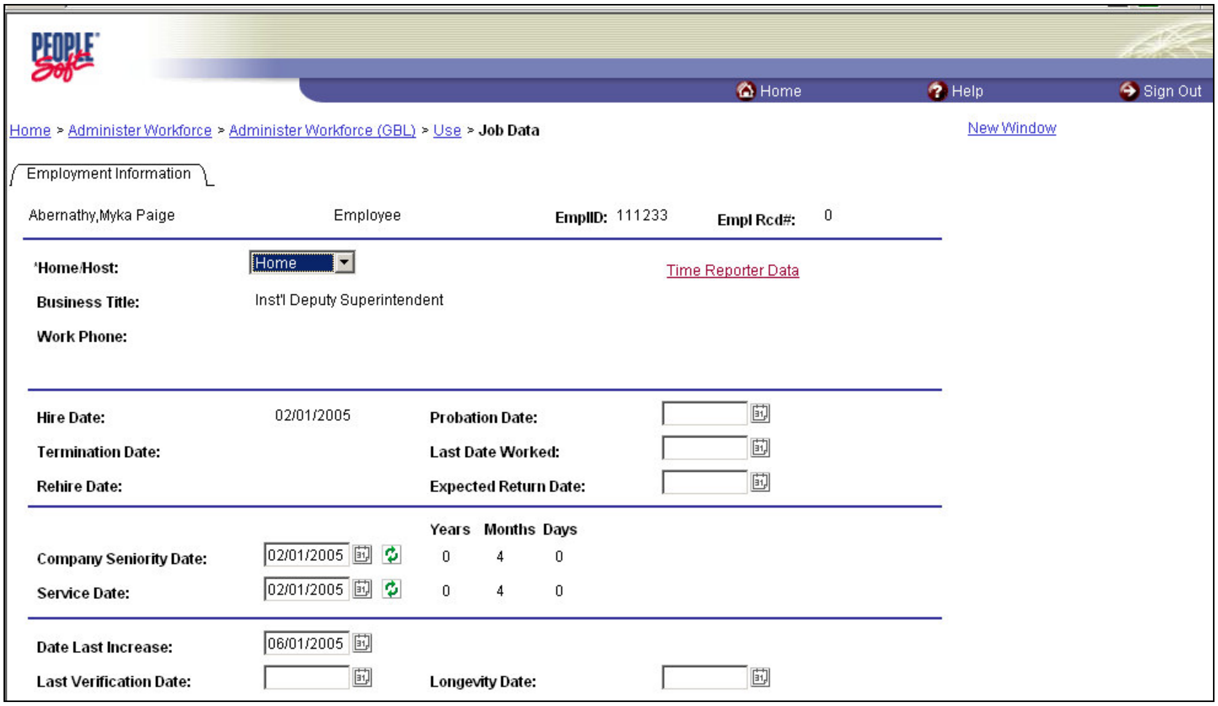
Daily	92.307692	USD	**Monthly**	2,000.000000	USD
Weekly	461.538462	USD	**Annual**	24,000.000000	USD

NOTE: You can click Calculate Compensation to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values. However, you cannot modify the employee's pay components without recalculating the compensation.

EMPLOYMENT DATA PAGE

If the employee will serve a Trial Period, **click** the Employment Data link at the bottom of the page.





***Service Date – must be added. Required by the State of Oklahoma.** This date is used to determine your annual leave accrual level.

Probation Date – **Enter** the last date of the employee's Trial Period if applicable.

Select  at the bottom of the page to save your changes.

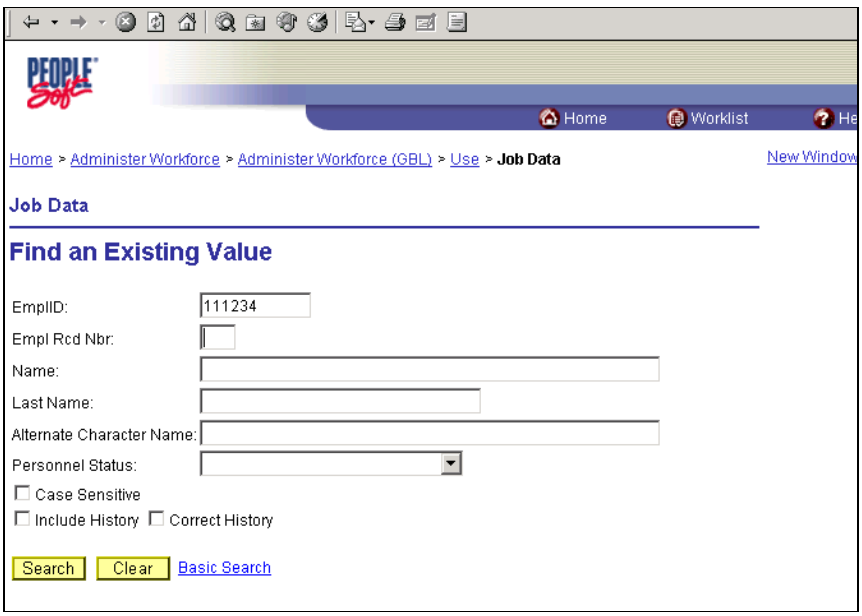
NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB DATA – CAREER PROGRESSION (CLASSIFIED) AND UNDERFILL PROMOTION (UNCLASSIFIED)

Action	Reason (Transaction/Code)
Promotion	C15 Underfill Promotion
	C16 Career Progression

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*
The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above. The employee's Job Data pages will be displayed.

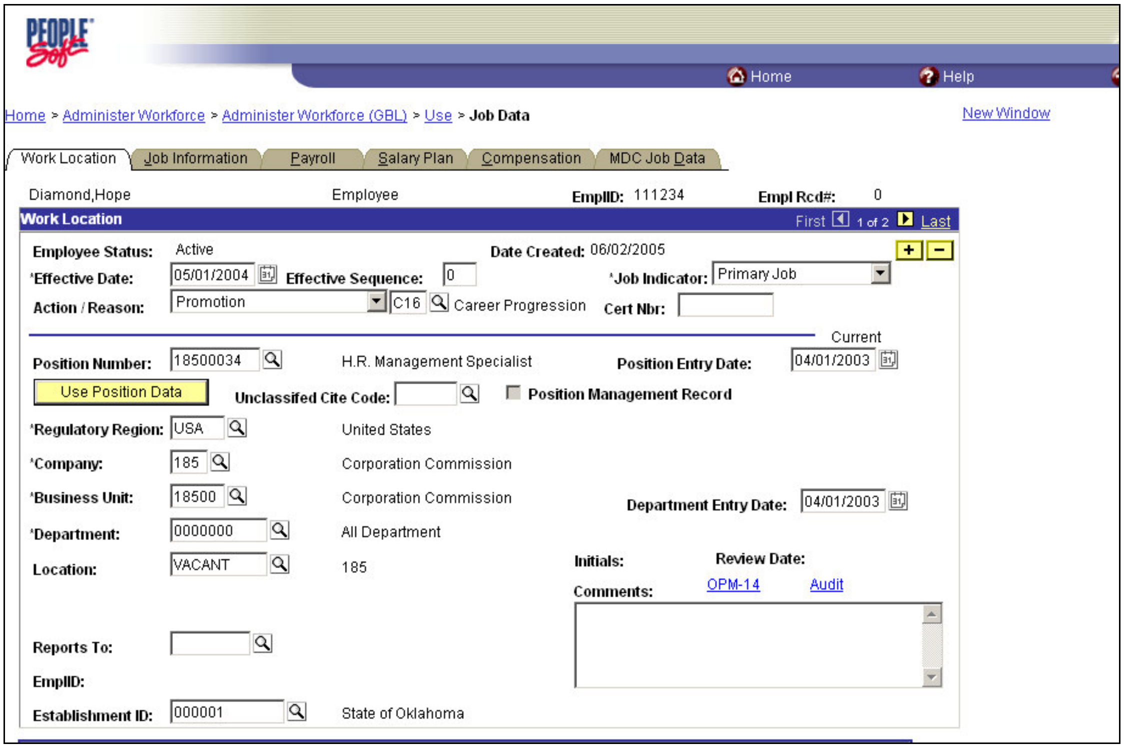
STEP I – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be entered into the new effective-dated record, as shown below.

STEP II – ENTER NEW VALUES IN THE JOB DATA PAGES

WORK LOCATION PAGE



***Effective Date** – Defaults to the current date. If necessary, change to the date the promotion becomes effective.

Action – **Select** Promotion

Reason – **Select** the appropriate value from the Lookup.

Position Number – Will remain the same for a Career Progression/Underfill Promotion

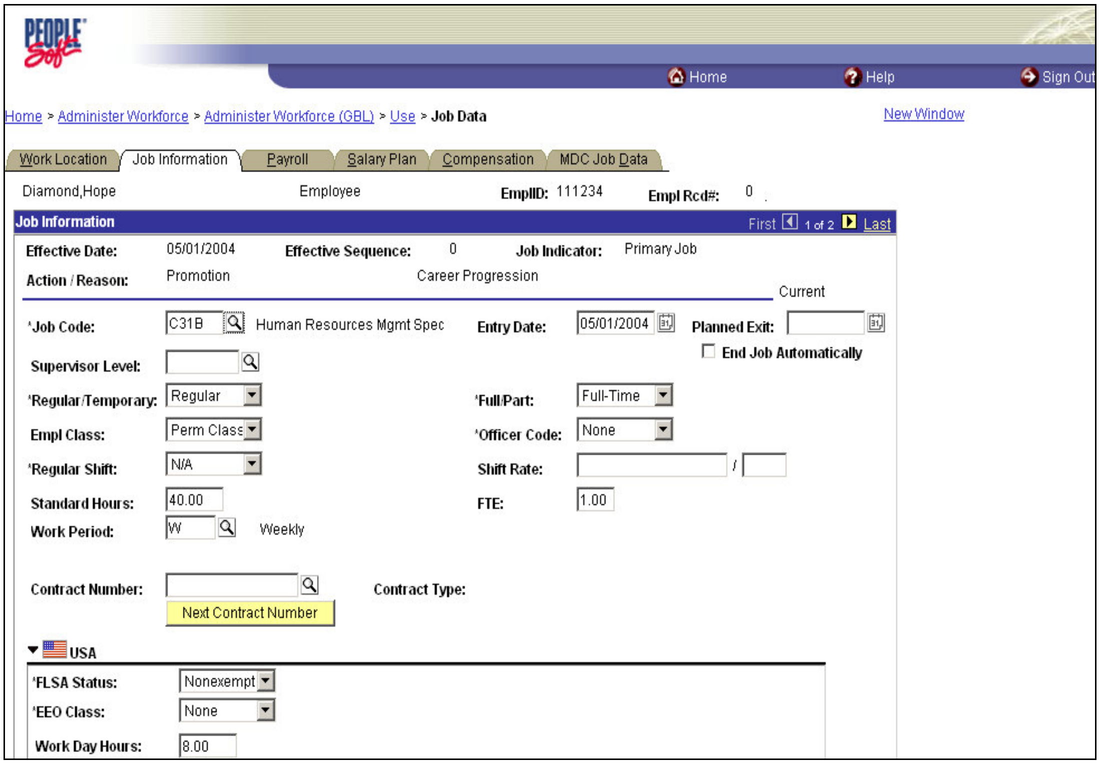
NOTE: When the employee first entered this position, it was necessary to **click** the Override Position Data button to **enter** the correct Job Code on the Job Information page. The employee's record has remained in the Override function. The Job Code field on the Job Information page will be accessible so that the new Job Code can be entered.

ONCE THE JOB CODE OF THE EMPLOYEE HAS BEEN UPDATED TO MATCH THE JOB CODE OF THE POSITION, RETURN TO THE WORK LOCATION PAGE AND CLICK THE *USE POSITION DATA* BUTTON.

Unclassified Cite Code – required for all Unclassified actions. The value for this field will default from the Position Number. This field will not be changed for an underfill promotion.

JOB INFORMATION PAGE

Click the ‘Job Information’ Tab.



Enter information in the following fields:

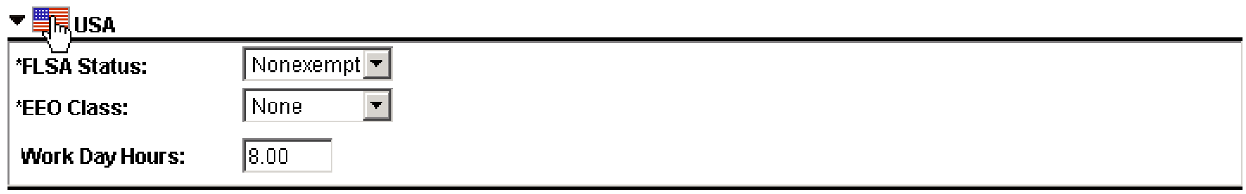
***Job Code** – **Enter** the appropriate value from the Lookup.

Supervisor Level – This field, indicating whether an employee is a supervisor, is optional. There is reporting capability for this field.

Regular/Temporary – Regular/Temporary needs to be reviewed and updated as necessary (e.g., Regular for classified and unclassified positions that are not temporary; Temporary for the unclassified, temp positions; etc.).

Empl Class – Empl Class needs to be reviewed and updated as necessary.

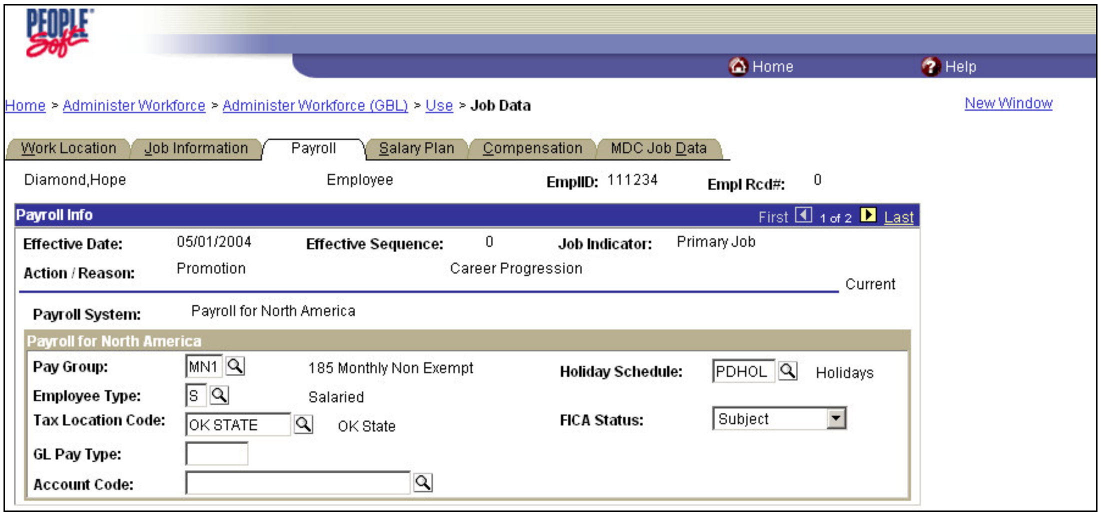
Click the dropdown arrow next to the USA flag.



*__FLSA Status__ – Verify Value

PAYROLL PAGE

Click the 'Payroll' Tab.



Pay Group – Verify the appropriate 'Pay Group'. If necessary to change, **enter** the correct value and tab out of the field. Update the Holiday Schedule as required. Update the Employee Type as required.

NOTE: Pay Group Changes – Mid-Month Considerations

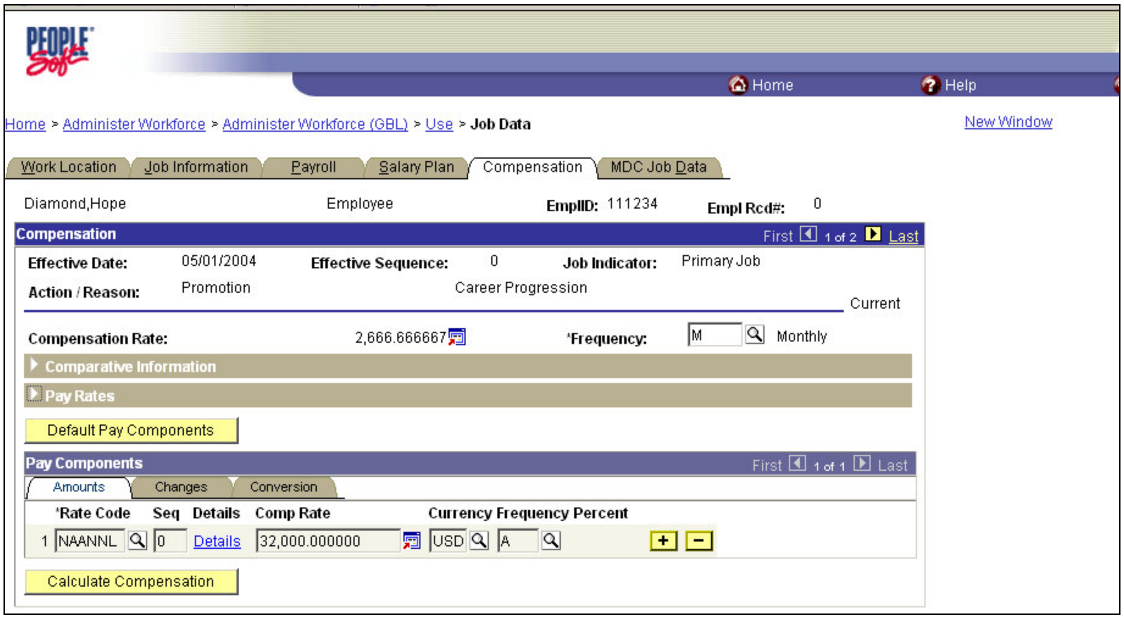
1. Changing paygroups mid-month can cause two checks to be produced for the same payroll – ***if they move from ME1 to MN1*** or vice versa.
   However, ***if they move from MN1 to SN1*** the portion of the check assigned to the SN1 paygroup will not pay until the supplemental payroll is run which is scheduled to pay on the 12th of the following month.
2. The pay for the month will be split between the two checks
3. The BEA can be paid twice – once on each check
4. The deductions can be deducted from both checks
5. When you change from an SH1 to MN1, you have to remember to **enter** hours through Weekly Elapsed Time to pay the hourly portion and run Time Admin for it.

Our Recommendation:

Make paygroup changes effective the first of the pay period – which is usually the first of the month. You can go ahead and make any salary changes on the date they are due just don't change the paygroup until the first of the following month.

COMPENSATION PAGE

Click the ‘Compensation’ Tab.



Comp Rate – The Compensation Rate may be changed by entering a new dollar amount or by entering a percentage of increase.

Employees on a Salary Step: (No manual entries required)

Click Default Pay Components **to execute Pay Component defaults.**

NOTE: You must select Default Pay Components **under the following conditions in order for the Default Pay Components to be executed:**

Changes to Location, Department, Job Code and/or Position Number fields.

Compensation Rate (Display only)

***Frequency –** (Indicates the frequency the employee will be paid). **Enter** the appropriate value:

- M – Employees paid Monthly
- B – Employees paid Bi-weekly

Pay Components

***Rate Code** – **Select** the appropriate value from the Lookup:

- NAANNL – Salaried Employees (paid either Monthly or Bi-weekly)
- NAHRLY – Hourly employees

Comp Rate – **Enter** the appropriate dollar value, either the Annual Salary or Hourly Rate.
Frequency – (Indicates the frequency of the salary). The Frequency value will default from the Rate Code: 'A' if the Comp Rate is an annual amount and 'H' if the Comp Rate is an hourly amount
Currency – 'USD' (US Dollar) auto-populates when the Rate Code is selected from the Lookup.

Click Calculate Compensation. The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates.

Click the Pay Rates dropdown arrow to view the calculations.

Pay Rates

Daily	115.384615	USD	**Monthly**	2,500.000000	USD
Weekly	576.923077	USD	**Annual**	30,000.000000	USD

NOTE: You can click Calculate Compensation to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values. However, you cannot modify the employee's pay components without recalculating the compensation.

REMINDER: When the employee first entered this position, it was necessary to **click** the Override Position Data button to **enter** the correct Job Code on the Job Information page. The employee's record has remained in the Override function. The Job Code field on the Job Information page will be accessible so that the new Job Code can be entered.
ONCE THE JOB CODE OF THE EMPLOYEE HAS BEEN UPDATED TO MATCH THE JOB CODE OF THE POSITION, RETURN TO THE WORK LOCATION PAGE AND CLICK THE *USE POSITION DATA* BUTTON.

Select Save at the bottom of the page to save your changes.

NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

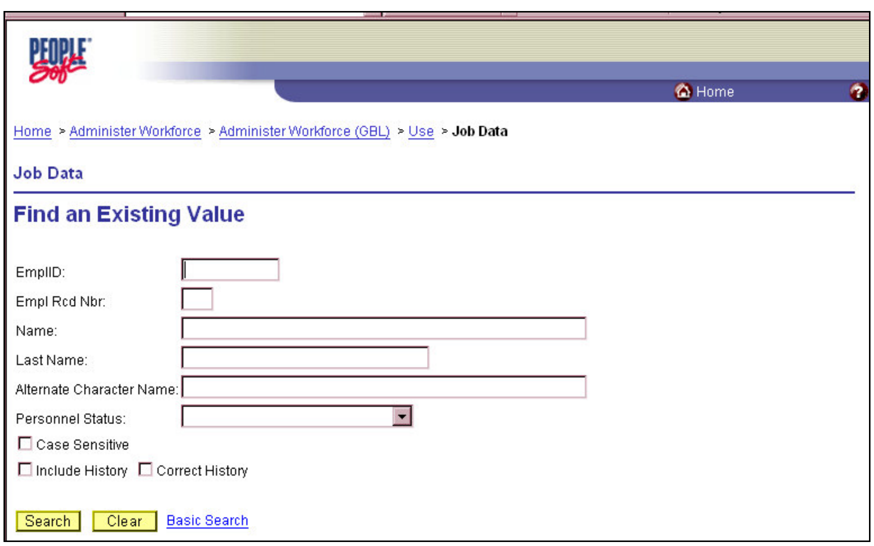
JOB DATA - PAY RATE CHANGE

Action	Reason (Transaction/Code)
Pay Rate Change	C20 Performance Pay
	C21 Cost of Living Increase
	C23 Class Special Entrance Rate
	C24 Classified Salary Adj / Legislative & Other
	C25 Unclassified Salary Adj / Legislative & Other
	C28 Equity Adjustment
	C29 Skill Based Pay Adjustment
	C32 Skill-based Pay to Base Pay
	C45 Market Adjustment
	C60 Add Pay Differential
	C61 Remove Pay Differential
	C62 Change Existing Pay Differential

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*

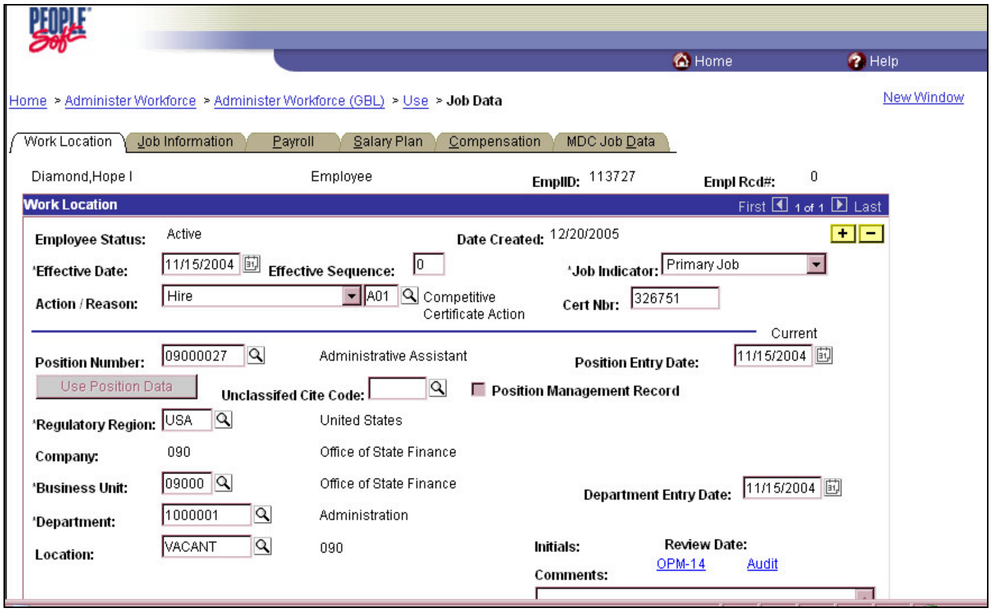
The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . The employee's Job Data pages will be displayed.

