Infor Infinium HCM Human Resources Guide to Processing

Volume 1

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About This Guide

This section focuses on the following information:

- Purpose of this guide
- Conventions used in this guide

Intended Audience

The *Infinium Human Resources Guide to Processing* is written for all users of Infinium Human Resources (Infinium HR) including those who perform daily data entry, Human Resources and Payroll managers, line supervisors and system administrators who provide technical support to Infinium HR users.

Purpose of This Guide

The purpose of this guide is to provide you with an in-depth explanation of basic processing concepts in Infinium HR and instruct you on how to perform Infinium HR daily processing tasks. This guide is intended to be used as a supplement to classroom training and as a reference guide after training is complete.

Organization of This Guide

This guide is task-oriented. Related tasks are grouped into topics. Topics are grouped into parts. Each topic contains overview and task information.

Refer to the *Infinium Human Resources Guide to Controls* for information on how to define and maintain Infinium HR controls.

Conventions Used in This Guide

This section describes the following conventions we use in this guide:

- Fonts and wording

- Function keys
- Character-based vs. graphical-based screens
- Prompt and selection screens
- Promptable fields
- Infinium applications and abbreviations

Fonts and Wording

Convention	Description	Example
Italic typeface	Menu options and field names The guide uses the same abbreviations as the screen.	*Master Files* Use *Max Lnth* to specify the maximum length of alpha user fields.
Bold standard typeface	Used for notes, cautions and **WARNING**s	**Caution:** You must ensure that all Infinium PY users are signed off before reorganizing and purging. If there are jobs in the queue, those files will not be reorganized.
Bold monospaced typeface	Characters that you type and messages that are displayed	Type **Infinium PY** in the *System* field. The following message is displayed: **Company not found**
F2 through F24	Keyboard function keys used to perform a variety of commands.	Press F2 to display a list of available function keys.
F13 through F24	Function keys higher than F12 require you to hold down the Shift key and press the key that has the number you require minus 12.	Press F16 to update the journal.
Select	Choose a menu option or choose a record or field value after prompting.	Select *Employer Controls.* Select a record. From the *List* menu, select *Display*.

Convention	Description	Example
Press Enter	Provide information on a screen and when you have finished, press Enter to save your entries and continue.	Press Enter to save your changes and continue.
Exit	Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence.	Press F3 to return to the main menu.
Cancel	Cancel the work at the current screen or dialog box, usually to return to the prior screen.	Press F12 to cancel your entries.
Help	To access online help for the current context (menu option, screen or field), press Help (or the function key mapped for help). To move through the other applicable levels of help, press Enter at each help screen. To return directly to the screen from which you accessed help, exit the help screen by clicking Exit or by pressing F3.	Press Help for more information about the current field.

Convention	Description	Example
[Quick Access Code]	Quick access codes provide direct access to functions. Most quick access codes in Infinium Payroll consist of the first letter of each word of the menu option name. Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	Select *Update Employer Controls* [UCO].
Publication titles	Unless otherwise stated, titles refer to Infinium applications and use standard name and abbreviations.	*Infinium Training Administration Guide to Setup and Processing* is referred to as *Infinium TR Guide to Setup and Processing.*

Function Keys

Infinium AM function keys and universal Infinium PY function keys for the IBM AS/400 or iSeries are described in the following table. All Infinium PY function keys are identified at the bottom of each screen.

Function Key	Name	Description
F1	Help	Displays help text
F2	Function keys	Displays window of valid function keys
F3	Exit	Returns you to the main menu
F4	Prompt	Displays a list of values from which you can select a valid entry
F10	Quick Access	Enables you to access another function from any screen

Function Key	Name	Description
F12	Cancel	Returns you to the previous screen
F22	Delete	Deletes selected item(s)
F24	More keys	Displays additional function keys at the bottom of the screen

Character-based vs. Graphical-based Screens

The sample screens in this guide may be either character-based or graphical-based. Samples of both are included below.

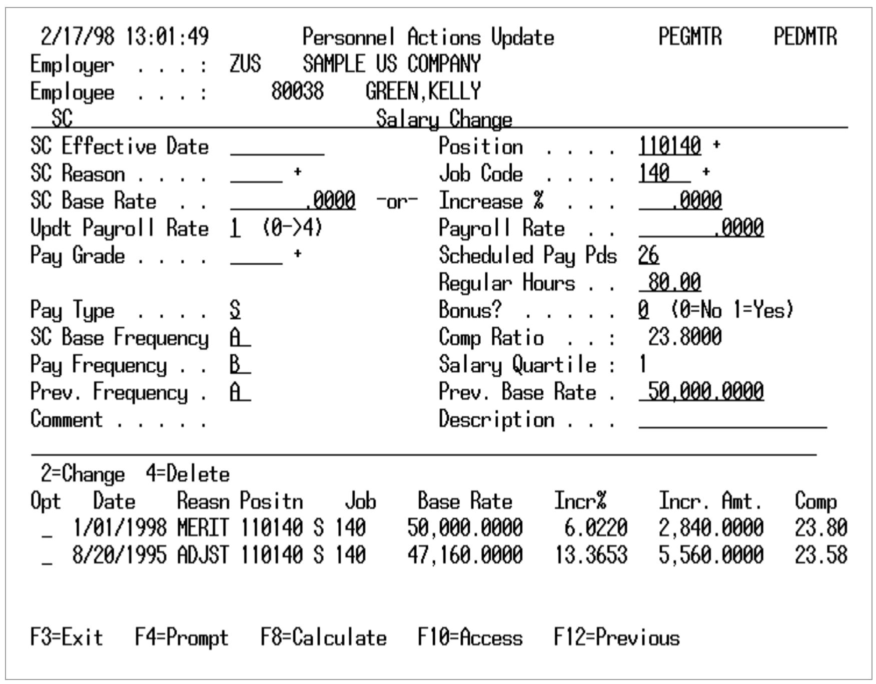


Figure 1: Sample character-based screen for Infinium HR suite

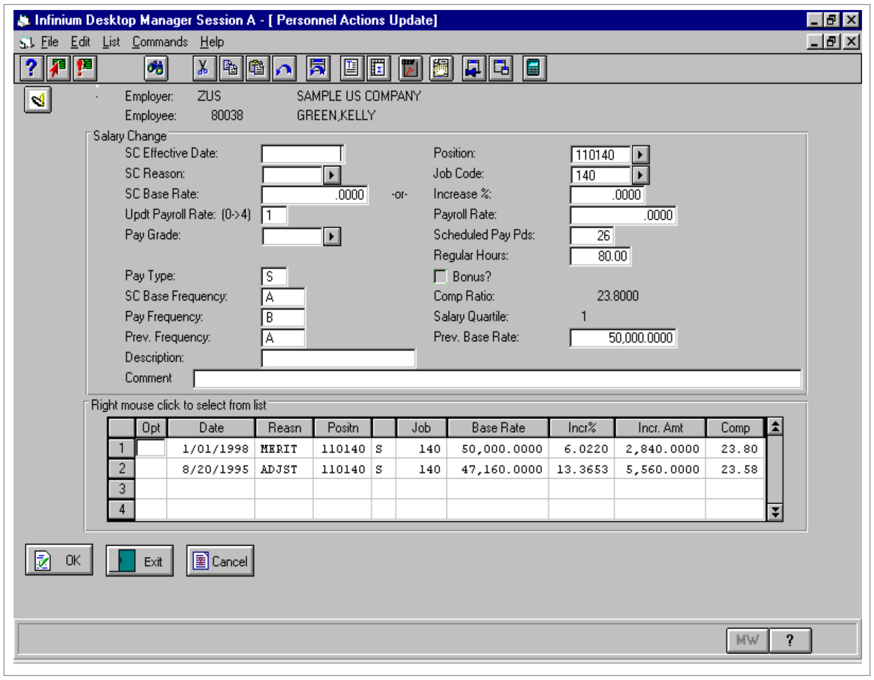


Figure 2: Sample graphical-based screen for Infinium HR suite

Prompt and Selection Screens

A prompt screen, similar to Figure 3, is the screen in which you type information to access a record or a subset of records in a file.

A selection screen, similar to Figure 4, is the screen from which you select a record or records to perform an action.

When we first explain a task in this guide, we fully document how you access a prompt and selection screen. If a related task uses that prompt or selection screen, we include the prompt and selection steps in that task. However, we do not include the screen(s) again.

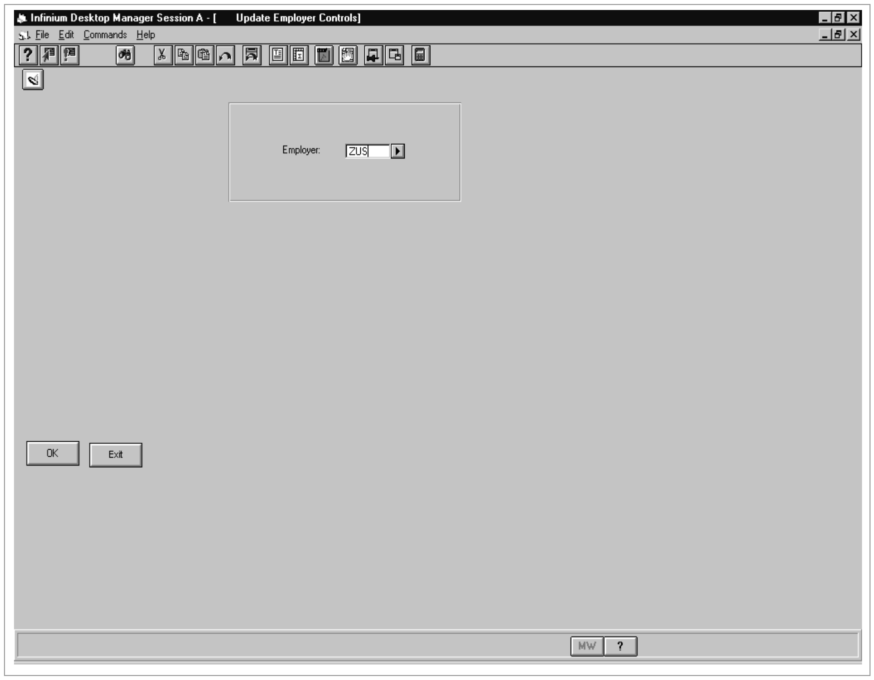


Figure 3: PY prompt screen

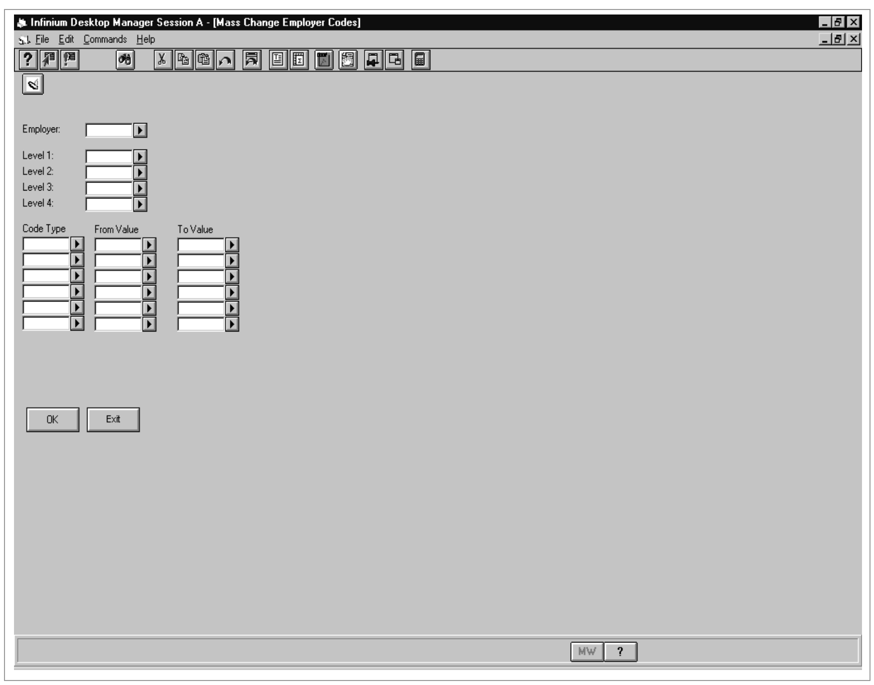


Figure 4: PY selection screen

Promptable Fields

A plus sign displayed next to a field indicates that you can choose your entry from a list of possible values. Place the cursor in the field and press F4 to display a list of values.

To select an entry perform one of the following:

- Position the cursor at the desired value, type `1` and press Enter.
- Type the value in the appropriate field.

Infinium Applications and Abbreviations

The following table lists Infinium names and the corresponding product abbreviations that are associated with this product.

Application	Abbreviation
Infinium Application Manager Infinium Application Manager Extended	Infinium AM Infinium AM/X
Infinium Query Infinium Query Extended	Infinium QY Infinium QY/X
Infinium Financial Management Suite	**Infinium FM**
Infinium General Ledger	Infinium GL
Infinium Payables Ledger	Infinium PL
Infinium Project Accounting	Infinium PA
Infinium Human Resources Suite	**Infinium HR**
Infinium Flexible Benefits	Infinium FB
Infinium Human Resources	Infinium HR
Infinium Human Resources/Payroll	Infinium HR/PY
Infinium Payroll	Infinium PY
Infinium Training Administration	Infinium TR

Related Documentation

For additional information about Infinium HR, refer to the following:

- *Infinium HR Guide to Controls*
- *Infinium HR Guide to Management Functions*

- *Infinium HR/PY Technical Guide*
- *Infinium HR Menu Tree*
- *Infinium HR/PY Reports Book*
- *Infinium HR/PY Conversion Workbook*
- *Infinium HR Guide to Setup and Processing for Benefits Administration*
- *Program Reference Guide*
- *File/Field Descriptions*
- *Database Relations*
- Online help

Installation instructions and release notes are available on the Infor Global Support Web site.

Notes

Chapter 1 Infinium HR: An Overview

1

This chapter provides you with an introduction to processing with Infinium HR.

The chapter consists of the following topics:

HR/PY Overview

The flowchart on the following page identifies key components of both Infinium HR and Infinium PY. Information that is shared between the two systems is positioned in the middle of the chart. Information that is unique to Infinium HR or Infinium PY is shown in the lower portion of the chart under each product heading. A brief description of the main Infinium HR components follows the overview chart.

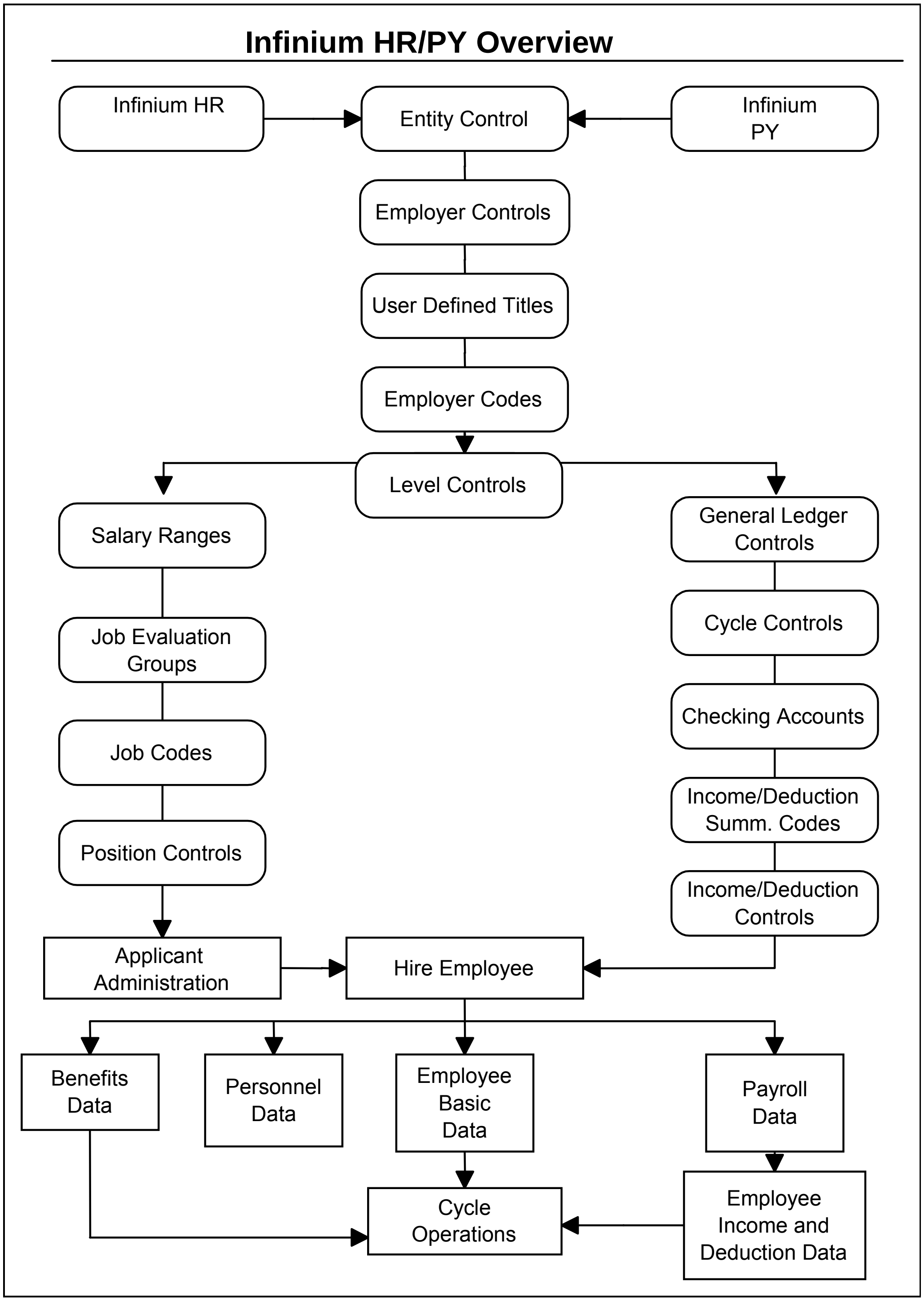


Figure 1-1: Infinium HR/PY Overview

Terminology and Concepts

This guide contains Infinium and Infinium HR terminology you should understand before you continue. These concepts are used throughout the entire Infinium HR system.

Entity Control

The entity control handles assignment of employee numbers, if you do not manually assign employee numbers, and displays the current Infinium HR/PY release number installed on your System i. You define only one entity control regardless of the number of employers you establish in your system.

Employer

You generally define an employer within Infinium HR/PY for each organization that has been assigned a unique federal tax identification number. However, Infinium PY allows you to establish U.S. employers with multiple federal tax identification numbers if this better satisfies your business needs. Multiple federal tax identification numbers for unemployment calculation purposes can be assigned to a single Canadian employer.

Code Types and Code Values

You identify each employer with a code of up to three letters or numbers. You type a name, address, telephone number, federal tax identification number, level descriptions, date format and various other information on the employer control record. The employer control is shared between the Infinium HR and Infinium PY systems.

The system uses the information you enter on the employer control for data entry, processing and report generation. For example, you specify which the date format you will use and whether you will use the employee's tax identification number as the employee number.

A code type is a table defined by Infinium. Each code type is assigned a three-character designator. For each code type, you develop a list of valid choices; these choices are called code values. The code types are used to validate information you type in some of the fields in employee records and for processing. For example, code type **STA** defines the state or province in which the employee resides. You define code values for this code type such as **NY** for New York, **CA** for California and **ON** for Ontario.

There are many code types in Infinium HR/PY. You use code types in both Infinium HR and Infinium PY; therefore, the values you define are shared with Infinium PY users. You define values for approximately 25 code types during the initial implementation of Infinium HR/PY. You define values for more code types as you implement additional functions of Infinium HR/PY.

Level Controls

You use level controls to define your corporate structure, generate general ledger numbers and control user access to employee records. You can define up to four reporting levels within each employer on Infinium HR/PY; you must define at least one level for each employer. Likewise, each employee must be assigned to at least one level.

You define levels with a code of up to 5 letters or numbers, and attach a description to each level code. The level structure is hierarchical. For example, a level structure might be as follows: Region is defined as level 1; within each region, you define division as level 2; within each division, you define department as level 3; and within each department you define cost center as level 4. Level controls are used in both Infinium HR and Infinium PY.

You use the position control record to assign employees to a set of levels when the employee is hired. You update the employee’s level assignment using the personnel actions of transfer, promotion, demotion and rehire.

Job Controls

You use the job control record to define a general category of work done across the organization. You define job controls with a code of up to 5 letters or numbers, and attach a description to each job control. For example, you can define a job code of **MGR** for manager and **CLRK** for clerk, or **100** for managers, **200** for supervisors, and so on.

You assign various attributes to each job control including a salary range, exempt/non-exempt status, EEO code, security group, pay grade and next performance review type. You give these attributes to each employee when the employee is assigned to a particular job code at new hire or when you change the employee's job assignment using personnel action transactions such as transfer, promotion, demotion and rehire. Payroll users can assign pay rates or general ledger numbers to job controls within Infinium PY.

Position Controls

You use the position control to locate an employee within your organization and define the work the employee performs. The position control is a further definition of the job control. You define position controls using up to six letters or numbers and attach a title and a set of levels to each position. For example, you can define **ACTMGR** for accounting manager and **HRMGR** for human resources manager or **100E01** for payroll manager and **100E02** for operations manager.

You assign various attributes to each position control including reporting levels, reports-to position, job control, location code, union code, workers' compensation code, labor code, season code, benefit group, position group and shift code. You also specify the number of employees or hours that can be assigned to each position for budgeting and headcount purposes. The position control is used only within Infinium HR.

You assign each employee to a position when the employee is hired and update the employee's position assignment using the transfer, promotion, demotion or rehire personnel actions.

Pay Grades

Pay grades are used in step-in-grade processing to automate the pay rate progression of employees based on their length of service, hours worked or a combination of both factors. You typically use step-in-grade processing to administer pay rates of union and public sector employees.

Applicant Tracking

You can use Infinium HR to track applicant information including skills, interviews and recruitment costs. You can utilize several convenient displays and reports including the Applicant Log. If you hire an applicant, you can use the applicant's information to expedite the hire process.

Hiring Employees

You can hire employees using Infinium HR or Infinium PY. Regardless of which system you use, you enter the same essential information required to establish and pay employees including the following:

- Basic Data
- Personnel Data
- Payroll Data
- Income Data
- Deduction Data

Maintaining Employee Information

You use the *Enter Personnel Actions* function in Infinium HR to update basic employee information and create unlimited on-line history transactions. You can use employee history displays and reports to analyze trends and better manage your employees.

Infinium HR Reporting

Infinium HR has a wide variety of standard reports that you can run at any time. Typically, you specify certain key selection criteria and press Enter to generate a report. You can also develop your own reports using Infinium QY.

Infinium HR also contains several statutory reports including the EEO-1 information, the EEO-4 information, and the Applicant Log. You can use Infinium HR to store and print US I-9 information and to create a file of information that you can download to a personal computer for Canadian employment equity reporting.

Benefits Administration

Infinium HR contains a module that allows you to set up and track employee benefit enrollments. You can generate benefit statements and print reports to track the cost of your organization’s benefit programs. Since Infinium HR and Infinium PY are integrated, you can pass benefits enrollment information from Infinium HR to Infinium PY to ensure correct withholding of benefit deductions from employee paychecks and correct tracking of employer liabilities. Infinium PY can pass benefit costs to Infinium GL for inclusion in your organization’s financial reports.

Conventions Used in Infinium HR

There are several conventions that are used throughout Infinium HR including those listed below.

System Names

In this guide and others, Infinium HR is sometimes referred to as **PE**. Infinium PY is sometimes referred to as **PY**. The combination of Infinium HR and Infinium PY is referred to as **HR**.

Update

Throughout Infinium HR, you use options that begin with *Update* to add, change or delete information in the system.

Display

Throughout Infinium HR, you use options that begin with *Display* to view information in the system. You cannot use display options to add, change or delete information.

List

Throughout Infinium HR, you use options that begin with *List* to generate standard reports of information in the system. You generally use a selection screen to identify the information you want to include on the report.

You use options on various operating system screens to view and print your reports. For example, you can press F14 from the Infinium HR main menu to access the Work with Submitted Jobs screen. You use options on this screen to display and print the spooled files that contain your reports. Refer to information about your operating system for detailed instructions on how to view and print your reports.

Default

A default is a value that the system automatically assigns or an action that the system automatically takes. Some default values and actions are pre-defined by Infinium; others are defined by users as they set up Infinium HR. Default values are generally entered on control screens.

Quick Access

On most screens in Infinium products, including Infinium HR, you can press F10 to display a pop-up window that allows you to go to another function without first returning to the product's main menu. You enter a pre-defined Quick Access code for the function that you want to access. This timesaving feature allows you to move rapidly throughout the systems to which you are authorized.

You can use Quick Access codes to move to functions within Infinium HR or to a function in any other system to which you are authorized. Quick Access codes are displayed in brackets following all menu functions listed in this guide.

Prompting

Throughout all Infinium products, including Infinium HR, when you place your cursor on any field that displays **+**, you can press F4 or click on the F4 button to display a list of valid values for that field. You can select a value from the list by typing any character in the *Opt* field next to the value you want to use, then pressing Enter. The system returns to the field your cursor was in when you prompted and automatically fills it with the value you selected.

System Help

Infinium provides four levels of help for all products including Infinium HR. You can press Help on any field in Infinium HR. The system first displays field help for the specific field your cursor was in when you accessed the help system.

If you press Enter on the field help screen, the system next displays screen help. Screen help provides you with information concerning the purpose of the screen you are completing.

If you press Enter on the screen help screen, the system next displays function key help. Function key help provides you with an overview of the functions performed by function keys for the screen you are using.

If you press Enter on the function key help screen, the system next displays function help. Function help provides you with an overview of the entire function you are using.

If you press Enter again, the system returns to the field from which you accessed Help.

In addition to the four levels of standard system help text, you can also enter up to four levels of your own user-defined help text. When you enter your own help text, the system displays it before it displays standard system help text. See *Getting Around the Deskop* for details.

Notes

Chapter 2 Working with Applicant Information

2

This chapter discusses working with applicant information. You can update applicant position information you transfer from another applicant tracking information or you can create new applicant information. You can track basic information, skills, and educational achievements of applicants for employment at your company.

The chapter consists of the following topics:

Overview

In this chapter you learn how to use the *Applicant Administration* function to track basic information, skills, and educational achievements of applicants for employment at your company. In addition, you learn how to track employment interviews and recruiting costs.

After you create applicant information, you can display it on screens or print it on reports. You can use combinations of many different selection criteria, including the applicant's name, application date, applied-for positions and skills to display or print applicant information. The "Displaying and Printing Applicant Data" chapter provides you with information on how to use the displays and reports.

When you are ready to hire an applicant, you can expedite the new hire process by using the applicant record to help create the new employee record. You can keep your applicant database current and compact by deleting individual applicant records or purging large groups based on selection criteria such as application date or applied-for position.

Objectives

After you complete this chapter you should be familiar with how to:

- Create applicant administration code values
- Enter a new applicant record
- Record interview data for the applicant
- Record recruitment costs for the applicant

Defining Code Values

You use values associated with the code types described in the table below to create and maintain applicant records. You define values using letters, numbers or any combination of letters and numbers. The system normally allows you to define values of up to five characters in length; exceptions to this standard are noted in the descriptions of fields below. See the *Infinium HR Guide to Controls* for details on how to establish employer code values.

Since none of the fields in the applicant record that use these code values are required, you can define values for those codes that will be the most helpful to you in fulfilling your business requirements.

Code Type	Code Type Description	Sample Code Values	Code Value Description
ACT	Application Action	HOLD INTER	Hold for future Schedule Interview
CLR	Security Clearance	FULL RES	Full Restricted
CNT	County	LA COOK	Los Angeles Cook
CST	Cost Transaction	MEALS AIR	Meals Airfare
EDU	Education	B.S. TRADE	Bachelor of Science Trade School
HDC	Handicap	01 02	Hearing Impaired Legally Blind
HIR	Applicant/Hire Source	AD REF	Advertisement Employee Referral
INV	Interview Result	PEND REJ1	Send Pending Letter Send Reject Letter #1
LNG	Language	SPAN ASL	Spanish American Sign Lang.
MDC	Military Discharge Type	HON DIS	Honorable Dishonorable
MIL	Military Veteran Status	ACT RES	Active Reserves

Code Type	Code Type Description	Sample Code Values	Code Value Description
MLB	Military Branch	ARMY USMC	Army Marine Corps
REL	Dependent relationship	BRO PAR	Brother Parent
RLO	Relocation	UNRES NE	Unrestricted Will relocate to NE
SKL	Skill	COMP MECH	Computer Mechanical
TID	ID Type	05 15	Macau resident Macau non-resident
TSK	Task	WP AUTO	Word Processing Car Repair
TST	Skill Test	TYPE PHYS	Typing Test Physical Ability Test
VIA	Visa Type	J1 PRV	Student Permanent Resident
WRE	Work Restrictions	BACK NONE	Bad Back No Restrictions

You also use values associated with these code types previously discussed in the *Infinium HR Guide to Controls:*

- CTR Country
- ETH Ethnic
- STA Residence State

Creating a New Applicant Record

Use the *Update Applicant Data* function to create applicant information, as required. The following information includes:

- Basic applicant
- Information about positions for which the applicant applied
- Dependent
- Employed relatives
- Local payroll
- Education
- Job training
- Local data

You must create the applicant record before you can record interview results and recruitment costs. You can assign the applicant to one or more positions and to one or more skills. See the *Infinium HR Guide to Controls* for details on how to create position controls.

When you hire an applicant, you can type the applicant name on the prompt screen of the *Enter New Hire* function. The system automatically brings most of the information from the *Update Applicant Data* function into the new employee record. Exceptions are noted below. If necessary, you can change applicant data as you create the new hire record.

After you hire the applicant, the applicant's record remains in the applicant administration file. Therefore all applicants, both hired and not hired, can be included in applicant reports.

Creating Applicant Data

To create a new applicant record complete the steps below.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data*.

3 Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-1.

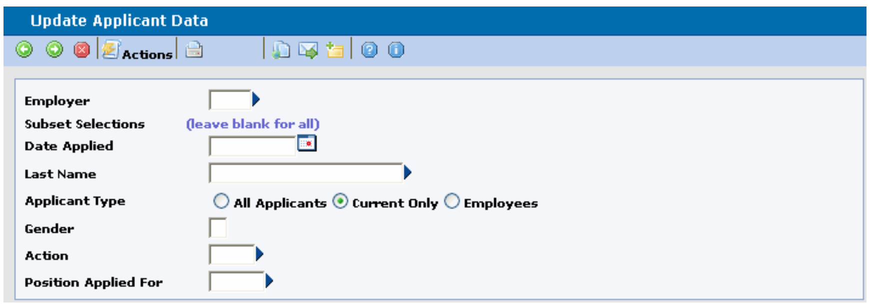


Figure 2-1: Update Applicant Data prompt page

4 Use the information below to complete this page.

Employer

Specify the employer.

Date Applied

Specify the date of application to limit the selection of applicants to those with that date of application. Otherwise, leave blank.

Last Name

Specify a last name or type the beginning characters of the last name of the applicant to limit the selection of applicants to those with or beginning with that last name. Otherwise, leave blank.

Applicant Type

Specify whether to include all applicants, only current applicants, or applicants who are now employees.

Gender

Specify the gender to include only applicants of that gender. Valid values:

M	Male
F	Female

Otherwise, leave blank.

Action

Specify an action value to select only applicants associated with that value. Otherwise, leave blank.

This value is associated with ACT, Application Action code.

Position Applied For

Specify the value for the position applied for to select only applicants who applied for that position. Otherwise, leave blank.

5 Click Next. The system displays a page similar to Figure 2-2.

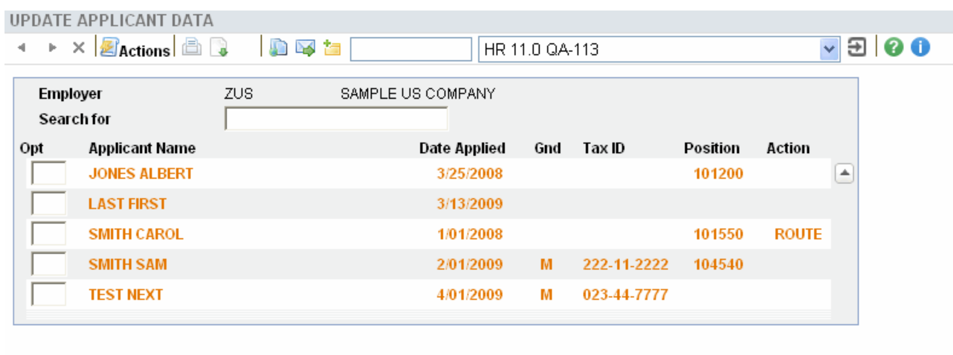


Figure 2-2: Update Applicant Data selection page

On this page you can:

- Change applicant information by selecting **Change** next to the record.
- Delete applicant information by selecting **Delete** next to the record.
- Update application information by selecting **Position Applications** next to the record.
- Update education information by selecting **Education** next to the record.
- Update job training information by selecting **Job Training** next to the record.

- Update dependent information by selecting **Dependents** next to the record.
- Update information about relatives who are employed at this employer by selecting **Relatives Employed** next to the record.
- Update alternate name and address information by selecting **Alt. Name - Address** next to the record.
- Update alternate payroll and ID information by selecting **Alt. PY/ID** next to the record.
- Create a new applicant record by selecting **Create**.

6 Select **Create**. The system displays a page similar to Figure 2-3.

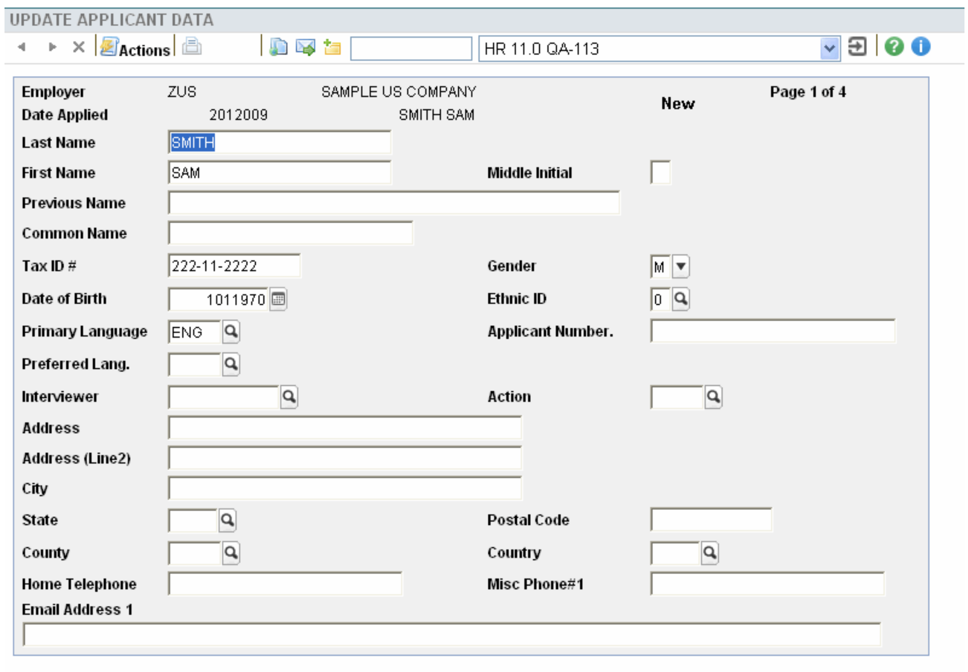


Figure 2-3: Update Applicant Data page

7 Use the information below to complete this page.

Date Applied

Specify the date of the application.

Last Name

Type the applicant’s last name.

First Name

Type the applicant’s first name.

Middle Initial

Type the applicant’s middle initial.

Previous Name

Type the applicant’s previous name, such as a maiden name.

Common Name

Type the name most used by the employee, such as a nickname or preferred name.

Tax ID #

Type the applicant’s tax ID. This can be the applicant’s social security number. You can modify this field only if the value in the *Tax ID Access* field for your user on the Update User Security Sensitive Data Access screen is **SHOWALL** or if the value on the Update User Security Sensitive Data Access screen is blank for your user but the value on the Update Entity Controls Sensitive Data screen is **SHOWALL**.

Gender

Specify the applicant’s gender. Valid values:

M	Male
F	Female

Date of Birth

Specify the date of birth of the applicant. Use the format indicated in Update Employer Control; **MDY**, **DMY**, or **YMD**.

A warning occurs for dates in the 21st century. Validate the accuracy of the date of birth.

Ethnic ID

Specify the value that identifies the ethnic code for this applicant.

Use code type ETH to define values for this field. Use the *Update Employer Controls* function to create valid codes values.

Primary Language

Specify the value that represents the applicant's primary language. Use code type LNG to define values for this field. This language is used in the personnel data record after the applicant is hired.

Preferred Language

Specify the language the applicant prefers to use. Use code type LNG to define values for this field. This language is used in the basic data record after the applicant is hired.

Applicant Number

Type a reference number for this applicant, if the information is sent from a non-Infinium system such as a Vurv application and the other system assigns a reference number to the applicant.

Interviewer

Specify the person who interviewed this applicant and entered the applicant's personal information.

Action

Specify the value that represents the action to take for this applicant. Use code type ACT to define values for this field.

Address

Type the applicant's street address.

Address (Line 2)

Type the second line of the applicant's address.

City

Type the applicant's city of residence.

State

Specify the applicant's state of residence.

County

Specify the applicant's county of residence.

Postal Code

Type the applicant's postal code.

Home Telephone

Type the applicant's home phone number.

Misc Phone#1

Type another phone number for the applicant.

Email Address 1

Type the applicant's e-mail address.

8 Click **Next**. The system displays a page similar to Figure 2-4.

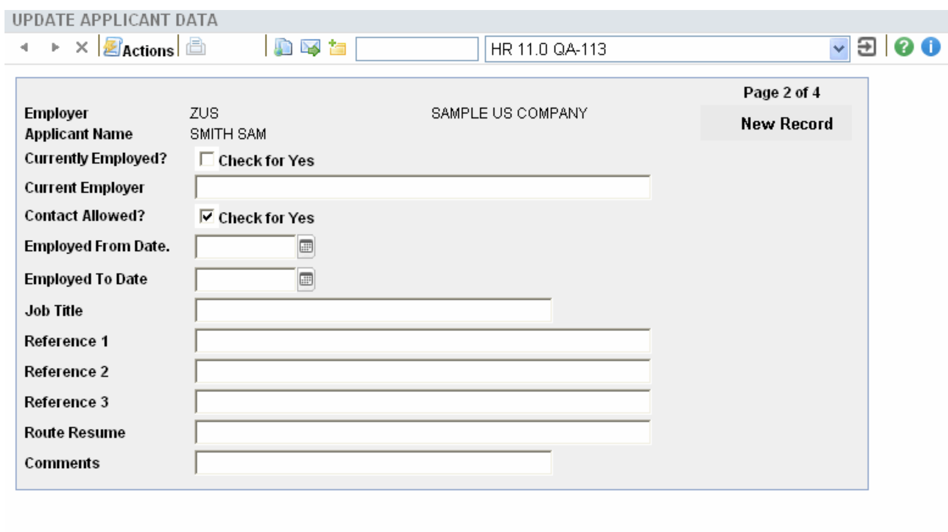


Figure 2-4: Update Applicant Data employment information page

9 Use the information below to complete this page.

Currently Employed?

Specify yes to indicate this applicant Is currently employed. Otherwise, specify no.

Current Employer

Type the name of the applicant's current employer. If you also type a date in the *Employed From Date* field, a record is created in the Prev. Employment History file when the applicant is hired.

Contact Allowed?

Specify yes if the applicant authorized permission to contact the applicant's employer. Otherwise, specify no.

Employed From Date.

Specify the date the applicant began working for the current or previous employer. If you also type a value in the *Current Employer* field, the system creates a record in the Prev. Employment History file when the applicant is hired.

Employed To Date

Specify the date the applicant stopped working for the previous employer. If you also type a value in the *Current Employer* and *Employed From Date* fields, the system creates a record in the Prev. Employment History file when the applicant is hired.

Job Title

Type the applicant's job type, job title, or role in the current or previous job.

Reference 1

Type the name of a personal reference for the applicant.

Reference 2

Type the name of a personal reference for the applicant.

Reference 3

Type the name of a personal reference for the applicant.

Route Resume

Type the names of the persons to whom you plan to provide résumé information about this applicant.

Comments

Type additional information about the applicant.

10 Click Next. The system displays a page similar to Figure 2-5.

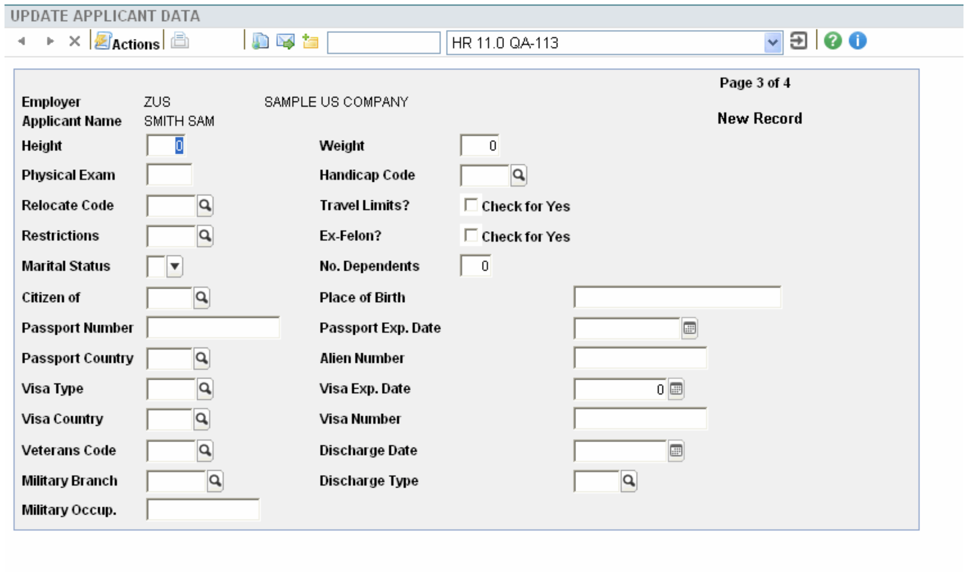


Figure 2-5: Update Applicant Data page

11 Use the information below to complete this page.

Height

Type the height of this applicant using inches or centimeters.

Weight

Type the weight of this applicant.

Physical Exam

Use this field to record whether a physical exam is required for this applicant, or what type of exam is required.

Handicap Code

Specify the value that indicates if the applicant has any physical disabilities. You define values for this field using code type HDC.

Relocate Code

Specify the value that represents the relocation preference of this applicant. You define values for this field using code type RLO.

Travel Limits?

Specify yes if this applicant is available to travel. Otherwise, specify no.

Restrictions

Specify the value that indicates whether the applicant has any physical restrictions on the type of work he or she can perform if hired. You define values for this field using code type WRE.

Ex-Felon?

Specify yes if the applicant has stated he or she has been previously convicted of a crime. Otherwise, specify no.

Marital Status

Specify the employee's actual marital status: Valid values:

M	Married
S	Single
D	Divorced
W	Widowed
P	Separated
O	Other

No. Dependents

Type the number of dependents for this applicant.

Citizen of

Type the value that represents the country where this applicant is a citizen. You define values for this field using code type CTR.

Place of Birth

Type the name of the city, state/province, or country where this applicant was born.

Passport Number

Type the applicant’s passport number, if applicable.

Passport Exp. Date

Specify the expiration date of the applicant’s passport, if applicable.

Passport Country

Specify the country that issues the applicant's passport.

Alien Number

Type the alien registration number of this applicant.

Visa Type

Type the value that represents the type of visa possessed by this applicant. You define values for this field using code type VIA.

Visa Exp. Date

Specify the date on which this applicant's visa expires.

Visa Country

Specify the value that represents the country that issued this applicant's visa. You define values for this field using code type CTR.

Visa Number

Type the number assigned to this applicant's visa.

Veterans Code

Specify the value that represents the veteran status or category of this applicant, for example, the applicant is a military veteran or is in the military reserves. You define values for this field using code type MIL.

Discharge Date

Specify the date this applicant was discharged from military service.

Military Branch

Specify the value that represents the branch of the military in which this applicant served. You define values for this field using code type MLB.

Discharge Type

Type the value that represents the kind of military discharge given this applicant. You define values for this field using code type MDC.

Military Occup.

Type the position or duty this applicant performed while in the military service.

12 Click **Next**. The system displays a page similar to Figure 2-6.

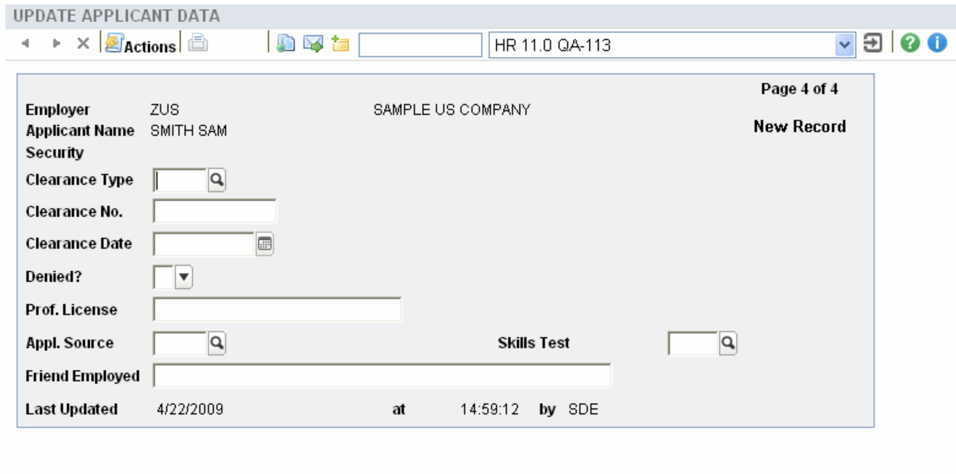


Figure 2-6: Update Applicant Data security information page

13 Use the information below to complete this page.

Clearance Type

Specify the value that represents the security clearance this applicant obtained in previous employment. You define values for this field using code type CLR.

Clearance No.

Type the clearance number this applicant has obtained in previous employment.

Clearance Date.

Specify the date this applicant obtained security clearance.

Denied?

Specify whether this applicant was denied a security clearance in his or her previous employment. Valid values:

0	No
1	Yes

Prof. License

Type the license(s) that this applicant has obtained.

Appl. Source

Specify the value that represents the recruitment source of this applicant. You define values for this field using code type HIR.

Skills Test

Specify the value that identifies whether you require this applicant to take a pre-employment skills test or the value that identifies the type of skills test that you require. You define values for this field using code type TST.

Friend Employed

Type the name of the friend of this applicant that works for the hiring employer.

14 Click Next.

15 Click Exit and Save to return to the Update Applicant Data selection page.

16 Click Exit twice to return main menu.

Updating position application information

Complete the steps below to update job application information.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-7.

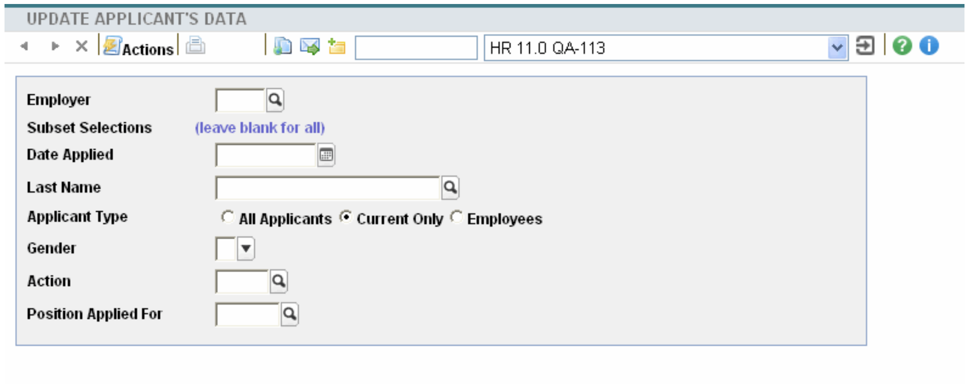


Figure 2-7: Update Applicant Data prompt page

4 Use the information in the “Creating Applicant Data” section to complete this page.

5 Click **Next**. The system displays a page similar to Figure 2-8.

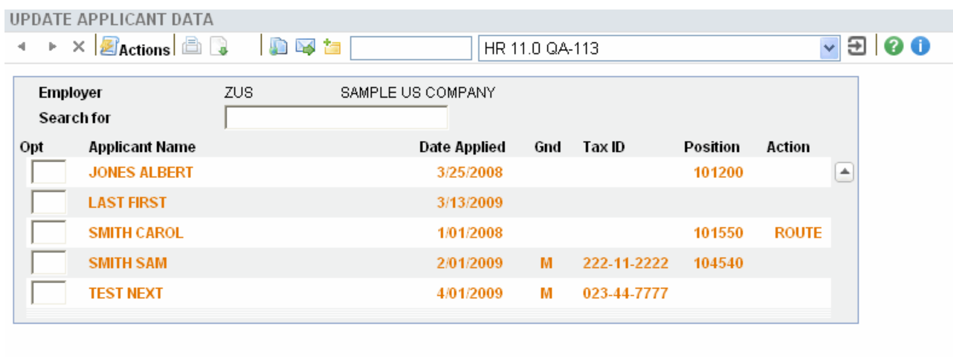


Figure 2-8: Update Applicant Data selection page

6 Select **Position Applications** next to the record for which you want to update application information. The system displays a page similar to Figure 2-9.

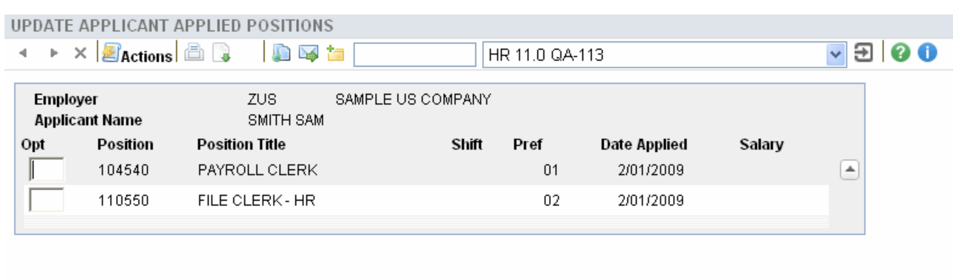


Figure 2-9: Update Applicant Applied Positions page

On this page, you can:

- Delete the record by selecting **Delete** next to the record.
- Change the record by selecting **Change** next to the record.
- Create a new record by clicking **Create**.

7 Select **Change**. The system displays a page similar to Figure 2-10.

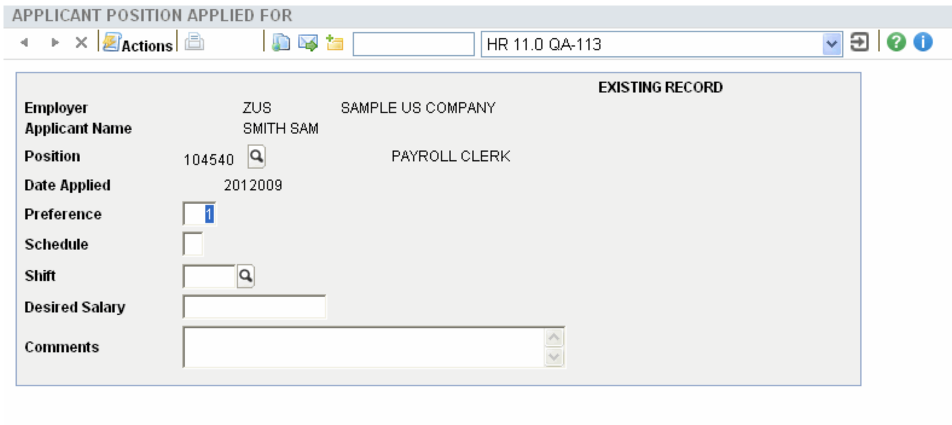


Figure 2-10: Applicant Position Applied For page

Use this page to identify the positions in which an applicant has expressed interest or for which the applicant is qualified. You can specify the applicant's priority for these positions. The position information provides the ability to identify a pool of applicants for a specific opening.

8 Use the information below to complete his page.

Position

Type the value that identifies the position in which an applicant has expressed interest or for which he or she is qualified.

Date Applied

Specify the date this applicant applied for this position.

Preference

Type the applicant's priority for this position. Use **00** through **99**.

Schedule

Type a code that identifies the schedule preferred by this applicant. For example, you can type **W** to indicate that an applicant prefers a weekend schedule or **3** to indicate that he or she wants to work only three days a week.

Shift

Specify the value that represents the shift this applicant prefers. You define values for this field using code type SFT. The system can use the values you define for this code type to calculate premium pay for employees.

Desired Salary

Type the salary amount this applicant wants to earn.

Comments

Type a comment for this applicant and position.

9 Click **Exit**.

10 Select **Exit and Save** to save your changes and return to the Update Applicant Data selection page.

11 Click **Exit** twice to return to the main menu.

Updating education information

Complete the steps below to update an applicant's education information.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-11.

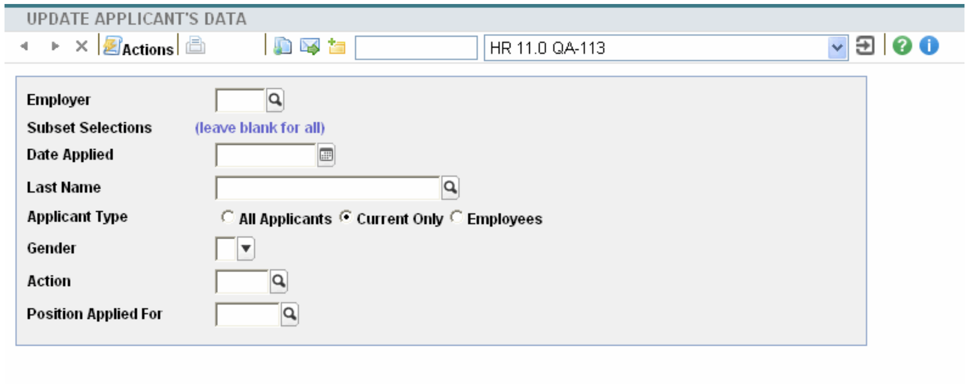


Figure 2-11: Update Applicant Data prompt page

4 Use the information in the “Creating Applicant Data” section to complete this page.

5 Click Next. The system displays a page similar to Figure 2-12.

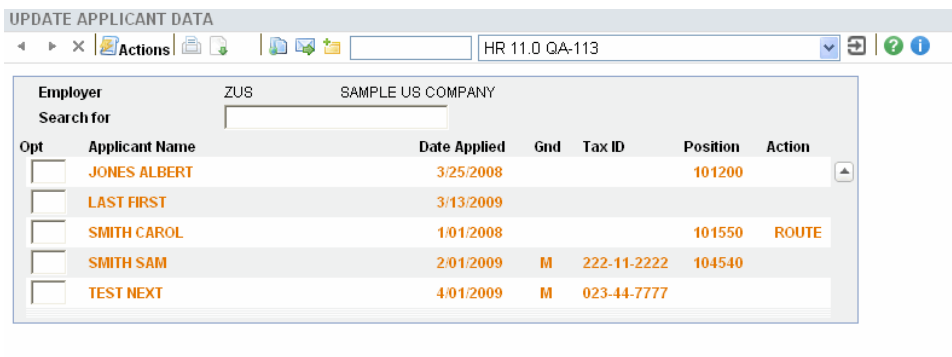


Figure 2-12: Update Applicant Data selection page

6 Select **Education** next to the record for which you want to update application information. The system displays a page similar to Figure 2-13.

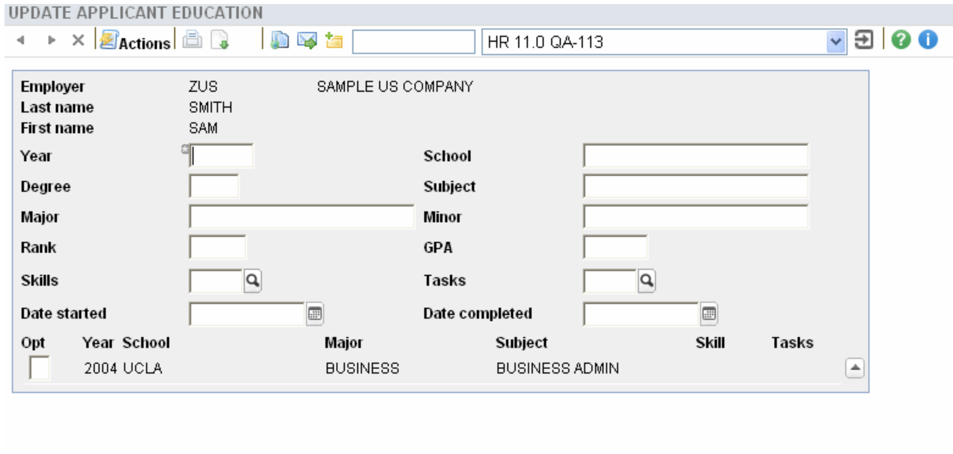


Figure 2-13: Update Applicant Education page

Use this page to record the applicant’s educational accomplishments and skills.

On this page you can:

- Update the specified applicant’s education information by selecting **Change** next to the record.
- Delete the specified applicant’s education information by selecting **Delete** next to the record.
- Create new education information by completing this page.

7 Use the information below to complete this page.

Year

Type the year this applicant obtained his or her degree or skill. You must enter a value in this field to record applicant education or skills information on this page.

School

Type the name of the school this applicant attended or from which this applicant graduated. If you type information in this field, you must also type information in the *Subject* or *Major* fields.

Degree

Type the degree obtained by this applicant. For example, you can type **MBA** to indicate that the applicant possesses a Master’s degree in Business Administration or **HS** to indicate that the applicant obtained a high school diploma.

Subject

Type the subject that the applicant studied.

Major

Type the academic major of this applicant.

Minor

Type the academic minor of this applicant.

Rank

Type the academic class ranking of this applicant.

GPA

Type the grade point average of this applicant.

Skills

Type the value that identifies the skill this applicant possesses. You define values for this field using code type SKL. If you use this field, you must also type information in the *Tasks* field.

Tasks

Type the value that identifies the task this applicant can perform; generally, the task is related to the skill specified above. You define values for this field using code type TSK.

Date started

Type the date this applicant entered school or first acquired a skill.

Date completed

Type the date this applicant completed his or her education or mastered a skill.

8 Click **Enter**.

9 Click **Exit** three times to return to the HR main menu.

Updating applicant job training information

Complete the steps below to update an applicant's education information.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-14.

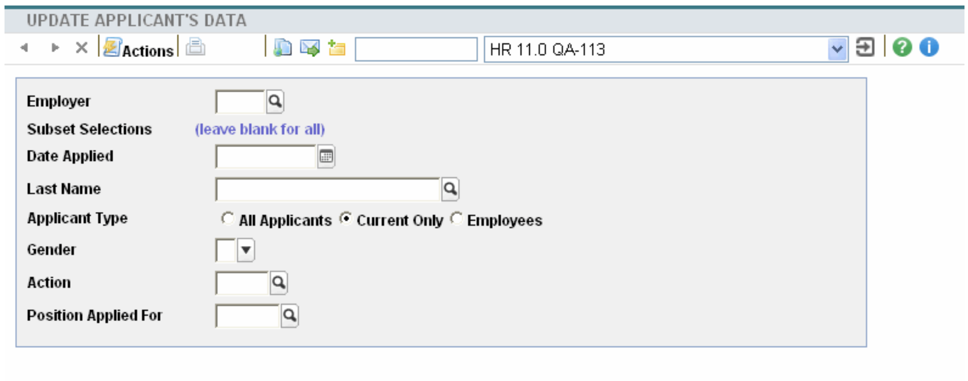


Figure 2-14: Update Applicant Data prompt page

4 Use the information in the "Creating Applicant Data" section to complete this page.

5 Click **Next**. The system displays a page similar to Figure 2-15.

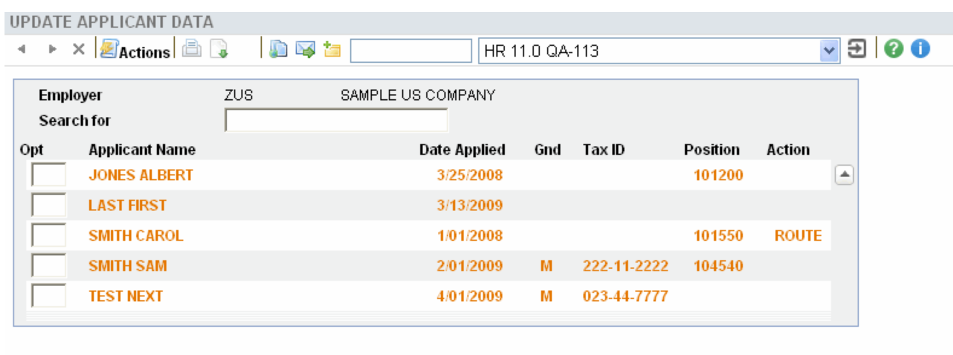


Figure 2-15: Update Applicant Data selection page

6 Select **Job Training** next to the record for which you want to update application information. The system displays a page similar to Figure 2-16.

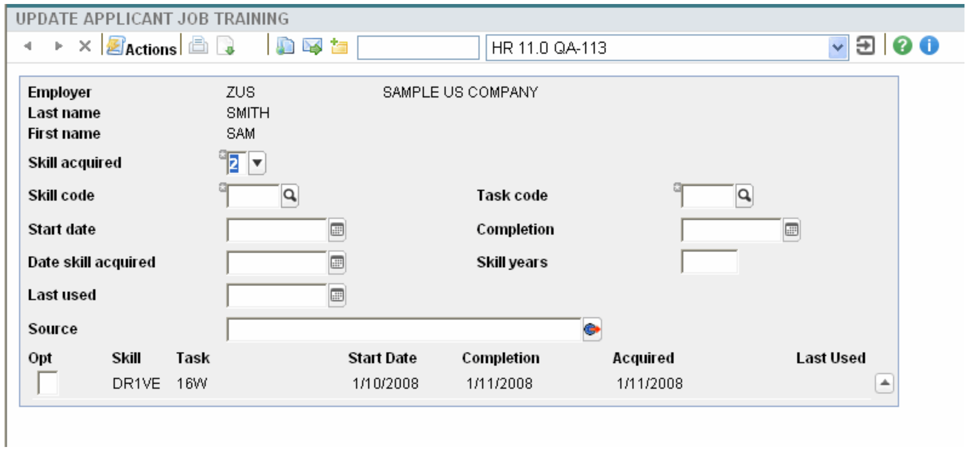


Figure 2-16: Update Applicant Job Training page

Use this page to record skills and related tasks for this applicant. When you hire the applicant, all of the information on this screen transfers to the new employee's on-the-job-training data record.

On this page you can:

- Update the specified applicant's job training information by selecting **Change** next to the record.
- Delete the specified applicant's job training information by selecting **Delete** next to the record.
- Create new job training information by completing this page.

7 Use the information below to complete this page.

Skill acquired

Use this field to indicate how this applicant obtained skills or training. You normally use the values for internal or external training for employees, not applicants. The default value is **2**. Valid values:

0	Internal training
1	External training
2	Pre-employment

Skill code

Type the value that identifies the skill this applicant possesses. You define values for this field using code type SKL. If you use this field, you must also type information in the *Task Code* field.