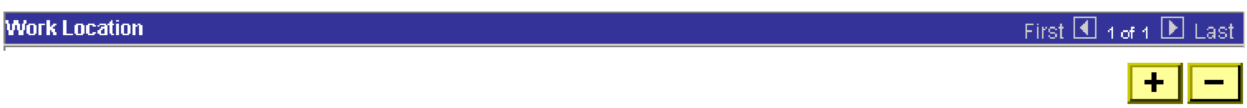
Job Data Pages

The system will display the employee's most current record.



Step I – Insert a New Row

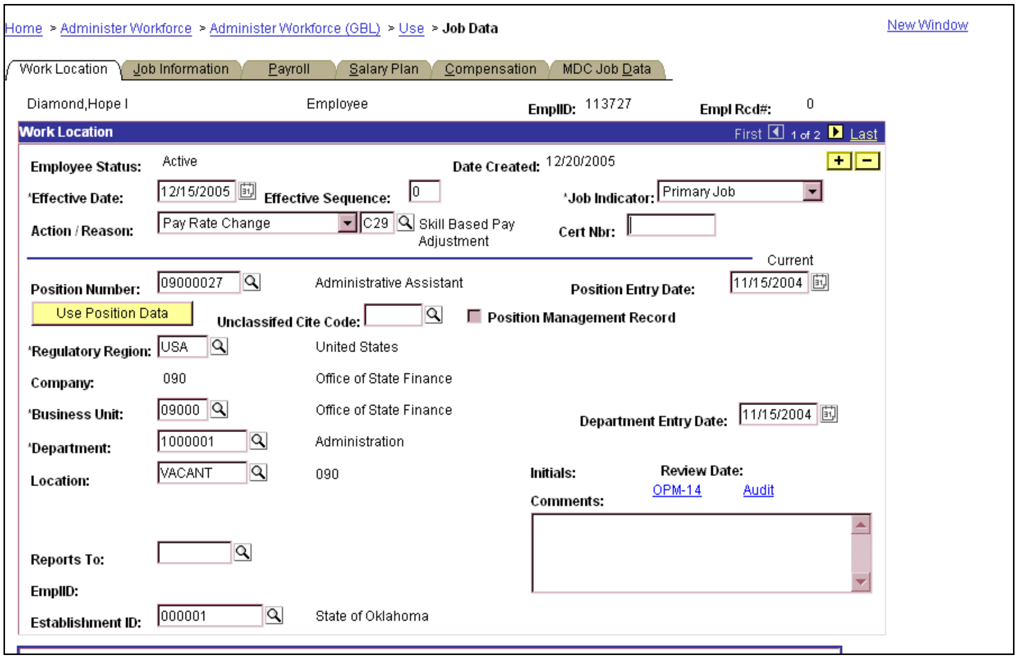
Click + located under the Work Location bar.



The system will make a copy of the existing job record and allow changes to be entered into the new effective-dated record.

STEP II – ENTERING PAY RATE CHANGES IN THE JOB DATA PAGES

WORK LOCATION PAGE



***Effective Date** – **Enter** the date the Pay Rate Change will take effect.

Action – **Select** the Pay Rate Change action.

Reason – **Select** the appropriate value from the Lookup.

COMPENSATION PAGE

CHANGING THE DOLLAR AMOUNT

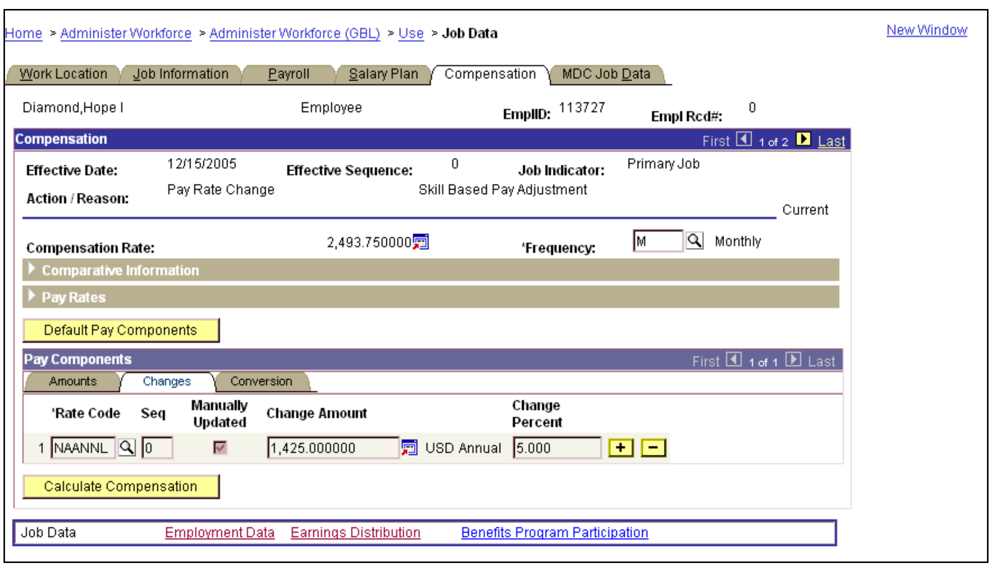
Comp Rate – Change the value to reflect the Pay Rate Change.

Click Calculate Compensation. The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates.

NOTE: You can click Calculate Compensation to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values; however, you cannot modify the employee's pay components without recalculating the compensation.

CHANGING BY PERCENT OF INCREASE

Click the Pay Components 'Changes' Tab.



Change Percent – **Enter** the percent of increase. Example = 5.0%

Click Calculate Compensation

The system will automatically update the daily, weekly, monthly, and annual pay calculations by the 5.0%.

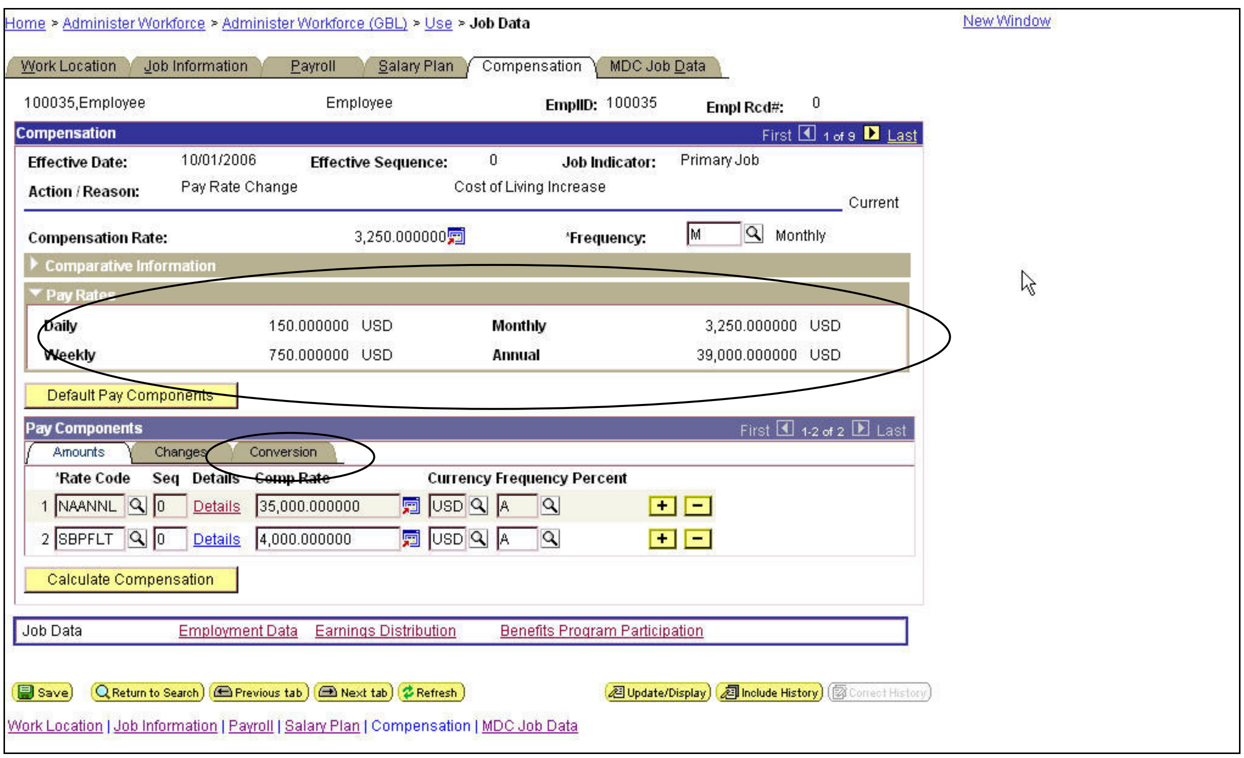
Click the Pay Rates dropdown arrow to view the calculations.

Select 

at the bottom of the page to save your changes.

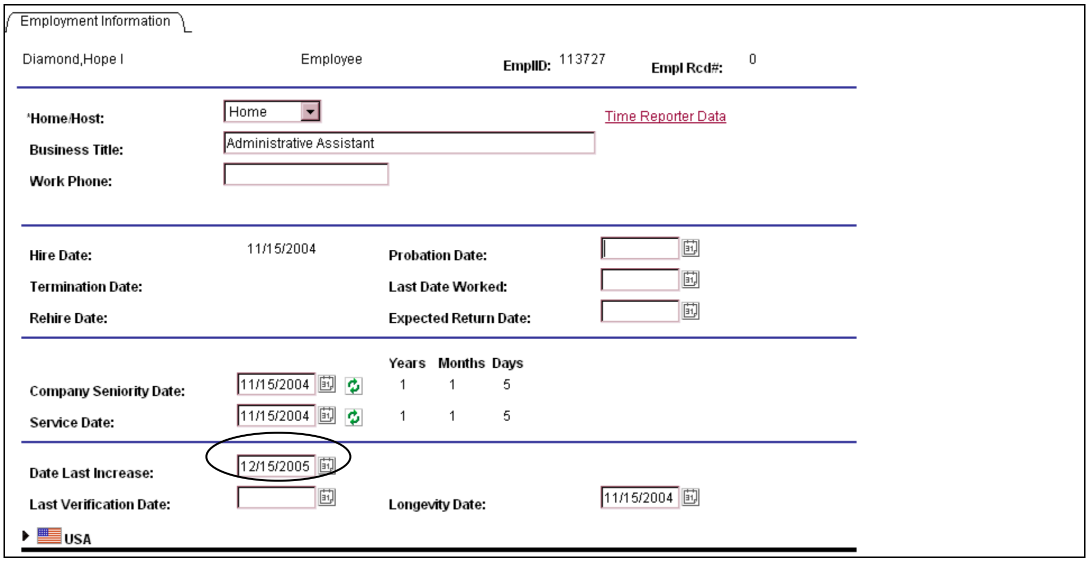
ADDITIONAL PAY ON COMPENSATION

Additional pay is entered on the Job Data Component under the Compensation page when an employee will receive additional pay that does not fluctuate during a pay period (either by percent or flat-amount. Example: Skill-based pay.



NOTE: The additional pay amount will be added to the total annual or monthly pay when you view the Pay Rates comparison information. Look under the Conversion tab to see the actual monthly amounts.

EMPLOYMENT INFORMATION: DATE LAST INCREASE


Employment Information

Diamond,Hope I | Employee | EmplID: 113727 | Empl Rcd#: 0

*Home/Host: Home | Time Reporter Data

Business Title: Administrative Assistant

Work Phone:

Hire Date: 11/15/2004 | Probation Date:

Termination Date: | Last Date Worked:

Rehire Date: | Expected Return Date:

		Years	Months	Days
Company Seniority Date:	11/15/2004	1	1	5
Service Date:	11/15/2004	1	1	5

Date Last Increase: 12/15/2005

Last Verification Date: | Longevity Date: 11/15/2004

USA

After saving your information, the system will automatically update the 'Date Last Increase' field on the employee's record.

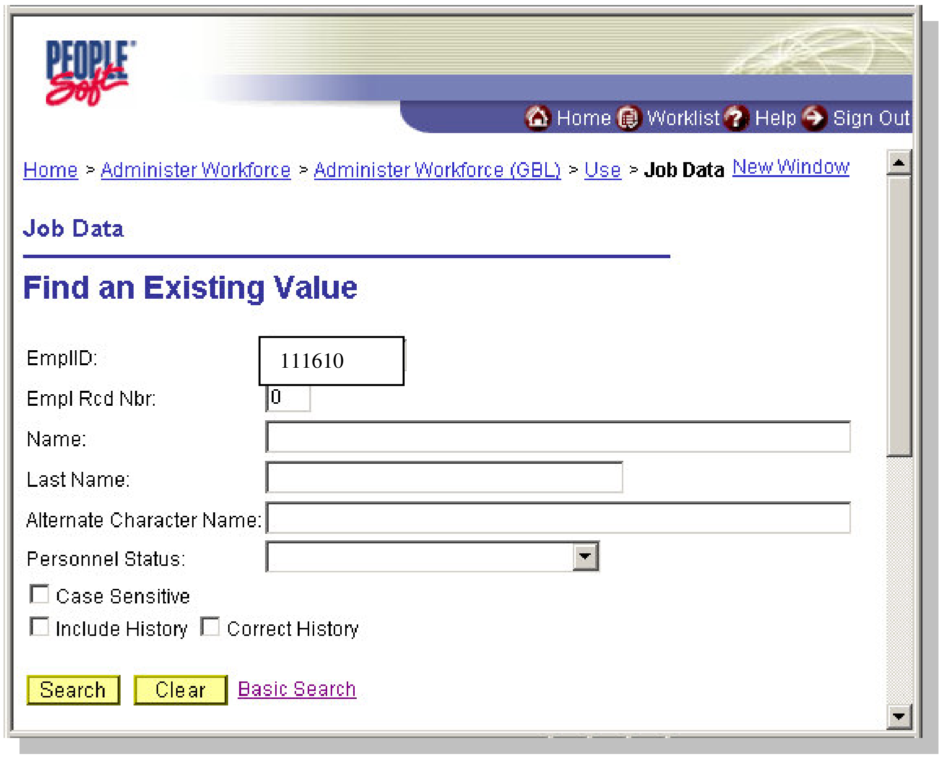
NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB AND POSITION DATA - DETAIL TO SPECIAL DUTY – NEW!!!

New recommended Detail to Special Duty process

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*

The system will display the following search window:



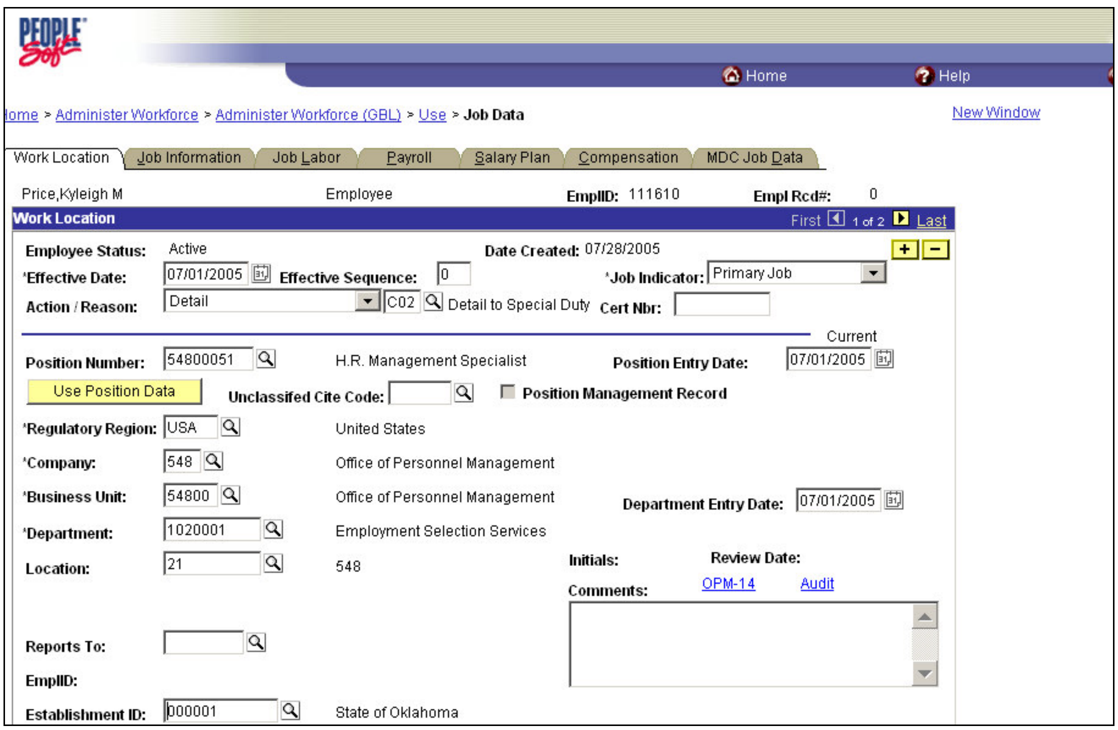
Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above. If you search by last name and the name is common, you will have to scroll through the list.

STEP I – INSERT NEW ROW

Click located under the Work Location bar.

The system will make a copy of the existing record and allow changes to be entered into the new record.

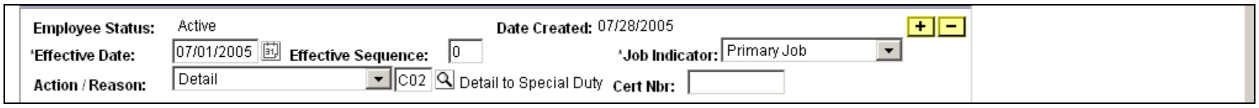
STEP II – ENTER THE DETAIL/TEMP ASSIGNMENT INFORMATION



***Effective Date** – **Enter** the first day that the employee will be paid *in the detail/temp assignment job.*

***Job Indicator –** Core benefits are paid from the Primary job.

Action – **Enter** ‘Detail’



Reason – **Select** ‘C02’ if the employee will occupy a Classified Position, ‘A14’ if the employee will occupy an Unclassified Position.

Position Number – **Enter** the Detail/Temp Assignment position number and tab out of the field. The associated fields will automatically update.

Establishment ID – Update the Establishment ID field on Work Location; this is a required field; it will clear when the new Position Number is entered.

Work Location Page – Review all values on Work Location page.

Job Information Page – Review all values on Job Information page.

Override Position Data Button – If required, **click** Override Position Data on Work Location page to open the fields on Work Location or Job Information for updating.

Payroll Page – Review all values on Payroll page and update as necessary.

Salary Plan Page – The values on the Salary Plan page will default from the Job Code on Job Information page.

Compensation Page – Update the Compensation page with new compensation if appropriate ***(remember to click*** Calculate Compensation ***to recalculate any new compensation for the employee).***

Update any of the remaining pages, to include MDC Job Data, Employment Data, and Earnings Distribution. There should be no need to update Benefit Program Participation page.

Click Save at the bottom of the page to save your changes.

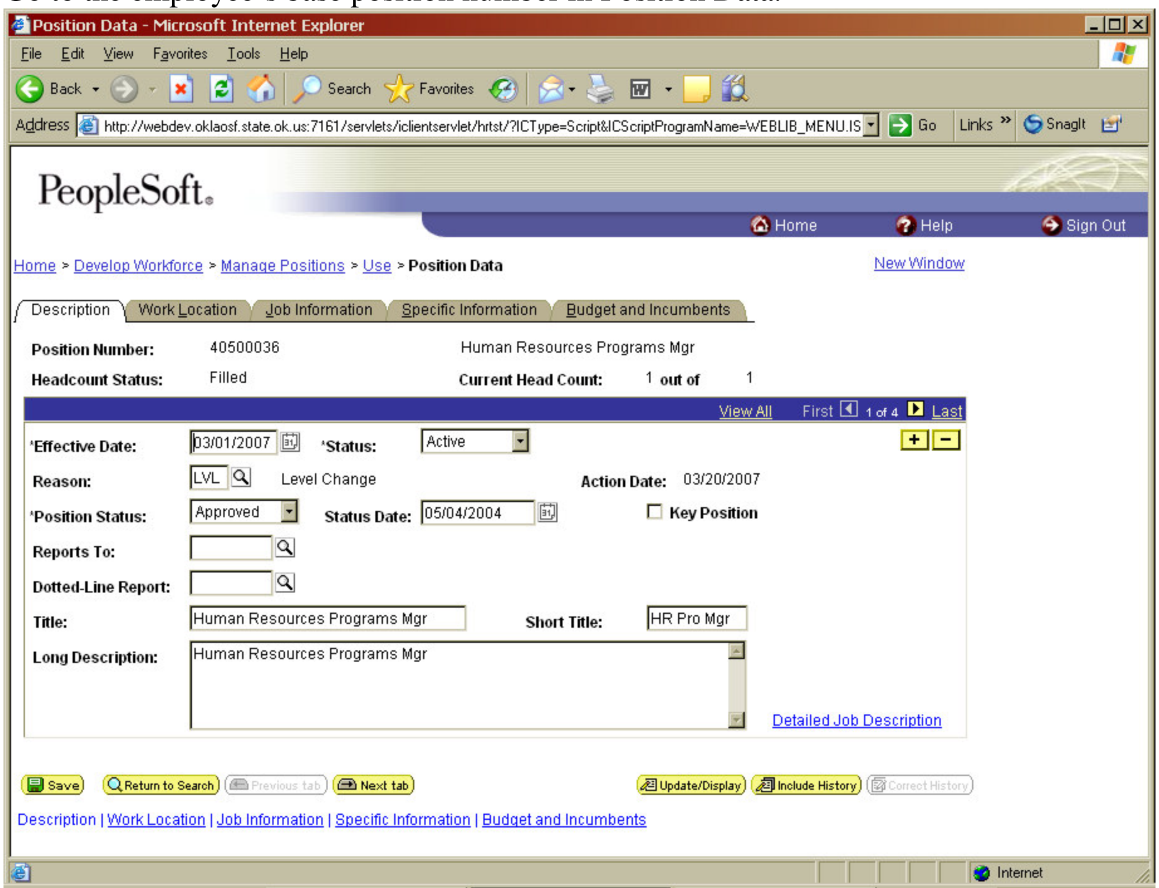
STEP III – UPDATE BASE POSITION, POSITION DATA RECORD

Step III is an optional step; it is not required.

Update the employee's base Position on Position Data to prevent its use by another employee.

Navigation: *Develop Workforce > Manage Positions > Use > Position Data*

Go to the employee's base position number in Position Data.