Task code

Type the value that identifies the task(s) this applicant can perform; generally the task is related to the skill typed above. You define values for this field using code type TSK.

Start date

Type the date this applicant started training on the skill specified above.

Completion

Type the date this applicant completed training on the skill specified above.

Date skill acquired

Type the date this applicant acquired the skill specified above.

Skill years

Type the number of years this applicant has possessed the skill specified above.

Last used

Type the most recent date this applicant used the skill specified above.

Source

Type the source of this applicant's training on the skill specified above; typically this is the applicant's current or prior employer(s).

8. Click **Enter**.

9. Click **Exit** three times to return to the HR main menu.

Updating an applicant's dependent information

Complete the steps below to update an applicant's dependent information.

1. From the Infinium HR main menu select *Applicant Administration*.

2. Select *Update Applicant Data.*

3. Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-17.

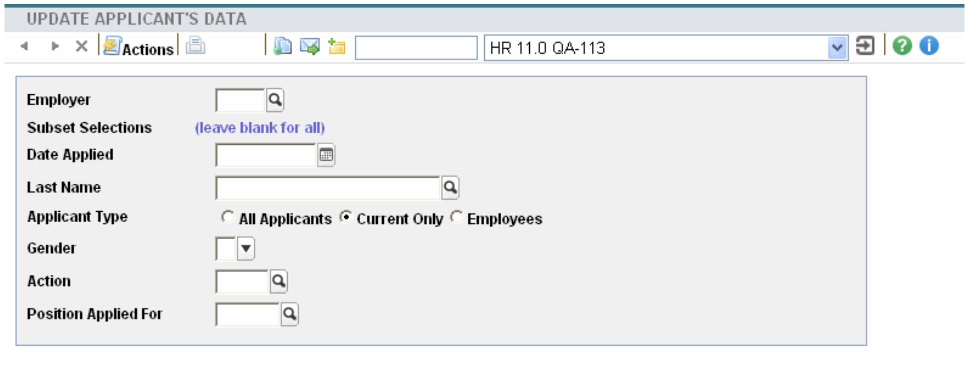


Figure 2-17: Update Applicant Data prompt page

4 Use the information in the “Creating Applicant Data” section to complete this page.

5 Click **Next**. The system displays a page similar to Figure 2-18.

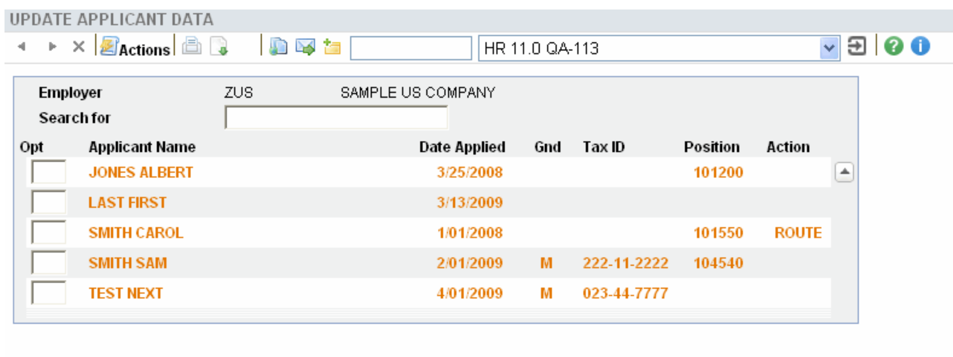


Figure 2-18: Update Applicant Data selection page

6 Select **Dependents** next to the record for which you want to update application information. The system displays a page similar to Figure 2-19.

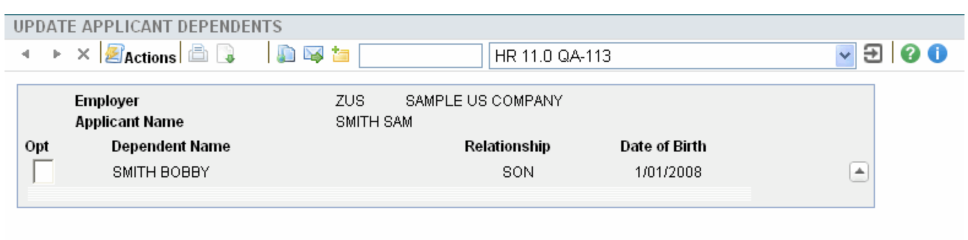


Figure 2-19: Update Applicant Dependents selection page

On this page you can:

- Change an applicant’s dependent information by selecting **Change** next to the record.
- Delete an applicant’s dependent information by selecting **Delete** next to the record.
- Create new dependent information for the applicant by clicking **Create** from Actions.

7 Select **Change** next to the record to update. The system displays a page similar to Figure 2-20.

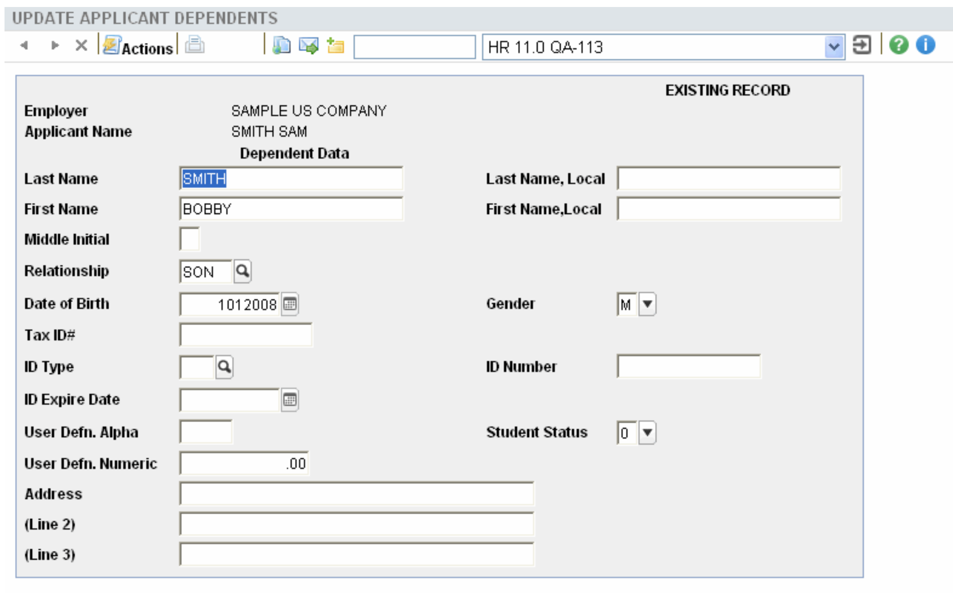


Figure 2-20: Update Applicant Dependents page

8 Use the information below to complete this page.

Last Name

Type the dependent’s last name.

Last Name, Local

Type the dependent’s local last name. This field usually contains the dependent name in a separate language such as Chinese, when applicable.

First Name

Type the dependent’s first name.

First Name, Local

Type the dependent's local first name. This field usually contains the dependent name in a separate language such as Chinese, when applicable.

Middle Initial

Type the dependent's middle initial.

Relationship

Specify the value that represents the relationship code for this dependent. This value is associated with the REL code type.

Date of Birth

Specify the dependent's date of birth. If this field is displayed in reverse image, the date of birth is in the twenty-first century. Validate the accuracy of the birth date.

Gender

Specify the sex of the dependent. Valid values:

M	Male
F	Female
U	Unknown

Tax ID#

Type the tax ID of the dependent, if applicable.

ID Type

Specify the value that represents the dependent's ID type. This value is associated with code type TID.

ID Number

Type the ID number for the dependent.

ID Expire Date

Specify the expiration date of the ID number for the dependent.

User Defn. Alpha

Type user-defined alphabetical information you want to store for association with a dependent record. You can use this information with custom programs and queries.

Student Status

Specify whether this dependent is a student and if so, whether this dependent is full time or part time. Valid values:

0	The dependent is not a student.
1	The dependent is a full time student.
2	The dependent is a part time student.
Blank	Unknown

User Defn. Numeric

Type user-defined numerical information you want to store for association with a dependent record. You can use this information with custom programs and queries.

Address

Type the first line of the dependent's address.

(Line 2)

Type the second line of the dependent's address.

(Line 3)

Type the third line of the dependent's address.

9. Click **Exit**.
10. Select **Exit and Save** to save your changes and return to the Update Applicant Dependents selection page.
11. Click **Exit** three times to return to the main menu.

Updating information about applicant relatives who are employed

Complete the steps below to update information about applicant relatives who are employed by the same employer to whom the applicant is applying for a job.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-21.

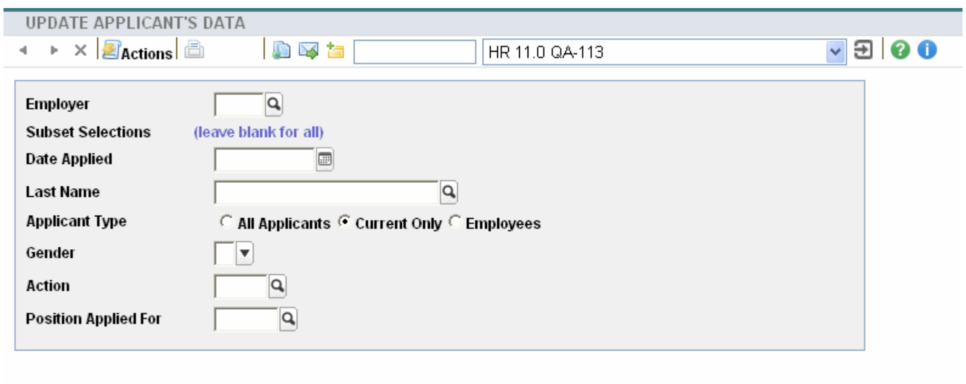


Figure 2-21: Update Applicant Data prompt page

4 Use the information in the "Creating Applicant Data" section to complete this page.

5 Click **Next**. The system displays a page similar to Figure 2-22.

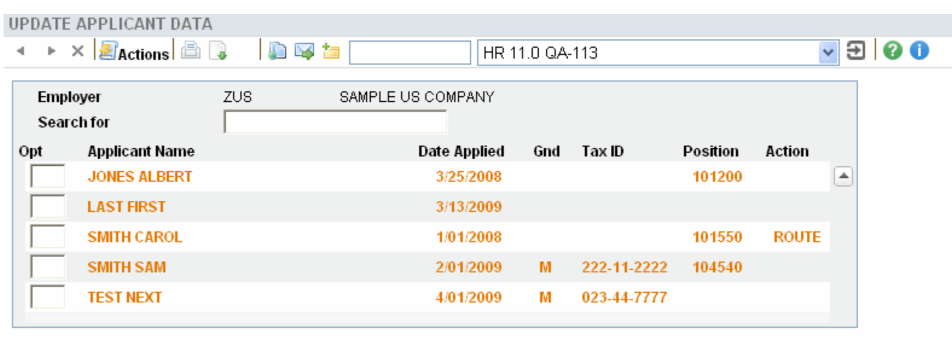


Figure 2-22: Update Applicant Data selection page

6 Select **Relatives Employed** next to the record you want to update. The system displays a page similar to Figure 2-23.

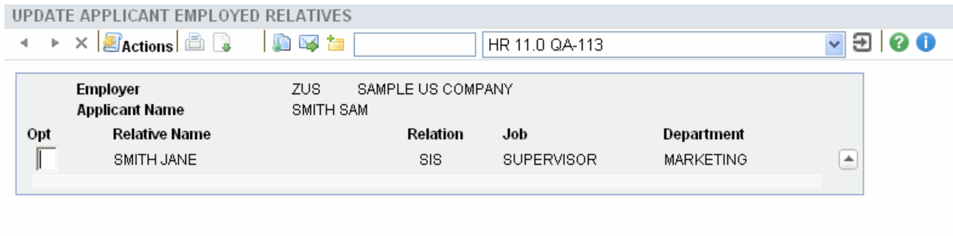


Figure 2-23: Update Applicant Employed Relatives selection page

On this page you can:

- Change an applicant's employed relatives' information by selecting **Change** next to the record.
- Delete an applicant's employed relatives' information by selecting **Delete** next to the record.
- Create a new record for an applicant's employed relative by clicking **Create**.

7 Select **Change** next to a record to update. The system displays a page similar to Figure 2-24.

Figure 2-24: Update Applicant Employed Relative page

8 Use the information below to complete this page.

Last Name

Type the employed relative's last name.

Last Name, Local

Type the employed relative’s local last name. This field usually contains the name in a separate language, such as Chinese, when applicable.

First Name

Type the employed relative’s first name.

First Name, Local

Type the employed relative’s local first name. This field usually contains the name in a separate language, such as Chinese, when applicable.

Relationship

Specify value that represents the relative’s relationship with the applicant. This value is associated with the REL code type.

Employed in Job

Type the job that the relative holds.

Employed in Dept

Type the department where the relative works.

9 Click **Exit**.

10 Select **Exit and Save** to save your changes and return to the Employee Relatives selection page.

11 Click **Exit** three times to return to the main menu.

Updating applicant alternate name and address information

Generally, you use this screen to enter applicant name and address information in a separate language such as Chinese.

Complete the steps below to update applicant local information.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant’s Data* [PEMFI030]. The system displays a page similar to Figure 2-25.

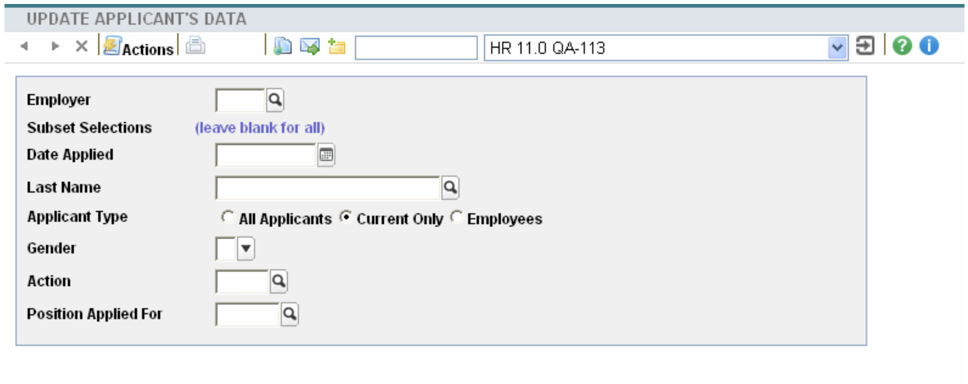
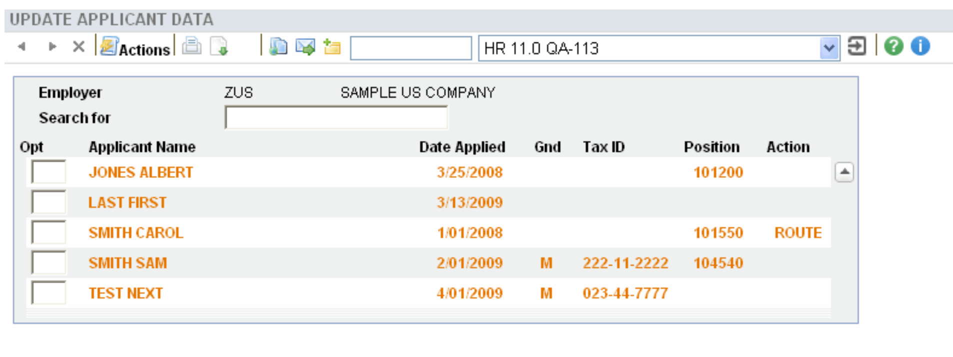


Figure 2-25: Update Applicant Data prompt page

4 Use the information in the “Creating Applicant Data” section to complete this page.

5 Click Next. The system displays a page similar to Figure 2-26.



Opt	Applicant Name	Date Applied	Gnd	Tax ID	Position	Action
	JONES ALBERT	3/25/2008			101200	
	LAST FIRST	3/13/2009				
	SMITH CAROL	1/01/2008			101550	ROUTE
	SMITH SAM	2/01/2009	M	222-11-2222	104540	
	TEST NEXT	4/01/2009	M	023-44-7777		

Figure 2-26: Update Applicant Data selection page

6 Click **Alt. Name & Address** next to the record. The system displays a page similar to Figure 2-27.

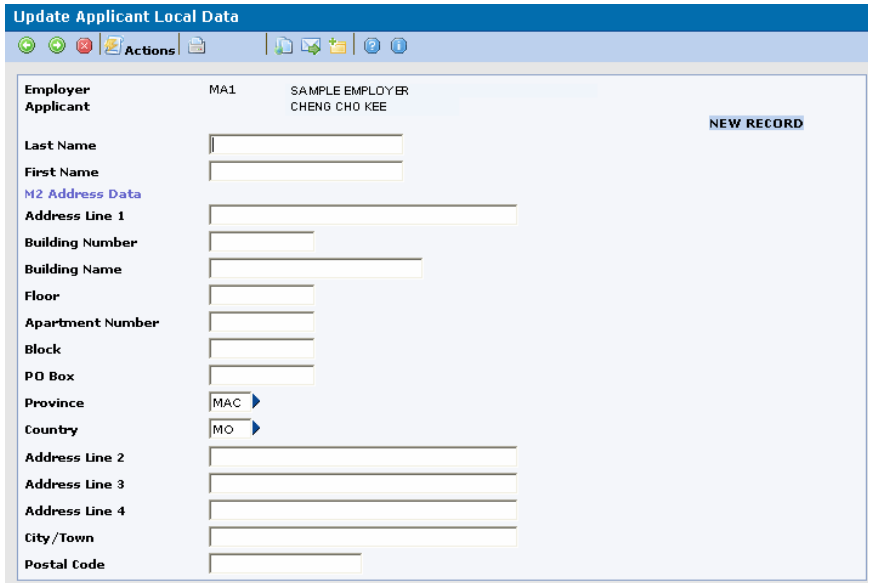


Figure 2-27: Update Applicant Local Data page

7 Use the information below to complete this page.

Last Name

Type the employee's last name.

First Name

Type the employee's first name.

Address Line 1

Type the first address line of this employee's address as it will be reported on the M2.

Building Number

Type the building number of this employee's address as it will be reported on the M2.

Building Name

Type the building name of this employee's address as it will be reported on the M2.

Floor

Type the floor of this employee's address as it will be reported on the M2.

Apartment Number

Type the apartment number of this employee's address as it will be reported on the M2.

Block

Type the block location of this employee's address as it will be reported on the M2.

PO Box

Type the post office box of this employee's address as it will be reported on the M2.

Province

Specify the province of this employee's address as it will be reported on the M2. The system uses the value in this field to determine what information is in the M2 boxes for Macau, Taipa, or Coloane.

Country

Specify the country of this employee's address.

Address Line 2, 3, 4

Specify the country of this employee's address as it will be reported on the M2. Type address lines 2, 3, or 4 of this employee's address.

City/Town

Type the city or town of this employee's address, if applicable.

Postal Code

Type the postal code of this employee's address.

8. Select **Exit and Save** to save your changes and return to the Update Applicant Data selection page.

9. Click **Exit** twice to return to the main menu.

Updating applicant alternate payroll and ID information

Use these pages to enter alternate payroll and ID information for a foreign country such as Macau.

Complete the steps below to update applicant ID information.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant's Data* [PEMFI030]. The system displays a page similar to Figure 2-28.

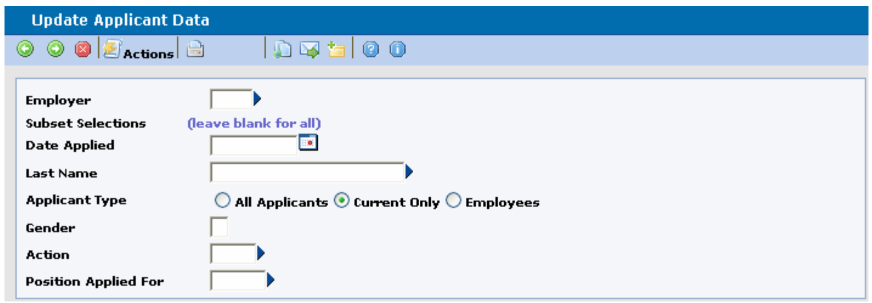


Figure 2-28: Update Applicant Data prompt page

4 Use the information in the "Creating Applicant Data" section to complete this page.

5 Click **Next**. The system displays a page similar to Figure 2-29.

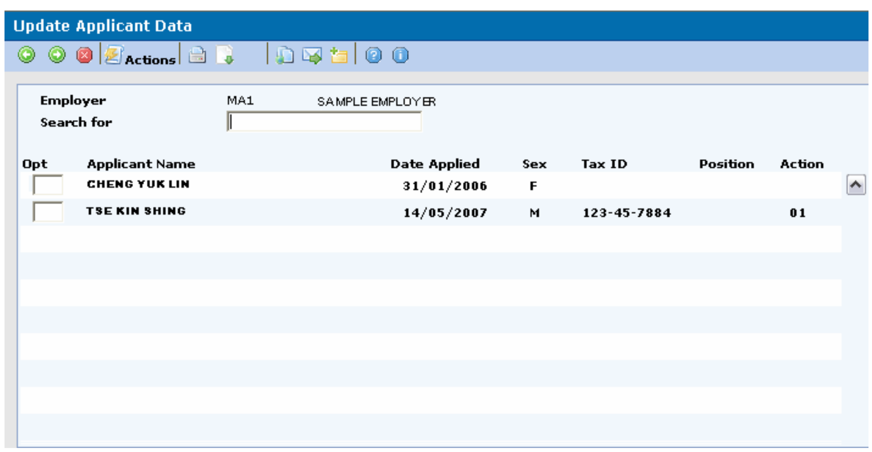


Figure 2-29: Update Applicant Data selection page

6 Click **ID** next to the record. The system displays a page similar to Figure 2-30.

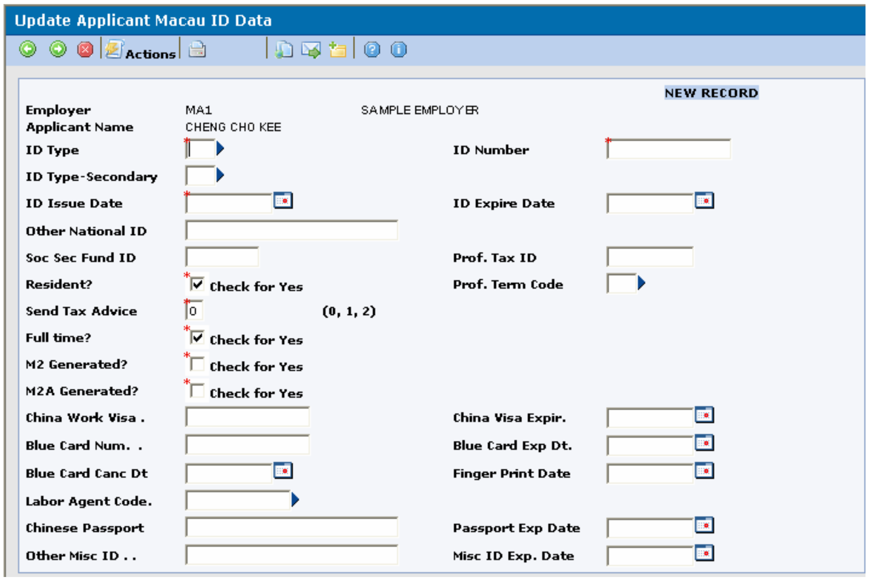


Figure 2-30: Update Applicant Macau ID Data page

7 Use the information below to complete this page.

ID Type

Specify the value that represents the type of ID given by the Macau applicant. This value is associated with code type TID. This value indicates the ID type on most standard tax reports for Macau such as the M2, M2A, M3/M4 Professional Tax report and the Social Security Fund Report after the applicant is hired.

ID Number

Specify the ID number given by the Macau applicant. This value indicates the ID number on most standard tax reports for Macau such as the M2, M2A, M3/M4 Professional Tax report and the Social Security Fund report.

ID Type - Secondary

Specify the value that represents the type of ID given by the Macau applicant. This value is associated with code type TI2. This value indicates the ID Type on the Manpower/Attendance report (green form) in column 10.

ID Issue Date

Specify the issue date of the identification document for the Macau applicant.

ID Expire Date

Specify the expiration date of the identification document for the Macau applicant, if applicable.

Other National ID

Type a national ID that is larger than or different from the value in the *ID Number* field for the Macau applicant.

Soc Sec Fund ID

Type the Macau social security fund number for this applicant, if applicable. This value is used for the quarterly social security fund report of employee information.

Prof Tax ID

Type the Macau professional tax ID number issued by the government for this applicant, if available. This value is used for the annual M3/M4 report of employee wage and tax amounts after the applicant is hired.

Resident

Specify yes if the applicant is a Macau resident. This information is used for various government reports, such as the semi-annual gaming survey after the applicant is hired.

Prof. Term Code

Specify the professional term code for this Macau applicant. This value is required when you use the electronic format to report M3/M4 information. This value is associated with code type XC1.

Send Tax Advice

Specify where the government should send tax advice for the applicant after the applicant is hired. This information is reported on the Macau M2 form. Valid values:

0	Employee residence address
1	Employer address
2	P.O. Box

Full Time

Specify yes if the Macau applicant is applying for a full-time position. Specify no if the employee is applying for a part-time position.

This information is reported on the M2 form and is also used for various government reports such as the semi-annual gaming statistics survey after the applicant is hired.

M2 Generated?

Specify yes if the Macau M2 form has been generated for the applicant. Otherwise, specify no.

M2A Generated?

Specify yes if a terminated employee was included on a Macau M2A report. Otherwise, specify no. For applicants, always specify no.

China Work Visa

If applicable, enter the information associated with this field for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

China Visa Expir.

If applicable, enter the expiration date for this applicant ID for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Blue Card Num

If applicable, enter the information associated with this field for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Blue Card Exp Dt

If applicable, enter the expiration date for this applicant ID for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Blue Card Canc Dt

If applicable, enter the associated date for this applicant for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Finger Print Date

If applicable, enter the associated date for this applicant for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Labor Agent Code

Specify the value that represents the labor agent associated with this Macau applicant. Use code type LAC to define values for this field.

Chinese Passport

If applicable, enter the information associated with this field for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Passport Exp Date

If applicable, enter the associated date for this Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Other Misc ID

If applicable, enter the information associated with this field for a Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

Misc ID Exp Date

If applicable, enter the associated date for this Macau applicant. You can use the *Update User Field Controls* function to define the text for this field.

8. Click Exit.

9. Select Exit and Save to save your changes and return to the Update Applicant Data selection page.

10. Click Exit twice to return to the main menu.

Updating an Applicant Record

After you enter applicant information in Infinium HR, you can update any of the information in the applicant's record at any time except the application date.

When you hire an applicant using the *Enter New Hire* function, the system automatically updates the applicant record with the assigned employee number. Although you cannot see this field, the system uses the *Employee Number* field in the applicant data record to determine if the applicant has been hired or is still available.

Recording an Applicant Interview

You use the *Update Applicant's Interviews* function to track and maintain information about applicant interviews and results. You can perform any of the following activities with this function:

- Record new interviews
- Display previously recorded interviews
- Update or delete interviews you previously recorded

Since you record interviews using the applied-for position(s) associated with the applicant data record, you must create the applicant record and assign the applicant to potential positions before you can record the applicant's interview information.

After you record interview information, you can use it to select applicants on the *Display Applicant Data* screen. You can use the *List Applicant Interviews* function to print interview information.

Follow the steps below to record applicant interview information.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Update Applicant Data.*

3 Select *Update Applicant Interviews* [UAI]. The system displays the screen shown in Figure 2-31.

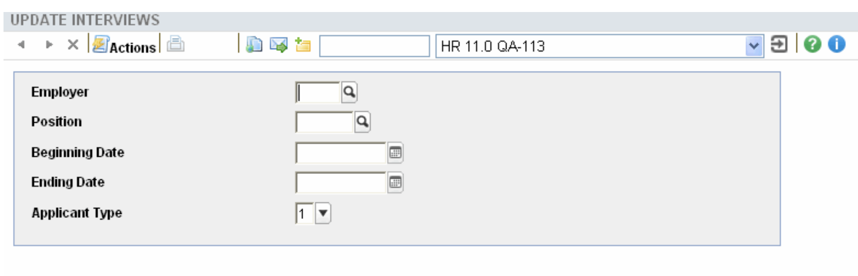


Figure 2-31: Update Interviews prompt screen

4 Use the information below to fill in the fields on this screen.

You use this function to record new interviews, update or delete interview information entered previously or display existing interview information. You can only record interviews for positions to which an applicant has applied. You use the Update Applicant Positions Applied For screen to associate an applicant with applied-for positions.

You must type information in the *Employer*, *Position* and *Applicant Type* fields. You use the *Beginning Date* and *Ending Date* fields to include or exclude previously recorded interviews from displaying in the sub-file of the following screen.

Employer

Type the value that identifies the potential employer for this applicant.

Position

Type the position for which you are recording interviews. You can press F4 to display a list of the positions defined for this employer.

You must define positions using the *Update Position Data* function before you can use them on this screen. You use positions to identify the type of work an employee performs and where the employee is located in an organization, either geographically or functionally. See the *Infinium HR Guide to Controls* for a complete discussion of positions.

Beginning Date

Use this field to specify the earliest date for which you want to display applicant interview information. The system restricts the display to interviews conducted on or after this date. Leave this field blank if you are typing a new interview, or if you want the system to display all previously recorded interviews on the next screen.

Ending Date

Use this field to specify the latest date for which you want to display applicant information. The system restricts the display to interviews conducted on or before this date. Leave this field blank if you are typing a new interview, or if you want the system to display all previously recorded interviews on the next screen.

Applicant Type

Use this field to identify which previously recorded applicant interviews the system should display in the sub-file at the bottom of the Update Interviews screen.

The system also uses the value you type in this field to determine which applicants to display when you press F4 on the *App. Last Name* field on the Update Interviews screen. Valid values for this field are:

0	Display information for all applicants both hired and not hired.
1	Display information for only not hired current applicants.
2	Display information for only hired former applicants.

5 Press Enter. The system displays the screen shown in Figure 2-31.

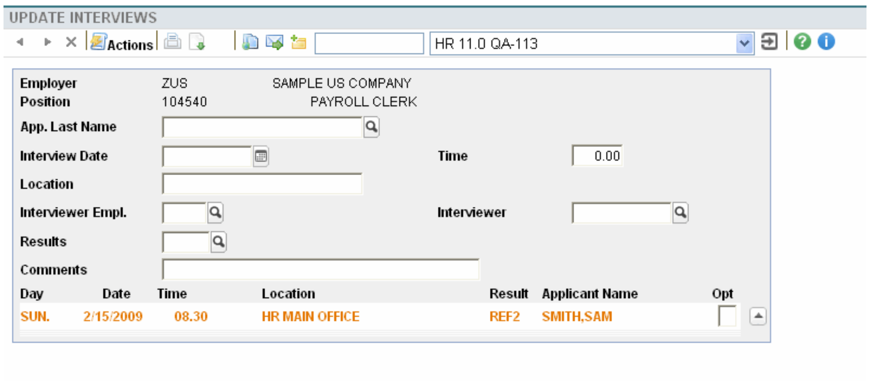


Figure 2-32: Update Interviews screen

6 Use the information below to fill in the fields on this screen.

Depending on the information you typed into the *Position*, *Beginning Date*, *Ending Date* and *Applicant Type* fields on the preceding screen, the system displays the information about previously recorded interviews in the list shown at the bottom of this screen. The most recent interview information appears at the top of the display.

The system displays in green (lowlighted) the names of former applicants who have been hired. Names of current applicants are shown in white (highlighted).

The *App. Last Name*, *Interview Date* and *Time* fields are required. All other fields are optional. Type as much information as your business needs require in the optional fields.

App. Last Name

Type the last name of the applicant who has been or will be interviewed for the position you specified on the prompt screen. You can only enter the name of an applicant who has been assigned to this position on the fourth screen of the applicant data record; press F4 to display a list of eligible applicants.

Interview Date

Type the date of this interview.

Time

Type the time of this interview using military style, 24-hour clock, HHMM format. For example, if the interview is scheduled to take place at 9:00 a.m., type **0900**; if the interview is scheduled to take place at 2:30 p.m., type **1430**.

Location

Type the location where this interview will take place. This is an 18-character free-form field that does not require pre-defined values.

Interviewer Empl.

Type the employer code of the interviewer. Press F4 to display a list of valid employer codes.

Interviewer

Type the employee number of the interviewer. Press F4 to display a list of all the employees assigned to the employer specified above.

Results

Type the code value that identifies the results of the interview. You define values for this field using code type **INV**.

Comments

Type any comments related to this interview. This is a 30-character free-form field that does not require pre-defined values.

7 Press Enter. The system saves this interview data in the sub-file at the bottom of this screen. You can record additional interviews without exiting from this screen.

Press F3 to exit from this screen and save your changes. The system displays the Update Interviews prompt screen. You can type a new position code for which you want to record interviews or press F3 to return to the Infinium HR main menu.

Updating Interview Information

You can update information typed for prior interviews by following the steps below.

1. On the Update Interviews screen, type **2** in the *Opt* field next to the interview record you want to update. Then press Enter. The system displays this interview data on the top half of your screen so that you can make any needed changes.

2. Press Enter to save this updated information in the sub-file of this screen.

3. Press F3 to exit from this screen. The system displays the Update Interviews prompt screen. You can type a new position code for which you want to record, update or delete interviews or press F3 to return to the Infinium HR main menu.

Deleting Interview Information

You can delete information typed for prior interviews by following the steps below.

1. On the Update Interviews screen, type **4** in the *Opt* field next to the interview record you want to delete. Then press Enter. The system replaces the interview information in the sub-file with the message ***DELETED**. After you leave this screen, the system removes this message.

2. Press F3 to exit from this screen. The system displays the Update Interviews prompt screen. You can type a new position code for which you want to record, update or delete interviews or press F3 to return to the Infinium HR main menu.

Recording Recruitment Costs

You use the *Update Recruitment Costs* function to record expenses related to the recruiting and hiring of employees. You can track specific expenses for an individual applicant, general expenses related to the open position such as advertising costs or search firm fees, or expenses not related to any particular applicant or opening.

You can perform the following activities with the *Update Recruitment Costs* function:

- Record new recruitment costs
- Display previously recorded recruitment costs
- Update or delete costs you recorded previously

After you enter recruitment cost information, you can use the *Update Recruitment Costs* function or the *Display Recruitment Costs* function to display that information. You can use the *List Recruitment Costs* function to print a report of recruitment expenses.

Entering Recruitment Cost Information

1 From the Infinium HR main menu select *Applicant Administration.*

2 Select *Update Applicant Data.*

3 Select *Update Recruitment Costs* [UREC]. The system displays the screen shown in Figure 2-33.

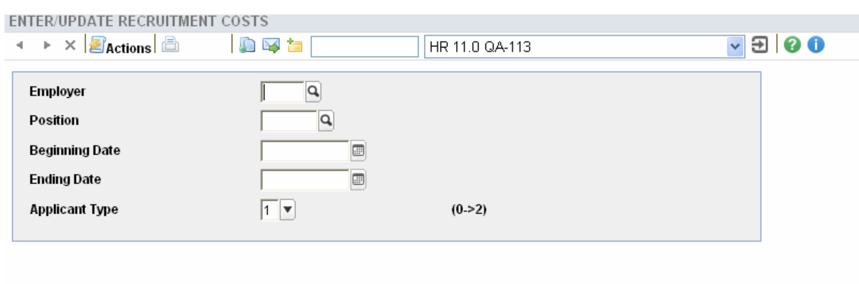


Figure 2-33: Enter/Update Recruitment Costs prompt screen

4 Use the information below to fill in the fields on this screen.

You must type information in the *Employer* and *Applicant Type* fields. If you want to record recruiting expenses for a particular position opening, you must type the code that identifies that opening in the *Position* field.

You use the *Beginning Date* and *Ending Date* fields to include or exclude previously recorded cost information from displaying in the sub-file of the following screen.

You use this function to record new recruiting costs, update or delete cost information entered previously or display existing recruitment cost information. You can only record costs for positions to which an applicant has applied. You use the Update Applicant's Data Positions Applied For screen to associate an applicant with applied-for positions.

Employer

Type the value that identifies the potential employer for this applicant.

Position

Type the value that identifies the position for which you are recording recruitment costs. You can also leave this field blank to record expenses not associated with a particular open position or applicant.

You must define positions using the *Update Position Data* function before you can use them on this screen. You use positions to identify the type of work an employee performs and where the employee is located in an organization, either geographically or functionally. See the *Infinium HR Guide to Controls* for a complete discussion of positions.

Beginning Date

Use this field to specify the earliest date for which you want to display recruitment cost information. The system restricts the display to costs incurred on or after this date. Leave this field blank if you are typing a new cost, or if you want the system to display all previously recorded costs on the next screen.

Ending Date

Use this field to specify the latest date for which you want to display recruitment cost information. The system restricts the display to costs incurred on or before this date. Leave this field blank if you are typing a new cost, or if you want the system to display all previously recorded costs on the next screen.

Applicant Type

Use this field to identify which previously recorded recruitment costs the system should display in the sub-file at the bottom of the Enter/Update Recruitment Costs screen. The system displays costs associated with the applicant type you specify.

The system also uses the value you type in this field to determine which applicants to display when you press F4 on the *Applic Last Name* field on the Enter/Update Recruitment Costs screen. Valid values for this field are:

0	Display information for all applicants both hired and not hired.
1	Display information for only not hired current applicants.
2	Display information for only hired former applicants.

5 Press Enter. The system displays the screen shown in Figure 2-34.

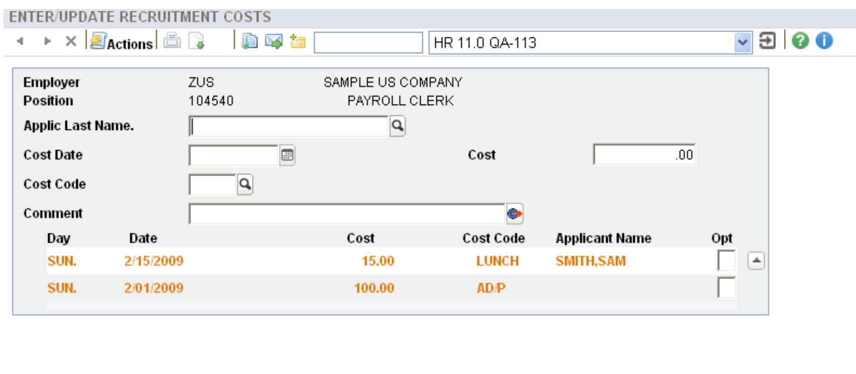


Figure 2-34: Enter/Update Recruitment Costs screen

6 Use the information below to fill in the fields on this screen.

Depending on the information you typed into the *Position*, *Beginning Date*, *Ending Date* and *Applicant Type* fields on the preceding screen, the system displays the information for previously recorded recruitment costs in the sub-file at the bottom of this screen.

The system displays costs information for former applicants who have since been hired in green (lowlighted). Cost information for current applicants is shown in white (highlighted).

The *Cost Date* and *Cost Code* fields are required. All other fields are optional. Type as much information as your business needs require.

App. Last Name

If this cost is associated with a specific applicant, type the applicant's last name. To record costs for a specific applicant, you must type the position he or she applied for on the preceding prompt screen. This position must be assigned to this applicant on the fourth screen of the applicant data record. Press F4 to display a list of eligible applicants.

If you are recording a general expense not related to a particular applicant, leave this field blank.

Cost Date

Type the date this recruitment cost was incurred.

Cost

Type the amount of this recruitment cost.

Cost Code

Type the code value that identifies the kind of recruitment cost that was incurred. You define values for this field using code type **CST**.

Comment

Type any comments related to this cost item. This is an 18-character free-form field that does not require a pre-defined value.

Recruitment costs do not interface with Infinium GL.

7 Press Enter to store this cost data in the sub-file at the bottom of this screen. You can record additional costs for the position specified on the prompt screen without exiting from this screen.

8 When you are finished, press F3 to exit from this screen and save your changes in the sub-file at the bottom of this screen.

The system displays the Enter/Update Recruitment Costs prompt screen. You can type a new position for which you want to record costs or press F3 to return to the Infinium HR main menu.

Updating Recruitment Costs

You can update recruitment cost information typed previously by following the steps below.

1 On the Enter/Update Recruitment Costs screen, type **2** in the *Opt* field next to the cost record you want to update. Then press Enter. The system displays this cost data on the top half of your screen so that you can make any needed changes.

2 Press Enter to save the updated information in the sub-file of this screen.

3 Press F3 to exit from this screen. The system displays the Enter/Update Recruitment Costs prompt screen. You can specify new selection criteria to record additional costs or press F3 to return to the Infinium HR main menu.

Deleting Recruitment Costs

You can delete information entered for prior recruitment costs by following the steps below.

1 On the *Enter/Update Recruitment Costs* screen, type **4** in the *Opt* field next to the cost record you want to delete. Then press Enter. The system replaces the cost information with the message ***DELETED**. After you leave this screen, the system removes this message.

2 Press F3 to exit from this screen. The system displays the Enter/Update Recruitment Costs prompt screen. You can specify new selection criteria to record additional costs or press F3 to return to the Infinium HR main menu.

Deleting an Individual Applicant

You can delete an individual applicant record by pressing F22 on the applicant's data record. Follow the steps below to display the applicant data record.

1. From the Infinium HR main menu select *Applicant Administration.*

2. Select *Update Applicant Data.*

3. Select *Update Applicant Data* [UA]. The system displays the Update Applicants prompt screen.

4. Use the information below to fill in the fields on this screen.

   Employer

   Type the value that identifies the employer whose applicant you want to delete.

   Date Applied

   Type the application date of the applicant whose record you want to delete.

   Last Name

   Type the last name of the applicant whose record you want to delete or press F4 to display a list of applicants in the category specified by the *Incl Hired Applic* field described below.

   Incl Hired Applic

   Type the value that represents the category of the applicant whose record you want to delete. Valid values are:

0	All applicants both hired and not hired.
1	Not hired current applicants.
2	Hired former applicants.

5. Press Enter. The system displays the Update Applicants selection screen similar to Figure 2-2

6 Specify **Delete** next to the applicant record to delete. The system deletes this record and all other related information for this applicant. The information includes:

- Applicant positions applied for
- Applicant education
- Applicant job training
- Applicant dependents
- Applicant relatives employed
- Applicant alternate name and address
- Applicant alternate payroll and ID information
- Applicant interviews
- Recruitment costs

If you need to delete a large group of applicants based on their application date or position-applied-for, use the *Purge Applicant Data* function described below.

Purging Applicant Data

You use the *Purge Applicant Data* function to mass delete applicant records or position-applied for records from your database. You can purge applicants from more than one employer or applied-for-position simultaneously, or restrict the purge to a specific employer or position. You indicate whether to remove hired, not hired or both types of applicants from your database.

You use the *Purge through date* field on the Purge Applicant Data screen to specify which records the system purges. The system uses this date differently depending on if you fill the *Position appl for* field on the Purge Applicant Data screen.

- If you specify an applied-for position, the system removes only position-applied-for, applicant interview and recruitment cost records on which the *Date Applied* is the same as or earlier than the purge through date. The system does not remove the related applicant data or other applicant information.
- If you leave the *Position appl for* field blank, the system compares the *Purge through date* you specify to the application and position-applied-for dates for all applicants.

  The system removes all records for applicants whose application date and position-applied-for dates are the same as or precede the *Purge through date*.

  The system removes only the position-applied-for information for those applicants whose application date precedes the *Purge through date* but who have position-applied-for dates after the *Purge through date*. The system removes only the position-applied for information that precedes the *Purge through date*. The example below illustrates how the system determines which applicant information to remove.

  When the purge function runs, data can be removed from the following applicant files:

  - Applicant data record
  - Applicant positions applied for
  - Applicant education
  - Applicant job training
  - Applicant dependents
  - Applicant relatives employed

- Applicant alternate name and address
- Applicant alternate payroll and ID information
- Applicant interviews
- Recruitment costs

The system automatically generates a list of the purged applicants.

Follow the steps below to purge applicants.

1 From the Infinium HR main menu select *System Operations.*

2 Select *Personnel Purge Functions.*

3 Select *Miscellaneous Data.*

4 Select *Purge Applicant Data* [PAD]. The system displays the screen shown in Figure 2-35.

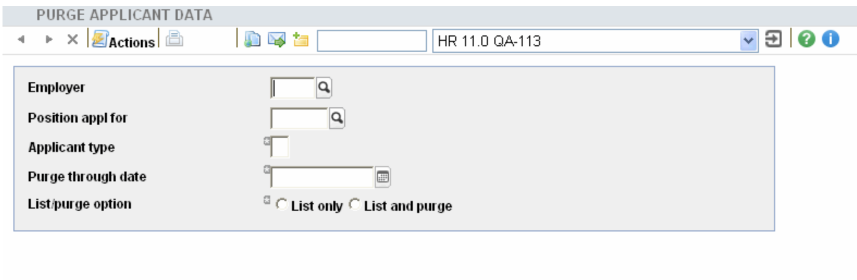


Figure 2-35: Purge Applicant Data screen

5 Use the information below to fill in the fields on this screen.

You must complete the *Applicant Type* and *Purge Through Date* fields.

Employer

Type the employer code that identifies the employer whose records you want to purge. Leave this field blank to include all employers.

Position appl for

Type the value that identifies the position the system should use to select position-applied for records to purge. You can press F4 to display a list of positions defined for the employer typed above. Leave this field blank to purge applicant records regardless of the position(s) for which they applied.

For example, you have the following applicant data:

Applicant Name	Application Date	Position-Applied For	Date Applied
Terry Anderson	03-15-09	ACCT ACCT	03-15-09 06-30-09
Cynthia Carson	08-10-09	ACCT ENGR	08-10-09 08-10-09

You type **12-31-09** in the *Purge through date* field and **ACCT** in the *Position appl for* field. The system removes only the **ACCT** position-applied-for records of Terry Anderson and Cynthia Carson dated 3-15-09 and 8-10-09 respectively. Terry and Cynthia's other position-applied for records along with their applicant data, education data, job training data, interview data and, recruitment cost data remain on the system.

Applicant Type

Type the value that identifies the type of applicant records you want to purge. Valid values are:

0	Include all applicants both hired and not hired.
1	Include only not hired current applicants.
2	Include only hired former applicants.

Purge Through Date

Type the date through which you want to purge applicant data.

If you typed a position in the *Position appl for* field, the system compares the *Purge Through Date* to each applicant's *Date Applied* for the specified position. The system purges position-applied-for, applicant interview and recruitment cost records with dates that are earlier or the same as this date. The system does not remove the rest of the applicant's records, as shown in the above example.

If you leave the *Position appl for* field blank, the system compares the *Purge Through Date* to each applicant's *Application Date* stored in the applicant's data record and the *Date Applied* dates in all of the positions-applied for records.

The system purges applicants whose *Application Date* and all position-applied for dates are the same as or earlier than the *Purge through date.* The system removes only the position-applied for records for applicants whose *Application Date* precedes the *Purge through date* but who have positions-applied for after the specified *Purge through date*.

Using the same data as in the previous example, you leave the *Position appl for* field blank and type **12-31-09** in the *Purge through date* field. The system removes all of Cynthia Carson's applicant records but only removes the position-applied for record dated 3-15-09 for Terry Anderson. Since he has a position-applied for record after the specified *Purge through date*, the rest of his applicant information remains on the system.

List/purge option

Specify a value to indicate whether to purge data or generate a trial report of data that you eventually want to purge. Valid values are:

1	Print a list of applicant records that meet your selection criteria but do not purge them.
2	Print a list of applicant records that meet your selection criteria and purge them.

6 Press Enter to submit the purge for processing. The system produces the following message at the bottom of the Purge Applicant Data screen and returns you to the Infinium HR main menu:

Building submission request...

The system uses batch processing to generate the Purge Applicant Data report. From the Infinium HR main menu, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print this report using options on these screens. A sample is shown on the following page.

The Position Appl. For column indicates if the system purged the entire applicant record or only the position-applied for record(s). A row with a value in the Position Appl. For column indicates an applied-for position was purged; a row with this column blank indicates the system purged the entire applicant record. The same applicant can have multiple rows in the report if he or she applied for several positions during the specified time period or for the same position on more than one date within the specified period.

PEGPAD PETPAD P U R G E A P P L I C A N T D A T A Page 1
7/17/95 14:58:17 ALL APPLICANTS PURGE THROUGH DATE 12/31/1994
EMPLOYER ZUS SAMPLE US COMPANY
POSITION APPLIED FOR

APPLICANT NAME	TAX ID NUMBER	DATE OF BIRTH	ETHNIC	SEX	MARITAL STATUS	DATE OF APPLICATION	APPLICANT TYPE	POSITION APPL. FOR
STEVENSON,MICHAEL				M		2/15/1994	UNHIRED	100140
STEVENSON,MICHAEL				M		2/15/1994	UNHIRED	
EDWARDS,STEPHANIE				F		4/20/1994	UNHIRED	114220
EDWARDS,STEPHANIE				F		4/20/1994	UNHIRED	
GILROY,GLENN					M	7/08/1994	UNHIRED	112540

TOTAL PURGED APPLICANTS AND APPLIED FOR POSITIONS FOR EMPLOYER ZUS IS 5

Chapter 3 Displaying and Printing Applicant Data

3

The chapter consists of the following topics:

Overview of Displaying and Printing Applicant Data

In this chapter you learn how to use the display and report options in the *Applicant Administration* function to view or print basic information, skills and educational achievements of applicants for employment at your company. In addition, you learn how to display and print information related to the employment interviews and recruiting costs associated with applicants.

Before you can use the display and report options in the Applicant Administration function, you use the *Update Applicant's Data, Update Applicant's Interviews* and *Update Recruitment Costs* functions to enter applicant data into Infinium HR/PY. See the "Updating Applicant Data," chapter for details.

Displaying Applicant Information

After you create applicant records, you can display three types of applicant information:

- Applicant data
- Applicant skills
- Applicant recruitment costs

You can use the display functions to identify applicants and respond to inquiries. You cannot update the applicant's record when you use the display functions.

Displaying Applicant Data

You use the *Display Applicant's Data* function to review the applicant information you entered using the *Update Applicant Data* function.

The system locates one or many applicants on the Display Applicant's Data screen, depending on the number of fields you type on the selection screen.

Follow the steps below to display the selection screen for the *Display Applicant Data* function.

1. From the Infinium HR main menu select *Applicant Administration*.
2. Select *Display Applicant Data.*
3. Select *Display Applicant's Data* [DA]. The system displays the screen shown in Figure 3-1.

```
 5/01/07  12:17:31        Display Applicant Data         PEGD95     PEDD95

Employer  . . . . . . ___ +
Applicant name  . . . __________________ +
Interviewer . . . . . _________ +
Position applied  . . ______ +          Shift . . . . . . . . _____ +
Skill . . . . . . . . _____ +           Task  . . . . . . . . _____ +
Ethnicity/Race. . . . _ +               Sex . . . . . . . . . _
Education . . . . . . ___               Foreign language  . . _____ +
Action code . . . . . _____ +           Schedule  . . . . . . _
Travel  . . . . . . . _                 Relocate  . . . . . . _____ +
Source  . . . . . . . _____ +           Applicant type  . . . 1
From appl. date . . . _________         To appl. date . . . . _________

F3=Exit   F4=Prompt
```

Figure 3-1: Display Applicant Data prompt screen

4 Use the information below to fill in the fields on this screen.

You use this screen to specify selection criteria that identify the applicant or group of applicants whose records you want to display.

You can leave all of the fields on the selection screen blank except *Applicant Type*. When you leave all of the fields blank and press Enter, the system displays all of the applicants in the Applicant Type category you specified for all employers. Valid values for the *Applicant Type* field are:

0	Display all applicants both hired and unhired.
1	Display only unhired current applicants.
2	Display only hired former applicants.

To restrict the number of applicants the system displays on the screen shown in Figure 3-2, complete one or more of the following fields.

Employer

Type the value that identifies the employer associated with the applicant record you want to display.

Applicant name

Type the last name of the applicant whose record you want to display. Or, leave this field blank to display records for all applicants who meet the criteria you specify.

If you do not know how to spell the applicant's entire last name, you can type as much as you know and press F4. The system displays the selected applicants whose last names match the name you typed, based on the value you type in the *Applicant Type* field.

Select the applicant you want to display from the look-up screen by typing any character next to the applicant's name. Then press Enter to return to the selection screen for display applicant data. Press Enter again to page through the applicant's record.

5. To locate multiple applicants within an employer, type the *Applicant Type* field and leave the *Applicant Last Name* field blank. Press Enter. The system searches your applicant database and displays on the bottom half of the screen the names and other key information about all applicants of the Applicant Type you selected for the specified employer.

6. Use the additional fields on the Update Applicant Data prompt screen to further restrict the number of applicants the system displays on the bottom half of the screen shown in Figure 3-2.

   You type a value into one or more of the following fields on the Display Applicant Data prompt screen when you want only those applicants whose data corresponds with the specified value(s) to appear in the list. If you want all of the applicants to appear regardless of their values for a particular field, leave that field blank. The more criteria you specify, the fewer applicants the system locates.

   - *Interviewer*
   - *Position applied*
   - *Shift*
   - *Skill*
   - *Task*
   - *Ethnicity/Race*
   - *Sex*
   - *Education*
   - *Foreign language*
   - *Action code*

- *Schedule*
- *Travel*
- *Relocate*
- *Source*
- *From appl. date*
- *To appl. Date*

Applicant Type

Use this field to specify the type of applicant information you want to display. Valid values are:

0	Display all applicants both hired and unhired.
1	Display only unhired current applicants.
2	Display only hired former applicants.

7 Press Enter. The system displays the names of applicants who meet your selection criteria in the bottom half of the screen as shown in Figure 3-2.

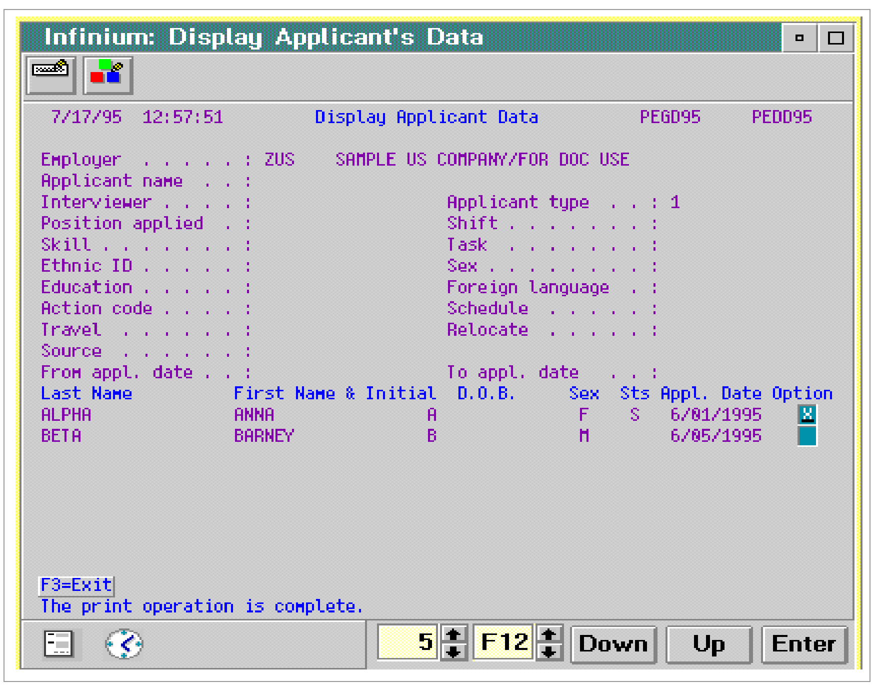


Figure 3-2: Display Applicant Data screen

8 To display the record of a specific applicant, type any character in the *Opt* field next to the applicant's name. Press Enter. The system displays the first screen of the applicant's record. Press Enter to view the next three screens

of applicant information or press F3 to return to the Display Applicant Data screen.

The system automatically highlights the name of applicants whose information you reviewed on the Display Applicant Data screen.

9 Press F3 to return to the Display Applicant Data prompt screen. You can type additional selection criteria or press F3 to return to the Infinium HR main menu.

Displaying Applicant Skills

You use the *Display Applicant's Skills* function to display all applicants who possess a particular skill. You can display the skills information for applicants in one employer or across all employers and you can display all the skills possessed by a particular applicant.

To display applicant skills, use the following steps:

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Display Applicant Data.*

3 Select *Display Applicant's Skills* [DAS].

The system displays the screen shown in Figure 3-3.

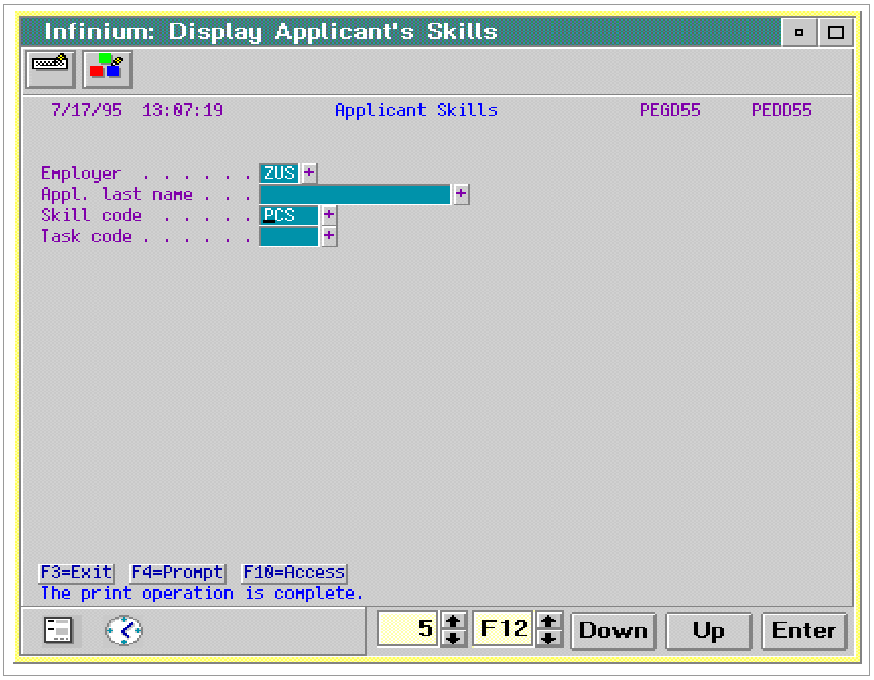


Figure 3-3: Applicant Skills prompt screen

4 Use the information below to fill in the fields on this screen.

You must assign the applicant to skill and task codes on the applicant's Update Applicant's Data Update Applicant Job Training screen before you can use this screen.

Employer

Type the value that identifies the employer whose applicant records you want to display. You must also type a value in either the *Appl. last name* or *Skill code* fields.

Or, leave this field blank to display information for all employers. If you leave this field blank, you must type a value in the *Skill code* field.

Appl. last name

Type the last name of the applicant whose skill information you want to display. Leave this field blank to display information for all applicants who possess the skill you specify. Then press Exit.

Skill code

Type the code value that identifies the skill associated with the applicant records you want to display. The code value is associated with code type **SKL**. You must type a value into this field if you left the *Employer* field blank.

If you entered a value into the *Employer* and *Appl. last name* fields, you can leave this field blank to display all of the skills of a particular applicant.

Task code

Type the code value that identifies the task for which you want to display applicant information. The code value is associated with code type **TSK**. Or, leave this field blank to display applicants possessing any task code.

5 Press Enter. The system displays a list of applicants who meet the specified criteria in the sub-file at the bottom of the screen shown in Figure 3-4.

If you type the name of a specific applicant on the prompt screen, the system displays all the skills and tasks associated with the applicant along with information from the *Date Completed* and *School/Subject/Source* fields on the Applicant Job Training screen.

If you type a skill code on the prompt screen, the system displays the names of the applicants who possess the specified skill along with their tax identification number and application date.

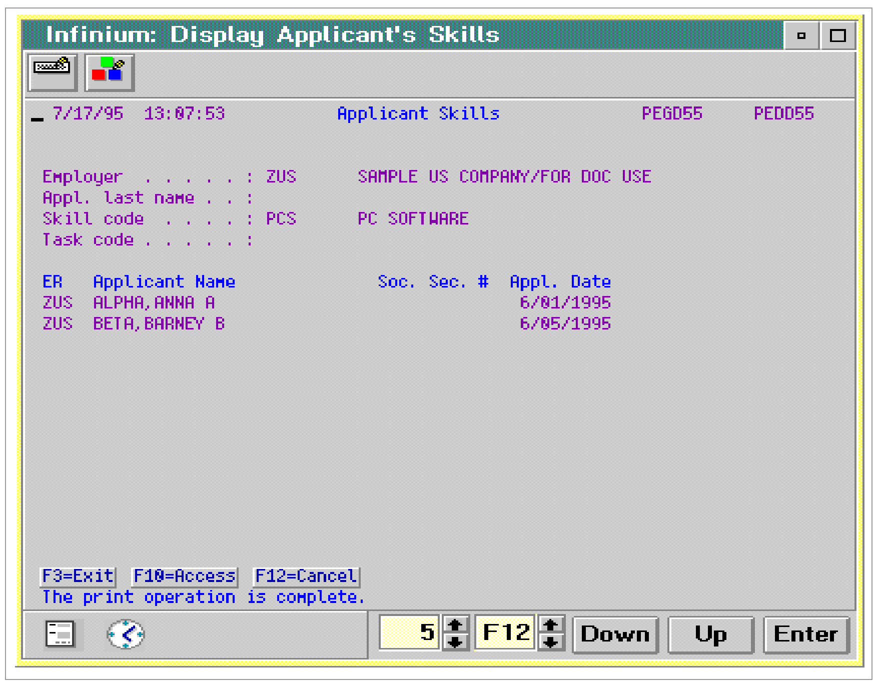


Figure 3-4: Applicant Skills screen

6 After you review the information, press Enter or F12 to return to the Display Applicant Skills Data screen. Press F3 to return to the Infinium HR main menu.

Displaying Recruitment Costs

You use the *Display Recruitment Costs* function to review cost information associated with your recruiting activities.

To display recruitment costs, follow the steps below.