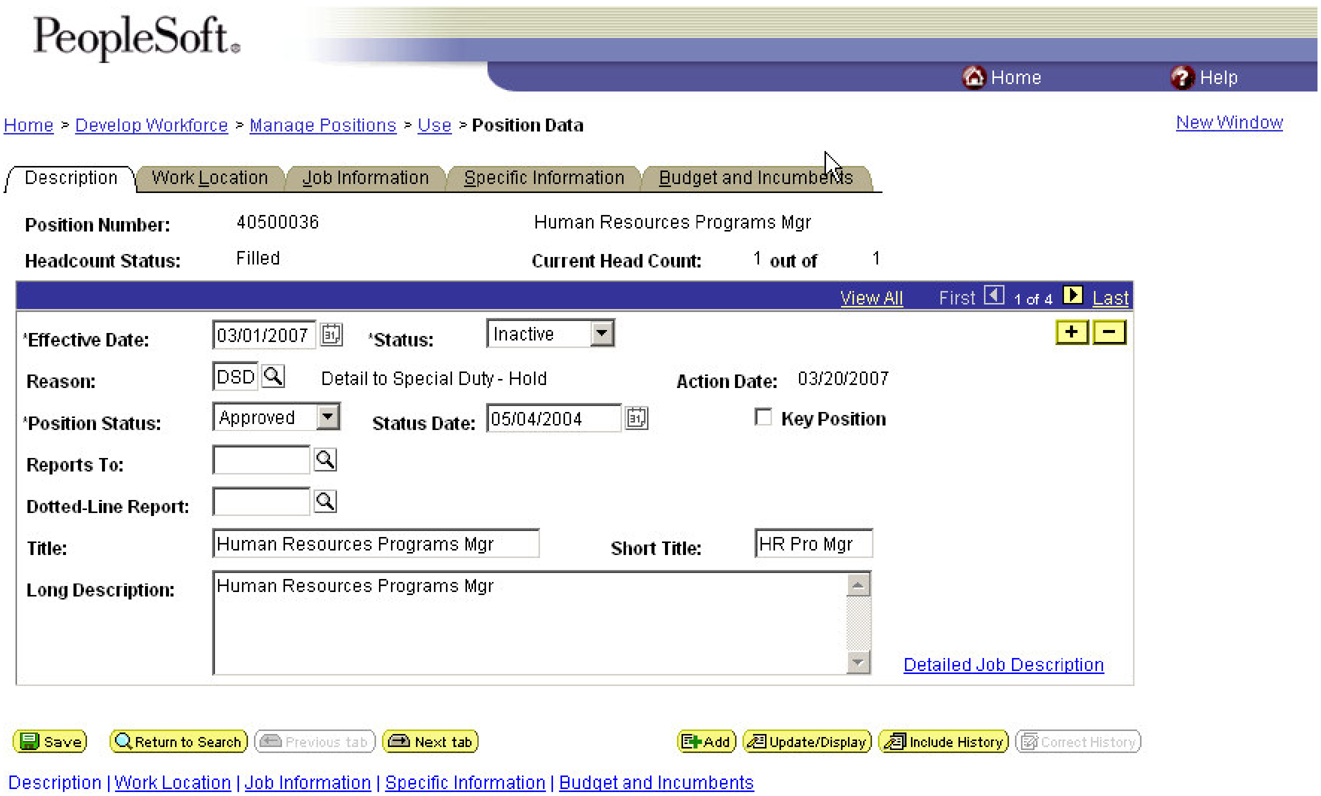


Effective Date – Insert a new effective dated row to equal the employee's Detail to Special Duty effective date on Job Data (i.e., employee's Effective Date is 5/1/07; the effective date on the new Position row is 5/1/07).

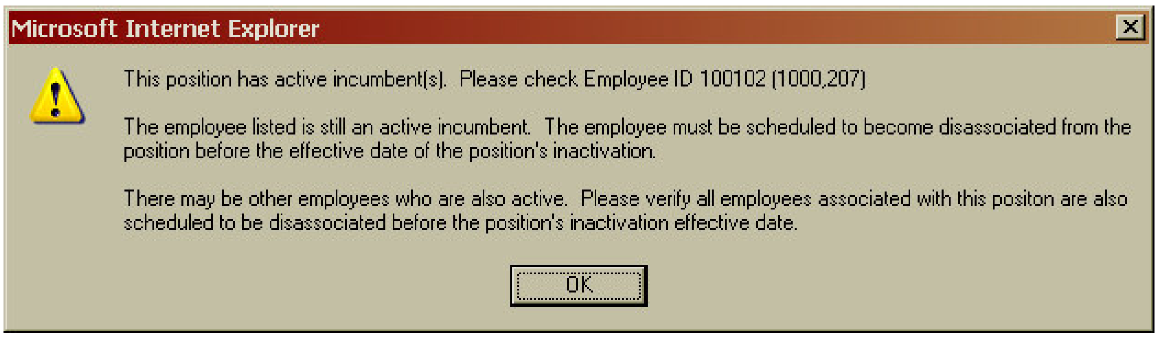
Status – Change the position status from 'Active' to 'Inactive'. The position will no longer be available for selection, nor will it show up on any Active Positions reports or queries. (If you intend to backfill the position, do not change the position status to Inactive.)

Reason – Use the Reason of DSD - Detail to Special Duty – Hold.

Click Save at the bottom of the page to save your changes.



NOTE: if you do the steps out of order (<u>Position Data before Job Data</u>), you will receive the following Save Edit stop message that prevents the Position update from saving:



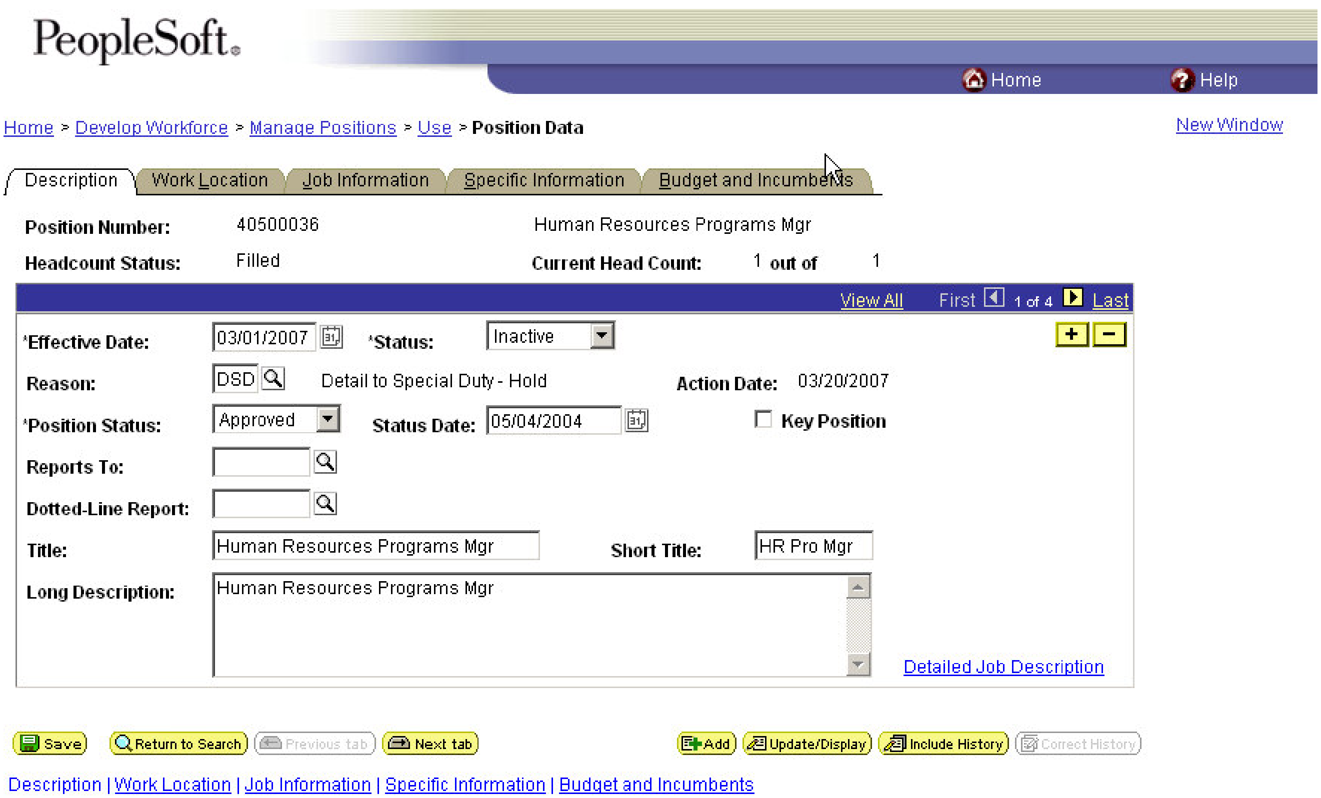
JOB AND POSITION DATA - END DETAIL TO SPECIAL DUTY

STEP I – UPDATE BASE POSITION, POSITION DATA RECORD

Update the Position Data record when the employee is ready to go back to the base position. This step must be done first in order to **select** the base Position Number from the drop down listing on Job Data/Work Location. ***Do this ONLY if you Inactivated the base Position Number***.

Navigation: *Develop Workforce > Manage Positions > Use > Position Data*

Go to the employee's base position number in Position Data.



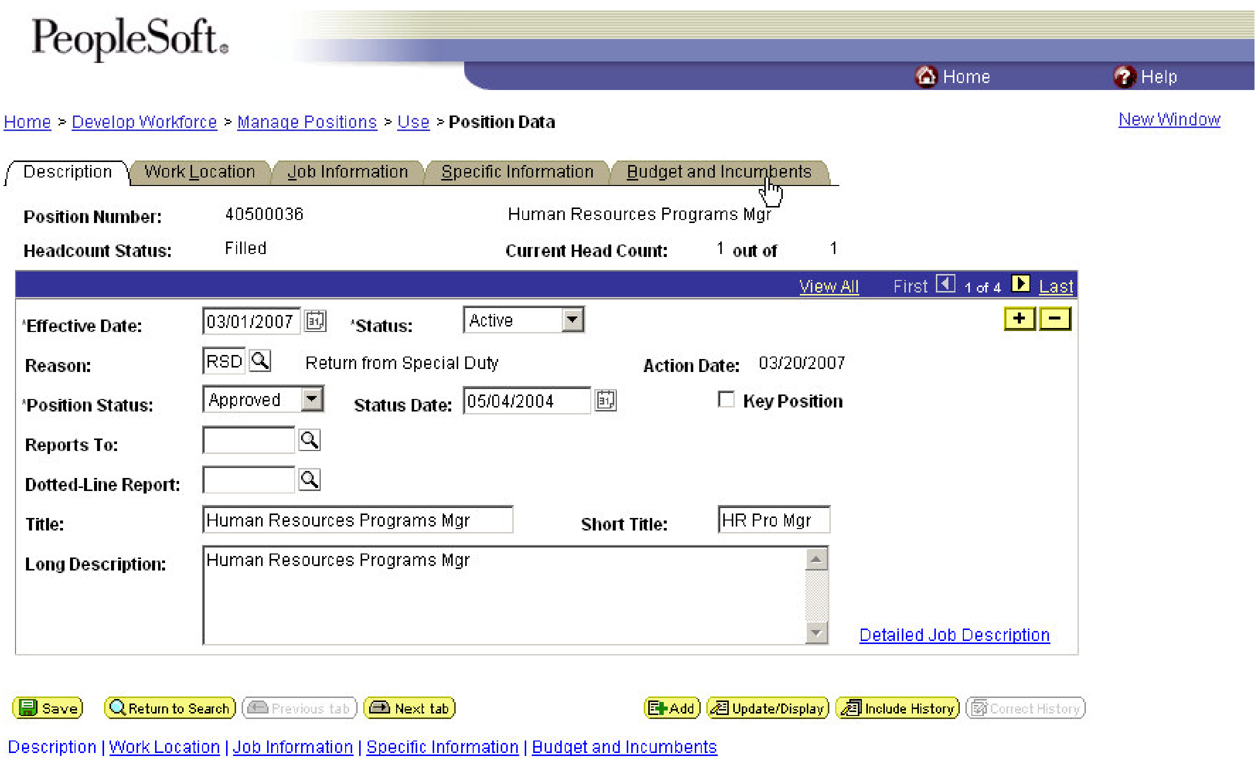
Effective Date – Insert a new effective dated row to equal what will be the employee's End of Detail to Special Duty effective date on Job Data (i.e., employee's Effective Date is 6/1/07; the effective date on the new Position row is 6/1/07).

Status – Change the position status from 'Inactive' to 'Active.' The position will now be available for **select**ion on the Job Data/Work Location page.

Reason – Use the Reason of RSD – Return from Special Duty.

Click 

at the bottom of the page to save your changes.

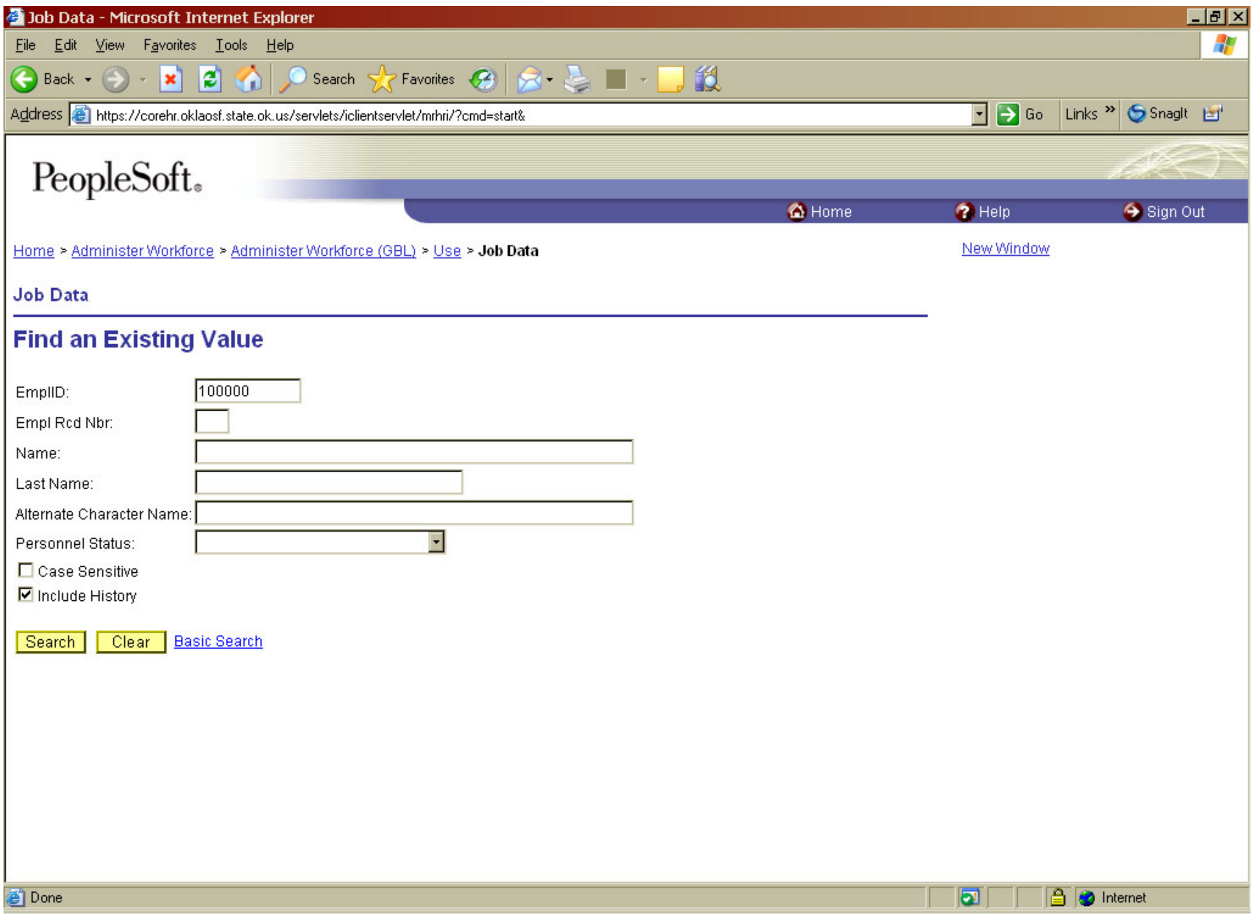


STEP II – UPDATE JOB DATA

Update the employee's Job Data record to End the Detail to Special Duty

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*

The system will display the following search window:



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above.

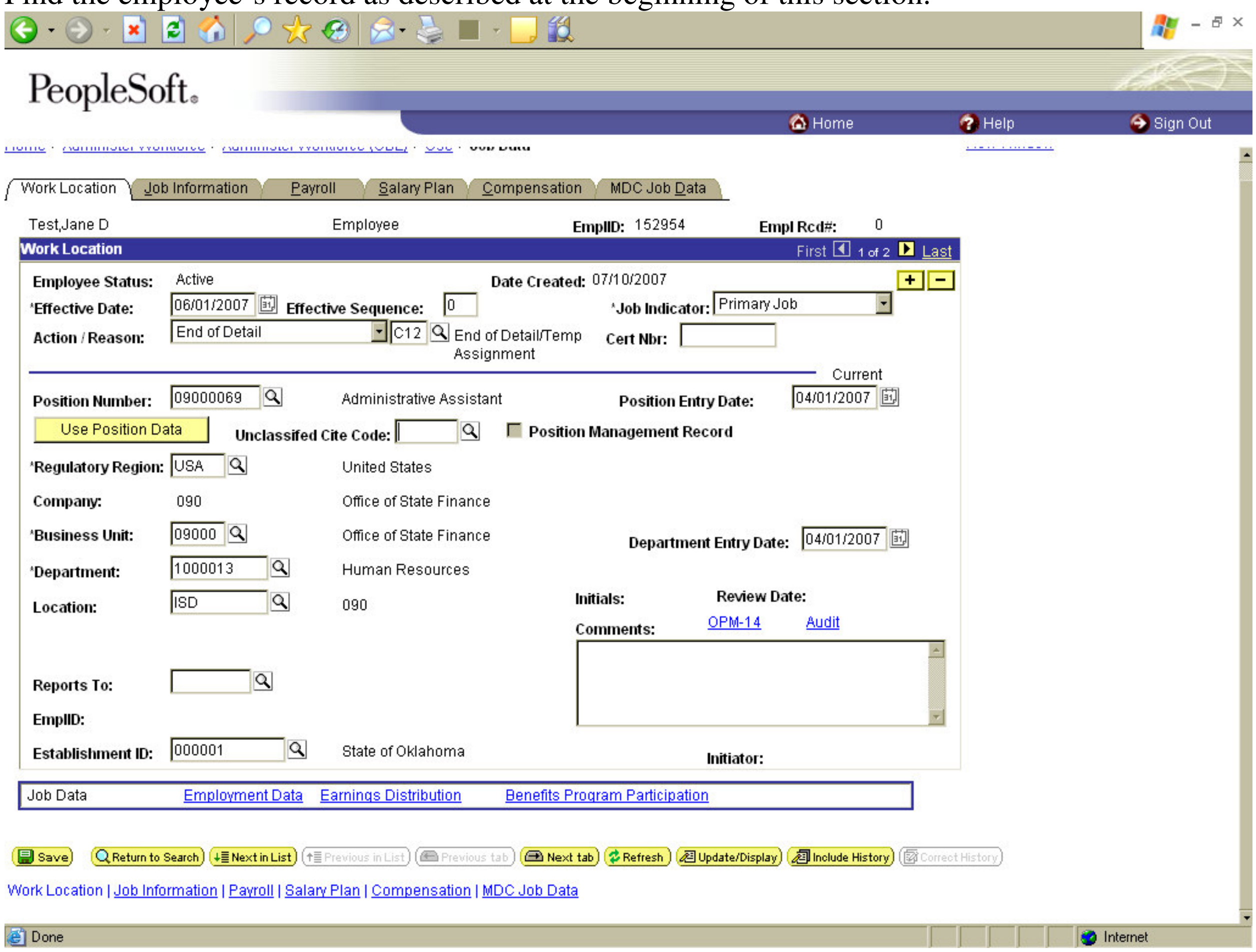
STEP III – INSERT NEW ROW

Click + located under the Work Location bar.

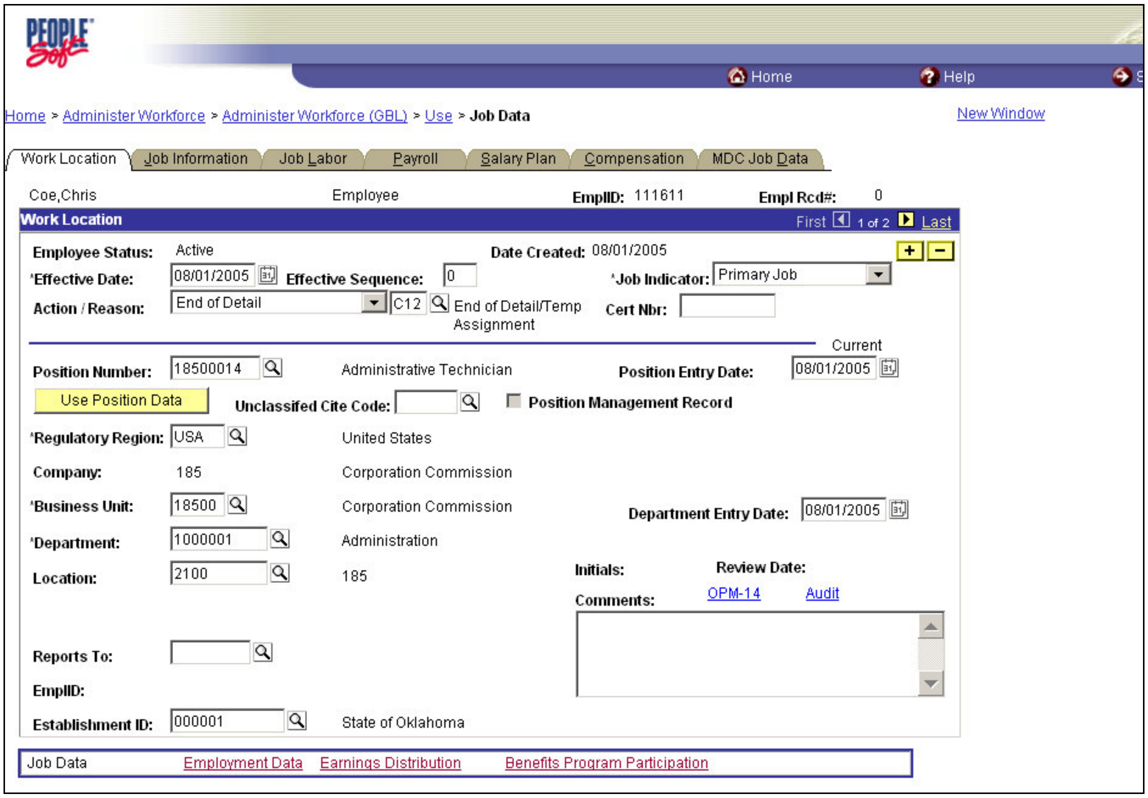
The system will make a copy of the existing record and allow changes to be entered into the new record.

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*

Find the employee's record as described at the beginning of this section.



STEP IV – ENTER THE END OF DETAIL INFORMATION



***Effective Date** – **Enter** the first day back in the base position.

***Job Indicator** – The base job must be the Primary Job for benefits to be paid.

Action – **Enter** 'End of Detail'

Reason – 'C12' (End of Detail/Temp Assignment)

Position Number – Return the employee to the base Position Number and tab. This brings in the default information from the Position Data record. (**Note: you may have to scroll back one or more rows to the row just prior to the latest Detail to Special Duty assignment to retrieve the base Position Number.)**

Establishment ID – Update the Establishment ID field on Work Location; this is a required field; it will clear when the new Position Number is entered.

Work Location Page – Review all values on Work Location page.

Job Information Page – Review all values on Job Information page.

Override Position Data – If required, **click** Override Position Data on Work Location page to open the fields on Work Location or Job Information for updating.

Payroll Page – Review all values on Payroll page and update as necessary.

Salary Plan Page – The values on the Salary Plan page will default from the Job Code on Job Information page.

Compensation Page – Update the Compensation page with new compensation if appropriate ***(remember to click*** Calculate Compensation ***to recalculate any new compensation for the employee).***

Update any of the remaining pages, to include MDC Job Data, Employment Data, and Earnings Distribution. There should be no need to update Benefit Program Participation page.

Click Save at the bottom of the page to save your changes.

The Base Position number on Position Data shows the employee as the Incumbent.

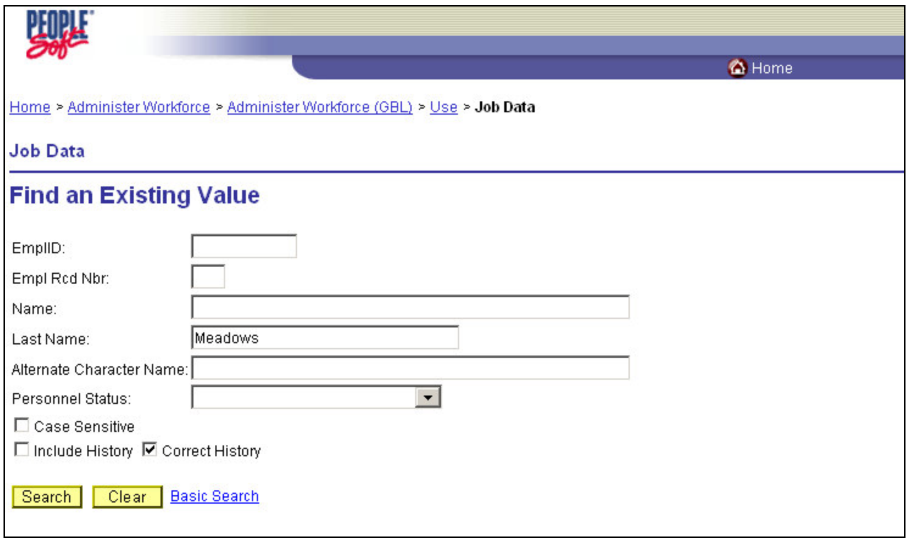
NOTE: if the base Position Number is not available for selection or you enter the number and tab and receive a red stop in the field, go to Position Data and follow the steps in Step I above. The Position status must be 'Active' to be available to use on the employee's Job Data record.

JOB DATA – LEAVE

Action	Reason (Transaction/Code)
Leave of Absence	C02 Detail to Special Duty
	L01 Leave Without Pay
	L02 Sick Leave Without Pay
	L03 Extension of Leave Without Pay
	L05 Military Leave Without Pay
	L07 Educational Leave Without Pay
	L09 LWOP Extension (Disability)
	L10 Furlough LWOP
Data Change	L12 Supplemented Workers Comp Leave
	L13 Supplemented LWOP(not WC)
	L14 Return to Regular Duty
	L23 Suspensions-Partial Pay <8 hrs.
Paid Leave of Absence	L03 Extension of Leave With Pay
	L04 Military Leave With Pay
	L06 Educational leave With Pay
	L20 Suspension With Pay
	MLP Military Leave Partial Pay
Suspension	L21 Suspension Without Pay

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*


Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data

Job Data

Find an Existing Value

EmplID:

Empl Rcd Nbr:

Name:

Last Name: Meadows

Alternate Character Name:

Personnel Status:

Case Sensitive

Include History Correct History

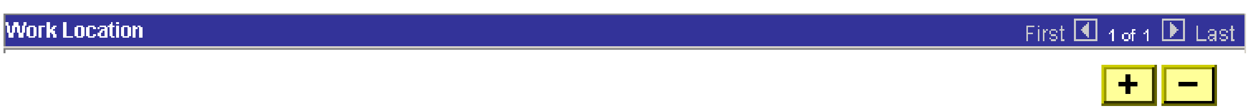
Search Clear Basic Search

Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . Last Name is shown above.

Leave Without Pay Scenario: *Employee Sky Meadows is going on leave without pay. She is expected to work through Friday, May 28, 2004. She will return to work on June 28, 2004.*

STEP I – INSERT NEW ROW

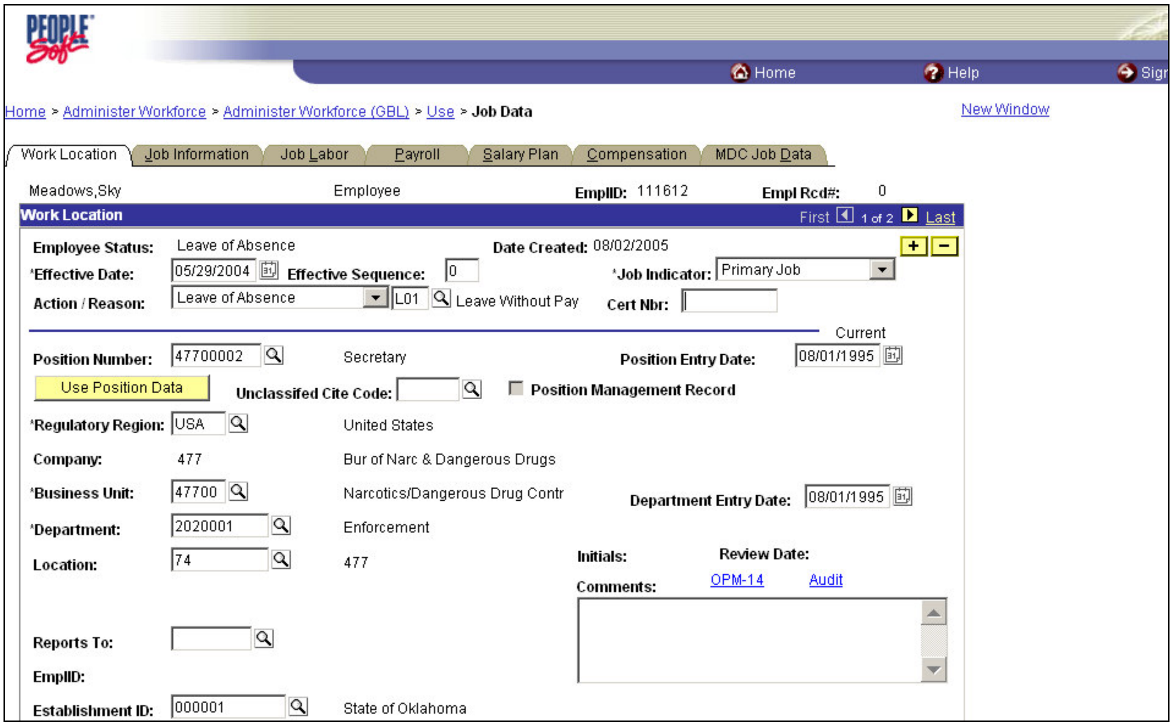
Click + located under the Work Location bar.



The system will make a copy of the existing record and allow changes to be entered into the new record.

STEP II – ENTER THE LEAVE INFORMATION

WORK LOCATION PAGE



***Effective Date** – **Enter** the first day that the employee will NOT be paid. In this example, Sky Meadows will be working through Friday, May 28, 2004. Therefore we will **enter** May 29, 2004.

Action – **Enter** 'Leave of Absence'

NOTE: When you selected the action 'Leave of Absence' the Employee Status changed from 'Active' to 'Leave of Absence'.

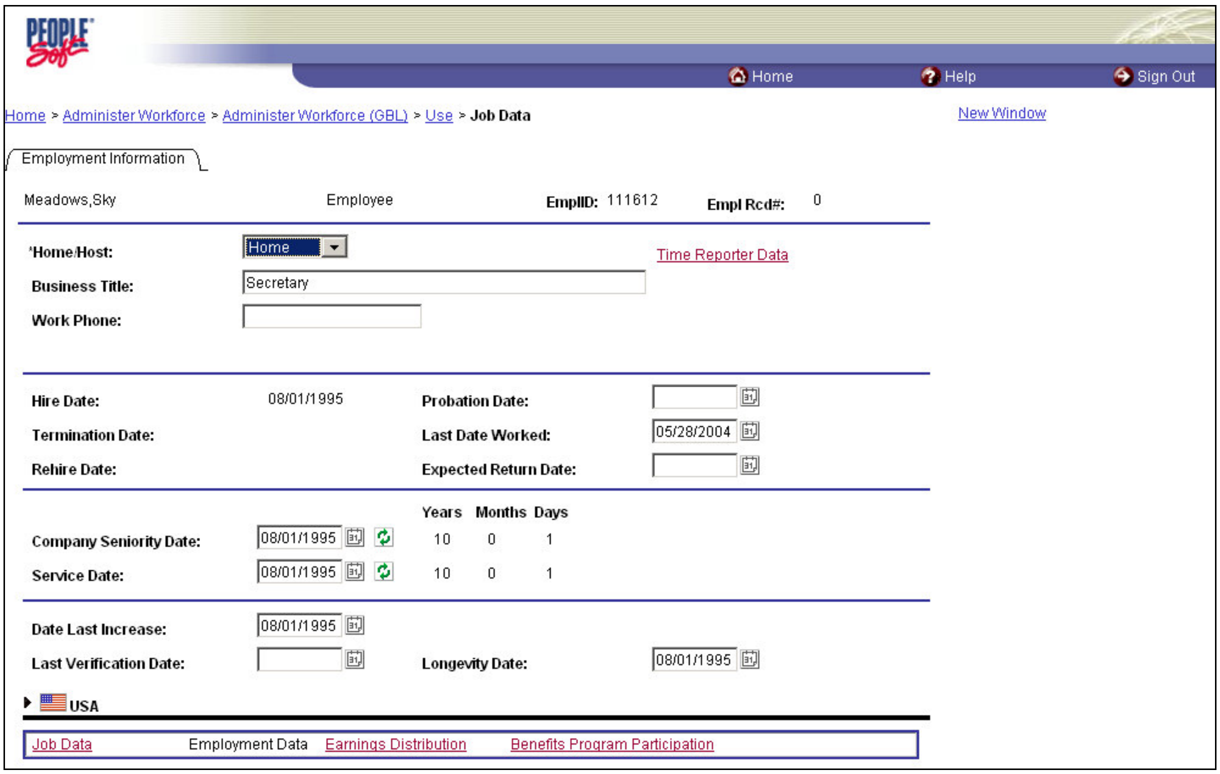
Reason – For our example, **enter** 'L01' = Leave Without Pay

Click 

at the bottom of the page to save your changes.

NOTE: After saving, the system will automatically fill in the 'Last Date Worked' field on the Employment Data page. This date should reflect the last day the employee will receive compensation for working. Our example: 05/28/2004

EMPLOYMENT DATA PAGE



NOTE: When you select a Leave Reason under Data Change (L12, L13, L14, or L23) or any Leave Reason under a Paid Leave of Absence, the employee remains in an 'Active' paid status.

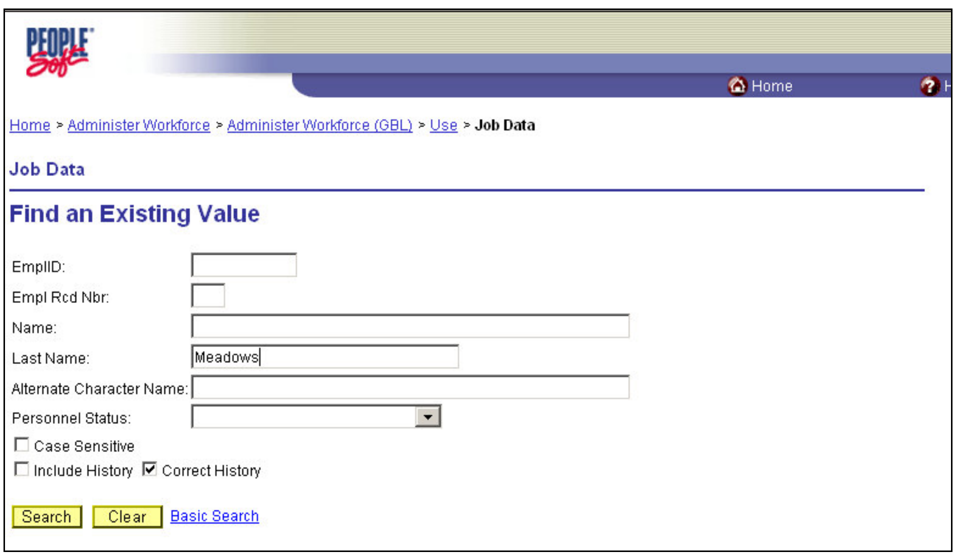
NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB DATA – RETURN FROM LEAVE

Action	Reason (Transaction/Code)
Return from Leave	C12 Expiration of Detail to Special Duty
	L08 Return Leave With/Without Pay
	L11 Return from Furlough
Data Change	L14 Return to Regular Duty
Recall from Suspension/Layoff	L22 Return from Suspension

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*



Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . Last Name is shown above.

Return from Leave Scenario: *Sky Meadows has been on Leave Without Pay since May 29, 2004. It is now June 28, 2004 and she is ready to return to work.*

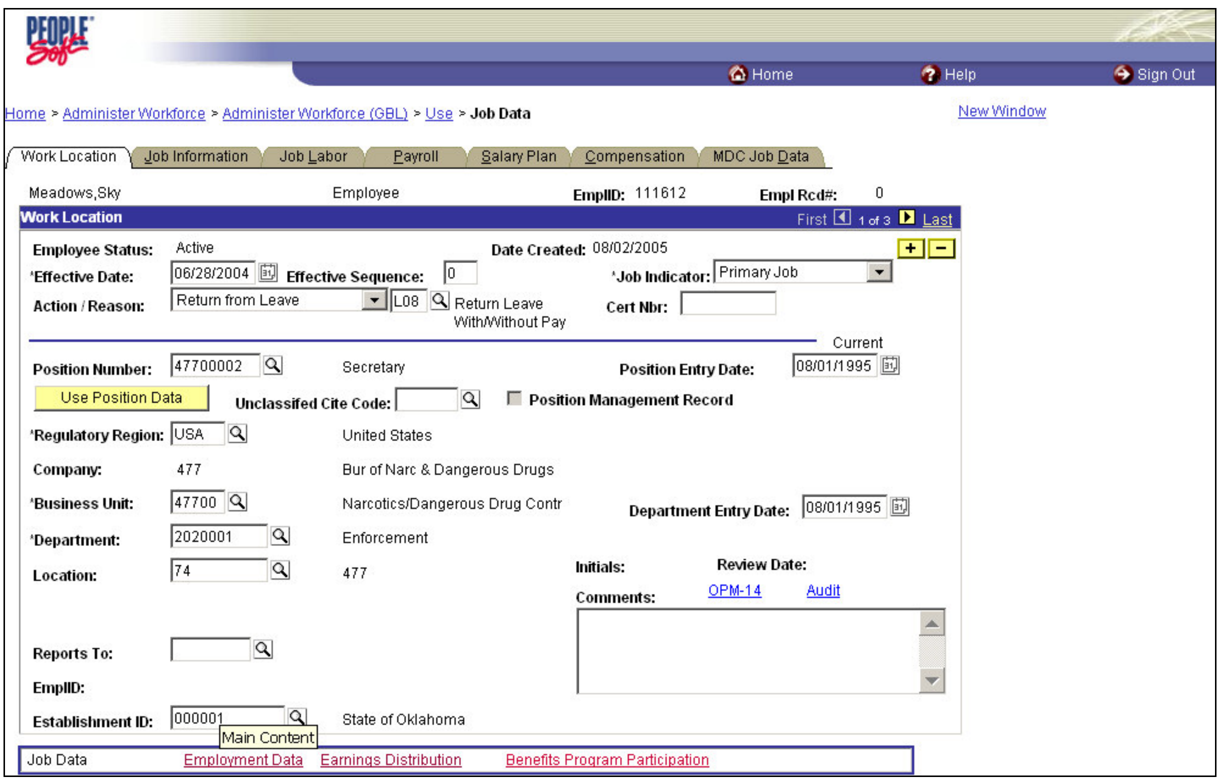
STEP I – INSERT NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing record and allow changes to be entered into the new record.

STEP II – ENTER THE RETURN INFORMATION

WORK LOCATION PAGE



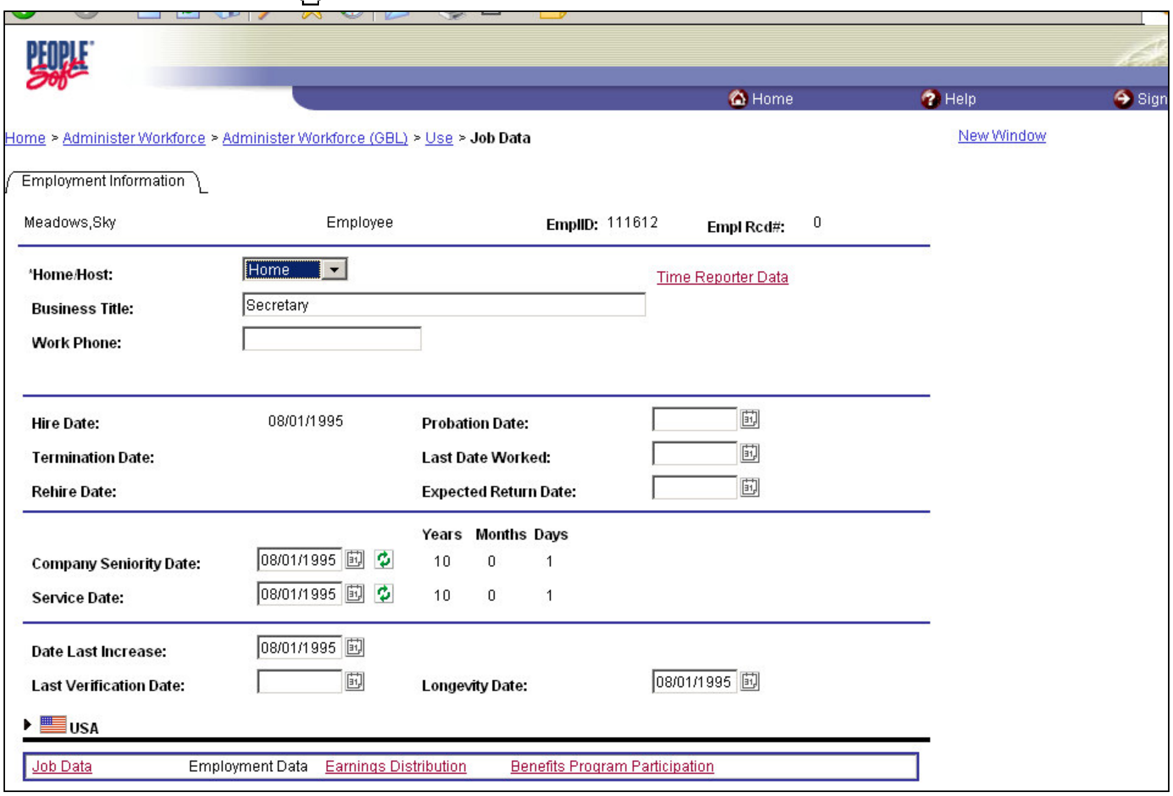
*__Effective Date – Enter__ the first day back to work. For our example we will **enter** June 28, 2004.

Action – Enter ‘Return from Leave’

Reason – For our example, **enter** ‘L08’ = Return Leave With/Without Pay. **Click** the Employment Data link.

NOTE: When you selected the action ‘Return from Leave’ the Employee Status changed to ‘Active’.

EMPLOYMENT DATA PAGE



Service Date – ***Verify that the Service Date is correct***. You can change this date as needed without being in Correct History. This date is used to determine your annual leave accrual level.

Longevity Date – Update if necessary. This is the date to begin tracking longevity service credit, moved forward by any breaks in service, or periods of Leave Without Pay, longer than 30 days.

Click 

at the bottom of the page to save your changes.

NOTE: After saving, the system will clear the 'Last Date Worked' field.

NOTE: If the employee is in a Leave Without Pay status, and if you select the Action/Reason of Data Change/L14, this DOES NOT return the employee from Leave Without Pay—the employee is still in an unpaid status. You have to use Return from Leave to return the employee to Active status.

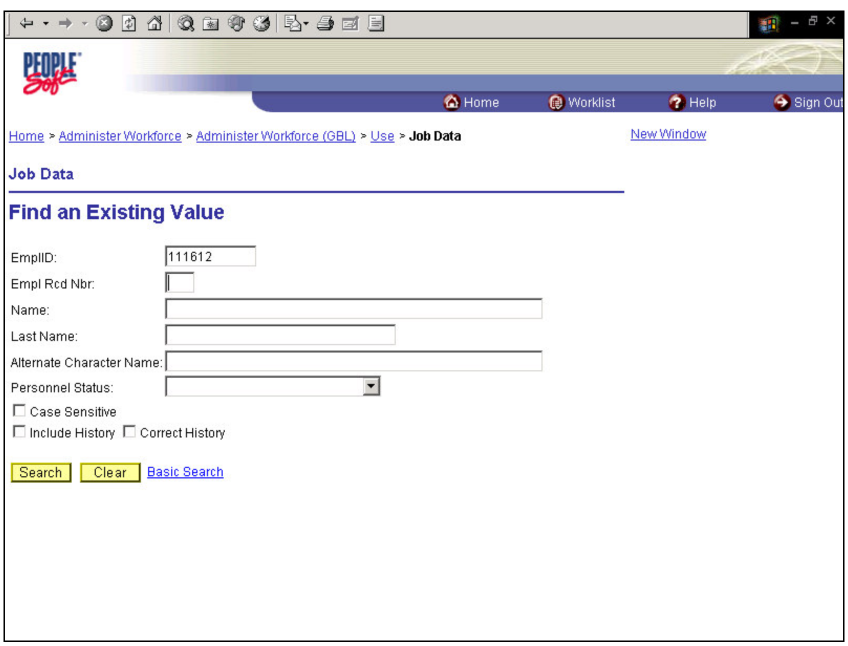
NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB DATA - TERMINATING AN EMPLOYEE

Action	Reason (Transaction/Code)
Retirement	S02 Retirement
Termination	C12 Expiration Detail to Special Duty
	S01 Resignation
	S03 Discharge
	S04 Deceased
	S05 Expiration of Unclassified Appointment
	S06 Transferred Out
	S07 Reduction in Force
	S10 Transfer to Non Merit Agency

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*



The search window will be displayed. **Enter** the employee's search criteria and **click** Search. Be certain to **select** the correct Job Record.

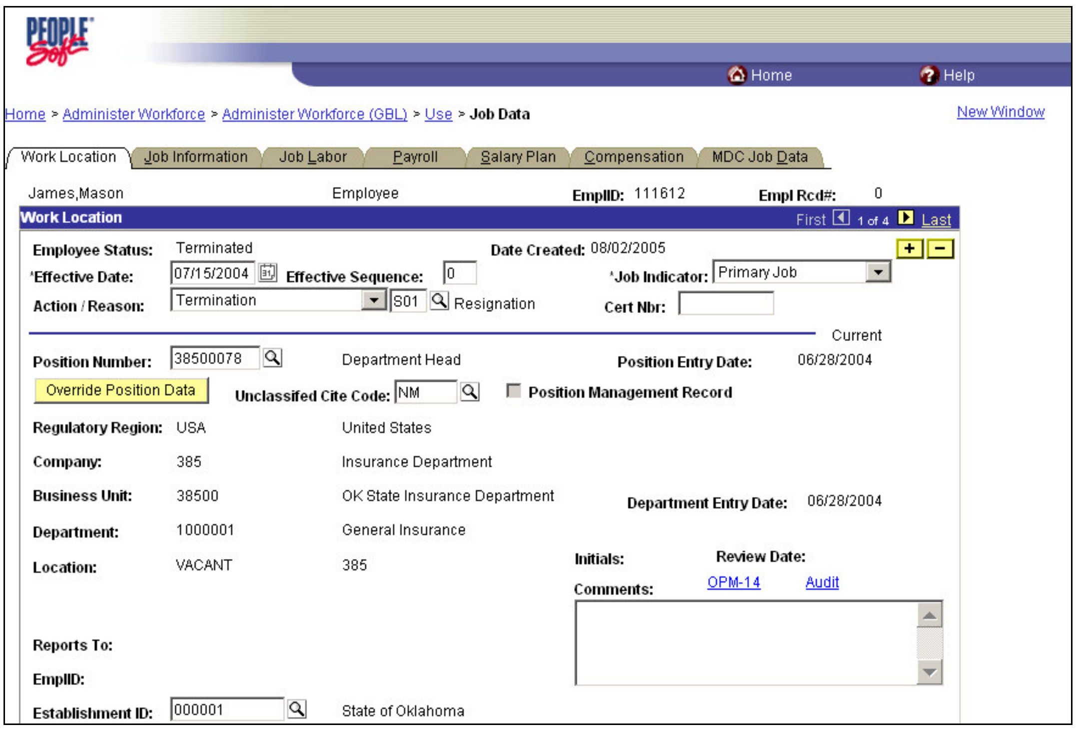
STEP I – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be entered into the new effective-dated record, as shown below.

STEP II – ENTERING TERMINATION INFORMATION

WORK LOCATION PAGE



***Effective Date** – This is the first day the employee is no longer paid.

For example, if the employee's last day of employment is April 30, set the effective date of termination or retirement as May 1. If the date is set at April 30, the employee would not be paid for the last day of work.