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *Display Applicant Data.*

3 Select *Display Recruitment Costs* [DRC]. The system displays the screen shown in Figure 3-5.

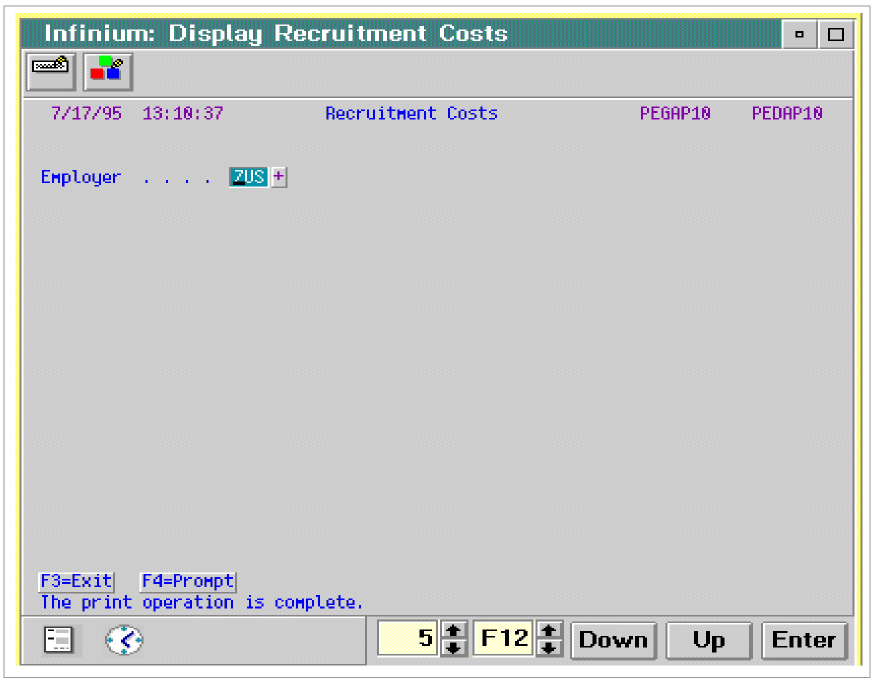


Figure 3-5: Recruitment Costs prompt screen

4 Type the value that identifies the employer whose recruitment cost records you want to display.

5 Press Enter. The system displays the screen shown in Figure 3-6.

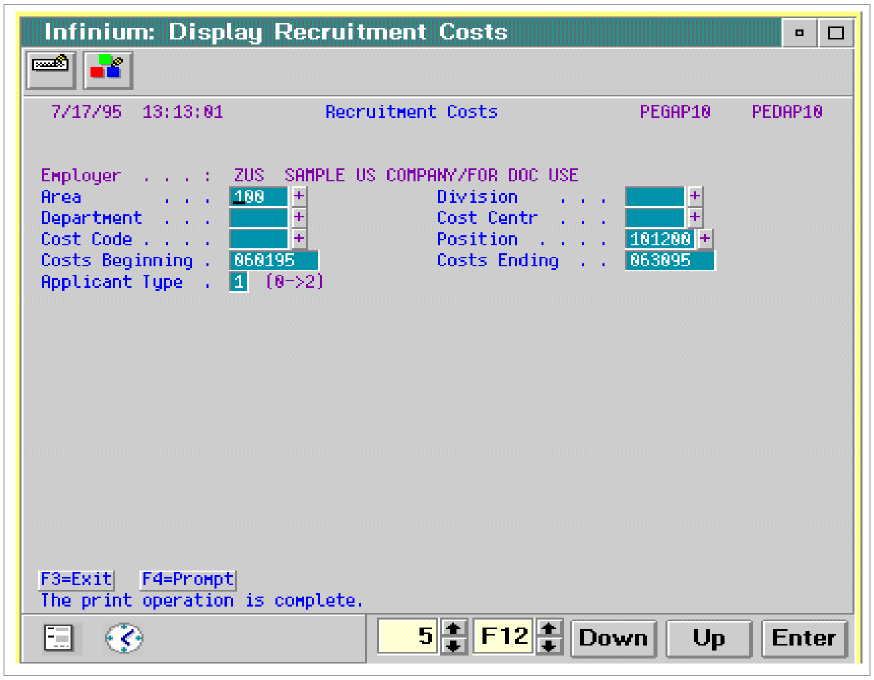


Figure 3-6: Recruitment Costs screen

6 Use the information below to fill in the fields on this screen.

You can display recruitment costs by organizational level or by cost code. You must type a value in one or more of the level field(s) defined for this employer or in the *Cost Code* field. The levels are associated with the applied-for positions assigned to each applicant.

Your Infinium HR/PY implementation team defines up to four levels for each employer and labels them on the Employer Control screen. The field names on this screen are unique for each employer depending on the values in the *Level 1*, *Level 2*, *Level 3* and *Level 4* fields on the employer control record for the employer specified above. See the *Infinium Human Resources Guide to Controls* for more details on organizational levels and positions. The generic names for the level fields are used in the following section.

Level 1

Type the value that represents the specific level 1 for which you want to display recruiting cost information. The system displays the costs associated with applicants who applied for a position assigned to this level 1 location. Press F4 to display the level 1 records defined for this employer or leave this field blank to display information for applicants associated with any level 1 location within this employer.

Level 2

If you specified a level 1 location, you can further restrict the recruitment costs that the system displays by typing the value that represents the specific level 2 within the level 1 typed above. The system displays the costs associated with applicants who applied for a position assigned to this level 2 location. Press F4 to display the level 2 records defined for this employer or leave this field blank to display information for applicants associated with any level 2 location within the level 1 specified above for this employer.

Level 3

If you specified level 1 and level 2 locations, you can further restrict the recruitment costs that the system displays by typing the value that represents the specific level 3 within the level 2 typed above. The system displays the costs associated with applicants who applied for a position assigned to this level 3 location. Press F4 to display the level 3 records defined within the specified level 2 for this employer or leave this field blank to display information for applicants associated with any level 3 location within the level 2 specified above for this employer.

Level 4

If you specified levels 1, 2 and 3, you can further restrict the recruitment costs that the system displays by typing the value that represents the specific level 4 within the level 3 typed above. The system displays the costs associated with applicants who applied for a position assigned to this level 4 location. Press F4 to display the level 4 records defined within the specified level 3 for this employer or leave this field blank to display information for applicants associated with any level 4 location within the level 3 specified above for this employer.

Cost Code

Use this field to identify the cost code for which you want to display recruiting cost information. Type the code value that represents the cost code. You define values for this field using code type **CST**. Press F4 to display the valid cost codes or leave this field blank to display information for all cost codes within the level(s) specified above.

Position

Use this field to identify the position for which you want to display recruiting cost information. Type the code value that represents the position. Leave this field blank to display recruiting cost information for all positions.

Costs Beginning

Use this field to specify the earliest date for which you want to display recruiting cost information. The system restricts the display to costs incurred on or after this date. Leave this field blank if you want the system to display all recruitment costs on the next screen.

Costs Ending

Use this field to specify the latest date for which you want to display recruitment cost information. The system restricts the display to costs incurred on or before this date. Leave this field blank if you want the system to display all recruitment costs on the next screen.

Applicant Type

Use this field to identify the recruitment costs the system should display on the next screen. Valid values are:

0	Display all applicants (hired and unhired).
1	Display only unhired (current) applicants.
2	Display only hired (former) applicants.

7 Press Enter. The system displays a list of recruitment costs and the names of the associated applicants, if applicable, as shown in Figure 3-7.

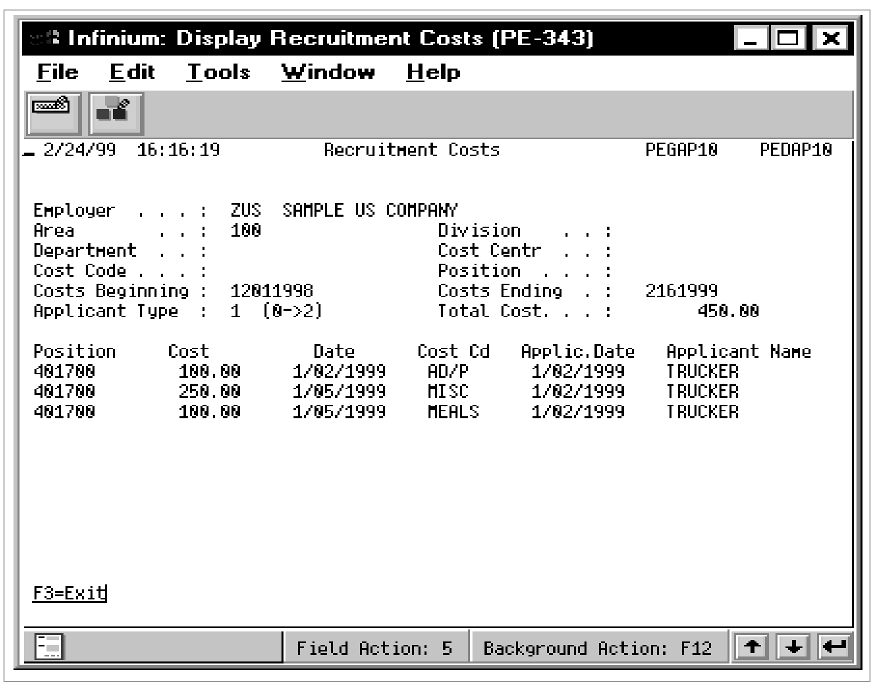


Figure 3-7: Recruitment Costs screen

The system adds all of the specified costs and displays the total in the *Total Cost* field on this screen.

8 After you review the information, press Enter or F3 to return to the Display Recruitment Cost screen. Press F3 again to return to the Infinium HR main menu.

Printing Applicant Reports

You use the *List Applicant Data* function to print three standard reports on applicants. This section provides you with information on how to generate the following reports:

- List Applicants Data
- List Applicants Interviews
- List Recruitment Costs

In addition to the reports found in the *List Applicant Data* function, you can print three other reports that provide analysis of applicants by EEO Unit, ethnic category and gender. You find these reports in the *EEOC/Affirmative Action* function of Infinium HR. See the “Producing EEO/Affirmative Action Reports” chapter for details on how to generate these reports:

- List EEO Applicant Summary
- List EEO Employment Activity
- List Application Log

Printing List Applicants Data Report

To print the most comprehensive of the three reports within the *List Applicant Data* function, follow these steps:

1. From the Infinium HR main menu select *Applicant Administration*.
2. Select *List Applicant Data.*
3. Select *List Applicant’s Data* [LA]. The system displays the screen shown in Figure 3-8.

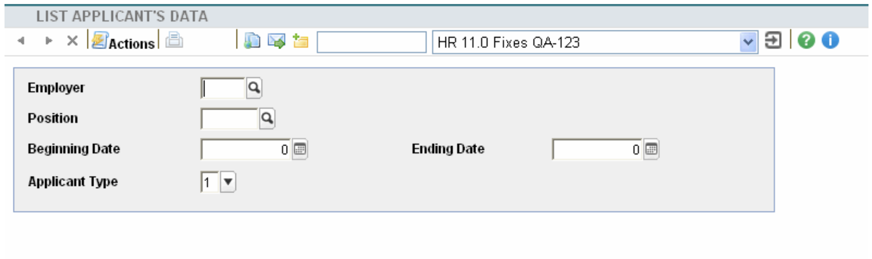


Figure 3-8: List Applicants Data screen

4 Use the information below to fill in the fields on this screen.

The only field required for the system to generate the List Applicants Data report is *Applicant Type*.

If you leave the four optional fields blank and press Enter, the system generates a report of all specified applicants for all employers.

Employer

Type the value that represents the employer whose applicants you want to display in the report. Or, leave this field blank to generate information for all employers.

Position

Type the code value that represents the applied-for position for which you want applicant information on the report. Or, leave this field blank to generate a report of applicants for all applied-for positions.

Beginning Date

Type the first or earliest date the system should use to select applicants for this report. This date is compared to each applicant's *Application Date*; only information for applicants whose *Application Date* is equal to or greater than this date are included in this report.

Ending Date

Type the last date the system should use to select applicants for this report. This date is compared to each applicant's *Application Date*; only information for applicants whose *Application Date* is equal to or earlier than this date are included in this report.

Applicant Type

Specify which applicants should be included in this report.

Ending Date

Type the last date the system should use to select applicants for this report. This date is compared to each applicant's *Application Date*; only information for applicants whose *Application Date* is equal to or earlier than this date are included in this report.

Applicant Type

Specify which applicants should be included in this report.

0	List all applicants both hired and unhired.
1	List only unhired current applicants.
2	List only hired former applicants.

5 After you type information in the selection field(s) you require, press Enter. The system produces the following message at the bottom of the List Applicants Data selection screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system uses batch processing to generate the List Applicants Data report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print this report using options on these screens. A sample applicant report is shown on the following page.

```
PEGPAP     PETPAP                              A P P L I C A N T    R E C O R D S        PERIOD BEGINNING   7/01/2000   Page   1
 7/19/00                                        UNHIRED APPLICANTS ONLY
EMPLOYER ZUS  SAMPLE US COMPANY                 POSITION APPLIED FOR  101200 ACCTS PAYABLE ACCOUNTANT
                                                        DATE OF            MARITAL     DATE OF                               SKILLS
NAME & ADDRESS                          TAX ID NUMBER   BIRTH   ETHNIC SEX STATUS    APPLICATION                    STATUS   TEST
-------------------------------------------------------------------------------------------------------------------------------------
SAM              FANTASTIC                                                              7/15/2000
                                                                   LANGUAGE                                        TRAVEL LIMITS
                                                                   LICENSE #                       HEIGHT  000    WEIGHT  000
                       NO. DEPENDENTS 00  RELOCATABILITY CODE
CITIZEN OF             PLACE OF BIRTH                    VISA COUNTRY     VISA TYPE       EXPIRE DATE           VISA#
ALIEN NUMBER
SECURITY CLEARANCE:     NUMBER                              CLEARANCE TYPE        DATE                      DENIED   EX-FELON?
MILITARY INFORMATION:   VETERANS CODE                       BRANCH                MILITARY OCCUPATION
                        DISCHARGE DATE                      DISCHARGE TYPE
CURRENTLY EMPLOYED? 0 BY                                        CONTACT EMPLOYER?   PREVIOUS APPLICATION DATE
RESTRICTIONS          HANDICAP CODE          EMPLOYEE NUMBER IF HIRED          HIRE SOURCE
RELATIVES EMPLOYED BY COMPANY                                         FRIENDS EMPLOYED BY COMPANY
REFERENCES:
COMMENTS:                               ROUTE RESUME
POSITION(S) APPLIED FOR
-----------------------
POSIT   POSITION DESCRIPTION                      SHIFT PREF   POSIT PREF  SCHED PREF DATE APPLIED     SALARY REQUIRED
101200  ACCTS PAYABLE ACCOUNTANT                                  01                  7/15/2000                 .00
```

Printing the List Applicant Interviews Report

The second report available in the *List Applicant Data* function prints applicant interview data. Follow these steps to generate this report:

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *List Applicant Data.*

3 Select *List Applicant's Interviews* [LAI].

The system displays the screen shown in Figure 3-9.

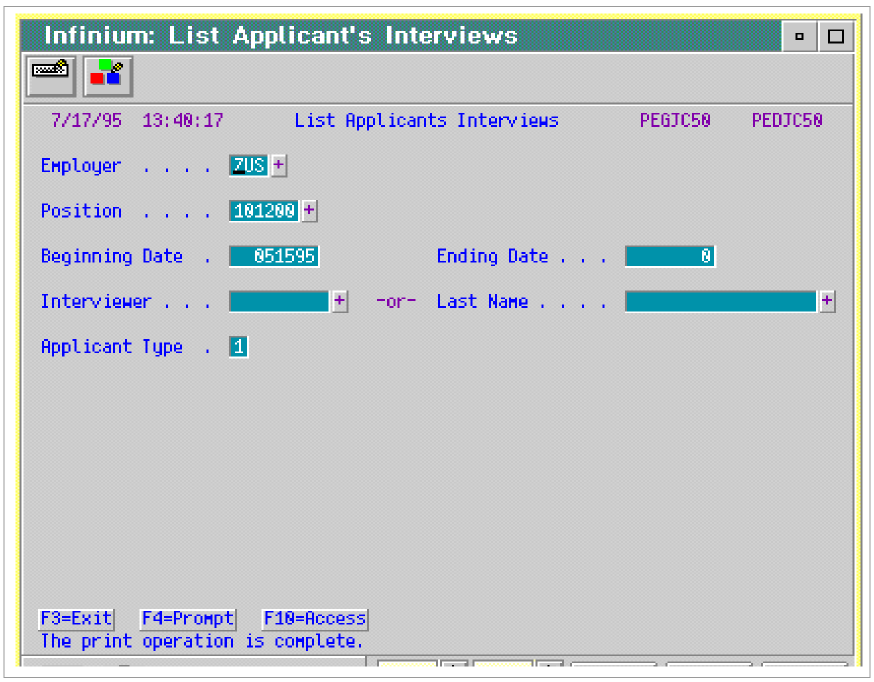


Figure 3-9: List Applicants Interviews screen

4 Use the information below to fill in the fields on this screen.

The only field required for the system to generate this report is *Applicant Type*.

If you leave all of the six optional fields blank and press Enter, the system generates a report of all applicant interviews in all employers.

Employer

Type the value that identifies the employer whose applicant interviews you want to display in the report. Leave this field blank for information about all interviews to display on this report.

Position

Type the code value that identifies the applied-for position that the system should use to select applicants for this report. Press F4 to display a list of position codes defined for the specified employer. Leave this field blank for information about interviews for all applied-for positions to display on this report.

Beginning Date

Type the earliest date for which you want information to display on this report. This date is compared to each applicant's *Interview Date*; only applicants whose interview date is equal to or later than this date are included in this report.

Ending Date

Type the last date the system should use to select applicants for this report. This date is compared to each applicant's *Interview Date*; only applicants whose interview date is earlier than or equal to this date are included in this report.

Leave the *Beginning Date* and *Ending Date* fields blank for information for all applicant interview dates to appear on this report.

Interviewer

Type the employee number of the interviewer that the system should use to select applicants for this report. This employee number is compared to the interviewer's employee number on the applicant's interview record; only applicants who interviewed with this interviewer are included on this report. You can press F4 to display a list of employees in the selected employer.

Last Name

Type the last name of the interviewer that the system should use to select applicants for this report. You can press F4 to display a list of employees in the specified employer. Select the appropriate employee from the list and press Enter to fill this field and the *Interviewer* field described above.

Applicant Type

Specify which applicants should be included in this report:

0	List all applicants both hired and unhired.
1	List only unhired current applicants.
2	List only hired former applicants.

5 After you type information in the selection field(s) you require, press Enter. The system produces the following message at the bottom of the List Applicants Interviews selection screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system generates the List Applicants Interviews report using batch processing. From the Infinium HR main menu, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print this report using options on these screens. A sample of the report is shown on the following page.

```
PEGPAI     PETPAI                         A P P L I C A N T   I N T E R V I E W S       PERIOD BEGINNING   5/15/1995   Page   1
 7/17/95   13:45:07                             UNHIRED APPLICANTS ONLY                                 ENDING
EMPLOYER ZUS  SAMPLE US COMPANY/FOR DOC USE        POSITION APPLIED FOR  101200  ACCTS PAYABLE ACCOUNTANT
                                           DATE OF
APPLICANT NAME                            INTERVIEW    TIME    LOCATION                 INTERVIEWER
-----------------------------------------------------------------------------------------------------------------------------------
ALPHA             ANNA               A     7/10/1995   14:30   OFF-SITE
RESULT: OFFER OFFER EXTENDED                COMMENT: EXCELLENT CANDIDATE

BETA              BARNEY             B     6/26/1995   15:00   ADMIN. BUILDING
RESULT: REF2  REFER FOR SECOND INTERVIEW     COMMENT:

ALPHA             ANNA               A     6/23/1995    9:00   HEADQUARTERS
RESULT: REF2  REFER FOR SECOND INTERVIEW     COMMENT:
```

Printing the List Recruitment Costs Report

The third report available in Applicant Administration lists the Recruitment Costs. To generate this report, use the following steps:

1 From the Infinium HR main menu select *Applicant Administration*.

2 Select *List Applicant Data.*

3 Select *List Recruitment Costs* [LRC].

The system displays the screen shown in Figure 3-10.

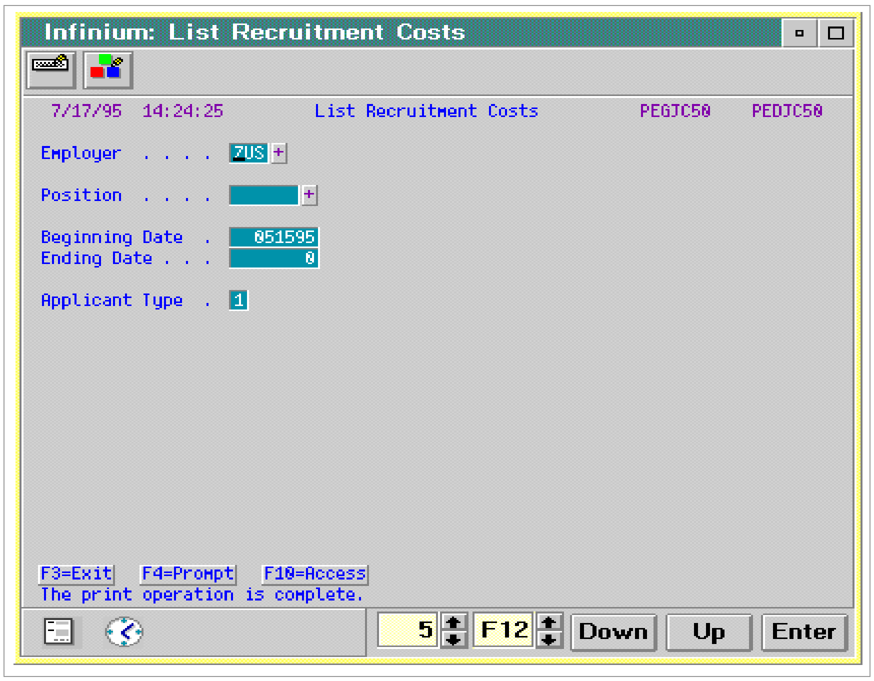


Figure 3-10: List Recruitment Costs screen

4 Use the information below to fill in the fields on this screen.

The only field required for the system to generate this report is *Applicant Type*.

If you leave the four optional fields blank and press Enter, the system generates a report of all recruitment costs in all employers.

Employer

Type the value that identifies the employer whose applicants you want to display in the report. Leave this field blank for recruitment cost information for all employers to display on this report.

Position

Type the code value that identifies the position that the system should use to select recruitment costs for this report. Press F4 to display a list of position codes defined for the specified employer.

Beginning Date

Type the earliest date for which you want information to display on this report. This date is compared to each recruitment cost; only costs incurred on or after this date are included in this report.

Ending Date

Type the last date the system should use to select costs for this report. This date is compared to the date recorded for each costs; only costs incurred on or before this date are included in this report.

Leave the *Beginning Date* and *Ending Date* fields blank for information for all recruitment costs to display this report.

Applicant Type

Specify the type of applicant for which recruitment costs should be included in this report:

0	List all applicants both hired and unhired.
1	List only unhired current applicants.
2	List only hired former applicants.

5 After you type information in the selection field(s) you require, press Enter. The system produces the following message at the bottom of the *List Recruitment Costs* selection screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system generates the List Recruitment Costs report using batch processing. From the Infinium HR main menu, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work

with Printer Output screen. You can view or print this report using options on these screens. A sample of this report is shown on the following page.

```
PEGPRA     PETPRA                                   R E C R U I T M E N T   C O S T S     PERIOD BEGINNING   5/15/1995   Page   1
 7/17/95                                                 UNHIRED APPLICANTS ONLY
EMPLOYER ZUS  SAMPLE US COMPANY/FOR DOC USE
                                         DATE OF
APPLICANT NAME                             COST          COST   COST TYPE                             POSITION
-----------------------------------------------------------------------------------------------------------------------------------
BETA              BARNEY              B  6/23/1995       50.00 MEALS  MEALS EXPENSE                   101200  ACCTS PAYABLE ACCOUNTAN
BETA              BARNEY              B  6/23/1995       33.00 AUTO   AUTOMOBILE RENTAL/MILEAGE       101200  ACCTS PAYABLE ACCOUNTAN
ALPHA             ANNA                A  6/22/1995     1000.00 AIR    AIR FARE                        101200  ACCTS PAYABLE ACCOUNTAN
ALPHA             ANNA                A  6/22/1995      100.00 HOTEL  HOTEL ROOM                      101200  ACCTS PAYABLE ACCOUNTAN
                                         5/15/1995      300.00 ADVRT  ADVERTISING EXPENSE             101200  ACCTS PAYABLE ACCOUNTAN
** TOTAL FOR POSITION                                 1,483.00
 * TOTAL FOR EMPLOYER                                 1,483.00
```

□

Chapter 4 Entering New Hires Overview

4

This chapter contains an overview of entering information about a new employee, including the records created by *Enter New Hire*.

The chapter consists of the following topics:

Objectives

When you complete this chapter you should be familiar with:

- Reasons for selecting either the *Enter New Hire* or the *Update Employee Data* function
- Records that the system creates when you hire an employee through *Enter New Hire*
- How system security can affect the *Enter New Hire* process
- Where to find detailed information on using the various methods of hiring new employees

Comparing the Two New Hire Methods

Method 1: The *Enter New Hire* Function

The *Enter New Hire* function is accessible by two paths; this guide refers to both as *Enter New Hire*:

- Infinium HR *Employee Data / Update Employee Data / Enter New Hires* [HIRE]
- Infinium PY *Employee Data / Update Employee Data / Enter New Hire* [ENH]

Enter New Hire uses default information from position controls and, if specified on the employer control, position defaults. Perform the following tasks before using the *Enter New Hire* function:

- Define the Infinium HR position controls.
- Optionally, define the Infinium HR position defaults
- If entering new hire information in Infinium PY, you must also be using Infinium HR.

Refer to the next two parts of this guide for detailed instructions.

Method 2: The *Update Employee Data* Function

The *Update Employee Data* new hire feature is available in Infinium HR and Infinium PY. You do not need Infinium HR position controls. You can therefore use this method in Infinium PY without Infinium HR.

Because this function does not use defaults from Infinium HR position controls, it is less accurate and less efficient than *Enter New Hire*.

This method presents different screens than *Enter New Hire* and creates different records. Refer to Appendix A of the *Infinium HR Guide to Processing* or the “Update Employee Data” chapter of the *Infinium PY Guide to Processing* for details about this method.

Understanding the *Enter New Hire* Process

Enter New Hire provides an efficient and accurate method for entering new employees into your system, allowing you to set up a full range of controls and information for each new employee.

Enter New Hire takes you through a specific set of screens, ensuring consistent set up for all employees. The use of default information also reduces keying time and errors.

Enter New Hire works only in conjunction with Infinium HR position controls. You must first create Infinium HR position controls.

Default Information from Infinium HR Position Controls

Infinium HR position controls contain information such as the position name, level assignments for employees working in this position, job information, personnel benefit groups and so forth. Refer the *Infinium HR Guide to Controls* for additional information on position controls.

In *Enter New Hire*, you specify the position immediately after specifying the employee. The system uses default information from the position control to fill in many fields on the *Enter New Hire* screens.

After hiring the employee, you can change the default information through *Update Employee Data* in either Infinium PY or Infinium HR. You cannot use *Enter New Hire* to update existing employee records.

Default Information from Infinium HR Position Defaults

Infinium HR position defaults include information that is used in payroll processing. The default information includes the following:

- Tax company for multi-tax processing
- The state where the employee in the specified position is paid
- The SUTA state
- A miscellaneous location where the employee in the specified position is paid

- The county where the employee in the specified position is paid
- The city where the employee in the specified position is paid
- The school district where the employee in the specified position is paid
- Whether to print the employees' ID on the pay check for employees assigned to the specified position
- Whether to print rates or units on the pay stub for employees assigned to the specified position

Enter New Hire Screens and the Records Created

The system uses information from the *Enter New Hire* screens to establish various records within Infinium HR and Infinium PY as indicated in the following descriptions and the accompanying chart.

Screens 1 through 5

On screens 1 through 5 you specify personnel and payroll information for the new employee. The system uses the information from these screens to create the following records:

- Employee basic data records

  Includes such important information as the employee's name and address, reporting levels, position, job code, personnel base rate and hire date. You can update this record from either Infinium PY or Infinium HR.

- Employee personnel data record

  Contains personal information including citizenship, military and marital status as well as emergency contacts.

- Employee payroll data record

  Contains pay cycle, pay rates, auto pay and payroll authorization group information in addition to tax information.

Screen 6 through 8

On screens 6, 7 and 8, you can enter user-defined employee data for both Infinium HR and Infinium PY. The system uses the information from these screens to establish the employee user-defined data record which contains any employee specific information that is unique to your organization and not tracked elsewhere in Infinium HR. Both Infinium PY and Infinium HR can store information in this record.

You are not required to use the user-defined data screens. You can establish field names and code values for your user-defined fields based on your business requirements.

To establish user-defined fields and code values, use the following:

- The *Update User Defined Titles* function to define the field names for up to 10 code fields, 10 date fields, 10 amount fields, 10 hour fields, 20 character fields, 10 numeric fields and one lengthy comment field
- The *Update Employer Codes* to define the codes that are to be available for the code fields

For more information on defining user-defined fields and their codes, refer to the *Infinium HR* or *Infinium PY Guide to Controls*.

Screens 9 and 10

On screen 9 you specify payroll income authorization information. On screen 10 you specify deduction authorization information. The system uses the information from these screens to create the following records:

- Employee income authorization records

  Contains authorizations to specific incomes for an employee.

- Employee deduction authorization records

  Contains authorizations to specific deductions for an employee.

Screen 11

You can use screen 11 to enter benefit enrollment information for the new employee. You must first establish your benefits plans through the Infinium HR *Benefits Administration* module.

This screen displays a list of the benefit plans for which the employee is eligible, based on the personnel benefit croup code you specified on screen 2. Selecting plans from this list creates the employee benefit enrollment records that contain enrollment information for each plan including eligibility date, employee and employer costs and associated dependents or beneficiaries. The system processes these pending enrollments when you use Infinium HR function *Mass Update Enrollments*.

Screen 12

Use the Employee Topic List selection screen to select an employee topic to update or display depending upon the topics to which you are authorized.

Summary of Screens and Records

The diagram on the following page summarizes the records created from the information at these *Enter New Hire* screens.

Records Created by the *Enter New Hire* Function

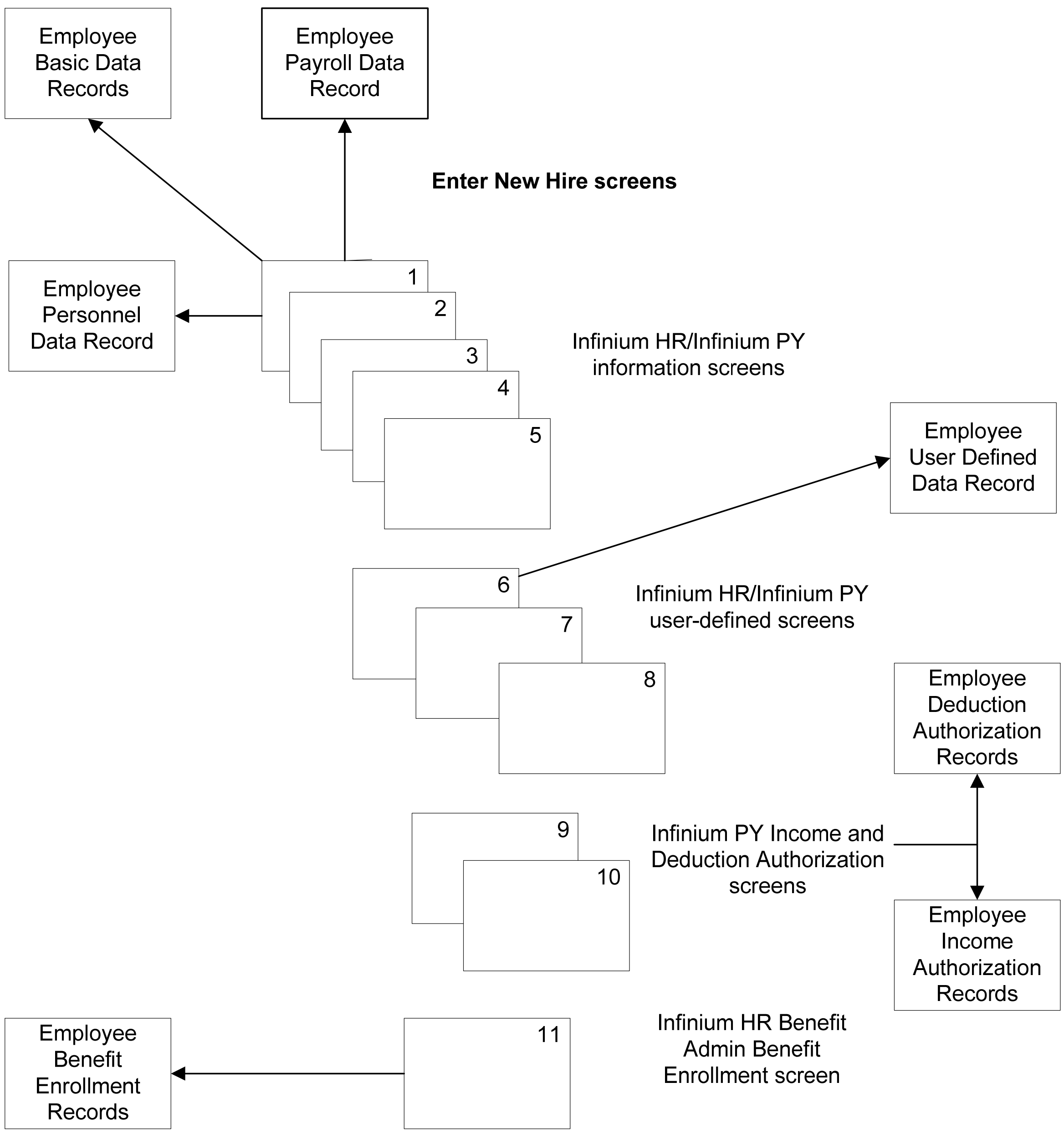


Figure 4-1: Records Created by the Enter New Hire Function

Restricting Access to *Enter New Hire* Screens

Your system administrator can restrict access to specific *Enter New Hire* screens by user profile within Infinium HR/PY security. For example, your organization may grant Human Resources department users access to *Enter New Hire* screens 1 through 5 and 11, omit user-defined data screens for all users, and have your payroll department users complete income and deduction authorization information in *Update Employee Data* rather than in *Enter New Hire*.

If security restrictions are established, you might see only some of the *Enter New Hire* screens described in this guide. Security can omit any combination of the following *Enter New Hire* screens or screen groups.

Screen or Screens	Contents
3	Payroll Information
Accessed from screen 2	Foreign National Salary Data
4	Miscellaneous Information
5	Paid Time Off Accrual Information
6, 7 and 8	User-defined Data
9	Employee Income Authorizations
10	Employee Deduction Authorizations
11	Benefit Enrollments
12	Employee Topic List

The administrator establishes these access restrictions through the Infinium HR and Infinium PY *Update User Security Controls* functions.

Refer to the *Infinium HR* and *Infinium PY Guide to Management Functions* for additional information on establishing security.

Accessing the Employee Topic List during the New Hire Process

You can access Employee Topic List topics during the *Enter New Hire* process. Depending upon your security restrictions, the system displays the Employee Topic List selection screen after you display the last standard screen in the sequence of Enter New Hire screens. Text on the Employee Topic List selection screen informs you of how you accessed the screen. If access is through the *Enter New Hire* process, the text is **Access: New Hire**. If access is through the *Employee Topic List* function, the text is **Access: From Menu**.

User security controls for Employee Topic List access through the Enter New Hire process

Use the *Update User Security Controls* function to define user security for using the *Employee Topic List* function during the *Enter New Hire* process. You specify access to the *Employee Topic List* function through the *Enter New Hire* process in the *EE Topic List?* field in the Screen Selection for Enter New Hire section of the User Security Update screen. You specify the new hire topic group that can access the *Enter New Hire* process in the *New Hire Topic Gp* field on the User Security Update screen.

Use the *Update Topic List Groups* function to associate topic list topics to a group of users.

See the “Using System Operations Functions” chapter in the *Infinium HR Guide to Management Functions* for more information.

Notes

Chapter 5 Hiring New Employees into US Employers

5

This chapter describes using *Enter New Hire* for new employees you pay in the United States.

The chapter consists of the following topics:

Overview of the Hiring New Employees into US Employers Process

In this chapter you learn to use *Enter New Hire* to hire employees you pay in the United States. This chapter presents information on all of the *Enter New Hire* function screens. Depending on your security restrictions, you may not have access to all of these screens.

Enter New Hire is included in both Infinium HR and Infinium PY. You obtain identical results regardless of which system you use to hire employees. *Enter New Hire* automatically creates records for the new employee on both Infinium HR and Infinium PY.

Objectives

When you complete this chapter you should be familiar with how to use *Enter New Hire* to establish information for new employees.

Entering New Hires

The Enter New Hire Screens

If you have access to all of the *Enter New Hire* screens, the system identifies them and presents them in the order shown below. The prompt screen for the *Enter New Hire* function is not included in this list.

The displayed page number in this table changes if you are restricted from accessing one or more of these screens. For example, if you are not allowed to access the Payroll Information screen, the Contact and Miscellaneous Information screen displays “3 of 7” rather than “4 of 8” since this is now the third of the seven you can access.

Enter New Hire Screens

Order	Description	Displayed page number
1	Enter New Hire	1 of 8
2	Enter New Hire (with access to additional I-9 and foreign national data screens)	2 of 8
3	Payroll Information	3 of 8
4	Contact and Miscellaneous Information	4 of 8
5	Paid Time Off Information (with access to additional PTO screens)	5 of 8
6	Employee User Data	1 of 3
7	Employee User Data	2 of 3
8	Employee User Data	3 of 3
9	Update Employee Income Codes	None
10	Update Employee Deduction Codes (with access to authorization details screens)	None

Enter New Hire Screens

Order	Description	Displayed page number
11	Update Employee Benefit Enrollments (with access to enrollment details screens)	None
12	Employee Topic List selection screen	None

Choosing Whether to Re-Use Applicant Information during Hiring

During use of *Enter New Hire*, you can choose to bring existing applicant information into the *Enter New Hire* basic data fields. This is information previously entered through the Infinium HR *Update Applicant Data* function.

Advantages

Using the existing applicant information during *Enter New Hire* expedites the hiring process regardless of whether you use *Enter New Hire* in Infinium HR or Infinium PY.

The information you can bring in from the applicant record includes such items as the applicant's address, home telephone number and applied-for position. You can update any incomplete or outdated information in *Enter New Hire*.

Method

Specify the applicant in the *Applicant Name* field at the *Enter New Hire* prompt screen. You can type the name or you can press F4 to display a selection list of applicants.

If you select an applicant from the prompt list, the system displays key information from the applicant record on the prompt screen so that you can verify that you selected the correct applicant before you continue.

Automatic Update to Applicant Record

If you use applicant data and complete the *Enter New Hire* procedure, the system automatically updates the applicant's record to indicate that the applicant has been hired. The applicant record remains in Infinium HR so that you can do analysis and generate reports for applicant data.

Entering a New Hire

Accessing the *Enter New Hire* Function

Perform the following steps to access the *Enter New Hire* function:

1 From the Infinium HR or Infinium PY main menu select *Employee Data.*

2 Select *Update Employee Data.*

3 In Infinium HR, select *Enter New Hires* [HIRE]. In Infinium PY select *Enter New Hire* [ENH].

The system displays the Enter New Hire prompt screen.

Processing the Enter New Hire Prompt Screen

The Enter New Hire prompt screen provides fields for specifying the employer, employee number, and, if you are re-using data from the applicant record, the applicant being hired.

1 Use the following information to complete the fields on this screen:

The *Employer* field is the only field that you must complete.

Employer

Specify the employer for which the new employee will work.

Employee

Use one of the following methods to assign an employee number:

- Leave the *Employee* field blank to allow the system to automatically assign the employee number based on the value in the *Next Employee #* field on the entity control record.
- Type the employee’s tax identification number in the *Employee* field. The system copies this number to the *Tax ID #* field on *Enter New Hire* Screen 1.
- Type a user-defined number in the *Employee* field.

For additional information on selecting a method of assigning employee numbers, refer to the “Setting up Entity and Employer Controls” chapter of the *Infinium HR Guide to Controls* or the “Setting up the Entity Control” chapter of the *Infinium PY Guide to Controls*.

Applicant Name

If you track applicant information in Infinium HR, you can specify an applicant in this field to default information from the applicant data record into the new employee record.

Do one of the following:

- If not using default information from an applicant record, leave this field blank and press Enter to continue directly to Enter New Hire screen 1 (Basic Personal Data).
- Type the applicant's name, and press Enter to continue directly to Enter New Hire screen 1 (Basic Personal Data). The system supplies default information on Enter New Hire screen 1 (Basic Personal Data).
- To view applicant information before specifying an applicant and verifying the selection at this prompt screen, press F4 and continue to the next step.

Selecting an Applicant from the Applicant List

2 Use the following information to work with the list of applicants:

Locate

If you do not see the new employee's applicant record on the first Applicants screen, you can press PageDown to scroll through the list of applicants. To expedite locating the applicant record, type some or the entire employee's last name in the *Locate* field at the top of the screen, and then press Enter. The system locates the specified applicant's record and displays it on a separate Applicants screen.

Opt

Type any character in this field to select the applicant.

Local ID

Use this field only when processing for localized situations, for example, Macau. See the *Guide to Localized Setup and Processing* for more information.

Or Passport

Use this field only when processing for localized situations, for example, Macau. See the *Guide to Localized Setup and Processing* for more information.

3 Press Enter to return to the Enter New Hire prompt screen.

Verifying the Applicant at the Prompt Screen

4 The bottom portion of the screen displays any of the following information that is available from the applicant record: last name, social security or social insurance number and address. Use the following information to work with this screen:

Verify that you selected the correct applicant. You cannot make changes to this information on the Enter New Hire prompt screen, but you can update the information on the screen that follows.

5 Press Enter. The system displays Enter New Hire screen 1 (Basic Personal Data).

Processing Enter New Hire Screen 1 (Basic Personal Data)

Enter New Hire screen 1 provides fields for basic personal data such as tax ID, name, address, gender, birth date, marital status, and emergency contact information, as well as the employment position and date hired.

If you specified an applicant at the prompt screen, Enter New Hire screen 1 (Basic Personal Data) supplies any default information that is present in the applicant's record. There may be few or many defaults since most applicant data is optional. If the applicant applied for more than one position, the system supplies the position that the applicant specified as a first preference.

The only fields that cannot automatically display default values from the applicant record are *Common Name*, *Date of Hire*, *Marital Status* and the fields found in the Emergency Information section of the screen.

Required Information

The following information is required at this screen: tax ID, hire position, date of hire, last name, first name, address, city/town, state/province, date of birth, sex and marital status.

Field Information

1 Use the following information to complete the fields on this screen:

Tax I.D. #

If you are using the tax identification number as the employee number, this field displays the number you typed in the *Employee* field on the Enter New Hire prompt screen.

Specify the employee's tax identification number (Social Security Number in the U.S., Social Insurance Number in Canada) with or without hyphens. If you do not type the hyphens, the system later supplies the hyphens based on the value you enter in the *Payroll Country* field when you press Enter to exit this screen.

Hire Position

Type the code that represents the position into which you are hiring the employee. Press F4 to display a list of potential positions along with their authorized staffing level, current staffing level and openings.

Date of Hire

Type the date of hire of this employee.

Last Name

Type the employee's last name. This is an 18-character field.

Unless you type information in the *Check Name* field on the Enter New Hire Payroll Information screen, the system uses the *Last Name, First Name* and *Middle Name* fields for payroll processing, including check printing and generation of year-end tax forms such as the W-2 and 1099R.

First Name

Type the employee's first name. This is an 18-character field.

Suffix

Type the employee's suffix, such as JR, SR, II, III and so on. The information in this field is used only for W-2 processing.

Middle Initial

Type the employee's middle initial, if applicable. This is a 1-character field.

To include the employee's middle initial or middle name on the W-2 form, type the appropriate value in the *Middle Name* field.

Birth Name

Type the employee's maiden name or name given at birth, if it is different from the employee's current name. This is an 18-character field.

Common Name

You can use this field to type the employee's preferred name or nickname if it is different from the employee's first name. This is a 20-character field. You can use this field to locate the employee after the employee is hired.

If you leave this field blank, the system defaults the employee's first name into this field when you press Enter to exit from this screen.

Middle Name

Type the employee's middle name, if applicable.

This field is used for W-2 processing. If the employee's middle name is longer than the space allowed on the W-2 form, the system uses the first initial of the middle name.

Address

Type the first line of the employee's street address. This is a 30-character field.

Unless you type information in the *Check Address* fields on the Enter New Hire Payroll Information screen, the system uses the *Address, (Line 2), City/Town, State/Province* and *Postal Code* fields for payroll processing, including check printing and generation of year-end tax forms and slips such as the W-2, 1099R, T4 and RL-1.

(Line 2)

If necessary, type the second line of the employee's street address.

City/Town

Type the name of the city or town in which the employee resides.

State/Province

Specify the state or province in which the employee resides. You define code values for this field using code type **STA**.

If you defined default *State/Province* values in your Infinium HR employer or level controls, the system supplies the default here.

Postal Code

Type the employee's postal or ZIP code. This is a 10-character free-form field. When entering U.S. employees, you can type a standard five-digit zip code followed by a hyphen and four digit extension.

Use the *Reqr Postal Code?* field in the *Update Employer Controls* function to require users to enter a postal code when using the new hire process, updating basic data, or working with Personal Change transactions in the *Enter Personnel Actions* function.

Country

Specify the country where the employee lives. You define country codes through *Update Employer Codes*, using code type **CTR**.

If you leave this field blank, the system assumes the employee's residence country is **USA**.

If you defined a default country value in your Infinium HR employer or level controls, the system supplies the default here.

County

Type the code that represents the county in which the employee lives. You establish code values for counties through the *Update Employer Codes* option, using code type **CNT**.

Payroll Country

Type the code that represents the country in which the employee works and to which you report the employee's wages. You establish code values for countries through the *Update Employer Codes* option, by using code type **CTR**.

Valid values for payroll processing are:

USA	United States
CAN	Canada

If you leave this field blank, the system assumes the employee's payroll country is **USA**.

If you establish a default value for the *Country* field when you set up your employer control or level control records on Infinium PY, that value becomes the default in this field for new hires.

User Field 1

Type the code value to be used with custom programming. The code type used for this field is U11.

Home Tel No

Type the employee's home telephone number. This is a 19-character free-form field. The system does not edit this field for format or area code. You can include the area code or other international codes; if you do, you can use any character (such as parentheses or dashes) to separate the codes from the rest of the telephone number.

For example, you can type **508-555-1212** or **(508) 555-1212** for U.S. and Canadian telephone numbers. For international numbers you can type the number using the appropriate format for each country such as **011-44-333-444555** for telephone numbers in the United Kingdom.

Infinium HR and Infinium PY users that use the *Enter New Hire* function should agree on a consistent format for this field in order to ensure compatible data for displays and reports.

User Field 3

Type a code value to be used with custom programming. The code type used for this field is U12.

Date of Birth

Type the employee's date of birth using the appropriate date format for this employer.

You specify the date format for your employer when you create the employer control. Refer to the *Infinium HR or Infinium PY Guide to Controls* for additional information.

Sex

Type either:

M	Male
F	Female

Marital Status

Type the employee's actual marital status. This is an informational field only. The system does not use this field for tax calculations.

Type one of the following values:

M	Married
S	Single
D	Divorced
W	Widowed
P	Separated

O Other

Emergency Information

Type the name, address and telephone number of an emergency contact for this employee.

You can maintain the emergency contact information you enter here through the *Update Emergency Contact* function. The contact you enter here is the primary emergency contact.

All fields, with the exception of the *Relationship* field, are free-form and do not require special values. If you type a contact name, type a relationship code value in the *Relationship* field. If you type a contact name and choose to leave the *Relationship* field blank, press F21, or click Override from Actions on the Web, to continue with the new hire transaction.

You create code values for use in the *Relationship* field through the *Update Employer Codes* option by using code type **REL**.

2 Press Enter. The system displays Enter New Hire screen 2 (Employment Data).

Processing Localized Payroll Information

You can enter localized payroll information when you enter a new hire. To process localized payroll information you press F19 on the first Enter New Hire screen to display the Update Macau Name and Address screen.

For information about using the Update Macau Name and Address screen, see the *Guide to Localized Setup and Processing*.

Processing Enter New Hire Screen 2 (Employment Data)

Enter New Hire Screen 2 provides fields for employment data such as status (full or part time and so forth), base salary rate, frequency and number of hours to be worked, job and payroll rates for multiple jobs such as teaching at one rate and coaching athletics at a different rate, and performance review scheduling.

1 Use the following information to complete the fields on this screen:

The system supplies any of the following default information that is available in the applicable position controls:

- Position

- Levels
- Shift code
- PE benefit group
- Job code

The system supplies any of the following default information that is available in the applicable job controls:

- Personnel base rate
- Payroll rate or rates
- Pay grade
- Step-in-Grade step, next step and next step date

  This screen displays fields for this information only if this position is associated with step-in-grade processing

- Next review type and next review date

Use the following field information to type new information or override default information on this screen, as necessary:

Status

Type the employee's active employment status code. You must establish status values through the *Update Employer Codes* option, using code type **STS**.

Personnel Rate

Type the base rate that your Personnel department uses for this employee. This field can contain hourly, monthly, annual or several other types of rates.

If the rate is outside the salary range for this job, the system displays a warning message when you try to exit this screen. You can either correct the rate or press F21 to override the warning.

The rate must be compatible with the value in the *Base Frequency* field. For example if you type a monthly salary amount in this field, you must type **M** (monthly) in the *Base Frequency* field.

Infinium PY does not calculate pay based on the information in this field; however, Infinium HR uses this rate in Personnel reports and to calculate the employee's annualized base rate.

If you use Infinium HR benefits administration and your employer calculates life insurance based on a multiple of base rate, the system uses the personnel base rate in this field to calculate life insurance coverage when you enroll the employee in a life insurance plan. The system can use other fields to compute life insurance coverage including the *Base Frequency*, *Scheduled Pay Pds* and *Regular Hours* fields.

Scheduled Pay Pds

Type the number of pay periods scheduled during the calendar year for this employee. If you do not state the employee's Personnel rate on an annual basis, the system uses the value you enter in this field in conjunction with the value you enter in the *Regular Hours* field to annualize the employee's Personnel rate.

If your employer calculates life insurance based on a multiple of base rate, the system includes this value in the calculation of coverage as indicated in the description of the *Personnel Rate* field.

Information from the *Scheduled Pay Pds* field is also included in various Infinium HR reports.

Base Frequency

Specify a frequency for the rate you typed in the *Personnel Rate* field.

Valid frequencies are:

H	Hourly
D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
A	Annually
10	10 pay periods per year
13	13 pay periods per year
22	22 pay periods per year
27	27 pay periods per year
53	53 pay periods per year

If your employer calculates life insurance based on a multiple of base rate, the system includes this value in the calculation of coverage as indicated in the description of the *Personnel Rate* field.

The system also includes the *Base Frequency* field in various Infinium HR reports.

Regular Hours

Type the number of regular hours per pay period that this employee is expected to work. The value you type in this field must be compatible with the amount you type in the *Scheduled Pay Pds* field. For example, if you type **40** regular hours in this field, you would probably type **52** in the *Scheduled Pay Pd* field. The system can use information in this field to generate auto pay entries for the employee during cycle processing, or you can establish auto pay groups to generate time entry records.

If your employer calculates life insurance based on a multiple of base rate, the system includes this value in the calculation of coverage as indicated in the description of the *Personnel Rate* field.

Information from the *Regular Hours* field also displays in various personnel specific reports.

Ethnicity/Race

Type the one-character ethnic identification code. You must establish ethnic code values in the *Update Employer Codes* option using code type **ETH**.

Shift Code

If this employee's position is associated with a particular shift, type the appropriate shift code in this field. You define values for this field using code type **SFT**.

If you specified a shift code on the position control record to which this employee is assigned, the system uses that value as the default for this field.

Step-in-Grade Fields

If this employee's position is not associated with step-in-grade processing, the system displays only the *Pay Grade* field. If the position is associated with step-in-grade processing, the system also displays the *Step*, *Next Step* and *Next Step Date* fields.

The default information is from the pay grade you assign to the job control linked to the position. The default personnel rate and payroll rates are from the pay grade table.

You can use the following information to modify the step-in-grade controls for this employee, as necessary:

- *Pay Grade*

  You cannot override a default value in this field if using step-in-grade processing for this employee.

  If using the pay grade for other purposes, type the grade to which the employee is assigned.

- *Step*

  Type a new step in this field to assign this employee to a starting step other than the default specified on the job control record.

- *Next Step*

  You can override the default.

  The employee advances to this next step after meeting criteria that you set up in the *Update Pay Grade and Steps* function. You execute the *Mass Update Employee Steps* function to advance the employee to the next step.

  Whether you override this value or not, the system sets the value in the *Step Override?* field on screen four of the employee's basic data record to **0** to apply hours-worked requirements specified on the pay grade control, if applicable.

- *Next Step Date*

  You can override the default value from the *Update Pay Grade and Steps* function. This is the date that the employee is scheduled to advance to the pay grade step specified in the *Next Step* field.

  Leave this field blank if progression to the next step is based on hours worked and not on length of service.

  The system uses criteria from the step to which the new employee is assigned to determine the next step date. When you execute the *Mass Update Employee Steps* function on or after the next step date, the system advances the employee to the next step provided the employee meets hours-worked requirements specified on the pay grade control.

  Whether you override this value or not, the system sets the value in the *Step Override?* field on screen four of the employee's basic data record to **0** to apply hours-worked requirements specified on the pay grade control, if applicable.

Next Review

This code represents the type of performance review the new employee will receive. You can override the default. You establish code values for this field through the *Update Employer Codes* option using code type **RTP**.

If you type a value in this field, you must also enter a value in the *Next Review Date* field.

You can maintain this information through the *Enter Personnel Actions* option in Infinium HR.

Next Review Date

To override the default date for the employee's next performance appraisal, type a different date in this field.

If you type a date in this field, you must type a value in the *Next Review* field.

PE Benefit Group

If you use the *Benefits Administration* function in Infinium HR and you created personnel benefit groups, you can use this field to assign the employee to a benefit group.

You can retain the personnel benefit group code that defaults from the position control record or you can type an override personnel benefit group code in this field.

When you type a code for a benefit group in this field, the system displays a screen at the end of the *Enter New Hire* option from which you can enroll the employee into authorized benefit plans.

Pay Frequency

Type a pay frequency that indicates how often you expect to pay this employee.

The value you type in this field must be compatible with the value you type in the *Scheduled Pay Pds* fields. For example, if you type **52** in the *Scheduled Pay Pds* field, type **W** in this field.

Type one of the following frequencies in this field:

D	Daily
W	Weekly

B	Biweekly
S	Semimonthly
M	Monthly
10	10 pay periods per year
13	13 pay periods per year
22	22 pay periods per year
27	27 pay periods per year
53	53 pay periods per year

Pay Type

Information in this field defaults from the job control record. The value you type in this field does not affect the personnel base rate you type on this screen. The system uses this field to automatically compute payroll rate(s) when personnel users enter salary change transactions using the *Enter Personnel Actions* function.

The pay type you specify in this field must be compatible with the value you type in the *Payroll Rate 1* field. For example, if you specify **H** (hourly) in this field, the *Payroll Rate 1* field should contain a dollars per hour rate.

Type one of the following values in this field:

S	Salaried: the employee is paid a flat amount per pay period and is exempt from overtime payment requirements.
N	Non-exempt salaried: the employee is paid a flat amount per pay period and is covered by overtime payment requirements.
H	Hourly: the employee is paid by the hour. The employee may or may not be subject to overtime payment requirements.

The system does not use the *Pay Type* field to verify information during payroll cycle processing. You can pay overtime to employees classified as pay type **S** without receiving an error or warning.

Job Code 1, 2 or 3

The value in *Job Code 1* field defaults from the position control to which the employee is assigned. If you want to record additional jobs for this employee, type the applicable job codes in the *Job Code 2* or *Job Code 3* fields.

Job Rate 1, 2 or 3

Type a rate in this field, if you pay this employee by the job. You can refer to the “Pay by Job Processing” chapter of the *Infinium PY Guide to Processing* for additional information.

Payroll Rate 1

You can use the *Payroll Rate 1, Payroll Rate 2* or *Payroll Rate 3* fields to establish payroll rates for this employee. The system uses payroll rate 1 to compute incomes during cycle processing if you entered **B** in the *Income Basis* field on the associated income control record(s).

Typically, the value you type in the *Payroll Rate 1* field is equivalent to the value you enter in the *Personnel Rate* field, even if the rates are stated differently. For example, you can enter the employee’s personnel rate on an annual basis but state the employee’s payroll rate 1 on a weekly or hourly basis. If you enter **25000** as the employee’s annual personnel base rate, you would enter **480.77** as the employee’s payroll rate 1 if you pay the employee on a weekly basis using a flat amount income, or **12.02** if you pay the employee using an hourly income.

You can use the List Employee Base Pay Rates report in Infinium PY’s *List Employee Data* function to verify that the personnel base rate and payroll rate 1 are equivalent for employees even if they are stated differently.

Leave this field blank if you have not defined any income controls whose basis is **B**.

The value you type in the *Payroll Rate 1* field must be compatible with the value you type in the *Pay Type* field on the following screen. For example, if you type a dollar per hour rate in this field, you must specify **H** (hourly) in the *Pay Type* field on the following screen. If you type a flat amount in this field, you should enter **S** (salaried) or **N** (non-exempt salaried) in the *Pay Type* field on the following screen.

Payroll Rate 2

If applicable, type the employee’s second payroll rate. The system uses *Payroll Rate 2* to compute incomes during cycle processing if you entered **2** in the *Income Basis* field on the associated income control record(s). Typically, you use this field for an exception or alternate rate.

For example, in your transportation company you pay truck drivers at their standard hourly rate when they drive alone and a lower hourly rate when they share the driving with another employee. You set up two hourly incomes. The first income for solo drivers uses payroll rate 1; the income for team drivers uses payroll rate 2.

Leave this field blank if you have not defined any income controls whose basis is **2**.

Payroll Rate 3

If applicable, type the employee’s third payroll rate. The system uses *Payroll Rate 3* to compute incomes during cycle processing if you entered **3** in the *Income Basis* field on the associated income control record(s). Typically, you use this field for an exception or alternate rate.

For example, in your school you have some employees who work full-time as teachers and part-time as coaches. They receive two different rates of pay. You set up a flat amount income that uses payroll rate 1 to generate salaried earnings for teachers; you set up an hourly income that uses payroll rate 3 for coaching pay.

Leave this field blank if you have not defined any income controls whose basis is **3**.

ERP LX Shop Fl?

Specify yes if this employee is also an Infor ERP $_{LX}$ shop floor employee. Otherwise, specify no.

Updating Employment Eligibility Data

2 Before exiting this screen, you can press F8 to display the Employment Eligibility Verification screen. You use this screen to enter I-9 information for the new employee. After you complete the Employment Eligibility Verification screen, press Enter to return to Enter New Hire screen 2.

You can enter this information during the new hire process or after the new hire process is complete. See the “Updating Additional Employee Data” chapter of the *Infinium HR Guide to Processing* for further information.

Updating Foreign National Data

3 Before exiting this screen, you can press F9 to display the Update Foreign National Data screen. You use this screen to enter non-domestic compensation information for the new employee. After you complete the Update Foreign National Data screen, press F3 to return to the Enter New Hire screen 2.

You can enter this information during the new hire process or after the new hire process is complete. See the “Updating Additional Employee Data” chapter of the *Infinium HR Guide to Processing* for further information.

Calculating pay rate 1

4 Before exiting this screen, you can press F11 to calculate the *Pay Rate 1* field value. The calculation is based on the values in the *Personnel Rate*, *Base Frequency*, *Regular Hours*, *Pay Frequency*, and *Pay Type* fields.

5 When done with Enter New Hire screen 2, press Enter. The system displays Enter New Hire screen 3 (Payroll Information).

Processing Enter New Hire Screen 3 (Payroll Information)

Enter New Hire screen 3 (Payroll Information) provides fields for payroll information such as pay cycle, federal, state and local withholding related information, the employee’s current state, a payroll authorization group, earned income credit flag, tipping information and the check name and address.

1 Use the following information to complete the fields on this screen:

Pay Cycle

Type the code that represents the regular payroll cycle to which you assign this employee. You must assign each employee to a regular cycle for normal processing. You can process special checks through other cycles, such as a bonus or on-demand cycle; however, you do not assign the employee to a special cycle.

If the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the *Payroll Cycle* value from the position defaults record for the new hire’s selected position is used as the default value for this field.

Auto Pay Group

If you want to generate incomes automatically for this employee during cycle processing, type the code that represents the auto pay group in this field. You create code values through the *Update Employer Codes* option using code type **APG** and assign incomes to the auto pay group using the *Update Auto Pay Groups* function.

If the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the *Auto Pay Group* value from the position defaults record for the new hire’s selected position is used as the default value for this field.

Home Tax Co

For multi-tax processing, type the tax company code to attach this employee to a federal tax company that is different from the tax company on the employer control. Leave blank if the employee is hired under the default tax company or if this is not a multi-tax employer.

PY Auth. Group

Use this field to assign the employee to a pre-defined set of income and deductions.

You establish payroll authorization groups when you set up your system controls. For additional information on establishing payroll authorization groups, refer to the *Infinium PY Guide to Controls*.

If you are using Infinium HR and you specified a value in the *PY Auth Group* field on the Update Organization screen of the *Update Position Data* function, the system uses that value as the default for this field.

This default feature saves time when you are entering new hires. You can override the default value in this field if necessary.

Prt ID on Check

Specify whether to print the employee's tax identification number on the pay stub. Valid values are:

0	Do not print the employee's tax ID on the pay stub.
1	Print the employee's tax ID on the pay stub.
2	Print only the last four digits of the employee’s tax ID on the pay stub and mask the preceding digits with asterisks.

Prt Rates on Chk

Specify whether to print the employee's job codes, rate, and units or hours on the pay stub. Valid values are:

0	Do not print the employee’s rate, hours, total hours, job code, or units on the pay stub.
1	Print the employee’s rate, hours, total hours, job code, or units on the pay stub.

Fed Filing

Type the employee’s federal filing status. Type either:

M	Married
S	Single

The system stores the value you type in this field in the employee’s payroll data record. You can override the value on the employee payroll data record by specifying a filing status on the employee’s ***FWT**, ***S** or the ***L** deduction records.

State Filing

Type a value that represents the employee’s state filing status for W-2 processing purposes.

The system uses the value you type in this field as the default claiming status on the employee’s state income tax deduction authorization record (***S--**). You can override this default by typing a different filing status in the *Claiming Status* field on the employee’s ***S** deduction authorization record.

The following values are valid selections for all states. Type either:

M	Married
S	Single

If you leave this field blank, the system uses the value you type on the employee’s ***S** deduction control record during state tax calculations.

Infinium PY has many other valid state-specific entries for this field. Since Infinium frequently updates these values, check the *Infinium PY Guide to Federal and State Reporting* or the Help text associated with *Claiming Status* field on the employee state income tax deduction authorization record(s) for the most current values.

Fed Exemptions

Type the number of federal exemptions this employee claims. If you do not make an entry in this field, the system defaults to **0**.

You can make changes to this exemption status through the *Update Payroll Data (USA)* option.

Add Fed W/H

You can use this field to withhold an additional dollar amount for federal taxes at an employee's request.

Type the additional dollar amount to be withheld per pay period. The system displays the additional amount withheld on the employee's ***FWT** deduction authorization record.

State Exemptions

Type the number of state exemptions for this employee.

The system uses the value you type in this field as the default for the number of exemptions allowed on the employee's ***S** deduction authorization record. You can override this default by typing a different number of exemptions in the *Exemptions* field on the employee's ***S** deduction control record.

Add State W/H

You can use this field to withhold an additional amount for state taxes at an employee's request.

Type the additional dollar amount to be withheld for state taxes per pay period. The system displays the additional amount withheld on the employee's ***S** deduction authorization record.

If you type an amount in this field, an additional tax amount is added to the deduction associated with the value you type in the *Current State* field.

Local Exemptions

Type the number of local exemptions for this employee.

The system uses the value you type in this field as the default for the number of exemptions allowed on the employee's user-defined locality deduction authorization record. You can override this default by typing a different number of exemptions in the *Exemptions* field on the employee's locality deduction control record.

Add Loc W/H

Use this field to withhold an additional amount for local taxes at an employee's request.

Type the additional dollar amount to be withheld for local taxes per pay period. The system displays the additional amount withheld on the employee's ***L** deduction authorization record.

If you specify one current locality, type the additional withholding amount.

If you specify more than one locality in the current locality fields and the additional locality withholding amount applies to only one of the locality values, leave this field blank and update the individual locality deduction.

If you type an amount in this field, the additional tax amount is added to the deductions associated with the values you type in the *Current Misc Loc*, *Current County*, and *Current City* fields.

Current State

Type the two-character code that represents the state where the employee currently works and is being paid.

The value in this field represents the default state for all employee earnings calculated by Infinium PY.

Press F4 to display a list from which you can select a valid entry.

Information from this field becomes the default value for the *Current State* field on the employee's payroll data (USA) record.

Home State

Specify the home state where this employee resides. The system uses this value to determine the employee's resident or non-resident status for tax purposes and reciprocity calculations. If you leave this field blank, the system enters the value from the *Current State* field in this field.

SUTA State

Specify the SUTA state for this employee.

If you use the *Update Position Defaults* function and you specify a SUTA state value, that value is displayed here. If you leave this field blank, the system enters the value from the *Current State* field in this field.

Multi-State

Specify whether this employee is paid in more than one state during a pay period. Valid values are:

0	No, this employee is not paid in multiple states.
1	Yes, this employee is paid in multiple states.

If the employee works in more than one state during the pay period, this field works with the *Prorate Meth. Ovr.* field on the *S deduction control to determine whether to base the state taxable wages on the hours the employee worked in the state.

If you type **1** in this field and the value in the *Prorate Meth. Ovr.* field on the *S deduction control is **01**, the employee is taxed on the number of hours he or she worked in the state during the pay period. If you type **1** in this field and the value in the *Prorate Meth. Ovr.*field on the *S deduction control is **02**, the tax calculation is based on the total hours worked in all states and a percentage of the resulting tax is taken based on the number of hours worked in the state. If you type **0** in this field, the employee's state tax is always based on the full number of hours worked in all states.

Current Misc Loc

If applicable, type the value that represents the miscellaneous tax locality in which this employee pays local taxes, such as occupational taxes.

If you use the *Update Position Defaults* function and you specify a miscellaneous locality value, that value is displayed here.

You establish locality code values in the *Update Employer Codes* function by using code type **LCN**. This value is associated with locality type 4, miscellaneous.

Leave this field blank if miscellaneous local taxes do not apply.

Home Misc. Loc

If this employee is a resident of a miscellaneous locality, specify the home taxing locality for this employee. If this employee is not a resident of a miscellaneous locality, specify the locality where this employee lives. If you leave this field blank, the system enters the value from the *Current Misc Loc* field in this field.

The system uses this value to determine the employee's resident or non-resident status for tax purposes and reciprocity calculations.

Current County

If applicable, specify the code value that represents the county tax locality in which this employee pays local taxes. You establish locality code values in the *Update Employer Codes* function by using code type **LCN**. This value is associated with locality type 1, county.

If you use the *Update Position Defaults* function and you specify a county value, that value is displayed here.

Leave this field blank if local taxes do not apply.

Home County

If this employee is a resident of this county, specify the home taxing county for this employee. If this employee is not a resident of this locality, specify the value that represents the home county. If you leave this field blank, the system enters the value from the *Current County* field in this field.

The system uses this value to determine the employee's resident or non-resident status for tax purposes and reciprocity calculations.

Current City

If applicable, specify the code value that represents the city tax locality in which this employee pays local taxes. You establish locality code values in the *Update Employer Codes* function by using code type **LCN**. This value is associated with locality type 2, city.

If you use the *Update Position Defaults* function and you specify a city value, that value is displayed here.

Leave this field blank if local taxes do not apply.

Home City

If this employee is a resident of this city, specify the home city taxing locality for this employee. If this employee is not a resident of this locality, specify the home city. If you leave this field blank, the system enters the value from the *Current City* field in this field.

The system uses this value to determine the employee's resident or non-resident status for tax purposes and reciprocity calculations.

This value is used to determine resident status and rates for locality taxes.

Curr School Dist

If applicable, specify the code value that represents the school district tax locality in which this employee pays local taxes. You establish locality code values in the *Update Employer Codes* function by using code type **LCN**. This value is associated with locality type 3, school district.

Leave this field blank if local taxes do not apply.

Home School Dist

If this employee is a resident of this school district, specify the home school district taxing locality for this employee. If this employee is not a resident of this locality, specify the value that represents the employee's home school district. If you leave this field blank, the system enters the value from the *Curr School Dist* field in this field.

The system uses this value to determine the employee's resident or non-resident status for tax purposes and reciprocity calculations.

Earned Inc Credit

Use this field to indicate the employee's eligibility status for the U.S. Federal Earned Income Credit program. Note that eligible employees must have dependent children, a modified adjusted gross income of less than a specified amount depending on the number of dependent children (such as $27,413 for one dependent child in tax year 2000) and submit a completed W-5 form.

Effective January 1, 2011, the Advance Earned Income Credit (EIC) is eliminated.

Valid values for this field are:

0	EIC does not apply to this employee.
1	EIC applies only to the employee; the employee's spouse is not filing a certificate.
2	EIC applies to both the employee and the employee's spouse. Both spouses are filing an EIC certificate.
3	EIC applies if the employee is single and is filing the certificate.

MQGE Employee

Specify whether the employee has an MQGE (Medicare Qualified Government Employee) status. Valid values are:

0	The employee does not have MQGE status.
1	The employee has MQGE status.

To be included on the federal W-2 reporting file as a MQGE employee, the employee must either have **1** in this field or be authorized to a MQGE user-defined deduction with a year-to-date amount for the tax year.

Tipped Employee

Use this field to establish the employee's status for tip allocation processing.

Type one of the following values in this field:

0 This employee does not earn tipped income.

1 U.S. only: This U.S. employee receives tipped income and is to be included in tip allocation processing.

2 U.S. only: This U.S. employee receives tipped income but is not to be included in tip allocation processing.

3 Canada only: This Canadian employee receives tipped income that should be identified as such on the RL-1 tape.

If the employee is included in tip allocation processing, the type of tips (direct or indirect) must also be specified for the tips income during timesheet entry.

Nonres. Alien?

Specify whether the employee qualifies as a nonresident alien for federal withholding tax and Maine income tax calculations. The system performs special processing for nonresident aliens when calculating the federal withholding tax for deduction *FWT and, starting in 2011, the Maine state withholding tax for *SME.

Valid values are:

0 No. The employee is not a nonresident alien for federal and Maine withholding tax calculations.

1 Yes. The employee qualifies as a nonresident alien and requires special calculations for federal and Maine income tax withholding.

TEPA Start Date

Specify the date on which the employee filed the Tipped Employee Participation Agreement (TEPA) form, if applicable. Leave blank if the employee is not a tipped employee or if the employer does not participate in tip compliance.

TEPA – Curr Yr?

Specify whether the employee has an active Tipped Employee Participation Agreement (TEPA) for tip compliance processing.

Valid values are:

0 Not applicable. The employee does not have an active TEPA, is not a tipped employee, or the employer does not participate in tip compliance.

1 Yes

During cycle processing, Infinium PY generates a *TIPS income whenever you pay the employee an income whose income control has a *Create T/C *TIPS?* field value of **1** and the paid hours are associated with a job/position whose job control has a *Create T/C *TIPS?* field value of **1**.

2 Press Enter. The system displays Enter New Hire screen 4 (Contact and Miscellaneous Data).

Processing the Enter New Hire Contact and Miscellaneous Data Screen

The Enter New Hire Contact and Miscellaneous Data screen provides the two sets of fields below.

- Fields for communicating with the employee including telephone numbers, e-mail addresses and a web URL address.
- Fields for miscellaneous information such as a classification you define for reporting purposes like executive, managerial or clerical, the recruitment source such as advertising on the web, veteran, felony, alien registration and license information, and spouse and supervisor information.

1 Use the following information to complete the fields on this screen:

Entering Contact Information

Office Tel. No.

Type the employee's telephone extension or complete office telephone number including area code. The system can use this information to generate telephone directories.

Misc Phone #1, #2 and #3

Type any other telephone numbers where this employee can be reached, such as the employee's cellular phone number. Examples: 617-555-9999 for a number in Boston, Massachusetts, 011-44-204-999999 for an international number in Dorset, England.

Email Address #1 and *#2*

Type one or two e-mail addresses where this employee can be reached such as John_Smith@XXX.com.

URL Address #1

Type the URL (Uniform Resource Locator) associated with this employee, if any, such as www.XXXCorp.com.

Entering Miscellaneous Information

The miscellaneous information fields are informational only and can be used to meet your company's business and reporting needs.

Class

You can use this field to classify employees for reporting purposes. For example, you can use this field to classify employees into categories such as clerical, managerial or executive. You use Infinium QY to develop reports using this field.

You define code values for this field using code type **CLA.**

Hire Source

Specify the recruitment source for this employee. You define code values for this field using code type **HIR**.

There can be a default value from the employee's applicant data.

Security Group

You can use this field to restrict user access to this employee's records in the system. To use this feature you must:

- Establish security group code values for the code type **SEC** through the *Update Employer Codes* function.
- Use this screen or screen 3 of the employee's basic data record to enter the code for the security group to which you assign the employee. A default security group code can come from the job control to which the employee is assigned.
- To prevent users from accessing records of employees in this security group, specify the group restriction in the users' profiles through the *Update User Security Controls* function. For details, refer to the *Infinium HR Guide to Management Functions.*

Office Tel No

You can use this field to type the employee's office telephone number, extension or both full telephone number and extension.

You can generate an office phone directory based on information from this field using the Infinium HR *Administrative Reporting / Miscellaneous Reporting / Internal Telephone Directory* [ITD] function. For additional information, refer to the *Infinium HR Guide to Processing*.

Veteran's

Type the code value that represents the employee's military status. You establish code values for the code type **MIL** through the *Update Employer Codes* option. The system uses this information when you run the Employee Veteran Report on Infinium HR.

Handicap

Type the code value that identifies the employee's handicap status. You create the code values for this code type through the *Update Employer Codes* option using code type **HDC**.

Ex - Felon

You can use this field to record an employee's criminal conviction information. Type either:

0	No, this employee is not a convicted felon.
1	Yes, this employee is a convicted felon.

Alien Reg No

If this employee is a legal alien, type the employee's alien registration number in this field.

License

You can use this field to specify a code value that represents a license held by this employee. You create code values using code type **LTP** in the *Update Employer Codes* function.

For example, health industry employers can track licensing data for registered nurses, doctors, pharmacists and so on. Transportation companies can maintain driver's license information for employees.

The license code that you type in this field defaults into the *License Code* field in the Infinium HR *Update Employee License Data* function. You can use this function to enter additional related information, such as the issue date and expiration date of the license, the license number, license status, licensing authority and cost.

This field can contain a default from the *License Code Req* field on the job control for the job to which the employee is assigned.

License Expires

You can use this field to record the expiration date of the license you typed in the *License* field.

The license expiration date you type in this field is the default for the *Expiration* field in the *Update Employee License Data* function.

Spouse Name

If the employee is married, type the name of the employee's spouse.

Leave this field blank if the employee is not married.

Sup. Employer

Specify the employer of the employee's supervisor.

Sup. Name

Press F4 to display a list of valid supervisor names.

2 Press Enter. The system displays the Update PTO Accruals screen for processing paid time off (PTO) information.

Processing the Employee's PTO Accruals

On the Update PTO Accruals screen and other screens that you can access from the Update PTO Accruals screen, you can authorize the employee's participation in one or more paid time off accrual plans.

Setup Required

Defining paid time off accrual information for a new employee requires the following prior setup for the employer:

- Definition of paid time off accrual categories such as Vacation, Sick Time and STD (short term disability) in the employer controls. You can define up to six categories for each employer.
- Definition of individual paid time off benefit plan codes in *Update Employer Codes* using code type **ACR**. For example, you can define **VACS** as the code for a vacation plan that applies to salaried employees and **VACH** as the code for the plan for hourly employees.

- Definition of each plan's rules through *Update Accrual Controls*. For example you can specify whether to track hours or dollar amounts or both under this plan, and the rate at which these are accrued. These controls also specify whether you are tracking the history of paid time off accrual transactions for employees assigned to the plan.

Defining plans by code allows you to specify different methods of calculating paid time off hours or dollar amounts for different groupings of employees. For example, you can do the following:

- Define different vacation plan rules for employees who work in different Canadian provinces in order to meet provincial regulations
- Define different vacation plan rules for employees who are or are not represented by a specific union

Pay Period Accrual Processing

Once you have assigned the employee to paid time off accrual plans in *Enter New Hire*, the system uses the information when you run *Calculate Benefit Accruals* after each pay period. The system credits the employee with the appropriate number of accrued and earned paid time off hours and/or dollars and reduces the employee's earned hours and/or dollars by the amount the employee took that pay period.

For more information on establishing accrual controls and maintaining accrued and earned hour and dollar amount balances for employees, refer to the *Infinium PY Guide to Management Functions*.

Processing the Update PTO Accruals Screen

On the Update PTO Accruals screen, you can authorize the employee to participate in applicable paid time off plans. This screen provides two lines of fields for each paid time off category defined for this employer, such as Vacation.

To assign an employee to a specific plan, specify the plan's code next to the applicable category such as **VACS** next to the Vacation category.

The column headings apply to the two lines per category. For example, the *Hours/Amount Earned* column provides a field for accrued hours on the first line and a field for accrued dollar amounts on the second line.

When you first assign the employee to a plan during *Enter New Hire*, you can also specify the eligibility date and, if applicable, any hours and/or dollar amounts that the new employee is receiving effective with the date of hire.

Once you have specified a plan and its initial information, you can edit the information directly on this screen only if the plan's accrual controls indicate that you are not tracking accrual transaction history for this plan. If you are tracking history you must access the PTO accrual history screens as indicated later in this procedure.

Do not press Enter until you are done with this employee's PTO accrual information. When you press Enter at this screen, the system exits PTO accrual information and continues to User Defined Data screens.

Update PTO Accruals Screen Fields

1 Use the following information to complete the fields on this screen. Ordinarily, only the *Code*, *Elig Date* and under some circumstances the *Ovr %* field apply during entry of a new employee.

If the system does not allow you to access the fields for a plan at this screen after you have typed information, continue to the next step to access the history and transaction screens for that plan.

Accr Type

In the *Accr Type* column, the system displays each accrual category specified in this employer's controls.

Hours Earned, Accrued, Taken and Remaining

These hour fields are on the first line of information for each plan. They do not ordinarily apply during entry of a new employee.

The system updates the *Hours Earned* and *Hours Accrued* fields each time you run *Calculate Benefit Accruals*.

The value in the *Hours Accrued* field represents paid time off hours an employee has earned but cannot yet take. The value in the *Hours Earned* field represents paid time off hours an employee has earned and can take at any time.

The system updates the *Hours Taken* field when you post a payroll cycle or an on-demand check. It represents the earned hours an employee has taken during the current accrual period.

The system automatically calculates and displays the *Hours Remaining* value by subtracting the value in the *Hours Taken* field from the value in the *Hours Earned* field.

Elig Date

Type the earliest date on which the employee is eligible to use this accrual type. When you run the *Prove Timesheet Data* function, the system compares this date to the pay period ending date of the cycle. It generates a warning message if you enter hours of a designated paid time off income for an employee whose eligible date is after the pay period ending date.

Ovr %

If you are accruing dollar amounts under this plan but a different percentage applies to this employee than the percent specified in the accrual plan controls, specify the override percentage here. The system uses this percentage rather than the percentage from the controls during *Calculate Benefit Accruals*.

To use the value from the accrual controls or if you are accruing only hours under this plan for this employee, leave this field blank.

Amount Earned, Accrued, Taken and Remaining

These values are on the second line for each category and do not ordinarily apply during entry of a new employee.

The meaning and uses of these values are similar to those for the hours but are measured in dollar amounts rather than hours.

2 Under some circumstances, the system does not allow you to return to the fields for a plan that tracks accrual transaction history even during this initial session at this screen. For example, this happens if you have selected the plan with **5** to view the transactions created when you added this plan.

   If this occurs when you need to make a change to the information before continuing the *Enter New Hire* procedure, you must create a new transaction to modify the information before leaving this screen.

   To create a new transaction modifying the information, type **5** in *Opt* next to the category and press Enter. The system displays the Update PTO Accrual History screen.

Update PTO Accrual History Screen

1 On the Update PTO Accrual History screen, you can view the existing transactions for this employee under this plan and you can take either of the following actions:

   - Type **5** next to a listed transaction and press Enter to view the transaction details on the Display PTO Accrual History screen. Press Enter to return to the Update PTO Accrual History screen.
   - Press F6 to display the Create PTO Accrual History screen and enter a transaction.

For information about these screens' fields, press Help or refer to the "Processing Paid Time Off Accruals" chapter of the *Infinium PY Guide to Management Functions*.

When done with accrual history, press F3 at the Update PTO Accrual History screen to return to the Update PTO Accruals screen.

2 When done with paid time off accruals, press Enter at the Update PTO Accruals screen. The system displays Employee User Data screen 1.

Processing Enter New Hire User-Defined Data

The three employee user-defined data screens allow you to track information that is specific to your organization and not otherwise tracked in Infinium HR/PY. You must already have done the following:

- Defined descriptions for your user-defined fields in the Infinium HR or Infinium PY *Update User Defined Titles* function
- Defined code values for the code fields in the *Update Employer Codes* function using code types UC1 through UC9 and UCX

For details on defining the field titles and the code values, refer to the *Infinium HR* or *Infinium PY Guide to Controls*.

You can also later enter and update an employee's user-defined information through the *Update User Defined Data* function.

Employee User Data Screen 1

1 Use the following information to complete the fields on the first Employee User Data screen:

The system displays three types of user-defined data fields on this screen: code fields, amount fields and date fields. The field descriptions are as you defined them in your system.

Code Description, Value

You can type a code value in up to 10 user-defined code fields. Press F4 to display the name of the code type used for each field and the valid values that have been established for each code type.

Amount Description, Amount

You can type numeric information in up to 10 user-defined numeric fields. The system allows a value of up to 9,999,999.99 per field.

Date Description, Date

You can type a date in up to 10 user-defined date fields.

2 Press Enter. The system displays Enter New Hire User Data screen 2.

Enter New Hire User Data Screen 2

3 Use the following information to complete the fields on this screen:

The screen displays two categories of user-defined fields: hours and free-form characters.

Hours Description, Hours

You can type hours information into up to 10 user-defined hours fields. The system allows a value of up to 99,999,99 per field.

Description, Characters

You can type alpha-numeric information in up to 20 user-defined character fields. Each character field is 20 characters in length.

4 Press Enter. The system displays Employee User Data screen 3.

Enter New Hire User Data Screen 3

5 Use the following information to complete the fields on this screen:

The system displays two categories of user-defined fields on this screen: numeric and free-form comment.

Numeric Description, Value

You can type numeric information in up to 10 user-defined numeric fields. The system allows a value of up to 99,999,999,999 per field.

Description

You can use this large comment field to type miscellaneous information for the new employee. This is a 100-character free-form field that accepts alpha-numeric text.

6 Press Enter. The system displays the Update Employee Income Codes screen.

Processing the Employee’s Income Authorizations

On the Update Employee Income Codes screen, you can select and provide information for the incomes this employee is authorized to receive. If you specified a payroll authorization group for this employee on Enter New Hire screen 3, the system automatically displays the incomes associated with that group at the bottom of this screen.

If you do not need to authorize the employee to any additional income, make changes to the employee’s existing income authorizations, or delete the employee’s existing incomes, continue to “Processing the Employee’s Deduction Authorizations.”

1 Use the following information to authorize incomes for this employee at this Update Employee Income Codes screen:

Authorizing an Income for This Employee

Income Code

Specify the income that you want to assign to this employee. Press F4 to display a selection list of valid income codes.

2 Press Enter. The system displays fields for entering income authorization details in the middle of this screen. The fields may vary depending on the income you specified.

3 To provide details for this authorization, do the following:

- Type or select the cycle during which this employee can receive this income. You can enter the generic cycle name ***AUTO** if the system should auto-generate this income for the employee during any normal pay cycle to which this employee is assigned.
- Type any additional individual employee information for this income. Any information you type overrides information in the corresponding field in the income control record.

  For example, if you enter **2000** in the *YTD Limit* field on the income control, but specify **2400** in the *YTD Limit* field on this employee’s income authorization record, the system uses the higher employee value when it processes the employee’s paycheck.

  For additional information on creating income controls, refer to the *Infinium PY Guide to Controls*.
- If you specify a rate or amount, you must specify basis value **I**.
- If you use Infinium Employee Self Service Time Entry, you can authorize employees to enter their own timesheet data for this income.

To override the value in the *Self Service Time Entry* field on Update Income Controls screen 2 of 3, type one of the following in the *Self Service Time Entry* field:

1 Yes, allow this employee access to this income through Infinium Self Service Time Entry.

0 No, deny this employee access to this income through Infinium Self Service Time Entry.

If you leave this field blank, the system uses the value in the income control record.

4 Press Enter to save the information. The system adds the income code and summary details to the list at the bottom of this screen.

Changing an Existing Income Authorization

To change an existing income authorization listed at the bottom of this screen, type **2** in the *Opt* field next to that income and press Enter. The system displays information for that authorization in the middle of the screen.

Make the changes and press Enter again to return the updated authorization to the list on the bottom of the screen.

The system repositions your cursor to the *Income Code* field from which you can add, change or delete other income authorizations.

Deleting an Existing Income Authorization

To delete any listed income authorization, type **4** in the *Opt* field next to the appropriate income and press Enter. The system replaces the income authorization record in the list with **DELTD**. It removes the record completely when you press F3 to exit this screen.

Continuing to the Deduction Authorization Procedure

5 When done with income authorizations at the Update Employee Income Codes main screen, press F3. The system displays the Update Employee Deduction Codes screen.

Processing the Employee's Deduction Authorizations

On the Update Employee Deduction Codes screen, you can select and provide information for deductions that are authorized for this employee.

If you specified a payroll authorization group for this employee on the Enter New Hire Payroll Information screen, the system automatically displays that group's deductions at the bottom of this screen.

If you do not need to authorize the employee to any additional deductions, make changes to the employee's existing deduction authorizations or delete the employee's existing deductions, continue to "Processing the Employee's Benefit Enrollments."

Authorizing a Deduction for This Employee

1 Use the following information to authorize a deduction for this employee:

Deduction

Specify the deduction that you want to assign to this employee. Press F4 to display a selection list of valid deduction codes.

2 Press Enter. The system displays Update Employee Deduction Codes detail screen 1.

Update Employee Deduction Code Details Screen 1

On the Update Employee Deduction Code details screen 1, you can type information into any of the fields for this employee. The fields can vary depending on the type of deduction.

When you enter information into a field on this screen or the next details screen, it overrides information in the corresponding field on the deduction control record. For example, if you enter **50.00** in the *Deduction Amount* field on the deduction control, but specify an employee deduction amount of **25.00** here in this employee's deduction authorization record, the system uses the lower employee value when it processes the employee's paycheck.

For additional information on creating deduction controls, refer to the *Infinium PY Guide to Controls*.

If you specify a rate or amount, you must specify basis value **I.**

3 Press Enter. The system displays the second Update Employee Deduction Code details screen

Update Employee Deduction Codes Details Screen 2

The second Update Employee Deduction Code details screen includes fields for the employer general ledger accounts. If you select a non-tax deduction, the system displays additional fields.

You can use these fields to specify the basis used to calculate the employer's contribution to employee's benefit plans.

For example, you want the employer contribution to a 401(K) plan to be a percent of the employee's taxable income up to $150,000 per year. Because you type **1** in the *Use *FWT for Income* field, **150000** in the *Income Limit Amount* field and **3** in the *Income Limit* type field, the system calculates the employer's contribution to the employee's 401(k) plan on up to $150,000 of the employee's annual income.

You can enter information in some or all of the fields, or leave all of them blank. You can also enter this information on the deduction control record so that it applies to all employees authorized to this deduction. See the *Infinium PY Guide to Controls* for details.

4 Press Enter to save the deduction information you entered.

Initial Update Employee Deduction Codes Screen

The system returns you to the initial Update Employee Deduction Codes screen and adds this deduction to the list of this employee's deduction authorizations.

Changing an Existing Deduction Authorization

To change any existing deduction authorization listed at the bottom of this screen, type **2** in the *Opt* field next to that deduction and press Enter. The system displays the two deduction details screens for you to make the changes as for a new deduction. Make the changes and press Enter at each screen.

When you press Enter at the second details screen, the system returns you to the initial screen and displays the updated authorization summary in the list on the bottom of the screen.

The system repositions your cursor to the *Deduction* field from which you can add, change, or delete other deduction authorizations.

Deleting an Existing Deduction Authorization

To delete any listed deduction authorization, type **4** in the *Opt* field next to the appropriate deduction and press Enter. The system replaces the authorization record in the list with **DELTD**. It removes the record completely when you press F3 to exit this screen.

Continuing to the Employee Benefit Enrollments Procedure

When done with deduction authorizations at the Update Employee Deduction Codes main screen, press F3. The system displays the Select Benefit Plan Year screen.

Processing the Employee's Benefit Enrollments

Refer to the *Infinium HR Guide to Setup and Processing for Benefits Administration* for detailed information on establishing employee benefit plans and enrolling employees in plans.

Use the following information to specify benefit enrollment information for this employee:

Select Benefit Plan Year Screen

1. If you use plan year processing, specify the plan year to use for the employee's benefit plan enrollments.

   If your employer is set up to use plan year processing, the system uses a default *Plan Year* field value from the *Update Benefit Controls* function. Verify with your benefits administrator what plan year to use for new hires before you change the default value.

   If you do not use plan year processing, leave blank.

2. Press Enter. The system displays the Update Employee Benefit Enrollments screen.

Update Employee Benefit Enrollments Screen

On the Update Employee Benefit Enrollments screen, you can specify the benefits in which this employee is enrolling.

If you assigned a personnel benefit group to this employee on Enter New Hire screen 2, the system displays a list of benefits for which the employee is eligible.

3. Type **5** in the *Opt* field next to each benefit plan selected by the employee.

4. Press Enter. The system displays a screen for each benefit plan you select for this employee, unless the benefits administrator has defined a plan as an auto entry plan.

Continue to press Enter to proceed through the selected benefit plan screens. The system creates a pending enrollment record in each plan for the employee.

The employee is not actually enrolled in the plans until the Benefits Administrator runs the *Mass Update Employee Enrollments* function. The system authorizes the employee to deductions associated with the employee's benefit plans when you process the begin step of pay cycle processing.

5 To work with beneficiary and dependent information for this employee, press F5 to access the Update Dependents/Beneficiaries screen.

Update Dependents /Beneficiaries Screen

Provide the applicable information and press F3. The system displays the Employee Topic List selection screen.

Employee Topic List Selection Screen

On the Employee Topic List selection screen you can do the following:

- Update employee information by typing **2** in the *Opt* fields next to the topic to update.
- Display employee information by typing **5** in the *Opt* fields next to the topic to display.
- Refresh the default values in the *Opt* field by pressing F5.
- Save the values you entered into the *Opt* fields by pressing F16.
- Clear the default values displayed in the *Opt* fields by pressing F17.

6 Type **2** next to the topic to update.

7 Press Enter. The system displays the screen for the topic you selected.

8 Update the topic and press Enter. The system displays the next topic you selected. When you complete updating the selected topics and press Enter, the system returns to the Employee Topic List selection screen.

9 Press F3 to return to the Enter New Hire prompt screen from which you can hire additional employees.

Initial Enter New Hire Prompt Screen

When returned to the initial Enter New Hire prompt screen, you can repeat the preceding procedures to enter information for another new employee.

You cannot use the *Enter New Hire* function to change information you have already entered for an employee.

Refer to the “Updating Employee Data” chapter of the *Infinium HR* or *Infinium PY Guide to Processing* for information on how to make changes to information for current employees.

Exiting the *Enter New Hire* Function

When done entering new employees, press F3 at the initial employee prompt screen to exit to the menu.

Verify New Employee Information

To verify key information about new employees hired during a specified time period, you can use the following Infinium HR functions:

- *Employee Data / List Employee Data / List PE Actions*
- Employee Data / List Employee Data / List PE Action Details

Notes

Chapter 6 Hiring New Employees into Canadian Employers

6

This chapter describes using *Enter New Hire* for new employees you pay in Canada.

The chapter consists of the following topics:

Overview of the Hiring New Employees into Canadian Employers Process

In this chapter you learn to use *Enter New Hire* to hire employees you pay in Canada. This chapter presents information on all of the *Enter New Hire* function screens. Depending on your security restrictions, you may not have access to all of these screens.

Enter New Hire is included in both Infinium HR and Infinium PY. You obtain identical results regardless of which system you use to hire employees. *Enter New Hire* automatically creates records for the new employee on both Infinium HR and Infinium PY.

Objectives

When you complete this chapter you should be able to use *Enter New Hire* to establish information for new employees.

Entering New Hires

The *Enter New Hire* Screens

If you have access to all of the *Enter New Hire* screens, the system identifies them and presents them in the order shown below. The prompt screen for the *Enter New Hire* function is not included in this list.

The displayed page number in this table changes if you are restricted from accessing one or more of these screens. For example, if you are not allowed to access the Payroll Information screen, the Contact and Miscellaneous Information screen displays “3 of 7” rather than “4 of 8” since this is now the third of the seven you can access.

Enter New Hire Screens

Order	Description	Displayed page number
1	Enter New Hire	1 of 8
2	Enter New Hire (with access to additional I-9 and foreign national data screens)	2 of 8
3	Payroll Information	3 of 8
4	Contact and Miscellaneous Information	4 of 8
5	Paid Time Off Information (with access to additional PTO screens)	5 of 8
6	Employee User Data	1 of 3
7	Employee User Data	2 of 3
8	Employee User Data	3 of 3
9	Update Employee Income Codes	none
10	Update Employee Deduction Codes (with access to authorization details screens)	none

Enter New Hire Screens

Order	Description	Displayed page number
11	Update Employee Benefit Enrollments (with access to enrollment details screens)	None
12	Employee Topic List	None

Choosing Whether to Re-Use Applicant Information during Hiring

During use of *Enter New Hire*, you can choose to bring existing applicant information into the *Enter New Hire* basic data fields. This is information previously entered through the Infinium HR *Update Applicant Data* function.

Advantages

Using the existing applicant information during *Enter New Hire* expedites the hiring process regardless of whether you use *Enter New Hire* in Infinium HR or Infinium PY.

The information you can bring in from the applicant record includes such items as the applicant's address, home telephone number and applied-for position. You can update any incomplete or outdated information in *Enter New Hire*.

Method

Specify the applicant in the *Applicant Name* field at the *Enter New Hire* prompt screen. You can type the name or you can press F4 to display a selection list of applicants.

If you select an applicant from the prompt list, the system displays key information from the applicant record on the prompt screen so that you can verify that you selected the correct applicant before you continue.

Automatic Update to Applicant Record

If you use applicant data and complete the *Enter New Hire* procedure, the system automatically updates the applicant's record to indicate that the applicant has been hired. The applicant record remains in Infinium HR so that you can do analysis and generate reports for applicant data.

Entering a New Hire

Accessing the *Enter New Hire* Function

Perform the following steps to access the *Enter New Hire* function:

1 From the Infinium HR or Infinium PY main menu select *Employee Data.*

2 Select *Update Employee Data*.

3 In Infinium HR, select *Enter New Hires* [HIRE]. In Infinium PY select *Enter New Hire* [ENH].

The system displays the Enter New Hire prompt screen.

Processing the Enter New Hire Prompt Screen

The Enter New Hire prompt screen provides fields for specifying the employer, employee number, and, if you are re-using data from the applicant record, the applicant being hired.

1 Use the following information to complete the fields on this screen:

The *Employer* field is the only field that you must complete.

Employer

Specify the employer for which the new employee will work.

Employee

Use one of the following methods to assign an employee number:

- Leave the *Employee* field blank to allow the system to automatically assign the employee number based on the value in the *Next Employee #* field on the entity control record.
- Type the employee’s tax identification number in the *Employee* field. The system copies this number to the *Tax ID #* field on *Enter New Hire* Screen 1.
- Type a user-defined number in the *Employee* field.

For additional information on selecting a method of assigning employee numbers, refer to the “Setting up Entity and Employer Controls” chapter of the *Infinium HR Guide to Controls* or the “Setting up the Entity Control” chapter of the *Infinium PY Guide to Controls*.

Applicant Name

If you track applicant information in Infinium HR, you can specify an applicant in this field to default information from the applicant data record into the new employee record.

Do one of the following:

- If not using default information from an applicant record, leave this field blank and press Enter to continue directly to Enter New Hire screen 1 (Basic Personal Data).
- Type the applicant's name and press Enter to continue directly to Enter New Hire screen 1 (Basic Personal Data). The system supplies default information on Enter New Hire screen 1 (Basic Personal Data).
- To view applicant information before specifying an applicant and verifying the selection at this prompt screen, press F4 and continue to the next step.

Selecting an Applicant from the Applicant List

2 Use the following information to work with the list of applicants:

Locate

If you do not see the new employee's applicant record on the first Applicants screen, you can press PageDown to scroll through the list of applicants. To expedite locating the applicant record, type some or the entire last name in the *Locate* field at the top of the screen and then press Enter. The system locates the specified applicant's record and displays it on a separate Applicants screen.

Opt

Type any character in this field to select the applicant.

Local ID

Use this field only when processing for localized situations, for example, Macau. See the *Guide to Localized Setup and Processing* for more information.

Or Passport

Use this field only when processing for localized situations, for example, Macau. See the *Guide to Localized Setup and Processing* for more information.

3 Press Enter to return to the Enter New Hire prompt screen.

Verifying the Applicant at the Prompt Screen

4 The bottom portion of the screen displays any of the following information that is available from the applicant record: last name, social security or social insurance number and address. Use the following information to work with this screen:

Verify that you selected the correct applicant. You cannot make changes to this information on the Enter New Hire prompt screen, but you can update the information on the screen that follows.

5 Press Enter. The system displays Enter New Hire screen 1 (Basic Personal Data).

Processing Enter New Hire Screen 1 (Basic Personal Data)

Enter New Hire screen 1 provides fields for basic personal data such as tax ID, name, address, gender, birth date, marital status and emergency contact information, as well as the employment position and date hired.

If you specified an applicant at the prompt screen, Enter New Hire screen 1 (Basic Personal Data) supplies any default information that is present in the applicant's record. There may be few or many defaults since most applicant data is optional. If the applicant applied for more than one position, the system supplies the position that the applicant specified as a first preference.

The only fields that cannot automatically display default values from the applicant record are *Common Name*, *Date of Hire*, *Marital Status* and the fields found in the Emergency Information section of the screen.

Required Information

The following information is required at this screen: tax ID, hire position, date of hire, last name, first name, address, city/town, state/province, date of birth, sex and marital status.

Field Information

1 Use the following information to complete the fields on this screen:

Tax I.D. #

If you are using the tax identification number as the employee number, this field displays the number you typed in the *Employee* field on the Enter New Hire prompt screen.

Specify the employee's tax identification number (Social Security Number in the U.S., Social Insurance Number in Canada) with or without hyphens. If you do not type the hyphens, the system later supplies the hyphens based on the value you enter in the *Payroll Country* field when you press Enter to exit this screen.

Hire Position

Type the code that represents the position into which you are hiring the employee. Press F4 to display a list of potential positions along with their authorized staffing level, current staffing level and openings.

Date of Hire

Type the date of hire of this employee.

Last Name

Type the employee's last name. This is an 18-character field.

Unless you type information in the *Check Name* field on the Enter New Hire Payroll Information screen, the system uses the *Last Name, First Name* and *Middle Name* fields for payroll processing, including check printing and generation of year-end tax slips such as the T4 and RL-1.

Suffix

Type the employee's suffix, such as JR, SR, II, III and so on.

First Name

Type the employee's first name. This is an 18-character field.

Middle Initial

Type the employee's middle initial. This is a 1-character field.

Birth Name

Type the employee's maiden name or name given at birth, if it is different from the employee's current name. This is an 18-character field.

Common Name

You can use this field to type the employee's preferred name or nickname if it is different from the employee's first name. This is a 20-character field. You can use this field to locate the employee after he or she is hired.

If you leave this field blank, the system defaults the employee's first name into this field when you press Enter to exit from this screen.

Middle Name

Type the employee's middle name, if applicable.

Address

Type the first line of the employee's street address. This is a 30-character field.

Unless you type information in the *Check Address* fields on the Enter New Hire Payroll Information screen, the system uses the *Address, (Line 2), City/Town, State/Province* and *Postal Code* fields for payroll processing, including check printing and generation of year-end tax forms and slips such as the W-2, 1099R, T4 and RL-1.

(Line 2)

If necessary, type the second line of the employee's street address.

City/Town

Type the name of the city or town in which the employee resides.

State/Province

Specify the state or province in which the employee resides. You define code values for this field using code type **STA**.

If you defined default *State/Province* values in your Infinium HR employer or level controls, the system supplies the default here.

Postal Code

Type the employee's postal or ZIP code. This is a 10-character free-form field. For U.S. addresses you can use the five-digit zip code followed by a hyphen plus four more digits. For Canadian addresses, use three characters followed by a space and three more characters.

Use the *Reqr Postal Code?* field in the *Update Employer Controls* function to require users to enter a postal code when using the new hire process, updating basic data, or working with Personal Change transactions in the *Enter Personnel Actions* function.

Country

Specify the country where the employee lives. You define country codes through *Update Employer Codes*, using code type **CTR**.

If you leave this field blank, the system assumes the employee's residence country is **USA**.

If you defined a default country value in your Infinium HR employer or level controls, the system supplies the default here.

County

Type the code that represents the county in which the employee lives. You establish code values for counties through the *Update Employer Codes* option, using code type **CNT**.

For Canadian addresses, you can use a **CNT** code value in this field to represent the Census Metropolitan Area for Canadian Employment Equity Act reporting in Infinium HR. For information on setting up code values for EEA statutory reporting, see instructions for setting up employer codes in the *Infinium HR Guide to Controls* or the *Infinium PY Guide to Controls*.

Payroll Country

Type the code that represents the country in which the employee works and to which you report the employee's wages. You establish code values for countries through the *Update Employer Codes* option, using code type **CTR**.

Valid values for payroll processing are:

USA	United States
CAN	Canada

If you leave this field blank, the system assumes the employee's payroll country is **USA**.

If you establish a default value for the *Country* field when you set up your employer control or level control records on Infinium PY, that value becomes the default in this field for new hires.

Home Tel No

Type the employee's home telephone number. This is a 19-character free-form field. The system does not edit this field for format or area code. You can include the area code or other international codes; if you do, you can use any character (such as parentheses or dashes) to separate the codes from the rest of the telephone number.

For example, you can type **508-555-1212** or **(508) 555-1212** for U.S. and Canadian telephone numbers. For international numbers you can type the number using the appropriate format for each country such as **011-44-333-444555** for telephone numbers in the United Kingdom.

Infinium HR and Infinium PY users that use the *Enter New Hire* function should agree on a consistent format for this field in order to ensure compatible data for displays and reports.

Date of Birth

Type the employee's date of birth using the appropriate date format for this employer.

You specify the date format for your employer when you create the employer control. Refer to the *Infinium HR* or *Infinium PY Guide to Controls* for additional information.

Sex

Type either:

M	Male
F	Female

Marital Status

Type the employee's actual marital status. This is an informational field only. The system does not use this field for tax calculations.

Type one of the following values:

M	Married
S	Single
D	Divorced
W	Widowed
P	Separated
O	Other

Emergency Information

Type the name, address and telephone number of an emergency contact for this employee.

You can maintain the emergency contact information you enter here through the *Update Emergency Contact* function. This contact is the primary emergency contact.

All fields, with the exception of the *Relationship* field, are free-form and do not require special values. If you type a contact name, type a relationship code value in the *Relationship* field. If you type a contact name and choose to leave the *Relationship* field blank, press F21, or click Override from Actions on the Web, to continue with the new hire transaction.

You create code values for use in the *Relationship* field through the *Update Employer Codes* option using code type **REL**.

2 Press Enter. The system displays Enter New Hire screen 2 (Employment Data).

Processing Localized Payroll Information

You can enter localized payroll information when you enter a new hire. To process localized payroll information you press F19 on the first Enter New Hire screen to display the Update Macau Name and Address screen.

For information about using the Update Macau Name and Address screen, see the *Guide to Localized Setup and Processing*.

Processing Enter New Hire Screen 2 (Employment Data)

Enter New Hire Screen 2 provides fields for employment data such as status (full or part time and so forth), base salary rate, frequency and number of hours to be worked, job and payroll rates for multiple jobs such as teaching at one rate and coaching athletics at a different rate and performance review scheduling.

1 Use the following information to complete the fields on this screen:

The system supplies any of the following default information that is available in the applicable position controls:

- Position
- Levels
- Shift code
- PE benefit group
- Job code

The system supplies any of the following default information that is available in the applicable job controls:

- Personnel base rate
- Payroll rate or rates

- Pay grade
- Step-in-Grade step, next step and next step date

  This screen displays fields for this information only if this position is associated with step-in-grade processing

- Next review type and next review date

Use the following field information to type new information or override default information on this screen, as necessary:

Status

Type the employee's active employment status code. You must establish status values through the *Update Employer Codes* option, using code type **STS**.

Personnel Rate

Type the base rate that your Personnel department uses for this employee. This field can contain hourly, monthly, annual or several other types of rates.

If the rate is outside the salary range for this job, the system displays a warning message when you try to exit this screen. You can either correct the rate or press F21 to override the warning.

The rate must be compatible with the value in the *Base Frequency* field. For example if you type a monthly salary amount in this field, you must type **M** (monthly) in the *Base Frequency* field.

Infinium PY does not calculate pay based on the information in this field; however, Infinium HR uses this rate in personnel reports and to calculate the employee's annualized base rate.

If you use Infinium HR benefits administration and your employer calculates life insurance based on a multiple of base rate, the system uses the personnel base rate in this field to calculate life insurance coverage when you enroll the employee in a life insurance plan. The system can use other fields to compute life insurance coverage including the *Base Frequency*, *Scheduled Pay Pds* and *Regular Hours* fields.

Scheduled Pay Pds

Type the number of pay periods scheduled during the calendar year for this employee. If you do not state the employee's personnel rate on an annual basis, the system uses the value you enter in this field in conjunction with the value you enter in the *Regular Hours* field to annualize the employee's personnel rate.

If your employer calculates life insurance based on a multiple of base rate, the system includes this value in the calculation of coverage as indicated in the description of the *Personnel Rate* field.

Information from the *Scheduled Pay Pds* field is also included in various Infinium HR reports.

Base Frequency

Specify a frequency for the rate you typed in the *Personnel Rate* field.

Valid frequencies are:

H	Hourly
D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
A	Annually
10	10 pay periods per year
13	13 pay periods per year
22	22 pay periods per year
27	27 pay periods per year
53	53 pay periods per year

If your employer calculates life insurance based on a multiple of base rate, the system includes this value in the calculation of coverage as indicated in the description of the *Personnel Rate* field.

The system also includes the *Base Frequency* field in various Infinium HR reports.

Regular Hours

Type the number of regular hours per pay period that this employee is expected to work. The value you type in this field must be compatible with the amount you type in the *Scheduled Pay Pds* field. For example, if you type **40** regular hours in this field, you would probably type **52** in the *Scheduled Pay Pd* field. The system can use information in this field to generate auto pay entries for the employee during cycle processing, or you can establish auto pay groups to generate time entry records.

If your employer calculates life insurance based on a multiple of base rate, the system includes this value in the calculation of coverage as indicated in the description of the *Personnel Rate* field.

Information from the *Regular Hours* field also displays in various personnel specific reports.

Ethnic ID

Type the one-character ethnic identification code. You must establish ethnic code values in the *Update Employer Codes* option using code type **ETH**.

Shift Code

If this employee's position is associated with a particular shift, type the appropriate shift code in this field. You define values for this field using code type **SFT**.

If you specified a shift code on the position control record to which this employee is assigned, the system uses that value as the default for this field.

Step-in-Grade Fields

If this employee's position is not associated with step-in-grade processing, the system displays only the *Pay Grade* field. If the position is associated with step-in-grade processing, the system also displays the *Step*, *Next Step* and *Next Step Date* fields.

The default information is from the pay grade you assign to the job control linked to the position. The default personnel rate and payroll rates are from the pay grade table.

You can use the following information to modify the step-in-grade controls for this employee, as necessary:

Pay Grade

You cannot override a default value in this field if using step-in-grade processing for this employee.

If using the pay grade for other purposes, type the grade to which the employee is assigned.

Step

Type a new step in this field to assign this employee to a starting step other than the default specified on the job control record.

Next Step

You can override the default.

The employee advances to this next step after meeting criteria that you set up in the *Update Pay Grade and Steps* function. You execute the *Mass Update Employee Steps* function to advance the employee to the next step.

Whether you override this value or not, the system sets the value in the *Step Override?* field on screen four of the employee's basic data record to **0** to apply hours-worked requirements specified on the pay grade control, if applicable.

Next Step Date

You can override the default value from the *Update Pay Grade and Steps* function. This is the date that the employee is scheduled to advance to the pay grade step specified in the *Next Step* field.

Leave this field blank if progression to the next step is based on hours worked and not on length of service.

The system uses criteria from the step to which the new employee is assigned to determine the next step date. When you execute the *Mass Update Employee Steps* function on or after the next step date, the system advances the employee to the next step provided the employee meets hours-worked requirements specified on the pay grade control.

Whether you override this value or not, the system sets the value in the *Step Override?* field on screen four of the employee's basic data record to **0** to apply hours-worked requirements specified on the pay grade control, if applicable.

Next Review

This code represents the type of performance review the new employee will receive. You can override the default. You establish code values for this field through the *Update Employer Codes* option using code type **RTP**.

If you type a value in this field, you must also enter a value in the *Next Review Date* field.

You can maintain this information through the *Enter Personnel Actions* option in Infinium HR.

Next Review Date

To override the default date for the employee's next performance appraisal, type a different date in this field.

If you type a date in this field, you must type a value in the *Next Review* field.

PE Benefit Group

If you use the *Benefits Administration* function in Infinium HR and you created personnel benefit groups, you can use this field to assign the employee to a benefit group.

You can retain the personnel benefit group code that defaults from the position control record or you can type an override personnel benefit group code in this field.

When you type a code for a benefit group in this field, the system displays a screen at the end of the *Enter New Hire* option from which you can enroll the employee into authorized benefit plans.

Pay Frequency

Type a pay frequency that indicates how often you expect to pay this employee.

The value you type in this field must be compatible with the value you type in the *Scheduled Pay Pds* fields. For example, if you type **52** in the *Scheduled Pay Pds* field, type **W** in this field.

Type one of the following frequencies in this field:

D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
10	10 pay periods per year
13	13 pay periods per year
22	22 pay periods per year

27	27 pay periods per year
53	53 pay periods per year

Pay Type

Information in this field defaults from the job control record. The value you type in this field does not affect the personnel base rate you type on this screen. The system uses this field to automatically compute payroll rate(s) when personnel users enter salary change transactions using the *Enter Personnel Actions* function.

The pay type you specify in this field must be compatible with the value you type in the *Payroll Rate 1* field. For example, if you specify **H** (hourly) in this field, the *Payroll Rate 1* field should contain a dollars per hour rate.

Type one of the following values in this field:

S	Salaried: the employee is paid a flat amount per pay period and is exempt from overtime payment requirements.
N	Non-exempt salaried: the employee is paid a flat amount per pay period and is covered by overtime payment requirements.
H	Hourly: the employee is paid by the hour. The employee may or may not be subject to overtime payment requirements.

The system does not use the *Pay Type* field to verify information during payroll cycle processing. You can pay overtime to employees classified as pay type **S** without receiving an error or warning.

Job Code 1, 2 or 3

The value in *Job Code 1* field defaults from the position control to which the employee is assigned. If you want to record additional jobs for this employee, type the applicable job codes in the *Job Code 2* or *Job Code 3* fields.

Job Rate 1, 2 or 3

Type a rate in this field, if you pay this employee by the job. You can refer to the “Pay by Job Processing” chapter of the *Infinium PY Guide to Processing* for additional information.

Payroll Rate 1

You can use the *Payroll Rate 1, Payroll Rate 2* or *Payroll Rate 3* fields to establish payroll rates for this employee. The system uses *Payroll Rate 1* to compute incomes during cycle processing if you entered **B** in the *Income Basis* field on the associated income control record(s).

Typically, the value you type in the *Payroll Rate 1* field is equivalent to the value you enter in the *Personnel Rate* field, even if the rates are stated differently. For example, you can enter the employee’s personnel rate on an annual basis but state the employee’s payroll rate 1 on a weekly or hourly basis. If you enter **25000** as the employee’s annual personnel base rate, you would enter **480.77** as the employee’s payroll rate 1 if you pay the employee on a weekly basis using a flat amount income, or **12.02** if you pay the employee using an hourly income.

You can use the List Employee Base Pay Rates report in Infinium PY’s *List Employee Data* function to verify that the personnel base rate and payroll rate 1 are equivalent for employees even if they are stated differently.

Leave this field blank if you have not defined any income controls whose basis is **B**.

The value you type in the *Payroll Rate 1* field must be compatible with the value you type in the *Pay Type* field on the following screen. For example, if you type a dollar per hour rate in this field, you must specify **H** (hourly) in the *Pay Type* field on the following screen. If you type a flat amount in this field, you should enter either **S** (salaried) or **N** (non-exempt salaried) in the *Pay Type* field on the following screen.

Payroll Rate 2

If applicable, type the employee’s second payroll rate. The system uses *Payroll Rate 2* to compute incomes during cycle processing if you entered **2** in the *Income Basis* field on the associated income control record(s). Typically, you use this field for an exception or alternate rate.

For example, in your transportation company you pay truck drivers at their standard hourly rate when they drive alone and a lower hourly rate when they share the driving with another employee. You set up two hourly incomes. The first income for solo drivers uses payroll rate 1; the income for team drivers uses payroll rate 2.

Leave this field blank if you have not defined any income controls whose basis is **2**.

Payroll Rate 3

If applicable, type the employee's third payroll rate. The system uses *Payroll Rate 3* to compute incomes during cycle processing if you entered **3** in the *Income Basis* field on the associated income control record(s). Typically, you use this field for an exception or alternate rate.

For example, in your school you have some employees who work full-time as teachers and part-time as coaches. They receive two different rates of pay. You set up a flat amount income that uses payroll rate 1 to generate salaried earnings for teachers; you set up an hourly income that uses payroll rate 3 for coaching pay.

Leave this field blank if you have not defined any income controls whose basis is **3**.

ERP LX Shop Fl?

Specify yes if this employee is also an Infor ERP $_{LX}$ shop floor employee. Otherwise, specify no.

Updating Employment Eligibility Data – U.S. Employees Only

2 Before exiting this screen, you can press F8 to display the Employment Eligibility Verification screen. You use this screen to enter I-9 information for the new employee. After you complete the Employment Eligibility Verification screen, press Enter to return to Enter New Hire screen 2.

You can enter this information during the new hire process or after the new hire process is complete. See the "Updating Additional Employee Data" chapter of the *Infinium HR Guide to Processing* for further information.

Updating Foreign National Data

3 Before exiting this screen, you can press F9 to display the Update Foreign National Data screen. You use this screen to enter non-domestic compensation information for the new employee. After you complete the Update Foreign National Data screen, press F3 to return to the Enter New Hire screen 2.

You can enter this information during the new hire process or after the new hire process is complete. See the "Updating Additional Employee Data" chapter of the *Infinium HR Guide to Processing* for further information.

Calculating pay rate 1

4 Before exiting this screen, you can press F11 to calculate the *Pay Rate 1* field value. The calculation is based on the values in the *Personnel Rate*, *Base Frequency*, *Regular Hours*, *Pay Frequency*, and *Pay Type* fields.

5 When done with Enter New Hire screen 2, press Enter. The system displays Enter New Hire screen 3 (Payroll Information).

Processing Enter New Hire Screen 3 (Payroll Information)

Enter New Hire screen 3 (Payroll Information) provides fields for payroll information such as the pay cycle and separate additional sets of fields for federal and Quebec details.

1 Use the following information to complete the fields on this screen:

Pay Cycle

Type the code that represents the regular payroll cycle to which you assign this employee. You must assign each employee to a regular cycle for normal processing. You can process special checks through other cycles, such as a bonus or on-demand cycle; however, you do not assign the employee to a special cycle.

If the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the *Payroll Cycle* value from the position defaults record for the new hire's selected position is used as the default value for this field.

Auto Pay Group

If you want to generate incomes automatically for this employee during cycle processing, type the code that represents the auto pay group in this field. You create code values through the *Update Employer Codes* option using code type **APG** and assign incomes to the auto pay group using the *Update Auto Pay Groups* function.

If the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the *Auto Pay Group* value from the position defaults record for the new hire's selected position is used as the default value for this field.

Competing the FEDERAL Fields

2 Use this information to complete the fields in the Federal section of the screen. You can enter information into these fields for employees in all provinces. The fields described below do not follow cursor flow, but are best discussed in the following order.

Province

Type the code value that represents the province in which this employee works.

Net Claim Amount

Type the appropriate net claim amount in this field as indicated on this employee's TD1 form. If you leave this field blank, the system uses the current minimum amount specified on the Infinium PY tax tables.

Additional Tax

You can use this field to withhold an additional amount for taxes, at an employee's request. Type the additional amount to be withheld for tax purposes, as indicated on the employee's TD3 form.

HD Annual Ded

If the employee resides in the Yukon, Northwest Territories or another prescribed area for more than six continuous months, type the amount of the annual deduction. The value you type in this field must agree with the value on the employee's TD1 form.

Tax Off Deduct

Type the total annual deduction authorized by the District Taxation Offices. Authorized tax deductions can include such expenses as child care expenses, alimony payments and tuition fees.

Tax Off Credit

Type the amount of other federal tax credits authorized by the District Taxation Office.

For Canadian provinces that use the tax on income (TONI) method for calculating provincial tax, use the *Prov Tax Off Cr* field on the Update Employee Deduction Codes screen to record the provincial tax office credit amount for *CF deductions. Infinium PY can then calculate the federal and provincial components of income tax by using different tax office credit amounts, if applicable.

Annual Income

If you type **1** in the *Commissioned* field, you must type an estimated annual income in this field (based on the TD1X form).

Expenses

If you type **1** in the *Commissioned* field, you must type the estimated amount of expenses (previous year actual or current year estimates) in this field.

No Tax Status

If the employee's TD1 form indicates a net claim code of E, type **1** in this field.

Leave this field blank, if the TD1 form indicates anything other than E.

The system accumulates year-to-date wages; it does not withhold income tax from earnings.

PY Auth. Group

Use this field to assign the employee to a pre-defined set of income and deductions.

You establish payroll authorization groups when you set up your system controls. For additional information on establishing payroll authorization groups, refer to the *Infinium PY Guide to Controls*.

If you are using Infinium HR and you specified a value in the *PY Auth Group* field on the Update Organization screen of the *Update Position Data* function, the system uses that value as the default for this field.

This default feature saves time when you are entering new hires. You can override the default value in this field if necessary.

Net Claim = 0?

Type **1** in this field, if the employee is a non-resident and does not receive more than 90% of earnings in Canada.

Type **0** in this field if the net claim code is anything other than 0.

The value you type in this field must agree with the code an employee claims on the TD1 form.

Tipped Employee

Use this field to establish the employee's status for tip allocation processing.

Type one of the following values in this field:

0	This employee does not earn tipped income.

1	U.S. only: This U.S. employee receives tipped income and is to be included in tip allocation processing.
2	U.S. only: This U.S. employee receives tipped income but is not to be included in tip allocation processing.
3	Canada only: This Canadian employee receives tipped income that should be identified as such on the RL-1 tape.

If the employee is included in tip allocation processing, the type of tips (direct or indirect) must also be specified for the tips income during timesheet entry.

Non-Resident

Type **1** in this field if the employee is a non-resident and if you typed **1** in the *Net Claim Code* field.

A non-resident employee is one who works less than 183 days per year in Canada.

Leave this field blank, if non-resident status does not apply to this employee.

Commissioned

If you pay the employee on commission or salary plus commission, type **1** in the field.

Leave this field blank, if you do not pay employees by salary or salary plus commission.

WLRP Exclusion

Employers with Wage Loss Replacement Plans must link reduced unemployment insurance premiums to the *CUIC deduction. You type the UIC identification numbers and reduced employer rates on screens 2 and 4 of the *CUIC deduction control record.

Type **0** if you want the system to use the employer's reduced UI rate on the second screen of the *CUIC deduction. Type **1** if you want the system to use the standard employer UI rate from the tax tables.

If you have additional UI rates, you type the number that corresponds to the line number on which you entered the employer's identification number and reduced rate on the fourth screen of the *CUIC deduction control. Refer to the *Infinium Payroll Guide to Controls* for additional information on establishing deduction controls.

Annualize EEA Sal

Specify yes if this employee requires that the salary reported on the Employment Equity Report be annualized instead of the salary amount earned for the reporting year.

Completing the QUEBEC Fields

3 Use the following information to complete the fields in the QUEBEC section of this screen. Leave these fields blank for employees who do not pay taxes in Quebec.

The fields described below do not follow cursor flow, but are best discussed in the following order.

No Tax Status

Type **1** in this field if the employee enters **X** in the deduction code line on his or her TP-1015.3-V form.

Type **0** if the employee's TP-1015.3-V form indicates anything other than **X** in the deduction code line.

If you type **1** in this field, the system accumulates year-to-date wages but does not withhold Quebec income tax from the employee.

Net Claim Amount

If the employee specifies a claim amount greater than the Quebec minimum basic value on his or her TP-1015.3-V form, type the net claim amount for this employee. The claim amount you type in this field must agree with the value the employee enters in the total line above the deduction code line on the TP-1015.3-V form.

The system uses this value to compute the E variable in the Quebec provincial income tax calculation.

When you leave this field blank the system retrieves the current minimum value specified on the Infinium PY Quebec provincial tax table.

You must leave this field blank if you enter **1** in the *QC-Net Claim = 0?* field.

Additional Tax

Type the additional amount of tax to be withheld if requested by the employee. The value you type in this field must agree with the amount the employee specifies on one of the following forms:

- TP-1017-V: Request to Have an Additional Tax Withheld at Source

- TP-1015.N-V: Election by Fishermen to Have Income Tax Deducted at Source
- TP1015.3-V: Source Deductions Return

The system uses this value to compute the L variable in the Quebec provincial income tax calculation.

HD Annual Ded.

Type the total annual amount of other deductions and credits the employee has entered on his or her TP-1015.3-V form including those for:

- Support payments
- Residing in a designated remote area
- Amounts respecting a severe and prolonged mental or physical impairment
- Child care expenses

The system uses this value to compute the J variable in the Quebec provincial income tax calculation.

Tax Off. Ded.

Type the total of other annual deductions authorized by the Ministere du Revenu du Quebec including the deduction granted to an employee working outside Canada. You must make an adjustment if you enter this value after the first pay period of the calendar year for an employee. Refer to information provided by the Quebec provincial government for instructions.

The system uses this value to compute the J1 variable in the Quebec provincial income tax calculation.

Tax Off. Credit

Type the total of other annual non-refundable tax credits authorized by the Ministere du Revenu du Quebec including tax credits for medical expenses and charitable donations. You must make an adjustment if you enter this value after the first pay period of the calendar year for an employee. Refer to information provided by the Quebec provincial government for instructions.

The system uses this value to compute the K1 variable in the Quebec provincial income tax calculation.

QC-Net Claim = 0?

Use this field to identify employees who claim a Quebec income tax exemption amount of nil (zero). Use the deduction code value entered on the employee’s TP-1015.3-V form to complete this field. Valid values are:

1	Yes. The employee's deduction code value is nil (zero).
0	No. The employee's deduction code value is between **A** and **N**.

You typically type **1** in this field for an employee who is in one of the following situations:

- The employee has worked for more than one employer or payer in the calendar year and has already claimed the Quebec basic exemption amount.
- The employee is not a resident of Canada and spends fewer than 183 days in Quebec.

You must enter **0** in this field if you enter a value in the *Net Claim Amount* field.

4 Press Enter. The system displays Enter New Hire screen 4 (Contact and Miscellaneous Data).

Processing The Enter New Hire Contact and Miscellaneous Data Screen

The Enter New Hire Contact and Miscellaneous Data screen provides two sets of fields:

- Fields for communicating with the employee including telephone numbers, e-mail addresses and a web URL address
- Fields for miscellaneous information such as a classification you define for reporting purposes like executive, managerial or clerical, the recruitment source such as advertising on the web, veteran, felony, alien registration, license information and spouse and supervisor information

1 Use the following information to complete the fields on this screen:

Entering Contact Information

Office Tel. No.

Type the employee's telephone extension or complete office telephone number including area code. The system can use this information to generate telephone directories.

Misc Phone #1, #2 and #3

Type any other telephone numbers where this employee can be reached, such as the employee's cellular phone number. Examples: **617-555-9999** for number in Boston, Massachusetts, **011-44-204-999999** for an international number in Dorset, England.

Email Address #1 and *#2*

Type one or two e-mail addresses where this employee can be reached such as John_Smith@XXX.com.

URL Address #1

Type the URL (Uniform Resource Locator) associated with this employee, if any, such as www.XXXCorp.com.

Entering Miscellaneous Information

The miscellaneous information fields are informational only and can be used to meet your company's business and reporting needs.

Class

You can use this field to classify employees for reporting purposes. For example, you can use this field to classify employees into categories such as clerical, managerial or executive. You use Infinium QY to develop reports using this field.

You define code values for this field using code type **CLA.**

Hire Source

Specify the recruitment source for this employee. You define code values for this field using code type **HIR**.

There can be a default value from the employee's applicant data.

Security Group

You can use this field to restrict user access to this employee's records in the system. To use this feature you must:

- Establish security group code values for the code type **SEC** through the *Update Employer Codes* function.
- Use this screen or screen 3 of the employee's basic data record to enter the code for the security group to which you assign the employee. A default security group code can come from the job control to which the employee is assigned.
- To prevent users from accessing records of employees in this security group, specify the group restriction in the users' profiles through the

Update User Security Controls function. For details, refer to the *Infinium HR Guide to Management Functions.*

Office Tel No

You can use this field to type the employee's office telephone number, extension or both full telephone number and extension.

You can generate an office phone directory based on information from this field using the Infinium HR *Administrative Reporting / Miscellaneous Reporting / Internal Telephone Directory* [ITD] function. For additional information, refer to the *Infinium HR Guide to Processing*.

Veteran's

Type the code value that represents the employee's military status. You establish code values for the code type **MIL** through the *Update Employer Codes* option.

Handicap

Type the code value that identifies the employee's handicap status. You create the code values for this code type through the *Update Employer Codes* option using code type **HDC**.

Ex - Felon

You can use this field to record an employee's criminal conviction information. Type either:

0	No, this employee is not a convicted felon.
1	Yes, this employee is a convicted felon.

Alien Reg No

If this employee is a legal alien, type the employee's alien registration number in this field.

License

You can use this field to specify a code value that represents a license held by this employee. You create code values using code type **LTP** in the *Update Employer Codes* function.

For example, health industry employers can track licensing data for registered nurses, doctors, pharmacists and so on. Transportation companies can maintain driver's license information for employees.

The license code that you type in this field defaults into the *License Code* field in the Infinium HR *Update Employee License Data* function. You can use this function to enter additional related information, such as the issue date and expiration date of the license, the license number, license status, licensing authority and cost.

This field can contain a default from the *License Code Req* field on the job control for the job to which the employee is assigned.

License Expires

You can use this field to record the expiration date of the license you typed in the *License* field.

The license expiration date you type in this field is the default for the *Expiration* field in the *Update Employee License Data* function.