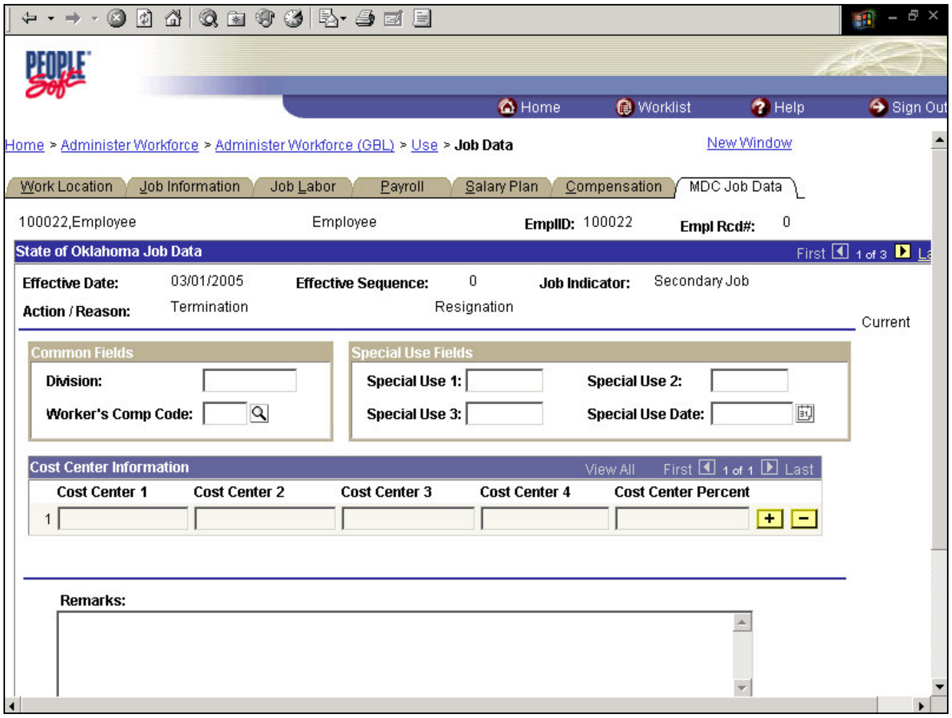
***Job Indicator –** Prior to terminating an employee, be certain you are viewing the correct job record.

Action – **Select** the appropriate value from the dropdown menu.

Reason – **Select** the appropriate value from the Lookup.

Cert Nbr – If populated, delete number.

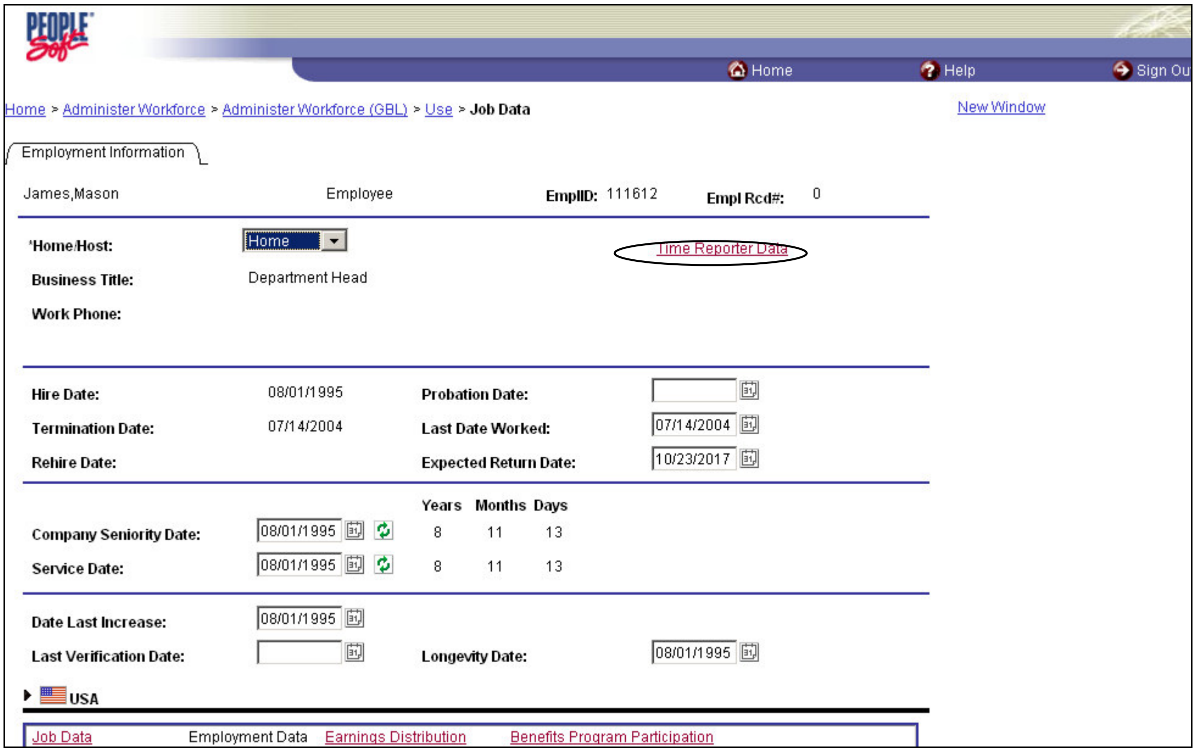
MDC JOB DATA PAGE



Remarks – When terminating a temporary employee, OPM requires that you **enter** the total hours worked in this section before they will approve the OPM transaction.

NOTE: If an employee's primary job is terminated and the employee has a secondary job, the Secondary job agency must be notified. That agency will need to change the Job Indicator on the Secondary job to 'Primary' by inserting a row and using the action of 'Data Change'. If the employee is eligible for benefits, the Benefits Program Participation should be reviewed. If the Job Indicator is not updated, a warning message will be displayed when any subsequent transaction is saved.

EMPLOYMENT DATA PAGE



Expected Return Date – Enter the Reinstatement Eligibility Date. OPM will provide a spreadsheet with formulas that will calculate the Reinstatement Eligibility Date.

After saving the termination, the 'Last Day Worked' field on the 'Employment Data' page will automatically be updated.

NOTE: DO NOT INACTIVATE THE TIME REPORTER DATA PAGE – EVER!

No updates to the Benefits Component are required when terminating a temporary employee.

NOTE: General Deductions and Benefits must be terminated to prevent "catch-up" deductions if the employee is rehired.

JOB DATA – TERMINATING DECEASED EMPLOYEES

STEP I – UPDATE PERSONAL DATA PAGES

Additional Information required for terminating deceased employees

Navigate to the Personal Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Personal Data*

IDENTITY/DIVERSITY PAGE

Date of Death – Enter date of death.

Select 

at the bottom of the page to save your changes.

NOTE: It is not necessary to add a row to update this information

STEP II – UPDATE JOB DATA PAGES

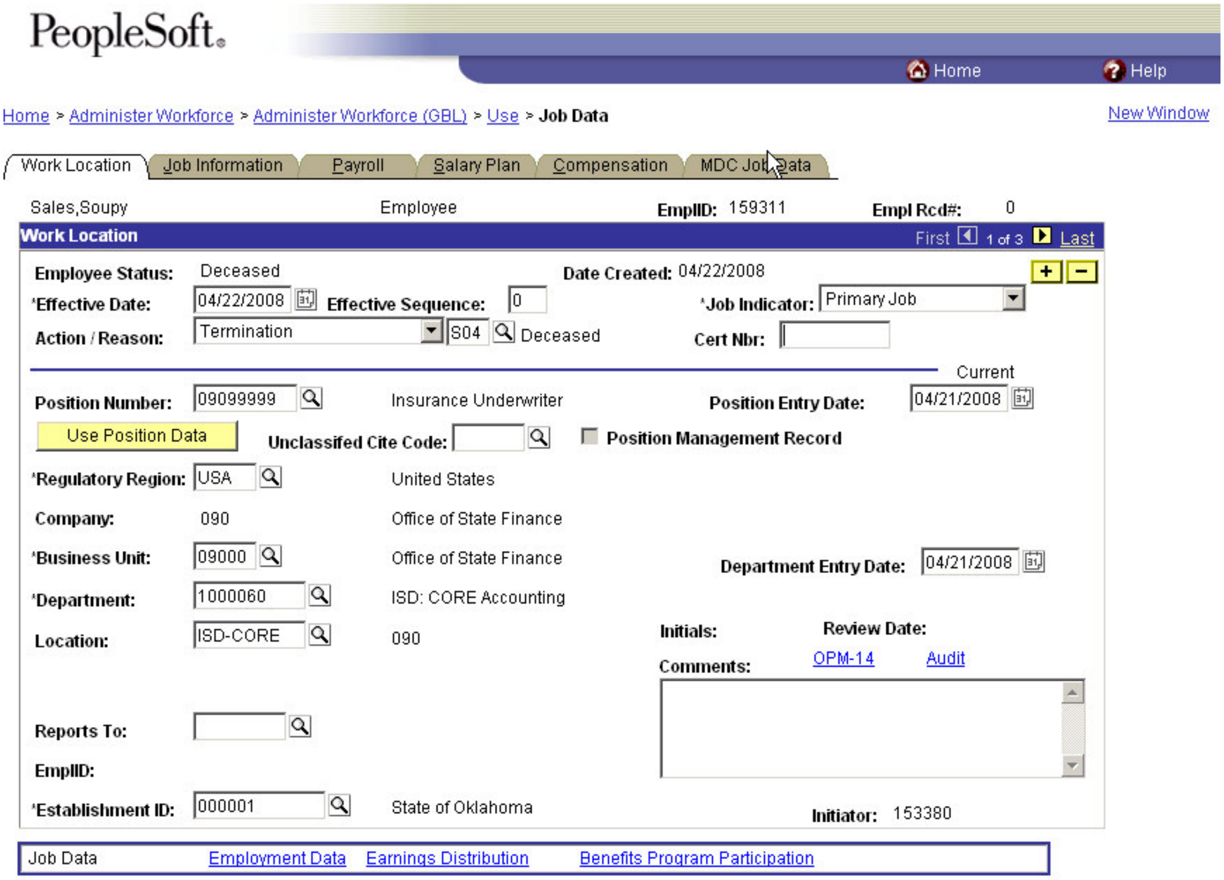
STEP III – INSERT A NEW ROW

Click + located under the Work Location bar.

The system will make a copy of the existing job record and allow changes to be **enter**ed into the new effective-dated record, as shown below.

STEP IV – ENTERING TERMINATION INFORMATION

WORK LOCATION PAGE



*__Effective Date__ – This is the first day the employee is no longer paid.

For example, if the employee's last day of employment is April 30, set the effective date of termination or retirement as May 1. If the date is set at April 30, the employee would not be paid for the last day of work.

*__Job Indicator –__ Prior to terminating an employee, be certain you are viewing the correct job record.

Action – **Select** the appropriate value from the dropdown menu.

Reason – **Select** the appropriate value from the Lookup. (For Deceased employees, this is S04.)

Cert Nbr – If populated, delete

JOB DATA - TRANSFER AN EMPLOYEE TO ANOTHER AGENCY

Action (Completed By)	Reason (Transaction/Code)
Termination (Sending Agency)	S06 Transferred Out
Data Change (OPM)	OPM OPM Interagency Activity
Rehire (Receiving Agency)	A04 Transfer / Promotion
	A05 Transfer / Demotion InterAgency
	A06 InterAgency Lateral New JFD
	A07 Transfer Class to Same Class

STEP I – TERMINATE EMPLOYEE

The employee's current Agency enters the termination of the employee. Follow the steps listed in "Terminate an Employee".

STEP II – OPM INITIATES REHIRE TRANSACTION

The receiving agency will email to OPM the effective date, the employee's name and Social Security number, a valid position number, the job code, the authority cite (if position is unclassified), and the appropriate Pay Group. OPM will insert a Job Data row with a 'Data Change' action and 'OPM Interagency Activity' reason, **enter** the new effective date, position number, and pay group, save, and notify the receiving Agency that the employee's record can be accessed.

NOTE: When OPM has posted the transfer row, if you need a copy of the final OPM-14, request the printed form from OPM. OPM will not update any other information on the employee's record – the updates are done by the rehiring agency as part of the Rehire process.

STEP III – REHIRE EMPLOYEE

The receiving Agency completes the rehire of the employee. Follow the steps listed in "Rehire", being certain to increase the Effective Sequence by 1. Remember to update the employee's Rehire row on Job Data to reflect the receiving Agency's information on all pages; this includes Earnings Distribution, MDC Job Data, Employment Data, Time Reporter, etc.

Do not use the 'Hire' process when rehiring a former employee. The 'Hire' process will overwrite the original Hire Date, but the 'Rehire' process will not.

NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

JOB DATA - FUNDING SOURCE CHANGES

Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*

Funding Source Change Scenario: Kyleigh Price's current funding source is: 000000612 at 100%. As of June 15, 2005, the funding source allocation will change to: 000000014 at 50% and 000000016 at 50%.

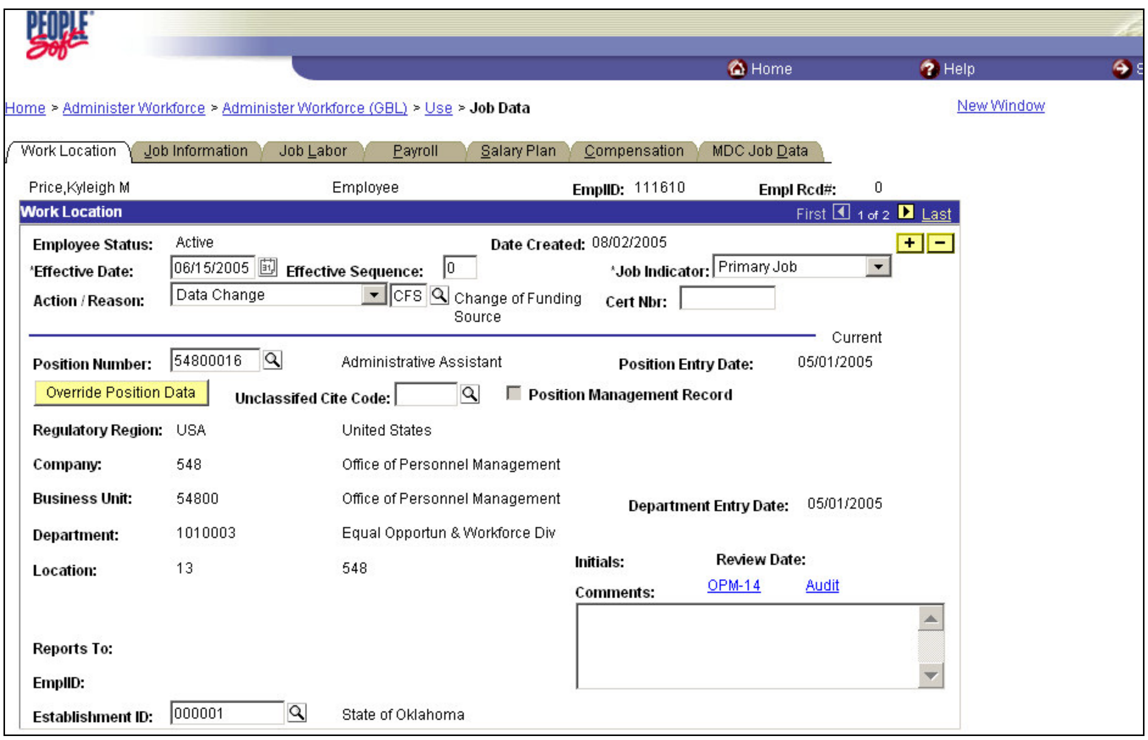
STEP I – INSERT NEW ROW

Click + located under the 'Work Location' bar.

The system will make a copy of the existing record and allow changes to be entered into the new record.

STEP II – ENTERING CHANGES

WORK LOCATION PAGE



*Effective Date – **Enter** the effective date of the change.

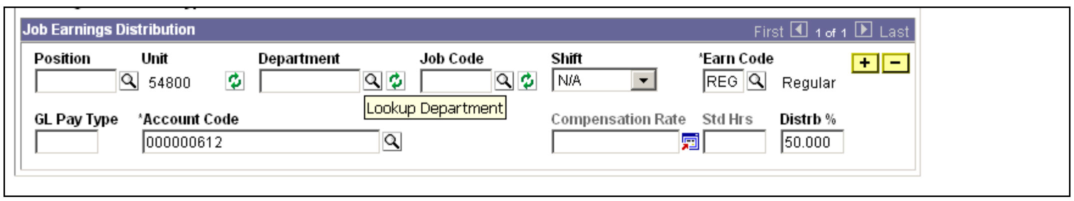
Action – Enter 'Data Change'

Reason – 'CFS' – Change of Funding Source.

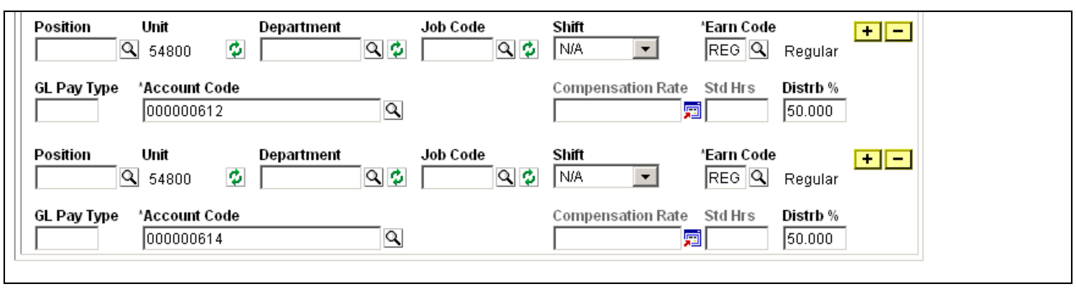
Click the Earnings Distribution link.

JOB EARNINGS DISTRIBUTION PAGE

Change the 100% for Account 000000612 to 50%. Then **click** to add an additional row, as shown below.



Enter the additional funding source information into the new row. Example: 000000614 @ 50%.



Select at the bottom of the page to save your changes.

NOTE: The employee record now indicates that there are two records: one current, one history. First 1 of 2 Last Click the 'Right Arrow' to view the history record that contains previous funding allocation information. Total allocation percentage must equal 100%.

NOTE: If the Change of Funding Source is for the entire pay period, the new row has to be inserted effective the beginning of the new pay period.

NOTE: Refer to the Payroll [P105] and Benefits [P104] manuals for additional updates that may be required to accurately complete this transaction.

REHIRE AN EMPLOYEE

PEOPLESOFT PROTECTS THE SECURITY AND INTEGRITY OF EACH AGENCY'S DATA. ONLY THE OFFICE OF PERSONNEL MANAGEMENT HAS ACCESS TO INFORMATION FOR ALL AGENCIES; THEREFORE, AGENCIES MAY COMPLETE THE REHIRE TRANSACTION ONLY IF THE PERSON PREVIOUSLY WORKED FOR THAT SAME AGENCY AND HAS NOT WORKED FOR ANOTHER AGENCY IN THE INTERIM. IF THE PERSON'S MOST RECENT STATE EMPLOYMENT WAS WITH A DIFFERENT AGENCY, THE OFFICE OF PERSONNEL MANAGEMENT MUST INITIATE THE REHIRE TRANSACTION.

THE RECEIVING AGENCY WILL EMAIL TO OPM THE EFFECTIVE DATE, THE EMPLOYEE'S NAME AND SOCIAL SECURITY NUMBER, A VALID POSITION NUMBER, THE JOB CODE, THE AUTHORITY CITE (IF POSITION IS UNCLASSIFIED), AND THE APPROPRIATE PAY GROUP. OPM WILL INSERT A JOB DATA ROW WITH A 'DATA CHANGE' ACTION AND 'OPM INTERAGENCY ACTIVITY' REASON, ENTER THE NEW EFFECTIVE DATE, POSITION NUMBER, AND PAY GROUP, SAVE, AND NOTIFY THE RECEIVING AGENCY THAT THE EMPLOYEE'S RECORD CAN BE ACCESSED. THE RECEIVING AGENCY WILL INSERT ANOTHER ROW WITH THE SAME EFFECTIVE DATE IN THE EMPLOYEE'S RECORD, INCREASE THE

Do not use the 'Hire' process when rehiring a former employee. The 'Hire' process will

Do not use the 'Hire' process when rehiring a former employee.
The 'Hire' process will overwrite the original Hire Date, but the 'Rehire' process will not.

Action	Reason (Transaction/Code)
Rehire	A01 Certificate Appointment
	A02 Non-competitive Certificate Appointment
	A03 Reinstatement
	A04 Transfer/Promotion InterAgency
	A05 Transfer/Demotion InterAgency
	A06 InterAgency Lateral New JFD
	A07 Transfer Class to Same Class
	A08 Project Indefinite
	A09 SB 200 (Veterans Act)
	A12 Appointment Special Handicapped (HB1340)
	A14 Unclassified Appointment
	A15 Unclassified Student
	A16 Temporary Unclassified
	A17 Tourism Unclassified Project Appointment
	A18 Priority Consideration Appointment

Action	Reason (Transaction/Code)
	A19 State Work Incentive Program
	A22 Temporary Classified Appointment
	A88 Direct Hire – Professional License
	A89 Direct Hire – Hard to Fill
Recall from Suspension/RIF	A27 Recall from RIF

NOTE: The State of Oklahoma Merit Rule 530:10-9-10 requires certification of qualifications before promotions, demotions, transfers, and reinstatements for classified positions. Refer to the 4B Processing section of this manual for further information.

PERSONAL DATA INFORMATION

Navigate to the Personal Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Personal Data*

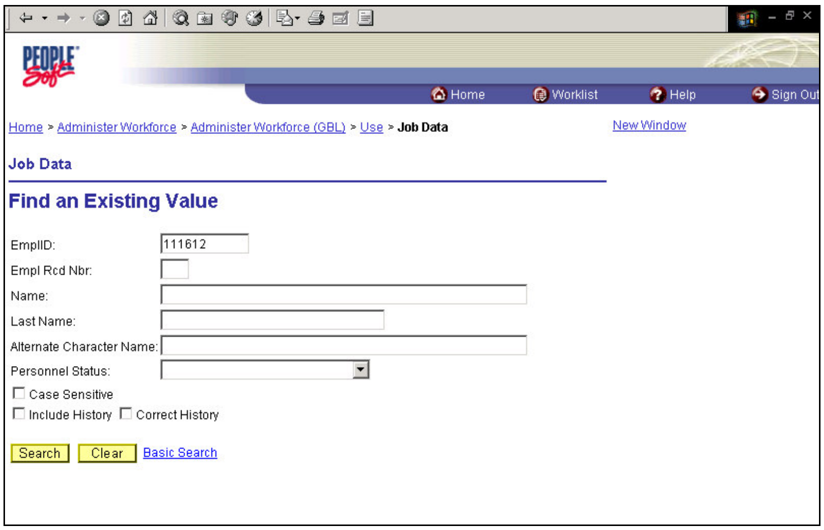
A rehired employee's Personal Data may, or may not, have changed since he last worked for the State of Oklahoma. Verify that the employee's previous Personal Data is still valid. Refer to the Personal Data Changes section of this manual.