Spouse Name

If the employee is married, type the name of the employee's spouse.

Leave this field blank if the employee is not married.

Sup. Employer

Specify the employer of the employee's supervisor.

Sup. Name

Press F4 to display a list of valid supervisor names.

2 Press Enter. The system displays the Update PTO Accruals screen for processing paid time off (PTO) information.

Processing the Employee's PTO Accruals

On the Update PTO Accruals screen and other screens that you can access from the Update PTO Accruals screen, you can authorize the employee's participation in one or more paid time off accrual plans.

Setup Required

Defining paid time off accrual information for a new employee requires the following prior setup for the employer:

- Definition of paid time off accrual categories such as vacation, sick time and STD (short term disability) in the employer controls. You can define up to six categories for each employer.

- Definition of individual paid time off benefit plan codes in *Update Employer Codes* using code type **ACR**. For example, you can define **VACS** as the code for a vacation plan that applies to salaried employees and **VACH** as the code for the plan for hourly employees.
- Definition of each plan's rules through *Update Accrual Controls*. For example you can specify whether to track hours or dollar amounts or both under this plan, and the rate at which these are accrued. These controls also specify whether you are tracking the history of paid time off accrual transactions for employees assigned to the plan.

Defining plans by code allows you to specify different methods of calculating paid time off hours or dollar amounts for different groupings of employees. For example, you can do the following:

- Define different vacation plan rules for employees who work in different Canadian provinces in order to meet provincial regulations
- Define different vacation plan rules for employees who are or are not represented by a specific union

Pay Period Accrual Processing

Once you have assigned the employee to paid time off accrual plans in *Enter New Hire*, the system uses the information when you run *Calculate Benefit Accruals* after each pay period. The system credits the employee with the appropriate number of accrued and earned paid time off hours and/or dollars and reduces the employee's earned hours and/or dollars by the amount the employee took that pay period.

For more information on establishing accrual controls and maintaining accrued and earned hour and dollar amount balances for employees, refer to the *Infinium PY Guide to Management Functions*.

Processing the Update PTO Accruals Screen

On the Update PTO Accruals screen, you can authorize the employee to participate in applicable paid time off plans. This screen provides two lines of fields for each paid time off category defined for this employer, such as Vacation.

To assign an employee to a specific plan, specify the plan's code next to the applicable category such as **VACS** next to the Vacation category.

The column headings apply to the two lines per category. For example, the *Hours/Amount Earned* column provides a field for accrued hours on the first line and a field for accrued dollar amounts on the second line.

When you first assign the employee to a plan during *Enter New Hire*, you can also specify the eligibility date and, if applicable, any hours and/or dollar amounts that the new employee is receiving effective with the date of hire.

Once you have specified a plan and its initial information, you can edit the information directly on this screen only if the plan's accrual controls indicate that you are not tracking accrual transaction history for this plan. If you are tracking history you must access the PTO accrual history screens as indicated later in this procedure.

Do not press Enter until you are done with this employee's PTO accrual information. When you press Enter at this screen, the system exits PTO accrual information and continues to User Defined Data screens.

Update PTO Accruals Screen Fields

1 Use the following information to complete the fields on this screen. Ordinarily, only the *Code*, *Elig Date* and under some circumstances the *Ovr %* field apply during entry of a new employee.

If the system does not allow you to access the fields for a plan at this screen after you have typed information, continue to the next step to access the history and transaction screens for that plan.

Accr Type

In the *Accr Type* column, the system displays each accrual category specified in this employer's controls.

Hours Earned, Accrued, Taken, Remaining

These hour fields are on the first line of information for each plan. They do not ordinarily apply during entry of a new employee.

The system updates the *Hours Earned* and *Hours Accrued* fields each time you run *Calculate Benefit Accruals*.

The value in the *Hours Accrued* field represents paid time off hours an employee has earned but cannot yet take. The value in the *Hours Earned* field represents paid time off hours an employee has earned and can take at any time.

The system updates the *Hours Taken* field when you post a payroll cycle or an on-demand check. It represents the earned hours an employee has taken during the current accrual period.

The system automatically calculates and displays the *Hours Remaining* value by subtracting the value in the *Hours Taken* field from the value in the *Hours Earned* field.

Elig Date

Type the earliest date on which the employee is eligible to use this accrual type. When you run the *Prove Timesheet Data* function, the system compares this date to the pay period ending date of the cycle. It generates a warning message if you enter hours of a designated paid time off income for an employee whose eligible date is after the pay period ending date.

Ovr %

If you are accruing dollar amounts under this plan but a different percentage applies to this employee than the percent specified in the accrual plan controls, specify the override percentage here. The system uses this percentage rather than the percentage from the controls during *Calculate Benefit Accruals*.

To use the value from the accrual controls, or if you are accruing only hours under this plan for this employee, leave this field blank.

Amount Earned, Accrued, Taken, Remaining

These values are on the second line for each category and do not ordinarily apply during entry of a new employee.

The meaning and uses of these values are similar to those for the hours but are measured in dollar amounts rather than hours.

Under some circumstances, the system does not allow you to return to the fields for a plan that tracks accrual transaction history even during this initial session at this screen. For example, this happens if you have selected the plan with **5** to view the transactions created when you added this plan.

If this occurs when you need to make a change to the information before continuing the *Enter New Hire* procedure, you must create a new transaction to modify the information before leaving this screen.

2 To create a new transaction modifying the information, type **5** in *Opt* next to the category and press Enter. The system displays the Update PTO Accrual History screen.

Update PTO Accrual History Screen

3 On the Update PTO Accrual History screen, you can view the existing transactions for this employee under this plan and you can take either of the following actions:

- Type **5** next to a listed transaction and press Enter to view the transaction details on the Display PTO Accrual History screen. Press Enter to return to the Update PTO Accrual History screen.
- Press F6 to display the Create PTO Accrual History screen and enter a transaction.

For information about these screens' fields, press Help or refer to the "Processing Paid Time Off Accruals" chapter of the *Infinium PY Guide to Management Functions*.

When done with accrual history, press F3 at the Update PTO Accrual History screen to return to the Update PTO Accruals screen.

4 When done with paid time off accruals, press Enter at the Update PTO Accruals screen. The system displays Employee User Data screen 1.

Processing Enter New Hire User-Defined Data

The three employee user-defined data screens allow you to track information that is specific to your organization and not otherwise tracked in Infinium HR/PY. You must already have done the following:

- Defined descriptions for your user-defined fields in the Infinium HR or Infinium PY *Update User Defined Titles* function
- Defined code values for the code fields in the *Update Employer Codes* function using code types UC1 through UC9 and UCX

For details on defining the field titles and the code values, refer to the *Infinium HR* or *Infinium PY Guide to Controls*.

You can also later enter and update an employee's user-defined information through the *Update User Defined Data* function.

Employee User Data Screen 1

1 Use the following information to complete the fields on the first Employee User Data screen:

The system displays three types of user-defined data fields on this screen: code fields, amount fields and date fields. The field descriptions are as you defined them in your system.

Code Description, Value

You can type a code value in up to 10 user-defined code fields. Press F4 to display the name of the code type used for each field and the valid values that have been established for each code type.

Amount Description, Amount

You can type numeric information in up to 10 user-defined numeric fields. The system allows a value of up to 9,999,999.99 per field.

Date Description, Date

You can type a date in up to 10 user-defined date fields.

2 Press Enter. The system displays Enter New Hire User Data screen 2.

Enter New Hire User Data Screen 2

3 Use the following information to complete the fields on this screen:

The screen displays two categories of user-defined fields: hours and free-form characters.

Hours Description, Hours

You can type hours information into up to 10 user-defined hours fields. The system allows a value of up to 99,999,99 per field.

Description, Characters

You can type alpha-numeric information in up to 20 user-defined character fields. Each character field is 20 characters in length.

4 Press Enter. The system displays Employee User Data screen 3.

Enter New Hire User Data Screen 3

5 Use the following information to complete the fields on this screen.

The system displays two categories of user-defined fields on this screen: numeric and free-form comment.

Numeric Description, Value

You can type numeric information in up to 10 user-defined numeric fields. The system allows a value of up to 99,999,999,999 per field.

Description

You can use this large comment field to type miscellaneous information for the new employee. This is a 100-character free-form field that accepts alpha-numeric text.

6 Press Enter. The system displays the Update Employee Income Codes screen.

Processing the Employee’s Income Authorizations

On the Update Employee Income Codes screen, you can select and provide information for the incomes this employee is authorized to receive. If you specified a payroll authorization group for this employee on Enter New Hire screen 3, the system automatically displays the incomes associated with that group at the bottom of this screen.

If you do not need to authorize the employee to any additional income, make changes to the employee’s existing income authorizations, or delete the employee’s existing incomes, continue to “Processing the Employee’s Deduction Authorizations.”

1 Use the following information to authorize incomes for this employee at this Update Employee Income Codes screen.

Authorizing an Income for This Employee

Income Code

Specify the income that you want to assign to this employee. Press F4 to display a selection list of valid income codes.

2 Press Enter. The system displays fields for entering income authorization details in the middle of this screen. The fields may vary depending on the income you specified.

3 To provide details for this authorization, do the following:

- Type or select the cycle during which this employee can receive this income. You can enter the generic cycle name ***AUTO** if the system should auto-generate this income for the employee during any normal pay cycle to which this employee is assigned.
- Type any additional individual employee information for this income. Any information you type overrides information in the corresponding field in the income control record.

  For example, if you enter **2000** in the *YTD Limit* field on the income control, but specify **2400** in the *YTD Limit* field on this employee’s income authorization record, the system uses the higher employee value when it processes the employee's paycheck.

For additional information on creating income controls, refer to the *Infinium PY Guide to Controls*.

- If you specify a rate or amount, you must specify basis value **I**.
- If you use Infinium Self Service Time Entry, you can authorize employees to enter their own timesheet data for this income.

4 To override the value in the *Self Service Time Entry* field on Update Income Controls screen 2 of 3, type one of the following in the *Self Service Time Entry* field here:

1	Yes, allow this employee access to this income through Infinium *Self Service* Time Entry.
0	No, deny this employee access to this income through Infinium *Self Service* Time Entry.

If you leave this field blank, the system uses the value in the income control record.

5 Press Enter to save the information. The system adds the income code and summary details to the list at the bottom of this screen.

Changing an Existing Income Authorization

To change an existing income authorization listed at the bottom of this screen, type **2** in the *Opt* field next to that income and press Enter. The system displays information for that authorization in the middle of the screen.

Make the changes and press Enter again to return the updated authorization to the list on the bottom of the screen.

The system repositions your cursor to the *Income Code* field from which you can add, change or delete other income authorizations.

Deleting an Existing Income Authorization

To delete any listed income authorization, type **4** in the *Opt* field next to the appropriate income and press Enter. The system replaces the income authorization record in the list with **DELTD**. It removes the record completely when you press F3 to exit this screen.

Continuing to the Deduction Authorization Procedure

6 When done with income authorizations at the Update Employee Income Codes main screen, press F3. The system displays the Update Employee Deduction Codes screen.

Processing the Employee’s Deduction Authorizations

On the Update Employee Deduction Codes screen, you can select and provide information for deductions that are authorized for this employee.

If you specified a payroll authorization group for this employee on the Enter New Hire Payroll Information screen, the system automatically displays that group’s deductions at the bottom of this screen.

If you do not need to authorize the employee to any additional deductions, make changes to the employee’s existing deduction authorizations or delete the employee’s existing deductions, continue to “Processing the Employee’s Benefit Enrollments.”

Authorizing a Deduction for This Employee

1 Use the following information to authorize a deduction for this employee.

Deduction

Specify the deduction that you want to assign to this employee. Press F4 to display a selection list of valid deduction codes.

2 Press Enter. The system displays Update Employee Deduction Codes detail screen 1.

Update Employee Deduction Code Details Screen 1

3 On the Update Employee Deduction Code details screen 1, you can type information into any of the fields for this employee. The fields can vary depending on the type of deduction.

When you enter information into a field on this screen or the next details screen, it overrides information in the corresponding field on the deduction control record. For example, if you enter **50.00** in the *Deduction Amount* field on the deduction control, but specify an employee deduction amount of **25.00** here in this employee’s deduction authorization record, the system uses the lower employee value when it processes the employee’s paycheck.

For additional information on creating deduction controls, refer to the *Infinium PY Guide to Controls*.

If you specify a rate or amount, you must specify basis value **I.**

4 Press Enter. The system displays the second Update Employee Deduction Code details screen

Update Employee Deduction Codes Details Screen 2

5 The second Update Employee Deduction Code details screen includes fields for the employer general ledger accounts. If you select a non-tax deduction, the system displays additional fields.

You can use these fields to specify the basis used to calculate the employer's contribution to employee's benefit plans.

For example, you can specify that only wages up to $150,000 per year can be used to compute the employer's contribution to the employee's savings plan.

You can enter information in some or all of the fields, or leave all of them blank. You can also enter this information on the deduction control record so that it applies to all employees authorized to this deduction. See the *Infinium PY Guide to Controls* for details.

6 Press Enter to save the deduction information you entered.

Initial Update Employee Deduction Codes Screen

7 The system returns you to the initial Update Employee Deduction Codes screen and adds this deduction to the list of this employee's deduction authorizations.

Changing an Existing Deduction Authorization

To change any existing deduction authorization listed at the bottom of this screen, type **2** in the *Opt* field next to that deduction and press Enter. The system displays the two deduction details screens for you to make the changes as for a new deduction. Make the changes and press Enter at each screen.

When you press Enter at the second details screen, the system returns you to the initial screen and displays the updated authorization summary in the list on the bottom of the screen.

The system repositions your cursor to the *Deduction* field from which you can add, change, or delete other deduction authorizations.

Deleting an Existing Deduction Authorization

To delete any listed deduction authorization, type **4** in the *Opt* field next to the appropriate deduction and press Enter. The system replaces the authorization record in the list with **DELTD**. It removes the record completely when you press F3 to exit this screen.

Continuing to the Employee Benefit Enrollments Procedure

8 When done with deduction authorizations at the Update Employee Deduction Codes main screen, press F3. The system displays the Select Benefit Plan Year screen.

Processing the Employee's Benefit Enrollments

Refer to the *Infinium HR Guide to Setup and Processing for Benefits Administration* for detailed information on establishing employee benefit plans and enrolling employees in plans.

Use the following information to specify benefit enrollment information for this employee.

Select Benefit Plan Year Screen

1 If you use plan year processing, specify the plan year to use for the employee's benefit plan enrollments.

If your employer is set up to use plan year processing, the system uses a default *Plan Year* field value from the *Update Benefit Controls* function. Verify with your benefits administrator what plan year to use for new hires before you change the default value.

If you do not use plan year processing, leave blank.

2 Press Enter. The system displays the Update Employee Benefit Enrollments screen.

Update Employee Benefit Enrollments Screen

On the Update Employee Benefit Enrollments screen, you can specify the benefits in which this employee is enrolling.

If you assigned a personnel benefit group to this employee on Enter New Hire screen 2, the system displays a list of benefits for which the employee is eligible.

3 Type **5** in the *Opt* field next to each benefit plan selected by the employee.

4 Press Enter. The system displays a screen for each benefit plan you select for this employee, unless the benefits administrator has defined a plan as an auto entry plan.

Continue to press Enter to proceed through the selected benefit plan screens. The system creates a pending enrollment record in each plan for the employee.

The employee is not actually enrolled in the plans until the Benefits Administrator runs the *Mass Update Employee Enrollments* function. The system authorizes the employee to deductions associated with the employee's benefit plans when you process the Begin step of pay cycle processing.

5 To work with beneficiary and dependent information for this employee, press F5 to access the Update Dependents/Beneficiaries screen.

Update Dependents /Beneficiaries Screen

Provide the applicable information and press F3. The system displays the Employee Topic List selection screen.

Employee Topic List Selection Screen

On the Employee Topic List selection screen you can do the following:

- Update employee information by typing **2** in the *Opt* fields next to the topic to update.
- Display employee information by typing **5** in the *Opt* fields next to the topic to display.
- Refresh the default values in the *Opt* field by pressing F5.
- Save the values you entered into the *Opt* fields by pressing F16.
- Clear the default values displayed in the *Opt* fields by pressing F17.

6 Type **2** next to the topic to update.

7 Press Enter. The system displays the screen for the topic you selected.

8 Update the topic and press Enter. The system displays the next topic you selected. When you complete updating the selected topics and press Enter, the system returns to the Employee Topic List selection screen.

9 Press F3 to return to the Enter New Hire prompt screen from which you can hire additional employees.

Initial Enter New Hire Prompt Screen

When returned to the initial Enter New Hire prompt screen, you can repeat the preceding procedures to enter information for another new employee.

You cannot use the *Enter New Hire* function to change information you have already entered for an employee.

Refer to the “Updating Employee Data” chapter of the *Infinium HR* or *Infinium PY Guide to Processing* for information on how to make changes to information for current employees.

Exiting the *Enter New Hire* Function

When done entering new employees, press F3 at the initial employee prompt screen to exit to the menu.

Generating Reports To Verify New Employee Information

To verify key information about new employees hired during a specified time period, you can use the following Infinium HR functions:

- *Employee Data / List Employee Data / List PE Actions*
- *Employee Data / List Employee Data / List PE Action Details*

Chapter 7 Updating Employee Data

7

This chapter provides an overview to the process for updating employee data.

The chapter consists of the following topics:

Overview of Updating Employee Data

You use the *Update Employee Data* function to review or update information about employees after you enter their hiring information into Infinium HR/PY. To enter hiring information for employees, you normally use the *Enter New Hire* function in either Infinium HR or Infinium PY; as an alternative, you can use the *Update Employee Data* function in either Infinium HR or Infinium PY. The *Enter New Hire* method of hiring employees is described in detail in previous parts of this guide and in the *Infinium PY Guide to Processing*.

Regardless of which method you use, the system automatically establishes information for the new employee in several files including basic data and personnel data. Basic data is accessible to users of both Infinium HR and Infinium PY. Personnel data is accessible only to Infinium HR users.

Basic data consists of six screens of essential employee information including the employee's name and number, tax identification number (Social Security number in the U.S., Social Insurance number in Canada), home address, hiring position, hire date and so on.

Personnel data consists of three screens of mostly optional information including the employee's actual marital status and spouse's name.

To view or update the hiring information you can use options within the *Update Employee Data* function. If you entered skills or education data in the *Applicant Administration* function for the new employee, the system automatically transfers this information to options within the *Update Employee Data* function as well. You can use the *Update Employee Data* functions to review and update this information.

In addition to reviewing information transferred from the employee's applicant data record or new hire transaction, you can also record additional information about employees using options within the *Update Employee Data* function.

You find the following options within the *Update Employee Data* function:

Type of Information	Description
Basic data	Contains six screens of essential employee information including name, number, tax identification number, home address and telephone number, position, job, level and pay grade assignments, hire date, birth date and base pay rate.
Personnel data	Contains three screens of chiefly optional information including actual marital status and spouse name, emergency contact information, veteran's information and military information.
Education data	Contains formal education and tuition reimbursement information. Can have multiple records for each employee.
On-the-job training data	Contains employee skill information and on-the-job training data. Can have multiple records for each employee.
Property data	Contains information about company property issued to employees. Can have multiple records for each employee.
Dependents data	Contains information about dependents and beneficiaries of employees. Can have multiple records for each employee.
Automobile data	Contains information about employees' personal cars, including make and model, license and registration numbers and assigned parking space and lot.
Log data	An on-screen memo area where you can enter lengthy free-form text about an employee; can specify a notify date and direct the note to yourself or another Infinium HR user. Can have multiple records for each employee.
Eligibility data	Contains I-9 information that you can use to verify eligibility to work in the US.
Used-defined data	Contains three screens of user-defined fields for use in tracking information that is unique to your company or business.
Pay component data	Used to assign pay component codes to an employee. The system uses pre-defined dollar values for each pay component to compute the employee's base rate.

Type of Information	Description
Foreign national data	Used to track the pay of employees on foreign assignments. Can state the employee's annual rate in U.S. or Canadian dollars or in foreign currency.

You can update information for employees using the options listed above within the *Update Employee Data* function. However, if you want to update certain key information and keep an ongoing historical record of the changes, for such activities as performance reviews, salary changes, promotions, demotions, transfers, status changes, terminations, rehires and miscellaneous employment events, you should use the *Enter Personnel Actions* function. This function updates information in the employee's basic, personnel and payroll data records and also builds an on-line employment history for the employee.

The "Entering Personnel Actions" chapter and the "Using Additional Personnel Action Functions" chapter that follow this chapter provide you with detailed information about using the *Enter Personnel Actions* function.

When you complete this chapter, you should be able to:

- Identify employee information created during the new hire process including basic data, personnel data and the hire transaction record.
- Be aware of the additional information you can enter for employees within the *Update Employee Data* function.
- Understand where you locate the payroll information for the new employee including:
  - Payroll data
  - Income data
  - Deduction data

This chapter is divided into these sections:

- Working with Employee Information
- Finding Information about the *Update Employee Data* Functions
- Accessing the *Update Employee Data* Functions
- Locating Payroll Information

Working with Employee Information

You use the *Enter New Hire* function to hire new employees into Infinium HR/PY if both Infinium HR and Infinium PY are installed at your location and you have established position controls in Infinium HR. The *Enter New Hire* function is available on both the Infinium HR and Infinium PY menus and performs in an identical manner. Information on the alternate methods to hire a new employee is described in the section below the following table.

Your security administrator for Infinium HR/PY determines if you use some or all of the ten *Enter New Hire* screens. See the parts entitled “Hiring New Employees into US Employers” or “Hiring New Employees into Canadian Employers” for details on how to use this function to establish information for new employees on Infinium HR/PY.

If you use all the screens of the *Enter New Hire* function, the system automatically creates information for the new employee in the files shown in the following table. The related screen number(s) from the *Enter New Hire* function are indicated in parentheses.

Description	System	Key Information
Basic data (*Enter New Hire* screens 1,2,5)	Infinium HR Infinium PY	Employee number, employee name, address, phone number, date of hire, job, position and level assignments, pay grade data, status, base rate, paid-time-off accrual balances.
Personnel data (*Enter New Hire* screens 1, 4)	Infinium HR	Actual marital status, emergency contact information, military data, spouse name, handicap code, preferred language, visa information, prior job, position and level assignment.
Payroll data (*Enter New Hire* screens 2 & 3)	Infinium PY	Cycle assignment, auto pay group, authorization group, payroll rate(s), federal, state/province and local tax filing information.
User-defined data (*Enter New Hire* screens 6,7,8)	Infinium HR Infinium PY	Seven categories of user-defined fields including codes, amounts, dates, hours, character fields, numeric fields and a lengthy comment field.
Income data (*Enter New Hire* screen 9)	Infinium PY	Employee income authorizations

Description	System	Key Information
Deduction data (*Enter New Hire* screen 10)	Infinium PY	Employee deduction authorizations including statutory taxes
Benefits data (*Enter New Hire* screen 11)	Infinium HR	Employee benefit enrollments

Using the Update Employee Data Method to Hire New Employees

If you have only Infinium HR installed at your location, you use the *Update Employee Data* function in Infinium HR to hire new employees onto Infinium HR. If you have both Infinium HR and Infinium PY installed at your location, but have not established position controls in Infinium HR, you use the *Update Employee Data* function on Infinium PY to establish information for new employees. There are no screen security restrictions when you use the *Update Employee Data* function to hire employees onto Infinium HR or Infinium PY.

The system creates information in different files, depending on whether you use the *Update Employee Data* function on Infinium HR or Infinium PY to establish new employee information as shown in the following table:

System	Employee Information Established:
Infinium HR	Basic data, personnel data, hire transaction
Infinium PY	Basic data, payroll data, income data, deduction data

Note: If you use the *Update Employee Data* function in Infinium PY to hire a new employee, a record is not created in the Personnel Master file, PEPMS. If you want to create a hire transaction for the employee by using the *Enter Personnel Actions* function, you must first manually create the Personnel Master record for the employee by using the *Update Personnel Data* function in Infinium HR.

Updating Employee Information

You can update information in any of the records listed in the above table after you use one of the methods available to enter hiring information for the new employee into Infinium HR/PY. However, when you want to make significant changes to the employee's basic data information and save the employee's prior information in history, you use the *Enter Personnel Actions* function rather than entering the new information directly into fields on the basic data record.

For example, you would use the *Enter Personnel Actions* function to make changes to the employee's salary, status and position, job and level assignments, as well as to terminate and rehire the employee.

When you enter a Personnel Action transaction, the system creates a record in the employee's on-line history and, depending on the type of transaction you enter, automatically updates the employee's basic data, personnel data and payroll data records with the new information. The "Entering Personnel Actions" chapter describes in detail how to enter personnel actions.

Entering Additional Employee Data

You can enter information in files that are not included in the hiring functions after you establish the employee's basic data record on Infinium HR/PY. Some of this information can default from the employee's skills and education information associated with the employee's applicant data record, even though it is not included in the screens within the *Enter New Hire* function.

You can access some of the additional information screens below using function keys associated with certain screens in the *Enter New Hire* function. Other information in the following functions is not part of the applicant data record and cannot be accessed from the *Enter New Hire* screens.

The following table includes all of the options you use to enter additional information about the employee within the *Update Employee Data* function. The table indicates which applicant or employee data functions are related to these additional information screens.

Function	Related Option
Update Education Data	Applicant Education Data screen within the *Update Applicant Data* function.
Update On-Job-Training Data	Applicant Job Training Data screen within the *Update Applicant Data* function.
Update Property Data	None
Update Dependents Data	*Update Employee Enrollments* function within Benefits Administration.

Function	Related Option
Update Automobile Data	None
Update Log Data	None
Update Eligibility Data (US) (used for U.S. I-9 information)	Can use F8 to access from Screen 2 of the *Enter New Hire* function.
Update User Defined Data	Screens 6, 7 and 8 of the *Enter New Hire* function.
Update Pay Component Data	See the “Using Pay Components” chapter to be included in Volume 2 of this guide.
Update Foreign National Data	Can use F9 to access from Screen 2 of the *Enter New Hire* function.
Hire Transaction	Created by the *Enter New Hire* function or the *Update Employee Data* hire function on Infinium HR. Not accessible from the Infinium HR main menu.

Finding Information about the *Update Employee Data* Function

You learn how to work with and update basic data in the “Updating Employee Basic Data” chapter.

You learn how to work with and update personnel data in the “Updating Employee Personnel Data” chapter.

The “Updating Additional Employee Data” chapter includes information on how to work with the following options within the *Update Employee Data* function:

- Education data
- On-the-job training data
- Property data
- Dependents data
- Automobile data
- Log data
- Hire transaction
- Eligibility data
- User-defined data
- Foreign national data

The “Entering Personnel Actions” chapter provides you with additional information about updating the hire transaction record that the system creates when you use the *Enter New Hire* function or the *Update Employee Data* function on Infinium HR to establish employee information.

The only option within the *Update Employee Data* function that is not documented in this guide is the *Update Pay Component Data* function.

A brief overview of the payroll information you create when you use the *Enter New Hire* function is included at the end of this chapter. See the *Infinium PY Guide to Processing* for detailed information on the employee Payroll Data, Income Data and Deduction Data screens.

See the *Infinium HR Guide to Setup and Processing for Benefits Administration* for details about how to set up and use the *Benefits Administration* function on Infinium HR.

Accessing the *Update Employee Data* Function

You can access all but one screen of the employee data records listed in the preceding table from the Infinium HR main menu. Most of the information can also be accessed from the selection screen for the *Update Employee Data* function.

You cannot access the employee's hire transaction record from the Infinium HR main menu. You use the prompt screens for the *Update Employee Data* function or the *Enter Personnel Actions* function to access the employee's hire transaction.

The table below summarizes the ways you can access the employee information discussed in the following two parts. It also includes the Quick Access codes in brackets for the options that you can access from the Infinium HR main menu.

Employee Information	How to Access
Basic data [**UEB**] Personnel data [**UEP**] Education data [**UEE**] On-job training data [**UEO**] Property data [**UEPR**] Dependents data [**UED**] Automobile data [**UEAD**] Log data [**UEL**]	From the Infinium HR main menu or From the Update Employee Data prompt screen
Hire transaction	From the prompt screen for the *Update Employee Data* function or From the prompt screen for the *Enter Personnel Actions* function
Eligibility data [**UI9**] User-defined data [**UEU**] Foreign national data [**UFN**]	From the Infinium HR main menu

Locating Payroll Information

In addition to all of the Infinium HR employee information referred to in the preceding table, the system creates information in Infinium PY for each new employee when you use the *Enter New Hire* function. This information is briefly summarized in the following table. Refer to the *Infinium PY Guide to Processing* for details on how to review or update this information.

Category	*Enter New Hire* Screen Number	Key Information
Payroll data	3	Payroll cycle assignment; Federal, state or province and local tax data; payroll rates 1, 2 , 3; *Pay After Term* field; Payroll authorization group assignment; Check name & address
Income data	9	Identifies the incomes to which each employee is authorized.
Deduction data	10	Identifies the deductions to which each employee is authorized, including taxes and voluntary deductions.

Chapter 8 Updating Employee Basic Data

8

This chapter describes the process you use to update employee basic data records.

The chapter consists of the following topics:

Overview of Updating Employee Basic Data

In this chapter, you learn how to work with employee basic data. You establish a basic data record for each employee when you enter his or her hiring information into Infinium HR. To enter hiring information for employees, you normally use the *Enter New Hire* function in either Infinium HR or Infinium PY; as an alternative, you can use the *Update Employee Data* function in either Infinium HR or Infinium PY. The *Enter New Hire* method of hiring employees is described in detail in previous parts of this Guide and in the *Infinium PY Guide to Processing*.

Regardless of which method you use, the system automatically establishes information for the new employee in several files including basic data and personnel data. Basic data is accessible to users of both Infinium HR and Infinium PY. Personnel data is accessible only to Infinium HR users.

Basic data consists of several screens of essential employee information including the employee’s name and number, tax identification number (Social Security number in the U.S., Social Insurance number in Canada), home address, hiring position and hire date.

You can use the *Display Employee Data* function to view the employee’s basic data information on-line; you cannot make changes to the information with this function. See the “Displaying Employee Data” chapter for details on the many employee information displays available on Infinium HR.

The *List Employee Profiles* function provides you with a complete report of basic data information for one, some or all employees in the employer(s) you specify. There are many standard reports in Infinium HR that provide you with listings of selected basic data information, including *List Employees Data, List Employees by Number* and so on. The “Printing Employee Data” chapter provides you with an overview of the standard reports of employee data that you can generate on Infinium HR.

You can use the *Update Basic Data* function to make changes to the information in an employee’s basic data record by typing over the existing information in the fields. When you do this, the prior information is lost; therefore, you should use extreme caution when you enter information directly in the basic data record.

If you want to update certain key information in the basic data record and also keep an ongoing historical record of the changes, for such activities as performance reviews, salary changes, promotions, demotions, transfers, status changes, terminations, rehires and miscellaneous employment events, you should use the *Enter Personnel Actions* function. This function updates information in the employee's basic, personnel and payroll data records and also builds an on-line employment history for the employee.

Working with Basic Data

The system builds a basic data record for an employee when you use the *Enter New Hire* or *Update Employee Data* functions to hire the employee into your Infinium HR database. The basic data record contains key information about the employee including name, address, tax identification number, date of hire, position, job and level assignments, base rate, and so on. The basic data record is a shared file of information that can be accessed by users of both Infinium HR and Infinium PY.

The system security administrator at your site makes decisions regarding each user's access to the information in the basic data record. The administrator can restrict the number of screens or fields that you can view or update. The following discussion of the basic data record assumes that you have access to all six screens of this record and can see all of the fields on each screen.

Using Personnel Actions

The system allows you to update almost all of the information in the employee's basic data or personnel data screens. However, if you want to create historical information for the employee that can be used in reports and displays, you should update only those fields in basic data and personnel data that are not updated through the *Enter Personnel Actions* function. As illustrated in the following table, most of the fields in the basic data record are updated through the *Enter Personnel Actions* function or through other processing.

Before you use personnel actions, you must first define position controls and type **1** in the *Positions File Used?* field in the employer control record. When you use positions, the system does not allow you to type in certain fields in the employee's basic data record. These fields are updated automatically when the employee is assigned to a position. See the *Infinium HR Guide to Controls* for details on how to establish position controls. The following discussion assumes that you have established position control records and use personnel actions to update the employee's information.

The fields into which you cannot manually type information are identified in the following table. These fields and others in the employee basic data record that are updated by the *Enter Personnel Actions* function or other processing are shown below.

Field Name	Location in Basic Data Record	Related Personnel Action(s)
Last Name *Suffix* *Name Title* *First Name* *Middle Initial* *Middle Name* *Address* *City/Town* *State/Province* *Postal Code* *Country* *County* *User Field 1* *User Field 3* *Home Tel. No.*	Screen 1	Hire (HI) Personal Change (PC)
Level 1 *Level 2* *Level 3* *Level 4*	Screen 1 You cannot manually update the *Level* fields.	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Date of Hire	Screen 1	Hire (HI) created by *Enter New Hire* function
Position *Position Title* *Job Code 1* *Seniority Date* *EEO Category* *EEO-4 Function* *Union*	Screen 2 You cannot manually update the *Position* field.	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Status *Previous Status* *Status Chg Date*	Screen 2	Hire (HI) Status Change (ST) Rehire (RH) Termination (TE)
PE Benefit Group	Screen 2	Hire (HI) initially; maintained through Benefits Administration
Next Review *Next Review Date*	Screen 2	Hire (HI) Performance Review (RE)

Field Name	Location in Basic Data Record	Related Personnel Action(s)
Training Group if Infinium TR is installed	Screen 2	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Hire Source	Screen 3	Hire (HI)
Security Group, if associated with job controls	Screen 3	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Workers Comp. if associated with position controls	Screen 3	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Labor Category if associated with position controls	Screen 3	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Regular Hours *Scheduled Pay Pds*	Screen 4	Hire (HI) Salary Change (SC) Rehire (RH) Status Change (ST)
Base Rate *Base Frequency* *Pay Frequency*	Screen 4	Hire (HI) Salary Change (SC) Rehire (RH)
Pay Type	Screen 4	Hire (HI) Salary Change (SC)
Pay Grade if associated with job control	Screen 4	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)

Field Name	Location in Basic Data Record	Related Personnel Action(s)
Pay Grade Date *Step* *Step Date* *Next Step* *Next Step Date* *Freeze Step* *Step Override?*	Screen 4 You cannot manually update the Pay Grade or Step, Step Date.	Hire (HI) initially; maintained through the *Mass Update Employee Steps* function
Last Increase *Increase Reason* *Last Increase %* *Last Increase Amt* *Previous Rate*	Screen 4	Salary Change (SC)
Salary Range *Salary Quartile* *Comp Ratio*	Screen 4 You cannot manually update the Salary Range, Salary Quartile or Comp Ratio fields.	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH)
Salary Quartile *Comp Ratio*	Screen 4 You cannot manually update the Salary Quartile or Comp Ratio fields.	Hire (HI) Transfer (TR) Promotion (PR) Demotion (DM) Rehire (RH) Salary Change (SC)
Leave *Length of Break* *Leave Date* *Date of Return* *Layoff?* *FMLA Start Year* *FMLA Leave?*	Screen 5	Status Change (ST)
Termination *Termination Date* *Rehire* *Keep Permanently?*	Screen 5	Termination (TE)
Rehire Date	Screen 5	Rehire (RH)

Accessing Basic Data Information

You can access the employee's Basic Data screen in two ways:

Use the *Update Basic Data* function on the Infinium HR main menu to directly access the Basic Data screens.

Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing nine options, from which you can select the option(s) you want to access, including basic data.

The system presents you with the same five screens of information, regardless of which way you access the basic data record.

Using the *Update Basic Data* Function

You use the *Update Basic Data* function to directly access the employee's basic data information. Follow these steps to access the *Update Basic Data* function:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data*.
3. Select *Update Basic Data* [UEB]. The system displays the screen shown in Figure 8-1.

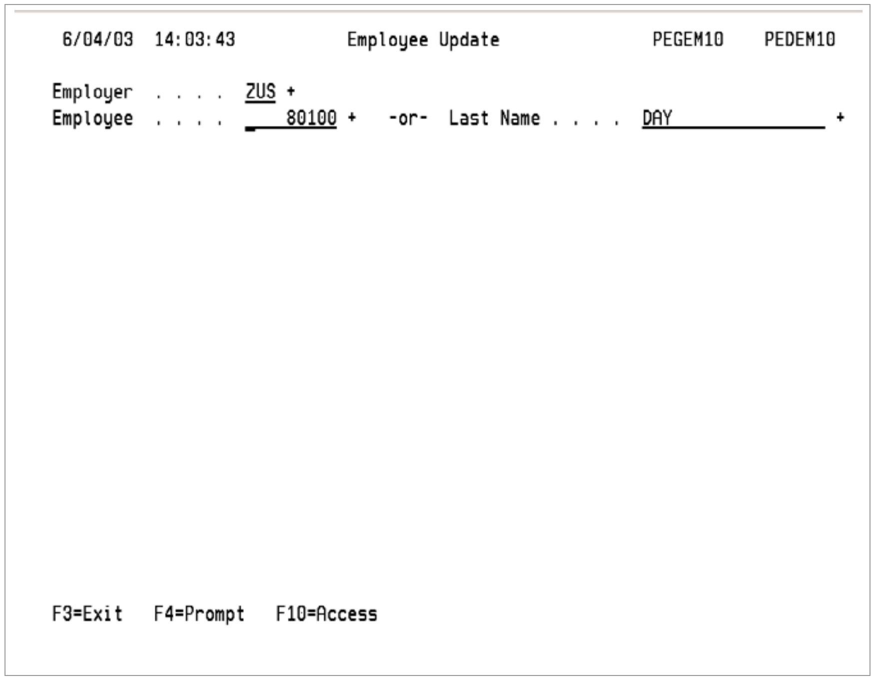


Figure 8-1: Employee Update prompt screen

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose information you want to view or update.

Employer

Type the code that represents the employer into which you hired the new employee.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or the entire last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and

automatically fills in the employee number and last name of the employee you selected.

See the “Displaying Employee Data” chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee’s name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee’s entire last name, type as much as you know and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5. After you fill in the employee number, press Enter. The system displays the first screen of the employee’s basic data record.

Using the *Update Employee Data* Function

You use the *Update Employee Data* function to display a selection screen from which you can access nine different categories of employee information including the employee’s basic data. This option provides you with a convenient and efficient way to access multiple types of information for a selected employee.

Follow these steps to access the *Update Employee Data* function:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data*.
3. Select *Update Employee Data* [UE]. The system displays the screen shown in Figure 8-2.

```
 8/09/02  13:07:31            Employee Update             PEGMZZ     PEDMZZ

Employer  . . . .  ZUS +  SAMPLE US COMPANY
Employee  . . . .      80100 +  -or-   Last Name . . . .  DAY                  +

















F3=Exit   F4=Prompt   F6=Add   F10=Access
```

Figure 8-2: Employee Update prompt screen 1 of 2

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose information you want to view or update.

Employer

Type the code that represents the employer into which you hired the new employee.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or the entire last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and

automatically fills in the employee number and last name of the employee you selected.

See the “Displaying Employee Data” chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee’s name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee’s entire last name, type as much as you know and press F4. The system displays employees whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5 After you fill in the employee number, press Enter. The system displays the screen shown in Figure 8-3.

```
 8/09/02  13:15:51           Employee Update            PEGMZZ     PEDMZZ

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80100   SUNNY DAY
Address . . . . :  7765 SOLEIL STREET
City/Town . . . :  SUN CITY
State/Province  :  AZ                Postal Code . . :  80111

Area        . . :  100     WESTERN AREA
Division    . . :  ADMIN   ADMINISTRATION
Department  . . :  ACCT    ACCOUNTING
Cost Centr  . . :  104     PAYROLL
                 Opt           Available options
                  X     Basic Data
                  _     PTO Accrual Data
                  _     Personnel Data
                  _     Education Data - Formal
                  _     Education Data - O.J.T.
                  _     Prev employment history
                  _     Property In Possession
                  _     Dependent Data
                  _     Automobile Data                                 +
F3=Exit   F10=Access
```

Figure 8-3: Employee Update prompt screen

6 Use the following information to fill in the fields on this screen:

The system displays information at the top of the screen that defaults from the employee’s basic data record and a menu of options.

Opt

You use the menu on this prompt screen to access up to nine categories of employee information. The first eight topics are visible in the above screen print. When you press PgDn, the screen scrolls and displays the *Employee Log, Enter Hire Transaction*, and *User Defined Data* options.

To select an option, type any character in the *Opt* field next to the option. Then press Enter. The system displays the specified option. You can select more than one option from this menu; the system displays the options in the order shown on the prompt screen.

Updating Employee Basic Data

This section provides you with detail on each field contained in the six screens of the employee basic data record. Follow the directions in the preceding section for the *Update Basic Data* or *Update Employee Data* functions to access the basic data record.

1 If you used the *Update Employee Data* function, select the *Basic Data* option from the Update Employee Data prompt screen and press Enter. The system displays Update Employee Basic Data screen 1 (Personal Information) similar to Figure 8-4.

If you used the *Update Basic Data* function, the system displays Update Employee Basic Data screen 1 (Personal Information) similar to Figure 8-4.

```
 7/22/04  15:25:22      Update Employee Basic Data        PRGMMS     PRDMMS
Employer  . . . :  ZUS  SAMPLE US COMPANY                       Page  1 of  5
Employee  . . . :      80005
                          Personal Information
Last Name . . . .  ACCURATE             Suffix  . . . . .  
First Name  . . .  ALAN                 Common Name . . .  INACCURATE
Middle Initial  .  N                    Middle Name . . .  
Birth Name  . . .  MALE CHILD           Name Title  . . .  
Address . . . . .  1500 CAPE WAY LANE, APT. 120
(Line 2)  . . . .  TEST OF PRINT OF W-2 FORMS
City/Town . . . .  HYANNIS
State/Province  .  MA  +                County  . . . . .  RIVER +
Postal Code . . .  05803                User Field 1  . .  _     +
Country . . . . .  USA +                User Field 3  . .            +
Foreign Post Code  
Foreign St/Prov .  
Home Tel. No. . .  508-555-1213         Date of Birth . .   6121965
Tax ID  . . . . .  083-44-1266          Date of Hire  . .   6011994
Sex . . . . . . .  M                    Adjusted D.O.H. .  
Location  . . . .  HQ
Area        . . :  100                  Department   . . : HR
Division    . . :  ADMIN                Cost Centr   . . : 112
F3=Exit   F4=Prompt   F10=Access   F12=Previous   F16=Update/End   F22=Delete
```

Figure 8-4: Update Employee Basic Data screen 1

Update Employee Basic Data Screen (Personal Information)

2 Use the following information to fill in the fields on this screen:

The system automatically fills in many of the fields on this screen when you hire a new employee using the *Enter New Hire* function or the *Update Employee Data* function. The field descriptions that follow assume that you completed all of the fields available to you during the *Enter New Hire* function. Required fields on each screen are listed below along with fields that are not included in the *Enter New Hire* function.

Some fields on this screen are automatically maintained through the *Enter Personnel Actions* function. You use Personnel Actions to create historical information for employees. The preceding table provides a quick reference to the fields you update using Personnel Actions. See the “Entering Personnel Actions” chapter for details.

The information below is based on the assumption that you use Personnel Actions to maintain employee information and that you typed **1** in the *Positions Used?* field on the employer control record.

Fields are generally discussed in cursor flow order although there are some exceptions to this rule to allow grouping of fields that are logically related to each other.

You must type information into the following fields during the *Enter New Hire* transaction. These fields should automatically be filled in when you review the basic data record of a newly hired employee:

- *Last Name*
- *First Name*
- *Address (line 1)*
- *City/Town*
- *State/Province*
- *Date of birth*
- *Tax ID*
- *Date of Hire*
- *Sex*

You can type additional information into the newly hired employee’s record using the *Update Employee Basic Data* function or make corrections to mistakes typed during the *Enter New Hire* function. Use the information below to determine whether to type directly on the basic data record or use the *Enter Personnel Actions* function to create historical information for the employee.

The only field on this screen that is not included in the *Enter New Hire* function is the *Adjusted D.O.H.* field.

Personal Information

The first screen of the employee basic data record contains personal information such as the employee's name, home address and telephone number, tax identification number and so on.

Last Name

This field displays the last name of the employee. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

Unless you type information in the *Check Name* field in the *Update Employee Payroll Data* function, the system uses the *Last Name, First Name* and *Middle Name* fields here for payroll processing, including check printing and generation of year-end tax forms and slips such as the W-2, 1099R, T4 and RL-1.

Suffix

Type the employee's suffix, such as JR, SR, II, III, and so on. This field is currently used only for W-2 processing. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

First Name

The system displays the first name of the employee. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

Common Name

You can use this field to type a preferred name or a nickname if it is different from the employee's first name. If you leave this field blank, the system automatically fills it with the same information you type in the *First Name* field. You can locate the employee using the *Common Name* field; see the "Using Employee Locate" section of the "Displaying Employee Information" chapter.

Middle Initial

The system displays the middle initial of the employee. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

For US employees, to include the employee's middle initial or middle name on the W-2 form, type the appropriate value in the *Middle Name* field.

Middle Name

You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

Type the employee's middle name, if applicable.

For US employees, this field is used for W-2 processing. If the employee's middle name is longer than the space allowed on the W-2 form, the system uses the first initial of the middle name.

Birth Name

Type the employee's birth name.

Name Title

Type the employee's title, such as **MR.**, **MRS.**, **MS.**, and so on. This field is not currently used in any processing; it is for informational purposes only. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

Address

The system displays the first line of the employee's street address. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

Unless you type information in the *Check Address* fields in the *Update Employee Payroll Data* function, the system uses the *Address, (Line 2), City/Town, State/Province* and *Postal Code* fields here for payroll processing, including check printing and generation of year-end tax forms and slips such as the W-2, 1099R, T4 and RL-1.

(Line 2)

The system displays the second line of the employee's street address. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

City/Town

The system displays the city in which the employee resides. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

State/Province

The system displays the code value that represents the state or province in which the employee resides. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

You define code values for this field using code type **STA**.

County

The system displays the code value that represents the county in which the employee resides. You define code values for this field using code type **CNT**.

Foreign St Prov

Specify the employee's foreign state or province, if applicable. You can only enter a value in this field if you entered a value for a foreign country in the *Country* field. If **US** (United States), **USA** (United States), **GU** (Guam), PR (Puerto Rico), **VI** (Virgin Islands), **AS** (American Samoa), **MP** (Northern Marianas) **AE**, or **AP** is entered in the *Country* field, you cannot enter a foreign postal code here. If the *Country* field is blank, the system uses **US** as the country.

This field is currently used only in W-2 processing.

Postal Code

The system displays the postal code or ZIP code of the employee. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

Use the *Reqr Postal Code?* field in the *Update Employer Controls* function to require users to enter a postal code when using the new hire process, updating basic data, or working with Personal Change transactions in the *Enter Personnel Actions* function.

User Field 1

Type a value for use with custom programming. This value is associated with employer code type U11.

Country

The system displays the code value that represents the country in which the employee resides. You define code values for this field using code type **CTR**.

User Field 3

Type a value for use with custom programming. This value is associated with employer code type U12.

Foreign Post Code

Specify the employee's foreign postal code. You can only enter a foreign postal code if you also entered a value in for a foreign country in the *Country* field. If **US** (United States), **USA** (United States), **GU** (Guam), **PR** (Puerto Rico), **VI** (Virgin Islands), **AS** (American Samoa), **MP** (Northern Marianas) **AE**, or **AP** is entered in the *Country* field, you cannot enter a foreign postal code here. If the *Country* field is blank, the system assumes that the US is the country.

This field is currently used only in W-2 processing.

Home Tel No

The system displays the employee’s home telephone number. You can update this field here or through the personal change transaction in the *Enter Personnel Actions* function.

This is a 19-character free-form field. You can include the area code or other international codes; if you do, you can use any character (such as parentheses or dashes) to separate the codes from the rest of the telephone number.

For example, you can type **508-555-1212** or **(508) 555-1212** for U.S. and Canadian telephone numbers. For international numbers you can type the number using the appropriate format for each country such as **011-44-333-444555** for telephone numbers in the United Kingdom.

Date of Birth

The system displays the employee’s date of birth using the appropriate date format for this employer.

You specify the date format for your employer when you create the employer control record. Refer to the *Infinium HR Guide to Controls* for additional information.

Tax ID

The system displays the Social Security Number or Social Insurance Number of the employee. You do not need to type separator characters (dashes) if you defined a default country of USA or Canada on the employer control record; the system automatically enters the dashes in this field when you press Enter on this screen. See the *Infinium HR Guide to Controls* for details on establishing the employer control record.

Date of Hire

The system displays the employee's original date of hire. You normally do not change this date.

Sex

This field identifies the gender of this employee. Valid values are:

M	Male
F	Female

Adjusted D.O.H.

Use this field to record the adjusted date of hire for an employee. For example, you can calculate an adjusted date of hire for a rehired employee and store it here. The system does not maintain this field.

The system can use the information in this field to calculate paid time off accruals and to determine benefits eligibility. See the *Infinium PY Guide to Processing* for details about paid time off accrual processing and the *Infinium HR Guide to Setup and Processing for Benefits Administration* for details about employee benefits administration.

Levels 1, 2, 3, 4

The system displays the codes representing the level(s) to which the employee is assigned in these fields. You can define up to four levels for each employer. The levels represent the employer's organizational structure and are hierarchical. For example, each level 2 code represents a sub-category of the Level 1 entity with which it is associated. The field descriptions that display on this screen default from the employer control record. See the *Infinium HR Guide to Controls* for details.

Level information defaults from the position to which the employee is assigned during the new hire process. Each employee must be assigned to at least a level 1 value; the employee can also be assigned to levels 2, 3 and 4 as appropriate.

You update the *Level* fields in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function. You cannot maintain the *Level* fields manually in the basic data record if you type **1** in the *Positions Used?* field on the employer control record.

Location

The system displays the code representing the work location to which the employee is assigned. You define code values for this field using code type **LOC**. The location code defaults from the position to which the employee is assigned. The employee is assigned to a position during the new hire process.

You update the *Location* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function. You cannot maintain the *Location* field manually in the basic data record if you type **1** in the *Positions Used?* field on the employer control record.

You can enter localized payroll information when updating employee information. To process localized payroll information you press F21 on the first Enter New Hire screen to display the Update Macau Name and Address screen..

For information about using the Update Macau Name and Address screen, see the "Defining Employee Information" chapter in the *Infinium HCM Guide to Localized Setup and Processing.*.

3 Press Enter to advance to the next screen in the basic data record. The system displays Update Employee Basic Data screen 2 (Job Related and Performance Information) similar to Figure 8-5.

```
 5/01/07  14:04:51      Update Employee Basic Data        PRGMMS     PRDMMS
Employer  . . . :  ZUS       SAMPLE US COMPANY                  Page  2 of  5
Employee  . . . :      80100 DAY,SUNNY D

                              Job Related Information
Position  . . . :  100250
Position Title  .  PAYROLL CLERK _____________  Officer of Company? .  _
Job Code 1  . . :  250                  Seniority Date  .  11012005
Job Code 2  . . .  _____ +              Seniority Date  .  ________
Job Code 3  . . .  _____ +              Seniority Date  .  ________
EEO Category  . :  2                    Status  . . . . .  FULL  +
Ethnicity/Race. .  1 +                  Previous Status .  PART  +
EEO-4 Function  .  __                   Status Chg Date .   7211999
Full Time ? . . .  1                    Union . . . . . :
Shift . . . . . .  _____ +              Union ID. . . . .  __________
PE Benefit Group.  *BENHRL-W +          Union Elig. Date.  ________
Sup. Employer . .  ZUS +                Sup. Name: DUDE,SURFER                +
                             Performance Information
Next Review . . .  PROB  +              Training Group  .  _____ +
Next Review Date.   2011996             Last Rating . . .  _____ +
Promotion . . . .  _____                Last Rating Score  ___.00

F3=Exit   F4=Prompt   F8=Add'l Pos   F10=Access   F12=Previous   F16=Update/End
```

Figure 8-5: Update Employee Basic Data screen 2

Update Employee Basic Data Screen 2 (Job Related/Performance Information)

4 Use the following information to fill in the fields on this screen:

Information for many of the fields on this screen defaults from the employee's assigned job or position control. See the table in the "Working with Basic Data" topic earlier in this part of the guide and the following field descriptions for details.

You must type information into the following fields during the enter new hire transaction. These fields should automatically be filled in when you review the basic data record of a newly hired employee:

- *Position*
- *Position Title*
- *Job Code 1*
- *Seniority Date (1st line)*
- *EEO Category*
- *Status*
- *Ethnic ID*

Depending on decisions made during your implementation of Infinium HR and your business needs, you may type information into additional fields on this screen that are available within the *Enter New Hire* function.

You cannot access the following fields when you use the *Enter New Hire* function. Depending on the field, you can view or type information in it using the Update Basic Data screens:

- *Seniority Date* (Lines 1, 2 and 3)
- *Previous Status*
- *Status Chg Date*
- *EEO-4 Function*
- *Full Time?*
- *Union*
- *Union ID*
- *Union Elig. Date*
- *Training Group*
- *Last Rating*
- *Last Rating Score*

- *Promotion*

Most of the fields listed above are automatically updated when you type personnel actions for the employee. Depending on how you defined the job and position controls associated with this employee, the system automatically fills in the *EEO Code*, *Union* and *Training Group* fields. See the table earlier in this part of the guide for details.

Job Related Information

This section of screen 2 of the employee basic data record displays the employee's current position assignment and related information that defaults from the employee's assigned position and job controls.

Position

The system displays the code representing the position to which the employee was assigned during the new hire process in this field.

You update the *Position* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function. You cannot maintain the *Position* field manually.

Position Title

The system displays the title associated with the position to which the employee is assigned. Information in this field normally defaults from the employee's assigned position; however, you can override it manually if necessary.

You update the *Position Title* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

Officer of Company?

Type the value that indicates whether the employee is an officer of the company, if required by your state for quarterly unemployment reporting.

Refer to the Infinium HR/PY AS/400 or iSeries Help Text for a list of valid values for states that use this field. For state-specific information on quarterly unemployment reporting, refer to the "State-specific Setup and Reporting" part of the *Infinium PY Guide to Federal and State Reporting*.

Caution: For Wyoming employers only, if you type **1**, **2**, **3**, **4** or **5** as the *Officer of Company?* value, do not specify a value in the *Workers Comp* field on the Update Employee Basic Data screen 3.

Job Code 1

The system displays the code representing the job associated with the position to which the employee is assigned during the new hire process.

You update the *Job Code 1* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

Seniority Date (1st line)

The system displays the date the employee was assigned to the job specified in the *Job Code 1* field. For new employees, the seniority date is the same as the employee's hire date.

You update the first *Seniority Date* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

Job Code 2

The system displays the code representing the second job associated with an employee. This field is for informational purposes only. Press F4 to display a list of valid job codes.

Seniority Date (2nd Line)

The system displays the second seniority date associated with an employee. This field is for informational purposes only.

Job Code 3

The system displays the code representing the third job associated with an employee. This field is for informational purposes only. Press F4 to display a list of valid job codes.

Seniority Date (3rd Line)

The system displays the third seniority date associated with an employee. This field is for informational purposes only.

EEO Category

The system displays the code value representing the Equal Employment Opportunity code associated with this employee. This code value defaults from the job control record to which the employee is assigned. You cannot type in this field. You define code values for this field using code type **EEO**.

Status

The system displays the code value representing the employee's current employment status. You define code values for this field using code type **STS**. You use the status change transaction in the *Enter Personnel Actions* function to change this code value and retain the prior code in the employee's history.

Previous Status

The system displays the employee's prior status code. This field is automatically updated by the system when you use the status change, termination or rehire transactions in the *Enter Personnel Actions* function and specify a code value in the *Status* field on the status change, termination or rehire transaction screens that is different from the employee's current status code value.

Status Chg Date

The system displays the effective date of the employee's current status code value. This date is associated with the status code value in the *Status* field. The system uses the effective date you enter in the status change, termination or rehire transactions in the *Enter Personnel Actions* function to update this field.

Ethnicity/Race

The system displays the code value representing the ethnic category assigned to this employee. You define code values for this field using code type **ETH**.

EEO-4 Function

If applicable, the system displays the code assigned to this employee for EEO-4 state and local data reporting. This code defaults from the *EEO-4 Function* field on the job control to which the employee is assigned. You use this field only for employees of state or local municipalities in the United States, such as employees of the city of Santa Fe.

Full Time?

The system displays a value that indicates whether the employee should be included as a full-time or part-time employee on the EEO-4 state and local data report. You use this field only for employees of state or local municipalities in the United States. Valid values for this field are:

1	Full-time employee

0	Non-full-time employee (includes part-time, temporary and seasonal employees)

Union

If applicable, the system displays the code value representing the union of which the employee is a member. This code value defaults from the position control to which the employee is assigned. You cannot type in this field.

You update or remove information from the *Union* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

Union ID

You can use this field to track the membership number assigned to this employee by the union or to track the union's local identification number.

Union Elig. Date

Type the date the employee became eligible to join the union or the date the employee officially became a union member.

Shift

The system displays the code value representing the shift to which this employee is assigned as a default. Infinium PY uses this code during pay cycle processing to calculate shift premiums for the employee. This code can default from the employee's level or position assignment. Press F4 to display list of valid codes.

PE Benefit Group

The system displays the code representing the group of benefit plans for which the employee is eligible. You define benefit plans and associate them with PE Benefit Groups using the *Infinium Benefits Administration* function. See the *Infinium HR Guide to Setup and Processing for Benefits Administration* for more information.

This code can default from the employee's initial position assignment during the new hire transaction. Press F4 to display a list of valid codes. Thereafter you maintain this field using the *Update Employee Enrollments* function within Infinium Benefits Administration.

Performance Information

This section of screen 2 of the employee basic data information displays information about the employee's supervisor and most recent and next scheduled performance review.

Sup. Employer

Type the code value that identifies the employer of the employee's supervisor.

Sup. Name

Press F4 to display a list of valid supervisor names.

Next Review

The system displays the code value representing the next type of performance review the employee will receive. During the new hire transaction, this code can default from the *Next Review* field associated with the employee's initial job assignment. You update this field using the performance review transaction in the *Enter Personnel Actions* function.

You define code values for this field using code type **RTP**. Press F4 to display a list of valid values.

Next Review Date

The system displays the date on which the employee is scheduled to receive his or her performance review. During the new hire transaction, the system can fill this date automatically based on the *Next Review Days* field associated with the employee's initial job assignment. You update this field using the performance review transaction in the *Enter Personnel Actions* function.

Promotion

You can use this field to track the promotability of the employee. This is a 5-character free-form field that does not require pre-defined values. You can update this field using the *Promotion* field on the performance review transaction within the *Enter Personnel Actions* function.

Last Rating

The system displays the code value representing the employee's most recent performance evaluation rating in this field. You update this field using the *Rating* field on the performance review transaction within the *Enter Personnel Actions* function.

You define code values for this field using code type **RAT**. Press F4 to display a list of valid values.

Last Rating Score

The system displays the numeric score representing the employee's performance evaluation rating. You update this field using the *Rating Score* field on the performance review transaction within the *Enter Personnel Actions* function.

Training Group

The system displays the code representing the group of training courses to which this employee should be assigned. You define training courses and associate them with training groups using the Infinium TR system. See the *Guide to Infinium Training* for more information. Press F4 to display a list of valid codes.

This code can default from the employee's position assignment. If you associate training groups with position controls, you can update the *Training Group* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

5 Press Enter to advance to the next screen of the basic data record. The system displays Update Employee Basic Data screen 3 (Contact and Miscellaneous Information) similar to Figure 8-6.

```
11/13/08  07:59:49      Update Employee Basic Data         PRGMMS     PRDMMS
Employer  . . . :  ZUS       SAMPLE US COMPANY                  Page  3 of  5
Employee  . . . :      80005 ACCURATE,ALAN

                        Contact Information
Office Tel. No. .  555-1212
Misc Phone #1 . .  5866151
Misc Phone #2 . .  98313556
Misc Phone #3 . .
Email Address # 1
EILEEN.WOOD@INFOR.COM
Email Address # 2

URL Address # 1 .
                        Miscellaneous Information
Class . . . . . .  EXEC  +            Hire Source  . . . AGNCY +
Mail Group  . . .        +            Work Permit Date .  1011985
Security Group  .  EXEC  +            Workers Comp . . . 4610  +
Education . . . .  TRADE +            Workers Comp ID  .
Pref. Language  .  SAM   +            Safety Category  . _
Labor Category  .  OFF   +            Operation  . . . .
XM User?. . . . .  0 (0, 1, 2)
F3=Exit  F4=Prompt   F9=User Groups  F10=Access  F12=Previous  F16=Update/End
```

Figure 8-6: Update Employee Basic Data screen 3

Update Employee Basic Data Screen 3 (Contact and Miscellaneous Information)

6 Use the following information to fill in the fields on this screen:

There are no required fields on this screen. Some of these fields are included on screen 4 of the *Enter New Hire* function; however, none of them is required.

You cannot access the following fields through the *Enter New Hire* function:

- *Class*
- *Mail Group*
- *Work Permit Date*
- *Workers Comp.*
- *Workers Comp ID*
- *Education*
- *Pref. Language*
- *Safety Category*
- *Labor Category*
- *Operation*

Depending on how you defined the job and position controls associated with this employee, the system automatically fills in the W*orkers Comp., Security Group* and *Labor Category* fields. See the table earlier in this part of the guide for details.

Contact Information

Use the following information to process the fields in the Contact Information section of this screen:

Office Tel. No.

Type the employee's telephone extension or complete office telephone number including area code. The system can use this information to generate telephone directories.

Misc Phone #1, #2, #3

Type any other telephone numbers where this employee can be reached, such as the employee's cellular phone number. Examples: **617-555-9999** for number in Boston, Massachusetts, **011-44-204-999999** for an international number in Dorset, England.

Email Address #1 and *#2*

Type one or two e-mail addresses where this employee can be reached such as John_Smith@XXX.com.

URL Address #1

Type the URL (Uniform Resource Locator) associated with this employee, if any, such as www.XXXCorp.com.

Miscellaneous Information

This section of screen 3 of the employee basic data record contains thirteen optional fields. You can enter information into some of the fields during the *Enter New Hire* function as described below. You use the *Update Employee Basic Data* function to enter information directly into the other fields in this section.

Class

The system displays the code value representing the class to which the employee has been assigned. You define values for this field using code type **CLA**. The system does not use this field for any processing functions. You can use this field to best satisfy your own business and reporting requirements.

Hire Source

The system displays the code value that represents the recruitment source of this employee. You define code values for this field using code type **HIR**. The value in this field can default from the *Appl. Source* field in the employee's Applicant Record or from the *Hire Source* field in the *Enter New Hire* function.

Mail Group

Type the code value that represents the mail stop or mail group for this employee. You define code values for this field using code type **MAI**.

Work Permit Date

You can use this field to record the date that the employee obtained his or her work permit or the date that the work permit will expire. The system does not use this field for any updates or reports; therefore, you can make your own decision on how to use this field to best fit your business needs. You should ensure that all Infinium HR users enter consistent information in this field.

Security Group

If applicable, the system displays the code value representing the security group with which the employee is associated. This is an optional field. This value can default from the job to which the employee is assigned or you can enter it during the *Enter New Hire* function. You define code values for this field using code type **SEC**.

Your system administrator can utilize an Infinium HR security function to restrict selected users from updating, displaying or printing information of employees assigned to a specified security group.

Workers Comp.