JOB DATA INFORMATION

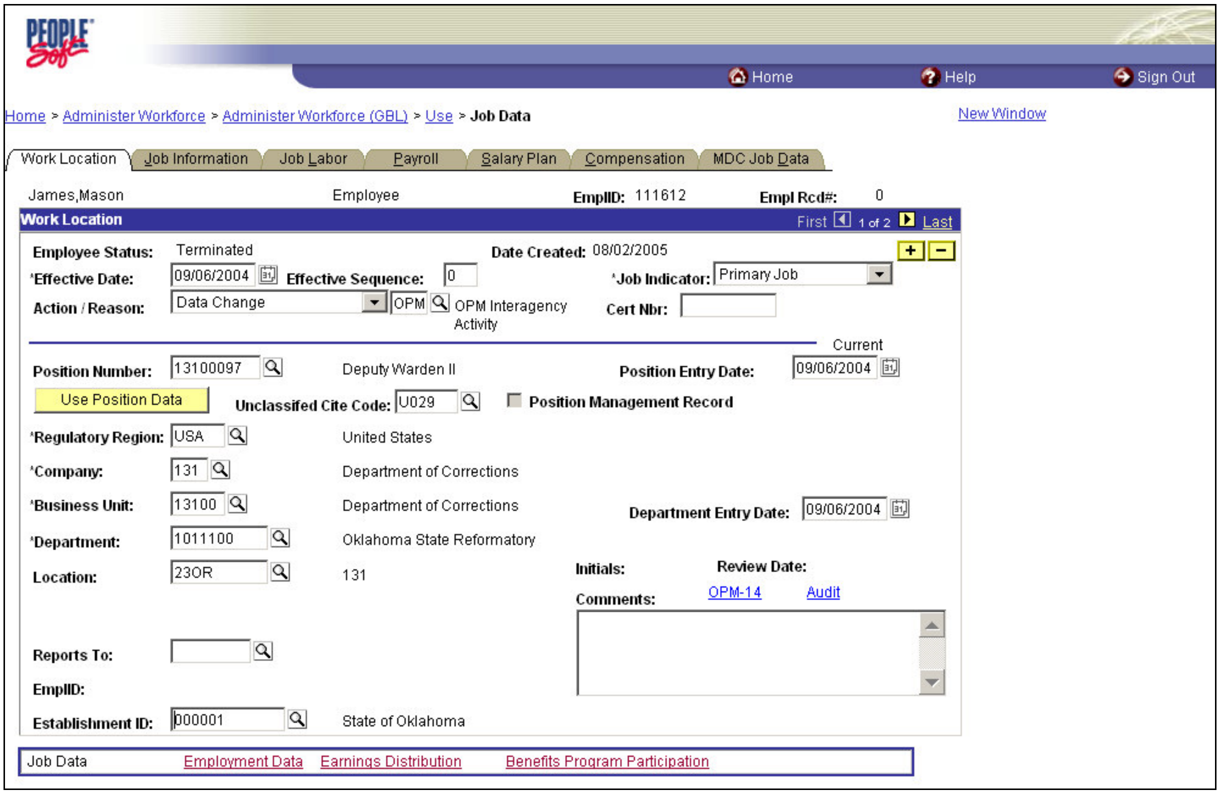
Navigate to the Job Data Component

Navigation: *Administer Workforce > Administer Workforce (GBL) > Use > Job Data*

The search window will be displayed.



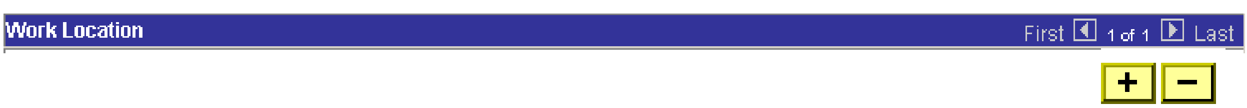
Search for the employee's job record by the EmplID, Last Name, etc. **Enter** the employee's search criteria and **click** Search . EmplID is shown above. Be certain to **select** the correct Job Record, such as '0' for primary job, '1' for secondary job, also known as concurrent job.



If the employee is being rehired at a different agency from the one where he most recently worked, OPM will enter a data row to update the Effective Date and Position Number, as shown above.

Step I – Insert a New Row

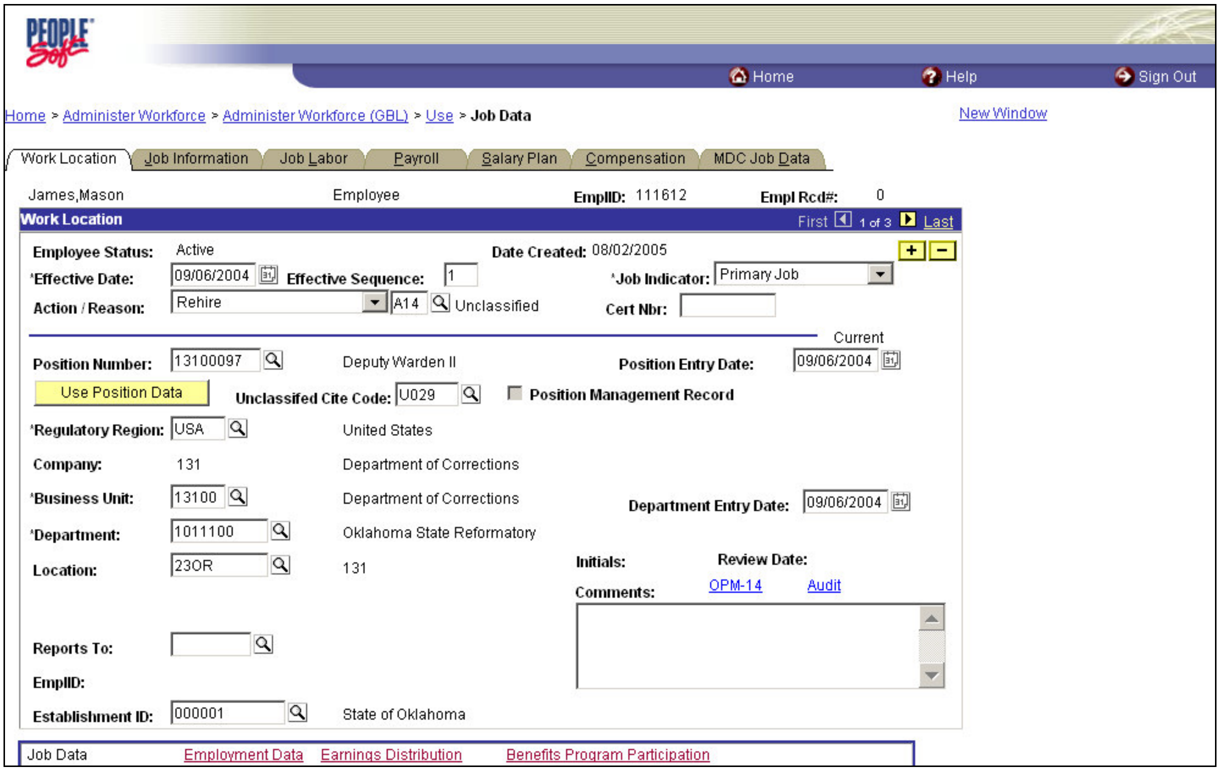
Click + located under the Work Location bar.



The system will make a copy of the existing job record and allow changes to be **enter**ed into the new effective-dated record, as shown below:

STEP II – ENTERING REHIRE INFORMATION

WORK LOCATION PAGE



Employee Status – Note that when the Action 'Rehire' is selected, the employee status automatically changed to 'Active'.

***Effective Date – Enter** the first day the employee will return to work.

***Effective Sequence** – If the rehire is to a different Agency and OPM has initiated the transaction for this effective date, increase this number by 1. If the employee is being rehired at his previous Agency, leave this number as is.

***Job Indicator –** Verify the correct value defaulted.

Action – **Select** 'Rehire'. (Though the employee may be a HIRE to your agency, the employee is a REHIRE for the system.)

Reason – **Enter** the appropriate value from the Lookup.

Cert Nbr –State Certificate Number is required when using Reasons 'A01' or 'A02'.

Position Number – **Select** the appropriate position number or verify the number if the rehire transaction was initiated by OPM.

When you leave the Position field, the system automatically defaults related fields throughout the Job Data component pages. These automatically-populated fields will be grayed out to prevent the operator from changing the field value.

Work Location Page

- Company
- Business Unit
- Department
- Location
- Position Entry Date
- Department Entry Date

Job Information Page

- Job code
- Job Entry Date
- Reg/Temp
- Full/Part Time
- Standard Hours
- FLSA

Payroll Page

- Tax Location Code

Salary Plan Page

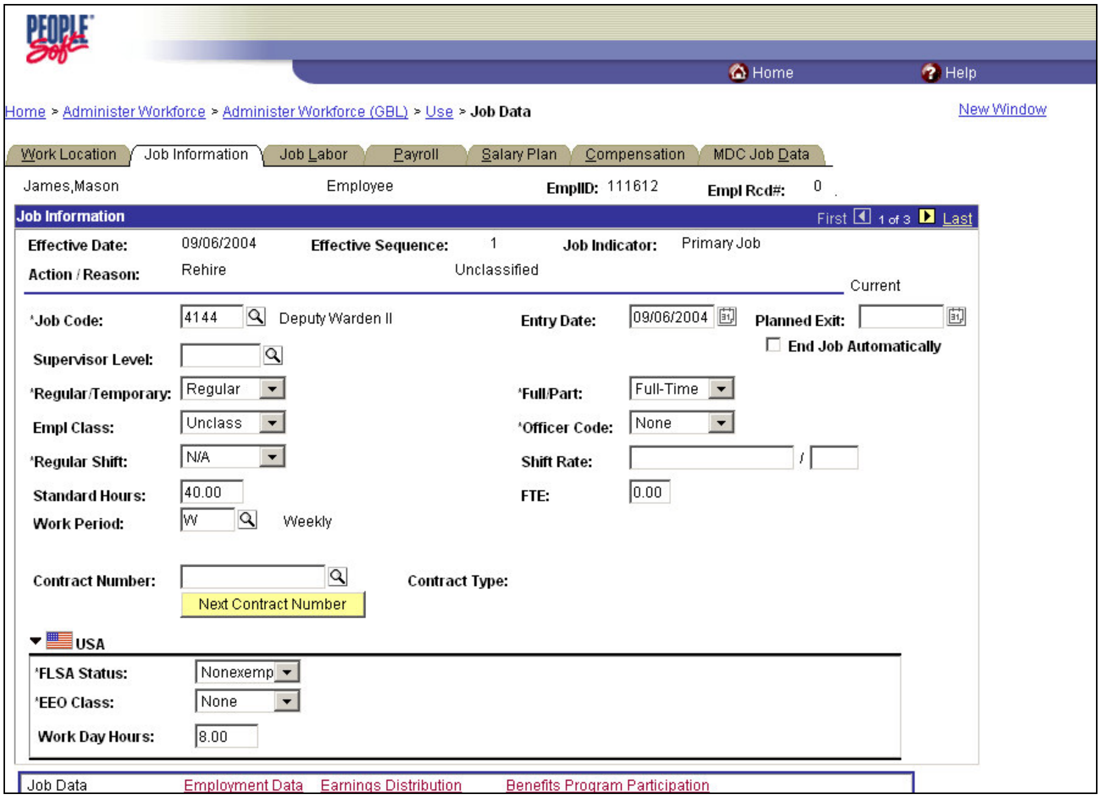
- Salary Administration Plan
- Grade and Grade Entry Date if the Position is Classified
- Grade Entry Date

Alternate Hire Note: If this is an Alternate Hire (the employee is assigned a lower level of the Job Family than the level assigned to the position), it will be necessary to **click** Override Position Data so that the correct Job Code can be entered on the Job Information page.

Unclassified Cite Code – required for all Unclassified hires. The value for this field will default from the Position Number. This field can be overridden if needed.

Job Information Page

Click the 'Job Information' Tab.



*__Job Code__ – Defaults from the 'Position Number' selected earlier. If this is an Alternate Hire, **click** Override Position Data on the Work Location page in order to make the appropriate change to the Job Code.

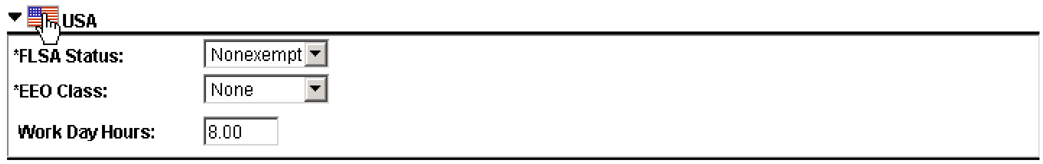
Supervisor Level – This field, indicating whether an employee is a supervisor, is optional. There is reporting capability for this field.

*__Regular / Temporary__ – Defaults from the Position Number selected on the Work Location page.

Empl Class – **Select** one from the dropdown menu. This is a user updated field.

- PClass/TP – Permanent Classified/Trial Period } not applicable to Certificate hires
- Perm Class – Permanent Classified
- Prob Class – Probationary Classified
- Unclassified

Click the dropdown arrow next to the USA flag.



***FLSA Status** – Verify Value
Please review the Oklahoma Policy Guidelines for FLSA as a reference tool when starting the FLSA review (located at http://www.ok.gov/opm/documents/2004FLSAGuidelines.doc).
The FLSA and Pay Group need to be synchronized.

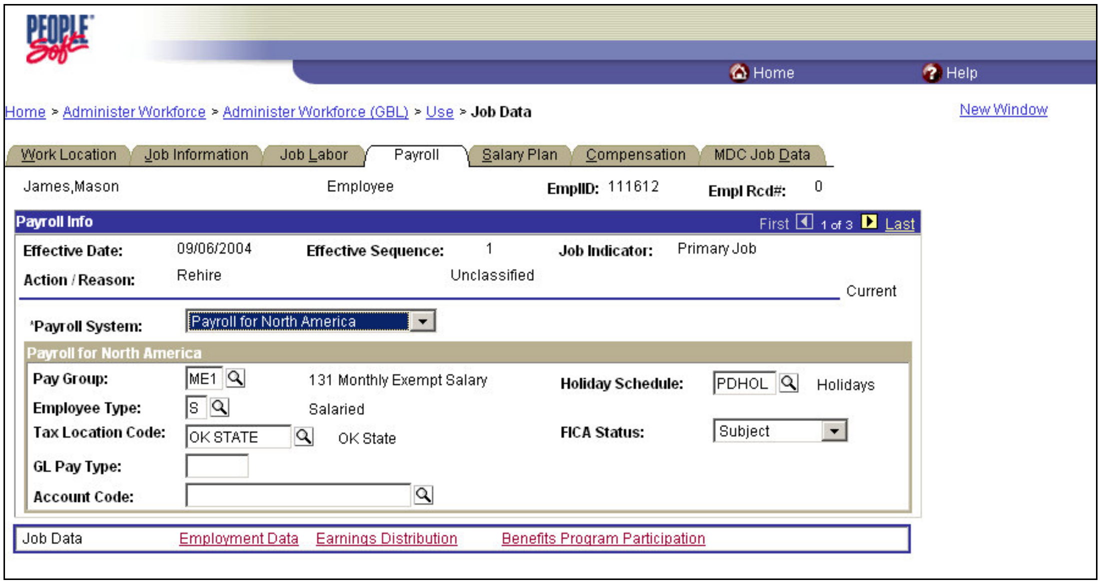
***EEO Class** – Defaults to 'None'.

Work Day Hours – **Enter** the appropriate value. Full Time, Regular = 8 hours.

NOTE: Default values are automatically populated for the following fields: Regular / Temporary, Full / Part, Officer Code, Regular Shift, Standard Hours, Work Period, FLSA Status and EEO Class.

PAYROLL PAGE

Click the 'Payroll' Tab.



***Payroll System** – Defaults to 'Payroll for North America'.

Pay Group – **Enter** the appropriate 'Pay Group' for your agency or verify the Pay Group if the rehire transaction was initiated at OPM.

Holiday Schedule – Update as appropriate.

Employee Type – Update as appropriate.

***Tipped** – If applicable to your agency, defaults to 'Not Tipped', change if necessary.

Tax Location Code – **Select** OK STATE from the drop down list.

FICA Status – Defaults to 'Subject', change if necessary.

COMPENSATION PAGE

Click the ‘Compensation’ Tab.

Employees on a Salary Step: (No manual entries required)

Click Default Pay Components **to execute Pay Component defaults.**

NOTE: You must select the Default Pay Components button under the following conditions in order for the Default Pay Components to be executed:

Changes to Position Number, Department Number, Location or Job Code fields.

Compensation Rate (Display only)

***Frequency –** (Indicates the frequency the employee will be paid). **Enter** the appropriate value:

- M – Employees paid Monthly
- B – Employees paid Bi-weekly

Pay Components

***Rate Code** – **Select** the appropriate value from the Lookup:

- NAANNL – Salaried Employees (paid either Monthly or Bi-weekly)
- NAHRLY – Hourly employees

Comp Rate – **Enter** the appropriate dollar value, either the Annual Salary or Hourly Rate.

Frequency – (Indicates the frequency of the salary). The Frequency value will default from the Rate Code: ‘A’ if the Comp Rate is an annual amount and ‘H’ if the Comp Rate is an hourly amount

For All Employees:

Click [Calculate Compensation]. The system will automatically calculate the Daily, Weekly, Monthly, and Annual Pay Rates

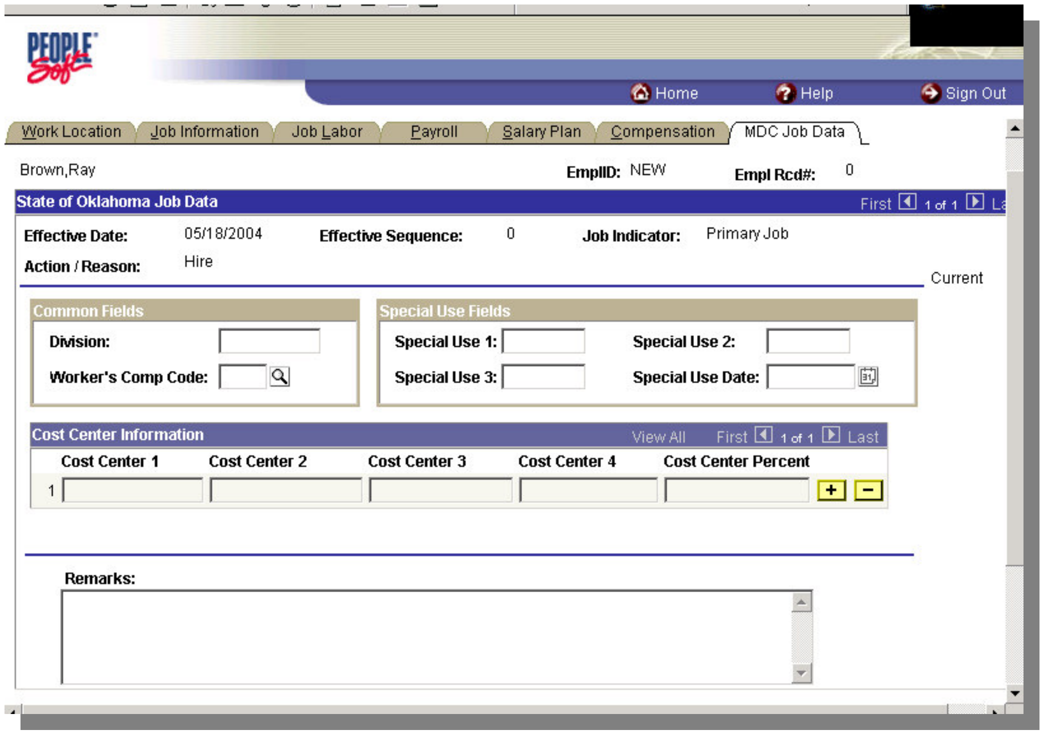
Click the Pay Rates dropdown arrow to view the calculations.

Pay Rates			
Daily	129.230769 USD	**Monthly**	2,800.000000 USD
Weekly	646.153846 USD	**Annual**	33,600.000000 USD

NOTE: For any compensation changes, you MUST click [Calculate Compensation] for it to take effect and pay the correct amount of compensation to the employee.

MDC JOB DATA PAGE – (OPTIONAL PER AGENCY)

NOTE: The MDC Job Data page is a custom page developed for various uses by different agencies. This is not a required page; however, various Agencies may choose to **enter** information as described.



Division – Replaces the Division field from the legacy system. **Enter** if applicable.

Worker's Comp Code – **Enter** the WCC number for reporting and billing purposes, if applicable.

Special Use – Free form fields an Agency can use to **enter** information of its choice. Suggested uses:

- Number of months, days and years the longevity date needs to be backed up for prior service.
- Date the system needs to be backed up to after a break in service for longevity.
- Department numbers meaningful to a specific agency.
- Agency employee ID numbers.
- Agency with other information that is currently needed or used.

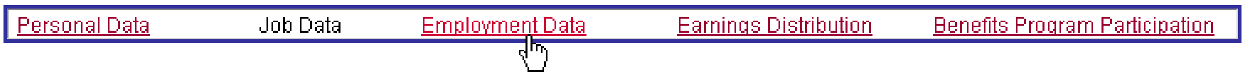
Cost Center Information – The Cost Center Percent field must equal 100% or 0% if not used. For each employee level row of data, multiple Cost Center rows can be entered. If there are multiple Cost Center rows, the combined total of each Cost Center Percent field must be equal to 100%.

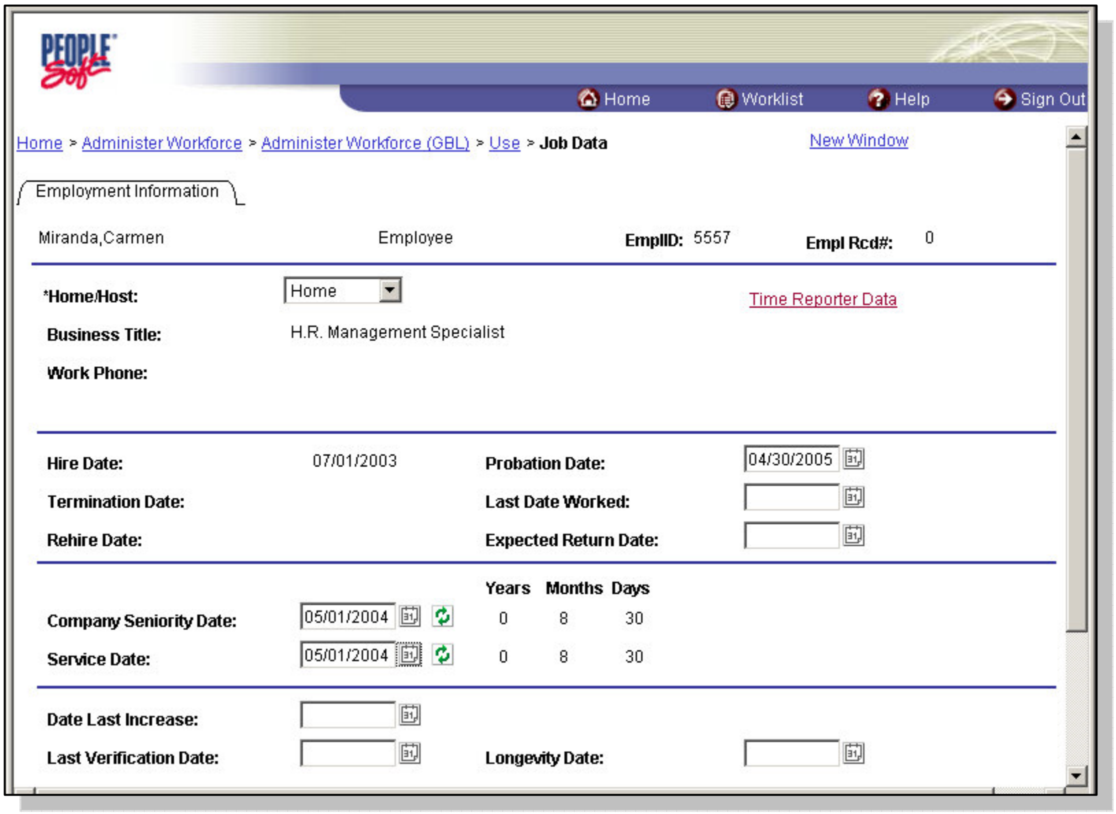
Remarks – Free text that will be printed on the OPM-14. PROVIDE THE AMOUNT OF SHIFT DIFFERENTIAL PAY IN REMARKS.

STEP III – ENTERING OTHER JOB DATA

EMPLOYMENT DATA PAGE

Select the link from the bottom of the page.





Probation Date – (If applicable) The OPM standard for this date is the last date of the employee's probationary status.

Expected Return Date – If the employee is being rehired *Classified*, remove any date in this field.