Specify the employee's worker's compensation category code value, if applicable.

If you use positions, leave blank to use a default value from the position control to which you assign the employee during the hire process.

Use code type **WCC** within the *Update Employer Codes* function to define code values for this field.

Caution: For Wyoming employers only, do not specify a value for this field if you type **1**, **2**, **3** **4** or **5** in the *Officer or Company?* field on the Update Employee Basic Data screen 2.

Workers Comp ID

Use this field to further identify the workers' compensation category or case number associated with this employee. This is an 11-character free-form field that does not require pre-defined values.

Education

Type the code value representing the highest educational level attained by the employee. You define code values for this field using code type **EDU**. You can use the *Update Education Data* function to type additional education information for the employee.

Pref. Language

Type the code value that represents the language preferred by the employee. You define code values for this field using code type **LNG**.

Safety Category

If appropriate, type **A** to indicate that the employee works in an agricultural job. If the employee is not employed in farming work, leave this field blank.

The system uses this field for the OSHA reports generated from the *List Incident Data* and *List Incident Summary* functions.

Labor Category

In this field the system displays the code value representing the labor category to which this employee is assigned. This code value can default from the position control to which the employee is assigned. You define code values for this field using code type **LAB**.

XM User

Specify whether this employee is an Infor Expense Management Fast-Track for Infinium user. Valid values are:

0	This employee is not an Infor Expense Management Fast-Track for Infinium user.
1	This employee is an Infor Expense Management Fast-Track for Infinium user, but the employee's information is not imported into Infinium Payables Ledger.

2 This employee is an Infor Expense Management Fast-Track for Infinium user, and the employee's data is imported into Infinium Payables Ledger by the HCM Employee to PL Vendor process in Infor Expense Management Fast-Track for Infinium.

If you type **1** or **2** here, Infinium Payables Ledger uses this information to create this employee as a vendor in Payables Ledger.

The next time you run the HCM Employee to PL Vendor process the employee's data is not imported into Infinium Payables Ledger if the value in this field is **2**. To re-import this employee's data, change this value to **1** and rerun the HCM Employee to PL Vendor process. You must re-import the employee's data to Infinium Payables Ledger if you changed any of the following information after you last ran the HCM Employee to PL Vendor process:

- Employee basic data
- Supervisor data
- User groups
- Direct deposit data

Operation

Use this field to type any unique information you need to track within your organization. This is a 10-character free-form field that does not require pre-defined values.

7 Press Enter to advance to the next screen of the basic data record. The system displays Update Employee Basic Data screen 4 (Compensation Information) similar to Figure 8-7.

```
 8/27/04  14:08:36      Update Employee Basic Data         PRGMMS     PRDMMS
Employer  . . . :  ZUS    SAMPLE US COMPANY                        Page  4 of  5
Employee  . . . :      80005    ACCURATE,ALAN N

                          Compensation Information
Regular Hours . .  _35.00              Scheduled Pay Pds  26
Base Rate . . . .      180,000.0000    Pay Type  . . . .  S
Base Frequency  .  13                  Pay Frequency . .  B

Pay Grade . . . .  _____ +             Pay Grade Date  :
Step  . . . . . :   0                  Step Date . . . :
Next Step . . . :   0                  Next Step Date  :
Freeze Step?  . :  0 (0=No 1=Yes)      Step Override?. :  0 (0=No 1=Yes)

Last Increase . .   9092001            Increase Reason .  PROMO +
Last Increase % .  200.0000            Next Increase . .  ________
Last Increase Amt      120,000.0000    Previous Rate . .      60,000.0000

Salary Range  . :  100
Salary Quartile :  5
Comp Ratio  . . :  468.0000

F3=Exit   F4=Prompt   F10=Access   F12=Previous   F16=Update/End
```

Figure 8-7: Update Employee Basic Data screen 4

Update Employee Basic Data Screen 4 (Compensation Information)

8 Use the following information to fill in the fields on this screen:

You fill in most of the information on this screen when you use the *Enter New Hire* function. The exceptions are the fields relating to the employee’s salary increase, which the system updates automatically when you type a salary change transaction in the *Enter Personnel Actions* function.

Eight of the fields on this screen relate to employees whose pay rates and rate progression are determined by their assigned step within a pay grade. You associate pay grades with job controls and type **1** in the *Step-in-Grade?* field on the job control to indicate that you are using step-in-grade processing to automate the employee’s movement from one step to the next in the employee’s pay grade.

If you do not use step-in-grade processing for an employee, all but one of these fields are low-lighted and you cannot type information into them. See the parts entitled “Establishing Step-in-Grade Processing” and “Using Step-in-Grade Mass Update Functions” for details on how to set up and administer employees in pay grades.

You must type information in the following fields:

- *Regular Hours*

- *Scheduled Pay Pds*
- *Base Rate*
- *Base Frequency*
- *Pay Type*
- *Pay Frequency*

You cannot access the following fields when you use the *Enter New Hire* function:

- *Last Increase*
- *Increase Reason*
- *Last Increase %*
- *Next Increase*
- *Last Increase Amt*
- *Previous Rate*
- *Salary range*
- *Date Last Worked*
- *Salary Quartile*
- *Comp Ratio*

Depending on how you defined the job control associated with this employee, the system automatically fills the *Pay Type, Pay Grade, Step* and *Salary Range* fields. See the table early in this part of the guide for details.

Compensation Information

Your system administrator decides if you can display or update the compensation information on this screen. You generally do not manually update any of the fields on this screen. See the table early in this part of the guide for details on which personnel actions update these fields.

Regular Hours

The system displays the employee's normally scheduled hours per pay period. If you do not type the employee's annual salary in the *Base Rate* field and the value in the employee's *Pay Type* field is **H**, the system uses the information in the *Regular Hours* and *Scheduled Pay Pds* fields to compute the employee's annual base pay. This field is not used by Infinium PY for pay cycle processing or pay check generation.

Scheduled Pay Pds

The system displays the number of normally scheduled pay periods per year for the employee. If you do not type the employee's annual salary in the *Base Rate* field and the value in the employee's *Pay Type* field is **H**, the system uses the information in the *Regular Hours* and *Scheduled Pay Pds* fields to compute the employee's annual base pay. This field is not used by Infinium PY for pay cycle processing or pay check generation.

Base Rate

The system displays the base pay rate for the employee. The system uses the value in the *Base Frequency* field to interpret this rate. If you do not state the base rate on an annual basis and the employee's *Pay Type* is **H**, the system uses the *Regular Hours* and *Scheduled Pay Pds* fields to annualize this rate.

The annualized version of this rate is used by Infinium HR in compensation reports and the salary planning module; it is also used in Infinium BA to compute life insurance coverage amounts that are a multiple of base pay. Infinium PY does not use this rate to calculate pay for the employee during cycle processing.

Base Frequency

The system displays in this field the frequency of the rate in the *Base Rate* field. The system uses this frequency to interpret the base rate and annualize it if necessary.

Valid values are:

H	Hourly
D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
A	Annually
10	10 pay periods per year
13	13 pay periods per year

22	22 pay periods per year
27	27 pay periods per year
53	53 pay periods per year

Pay Type

The system displays a value in this field that indicates the way you state the employee's payroll rate(s) in his or her payroll data record. The system uses this field to compute the employee's payroll rate(s) when you type a salary change transaction in the *Enter Personnel Actions* function.

The system requires this field to properly update payroll rates because you can state the personnel base rate differently than the payroll rate. For example, you enter an annual rate of $25,000 for the employee in the *Base Rate* field on this screen. You can state the employee's payroll rate as an hourly equivalent amount, such as $12.02 per hour or as a salaried amount per pay period, such as $961.54 per biweekly pay period. When you enter a salary change transaction, the system uses the *Pay Type* field to correctly convert the employee's base rate to the equivalent payroll rate.

Payroll users can utilize this field to ensure that employees are assigned to the correct pay cycle. The system can compare this field to the *Pay Type* field on the cycle control record in Infinium PY to determine if the employee is assigned to the appropriate payroll cycle. Payroll users can define different pay cycles for hourly employees and salaried employees and use the *Pay Type* field as an edit to ensure that each employee is assigned to the correct payroll cycle.

The value in this field defaults from job control to which the employee is assigned.

Valid values for this field are:

H	Hourly employee with an hourly payroll rate(s)
N	Non-exempt employee with a salaried payroll rate(s)
S	Exempt employee with a salaried payroll rate(s)

You can assign the employee to a pay type that is not compatible with his or her payroll rate(s). However, if the *Pay Type* and payroll rates are not compatible, the system will not be able to automatically compute the employee's payroll rates when you type a salary change, nor will the *List Employee Base Pay Rates* report produce the correct results.

Pay Frequency

The system displays how often the employee is scheduled to be paid. The system can compare the information in this field to the *Pay Frequency* field on the cycle control record in Infinium PY to determine if the employee is assigned to the appropriate payroll cycle. This field does not guarantee that the employee will be paid in every scheduled pay period nor does it affect any payroll computations.

Valid values are:

H	Hourly
D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
A	Annually
10	10 pay periods per year
13	13 pay periods per year
22	22 pay periods per year
27	27 pay periods per year
53	53 pay periods per year

Pay Grade

The system displays the code indicating the pay grade to which the employee is assigned. If a pay grade is associated with the job control to which the employee is assigned, the pay grade defaults into this field during the *Enter New Hire* function. You can override the pay grade code during the new hire transaction if necessary. See the parts entitled “Establishing Step-in-Grade Processing” and “Using Step-in-Grade Mass Updates” for details on how to set up and administer employees in pay grades.

If you are using step-in-grade processing for an employee, you cannot update this field manually after the new hire transaction. This code defaults from the job control associated with the employee’s position assignment. You can update the *Pay Grade* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

If you are not using step-in-grade processing for an employee, you can type a value in this field at any time. You use the *Update Pay Grade and Steps* function to define values for this field.

In addition to the *Pay Grade* field, the seven fields that follow affect step-in-grade processing for the employee. If you do not use step-in-grade processing to maintain the employee's pay rates, all of these fields are low-lighted and you cannot type information in them. If you use step-in-grade processing for an employee, you can type in only five of the fields; you cannot type information in the *Pay Grade*, *Step* and *Step Date* fields.

Pay Grade Date

The system displays the date the employee was assigned to the pay grade shown in the adjacent field. This date is the same as the date of hire for new employees. If you use the promotion, demotion, transfer or rehire transactions in the *Enter Personnel Actions* function to move the employee to a new position associated with a new job and pay grade, this date is the same as the effective date of the personnel action.

Step

In this field the system displays the step within the specified pay grade to which the employee is currently assigned. The rate associated with this step defaults into the *Base Rate* field on this screen and can also update the payroll rate fields in the employee's payroll data screen. You cannot type information into this field. The *Mass Update Employee Steps* function automatically moves the employee from step to step within the assigned pay grade based on criteria you specify on the associated pay grade control record.

Step Date

The system displays the date the employee was assigned to the current step. You cannot type information into this field. The *Mass Update Employee Steps* function automatically moves the employee from step to step within the assigned pay grade and updates this date based on criteria you specify on the associated pay grade control record.

Next Step

The system displays the step to which the employee is scheduled to advance when the employee has worked the number of months and/or hours specified on the pay grade control record. If the employee's movement is based on only months of service, the system uses the date in the *Next Step Date* field during the *Mass Update Employee Steps* function to move the employee to the next step.

You can override this step by typing a different step number within the employee's pay grade into this field. After you press Enter or F16 to update this screen, the system automatically enters **1** in the *Step Override?* field on this screen.

Next Step Date

If the employee's movement to the next step is based entirely or in part on length of service, the system displays the date the employee is scheduled to advance to the next step. The system uses this date during the *Mass Update Employee Steps* function to move the employee to the next step.

You can override this date by typing a different date in this field. After you press Enter or F16 to update this screen, the system automatically fills in the *Step Override?* field on this screen with **1**.

Freeze Step?

The system displays a value that indicates whether the employee should advance from the step shown in the *Step* field during the *Mass Update Employee Steps* function. The value in this field is normally **0**. You can type **1** in this field to prevent the system from automatically moving the employee to the step specified in the *Next Step* field during the *Mass Update Employee Steps* function.

The system fills in this field with **1** during the *Mass Update Employee Steps* function if the employee has reached the top step defined for the employee's pay grade.

Step Override?

If you type information in the *Next Step* or *Next Step Date* fields that does not follow the standard step progression requirements defined on the pay grade control, the system enters **1** in this field. After you use the *Mass Update Employee Steps* function to advance the employee to the specified next step, the system changes the *Step Override?* field value to **0**.

If you override the *Next Step* or *Next Step Date* field values when you use the *Enter New Hire* function, the system sets the *Step Override?* field value on the Update Employee Basic Data screen to **0** to apply hours-worked requirements specified on the pay grade control, if applicable.

If the value in the *Step Override?* field is **1** when you execute the *Mass Update Employee Steps* function to process the employee's pay grade, the system performs one of the following actions:

- If the pay grade control contains both hours-worked and months-worked requirements, the system ignores the hours-worked requirements and advances the employee to the next step based on the value in the *Next Step Date* field.
- If the pay grade control contains hours-worked requirements only, the system leaves the employee's *Next Step Date* field blank and advances the employee to the next step.

Last Increase

The system displays the effective date of the most recent salary change transaction you entered for this employee in the *Enter Personnel Actions* function.

Increase Reason

The system displays the code value indicating the reason for the employee's most recent salary change transaction in this field. For step-in-grade employees, this field displays the salary change reason code value specified for the *Mass Update Employee Steps* function that produced his or her most recent step movement. You define code values for this field using code type **SAL**.

Last Increase %

The system displays the percent of increase or decrease given to this employee in his or her most recent salary change transaction within the *Enter Personnel Actions* function. For step-in-grade employees, this field displays the percentage of increase or decrease associated with the employee's most recent step movement produced by the *Mass Update Employee Steps* function.

Next Increase

Type a date in this field that indicates when the employee is next scheduled for a salary change. The system does not update or maintain this field at this time.

Last Increase Amt

This field displays the dollar amount of the increase or decrease given to the employee in his or her most recent salary change transaction within the *Enter Personnel Actions* function. For step-in-grade employees, this field displays the dollar amount of the increase or decrease associated with the employee's most recent step movement produced by the *Mass Update Employee Steps* function.

Previous Rate

The system displays the employee's base rate prior to his or her most recent salary change transaction. For step-in-grade employees, this field displays the pay rate associated the employee's prior step.

Salary Range

The system displays the salary range that corresponds to the job control that is associated with the position to which the employee is assigned. You cannot type in this field. You update the *Salary Range* field in the basic data record by changing the employee's position assignment using the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function.

If you enter a new value in the *Salary Range* field on the job control record, the system automatically updates the *Salary Range* field in the basic data records of employees assigned to positions associated with the updated job control.

Salary Quartile

The information in this field indicates the quarter of the salary range that contains the employee's base rate. You can manually define quartiles for salary ranges or let the system divide each salary range into quarters. When you hire an employee, you assign him or her to a position; each position is associated with a salary range. The system compares each employee's base rate to the quartiles of his or her salary range and assigns him or her to the quartile that includes his or her base rate.

For example, the employee is assigned to Salary Range 001. You use the *Update Salary Ranges* function to define the minimum of the range as $8.00 per hour, the midpoint as $10.00 per hour and the maximum as $12.00 per hour. You let the system calculate the quartiles; therefore, the system automatically divides the range into the quarters as shown below:

1st quartile:	$ 8.00 - 8.99
2nd quartile	9.00 - 9.99
3rd quartile	10.00 - 10.99
4th quartile	11.00 - 12.00

The system also automatically defines a quartile **0** for any rates that fall below the minimum of the salary range, in this case $8.00 per hour. It also defines a quartile **5** to identify any rates greater than the maximum of the salary range, in this example $12.00 per hour.

If the employee's base rate is $8.50, the system displays **1** in the employee's *Salary Quartile* field to indicate that his or her base rate is within the first quartile of his or her salary range. If the employee's base rate is $12.50, the system displays **5** in the employee's *Salary Quartile* field to indicate that his or her base rate is above the maximum of the salary range associated with the employee's job control.

If you update the rates associated with the *Minimum, Quartile 2, Midpoint, Quartile 4* or *Maximum* fields defined for a salary range, the system automatically updates the *Salary Quartile* field in the basic data records of employees assigned to positions with job controls associated with the changed salary range. You cannot type in this field.

Comp Ratio

The information in this field represents a ratio that compares the employee's base rate to the midpoint of his or her assigned salary range. For example, if the employee's base rate is $12.00 and the midpoint of his or her salary range is $10.00, the system divides 12 by 10 to compute a comp ratio of 120%.

If you update the rate associated with the *Midpoint* field on the employee's assigned salary range, you must use the *Update Salary Ranges* or *Mass Change Salary Ranges* function to update the employee's *Comp Ratio* field. You cannot type in this field. See the part on "Defining Salary Ranges" in the *Infinium Human Resources Guide to Controls* for details.

Clock Number

You can use this field to record the employee's time clock number or any other number associated with the employee. The system does not maintain or use this field.

9 Press Enter to advance to the next screen of the basic data record. The system displays Update Employee Basic Data Screen 5 (Break in Service Information) similar to Figure 8-8.

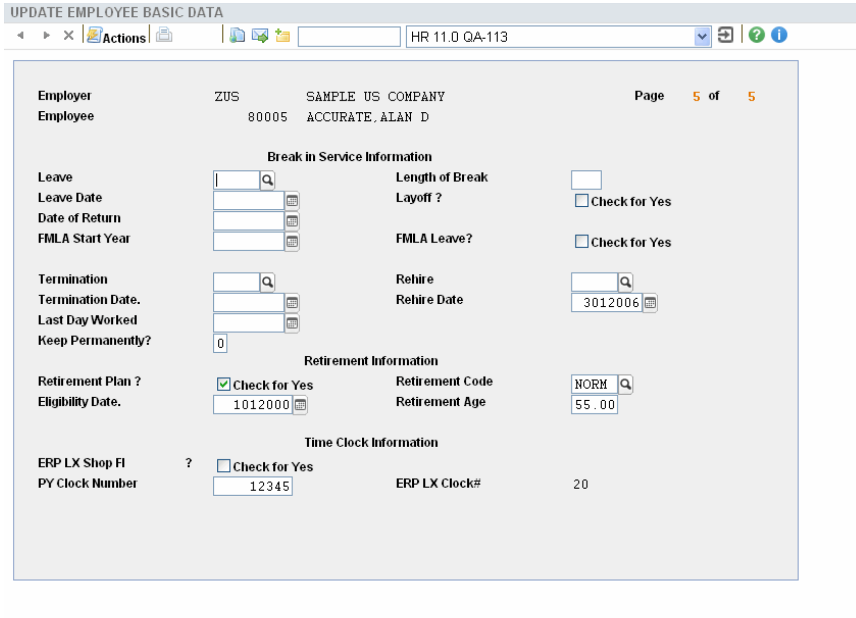


Figure 8-8: Update Employee Basic Data screen 5

Update Employee Basic Data Screen 5 (Break in Service Information, Retirement Information, Time Clock Information)

10 Use the following information to fill in or interpret the fields on this screen:

You use the *Enter Personnel Actions* function to maintain most of the fields on this screen. When you enter a personnel action, the system automatically updates information on this screen and creates a historical record of the transaction for the employee. See the table beginning on page 4 for an overview.

You should manually enter information into only the four fields listed below:

- *Retirement Plan?*
- *Retirement Code*
- *Eligibility Date*
- *Retirement Age*
- *ERP LX Shop Fl*

Break in Service Information: Status Change Data

You use the status change transaction in the *Enter Personnel Actions* function to update the following five fields with information about employees on a leave of absence or layoff.

Leave

For employees on a layoff or leave of absence, the system displays the code value associated with the employee's current leave or layoff. You define code values for this field using code type **LVC**.

Length of Break

The system displays the anticipated length of the employee's absence from work. This is a 3-character free-form field that does not require pre-defined values.

Leave Date

The system displays the date the employee was laid off or went out on a leave of absence.

Date of Return

The system displays the date the employee is expected to return from leave of absence or layoff.

FMLA Start Year

The system uses this date as the basis for the employee's annual eligibility for FMLA leave. Depending upon the value in the *FMLA Leave Year* field on the Employer Update screen, the employee's eligibility is based on the first FMLA leave date, the employee's date of hire, or adjusted date of hire. If the value in the *FMLA Leave Year* field is:

- **4**, year is based on the first time the employee took FMLA leave, the date in this field is the date of the employee's first FMLA leave.
- **2**, year is based on employee's date of hire, the system bases FMLA leave on the date of hire, and this field is blank. You can enter a date here to use a date that is different from the employee's date of hire.
- **3**, year based on adjusted date of hire, the system bases FMLA leave on the adjusted date of hire, and this field is blank. You can enter a date here to use a date that is different from the employee's adjusted date of hire.
- **1** or **5**, leave this field blank.

FMLA Leave

Specify yes if the employee is currently on an FMLA leave. Specify no if the leave is not related to the FMLA leave.

Layoff?

The system displays a value that indicates if the employee is on a leave of absence or has been laid off by the employer.

Valid values are:

1	The employee has been laid off.
0	The employee has not been laid off.

Break in Service Information: Termination Data

You use the termination transaction in the *Enter Personnel Actions* function to update the following three fields for terminated employees. The system uses the *Termination Date* field to determine if an employee is active or terminated when you produce standard Infinium HR reports.

Termination

For terminated employees, the system displays the code value that represents the reason why the employee left this employer in this field. You define code values for this field using code type **TRM.**

Termination Date

The system displays the date the employee ended his employment with the specified employer.

Rehire

The system displays the code value that indicates whether the employee is eligible to be rehired by this employer. You define code values for this field using code type **REC**.

Last Day Worked

This is the last day this employee worked before termination or inter-company transfer. If you enter the system date or a date prior to the system date in the *Last Day Worked* field on the Personnel Actions Update screen for a termination or inter-company transfer, the system updates this field immediately. If you enter a future date in the *Last Day Worked* field on the Personnel Actions Update screen for a termination or inter-company transfer, the system updates this field when you use the *Mass Update PE Actions* function.

Keep Permanently?

The system displays a value that indicates if the employee's record will be purged when the *Purge Terminated Employees* function is used.

Valid values are:

1	The system does not remove this employee's records when the *Purge Terminated Employees* function is run, regardless of whether the employee is active or terminated.
0	If this employee is terminated, the system removes all of his or her records when you use the *Purge Terminated Employees* function.

Break in Service Information: Rehire Data

You use the rehire transaction in the *Enter Personnel Actions* function to update the following field. The rehire transaction removes information from all of the fields associated with the termination transaction as described above.

Rehire Date

The system displays the date the employee was rehired by this employer.

Retirement Information

You maintain the following fields manually. These fields are for your own reporting and analysis. They are not used by the *Benefits Administration* function within Infinium HR and they are not used by Infinium PY for W-2 processing.

Retirement Plan?

You use this field to indicate if the employee is eligible for or participates in a retirement plan.

Valid values are:

1	The employee is eligible for or participates in a retirement plan.
0	The employee is not eligible for or does not participate in a retirement plan.

If you type **1** in this field, you must also type information in the *Retirement Code* and *Eligibility Date* fields.

Retirement Code

Type the code value that identifies the type of retirement plan the employee participates in or the type of retirement plan distribution the employee will receive. You define code values for this field using code type **BEN**.

Eligibility Date

Type the date the employee is eligible to participate in the company's retirement plan or the date the employee is eligible to retire.

Retirement Age

Type the retirement age applicable to this employee or the age at which the employee retired. The system uses this field when you generate the *List Projected Retirement* report within the *Benefits Administration* function.

Time Clock Information

ERP LX Shop Fl

Specify whether this employee is an Infor ERP $_{LX}$ shop floor employee. Valid values are:

0	This employee is not an Infor ERP $_{LX}$ shop floor employee.
1	This employee is an Infor ERP $_{LX}$ shop floor employee.

If you type **1** in this field, the system generates a clock number for the employee if a clock number is not already assigned to the employee. If the value in the *Shop Floor Clock# Used* field on the entity control is **P**, the clock number is generated in the *PY Clock Number* field.

If the value in the *Shop Floor Clock# Used* field on the entity control is **S**, the clock number is generated in the *ERP LX Clock#* field.

PY Clock Number

If the value in the *Shop Floor Clock# Used* field on the entity control is **P**, this is the employee's clock number.

ERP LX Clock#

If the value in the *Shop Floor Clock# Used* field on the entity control is **S**, this is the employee's clock number.

11 Press Enter.

The system exits this employee's basic data record and displays the Update Basic Data prompt screen or the Update Employee Data selection screen, depending on the function you used to access this employee's basic data. At the selection screen, you can select additional information for this employee or press F3 to return to the prompt screen.

If you selected additional types of information when you selected basic data at the Update Employee Data selection screen, the system continues to the next type of information and returns you to the selection list only after displaying the last selected type.

12 At the prompt screen, you can repeat the procedure for a different employee or press F3 to exit to the Infinium HR or menu.

Update Paid Time Off Accrual Information

When you use the *Enter New Hire* function to enter an employee's basic data for the first time, Infinium HR displays an Update PTO Accruals screen that you can use to set up the employee's paid-time-off accrual information. To update the employee's paid-time-off accrual information at a later time, use the *Update Employee Accruals* [UEEA] function within *Update Employee Data* within *Employee Data*. For information on using the *Update Employee Accruals* function, refer to the "Processing Paid Time Off Accruals" part in the *Infinium PY Guide to Management Functions*.

Working with Employee User Groups

Use *Update Employee User Groups* to group employees for reporting and tracking purposes. You can use the employee user groups to group employees who want their expenses paid through Expense Management Fast Track for Infinium.

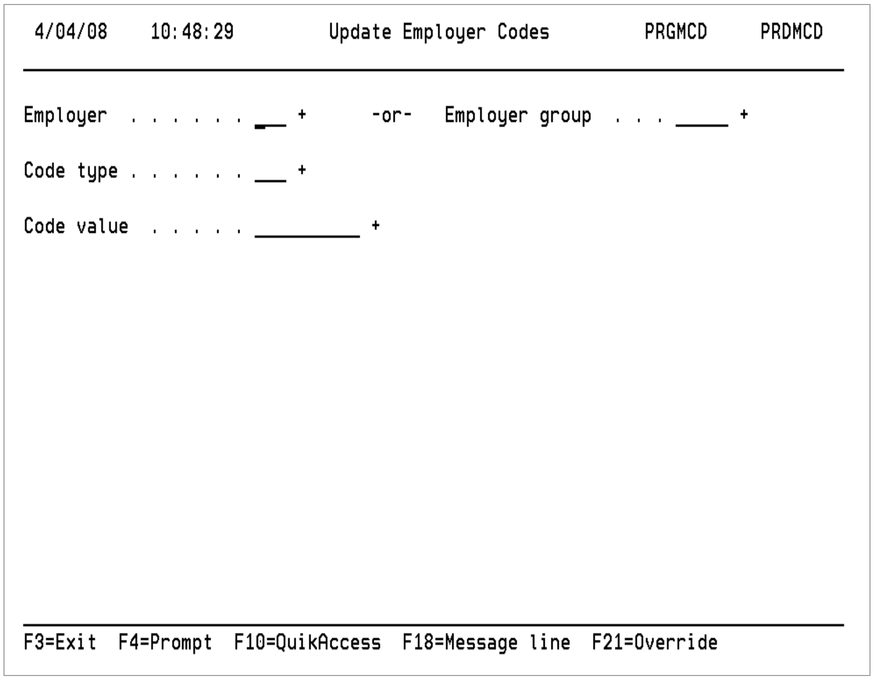
To create employee user groups, you must:

- Use the *Update Employer Codes* function to define code values for code type USG
- Assign employees to up to four user groups

Creating Code Values for Code Type USG

Complete the steps below to assign code values to code type USG.

1. From the HR main menu select *Master Files*
2. Select *Update Master Files.*
3. Select *Update Employer Codes* [UCD]. The system displays a screen similar to Figure 8-9.



```
 4/04/08    10:48:29        Update Employer Codes         PRGMCD     PRDMCD

Employer  . . . . . . ___ +       -or-   Employer group  . . . _____ +

Code type . . . . . . ___ +

Code value  . . . . . __________ +

F3=Exit  F4=Prompt  F10=QuikAccess  F18=Message line  F21=Override
```

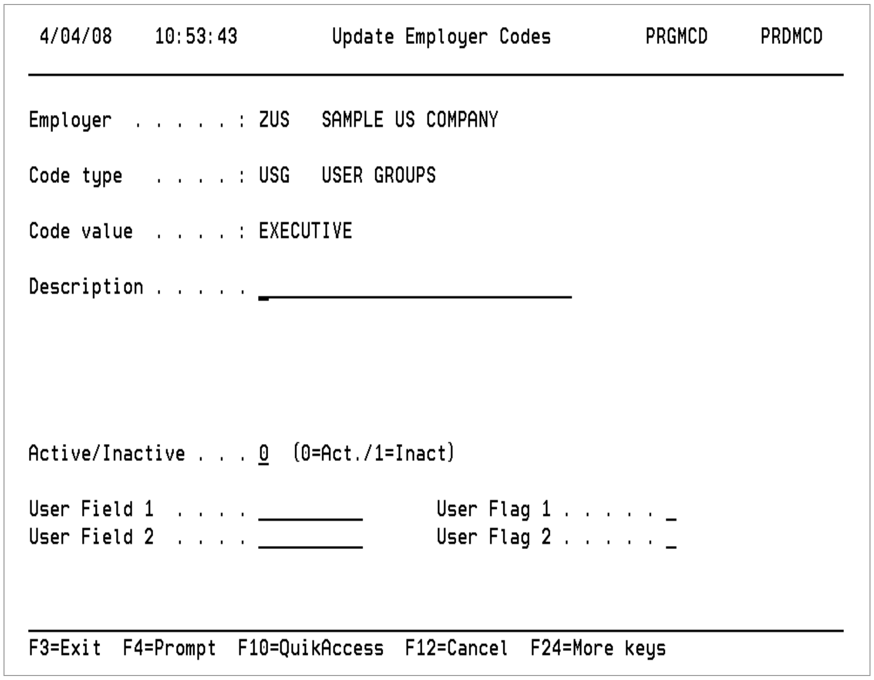
Figure 8-9: Update Employer Codes prompt screen

4 Specify an employer or employer group.

5 Type **USG** in the *Code type* field.

6 Type the code type that you want to use for this user group.

7 Press Enter. The system displays a screen similar to Figure 8-10.



```
4/04/08    10:53:43        Update Employer Codes        PRGMCD     PRDMCD

Employer  . . . . . : ZUS   SAMPLE US COMPANY

Code type   . . . . : USG   USER GROUPS

Code value  . . . . : EXECUTIVE

Description . . . . . _____________________________



Active/Inactive . . . 0  (0=Act./1=Inact)

User Field 1  . . . . __________      User Flag 1 . . . . . _
User Field 2  . . . . __________      User Flag 2 . . . . . _

F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel  F24=More keys
```

Figure 8-10: Update Employer Codes screen

8. Complete the fields on this screen as you normally would.
9. Press Enter.

Assigning Employees to User Groups

Complete the steps below to assign employees to user groups.

1. From the HR main menu select *Employee Data.*
2. Select *Update Employee Data.*
3. Select *Update Basic Data* [UPR]. The system displays the Employee Update Data prompt screen.
4. Specify the employer and employee and press Enter. The system displays the first Update Employee Basic Data screen.
5. Complete the fields on this screen as you normally would and press Enter. The system displays the second Update Employee Basic Data screen.
6. Complete the fields on this screen as you normally would and press Enter. The system displays the third Update Employee Basic Data screen.

7 Press F9. The system displays a screen similar to Figure 8-11.

```
 4/04/08  11:26:56      Update Employee User Groups       PRGMUG02   PRDMUG02
Employer  . . . :  ZUS                                          Page  1 of  1
Employee  . . . :      80005

User Group 1. . .  __________ +
User Group 2. . .  __________ +
User Group 3. . .  __________ +
User Group 4. . .  __________ +

Active/Inactive .  0 (0=Active 1=Inactive)

F3=Exit  F4=Prompt  F12=Cancel  F10=QuikAccess  F22=Delete
```

Figure 8-11: Update Employee User Groups screen

8 Use the information below to complete this screen.

User Group 1 through 4

Specify at least one value that represents the user group for this employee.

You must create user group code values for code type USG by using the *Update Employer Codes* function.

Active/Inactive

Specify whether this record is active for the employee. Valid values:

0	This record is active.
1	This record is inactive.

This field currently has no effect on processing; it is for future use.

9 Press Enter.

Listing Employee User Groups

You can generate an employee user group list that includes user group information for only XM users or all users.

Complete the steps below to generate a user group list.

1 From the HR main menu select *Employee Data.*

2 Select *List Employee Data.*

3 Select *List User Groups* [LUSG]. The system displays a screen similar to Figure 8-12.

```
 4/04/08  13:19:01          List User Groups          PRGJC50    PRDJC50

Employer  . . . .  ___ +      -or-     Employer Group. .  _____ +

XM Users Only?. .  _ (0=No 1=Yes)
Incl. Terminated?  _ (0=No 1=Yes)


F3=Exit   F4=Prompt  F10=Access
```

Figure 8-12: List User Groups screen

4 Use the information below to complete the fields on this screen.

Employer

Specify a valid employer. Leave this field blank to include all employers or to specify an employer group.

Employer Group

Specify a valid employer group code value to include employees within all employers in the group. Leave this field blank to include all employers or if you specify an employer.

XM Users Only?

Specify whether to list all employees associated with user group records or only employees that are defined as XM (Expense Management Fast Track for Infinium) users. You use the *Update Basic Data* function under *Employee Data* to define employees as XM users. Valid values:

0	List all employees associated with user group records.
1	List only employees that are defined as XM users and also have user group records.

Incl. Terminated?

Specify whether to include terminated employees on the report. Valid values:

0	Do not include terminated employees on the report.
1	Include terminated employees on the report.

5 Press Enter.

Notes

Chapter 9 Updating Employee Personnel Data

9

This chapter describes the process for updating personnel data.

The chapter consists of the following topics:

Overview of Updating Employee Personnel Data

In this chapter, you learn how to work with employee personnel data. You establish a personnel data record for each employee when you enter hiring information into Infinium HR. You normally enter hiring information for employees using the *Enter New Hire* function in either Infinium HR or Infinium PY; as an alternative, you can use the *Update Employee Data* function in either Infinium HR or Infinium PY. The *Enter New Hire* method of hiring employees is described in detail in previous parts of this guide and in the *Infinium PY Guide to Processing*.

Regardless of which method you use, the system automatically establishes information for the new employee in several files including basic data and personnel data. Basic data is accessible by users of both Infinium HR and Infinium PY. Personnel data is accessible only by Infinium HR users.

Personnel data consists of three screens of mostly optional employee information including the employee’s actual marital status (as opposed to the employee’s tax claiming status for U.S. employees), spouse’s name, emergency contact information, veteran’s information and military information. The only required information in Personnel Data is the employee’s marital status.

You can use the *Display Employee Data* function to view the employee’s Personnel Data information on-line; you cannot make changes to the information with this function. See the “Displaying Employee Data” chapter for details on the many employee information displays available on Infinium HR.

The *List Employee Profiles* function provides you with a complete report of Personnel Data information for one, some or all employees in the employer(s) you specify. Several standard reports in Infinium HR provide you with listings of selected Personnel Data information, including *List Employees Data, List Veterans,* and *List Spouses.* The “Printing Employee Data” chapter provides you with an overview of the standard reports of employee data that you can generate in Infinium HR.

You can use the *Update Personnel Data* function to make changes to the information in an employee’s personnel data record by typing over the existing information in the fields. When you do this, the prior information is lost; therefore, you should use extreme caution when you enter information directly in the personnel data record.

If you want to update the employee's marital status and spouse name in Personnel Data and also keep an ongoing historical record of the change, you should use the personal change transaction in the *Enter Personnel Actions* function. This function updates information in the employee's personnel data record and also builds an on-line employment history for the employee.

The system automatically updates the previous information section on the third screen of the personnel data record when you use the *Enter Personnel Actions* function to make changes to the employee's home address, position, job, levels or employer.

The "Entering Personnel Actions" chapter and the "Using Additional Personnel Action Functions" chapter that follow this chapter provide you with detailed information about using the *Enter Personnel Actions* function.

Objectives

After you complete this chapter, you should be familiar with how to:

- Work with personnel data
- Access personnel data information
- Update employee personnel data

Working with Personnel Data

The system establishes the employee's personnel data record when you enter the employee's hiring information into Infinium HR. You can use the *Enter New Hire* or *Update Employee Data* functions to hire the employee.

If you use the *Applicant Administration* function, some of the information in the employee personnel data record defaults from the employee's applicant data record during the new hire process. The *Enter New Hire* function includes fields for some, but not all of the information that defaults from the applicant data record. The following table identifies the personnel data information that you can see when you use the *Enter New Hire* function.

Since most of the information in the applicant data record is optional, your Infinium HR implementation team determines which information you fill in for each applicant. For fields that are included in the *Enter New Hire* process, you can fill in missing information during the new hire process or make changes to the information that defaulted from the applicant data record. You can use the *Update Personnel Data* function to fill in or update any additional information that you require.

After you hire the employee into Infinium HR, you maintain most of the information in the first and second screens of the personnel data record by manually typing over the previous information in each field, with the exception of the employee's marital status information. If you want to store the employee's previous marital status and spouse name in the employee's on-line history, you can use the personnel change transaction in the *Enter Personnel Actions* function to update the *Marital Status* and *Spouse Name* fields.

The system automatically maintains the previous information fields on the third screen of the personnel data record when you use the *Enter Personnel Actions* function to make changes to the employee's assigned position, job, levels or employer.

The following table provides a quick reference on how you fill in and maintain personnel data information including:

- Fields in personnel data that default from the applicant data record during the hire process
- Fields from applicant data that you can update during the *Enter New Hire* function
- Fields that the system fills in during the *Enter New Hire* function

- Fields you maintain using the *Enter Personnel Actions* function
- Fields you maintain by entering new information directly into personnel data

See the parts in this guide entitled “Entering Personnel Actions” and “Using Additional Personnel Action Functions” for details on using personnel actions.

Personnel Data Field Name	Scrn #	Initial Source	Maintenance
Position *Position Level* *Season*	1	All default from the position control during the *Enter New Hire* function.	Use *Enter Personnel Actions* - transfer, promotion, demotion or transfer transactions.
Height *Weight* *Restrictions* *Ex-Felon* *Handicap Code* *Relocation* *Marital Status* *Dependents* *Citizen of* *Visa County* *Alien Number* *Visa Type* *Visa Number* *Visa Exp Date* *Place of Birth*	1	Applicant data Can fill in or update 3 fields when you use the *Enter New Hire* function: *Handicap Code* *Marital Status* *Alien Number*	Use *Enter Personnel Actions*- Personal change transaction to maintain the *Marital Status* field. Maintain other fields directly in personnel data.
Last Donation	1	Not included in the *Enter New Hire* function	Use *Enter Personnel Actions* - blood donation transaction.
Blood Type *Calendar Code* *Primary Language* *Passport Number* *Passport Exp Date* *Passport Country*	1	Not included in the *Enter New Hire* function	Maintain directly in personnel data.
Spouse Name	1	Fill in when you use the *Enter New Hire* function.	Use *Enter Personnel Actions* - personal change transaction.

Personnel Data Field Name	Scrn #	Initial Source	Maintenance
Emergency information: *Contact Name* *Address* *City/State* *Primary Tel #* *Relationship*	2	Fill in when you use the *Enter New Hire* function.	Maintain directly in personnel data.
Physician *Secondary Tel #*	2	Not included in the *Enter New Hire* function	Maintain directly in personnel data.
Military information: *Veterans Code* *Military Branch* *Discharge Date* *Military Occ.* *Discharge*	2	Applicant data Can fill in or update the *Veterans Code* field when you use the *Enter New Hire* function	Maintain directly in personnel data.
Vet 100 Category *Vet 4212 Category*	2	Not included in the *Enter New Hire* function	Maintain directly in personnel data.
Previous information: *Name* *Address* *(Line 2)* *City/State*	3	Not included in the *Enter New Hire* function	Use *Enter Personnel Actions* - personal change transaction.
Previous information: *Job Change Date* *Job Code* *Position* *Level Change Date* *Levels 1, 2, 3, 4* *Employer* *Employee*	3	Not included in the *Enter New Hire* function	Use *Enter Personnel Actions* - transfer, promotion, demotion, or rehire transactions.

Accessing Personnel Data Information

You can access the employee's personnel data screen in two ways:

- Use the *Update Personnel Data* function on the Infinium HR main menu to directly access the basic data screens.
- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing nine options, from which you can select the option(s) you want to access, including personnel data.

The system presents you with the same three screens of information, regardless of which way you access the personnel data record.

Using the *Update Personnel Data* Function

You use the *Update Personnel Data* function to directly access the employee's personnel data information. Follow these steps to access the *Update Personnel Data* function:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data*.
3. Select *Update Personnel Data* [UEP]. The system displays the screen shown in Figure 9-1.

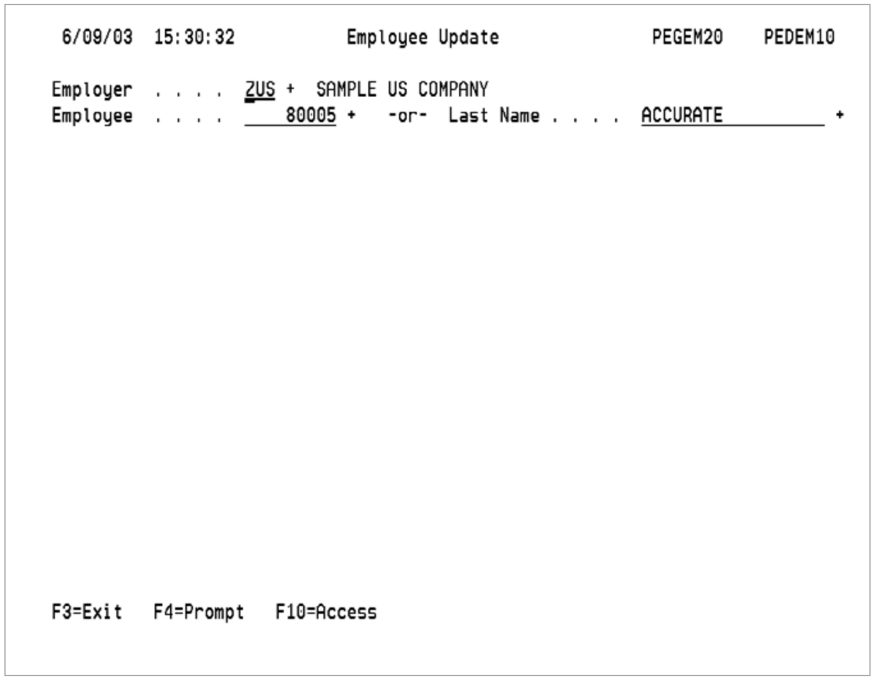


Figure 9-1: Employee Update prompt screen

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose information you want to view or update.

Employer

Type the code that represents the employer into which you hired the new employee.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or the entire last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and

automatically fills in the employee number and last name of the employee you selected.

See the “Displaying Employee Data” chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee’s name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee’s entire last name, type as much as you know and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5. After you fill in the employee number, press Enter. The system displays the first screen of the employee’s personnel data record.

Using the *Update Employee Data* Function

You use the *Update Employee Data* function to display a selection screen from which you can access nine different categories of employee information including the employee’s personnel data. This option provides you with a convenient and efficient way to access multiple types of information for a selected employee.

Follow these steps to access the *Update Employee Data* function:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data*.
3. Select *Update Employee Data* [UE]. The system displays the screen shown in Figure 9-2.

```
 8/09/02  13:12:57            Employee Update             PEGMZZ     PEDMZZ

Employer  . . . .  ZUS +  SAMPLE US COMPANY
Employee  . . . .  _____80038 +  -or-   Last Name . . . .  GREEN____________ +










F3=Exit   F4=Prompt   F6=Add   F10=Access
```

Figure 9-2: Employee Update prompt screen 1 of 2

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose information you want to view or update.

Employer

Type the code that represents the employer into which you hired the new employee.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or the entire last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and

automatically fills in the employee number and last name of the employee you selected.

See the “Displaying Employee Data” chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee’s name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee’s entire last name, type as much as you know and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5 After you fill in the employee number, press Enter. The system displays the first screen of the employee’s personnel data record.

```
 8/09/02  13:14:28            Employee Update            PEGMZZ     PEDMZZ

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80038   KELLY GREEN
Address . . . . :  8040 LEPRECHAUN LANE
City/Town . . . :  DUBLIN
State/Province  :  CA                 Postal Code . . :  90201

Area        . . :  200     CENTRAL AREA
Division    . . :  ADMIN   ADMINISTRATION
Department  . . :  ACCT    ACCOUNTING
Cost Centr  . . :  100     ACCOUNTING ADMINISTRATION
                 Opt           Available options
                  _     Basic Data
                  _     PTO Accrual Data
                  X     Personnel Data
                  _     Education Data - Formal
                  _     Education Data - O.J.T.
                  _     Prev employment history
                  _     Property In Possession
                  _     Dependent Data
                  _     Automobile Data                                  +
F3=Exit   F10=Access
```

Figure 9-3: Employee Update prompt screen 2 of 2

6 Use the following information to fill in the fields on this screen:

The system displays information at the top of the screen that defaults from the employee's basic data record and a menu of options.

Opt

You use the menu on this prompt screen to access up to nine categories of employee information. The first eight topics are visible in the above screen print. When you press PgDn, the screen scrolls and displays the *Employee Log, Enter Hire Transaction*, and *User Defined Data* options.

To select an option, type any character in the *Opt* field next to the option. Then press Enter. The system displays the specified option. You can select more than one option from this menu; the system displays the options in the order shown on the prompt screen.

Updating Employee Personnel Data

This section provides you with detail on each field contained in the three screens of employee personnel data. Here the system stores miscellaneous personal information about the employee including the employee's marital status, spouse name, emergency contact, veteran's information, and previous job, position, level and employer assignments.

You can access the employee's personnel data screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing nine options, from which you can select the option(s) you want to access, including personnel data.
- Use the *Update Personnel Data* function on the Infinium HR main menu to directly access the personnel data screen.

Follow the directions in the preceding section for either method to access the employee's personnel data record.

1 From the *Update Employee Data* prompt screen, select the *Personnel Data* option and press Enter. The system displays the first screen of the employee's personnel data record as shown in Figure 9-4.

If you used the *Update Personnel Data* function, the system displays the first screen of the employee's personnel data record as shown in Figure 9-4.

```
 6/09/15  17:44:41     Update Employee Personnel Data      PEGMMS     PEDMMS
                                                               Page  1  of  3
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005 ALAN D ACCURATE
Position  . . . :  114220    SAFETY ENGINEER
Position Level  :  00
Height  . . . . .  ___                 Season  . . . . .  SUMM  +
Weight  . . . . .  ___                 Restrictions  . .  BEND  +
Ex-Felon  . . . .  0  (0=No 1=Yes)     Handicap Code . .  WHEEL +
Blood Type  . . .  A+  +               Calendar Code . .  REGLR +
Last Donation . .  12251994            Relocation  . . .  WILL  +
Date of Death . .  11092001            Primary Language.  ENG   +

Marital Status  .  M                   Dependents  . . .   0
Spouse Name . . .  ARLENE ACCURATE

Citizen of  . . .  USA +               Visa Country  . .  USA +
Alien Number  . .  ____________        Visa Type . . . .  PRV  +
Passport Number .  343223112341        Visa Number . . .  123456789789
Passport Exp Date   1012013            Visa Exp Date . .   2022014
Passport Country.  USA +               Place of Birth  .  __________________

F3=Exit  F4=Prompt  F8=I-9  F10=Access  F16=Update/End  F22=Delete
```

Figure 9-4: Update Employee Personnel Data screen 1 of 3

2 Use the following information to fill in the fields on this screen:

If you use the *Applicant Administration* function, the system automatically defaults information into some of the fields in the personnel data screens when you hire a new employee using the *Enter New Hire* function or the *Update Employee Data* function. You can update some of these fields and fill in additional fields during the new hire process. See the table beginning on page 9-4 to identify the fields that the system includes in the *Enter New Hire* function.

The information on the third screen of the employee personnel data is automatically maintained through the *Enter Personnel Actions* function. You use personnel actions to create historical information for employees. The information below is based on the assumption that you use personnel actions to maintain employee information and that you typed **1** in the *Positions Used?* field on the employer control record.

Fields are generally discussed in cursor flow order although there are some exceptions to this rule to allow grouping of fields that are logically related to each other.

The only required field on this screen is *Marital Status*. Fill in the balance of the fields depending on your business requirements.

Height

Type the height of this employee using inches or centimeters.

Weight

Type the weight of this employee using pounds or kilograms.

Season

If applicable, type the code value that represents the season during which this employee works. This code value can default from the employee's position assignment. You define code values for this field using code type **SEA**. You can use the promotion, demotion, transfer or rehire transaction in the *Enter Personnel Actions* function to update this field

Restrictions

Type the code value that indicates whether the employee has any physical limitations on the type of work the employee can perform. You define code values for this field using code type **WRE**. This code value can default from the employee's applicant data record.

Ex-Felon

Use this field to indicate whether the employee has stated he or she has been previously convicted of a crime. Valid values are:

0	No
1	Yes

This value can default from the employee's applicant data or you can enter it during the *Enter New Hire* function.

Handicap Code

Type the code value that indicates the employee's physical disabilities. You define code values for this field using code type **HDC**. This code value can default from the employee's applicant data or you can enter it during the *Enter New Hire* function.

Blood Type

Type the code value that represents the blood type of the employee. You define code values for this field using code type **BLD**.

Last Donation

Type the date the employee last donated blood. The system automatically updates this field when you enter a blood donation transaction in the *Enter Personnel Actions* function.

Relocation

Type the code value that represents whether this employee will move to another work location. You define code values for this field using code type **RLO**. This code value can default from the employee's applicant data.

Calendar Code

Type the code value that represents the employer calendar that applies to this employee. You define values for this field using code type **CAL**.

You use the *Calendar Code* field in the *Personnel Calendar* function. Information on this function is included in the *Infinium HR Guide to Management Functions*.

Date of Death

Type the date that this employee died. Infinium PY uses the information in this field to check the Deceased box on the W-2 Form.

Primary Language

Type the code value that represents the employee's primary language. You define code values for this field using code type **LNG**.

Marital Status

Type the value that indicates the employee's actual marital status. You must enter information into this field when you use the *Enter New Hire* function; Therefore this field is automatically filled in for a newly hired employee. You can maintain this field using the personal change transaction within the *Enter Personnel Actions* function or update it directly in personnel data. Valid values are:

M	Married
S	Single
D	Divorced
W	Widowed
P	Separated

O Other

Note: You enter the federal, state and local tax claiming status for U.S. employees in the *Update Payroll Data* function.

Dependents

Type the number of dependents for this employee. This information can default from the employee's applicant data. You update this field directly in personnel data.

You can use the *Update Dependents Data* function to type additional information about the employee's dependents such as their name, date of birth, and address. You can use dependent information in the *Benefits Administration* function.

Spouse Name

Type the name of the employee's spouse. This information can default from the employee's applicant data or you can enter it during the *Enter New Hire* function. You can use the personnel change transaction in the *Enter Personnel Actions* function to maintain the *Spouse Name* field or update it directly in personnel data.

Citizen of

Type the code value that represents the country of which the employee is a citizen. This code value can default from the employee's applicant data. You define code values for this field using code type **CTR**.

Visa Country

Type the code value that represents the country that issued the employee's visa. This code value can default from the employee's applicant data. You define code values for this field using code type **CTR**.

Visa Type

Type the code value that identifies the type of visa possessed by the employee. This value can default from the employee's applicant data. You define code values for this field using code type **VIA**.

Visa Number

Type the number assigned to the employee's visa. This information can default from the employee's applicant data. This is a 12-character free-form field that does not require pre-defined values.

Visa Exp. Date

Type the date on which this employee’s visa expires. This information can default from the employee’s applicant data.

Place of Birth

Type the city, state and/or country in which the employee was born. This is an 18-character free-form field that does not require pre-defined values.

Alien Number

If the employee is a legal alien in the United States, type the employee’s alien registration number. This information can default from the employee’s applicant data. This is a 12-character free-form field that does not require pre-defined values.

Passport Number

Type the number on the passport issued to the employee. This is a 12-character free-form that does not require pre-defined values.

Passport Exp Date

Type the date the employee’s passport expires.

Passport Country

Type the code value that represents the country that issued the employee’s passport. You define code values for this field using code type **CTR**.

3 Press Enter to go to the next screen of the *Update Personnel Data* function. The system displays the screen shown in Figure 9-5.

```
 6/09/15  17:09:04     Update Employee Personnel Data      PEGMMS     PEDMMS
                                                                Page  2  of  3
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005 ALAN D ACCURATE


                            Physician Information

Physician . . . .  DR. HARVEY GRANT
Physicians Tel# .


                            Military Information
Veterans Code . .  RESER +              Vet 100 Category.  3 +
Military Branch .  ARMY +               Vet 4212 Category  _ +
Military Occ. . .  ACCOUNTANT           Discharge Date  .   8011988
                                        Discharge . . . .  HON +

                      Health and Disability Information
Disability? . . .  _                    Disability Begin Date
Smoker? . . . . .  _                    Disability End Date

F3=Exit  F4=Prompt  F8=I-9  F9=Contacts  F10=Access  F24=More keys
```

Figure 9-5: Update Employee Personnel Data screen 2 of 3

On this screen, you can:

- Enter physician information

  You type physician information for the employee on the top half of this screen. This information can default from data you entered during the *Enter New Hire* function.

- Enter military information

  You use the mid-section of this screen to type military information for the employee, including his or her veteran status, military branch, occupation and discharge date. The system uses information from some of these fields in the List Veterans report and the List Vet VETS-4212 report; these reports are included in the *Administrative Reporting* function.

- Enter health and disability information
- Enter I-9 information by pressing F8
- Enter or update emergency contact information by pressing F9

4 Use the following information to fill in the fields on this screen:

Physician

Type the name of the employee’s doctor.

Physician's Tel #

Type the physician's telephone number.

Veterans Code

Specify the code value that indicates the employee's current military status. This code value can be the value from the employee's applicant data record or you can enter it in the *Enter New Hire* function.

Vet 100 Category

Note: VETS-100 reporting was discontinued in 2015.

Specify the code value that indicates how the employee should be classified on the VETS-100 (Veterans' Employment and Training Service) report. This code value is associated with the VET code type. Valid values for this field are:

0 or **blank**	Employee is not a veteran.
1	Employee is a special disabled veteran (L).
2	Employee is a Vietnam-era veteran (M).
3	Employee is both a special disabled veteran and a Vietnam-era veteran (L, M).
4	Employee is an other protected veteran (N).
5	Employee is a special disabled veteran and other protected veteran (L, N).
6	Employee is a Vietnam-era veteran and other protected veteran (M, N).
7	Employee is a special disabled veteran, Vietnam-era and other protected veteran (L, M, N).

When you generate the VETS-100 report, information about employees who are veterans and who were hired during the twelve months prior to the specified date in the *To Date* field is in one or more of columns P, Q, R, and S in addition to columns L, M, N, and O. Information for employees hired during the 12 months prior to the date you specify in the *To Date* field are in column T.

Vet 4212 Category

For US federal contractor employers, specify a VETS-4212 report category code (Veterans' Employment and Training Service). The code values are associated with the VTA code type.

Employers can continue to track veteran codes separately by specific category; however, all veterans are summarized into one set of counts for column A, Protected Veterans, on the VETS-4212 report.

Valid values are:

blank or **0**	Non-veteran
1	Disabled veteran
2	Other protected veteran
3	Armed Forces Service Medal veteran
4	Disabled veteran and other protected veteran
5	Disabled veteran and Armed Forces Service Medal veteran
6	Armed Forces Service Medal veteran and other protected veteran
7	Disabled veteran, other protected veteran, and Armed Forces Service Medal veteran
8	Protected Veteran

When you generate the VETS-4212 report, information is in column C in addition to column A for employees who are veterans and who were hired during the twelve months prior to the specified date in the *To Date* field. Information for employees hired during the 12 months prior to the date that you specify in the *To Date* field is in column D.

The VETS-4212 category is stored in the PESURG field of personnel master file, PEPMS, in position 1.

Military Branch

Type the code value that indicates the branch of the military service in which the employee served. This value can default from the employee's applicant data record. You define code values for this field using code type **MLB**.

Discharge Date

Specify the date the employee is discharged from military service, if applicable.

Military Occ

Use this field to type the employee's job classification or military occupation specialty while in the military service. This is a 10-character free-form field that does not require pre-defined values.

Discharge

Type the code value that represents the type of military discharge the employee received. This value can default from the employee's applicant data record. You define code values for this field using code type **MDC**.

Disability?

Specify whether this employee is disabled and the term of the disability. Valid values are:

Blank	None
1	Short term disability
2	Long term disability
3	Permanent or total disability

Disability Begin Date

If you indicated that this employee is disabled, specify the starting date for the disability.

Smoker?

Specify whether this employee is a smoker. Valid values are:

N	No
y	Yes
Blank	Unknown

Disability End Date

Specify the date when this employee's disability ended.

5 Press Enter. to advance to the third and final screen of the personnel data record. The system displays the screen shown in Figure 9-6.

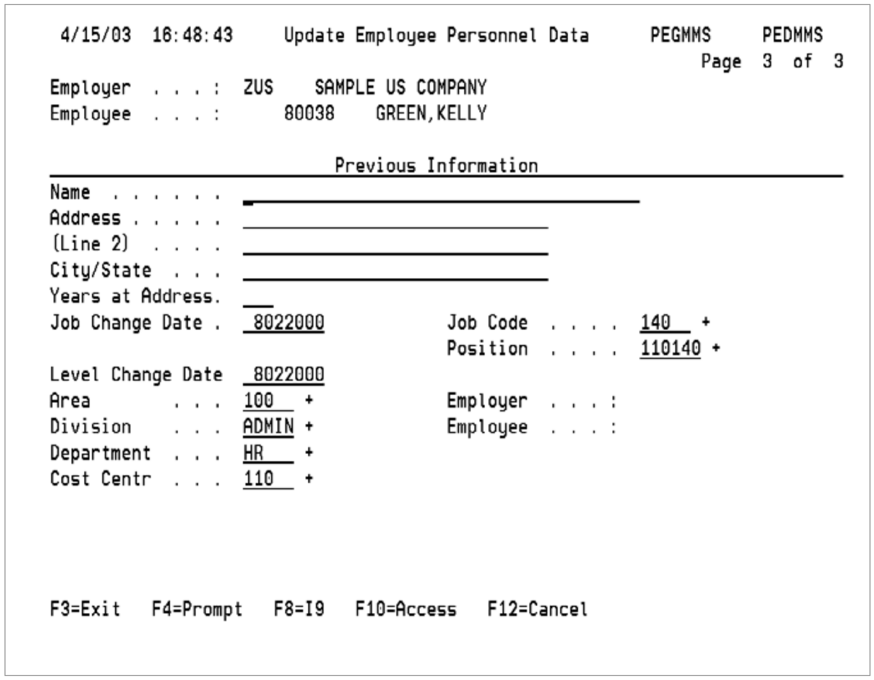


Figure 9-6: Update Employee Personnel Data screen 3 of 3

6 Use the following information to interpret the fields on this screen:

All of the information on this screen is filled in by the system automatically when you use the *Enter Personnel Actions* function. See the table that begins on page 9-4 for reference. You use this screen to view the employee's information prior to the employee's most recent personal change, transfer, promotion, demotion or rehire transaction.

Name

The system displays the employee's previous name. The system automatically fills in this field when you type a personal change transaction for the employee in the *Enter Personnel Actions* function. The system also defaults information into this field when you type the *Birth Name* field in the *Enter New Hire* function.

Address

The system displays the employee's previous address. The system automatically fills in this field when you type a personal change transaction for the employee in the *Enter Personnel Actions* function.

(Line 2)

The system displays the employee's previous address. The system automatically fills in this field when you type a personal change transaction for the employee in the *Enter Personnel Actions* function.

City/State

The system displays the employee's previous city or state or province of residence. The system automatically fills in this field when you type a personal change transaction for the employee in the *Enter Personnel Actions* function.

Years at Address

Type the length of time the employee lived at the prior address. This is a three-character free-form field that does not require pre-defined values. The system does not automatically update this field.

Job Change Date

The system displays the date the employee was assigned to the current job in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another.

Job Code

The system displays the employee's prior job code in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another if the job code associated with the new position is different from the job code associated with the employee's prior position.

Position

The system displays the employee's prior position code in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another.

Level Change Date

The system displays the date the employee moved into the current level assignments in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another if the level(s) associated with the old position are different from the level(s) associated with the new position.

Level 1

The system displays the code associated with the employee's prior level one assignment in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another if the level one code associated with the old position is different from the level one associated with the new position.

Level 2

The system displays the code associated with the employee's prior level two assignment in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another if the level two code associated with the old position is different from the level two code associated with the new position.

Level 3

The system displays the code associated with the employee's prior level three assignment in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another if the level three code associated with the old position is different from the level three code associated with the new position.

Level 4

The system displays the code associated with the employee's prior level four assignment in this field. The system automatically updates this field when you use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move the employee from one position to another if the level four code associated with the old position is different from the level four code associated with the new position.

Employer

If the employee transferred from one employer to another, the system displays the code that represents the employee's current employer in this field. The system automatically updates this field when you use the transfer transaction in the *Enter Personnel Actions* function to move the employee from one employer to another.

Employee

If you use the transfer transaction in the *Enter Personnel Actions* function to move the employee to a new employer and assign the employee a new number in the new employer, the new employee number displays in this field.

7 When you press Enter, the system exits from the employee's personnel data record.

If you used the *Update Personnel Data* function to review the personnel data record, the system displays the prompt screen for the *Update Personnel Data* function as shown in Figure 9-1. You can type the employee number of another employee whose personnel data information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the personnel data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 9-3. You can select additional information for the specified employee or press F3. When you select more than one function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Chapter 10 Updating Additional Employee Data

10

This chapter describes the process you use for updating additional employee information.

The chapter consists of the following topics:

Overview of Updating Additional Employee Data

In this chapter, you learn how to work with the following options in the *Update Employee Data* function:

Type of Information	Description
Education Data	Contains formal education and tuition reimbursement information. Can have multiple records for each employee.
On-the-Job Training Data	Contains employee skill information and on-the-job training data. Can have multiple records for each employee.
Previous Employment Data	Contains information about previous employers and jobs held. Can have multiple records for each employee.
Property Data	Contains information about company property issued to employees. Can have multiple records for each employee.
Dependents Data	Contains information about dependents and beneficiaries of employees. Can have multiple records for each employee.
Automobile Data	Contains information about employees' personal cars, including make and model, license and registration numbers and assigned parking space and lot.
Log Data	An on-screen memo area where you can enter lengthy free-form text about an employee; can specify a notify date and direct the note to yourself or another Infinium HR user. Can have multiple log records for each employee.
Hire Transaction	The system automatically creates a hire transaction record when you use the *Enter New Hire* function. It contains key information such as the employee's hire date, hiring position, starting base rate and initial status code value.

Type of Information	Description
Eligibility Data US	Contains I-9 information that you can use to verify entitlement to work in the US. Used to verify legal entitlement to work in the U.S.
User-Defined Data	Contains three screens of user-defined fields for use in tracking information that is unique to your company or business.
Pay Component Data	Used to assign pay component codes to an employee. The system uses pre-defined dollar values for each pay component to compute the employee's base rate.
Foreign National Data	Used to track the pay of employees on foreign assignments. Can state the employee's annual rate in U.S. or Canadian dollars or in foreign currency.
Emergency Contact Information	Contains information about employee's emergency contacts; use to identify a primary contact and other contacts.

The system automatically establishes information in the hire transaction record when you enter hiring information for the employee using either the *Enter New Hire* or *Update Employee Data* functions. The system does not require you to enter information into any of the other additional data files listed in the above table. Your human resources implementation team makes decisions about which information is needed at your location to support your business requirements.

You can enter information in the eligibility data and user-defined data records as you hire a new employee or you can update these records after the employee is established in Infinium HR.

If you used the *Applicant Administration* function to enter skills and on-the-job training information for the prospective employee, the system automatically transfers the information to the employee's education and on-job training records when you use the *Enter New Hire* function to enter hiring information for the new employee.

You can enter information into the rest of the functions listed in the preceding table after you complete the hire process for the new employee in Infinium HR.

Working with Additional Employee Data

With the exception of the hire transaction, all of the employee information described in this chapter is optional. Your Infinium HR implementation team makes decisions on which information is needed at your location to support your business requirements.

The following table identifies the options you use to enter additional information about the employee within the *Update Employee Data* function. The table indicates which applicant or employee data functions are related to these additional information screens.

Function	Related Option
Update Education Data	Applicant Education Data screen within the *Update Applicant Data* function.
Update On-Job-Training Data	Applicant Job Training Data screen within the *Update Applicant Data* function.
Update Prev Employment History	None
Update Property Data	None
Update Dependents Data	*Update Employee Enrollments* function within Benefits Administration.
Update Automobile Data	None
Update Log Data	None
Update Eligibility Data (US)	Can use F8 to access from Screen 2 of the *Enter New Hire* function.
Update User Defined Data	Screens 5, 6 and 7 of the *Enter New Hire* function.
Update Pay Component Data	None
Update Foreign National Data	Can use F9 to access from Screen 2 of the *Enter New Hire* function.
Hire Transaction	Created by the *Enter New Hire* function or the *Update Employee Data* hire function on Infinium HR. Not accessible from the Infinium HR main menu.

Function	Related Option
Update Emergency Contact	Use F9 on the Update Personnel Data screen to access Update Emergency Contact.

Defining Code Values

Before you use the employee information functions listed below, you must define code values for certain code types. The following table identifies the code types that are used in each of the additional employee information functions.

See the sections in this chapter that discuss each function for additional information on how and where you use these code types.

Function	Code Type	Code Description
Update Education Data	**SKL** **TSK** **REI**	Skill Task Tuition Reimbursement
Update On-Job Training Data	**SKL** **TSK** **OJT** **LOC**	Skill Task On Job Training Program Type Location
Update Prev Employment History	**TRM** **IND** **RLE** **CUR**	Termination Industry Code Role Code Currency Type
Update Property Data	**PRP** **STP** **CTR**	Property Code Payroll State Country
Update Dependents Data	**REL**	Dependent Relationship
Update Automobile Data	**STA** **LOT**	Personnel State Parking Lot
Update Eligibility Data (US)	**VER** **LTA** **LTB** **LTC**	Verification type I-9 list type A I-9 list type B I-9 list type C
Update User Defined Data	**UC1-UCX**	User Defined Code Types 1 - 10
Update Foreign National Data	**CUR** **SAL**	Currency Type Salary Change Reason

Accessing Additional Employee Information Functions

You can access all but one screen of the employee data records listed in the preceding table from the Infinium HR main menu. Most of the information can also be accessed from the prompt screen for the *Update Employee Data* function.

You cannot access the employee's hire transaction record from the Infinium HR main menu. You use the prompt screens for the *Update Employee Data* function or the *Enter Personnel Actions* function to access the employee's hire transaction.

The table below summarizes the ways you can access the employee information discussed in this chapter. It also includes the Quick Access codes in brackets for the options that you can access from the Infinium HR main menu.

Employee Information	How to Access
Education Data [**UEE**] *On-Job Training Data* [**UEO**] *Previous Employment History* [**UPEH**] *Property Data* [**UEPR**] *Dependents Data* [**UED**] *Automobile Data* [**UEAD**] *Log Data* [**UEL**]	From the Infinium HR main menu or From the *Update Employee Data* prompt screen
Hire Transaction	From the prompt screen for the *Update Employee Data* function or From the prompt screen for the *Enter Personnel Actions* function
Eligibility Data (US) [**UI9**] *User Defined Data* [**UEU**] *Foreign National Data* [**UFN**] *Update Emergency Contacts* [**UECS**]	From the Infinium HR main menu

The following major sections in this chapter provide you with detailed information on each of the functions listed above. When applicable, the sections include information on how to access the specified function from the

Infinium HR main menu. See below for information on how to use the *Update Employee Data* function to access six of the employee records listed in the preceding table.

Using the *Update Employee Data* Function

You use the *Update Employee Data* function to display a selection screen from which you can access ten different categories of employee information. This option provides you with a convenient and efficient way to access multiple types of information for a selected employee.

Follow these steps to access the *Update Employee Data* function.

1 From the Infinium HR main menu select *Employee Data.*

2 Select *Update Employee Data.*

3 Select *Update Employee Data* [UE]. The system displays the screen shown in Figure 10-1.

```
 8/09/02  13:34:57          Employee Update           PEGMZZ    PEDMZZ

Employer  . . . .  ZUS +
Employee  . . . .  _    80009 +  -or-   Last Name . . . .  CARGO              +






F3=Exit   F4=Prompt   F6=Add   F10=Access
```

Figure 10-1: Employee Update prompt screen 1 of 2

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose information you want to view or update.

Employer

Type the code that represents the employer into which you hired the new employee. Press F4 to display a list of valid employers.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of the employee's last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number and last name of the employee you selected.

See the "Displaying Employee Data" chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee's name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee's entire last name, type as much as you know and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5. After you fill in the employee number, press Enter. The system displays the screen shown in Figure 10-2.

```
 8/09/02  13:35:18           Employee Update            PEGMZZ     PEDMZZ

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80009   CARRIE D CARGO
Address . . . . :  110 MERCHANDISE DRIVE
City/Town . . . :  PAYLOAD
State/Province  :  PA                   Postal Code . . :  80198

Area        . . :  100     WESTERN AREA
Division    . . :  TRANS   TRANSPORTATION
Department  . . :  TRUCK   TRUCKING
Cost Centr  . . :  401     INTERSTATE DRIVERS
                 Opt           Available options
                  _     Basic Data
                  _     PTO Accrual Data
                  _     Personnel Data
                  _     Education Data - Formal
                  _     Education Data - O.J.T.
                  _     Prev employment history
                  _     Property In Possession
                  _     Dependent Data
                  _     Automobile Data                                +
F3=Exit   F10=Access
```

Figure 10-2: Employee Update prompt screen 2 of 2

6 Use the following information to fill in the fields on this screen:

The system displays information at the top of the screen that defaults from the employee’s basic data record and a menu of options.

Opt

You use the menu on this prompt screen to access up to ten categories of employee information. The first eight topics are visible in the above screen print. When you press PgDn, the screen scrolls and displays the *Employee Log, Enter Hire Transaction*, and *User Defined Data* options.

To select an option, type any character in the *Opt* field next to the option. Then press Enter. The system displays the specified option. You can select more than one option from this menu; the system displays the options in the order shown on the prompt screen.

Updating Education Data

You use this function to record the educational accomplishments of an employee. You can track both internal and external courses the employee takes as well as record degrees obtained by employees.

You can also use this screen to identify skills possessed by the employee or you can use the *Update Education Data - O.J.T.* (On-the-Job Training) function to track skills.

You can access the employee's Education Data screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including education data.
- Use the *Update Education Data* function on the Infinium HR main menu to directly access the Education Data screen.

1 From the *Update Employee Data* prompt screen, select the *Education Data - Formal* option and press Enter. The system displays the Employee Education Data selection screen shown in Figure 10-3.

If you used the *Update Education Data* function, complete the prompt screen. Press Enter. The system displays the Employee Education Data selection screen shown in Figure 10-3.

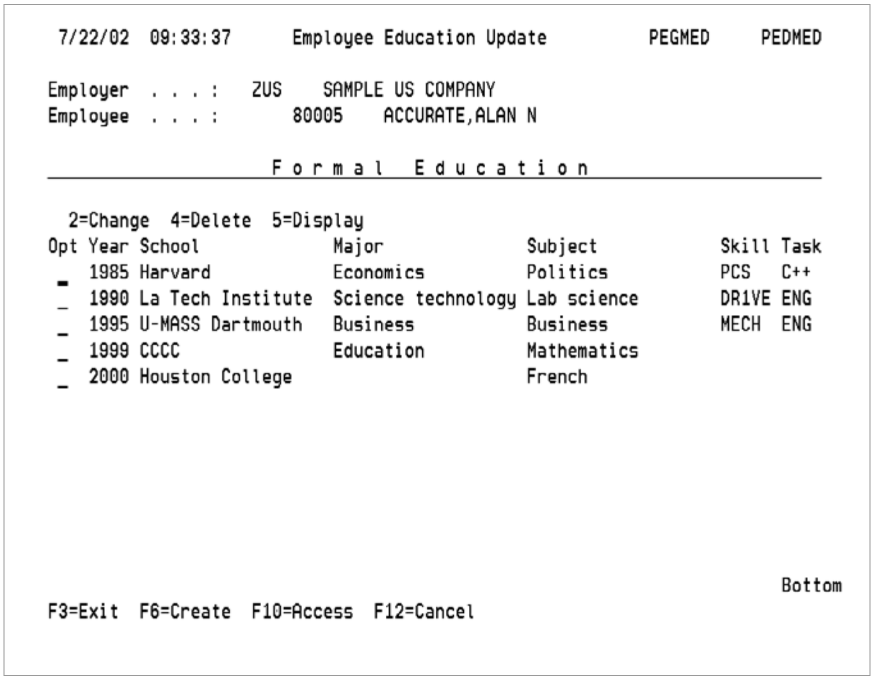


Figure 10-3: Employee Education Update selection screen

From here you can:

- Create a new education record by pressing F6
- Update an education record by typing **2** in an *Opt* field
- Delete an education record by typing **4** in an *Opt* field
- Display an education record by typing **5** in an *Opt* field

2 Press F6 to create a new education record for this employee. The system displays the Update Employee Education screen shown in Figure 10-4.

```
 7/29/02  11:33:39         Create Employee Education       PEGMED2    PEDMED2

Employer . . . :   ZUS    SAMPLE US COMPANY
Employee . . . :       80005    ACCURATE,ALAN N


Year . . . . . .  ____
School  . . . . .  __________________
Degree  . . . . .  ___
Subject . . . . .  __________________
Major . . . . . .  __________________
Minor . . . . . .  __________________
Rank  . . . . . .  ____
GPA . . . . . . .  ____
Skills  . . . . .  _____ +
Tasks . . . . . .  _____ +
Date Started  . .  ________
Date Completed  .  ________
Reimbursement . .  _____ +
Amount Reimbursed  __________
Date Reimbursed .  ________

F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel
```

Figure 10-4: Education Update screen (Formal Education)

3 Use the following information to fill in the fields on this screen:

Year

Type the year this applicant obtained his or her degree or skill. This is a 4-character free-form field that does not require pre-defined values. You must enter a value in this field if you want to record employee education or skills information on this screen.

School

Type the name of the school this applicant attended or from which this applicant graduated. This is an 18-character free-form field. If you type information in this field, you must also type information in the *Subject* or *Major* fields.

Degree

Type the degree obtained by the employee. This is a 3-character free-form field that does not require pre-defined values. For example, you can type **MBA** to indicate the applicant possesses a Masters degree in Business Administration or **HS** to indicate the applicant obtained a high school diploma.

Subject

Type the subject studied by this employee. This is an 18-character field that does not require pre-defined values.

Major

Type the academic major of this employee. This is an 18-character free-form field that does not require pre-defined values.

Minor

Type the academic minor of this applicant. This is an 18-character free-form field that does not require pre-defined values.

Rank

Type the academic class ranking of this applicant. This is a 4-character free-form field that does not require pre-defined values.

GPA

Type the grade point average of this applicant. This is a 4-character free-form field that does not require pre-defined values.

Skills

Type the code value that identifies the skill this applicant possesses. You define values for this field using code type **SKL**. If you use this field, you must also type information in the *Tasks* field.

Tasks

Type the code value that identifies the task this applicant can perform; generally the task will be related to the skill typed above. You define code values for this field using code type **TSK**.

Date Started

Type the date this applicant entered school or first acquired a skill.

Date Completed

Type the date this applicant completed his or her education or mastered a skill.

Reimbursement

If you use this screen to track information about your company's tuition reimbursement program, type the code value that represents the type of tuition reimbursement received by the employee. For example, you can define values such as **FULL** to represent full reimbursement or **50%** to represent 50% reimbursement. You define code values for this field using code type **REI**.

You normally also type information in the *School* and *Subject* or *Major* fields in the top portion of this screen.

Amount Reimbursed

Type the dollar amount of tuition reimbursement received by the employee. This is a 9-character numeric field with two decimal places.

Date Reimbursed

Type the date the employee received tuition reimbursement.

4 When you have typed all of the employee's education data, press F3 to exit from this screen and save the information you entered. You return to the Update Employee Education Data selection screen.

5 Select another record to update or press F3 to exit from this screen.

If you used the *Update Education Data* function to review the education data record, the system displays the prompt screen for the *Update Education Data* function. You can type the employee number of another employee whose education data information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the education data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-3. You can select additional information for the specified employee or press F3. When you select more than one function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Updating On-the-Job Training Data

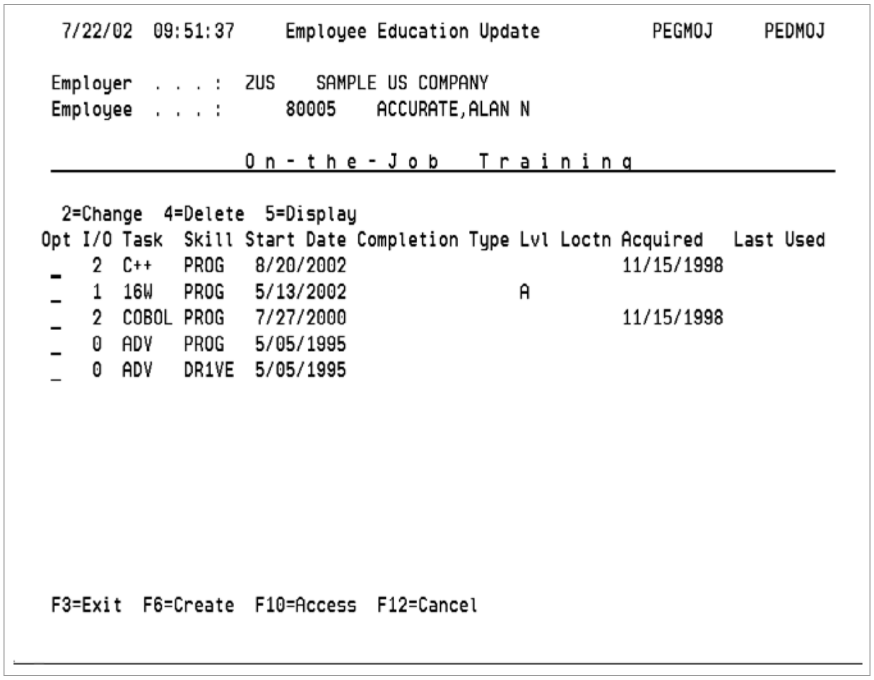
You use this function to record an employee's job-related skills and participation in training programs. You can indicate if the employee received training prior to employment, attended internal training while employed, or obtained training from an outside source while employed.

You can access the employee's Education Data - O.J.T. screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including the *Education Data - O.J.T.* function.
- Use the *Update On-Job Training Data* function on the Infinium HR main menu to directly access the On-the-Job Training information for the employee.

1. From the *Update Employee Data* prompt screen, select the *Education Data - O.J.T.* option and press Enter. The system displays the Employee Education Update selection screen as shown in Figure 10-5.

2. If you used the *Update On-Job Training Data* function from the Infinium HR main menu, complete the prompt screen. Press Enter. The system displays the Employee Education Update selection screen as shown in Figure 10-5.



```
 7/22/02  09:51:37     Employee Education Update          PEGMOJ     PEDMOJ

Employer  . . . :  ZUS     SAMPLE US COMPANY
Employee  . . . :      80005     ACCURATE,ALAN N

                   O n - t h e - J o b   T r a i n i n g

 2=Change  4=Delete  5=Display
Opt I/O Task  Skill Start Date Completion Type Lvl Loctn Acquired   Last Used
 _   2  C++   PROG   8/20/2002                           11/15/1998
 _   1  16W   PROG   5/13/2002                 A
 _   2  COBOL PROG   7/27/2000                           11/15/1998
 _   0  ADV   PROG   5/05/1995
 _   0  ADV   DR1VE  5/05/1995

F3=Exit  F6=Create  F10=Access  F12=Cancel
```

Figure 10-5: Employee Education Update On the Job Training selection screen

From here you can:

- Create a new on-the-job training record by pressing F6
- Update an on-the-job training record by typing **2** in an *Opt* field
- Delete an on-the-job training record by typing **4** in an *Opt* field
- Display an on-the-job training record by typing **5** in an *Opt* field

3 Press F6 to create a new on-the-job training record for this employee. The system displays the Update Employee On-the-Job Training screen shown in Figure 10-6.

```
 7/29/02  11:35:31   Create Employee On-The-Job Training   PEGMOJ2    PEDMOJ2

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005    ACCURATE,ALAN N

Skill Code  . . .  _____ +
Task Code . . . .  _____ +
Start Date  . . .  ________
Skill Acquired  .  _  (0=Internal 1=External 2=Pre-employment)
Completion  . . .  ________
Date Skill Acqrd.  ________
Last Used . . . .  ________
Skill Years . . .  ____
Program Type  . .  _ +
Level . . . . . .  __
Training Cost . .  __________
Location  . . . .  _____ +
Ranking/Score . .  ____
Supervisor  . . .  _________ +
Instructor  . . .  _________ +
Source  . . . . .  ______________________________

F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel
```

Figure 10-6: Education Update screen (On-the-Job Training)

4 Use the following information to fill in the fields on this screen:

Skill Acquired

Use this field to indicate when or how the employee obtained skills or training. You normally use the value **2** for applicants and values **0** and **1** for internal or external training for employees. Valid values are:

0	Internal Training
1	External Training
2	Prior to employment with the specified employer

Type the code value that identifies the skill the employee possesses. You define code values for this field using code type **SKL**. If you use this field, you must also type information in the *Task Code* field.

Task Code

Type the code value that identifies the task(s) the employee can perform; generally the task is related to the skill typed above. You define code values for this field using code type **TSK**.

Start Date

Type the date the employee started training on the skill typed above.

Completion

Type the date the employee completed training on the skill typed above.

Date Skill Acquired

Type the date the employee acquired the skill typed above.

Last Used

Type the most recent date this applicant used the skill typed above.

Skill Years

Type the number of years the employee has possessed the skill typed above. This is a 4-character free-form field that does not require pre-defined values.

Program Type

Type the code value that represents the kind of program in which the employee participated. You define 1-character code values for this field using code type **OJT**. For example, you can define a value of **T** to indicate technical programs and **J** to indicate journeyman level skills training.

The system uses this field to determine which employees should be included in the List EEO-2 Apprenticeship Data report within the *EEO/Affirmative Action* function. You must define a value of **A** and type it in this field if you want the employee to be included in the apprenticeship report. See the information on generating EEO Reports in the *Infinium HR Guide to Management Functions* for additional details.

Level

You can use this field to indicate the level of training or proficiency the employee has obtained. This is a 2-character free-form field.

If you typed **A** in the *Program Type* field and want the employee to be included in the List EEO-2 Apprenticeship Data report, you use this field to indicate the employee's status within the apprenticeship training program. Valid values for the report are:

A	Applicant for the apprenticeship training program
C	Completed the apprenticeship training program
D	Dropped out of the apprenticeship training program

Training Cost

Use this field to record the cost of the employee's training program. This is a 9-character numeric field with two decimal places.

Location

Type the code value that represents the employee's physical work location or where an internal training program was located. You define code values for this field using code type **LOC**.

Ranking/Score

You can use this field to record the employee's numeric score or ranking within a training class. This is a 4-character numeric field that does not require pre-defined values.

Supervisor

Type the employee number of the employee's supervisor. Press F4 to display a list of employees within the employee's employer code. Within the list of employees, locate the supervisor's name and type any character next to it. Then press Enter to fill the supervisor's employee number in this field.

Instructor

If the employee participated in an internal training program, type the employee number of the employee's training program instructor. Press F4 to display a list of employees within the employee's employer code. Within the list of employees, locate the instructor's name and type any character next to it. Then press Enter to fill the instructor's employee number in this field.

Source

Type the source of the employee's training related to the expertise identified in the *Skill Code* field on this screen. This is a 30-character free-form field that does not require pre-defined values.

5 Press Enter to store this information in the sub-file of this screen. If the employee possesses multiple skills, repeat steps 1 and 2 as many times as necessary.

6 After you type all of the skills possessed by the employee, press F3 to exit from this screen. You return to the Update Employee Education Data selection screen.

7 Select another record to update or press F3 to exit and save.

If you used the *Update On-Job Training Data* function to review the on-the-job training data, the system displays the prompt screen for the *Update On-the-Job Training Data* function. You can type the employee number of another employee whose on-the-job training data information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the on-the-job training data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-2. You can select additional information for the specified employee or press F3. When you select more than one function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Updating an Employee’s Previous Employment History

You use this option to record and maintain a history of an employee’s employment prior to joining your company.

You can access the employee’s Previous Employment History screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including previous employment history.
- Use the *Update Prev Employment History* function on the Infinium HR main menu to directly access the Previous Employment History screen.

1. From the *Update Employee Data* prompt screen, select the *Update Prev Employment History* option and press Enter. The system displays the employee’s previous employment history record as shown in Figure 10-7.

2. If you used the *Update Prev Employment History* function, follow the instructions on page 10-8 to complete the prompt screen. Press Enter. The system displays the employee’s previous employment history record as shown in Figure 10-7.

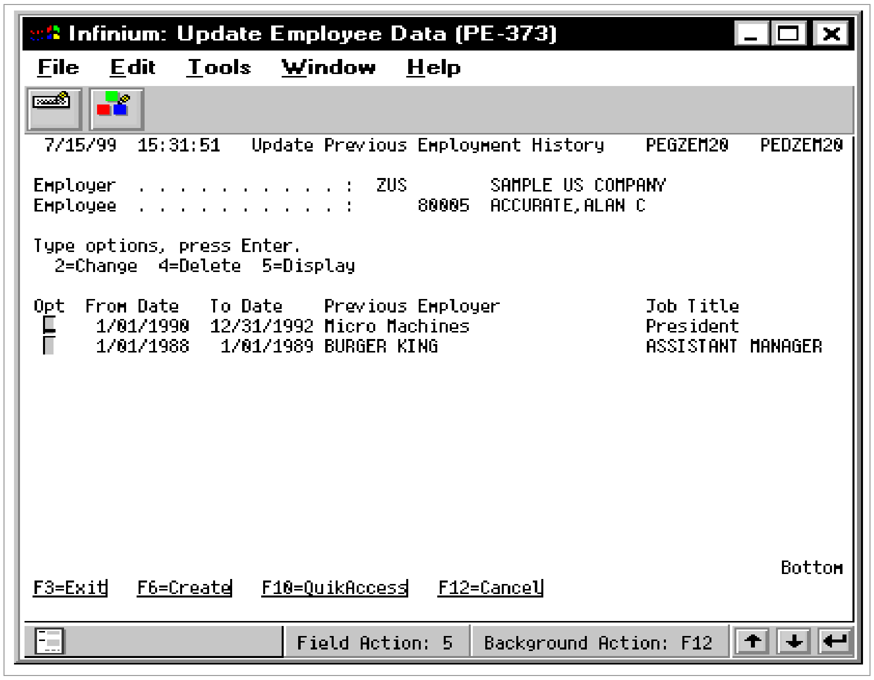


Figure 10-7: Update Previous Employment History selection screen

From here you can:

- Create a new previous employment record by pressing F6
- Update a previous employment record by typing **2** in an *Opt* field
- Delete a previous employment record by typing **4** in an *Opt* field
- Display a previous employment record by typing **5** in an *Opt* field

3 Press F6. The system displays the screen shown in Figure 10-8.

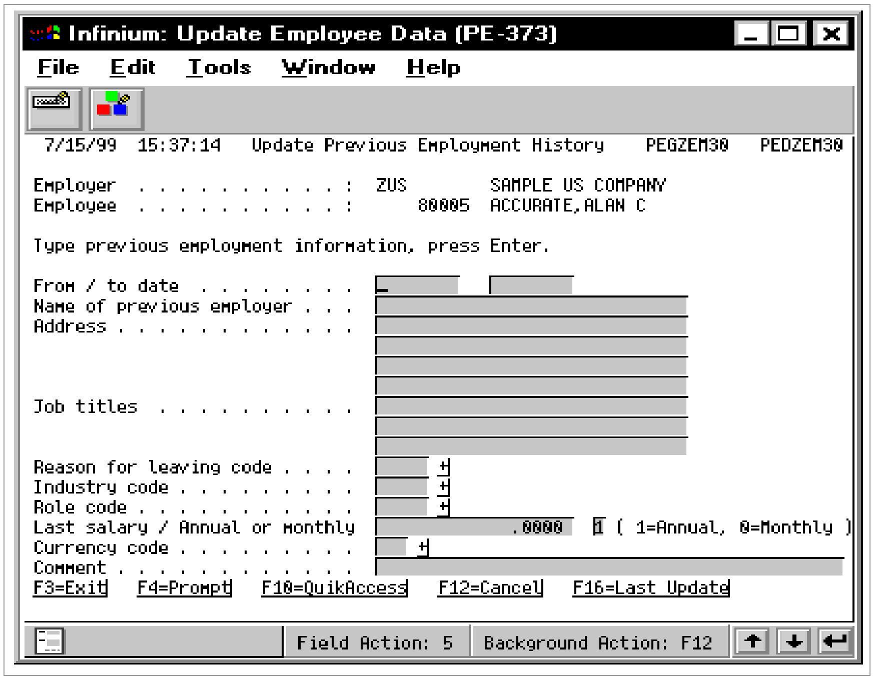


Figure 10-8: Update Previous Employment History screen

4 Use the following information to complete the fields on this screen:

From / to date

Type the dates on which the employee started and finished working at previous place of employment.

Name of previous employer

Type the name of the employee's previous employer.

Address

Type the address of the employee's previous employer.

Job titles

Type the title(s) of the job(s) the employee held while working for this employer.

Reason for leaving code

Type the code value that represents the reason the employee left this employer. You define code values for this field through the *Update Employer Codes* option, using code type **TRM**.

Industry code

Type the code value that represents the industry in which the employee worked. You define code values for this field through the *Update Employer Codes* option, using code type **IND**.

Role code

Type the code value that represents the role performed by the employee for this employer. You define code values for this field through the *Update Employer Codes* option, using code type **RLE**.

Last salary

Type the employee's last salary when working for this employer.

Annual or monthly

Type a value to indicate whether the employee's last salary is recorded as a monthly or annual amount. Valid values are:

0	The employee's salary is a monthly amount.
1	The employee's salary is an annual amount.

Currency code

Type the code value that represents the currency in which the employee's last salary from this employer is expressed. You define code values for this field through the *Update Employer Codes* option, using code type **CUR**.

Comment

Type any comments relevant to the employee's previous employment.

5 Press F3 to store this information in the sub-file of this screen. If the employee has multiple previous employers, repeat steps 3 through 5 as many times as necessary.

6 After you type all of the employee's previous employers, press F3 to exit from this screen.

If you used the *Update Prev Employment History* function to review the previous employment history, the system displays the prompt screen for the *Update Prev Employment History* function. You can type the employee number of another employee whose previous employment history information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the previous employment history record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-2. You can select additional information for the specified employee or press F3. When you select more than one function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Updating Property Data

You use this function to identify company property that has been issued to an employee. This information is especially useful in recovering company property when you terminate an employee.

You can access the employee's Property in Possession Data screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including the *Property in Possession* function.
- Use the *Update Property Data* function on the Infinium HR main menu to directly access the Property Data screen.

1 From the *Update Employee Data* prompt screen, select the *Property in Possession* option and press Enter. The system displays the Update Employee Property Issued selection screen as shown in Figure 10-9.

2 If you used the *Update Property Data* function from the Infinium HR main menu, complete the prompt screen. Press Enter. The system displays the Update Employee Property Issued selection screen as shown in Figure 10-9.

```
 7/22/02 10:19:21    Update Employee Property Issued      PEGMPP     PEDMPP

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005    ACCURATE,ALAN N

  2=Change  4=Delete
Opt  Code   Description         Issue Date   Suspense Date       Value
 _   AMEX   American Express     1/02/2001                          .00
 _   AT&T   Phone Card           1/02/2000                          .00
 _   AVIS   Car rental card      5/05/1999    5/05/2003          500.00
 _   AVIS   avis card            3/03/1997    3/03/1998    9,999,999.00
 _   CALC   HP-Wizard            2/19/1994                        30.00
 _   COMPU  Computer             5/13/1999    5/13/2002        1,500.00
 _   COMPU  Laptop computer      1/01/1997    1/01/1999        1,000.00
 _   KEY    Key for front door  10/15/2000                          .00





                                                                     Bottom
F3=Exit  F6=Create  F10=Access  F12=Cancel
```

Figure 10-9: Update Employee Property Issued selection screen

From here you can:

- Create a new property record by pressing F6
- Update a property record by typing **2** in an *Opt* field
- Delete a property record by typing **4** in an *Opt* field
- Display a property record by typing **5** in an *Opt* field

3 Press F6 to create a new property record for this employee. The system displays the Update Employee Education screen shown in Figure 10-10.

```
 7/22/02 10:22:59    Update Employee Property Issued      PEGMPP2    PEDMPP2

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :     80005    ACCURATE,ALAN N

Property Code . .  AMEX   +
Issue Date  . . .   1022001
Suspense Date . .  ________
Property Value  .  _______.00
Property ID # . .  ____________________
State . . . . . .  ___ +
Country . . . . .  ___ +
Description . . .  American Express
Text  . . . . . .
___________________________________________________________________________




F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel
```

Figure 10-10: Property Update screen

4 Use the following information to fill in the fields on this screen:

You must type information in the *Property Code* and *Issue Date* fields.

Property Code

Type the code value that identifies the company property item issued to the employee. You define code values for this field using code type **PRP**.

Issue Date

Type the date the employee was issued the company property identified above.

Suspense Date

You can use this field to record the date the employee was scheduled to return the company property or failed to return the property.

Property Value

Type the dollar value of the specified company property item. This is a 9-character numeric field with two decimal places. The greatest dollar value you can type is $999,999.99.

Property ID #

Type the identification number or serial number of the company property item possessed by the employee. This is a 20-character free-form field that does not require pre-defined values.

State

Type the code value that identifies the state in which the employee works. You define code values for this field using code type **STP**.

Country

Type the code value the represents the country in which the employee works. You define values for this field using code type **CTR**.

Description

Use this field to further describe the company property identified by the value in the *Property Code* field. This is an 18-character free-form field that does not require pre-defined values.

Text

Use this field to type additional information related to the company property identified by the value in the *Property Code* field. This is a 75-character free-form field that does not require pre-defined values.

5 After you type all of the skills possessed by the employee, press F3 to exit and save. You return to the Update Employee Property Issued selection screen.

If you used the *Update Property Data* function to review the employee's property data, the system displays the prompt screen for the *Update Property Data* function. You can type the employee number of another employee whose property data information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the employee's property data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-2. You can select additional information for the specified employee or press F3. When you select more than function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Updating Dependents/Beneficiaries Data

You use the *Update Dependents Data* function to record the names of the employee's dependents and beneficiaries along with their relationship to the employee and other optional information. You can use this information in the *Benefits Administration* function to identify the employee plans in which the dependent is covered or is a beneficiary.

You can access the Dependents/Beneficiaries Data screen in three ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including the *Dependent Data* function.
- Use the *Update Dependents Data* function on the Infinium HR main menu to directly access the Dependent Data screen.
- Use the *Update Employee Enrollments* function within *the Benefits Administration* option in Infinium HR. In Benefits Administration you associate each dependent or beneficiary with one or more of the employee's benefit plan enrollment records. See the *Benefits Administration Guide to Setup and Processing* for further information.

You can designate an employee's dependents and beneficiaries as inactive to indicate that the dependent or beneficiary is no longer eligible for enrollment in the employee's benefit plan. When you change the dependent's or beneficiary's status to inactive, they are no longer displayed in the employee's list of dependents and beneficiaries during the benefit enrollment process.

1 From the *Update Employee Data* prompt screen, select the *Dependent Data* option and press Enter.

If you use the *Update Dependents Data* function from the Infinium HR main menu, follow the instructions on page 10-8 to complete the prompt screen. Press Enter.

The Update Dependents/Beneficiaries screen is displayed, listing the employee's dependents and beneficiaries.

On this screen you can perform the following:

- Display both active and inactive dependents and beneficiaries.
- Change beneficiary or dependent information by typing **2.**

- Delete beneficiary or dependent information by typing **4**.
- Update alternate ID and name information by typing **6**.

  Use this action only when processing for localized situations, for example, Macau. See the *Guide to Localized Setup and Processing* for more information.

- Create new beneficiary or dependent information by pressing F6.

2 Use the information below to complete the information on the screen.

Include Inactive Dependents?

Specify whether to include only active dependents or both active and inactive dependents.

Valid values are:

0	Active only
1	Both active and inactive

3 Press F6 to create a new dependent or beneficiary record. The system displays the Update Dependents/Beneficiaries screen as shown in Figure 10-11.

```
 6/25/12  23:23:16      Create Dependents/Beneficiaries    PRGMDP2    PRDMDP2

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN


Name  . . . . . .  _______________________________________
- or - First Name  __________________  MI _   Last Name __________________
Active/Inactive?.  0  (0=Active 1=Inactive)
Relationship  . .  _____ +             Type  . . . . . . .  1  (1->2)

Date of Birth . .  _________           Tax ID# . . . . .  ___________
Student?  . . . .  0  (0, 1, 2)        Internal seq# .    012
Gender  . . . . .  _  (F, M, U)        User alpha  . .    _____
Disability  . . .  _                   User numeric  .    _______.00
Smoker? . . . . .  _

Address . . . . .  ______________________________
(Line 2)  . . . .  ______________________________
(Line 3)  . . . .  ______________________________


F3=Exit  F4=Prompt  F10=Access  F12=Cancel
```

Figure 10-11: Update Dependents/Beneficiaries screen

4 Use the following information to fill in the fields on this screen:

You can define many different types of benefit plans within the *Benefits Administration* function. As you enroll the employee in benefit plans, you can associate an employee's dependents with the appropriate plans.

There are two categories of dependents in the Benefits Administration option: true dependents and nominated beneficiaries. When you associate dependents with a benefit plan in which they are given insurance coverage, such as a medical plan, the dependent is referred to as a "dependent." If the plan has a defined monetary benefit that the employee's survivors receive upon the employee's death, such as a life insurance or a savings plan, the dependent is referred to as a "beneficiary." You use this screen for both categories of dependents.

You must type information in either the *Name* field or in the *First Name, MI, Last Name* and *Relationship* fields.

If you need to report name information to a vendor in first name, middle initial, last name or last name, first name, middle initial format, use the *First Name, MI and Last Name* fields. If you use the first name, middle initial, the order of the names depends upon your entry in the *Dependent Name* field on the benefit control.

If you do not need to include the first name, middle initial and last name, you may use only the *Name* field. For example, if the beneficiary is not a person but an organization or trust fund, you might only use the *Name* field.

If you enter information in the four fields, *Name, First Name, MI* and *Last Name*, the system uses the information as you enter it and does not use the information in the *Dependent Name* field on the benefit control.

Name

Type the name of the employee's dependent or insurance beneficiary. This is a 39-character free-form field that does not require pre-defined values.

or First Name, MI, Last Name

Type the first name, middle initial and last name of the employee's dependent or insurance beneficiary.

Active/Inactive?

Specify whether the dependent record is active or inactive. If you specify that the dependent is inactive, the dependent cannot be enrolled in a benefit plan.

Valid values are:

0	Active

1 Inactive

Relationship

Type the code value that identifies the way in which the beneficiary or dependent is related to the employee. You define code values for this field using code type **REL**.

Type

Type the value that indicates if person specified in the *Name* field is a true dependent (who may also be a beneficiary) or a nominated beneficiary. Generally, true dependents are family members claimed by the employee on his or her federal income tax return, such as a spouse and children under the age of 18. Nominated beneficiaries may include relatives, friends, charities or trusts established by the employee.

Valid values are:

1 True dependent who may also be a beneficiary

2 Nominated beneficiary

The List Employees Dependents report includes only those beneficiaries and dependents you designate as Type **1**.

Date of Birth

Type the dependent's date of birth. When you press Enter to save this information in the sub-file, the system automatically calculates the dependent's age.

Tax ID#

Type the Social Security Number or Social Insurance Number of the dependent.

Student?

You use this field to indicate if the dependent is a student. Valid values are:

0 No

1 Yes

Gender

Specify the dependent's or beneficiary's gender. Valid values are:

F	Female
M	Male
U	Unknown

User alpha

Type user defined alphabetical information you want to store for association with a dependent record. You can use this information with custom programs and queries. This information does not appear in any other function.

Disability

Specify the term of the disability for this dependent or beneficiary. Valid values are:

Blank	None
1	Short term disability
2	Long term disability
3	Total or permanent disability

User numeric

Type user defined numerical information you want to store for association with a dependent record. You can use this information with custom programs and queries. This information does not appear in any other function.

Smoker?

Specify whether this dependent or beneficiary is a smoker. Valid values are:

N	No
Y	Yes
Blank	Unknown

Address

Type the dependent's home address. This is a 30-character free-form field that does not require pre-defined values.

(Line 2)

Type the second line dependent's home address. This is a 30-character free-form field that does not require pre-defined values.

(Line 3)

Type the third line of the dependent's home address. This is a 30-character free-form field that does not require pre-defined values.

5 Press Enter to store this information in the sub-file. If the employee has multiple dependents, repeat step 2 as many times as necessary.

6 After you type all of the information for dependents associated with the employee, press F3 to exit.

If you used the *Update Dependents Data* function to review the employee's dependents data, the system displays the prompt screen for the *Update Dependents Data* function. You can type the employee number of another employee whose dependent data information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the employee's dependents data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-2. You can select additional information for the specified employee or press F3. When you select more than one function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Updating Automobile Data

You use this function to record information about the employee’s personal automobile including make, model, registration number and assigned parking lot and space, if applicable.

You can access the employee’s Automobile Data screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including the *Automobile Data* function.
- Use the *Update Automobile Data* function on the Infinium HR main menu to directly access the Automobile Data screen.

1 From the *Update Employee Data* prompt screen, select the *Automobile Data* option and press Enter. The system displays the employee’s automobile data information as shown in Figure 10-12.

2 If you used the *Update Automobile Data* function from the Infinium HR main menu, follow the instructions on page 10-8 to complete the prompt screen. Press Enter. The system displays the Update Employee Automobile Data selection screen. You can select employee automobile data to change, delete or display, or you can create new employee automobile data.

3 Type **2** next to the employee automobile data you want to change. The system displays a screen similar to Figure 10-12.

```
10/31/02 14:16:54   Update Employee Automobile Data      PEGAWM2    PEDAWM2

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005    ACCURATE,ALAN N

Auto Make . . . .  ALFAROMEO
Model . . . . . .  SPIDER 311
Color . . . . . .  BLACK
Year  . . . . . .  1998
License Plate#  .  5622FF
License State . .  RI  +    RHODE ISLAND
Permit# . . . . .  8944JJK
Registration# . .  6549873212
Parking Lot . . .  A1    +  MAIN FRONT LOT
Assigned Place  .  29
Issue Date  . . .   5052002




F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel
```

Figure 10-12: Update Employee Automobile Data screen

4 Use the following information to fill in the fields on this screen:

You must type information in the *Auto Make* and *Model* fields.

Auto Make

Type the name of the manufacturer of the employee’s personal automobile. For example, you can type **FORD** or **HONDA**. This is a 10-character free-form field that does not require pre-defined values.

Model

Type the specific model name of the employee’s automobile. For example, you can type **TAURUS** or **ACCORD**. This is a 20-character free-form field that does not require pre-defined values.

Color

Type the color of the employee’s automobile. This is a 6-character free-form field that does not require pre-defined values.

Year

Type the year the employee’s car was manufactured. This is a 4-character free-form field that does not require pre-defined values.

License Plate #

Type the employee's automobile license plate number. This is an 8-character free-form field that does not require pre-defined values.

License State

Type the code value that represents the state in which the employee's car is licensed. You define code values for this field using code type **STA**.

Permit #

Type the number of the employee's local municipal sticker or parking permit, if applicable. This is a 10-character free-form field that does not require pre-defined values.

Registration #

Type the employee's automobile registration number. This is a 20-character free-form field that does not require pre-defined values.

Parking Lot

Type the code value that identifies the parking lot to which the employee is assigned. You define code values for this field using code type **LOT**.

Assigned Place

Type the letters or numbers that identify the employee's assigned parking place. This is a 7-character free-form field that does not require pre-defined values.

Issue Date

Type the date the employee was issued the local parking permit or municipal sticker.

5 Press Enter to store this information in the sub-file of this screen. If the employee has more than one car, repeat step 2 as many times as necessary.

6 After you type all of the automobiles associated with the employee, press F3 to exit.

If you used the *Update Dependents Data* function to review the employee's automobile data, the system displays the prompt screen for the *Update Automobile Data* function. You can type the employee number of another employee whose automobile data information you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the employee's automobile data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-2. You can select additional information for the specified employee or press F3. When you select more than one function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Updating Employee Log Data

You use this function to type messages about an employee that you can send to yourself or another Infinium HR user. After you type the message, you can use the log messages as an electronic tickler file by accessing the *Display Ticklers* function.

You can access the employee's Log Data screen in two ways:

- Use the *Update Employee Data* function on the Infinium HR main menu; this option presents you with a selection screen containing ten options, from which you can select the option(s) you want to access, including the *Employee Log* function.
- Use the *Update Log Data* function on the Infinium HR main menu to directly access the Log Data screen.

1 From the *Update Employee Data* prompt screen, select the *Employee Log* option and press Enter. The system displays the employee's log data information as shown in Figure 10-13.

2 If you used the *Update Log Data* function from the Infinium HR main menu, follow the instructions on page 10-8 to complete the prompt screen. Press Enter. The system displays the employee's log data as shown in Figure 10-13.

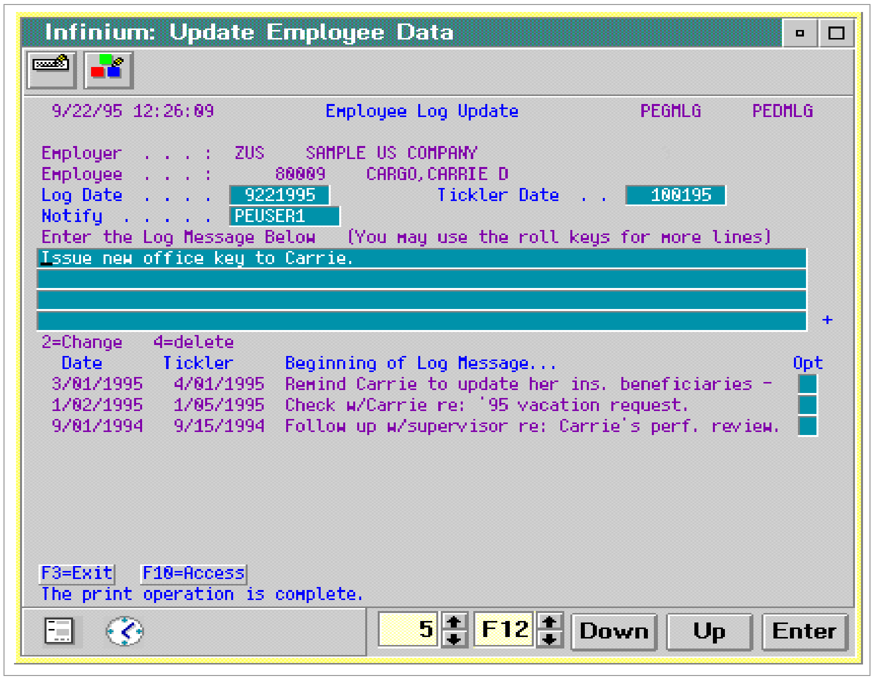


Figure 10-13: Employee Log Update screen

3 Use the following information to fill in the fields on this screen:

The only required field is the *Log Date* field.

Log Date

Type the date you are typing the log message on Infinium HR. The system defaults the AS/400 or iSeries system date into this field; however, you can override this date with any date of your choice.

Tickler Date

Type the date the system should notify you or another Infinium HR user to take action on the log message specified below.

Notify

Type the AS/400 or iSeries user profile to be notified about the log message specified below. You can type your own user profile or the AS/400 or iSeries profile of another Infinium HR user. If you leave this field blank, the system allows all Infinium HR users to display the log message specified below.

Log Message

Type the message about the specified employee. This is a 75-character free-form field that does not require pre-defined values. Press PgDn to display additional typing lines.

4 Press Enter to store the log message for the sub-file of this screen. If you want to type more than one log message for the employee, repeat step 2 as many times as necessary.

5 After you type all of the log messages for the employee, press F3 to exit.

If you used the *Update Log Data* function to review the employee's log data, the system displays the prompt screen for the *Update Log Data* function. You can type the employee number of another employee whose log messages you want to review or press F3 to return to the Infinium HR main menu.

If you used the *Update Employee Data* function to review the employee's log data record, the system displays the second prompt screen for the *Update Employee Data* function as shown in Figure 10-2. You can select additional information for the specified employee or press F3. When you select more than function from this screen initially, the system displays the first screen of the next function you specified and does not return to this prompt screen until you have reviewed all of your pre-selected options.

If you press F3 from this screen, the system displays the first prompt screen for the *Update Employee Data* function. You can type the employee number of another employee whose information you want to review or press F3 to return to the Infinium HR main menu.

Reviewing the Hire Transaction

The last option in the list on the *Update Employee Data* prompt screen is the *Enter Hire Transaction* option. This screen displays the information from the employee's new hire transaction. The system automatically creates this record whether you use the *Enter New Hire* function (in Infinium HR or Infinium PY) or the *Update Employee Data* function (in Infinium HR only) to hire employees.

You cannot access the Hire Transaction screen from the Infinium HR main menu. You can use the prompt screens from the *Update Employee Data* or *Enter Personnel Action* functions to review or update the hire transaction information.

You generally use the Hire Transaction screen only to review the new hire information. You cannot enter a new employee record using this screen. You can make changes to the information in this record under certain limited conditions. See the "Entering Personnel Actions" chapter for details.

See the "Updating Basic Data" chapter for more complete information regarding the fields on the *Enter Hire Transaction* record.

Follow these steps to access the Hire Transaction screen:

1 From the *Update Employee Data* prompt screen, select the *Enter Hire Transaction* option and press Enter. The system displays the employee's hire information as shown in Figure 10-14.

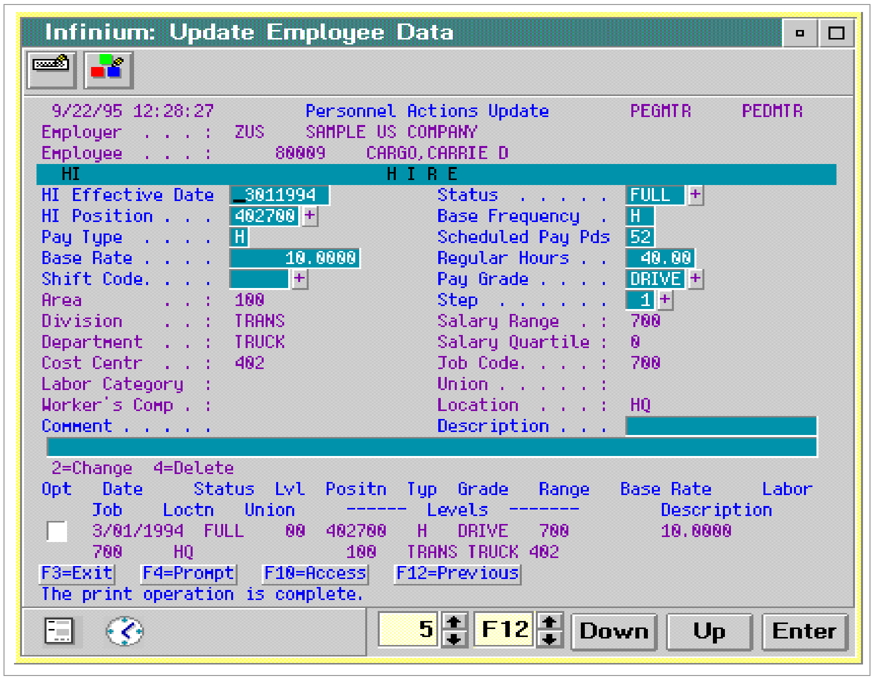


Figure 10-14: Hire screen

2 Use the following information to fill in the fields on this screen:

The *Enter Hire Transaction* option displays key information from the employee's new hire transaction. You use this option to review the new hire information. You do not use this screen to enter a new employee in Infinium HR.

Information from the employee's original *Enter New Hire* transaction is stored in the sub-file in the bottom portion of this screen. To review this information, move your cursor to the *Opt* field next to the lines of information. Type **2** in this field and press Enter. The system displays the information in the top portion of the screen.

You can type in some of the fields on this screen while other fields are protected from input. During the new hire transaction, information defaults into the protected fields from the new employee's assigned job and position.

HI Effective Date

This field displays the employee's original date of hire. The term **HI** refers to the new hire transaction within the *Enter Personnel Actions* function.

Status

The system displays the status code value assigned to the employee when hired in this field. You define code values for this field using code type **STS**.

HI Position

The system displays the code representing the position into which the employee was hired in this field.

Base Frequency

The information in this field describes the frequency of the employee's base rate of pay when hired. The employee's original base pay rate is displayed in the *Base Rate* field.

Valid values for this field are:

H	Hourly
D	Daily
W	Weekly
B	Bi-weekly
S	Semimonthly
M	Monthly
A	Annually
10	10 Pay Periods per Year
13	13 Pay Periods per Year
22	22 Pay Periods per Year
27	27 Pay Periods per Year
53	53 Pay Periods per Year

Pay Type

This field describes the way the employee's payroll rate(s) were stated when hired. Valid values for this field are:

H	Hourly employee
N	Salaried non-exempt employee
S	Salaried exempt employee

Scheduled Pay Pds

The system displays the number of pay periods per year in which the new employee was normally expected to be paid in this field. This field does not affect processing in Infinium PY.

Base Rate

The system displays the original base pay rate for the employee when hired in this field. The system uses the value in the *Base Frequency* field to interpret this rate.

Regular Hours

The system displays the employee’s normally scheduled hours per pay period when hired. This field is not used by Infinium PY in any payroll computations.

Shift Code

The system displays the code value indicating the shift to which the employee was assigned when hired. You define code values for this field using code type **SFT**. Infinium PY can use this code to calculate shift premiums during payroll cycle processing.

Pay Grade

The system displays the pay grade to which the employee was assigned when hired. You can use this field in step-in-grade processing on Infinium HR to automate the employee’s rate progression. See the “Establishing Step-in-Grade Processing” chapter for details.

Step

If you are step-in-grade processing for the employee, this field displays the step within the specified pay grade to which the employee was assigned when hired.

Levels 1, 2, 3, 4

The system uses these fields to display the codes representing the set of levels to which the new employee was originally assigned. These levels default from the employee’s assigned position during the new hire transaction.

Salary Range

The system displays the code representing the salary range to which the new employee was originally assigned in this field. This salary range code defaults from the employee’s assigned job during the new hire transaction.

Salary Quartile

The information in this field indicates the quarter of the salary range that contains the new employee's original base rate. The system automatically determines the employee's quartile during the new hire transaction.

Job Code

The system displays the job code to which the employee was assigned during the new hire transaction in this field. The job code is associated with the employee's position code.

Union

The system displays the code value representing the union to which the employee belonged when hired in this field. This field defaults from the employee's assigned position code. You define code values for this field using code type **UNI**.

Location

The system displays the code value representing the physical work location to which the employee was assigned when hired. This code value defaults from the employee's assigned position code. You define code values for this field using code type **LOC**.

Labor Category

The system displays the code value representing the labor group to which the employee was assigned when hired in this field. This value can default from the employee's assigned position code. You define code values for this field using code type **LAB**.

Worker's Comp

The system displays the code value representing the workers compensation category to which the employee was assigned when hired in this field. This code value defaults from the employee's assigned position code. You define code values for this field using code type **WCC**.

Comment

This is a 75-character free-form field that the system automatically associates with each personnel action, including the hire transaction. You cannot type into this field during the new hire transaction; however, you can type information into this field after you complete the hire transaction.

Description

This is an 18-character free-form field that the system automatically associates with each personnel action, including the hire transaction. You cannot enter information into this field during the new hire transaction; however, you can type information into this field after you complete the hire transaction.

3 After you review the employee's new hire transaction record, press Enter to return it to the sub-file of the screen. Then press F3 to exit from this screen.

If you have entered personnel actions for the employee since hired, the system generates the following warning message in a confirmation window:

> **A transaction exists in the future of this one. A transaction has been identified with a date in the future of the transaction you are entering. You may override this warning but be aware that the employee data will be updated by the future transaction NOT by this transaction. Press ENTER to accept the error or CANCEL to return.**

Press Enter to return the information to the sub-file of the screen and then press F3 to return to the second prompt screen for the *Update Employee Data* function. Press F3 two more times to return to the Infinium HR main menu.

Updating Eligibility Data

Caution: Employees and employers are responsible for ensuring that the completion and submission of I-9 information is in compliance with federal regulations.

You use the Eligibility Data screen to record information pertaining to the employee's legal right to work in the United States.

When you print the List Eligibility Data US report in Infinium HR, you can specify whether the report should include employees for whom you have employment eligibility information or for whom you do not have this information.

You can access the Eligibility Data screen during the hire transaction by pressing F8 from the second screen of the *Enter New Hire* function. After you hire the new employee, you can access I-9 information by using the *Update Eligibility Data (US)* function on the Infinium HR main menu.

Follow these steps to type or view the Eligibility Data screen.

1 From the Infinium HR main menu select *Employee Data.*

2 Select *Update Employee.*

3 Select *Update Eligibility Data (US)* [UI9]. The system displays the screen shown in Figure 10-15.

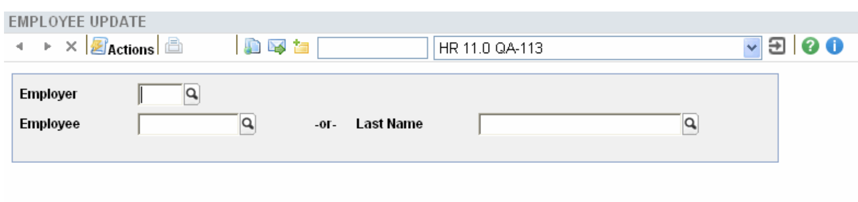


Figure 10-15: Employee Update prompt screen

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose employment eligibility information you want to view or update.

Employer

Type the code that represents the employer into which you hired the employee. Press F4 to display a list of valid employers.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee’s number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of the employee’s last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number and last name of the employee you selected.

See the “Displaying Employee Data” section of this chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee’s name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee’s entire last name, type as much as you know and press Enter. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5. After you fill in the employee number, press Enter. The system displays the screen shown in Figure 10-16.

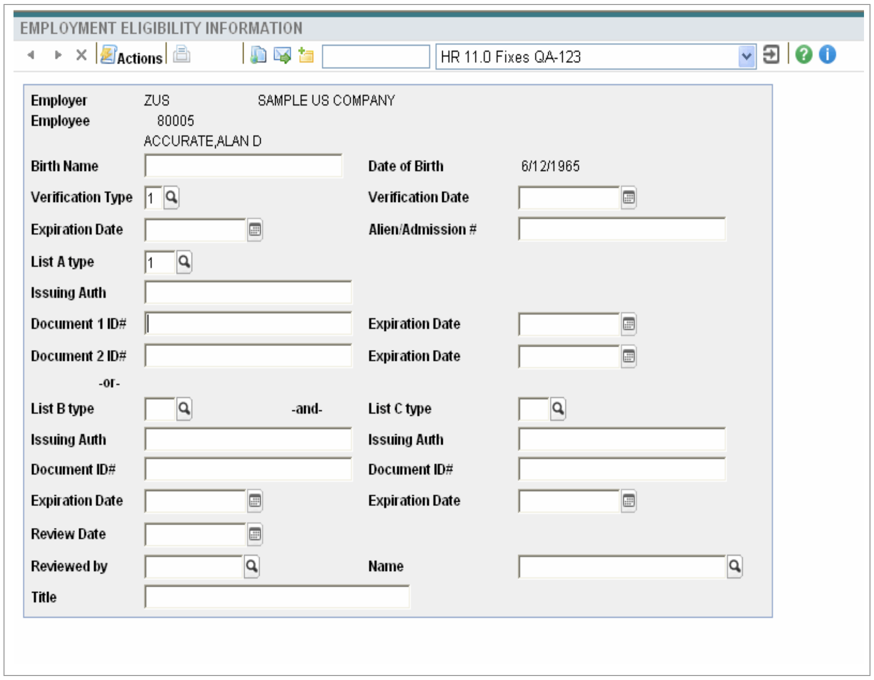


Figure 10-16: Employment Eligibility information screen

6 Use the following information to fill in the fields on this screen:

If you enter employment eligibility information for the employee during the *Enter New Hire* function, the system displays the information on this screen. You can view it or make changes to it.

If you did not enter employment eligibility information for the employee during the *Enter New Hire* function, you can type it now.

You must enter information in either the *List A type* field or in both the *List B type* and *List C type* fields. You must also enter information in the *Document ID#* field for the eligibility documents you specify.

Birth Name

Type the employee's name at birth or maiden name. This is a 39-character free-form field that does not require pre-defined values.

Verification Type

Specify the code value that identifies the eligibility verification for this employee. User code type the **VER** to define code values for this field.

Verification Date

Specify the date the employee and employer manually complete and sign the original I-9 information. The employer representative must verify that he or she has reviewed and recorded the information for the new employee's employment verification documents.

Expiration Date

If the employee is an alien authorized to work in the U.S. for a specified period of time, specify the date upon which the employee's work authorization document is no longer valid.

Alien/Admission #

If the employee is an alien authorized to work in the U.S. for a specified period of time, type the employee's alien identification number or admission number. This is a 19-character free-form field that does not require pre-defined values.

List A type

Specify the code value that identifies the documentation the employee presented to substantiate the employee's legal eligibility to work in the United States. These documents establish both identity and employment eligibility for the employee. If you type a value here, you cannot make entries in the *List B type* or *List C type* fields.

Use code type **LTA** to define values for this field.

Issuing Auth.

Type the name of the governmental agency that issued the documentation specified in the *List A type* field. This is a 19-character free-form field that does not require pre-defined values.

Document 1 ID#

Type the identification number associated with the document specified in the *List A type* field. This is a 19-character free-form field that does not require pre-defined values.

Caution: You cannot mask the information in this field.

If the employee's social security number is a valid value for this field, you can specify the employee's social security number as the tax ID, or you can provide an informational message such as "SSN on file."

Expiration Date

Type the expiration date of the document specified in the *List A type* field.

Document 2 ID#

Type the identification number of an alternate employment verification document presented by the employee that is included in the acceptable list A type documents. This is a 19-character free-form field that does not require pre-defined values.

Caution: You cannot mask the information in this field.

If the employee's social security number is a valid value for this field, you can specify the employee's social security number as the tax ID, or you can provide an informational message such as "SSN on file."

Expiration Date

Type the expiration date of the document specified in the *Document 2 ID#* field.

List B type

If you do not specify a value in the *List A type* field, you must specify a value in both the *List B type* and *List C type* fields.

Specify the code value that identifies the documentation the employee presented to substantiate the employee's legal eligibility to work in the United States. These documents establish the employee's identity. Use the **LTB** code type to define code values for this field, and use the **LTC** code type to define code values for the *List C type* field.

Issuing Auth.

Type the name of the governmental agency that issued the documentation specified in the *List B type* field. This is a 19-character free-form field that does not require pre-defined values.

Document ID#

Type the identification number associated with the document specified in the *List B type* field. This is a 19-character free-form field that does not require pre-defined values.

Caution: You cannot mask the information in this field.

If the employee's social security number is a valid value for this field, you can specify the employee's social security number as the tax ID, or you can provide an informational message such as "SSN on file."

Expiration Date

Type the expiration date of the document specified in the *List B type* field.

List C type

Specify the code value that identifies the documentation the employee presented to substantiate the employee's legal eligibility to work in the United States. These documents establish the employee's employment eligibility in the United States.

You use the **LTC** code type to define code values for this field, and you use the **LTB** code type to define code values for the *List B type* field.

Issuing Auth

Type the name of the governmental agency that issued the documentation specified in the *List C type* field. This is a 19-character free-form field that does not require pre-defined values.

Document ID#

Type the identification number associated with the document specified in the *List C type* field. This is a 19-character free-form field that does not require pre-defined values.

Caution: You cannot mask the information in this field.

You can specify the employee's social security number as the tax ID or you can provide an informational message such as "SSN on file."

Expiration Date

Type the expiration date of the document specified in the *List C type* field.

Review Date

Type the date the employer's representative reviewed the employee's documents and determined they were acceptable proof of the employee's legal eligibility to work in the United States.

Reviewed by

If the employer's representative who reviewed and accepted the new employee's employment eligibility documents is an employee of the specified employer, type that employee's employee number. Press F4 to display a list of employees within the specified employer.

Name

If the employer's representative who reviewed and accepted the new employee's employment eligibility documents is an employee of the specified employer and you typed his or her employee number in the *Reviewed By* field, leave this field blank. The system will default the name of the employer's representative in this field when you press Enter on this screen.

If the employer's representative who reviewed and accepted the new employee's employment eligibility documents is not an employee of the specified employer, type the employee's name in this field. This is a 19-character free-form field that does not require pre-defined values.

Title

Type the title of the employer's representative specified in the *Reviewed by* and/or *Name* fields. This is a 25-character free-form field that does not require pre-defined values.

7 After you complete all of the appropriate fields on this screen, you can press F8 to print a copy of the I-9 information. The system generates the screen print in your outque immediately. If your screen prints do not automatically print, access the Work with All spooled Files screen or the Work with Printer Output screen from the Infinium HR main menu to view or print the screen print.

8 Press Enter to save your I-9 information and exit from this screen. The system displays the prompt screen for the *Update Eligibility Data (US)* function. Type the employee number of the next employee whose employment eligibility data you want to update or press F3 to return to Infinium HR main menu.

Updating User-Defined Data

You use user-defined data to track employee information that is unique to your organization and not found in the Infinium HR database. You have the types and number of user-defined fields shown in the following table. The Screen No. column in the following table refers to the screen number in the *Update User Defined Data* function.