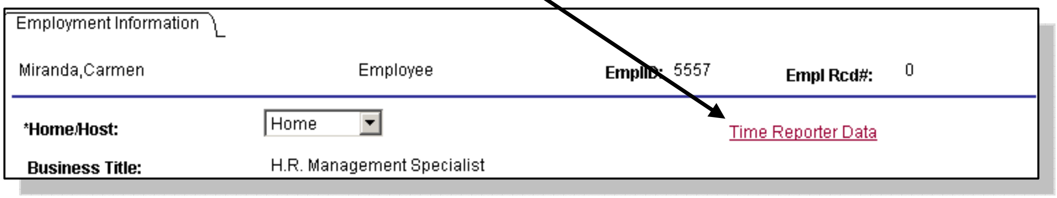
Longevity Date – If the employee is being rehired to a position eligible for Longevity Pay after a break in service of less than 30 days (includes Interagency Transfer), do not adjust this date. If the employee is being rehired to a position eligible for Longevity Pay after a break of more than 30 days, **enter** the Rehire Date. The Special Use fields on the MDC Job Data page are available, at each agency's option, to track the amount of previous service so that the Longevity Date may be updated after two years.
Please refer to the Longevity Pay Program Guide, which can be accessed on the Office of Personnel Management Website at www.opm.ok.gov under *HR and Employee Services.*

Company Seniority Date – If the rehire is to a different agency, **enter** the rehire date.

** **Service Date** – **Required by the State of Oklahoma.** This date is used to determine your annual leave accrual level.

TIME AND LABOR – TIME REPORTER DATA

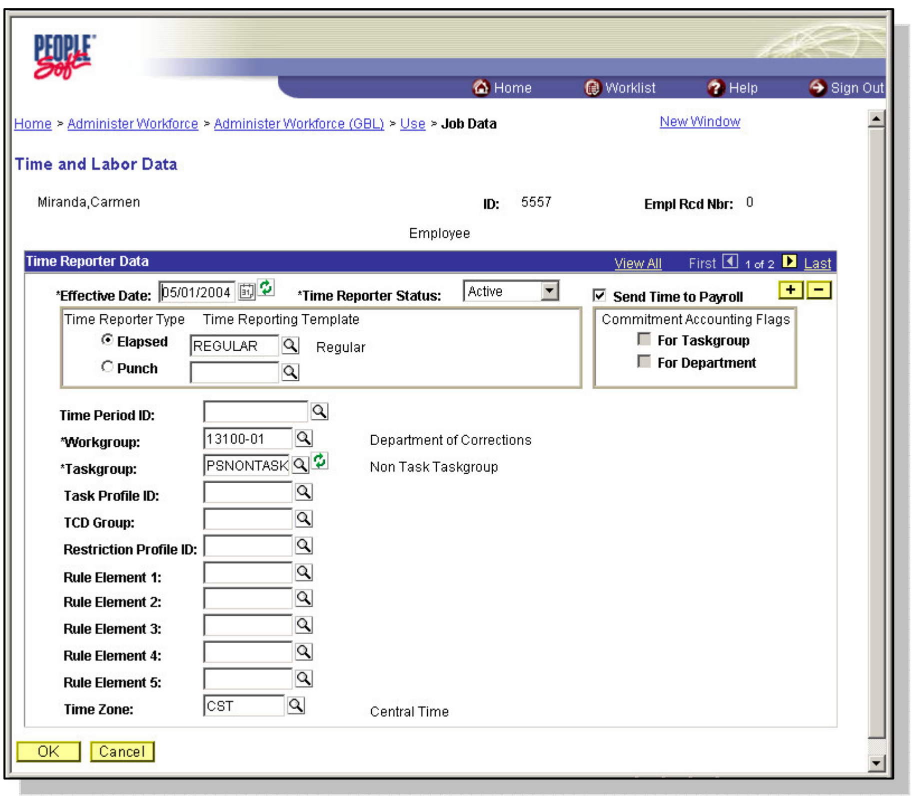
From the Employment Data Page **select** the Time Reporter Data link.



INSERT A NEW ROW

Click [+] located under the Time Reporter Data bar.

The system will make a copy of the existing time and labor record and allow changes to be entered into the new record, as shown below:



Enter the following information:

Effective Date – Date you want to start entering time for. This will usually be the hire date, or the date the employee came to your agency
Time Reporter Status – Active
Send Time to Payroll – Checked
Time Reporter Type – Elapsed
Time Reporting Template – REGULAR
Workgroup – Agency Number + 00 + -01 for Salary or -02 for Hourly (e.g., 54800-01)
Taskgroup – PSNONTASK
Time Zone – CST
Click 

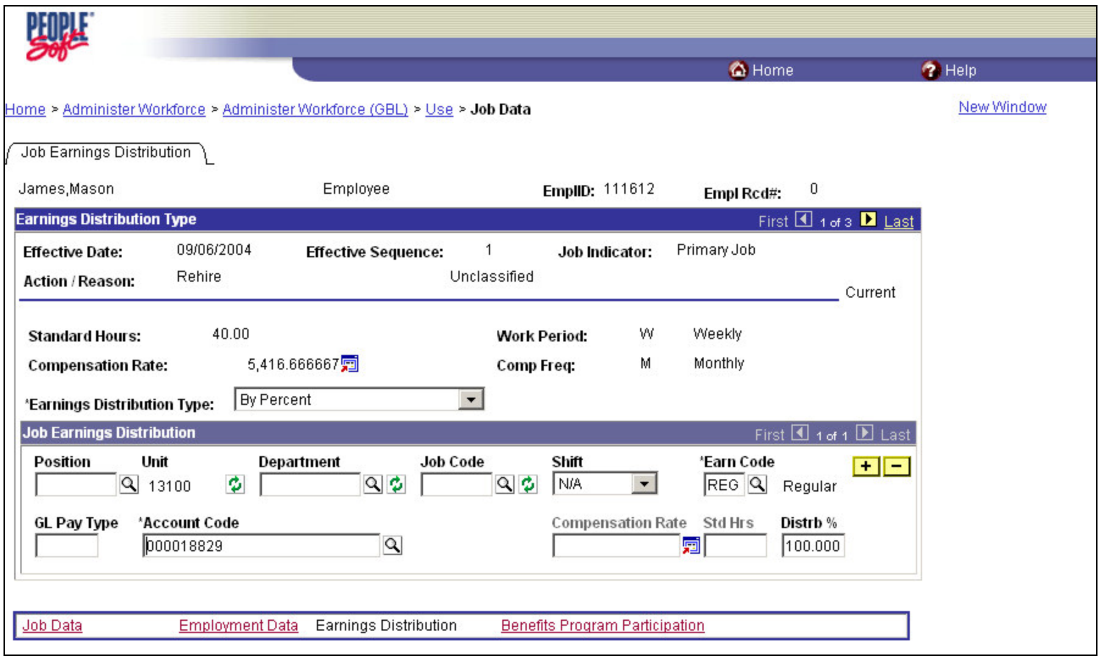
Click 

after the warning message

EARNINGS DISTRIBUTION PAGE

Select the Earnings Distribution Link from the bottom of the page.

The Job Earnings Distribution page will be displayed:



***Earnings Distribution Type** – Defaults to 'By Percent'.

***Unit -** Defaults from Company

Earn Code – Defaults from Pay Group/Employee Type. Values are:

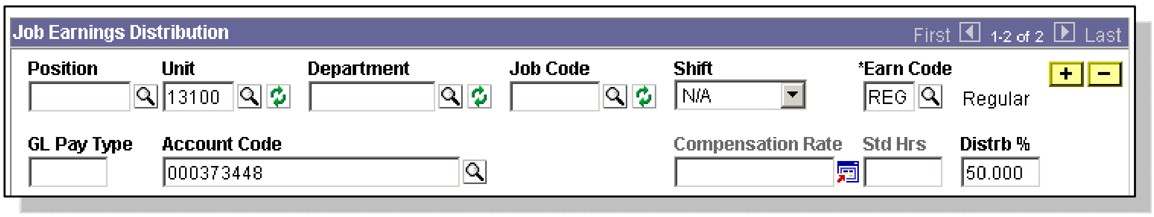
- **REG –** Salaried employees
- **HRG** – Hourly employees
- **LRG –** Legislative employees (Agencies 421 and 422)

Account Code – Enter the associated Account Code.

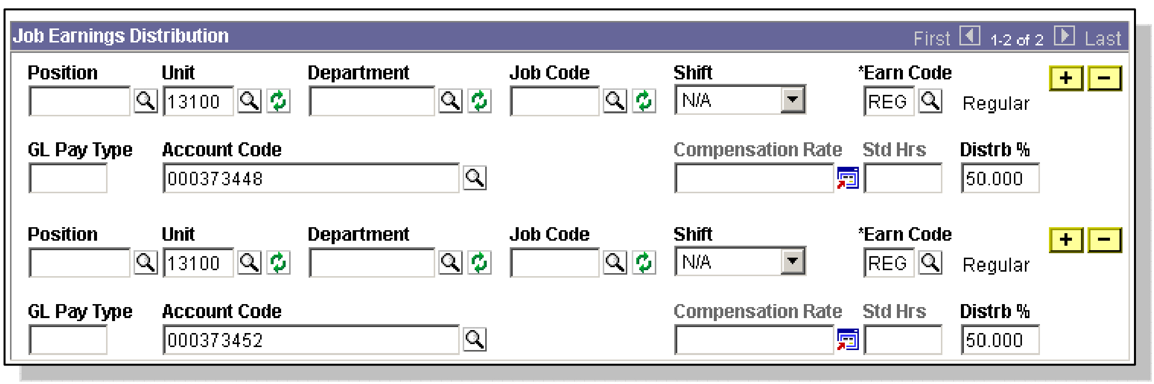
Distrb% - Defaults to '100%'. If other than 100%, **enter** the percentage allocated to the selected Account Code. In the example shown above, 100% was allocated to Account Code 000373448.

Allocating funds to more than one account

For example, allocate 50% to account Code 000373448.



To allocate the remaining percentage to another Account Code, **select** + and a new Job Earnings Distribution row will become available. Simply **enter** the next Account Code and Distrb% values.

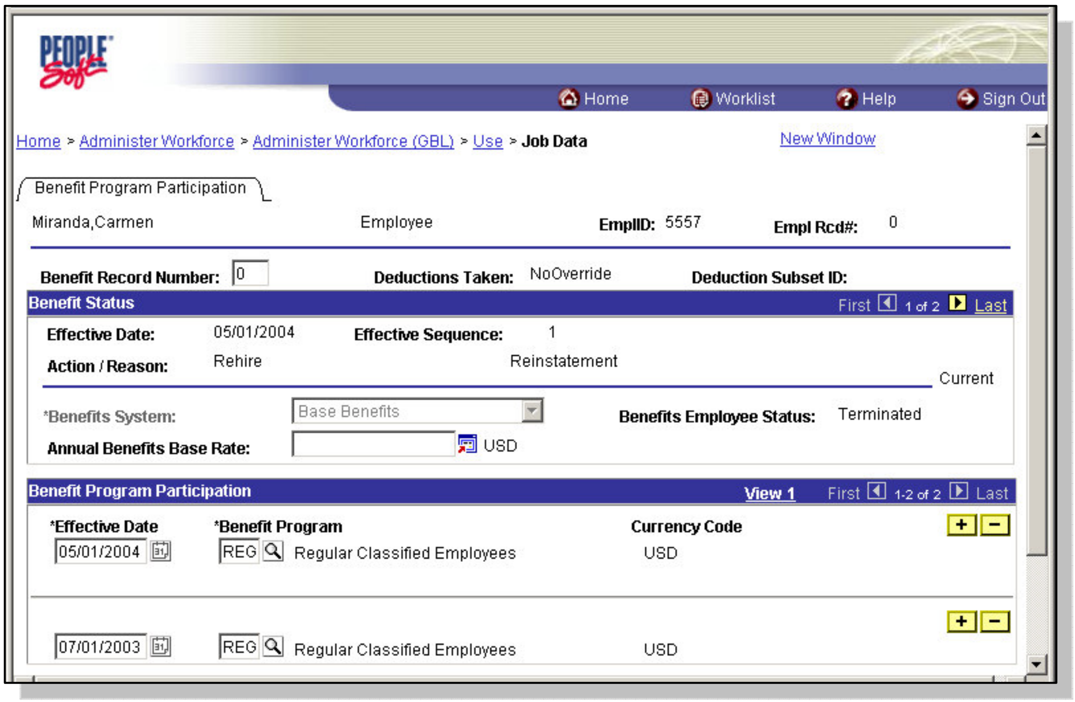


NOTE: The total Distrb% percent must equal 100%.
DO NOT enter a Position Number or Job Code value; only use Department, Earn Code (which defaults from Pay Group), and Account Code and Distrb% fields.

BENEFITS PROGRAM PARTICIPATION PAGE

Select the Benefits Program Participation Link from the bottom of the page.

The Benefit Program Participation page will be displayed:



Benefit Record Number – The value in this field must always match the 'Empl Rcd#'.

***Benefit System –** Defaults to 'Base Benefits'

NOTE: *DO NOT insert a row if the current program is not changing.*

***Effective Date – Enter** the date the benefits will become effective (Rehire date) if applicable.

Click + located under the 'Benefit Program Participation' bar

*__Benefit Program__ – Benefit Program defaults from the Pay Group. Confirm that the value is correct.

Click Save at the bottom of the page to save your changes.

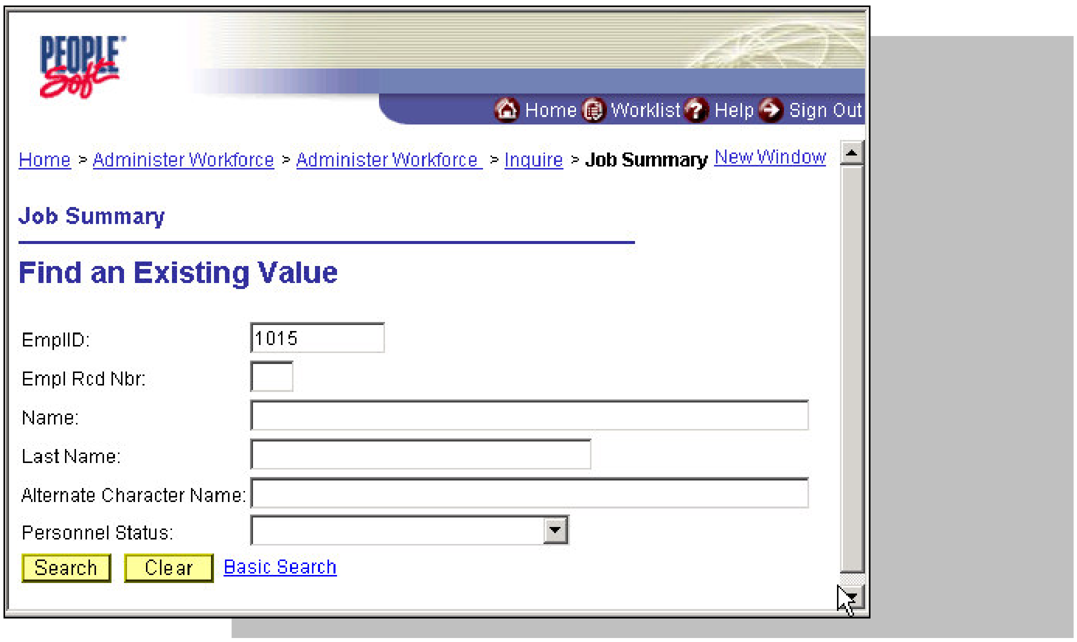
NOTE: Refer to the Payroll [COR105] and Benefits [COR104] manuals for additional updates that are required to get an employee rehired.
CORE Website: http://www.ok.gov/OSF/CORE/HRMS/index.html

VIEWING EMPLOYEE INFORMATION

EMPLOYEE'S JOB SUMMARY

Navigation – *Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary*

STEP I – SELECT EMPLOYEE RECORD



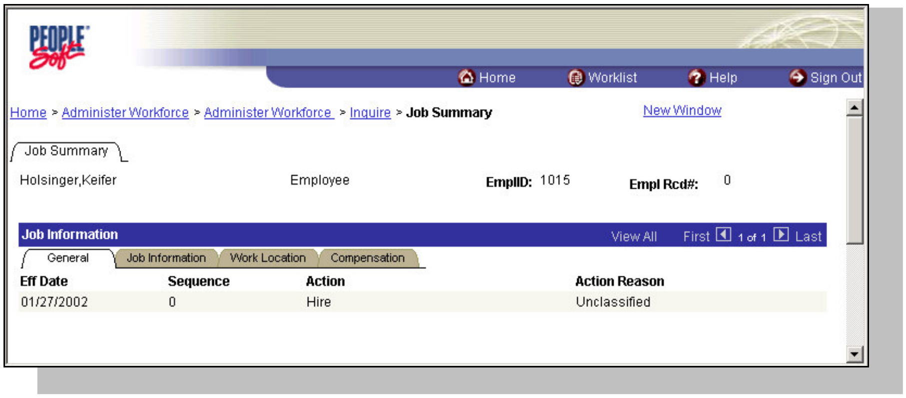
Search for an employee record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search. EmplID is shown above. The Job Summary pages: General, Job Information, Work Location, and Compensation will be displayed.

Job Summary Scenario: *We are going to look at the employee record of Keifer Holsinger, employee number 1015.*

STEP II – VIEWING JOB SUMMARY INFORMATION

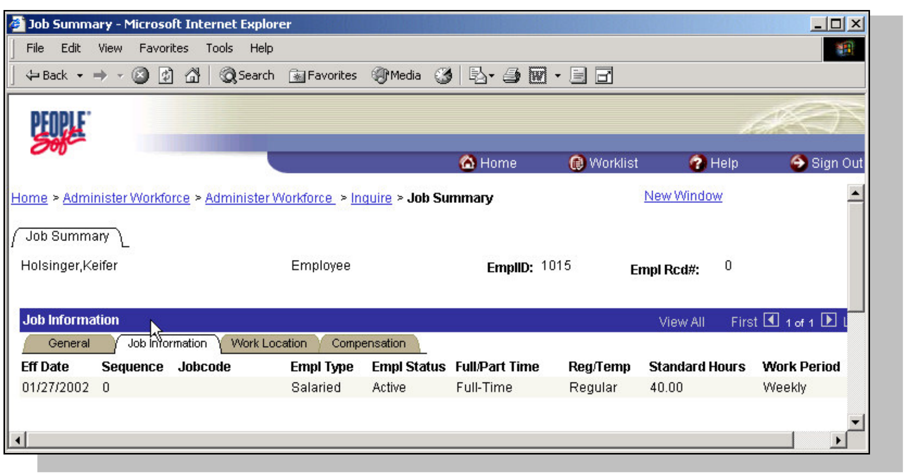
GENERAL TAB

On the General page you will find the effective date for each personnel action associated with the employee. Our example indicates that Keifer's hire date is January 27, 2002.



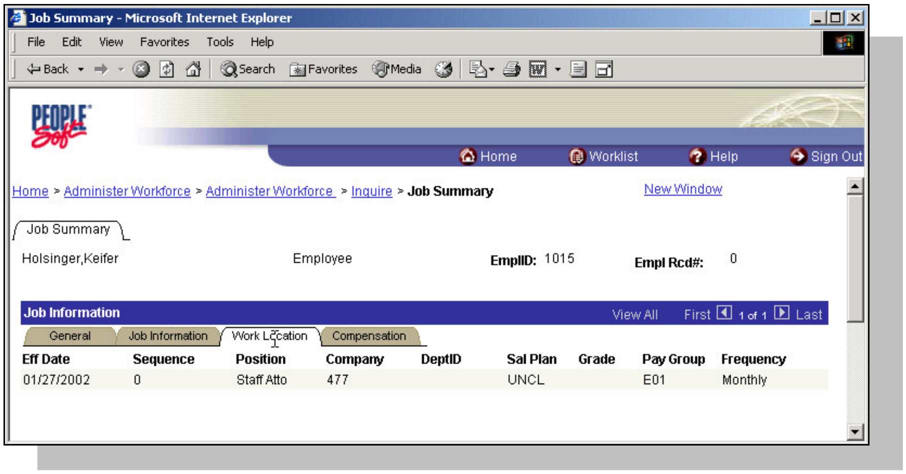
JOB INFORMATION TAB

The Job Information page provides specific information about the employee's job. Keifer is an Active, Full-Time, Salaried employee who works 40 hours a week.



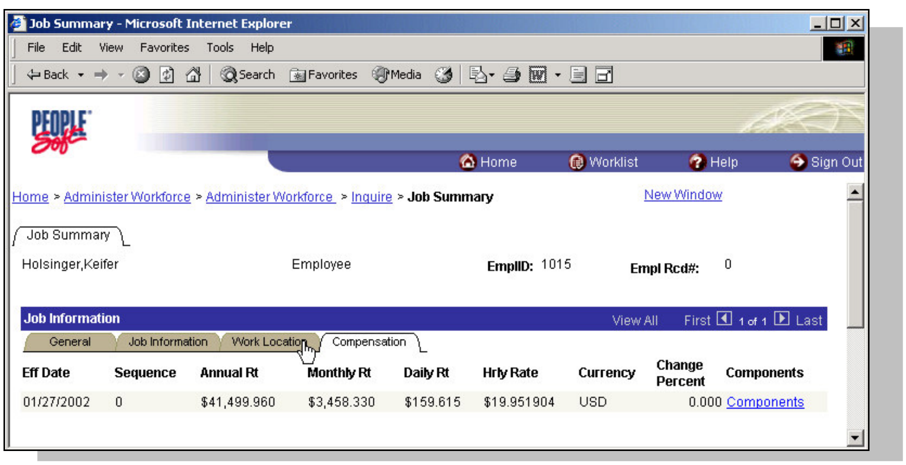
WORK LOCATION TAB

The Work Location page will tell you where this employee works. The company number listed below '477' is the to Agency number. You can also identify Keifer's current position and salary plan.



COMPENSATION TAB

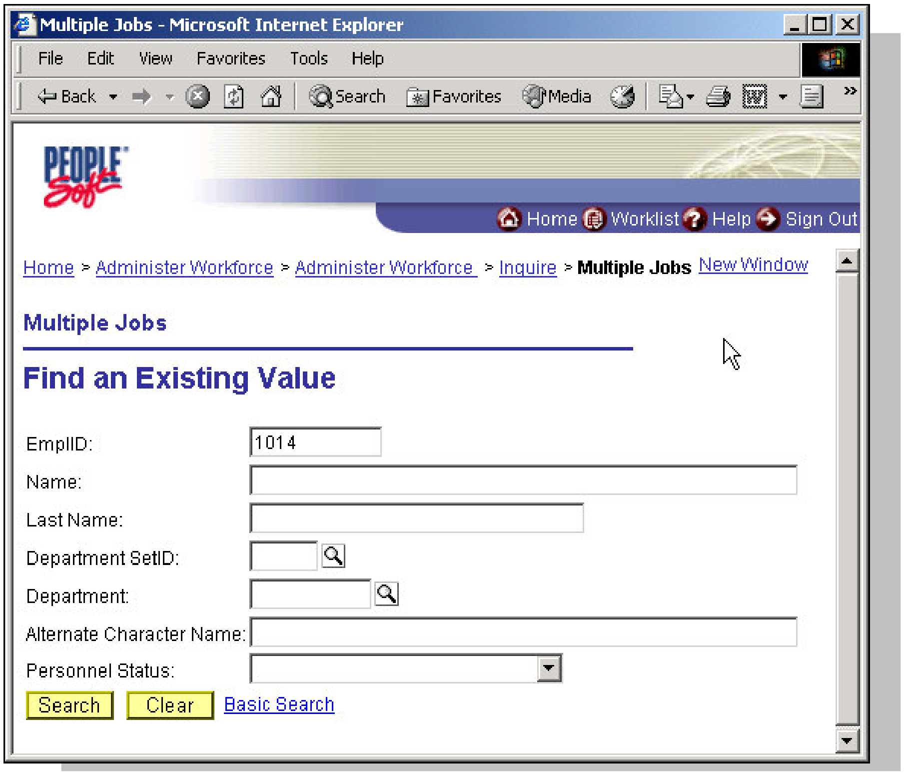
The Compensation page will display the employee's Annual, Monthly, Daily, and Hourly rates of pay.



MULTIPLE JOBS

Navigation – *Administer Workforce > Administer Workforce (GBL) > Inquire > Multiple Jobs*

STEP I – SELECT EMPLOYEE RECORD



Search for an employee record by the EmplID, Last Name, etc. **Enter** the parameters for the search and **click** Search . EmplID is shown above. The Job Summary pages: General, Job Information, Work Location, and Compensation will be displayed.

Job Summary Scenario: *We are going to look at employee record number 1014 to view the job history.*

STEP II – VIEWING MULTIPLE JOBS

EMPLOYEE TAB

On the Employee page you will find the total number of jobs that an employee has held. In our example, this employee has two jobs. Notice how one is the primary and the other is the secondary.

Rogers,Owen Employee **EmplID**: 1014

As Of Date: 02/20/1999

Job Information View All First 1-2 of 2 Last

Employee | Position Data | Job Information

Empl Rcd#	Status	Job Indicator	Effective Date	Sequence
0	Active	Primary	12/30/1995	0
1	Active	Secondary	02/20/1999	0

POSITION DATA TAB

To find out what agency, department, or position is currently active for an employee, you can refer to the Position Data page.

Rogers,Owen Employee **EmplID**: 1014

As Of Date: 02/20/1999

Job Information View All First 1-2 of 2 Last

Employee | Position Data | Job Information

Empl Rcd#	Position	Company	Department	Location
0	Human Reso	830	Administration and Data Svcs	Department Of Human Services
1	Waitperson	566	Division of State Parks	OK Tourism & Recreation Dept.

JOB INFORMATION TAB

Refer to the Job Information page to view the Job Title, standard hours or work period per job.

Rogers,Owen Employee **EmplID**: 1014

As Of Date: 02/20/1999

Job Information View All First 1-2 of 2 Last

Employee | Position Data | Job Information

Empl Rcd#	Business Unit	Job Title	Standard Hours	Work Period
0	83000	Human Resources Management Spe	40.00	Weekly
1	56600	Waitperson I	10.00	Weekly

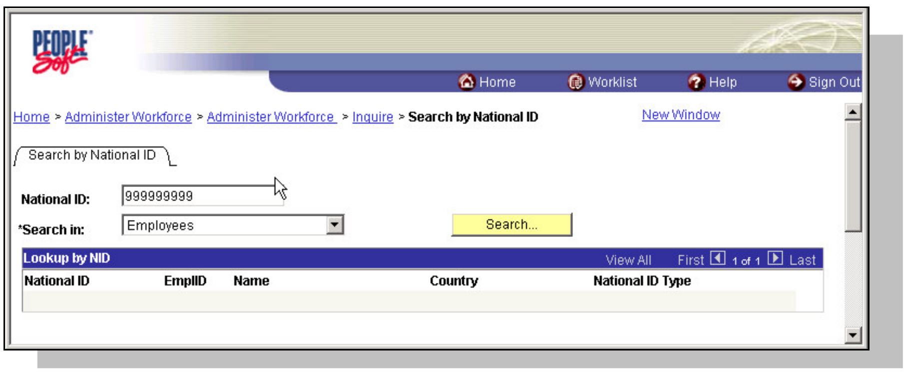
SEARCH BY NATIONAL ID (SSN)

STEP I – NAVIGATE TO SEARCH PAGE

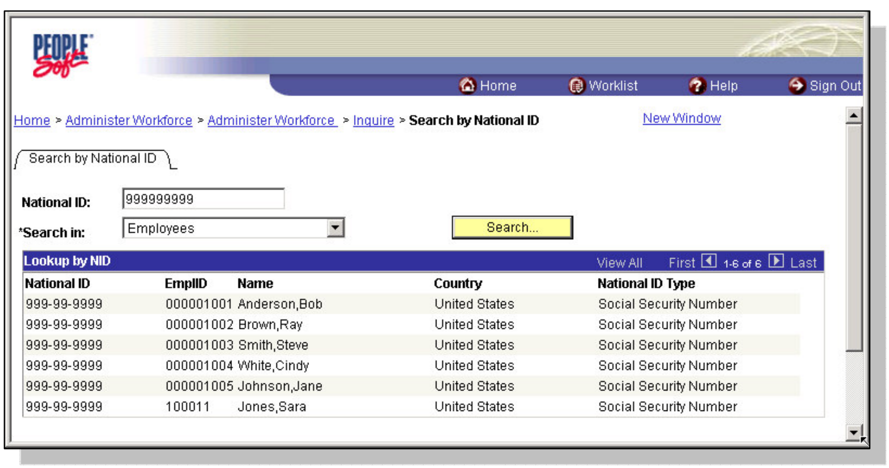
Navigation – ***Administer Workforce > Administer Workforce (GBL) > Inquire > Search By National ID***

STEP II – ENTER SEARCH CRITERIA

Enter the Social Security Number and **click** Search . In our example we will be using a fictitious Social Security number. (You have to **click** Search to retrieve the information.)



STEP III – VIEW RESULTS



NOTE the EmplID which is the fastest method to access Personal Data, Job Data, or Payroll pages.

APPENDIX A

HOW PERSONNEL ACTIONS WILL AFFECT PAYROLL PROCESS.

PERSONNEL ACTION	EMPLOYEE STATUS	TRIGGERS A PAYROLL CHECK.
Hire Rehire Return from Leave Additional Job Recall from Suspension/Layoff	*Active*	Yes
Leave of Absence	*Leave of Absence*	No
Paid Leave of Absence	*Leave with Pay*	Yes
Suspension	*Suspended*	No
Retirement	*Retired*	No
Termination	*Terminated*	No
Pay Rate Change Demotion Data Change Job Reclassification Position Change Probation Completion of Probation Promotion Transfer Appointment.Change Same Agency	Same status as the previous data row. If no previous data row exists, the system sets the status to *Active.*	Varies

APPENDIX B

PEOPLESOFT TERMINOLOGY

State of Oklahoma	PeopleSoft
Agency Number	Company and/or Business Unit
Warrant Sequence	Mail Drop
Agency EOD	Company Seniority Date
State EOD	Hire Date
Payroll Frequency	Compensation Frequency
JFD / Class	Job Code
Band / Grade	Grade
Monthly Pay / Hourly Pay	Compensation Rate
Transaction	Action / Reason
Reinstatement Date	Expected Return Date

APPENDIX C

HR REPORTS

REPORT NAME	AVAILABLE TO ALL AGENCIES	AVAILABLE TO OPM	AVAILABLE TO OSF
Agency Employees by Job Code [0073]	X	X	
Agency Incumbents by Position [0077]	X	X	
Agency Listing by Job Code [0067]	X	X	
Agency Totals Legal Entity [0068]	X	X	
Allocation Letter Agency [0118]		X	
Allocation Letter to Delegation Authority [0119]	With Delegation Auth	X	
Annual Payroll Distribution [0078]	X	X	
Annual Salary Analysis [0079]	X	X	
Approved or Denied Personnel Action [0121]	X	X	
Average Salary Analysis [0069]	X	X	
Employee by Job Code [0070]	X	X	
Employee for Selected Cite Code [0071]	X	X	
Employee Salaries >= $50K [0080]		X	
Employees by Agency then Job Code [0072]	X	X	
FLSA Category Non-Exempt Positions [0081]	X	X	
Job Code Usage by Agency [0074]	X	X	
Position Allocation Date [0082]	X	X	
Positions by EEO Category [0083]	X	X	
Salary by Job Code [0075]	X	X	
Supervisory Listing Report [0175]	X	X	
Unclassified Allocation Letter to Agency [0120]		X	
Unclassified Employees [0076]	X	X	
Unclassified Positions by Agency [0117]	X	X	

APPENDIX D

OPM-14 – RUN AND PRINT

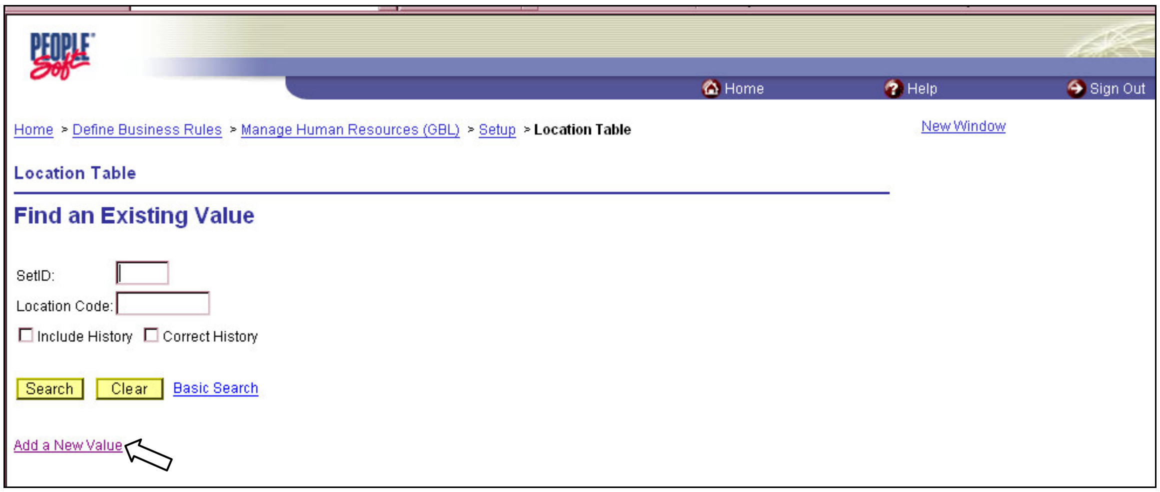
Navigation: *Reports Menu > Ocp Reports > HR > Personnel Action Report(0121)*

- **Select** Run Control ID
- Populate the From/Through Agency Number field
- **Select** either 'Effective Date' or 'Approved/Rejected Date'
- Populate the Date Begin and Date End fields
- Optional Fields may be selected but are not required. **Select** just one or a combination
- **Select** an OPM-14 Sort Option
- **Click** Run
- Server Name should be PSNT
- **Select** the OCPHR0121RPT checkbox
- Type and Format will remain 'None' but the OPM-14 document will be in PDF format
- **Click** OK
- Make a note of the Process Instance Number
- **Click** on Process Monitor
- **Click** Refresh until all Run Status indicators read "Success"
- **Click** on "Details" associated with the Crystal Process Type
- **Click** on "View Log/Trace"
- **Click** on the Report identified with the PDF format
- Print the desired OPM-14s
- After exiting report, **click** Process Requests or
- To delete jobs that do not run to Success, open a Help Desk case to delete the job(s).
- To process another report return to 'Home' and **select** the appropriate navigation

APPENDIX E

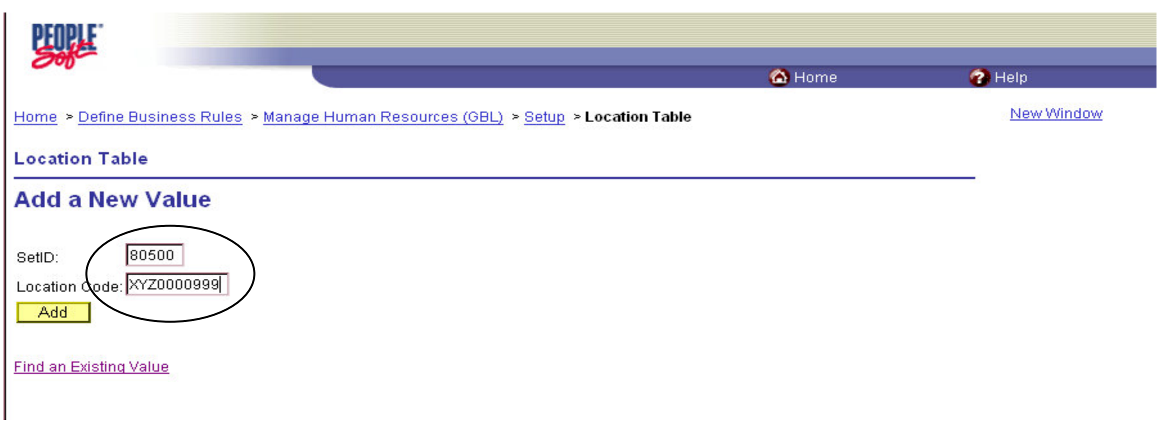
ADDING A NEW LOCATION

Navigation: <u>Home</u> > <u>Define Business Rules</u> > <u>Manage Human Resources (GBL)</u> > <u>Setup</u> > Location Table

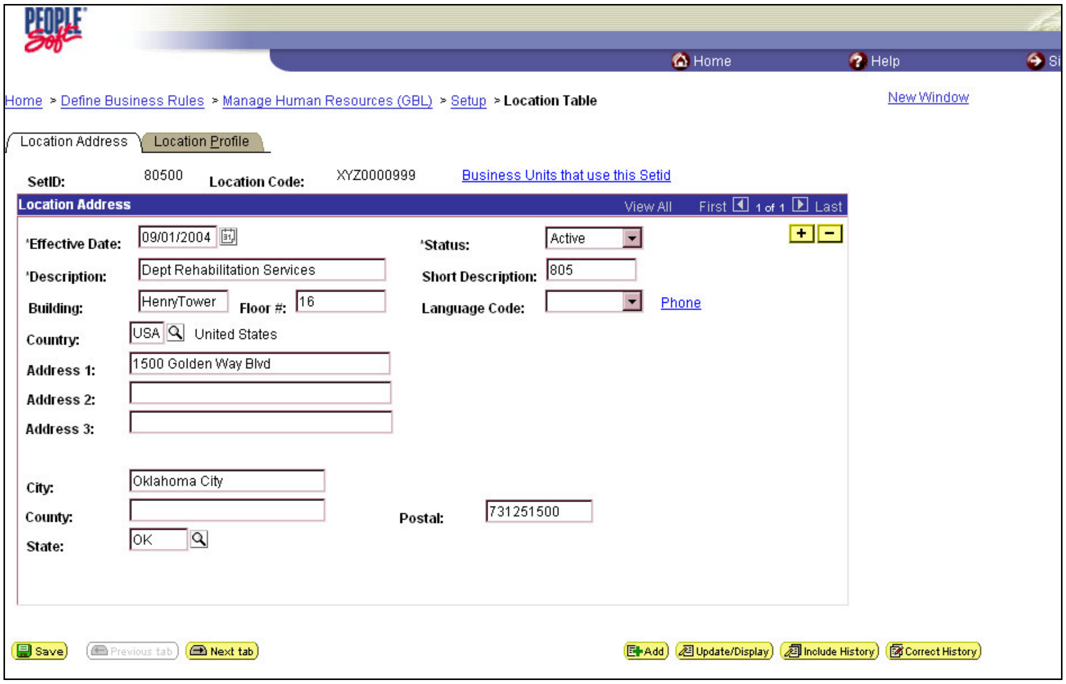


Click <u>**Add a New Value**</u> and it will display the next screen.

Enter the SetID which is your Business Unit (Agency Number + 00).
Add the new Location Code (alpha/numeric up to 10 characters).
Click Add to continue or press **enter** on your key board.



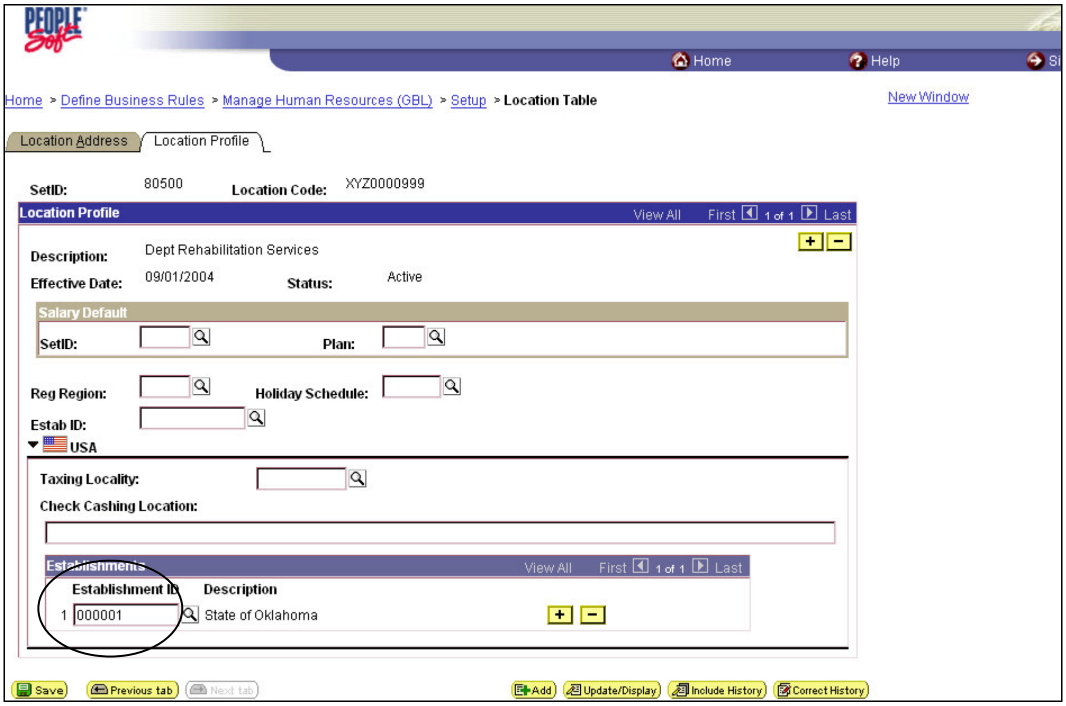
LOCATION TABLE – LOCATION ADDRESS



Update the following fields:

- Effective Date
- Description
- Short Description
- Building, if applicable
- Floor, if applicable
- Address
- City
- Postal
- State

LOCATION TABLE – LOCATION PROFILE



Select the Location Profile Tab. The only field that needs to be populated on this page is the Establishment ID that is located under the USA flag.

Select 

at the bottom of the page.

APPENDIX F

INFORMATION TO BE USED FOR THE EEO-4 REPORT/AFFIRMATIVE ACTION PLAN

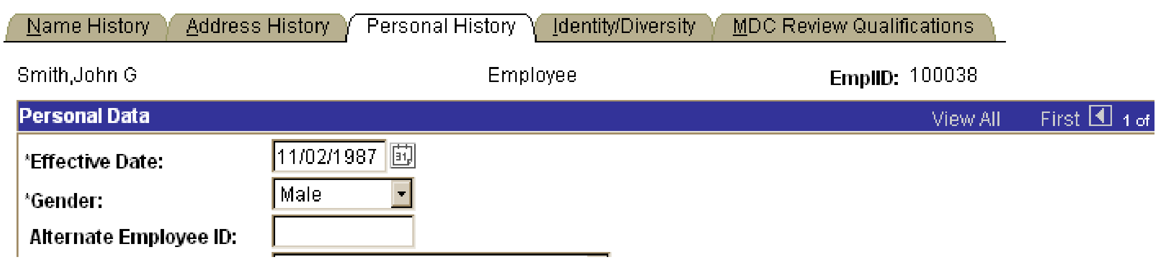
The EEO-4 Report Category in PeopleSoft supports the Federal mandate for EEO reporting and is delivered and maintained by PeopleSoft. As Federal updates are made to the process and reporting requirements, updates are provided by PeopleSoft/Oracle.

The Affirmative Action Plan will be built from queries in the PeopleSoft system and other data, such as census data, and compiled in a comprehensive report.

The fields in PeopleSoft that are utilized for EEO-4 and Affirmative Action reporting information are:

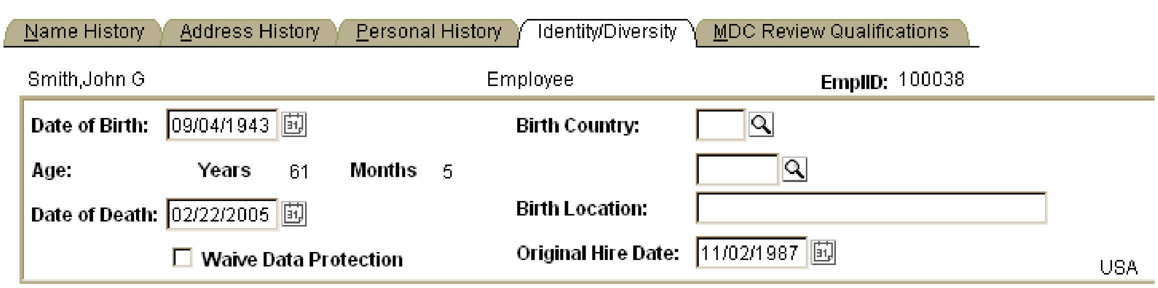
PERSONAL DATA:

Personal History Tab: Gender field (required field in PeopleSoft)



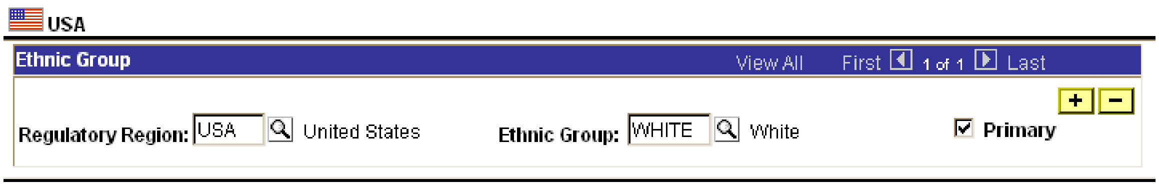
NOTE: If the gender field is missing in the hiring process, a Help Desk Case must be submitted to correct the field. (This field resides on an effective-dated page.)

Identity/Diversity Tab: Date of Birth field (required field in PeopleSoft)



NOTE: The Date of Birth field is not an effective-dated field. The agency user can update this field at any time without filing a Help Desk Case.

Identity/Diversity Tab: Ethnic Group (under the USA Flag):



Search Results

View All First 1-7 of 7 Last

Ethnic Group	Description	Short Description
AMIND	American Indian/Alaska Native	Am. Ind
ASIAN	Asian	Asian
BLACK	Black/African American	Black
HISPA	Hispanic/Latino	Hispanic
NSPEC	Not Specified	Not Specif
PACIF	Native Hawaiian/Other Pacific Islander	Hawaii/Pac
WHITE	White	White

The selections for the ethnic group field are all valid. 'Not Specified' is a valid selection and will be included in the total for white. Visual observation may be made and the information used to update the Ethnic Group value by the agency user in accordance with the EEO-4 Instructions published by the Equal Employment Opportunity Commission Office.

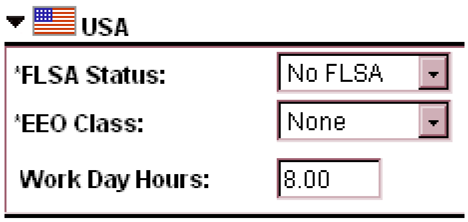
NOTE: The Ethnic Group field is not an effective-dated field. The agency user can update this field at any time without filing a Help Desk Case.

NAVIGATE TO THE JOB RECORD:

Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data

The second tab on the job data page is the Job Information Tab:

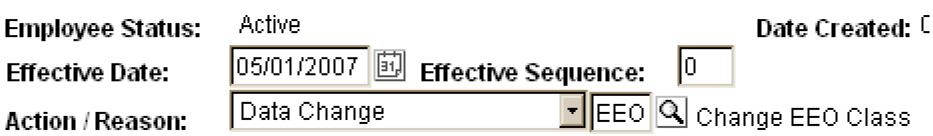
Job Information Tab: Under the USA flag, there are three fields: The FLSA , the EEO Class and the Work Day Hours:



The EEO Class has a drop down box with the choices of Exclude, None, PR Trainee and WC trainee. The two choices the State of Oklahoma uses are Exclude and None. None indicates the employee will be counted in the EEO-4 Report and Affirmative Action Plan.

'Exclude' indicates the employee is excluded from the count on these two reports. There are certain employees excluded from the EEO-4/Affirmative Action reports. Some employees are excluded from the EEO-4 and not the Affirmative Action or vice-versa.
Examples of some of the exclusions are: elected officials, Carl Albert Interns, etc. Agency users will need to check the reporting guidelines and training information for the entire list of exclusions and which report(s) the employee should be excluded.

To change an employees' EEO Class status, the agency user should insert a row, **select** the action of Data Change and use the Reason Code of EEO Change:



NOTE: Questions regarding the EEO-4/Affirmative Action process should be directed to the EEO/Workforce Diversity office at the Office of Personnel Management.