User Field Type	Field Descriptions	Screen No.
User-defined codes	Ten fields that validate against Code Types **UC1**, **UC2**, **UC3**, **UC4**, **UC5**, **UC6**, **UC7**, **UC8**, **UC9**, **UCX**	1
User-defined dates	Ten fields that accept dates	1
User-defined amounts	Ten 10-character numeric fields with two decimal places that accept numbers up to 9,999,999.99.	1
User-defined hours	Ten 8-character numeric fields with two decimal places that accept numbers up to 99,999.99.	2
User-defined character fields	Twenty 20-character fields that accept any combination of letters or numbers.	2
User-defined numeric fields	Ten 11-character numeric fields without decimal places that accept numbers up to 99,999,999,999.	3
User-defined comment field	One 100-character free-form field that accepts letters or numbers.	3

You use the *Update User Defined Titles* function within the *Update Master Files* option to type descriptions or labels for the user fields you want to utilize within a specified employer. For example, you type **PRIOR ER SVC DATE** next to the *Date 1 Name* field because you want to track the employee’s original date of hire with an employer that was subsequently purchased by your company. You type **PRIOR ER HRS WRKD** next to the *Amount 1 Name* field because you want to track the employee’s accumulated hours of work at the prior employer.

If you use the *Code Description* fields, you must define valid values for each field in advance using the *Update Employer Codes* function. You use code types **UC1 - UC9** and code type **USX**.

After you have labeled the fields, you use the *Update User Defined Data* function to type information in the user-fields for employees as needed. Infinium HR does not use or update these fields. You maintain them manually or with custom programs. You can use Infinium QY to develop reports on the information in these fields.

See the *Infinium HR Guide to Controls* for further details on establishing the user-defined fields.

Follow these steps to view or update the user-defined information for employees:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data.*
3. Select *Update User Defined Data* [UEU]. The system displays the screen shown in Figure 10-17.

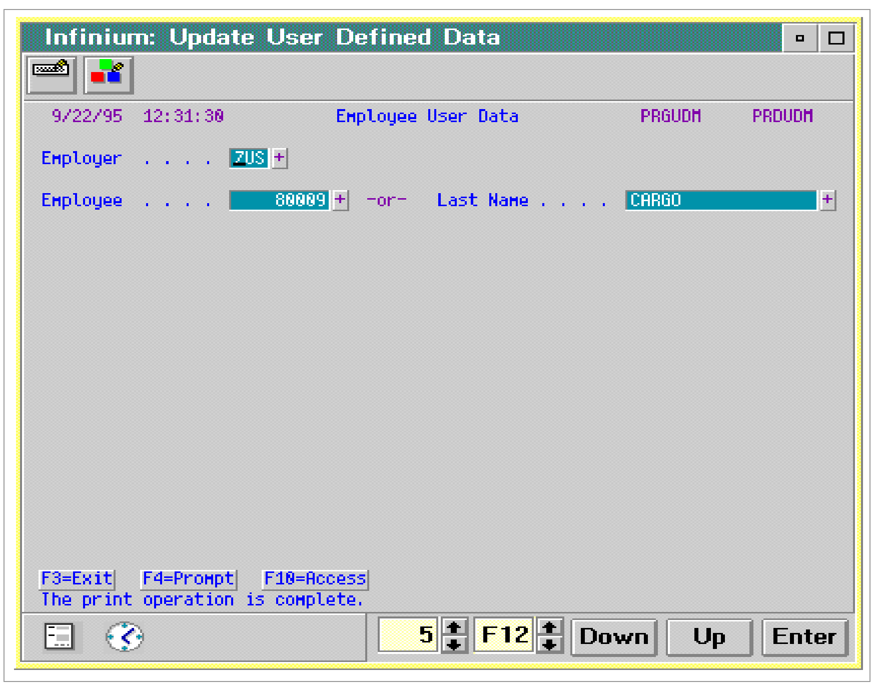


Figure 10-17: Employee User Data prompt screen

4. Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose user-defined information you want to view or update.

Employer

Type the code that represents the employer into which you hired the employee. Press F4 to display a list of valid employers.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of his or her last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number and last name of the employee you selected.

See the "Displaying Employee Data" section of this chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee's name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee's entire last name, type as much as you know and press F4. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5 After you fill in the employee number, press Enter. The system displays the screen shown in Figure 10-18.

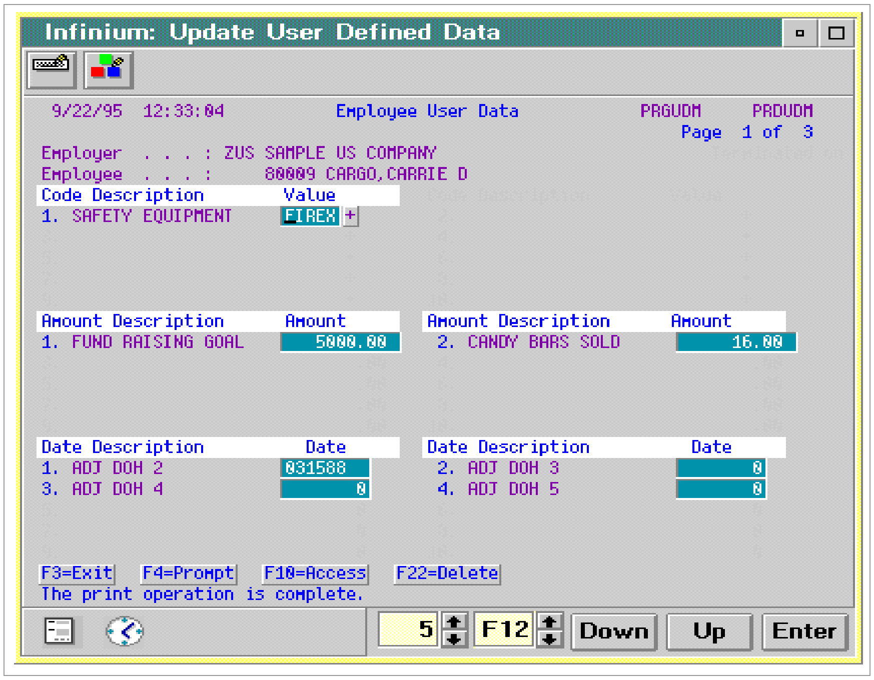


Figure 10-18: Employee User Data screen 1 of 3

6 Use the following information to fill in the fields on this screen:

The system displays the first of three user-defined data screens. You see those fields for which you previously typed descriptions using the *Update User Defined Titles* function. Since each customer site defines different descriptions for these user-defined fields, the following section uses generic field names.

Code Descriptions

The system displays up to 10 user-defined *Code Description* fields. You type a code value in the *Value* field next to each field description as needed for each employee. The system uses the following code types to validate your entry in these fields:

Code Description Number	Related Code Type
1	**UC1**
2	**UC2**
3	**UC3**
4	**UC4**
5	**UC5**
6	**UC6**

Code Description Number	Related Code Type
7	**UC7**
8	**UC8**
9	**UC9**
10	**UCX**

For example, you are a retail employer who provides employees with discounts on their purchases of your merchandise. Different types of employees are entitled to different types of employee discount plans.

You use the *Update User Defined Titles* function to label the *Code Description 1* field as **EE DISCOUNT PLAN**. You use the *Update Employer Codes* function to establish the following values for code type **UC1**: **FULL**, **10%**, **5%**. You use the *Update User Defined Data* function to specify the employee discount plan assigned to each eligible employee. You then use Infinium QY to develop a report that identifies and sorts employees by their assigned employee discount plan code value and distribute the report to your stores for their use.

Amount Descriptions

The system displays up to 10 user-defined *Amount Description* fields. You type a numeric value in the *Amount* field next to each field description as needed for each employee. You can type values up to 9,999,999.99. The system automatically displays two decimal places in this field.

Date Description

The system displays up to 10 user-defined *Date Description* fields. You type a date in the *Date* field next to each field description as needed for each employee.

7 When you have typed all of the information you require on this screen, press Enter to continue to the next screen in this sequence. The system displays the screen shown in Figure 10-19.

If you do not want to continue to the next two screens in this sequence, press F3. The system displays the Exit Options window. Type **1** to save your changes and press Enter. The system exits the screen and displays the prompt screen for the *Update User Defined Data* function.

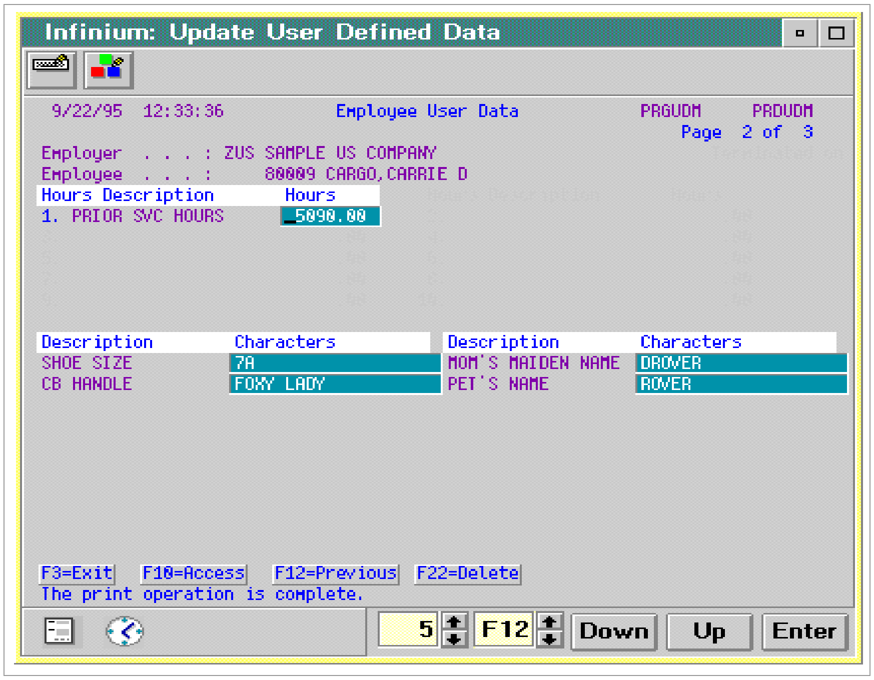


Figure 10-19: Employee User Data screen 2 of 3

8 Use the following information to fill in the fields on this screen:

The system displays the second of the three user-defined data screens. You see those fields for which you previously typed descriptions using the *Update User Defined Titles* function. Since each customer site defines different descriptions for these user-defined fields, the following section uses generic field names.

Hours Description

The system displays up to 10 user-defined *Hours Description* fields. You type a numeric value in the *Hours* field next to each field description as needed for each employee. You can type up to 99,999.99. This field automatically displays two decimal places.

Character Description

The system displays up to 20 user-defined *Character Description* fields. You type any alphanumeric information in the *Characters* field next to each field description as needed for each employee.

9 When you have typed all of the information you require on this screen, press Enter to continue to the next screen in this sequence. The system displays the screen shown in Figure 10-20.

If you do not want to continue to the next screen in this sequence, press F3. The system displays the Exit Options window. Type **1** to save your changes and press Enter. The system exits the screen and displays the prompt screen for the *Update User Defined Data* function.

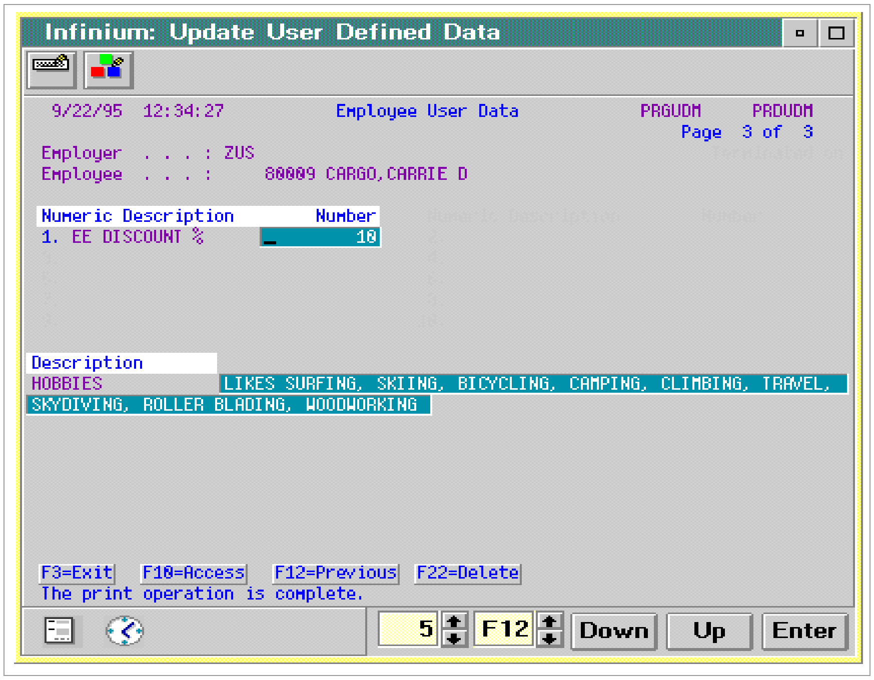


Figure 10-20: Employee User Data screen 3 of 3

10 Use the following information to fill in the fields on this screen:

The system displays the third screen of the three user-defined data screens. You see those fields for which you previously typed descriptions using the *Update User Defined Titles* function. Since each customer site defines different descriptions for these user-defined fields, the following section uses generic field names.

Numeric Descriptions

The system displays up to 20 user-defined *Numeric Description* fields. You type a numeric value in the *Number* field next to each field description as needed for each employee. You can type up to 99,999,999,999.

Description

Comment Field

The system displays the description you established for the *Comment* field. You can type up to 100 characters of information for each employee.

11 When you have completed the fields on this screen, press Enter to save your information. The system exits from this screen and displays the prompt screen for the *Employee User Data* function. You can type the employee number of the next employee for whom you want to type user-defined information or press F3 to return to the Infinium HR main menu.

Updating Foreign National Data

You use the *Foreign National Data* function to record information about an employee's salary history while he or she works for a foreign affiliate of his or her U.S. or Canadian employer. The information you type in this function does not transfer to the employee's basic data record and it is not used by Infinium PY to generate payroll checks.

Follow these steps to update an employee's foreign national data:

1 From the Infinium HR main menu select *Employee Data.*

2 Select *Update Employee Data.*

3 Select *Update Foreign National Data* [UFN]. The system displays the screen shown in Figure 10-21.

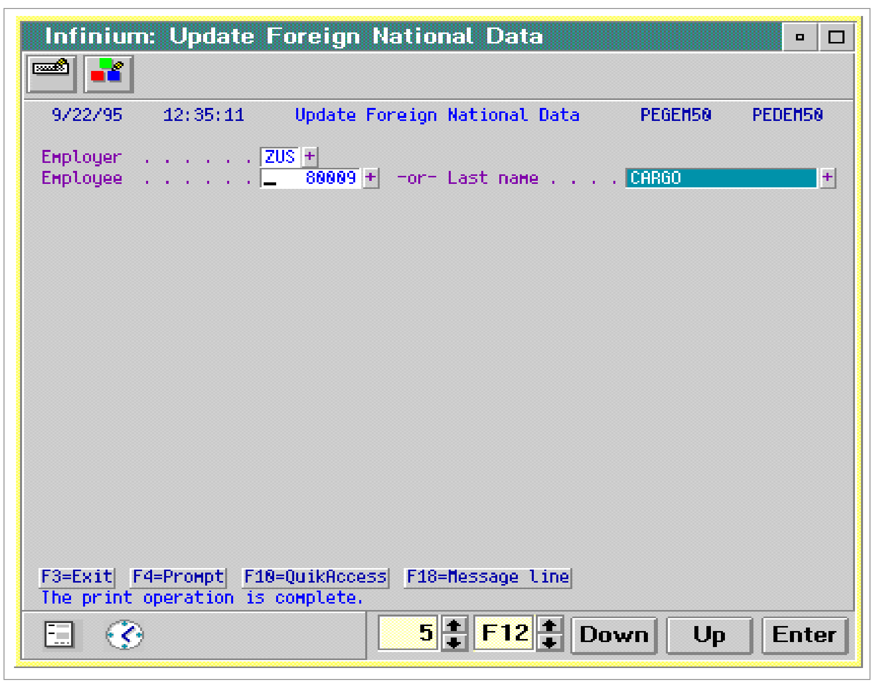


Figure 10-21: Update Foreign National Data prompt screen

4 Use the following information to fill in the fields on this screen:

You must specify the employer and employee number of the employee whose user-defined information you want to view or update.

Employer

Type the code that represents the employer into which you hired the employee. Press F4 to display a list of valid employers.

Employee

Type the number assigned to the new employee during the new hire process. If you do not know the employee's number, press F4 to display a list of all employees associated with the specified employer or use the *Last Name* field to find the employee number.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of his or her last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number and last name of the employee you selected.

See the "Displaying Employee Data" chapter for additional information on how to use the Employee Locate screen.

Last Name

Type the last name of the employee and press F4 to display the Employee Locate screen. The system displays the employee's name and number. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you specified.

If you do not know the employee's entire last name, type as much as you know and press Enter. The system displays employee(s) whose names match the letters or name you specified. Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the complete last name and employee number of the employee you selected.

5 After you fill in the employee number, press Enter. The system displays the screen shown in Figure 10-22.

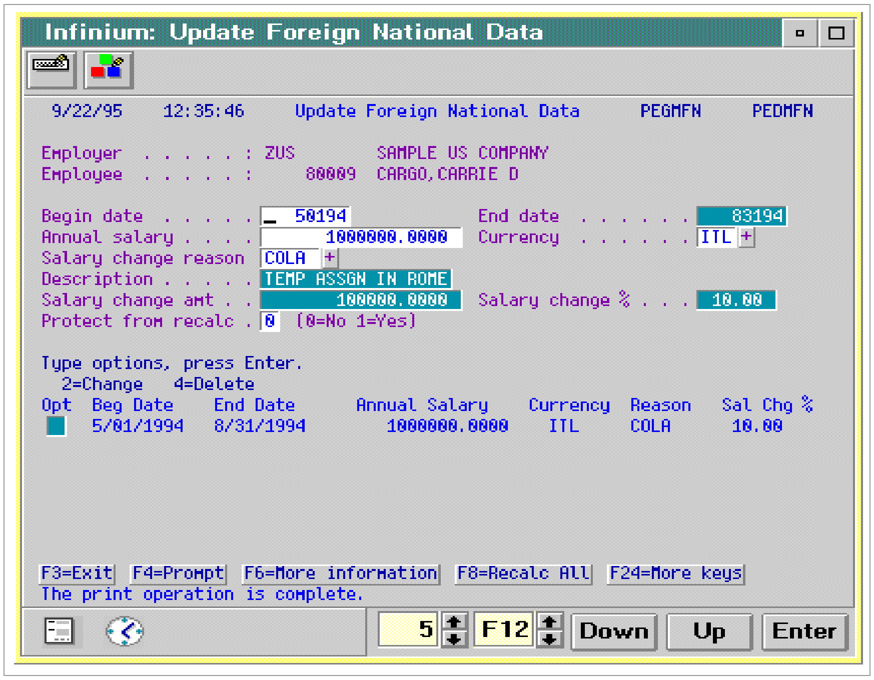


Figure 10-22: Update Foreign National Data screen

6 Use the following information to fill in the fields on this screen:

You must type information in the *Begin date, Annual salary, Currency* and *Salary change reason* fields.

Begin date

Type the date the employee began receiving his or her pay in the foreign currency and amount specified below.

End date

Type the date when the employee ceased receiving his or her pay in the foreign currency and amount specified below.

Annual salary

Type the employee’s annual salary in the appropriate foreign denomination. This is a 17-character numeric field with four decimal places.

Currency

Type the code value that identifies the foreign currency in which the employee is paid. You define values for this field using code type **CUR**. For example, you can define **JYEN** to indicate Japanese yen and **FFRANC** to indicate French francs.

Salary change reason

Type the code value that identifies why the employee received his or her salary change. You define values for this field using code type **SAL**.

Description

Type any additional information related to the employee's foreign assignment or salary. This is an 18-character free-form field that does not require pre-defined values.

Salary change amt.

Type the amount that represents the difference between the employee's current and prior foreign salaries.

Salary change %

Type the percentage that represents the difference between the employee's current and prior foreign salaries.

If in the sub-file of this screen the employee has at least one prior foreign national salary record with the same currency code as the information you are typing, you can use F8 to automatically calculate the salary change amount and percentage. After you press Enter to store the current foreign national salary information in the sub-file of this screen, press F8. The system calculates salary change amount and percent for all of the employee's foreign national salary records that do not have **1** in the *Protect from recalc* field.

Protect from recalc

Use this field to indicate if the system should automatically calculate or recalculate the *Salary change amt* and *Salary change %* fields for the current foreign national salary information when you press F8. When you press F8, the system automatically recalculates all of the foreign national salary records that are not protected from recalculation by this field.

Valid values are:

0	The system automatically calculates or recalculates the *Salary change amt* and *Salary change %* fields for this record when you press F8.

1	The system does not calculate or recalculate the *Salary change amt* and *Salary change %* fields for this record whenever you press F8. Type **1** if this is the first foreign national salary transaction for this employee or if the denomination of the current transaction is different from the most recent transaction.

7 When you complete all of the fields you require on this screen, press Enter to store your information in the sub-file of the screen. Repeat steps 6 and 7 to record additional foreign national salary transactions for the employee.

8 When you have typed all the information for the employee, press F3 to exit this screen. The system displays the prompt screen for the *Update Foreign National Data* function. Type the employee number of the next employee for whom you want to record foreign national data salary transactions or press F3 to return to the Infinium HR main menu.

Creating Emergency Contact Information

You use the *Update Emergency Contacts* function to record information about an employee's emergency contacts. You can add multiple contacts and designate one contact as the primary contact. You can specify whether the contact is active.

You can access the employee's Emergency Contacts screens through one of the following:

- Use the *Update Employee Data* function on the Infinium HR main menu and select the *Update Emergency Contacts* option.
- Use the *Update Employee* function on the Infinium HR main menu; select the *Update Employee Data* function, specify the employer and employee and select Personnel Data. Press F8 to access Emergency Contacts.
- Use the *Update Employee* function on the Infinium HR main menu and select the *Update Personnel Data* function, specify the employer and employee, advance to the second Update Personnel Data screen and press F9.

Follow these steps to create an employee's emergency contact information.

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data.*
3. Select *Update Emergency Contacts* [UECS]. The system displays the screen shown in Figure 10-23.

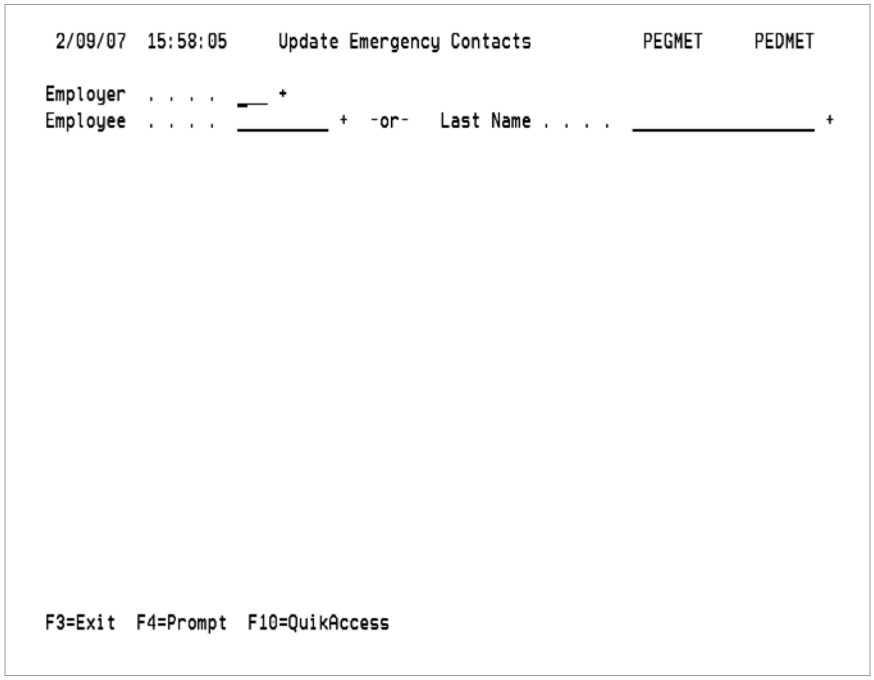


Figure 10-23: Update Emergency Contacts screen

4 Use the information below to fill in the fields on this screen.

Employer

Type the code that represents the employer for the employee for whom you are entering contact information.

Employee

Type the number assigned to the employee during the new hire process. You must enter a value in the *Employee* or *Last Name* field.

Last Name

Type the last name of the employee. You must enter a value in the *Employee* or *Last Name* field.

5 Press Enter. The system displays the Update Emergency Contact Data selection screen similar to Figure 10-24.

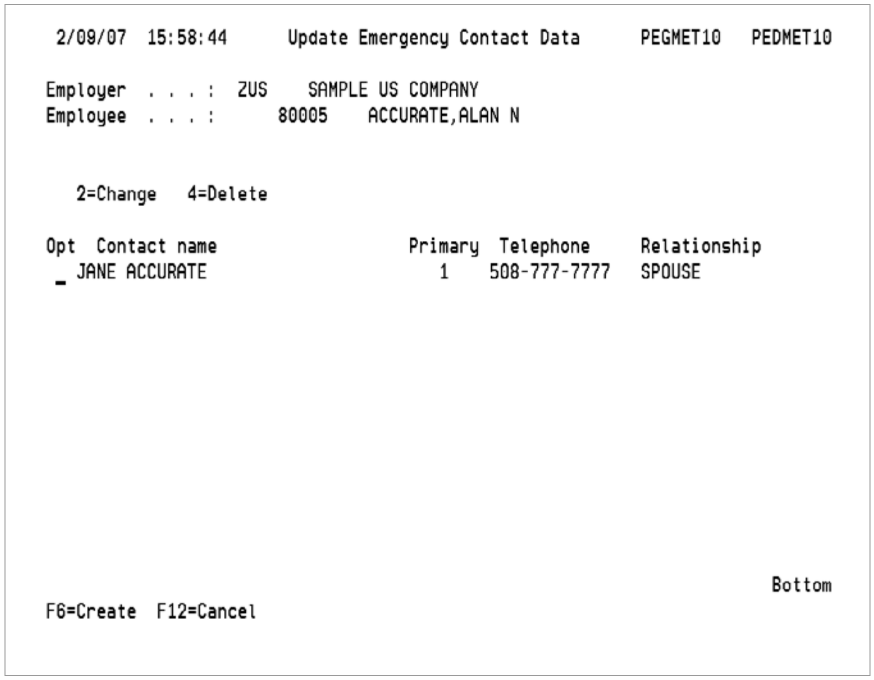
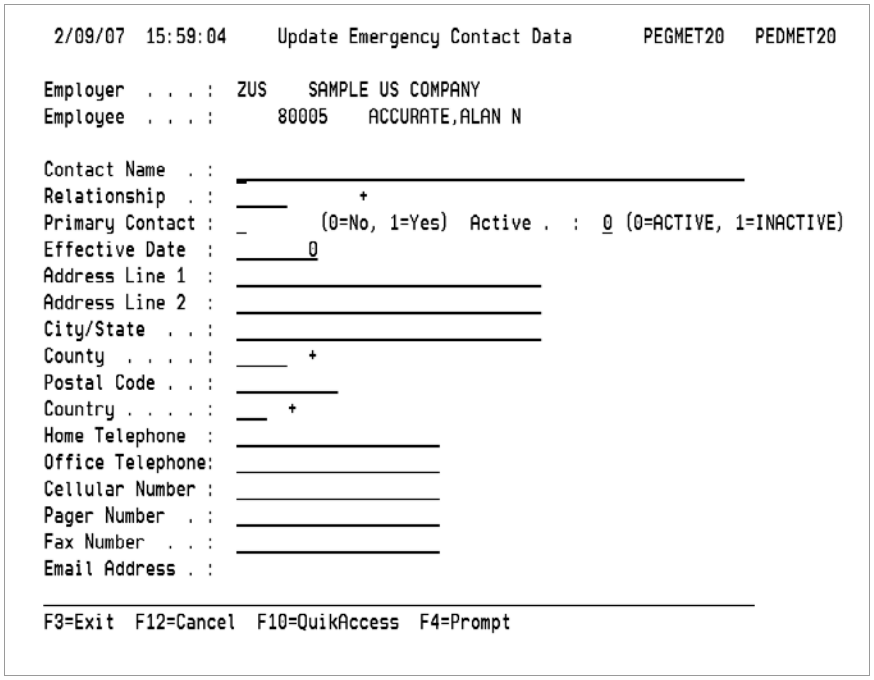


Figure 10-24: Update Emergency Contact Data selection screen

On this screen, you can:

- Create a new emergency contact record by pressing F6.
- Edit an existing emergency contact record by typing **2** next to the record.
- Delete an emergency contact record by typing **4** next to the record.

6 Press F6 to create an emergency contact. The system displays the Update Emergency Contact Data screen similar to Figure 10-25.



```
2/09/07  15:59:04    Update Emergency Contact Data     PEGMET20   PEDMET20

Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :     80005    ACCURATE,ALAN N

Contact Name  . :
Relationship  . :           +
Primary Contact :  _      (0=No, 1=Yes)  Active .  :  0 (0=ACTIVE, 1=INACTIVE)
Effective Date  :        0
Address Line 1  :
Address Line 2  :
City/State  . . :
County  . . . . :       +
Postal Code . . :
Country . . . . :     +
Home Telephone  :
Office Telephone:
Cellular Number :
Pager Number  . :
Fax Number  . . :
Email Address . :

F3=Exit  F12=Cancel  F10=QuikAccess  F4=Prompt
```

Figure 10-25: Update Emergency Contact Data screen

7 Use the information below to complete the fields on this screen.

Contact Name

Type the name of the contact.

Relationship

Specify the relationship of the contact to the employee.

Primary Contact

Specify whether this is the primary contact. Valid values:

0	No, this is not the primary contact.
1	Yes, this is the primary contact.

Only one emergency contact can be the primary contact.

Active

Specify whether this contact is currently available.

0	No, this contact is not currently active or available.

1	Yes, this contact is currently active and available.

Effective Date

Specify the date when this contact is available.

Address Line 1

Type the first line of this contact's address.

Address Line 2

Type the second line of this contact's address.

City/State

Type the city and state of this contact's address.

County

Type the county of this contact's address.

Postal Code

Specify the postal code for this contact's address.

Country

Specify the country of this contact's address.

Home Telephone

Type this contact's home phone number.

Office Telephone

Type this contact's office phone number.

Cellular Number

Type this contact's cell phone number.

Pager Number

Type this contact's pager number.

Fax Number

Type this contacts fax number.

Email Address

Type this contact’s e-mail address.

8 Press F3.

9 Save and exit.

10 Press F3 twice to return to the main menu.

Chapter 11 Changing Employee Data

11

This chapter describes additional ways you can work with employee information.

The chapter consists of the following topics:

Overview of Additional Ways to Work with Employee Information

In this chapter you learn about additional ways to work with employee information. Unlike the functions you learned about in the preceding "Updating Employee Data" chapter, the functions you study in this chapter are not commonly used functions. However, they provide quick and easy solutions when you encounter the problematical circumstances for which they were designed.

The first function you learn about in this chapter allows you to change an employee's number. You or the system assigns a number to each employee during the new hire process. The system uses the employee number to locate the employee's information. You cannot manually change this number. However, if necessary, you can use the *Change Employee Number* function to programmatically change this number.

If you type **1** in the *Position File Used?* field on the employer control record, many of the fields in the employee basic data record are automatically filled with information that defaults from the position and job controls to which the employee is assigned. If you make changes to these controls after the employee has been hired and you want the employee record to be updated accordingly, you can use the *Mass Update Employee Position Data* function to automatically refresh those fields in the employee basic data record that default from the job and position controls.

You can use the *Mass Update Supervisor* function to change supervisor information in the employee basic data information of specified employees. The *Mass Update Supervisor* function generates an audit report for your records.

After you use Infinium HR for several years, you may accumulate many terminated employees in your database. You can use the *Purge Terminated Employees* function to remove almost all of the information for specified terminated employees. After you use the *Purge Terminated Employees* function, the system retains a skeletal record of basic information about the purged employees that you can display or print.

Objectives

After completing this chapter, you should be familiar with how to:

- Change an employee number
- Automatically update default information in employee basic data records
- Mass update supervisor information
- Purge the records of terminated employees

Changing an Employee Number

During the *Enter New Hire* function, either you or the system assigns a number to each new employee. The system uses the employer code and employee number to locate employees in your database. The employee number must be unique within each employer. In other words, within Company ABC, you can only have one person with employee number 100.

If you need to change the employee's number after the employee has been hired, you use the *Change Employee Number* function. This function will change the employee's number in Infinium HR and Infinium PY. It will affect all of the employee's records including personnel actions history, payroll history and benefits history. You can use this function immediately after you hire a new employee or many years later.

Using the Change Employee Number Function

When you use the *Change Employee Number* function, the system uses interactive processing to immediately update the employee's three master records with the new employee number. The master records include basic data, personnel data and payroll data. The system then updates the rest of the employee's records using batch processing.

The length of time the system takes to process the *Change Employee Number* job depends on the number of records that exist for the specified employee. Generally, employees with greater lengths of service have more records in the Infinium HR database; therefore, the system needs more time to process the *Change Employee Number* function.

There are some files in the database that the system cannot update with the new employee number. These include embedded references to the employee number that are in another employee's record. For example, when you type a performance review transaction within the *Enter Personnel Actions* function for an employee, you specify the employee number of the employee's supervisor in the *RE Employee* field. The *Change Employee Number* function does not update the *RE Employee* field.

When you execute the *Change Employee Number* function, you must ensure that no other Infinium HR or Infinium PY users are updating or accessing any records for the employee whose number you are changing. The employee should not be included in any open payroll cycles. If another person is currently working in one of the employee's records, the *Change Employee*

Number function skips that record and the employee number on it is not changed. The system identifies this record with an error message on the audit report described below.

As the system processes the *Change Employee Number* function, it produces an audit report so that you can review the employee records that were updated with the new employee number. Each applicable file in the database is listed and the report indicates how many records within each file were changed for the specified employee. The system does not update work files or purged employee data files. The report indicates records that could not be processed with an error message.

Follow the steps below to use the *Change Employee Number* function.

1 From the main menu select *System Operations.*

2 Select *Supervisor's Functions.*

3 Select *Miscellaneous Operations.*

4 Select *Change Employee Number* [CHGEENUM]. The system displays the screen shown in Figure 11-1.

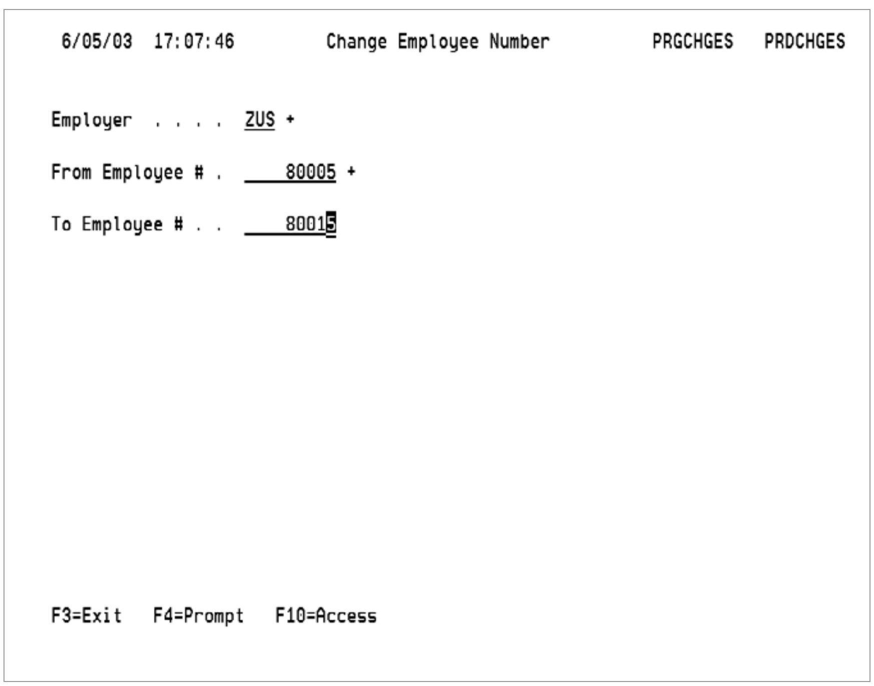


Figure 11-1: Change Employee Number screen

5 Use the following information to fill in the fields on this screen:

You must specify the employer, old employee number and new employee number for the employee whose number you want to change.

Employer

Type the code that represents the employer to which the employee is currently assigned. Press F4 to display a list of valid employers.

From Employee #

Type the number currently assigned to the employee. If you do not know the employee's current number, press F4 to display a list of all employees associated with the specified employer.

When you press F4, the system displays the Employee Locate screen. To locate a specific employee, type some or all of the employee's last name on the blank line adjacent to the *Locate* field on the Employee Locate screen and press Enter. The cursor moves to the employee(s) whose name matches the letters or name you specified.

Type any character in the *Opt* field next to the employee you want to update or view and press Enter. The system returns to the prompt screen and automatically fills in the employee number of the employee you selected.

See the "Displaying Employee Data" chapter for additional information on how to use the Employee Locate screen.

To Employee #

Type the new employee number you want to assign to this employee. You must type a number that is unique within the specified employer. If you inadvertently type a number that is already assigned to another employee within the specified employer, the system produces the following error message:

Employee number already exists.

6 After you fill in the employee number, press Enter. The system displays the following message:

Please verify that the FROM and TO Employee Numbers entered are correct.

Press F16 to update primary master files and submit batch update for all other files.

7 After you verify that you have typed the correct old and new employee numbers, press F16 to begin the *Change Employee Number* function.

If you want to retype the old or new employee numbers on this screen, press F3. The system exits from this screen and displays the Infinium HR main menu. Repeat steps 1 through 5 to execute the *Change Employee Number* function with different employee numbers.

You must press F16 to execute the *Change Employee Number* function

8 After you press F16, the system displays the Infinium HR main menu. To review the status of the *Change Employee Number* job and the associated audit report, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen.

Using Mass Update Employee Positions

When you type **1** in the *Posit. File Used?* field on the employer control record, the system protects certain fields in the basic data records of employees in that employer from input. The information in these fields defaults from the position and job assignments of each employee when the employee is hired or moved into a new position. You use the transfer, promotion, demotion and rehire transactions with the *Enter Personnel Actions* function to move the employee from one position to another after he or she is hired.

The system defaults information into certain other fields in the employee basic data and personnel data records; however, they are not protected from manual update. In other words, you can make changes to the information in these fields by typing in them.

The following table lists the fields in the basic data and personnel data records whose information automatically defaults from the employee's assigned position or job controls. Fields that are protected from manual update are shown in bold type.

Field Name	Location	Source
Level 1, 2, 3, 4 *Location*	Basic Data Screen 1	Position Control
Position *Position Title* *Job Code 1* *Union* *Shift* *Benefit Group*	Basic Data Screen 2	Position Control
EEO Category	Basic Data Screen 2	Job Control or Position Control
EEO-4 Function	Basic Data Screen 2	Job Control
Security Group	Basic Data Screen 3	Job Control
Workers Comp. *Labor Category*	Basic Data Screen 3	Position Control

Field Name	Location	Source
Pay Type *Pay Grade** *Pay Grade Date* *Step* *Step Date* *Next Step*** *Next Step Date*** *Freeze Step?*** *Step Override?*** *Salary Range* *Salary Quartile* *Comp Ratio*	Basic Data Screen 4	Job Control
Season	Personnel Data Screen 1	Position Control

* This field is protected only if you are using step-in-grade processing.
** These fields are protected only if you are not using step-in-grade processing.

If you change information on the job or position control record that updates a protected field in the basic data record of employees assigned to that job or position control, the system automatically updates the field(s) in the basic data record when you press Enter on the job or position control record. However, the system does not generally update the non-protected fields in the same manner.

The system automatically updates the following fields in the basic data record when you change the related information on the position or job control record:

- *Levels 1, 2, 3, 4*
- *Location*
- *Job Code 1*
- *Location*
- *Position*
- *Position Title*
- *EEO Category*
- *EEO-4 Function*
- *Union*
- *Labor Category*

- *Workers Comp.*
- *Salary Range*

If you make changes to the other fields shown in the preceding table, the system does not automatically update the employee records with the new information. You use the *Mass Update Employee Positions* function to update employee basic data and personnel data records with the new information.

In addition to refreshing the basic data fields identified in the preceding table, the *Mass Update Employee Positions* function updates the *Comp Ratio* and *Salary Quartile* fields on the fourth screen of the basic data record. It recalculates the comp ratio by dividing the employee's base rate into the midpoint of his or her assigned salary range. It determines the appropriate quartile for the employee by comparing his or her base rate to the salary range, which is divided into quarters. See the preceding "Updating Employee Data" chapter for a complete explanation of how the system determines salary range quartiles.

If you change the level assigned to a position control, the system updates the personnel actions file, PEPTR, with the new level information when you use the *Mass Update Employee Positions* function. When the next personnel action occurs following this update, the system uses the updated level information in the personnel actions file.

Step-in-Grade Employees

The *Mass Update Employee Positions* function also updates the following fields in the fourth screen of basic data for employees whose pay rate progression you administer though the step-in-grade processing function in Infinium HR. You identify step-in-grade employees by assigning them to a job control on which you type **1** in the *Step-in-Grade?* field.

These fields are updated only for new step-in-grade employees. For example, if you are implementing step-in-grade processing at your location, you can use the *Mass Update Employee Positions* function to initialize the step-in-grade fields in basic data for each affected employee. See the "Using Step-in-Grade Processing" chapter for more information.

- *Pay Grade*
- *Pay Grade Date*
- *Step*
- *Step Date*
- *Next Step*

- *Next Step Date*
- *Step Override*
- *Freeze Step*

The system checks the *Step-in-Grade?* field on the employee's assigned job control record to determine if the employee participates in step-in-grade processing. If you type **1** in the *Step-in-Grade?* field, you assign a pay grade to the job control record. If the employee's step-in-grade fields in basic data are blank, the system uses the pay grade control record and the employee's *Base Rate* field in the basic data record to determine to which step the employee should be assigned, his or her next step and the related effective dates.

This function does not update the *Base Rate* field in basic data or the *Payroll Rate*(s) fields in payroll data for step-in-grade employees. However, the audit report indicates the expected rate change that will occur if you use the *Mass Update Employee Step Rates* function to update the employee's rates based on the pay grade to which he or she is assigned.

You use the *Trial Update Employee Positions* function to preview the changes the system will make to employee records when you use the real function. The employee records are not updated until you execute the *Mass Update Employee Positions* function.

As the system processes both the *Trial* and *Mass Update Employee Positions* functions, it produces two audit reports of the fields it does update or will update in the employee basic data record. The first report details the changes made to fields in the basic data records of affected employees. The second report identifies changes to the step-in-grade fields of affected employees. These audit reports are the only record you receive of the changes the system makes when you use this function. The system does not create historical records in Infinium HR of the changes made for employees.

Using Trial Update Employee Positions

Follow the steps below to use the *Trial Update Employee Positions* function.

1. From the main menu select *System Operations.*

2. Select *Personnel Init. Functions.*

3. Select *Position Data.*

4. Select *Trial Update Employee Positions* [TUEPD]. The system displays the Trial Update Employee Positions screen similar to Figure 11-2.

```
 6/05/03 17:10:28     Trial Update Employee Positions      PEGJC50    PEDJC50

Employer  . . . .  ___ +      -or-     Employer Group  .  ____ +

SIG Date Source .  _  (1->5)  -or-     Step-in-Grade Dt.  ______0
Update title? . .  0  (0=No 1=Yes)     Lvl Trans Reason.  ____ +
Include Term.?  .  _  (0=No 1=Yes)     Description . . .  ______________
Comment . . . . .  ________________________



F3=Exit   F4=Prompt   F10=Access
```

Figure 11-2: Trial Update Employee Positions screen

5 Use the following information to fill in the fields on this screen:

You can update the basic data records of employees within a specified employer, or you can update the records of employees within all of the employers included in the specified employer group.

You must make an entry into either the *Employer* or *Employer Group* fields. All of the other fields on this screen are required.

Employer

Type the value that represents the employer from whom you want to update employee basic data records. Press F4 to display a list of valid employers. You must make an entry in this field in the *Employer Group* field.

Employer Group

Type the code value that identifies the group of employers for when you want to update employee basic data records. The system updates records for employees in all of the employers included in the specified employer group. You must make an entry in this field or in the *Employer* field.

You use code type **ERG** to define employer groups; you use the *Update Employer Groups* function within the *Update Master Files* option to assign employers to an employer group. See the *Infinium HR Guide to Controls* for further information on defining employer groups.

SIG Date Source

You use this field to identify the date the system uses to fill the *Pay Grade Date* and *Step Date* fields for new step-in-grade employees. The system also uses this date along with specifications on the pay grade control record to update the employee's *Next Step Date* field. The system does not update these fields for employees who are not included in step-in-grade processing. You identify step-in-grade employees by assigning them to a job control on which you typed **1** in the *Step-in-Grade?* field.

Valid values are:

1	Date of Hire
2	Adjusted Date of Hire
3	Job Seniority Date (The system uses the first *Seniority Date* field in basic data.)
4	Last Rate Change Date (The system uses the *Last Increase* field in basic data.)
5	Today's Date (This means the system date on which you execute this function.)
Blank	The system uses the date you specify in the *Step-in-Grade Dt* field.

The system stores the *Date of Hire*, *Adjusted Date of Hire*, *Seniority Date* and *Last Increase* fields in the employee basic data record. All employees should have information in two of these fields, the *Date of Hire* and *Seniority Date* fields.

If you type **2** in the *SIG Date Source* field and a new step-in-grade employee does not have information in the employee's *Adjusted Date of Hire* field, the system uses the information in the employee's *Date of Hire* field instead.

If you type **4** in the *SIG Date Source* field and a new step-in-grade employee does not have information in the employee's *Last Increase* field, the system does not update the employee's step-in-grade fields and produces the following warning message under that employee's name on the audit report:

NO STEP-IN-GRADE EXISTS FOR SPECIFIED EFFECTIVE DATE -NO UPDATE PROCESSED

Step-in-Grade Dt

If you leave the *SIG Date Source* field blank, type the date the system should use to initialize the *Pay Grade Date*, *Step Date* and *Next Step Date* fields in the basic data records of new step-in-grade employees.

Update title?

You use this field to indicate whether the system should update the *Position Title* field in the employee basic data record. The system normally defaults information into this field from each employee's assigned position control; however, you can manually update the *Position Title* field. If you type **1** in this field, the system updates this field and standardizes the title of employees assigned to the same position code.

Valid values are:

0	Do not update the *Position Title* field in each employee's basic data record with the title specified on the employee's position control record.
1	Update the *Position Title* field in each employee's basic data record with the title specified on the employee's position control record.

Lvl Trans Reason

Infinium HR creates a transfer (TR) personnel transaction record for each employee with a level or job change. The system uses the value you type in this field to update the *TR Reason* field on each transaction record associated with this position. The system does not retain the value you type in this field.

Specify the value that represents the reason for the employee's transfer to a new level or job. Leave blank when setting up a new position control.

Use the *Update Employer Codes* function and code type **TRR** to set up level transfer reason values. Set up a blank value if you plan to leave the *Lvl Trans Reason* field blank to create transfer transactions in personnel actions with a blank transfer reason.

Include Term.?

You use this field to indicate if the system should include terminated employees when it processes the *Trial Update Employee Positions* function. Valid values are:

0	Exclude terminated employees from the *Trial Update Employee Positions* function.
1	Include terminated employees in the *Trial Update Employee Positions* function.

Description

Type any additional information about this transfer personnel transaction.

The information you enter into this field is retained in the personnel actions file, PEPTR, when you use the *Mass Update Personnel Actions* function.

Comment

Type any additional information about this transfer personnel transaction.

The information you enter into this field is retained in the personnel actions file, PEPTR, when you use the *Mass Update Personnel Actions* function.

6 When you have completed the fields on this screen, press Enter. The system displays the following message:

Building submission request . . .

7 After you press Enter the system displays the Infinium HR main menu. To review the status of the *Trial Update Employee Positions* job and the associated audit reports, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen.

8 Review the audit reports. If you find errors, make any necessary changes to the job control records, position control records or employee records and rerun the *Trial Update Employee Positions* function. You can execute this function as many times as you require to obtain the correct results.

When you obtain the correct results from the *Trial Update Employee Positions* function, use the *Mass Update Employee Positions* function to update the employee's records.

Using Mass Update Employee Positions

After you have obtained the correct results from the *Trial Update Employee Positions* function, use the *Mass Update Employee Positions* function to update employee records with new information from their respective job and position controls.

Follow the steps below to use the *Mass Update Employee Positions* function.

1. From the main menu select *System Operations.*

2. Select *Personnel Init. Functions.*

3. Select *Position Data.*

4. Select *Mass Update Employee Positions* [MUEPD]. The system displays the Mass Update Employee Positions screen.

5. Use the information beginning on page 11-12 to fill in the fields on this screen.

6. When you press Enter the system processes the *Mass Update Employee Positions* function and updates employee records with new information based on the employee's assigned job and position controls.

   To review the status of the *Mass Update Employee Positions* job and the associated audit reports, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen.

Mass Updating Supervisor Information

The *Mass Update Supervisor Data* function allows you to change supervisor information in the employee basic data information of numerous employees and generates an audit report. When you run the *Mass Update Supervisor Data* function, the system updates the values in the *Sup. Employer* and *Sup. Name* fields in the employee basic data information with new supervisor information.

Before using the *Mass Update Supervisor Data* function, you must always run a trial using the *Trial Mass Supervisor Data* function. After you run the trial, thoroughly review and verify the results before proceeding to use the *Mass Update Supervisor Data* function.

The *Trial Mass Supervisor Data* function allows you to preview and verify proposed supervisor data changes. If the results are not satisfactory, you can make changes to your position controls and rerun the *Trial Mass Supervisor Data* function. The *Mass Update Supervisor Data* function permanently updates the employees' records.

Prior to running the *Trial Mass Supervisor Data* and *Mass Update Supervisor Data* functions, you must run the *Mass Update Position Correction* function to ensure that the information in the *Assigned Employee* field on the Update Organization screen is correct.

Using *Trial Mass Supervisor Data* and *Mass Update Supervisor Data* Function

Trial Update

Follow the steps below to use the *Trial Mass Supervisor Data* function.

1. From the Infinium main menu select *System Operations*.
2. Select *Supervisor Functions*.
3. Select *Miscellaneous Functions*.
4. Select *Trial Mass Supervisor Data* [TRLMASSSUP]. The system displays the screen shown in Figure 11-3.

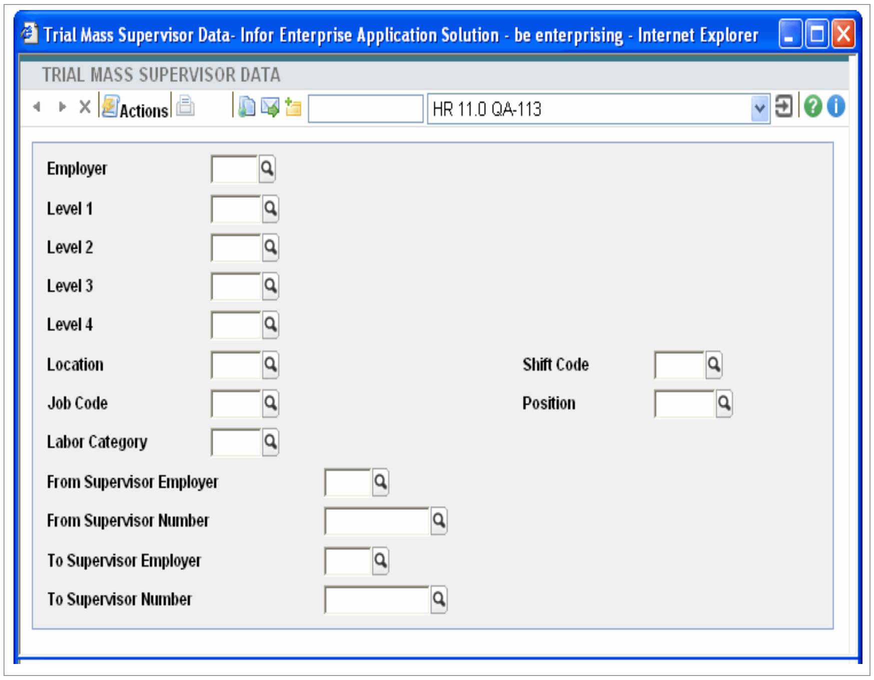


Figure 11-3: Trial Mass Supervisor Data screen

5 Complete the selection criteria fields on the Trial Mass Supervisor Data screen to restrict the update information listed below.

Employer

Specify the employer whose supervisor information you want to update.

Level 1 through Level 4

To update supervisor information for only those employees assigned to a particular organizational level, type the value that represents that level. To update supervisor information for employees assigned to all organizational levels, leave these fields blank.

Location

To update supervisor information for only those employees assigned to a particular location, type the value that represents that location. To update supervisor information for employees assigned to all locations, leave this field blank.

Shift Code

To update supervisor information for only those employees assigned to a particular shift, type the value that represents that shift. To update supervisor information for employees assigned to all shifts, leave this field blank.

Job Code

To update supervisor information for only employees assigned to a particular job, type the value that represents that job. To update supervisor information for employees assigned to all jobs, leave this field blank.

Position

To update supervisor information for only those employees assigned to a particular position, type the value that represents that position. To update supervisor information for employees assigned to all positions, leave this field blank.

Labor Category

Specify the code value that identifies the labor category of the employees to include in the updated supervisor information. Leave this field blank to include all labor categories.

From Supervisor Employer

Type the value that represents the currently assigned supervisor's employer.

To Supervisor Employer

Type the value that represents the new supervisor's employer.

From Supervisor Number

Type the employee number of the currently assigned supervisor.

To Supervisor Number

Type the employee number of the new supervisor.

6. Press Enter to display level descriptions and the supervisor names.
7. Press F16 to submit your request for processing.
8. Review the Trial Mass Update Supervisor report.
9. If the results are not satisfactory, make the necessary changes to your position controls and rerun the *Trial Mass Supervisor Data* function, or if the results are satisfactory, proceed to step 1.

Mass Update

1. Repeat steps 1, 2 and 3.

2 Select *Mass Update Supervisor Data* [MASSUPDSUP].

3 Use the information in steps 5 through 7 to run the *Mass Update Supervisor Data* function. This function updates supervisor information in the basic data information of specified employees and generates an audit report. Retain the report for your records.

Purging Terminated Employees

You use this function to purge terminated employees from your Infinium HR database. When you execute this option, the system removes information about the terminated employee from all Infinium HR and Infinium PY files including the basic data record, personnel data record, payroll data record, benefits information, check history information, W-2 information and so on.

When you execute the *Purge Terminated Employees* function, you can elect to save the employee's Master File information (basic data, personnel data and payroll data records) to special purged employee files. Later your MIS staff can transfer these files to a back-up tape. You can print out the Master File information for purged employees when you execute the *Purge Terminated Employees* function.

After an employee is purged, you can reassign his or her employee number to another employee.

The system automatically creates a skeletal record on Infinium HR for each purged employee that includes the information listed below. The system uses information that was in the employee's basic data record as of the date the employee was purged from your system to create the purged employee information.

- Employer
- Employee Name
- Employee Address
- Employee Telephone Number
- Tax I.D. #
- Employee Number
- Hire Date
- Termination Date
- Termination Reason Code

You can display this information using the *Display Purged Employees* function within the *Display Employee Data* option on the Infinium HR main menu. You can use the List Employees Purged report to print out this information. See the parts on "Displaying Employee Data" and "Printing Employee Data" for details.

The system purges only records of employees that have already been terminated and whose *Keep Permanently?* field in basic data is **0**. You use the termination transaction in the *Enter Personnel Actions* function to terminate employees. See the “Entering Personnel Actions” chapter for details about the termination transaction.

WARNING! You should not purge employees whose termination dates are in the current or immediately prior calendar year. Infinium PY needs the terminated employee’s payroll history information to produce tax reports and employee tax forms such as the W-2 and the T4. This payroll history information is not included in the special purged employee save files created during the *Purge Terminated Employee* function.

Follow these steps to execute the *Purge Terminated Employees* function:

1 From the main menu select *System Operations.*

2 Select *Personnel Purge Functions.*

3 Select *Employee Data.*

4 Select *Purge Terminated Employees* [PTE]. The system displays the screen shown in Figure 11-4.

```
 6/22/11  17:36:33       Purge Terminated Employees       PRGJC50    PRDJC50

Employer  . . . .  ___ +      -or-    Employer Group  .  _____ +

Level 1 . . . . .  _____ +            Level 2 . . . . .  _____ +
Level 3 . . . . .  _____ +            Level 4 . . . . .  _____ +

Purge Through Dt.  _______0           Termination Code   _____ +

List Purged EEs?   0  (0=No 1=Yes)    Purge W-2 Files?   0 (0=No 1=Yes)
Purge Appl Recs?   1  (0=No 1=Yes)
Save Purged Data?  0  (0=No 1=Yes)

If  Save Purged Data?  = Yes is specified, then Basic Data, Payroll Master,and
Personnel Master records (if applicable) for purged employees will be saved to
disk files PRPMST, PEPMST, and PYPMST. These files may be then saved to tape,
cleared, or deleted at the discretion of the user.

NOTE: Purging records of employees terminated in the previous calendar
year may have serious consequences for the production of tax reports
(e.g. W2 reports) for the previous calendar year. Proceed with caution.

F3=Exit  F4=Prompt  F10=Access
```

Figure 11-4: Purge Terminated Employees screen

5 Use the following information to fill in the fields on this screen:

WARNING! Use this function with extreme caution! It permanently removes terminated employee information from your Infinium HR database.

You must type information in the *Employer* or *Employer Group* fields. In addition, you must fill the *Purge Through Dt*., *List Purge EEs?*, *Purge Appl Recs?* and *Save Purged Data?* fields.

Employer

Type the code that represents the employer within which you want to purge terminated employees. Press F4 to display a list of valid employers. You must make an entry in this field or in the *Employer Group* field.

Employer Group

Type the code value that identifies the group of employers within which you want to purge terminated employees. The system purges terminated employees from all of the employers included in the specified employer group. You must make an entry in this field or the *Employer* field.

You use code type **ERG** to define employer groups; you use the *Update Employer Groups* function within the *Update Master Files* option to assign employers to an employer group. See the *Infinium HR Guide to Controls* for further information on defining employer groups.

Level 1

Type the value that identifies a specific level 1 location within the specified employer. The system only purges terminated employees within this level 1 location. Press F4 to display the level 1 records defined for this employer or leave this field blank to purge terminated employees in all levels within this employer.

Level 2

If you specified a level 1 location, you can further restrict the purge of terminated employees by typing the value that represents the specific level 2 within the level 1 typed above. Press F4 to display the level 2 records defined for this employer or leave this field blank to purge all terminated employees within the level 1 specified above.

Level 3

If you specified level 1 and level 2 locations, you can further restrict the purge of terminated employees by typing the value that represents the specific level 3 within the level 2 typed above. Press F4 to display the level 3 records defined within the specified level 2 for this employer or leave this field blank to purge all terminated employees within the level 2 specified above.

Level 4

If you specified levels 1, 2 and 3, you can further restrict the purge of terminated employees by typing the value that represents the specific level 4 within the level 3 typed above. Press F4 to display the level 4 records defined within the level 3 for this employer or leave this field blank to purge all terminated employees within the level 3 specified above.

Purge Through Dt.

Type the date the system will use to determine which terminated employees to purge. The system purges all terminated employees whose termination date is equal to or prior to this date. For example, if you type **12-31-90** in this field, the system purges all employees whose termination dates are December 31, 1990 or earlier. The system does not purge employees whose termination dates are January 1, 1991 or thereafter.

If you type a date that is within the current calendar year or the immediately prior calendar year, the system generates the warning message shown below. For example, the system produces the warning message if you are using the *Purge Terminated Employees* function on June 1, 1995 and the date you type in the *Purge Through Dt.* field is in 1995 or 1994.

Purge date in previous or current year. Press F21 to override.

If you press F21, the system uses the specified date in the current or prior calendar year to purge employees. However, by overriding this warning, you cause the system to purge payroll records that are required to produce W2 or T4 forms for the purged employees. Infinium does not recommend that you override this warning.

Termination Code

You can use this field to restrict which terminated employees are purged. When you type a termination reason code value in this field, the system purges only those employees whose termination reason code matches the one you specify. The system does not purge other terminated employees with different termination reason codes. You assign a termination reason code to employees when you type their termination transaction in the *Enter Personnel Actions* function.

You define values for this field using code type **TRM**.

Leave this field blank to purge all terminated employees who meet the other criteria you specify on this screen.

List Purged EEs?

You use this field to indicate if the system should print a profile report for each terminated employee it purges. The report includes the following information:

- Basic Data
- Personnel Data
- On-the-Job Training Data
- Personnel Actions

Valid values for this field are:

0	Do not print a profile report for each purged employee.
1	Print a profile report for each purged employee.

Purge Appl Recs?

Use this field to indicate if the system should purge the applicant records, if any, of terminated employees it purges.

Valid values are:

0	Do not purge the applicant records of purged employees.
1	Purge the applicant records of purged employees.

Saved Purged Data?

Use this field to indicate if the system should save the master files of purged employees to special files, so that your MIS staff can later save these special purged employee files to a backup tape and remove them from the AS/400 or iSeries.

The original file names and saved file names are shown below.

File Description	File Name	Purged Employee File Name
Basic Data	PRPMS	PRPMST
Personnel Data	PEPMS	PEPMST
Payroll Data	PYPMS	PYPMST

Purge W-2 Data

Specify yes to purge W-2 work files for the terminated employees included in the selected time period. If you indicate you want to purge W-2 work files, data is purged from these files:

File	Description
PYPW2F	Employee federal information
PYPW2ST	Employee state information
PYPW2L	Employee locality information
PYPW2M	Employee miscellaneous information for Box 12
PYPW2O	Other Box 14 information
PYPTX	W-2 master file

6 After you have carefully completed all of the appropriate fields on this screen, press Enter. The system produces the following message:

Building Submission Request . . .

To review the status of the *Purge Terminated Employees* job and the associated employee profile report, access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen.

Chapter 12 Displaying Employee Information

12

This chapter describes various ways you can display employee information.

The chapter consists of the following topics:

Overview of Displaying Employee Information

This chapter provides you with an overview of the various displays of employee information within the *Display Employee Data* function in Infinium HR. These displays show you the employee information you enter using the *Enter New Hire* or *Update Employee Data* functions.

You can find information about additional displays of employee data in other parts of this book. For example, the “Displaying Employee History” chapter in this guide provides information about displaying employee history maintained through the *Enter Personnel Actions* function.

In this chapter, you learn how to use the *Employee Locate* function to search for a particular employee within or across employers. You can display lists of employees sorted in several different ways within the *Employee Locate* function or when you prompt from the *Employee* or *Last Name* fields shown on Infinium HR selection screens.

You use *Employee Inquiry* to search your database for employees who meet a specified combination of criteria. You can then select from the resulting employee list to view current basic, personnel, or payroll information for each employee.

You use *Point In Time Inquiry* to specify an audit date and then search your database for employees who meet a specified combination of criteria. You can then select from the employee list to view audit or historical basic, personnel, or payroll information for each employee for the specified date. Included are the user profile of the user who made the change and a timestamp of the date and time of the change.

You use the *Employee Topic List* as a single point of entry to update and/or display a wide range of Infinium HR and Infinium PY information about a specified employee. Your user security identifies which screens you see on the Employee Topic List selection screen, as well as their order. For example, you can use *Employee Topic List* to display the employee’s basic data - compensation information, employee direct deposit and automobile data without having to access three separate functions.

You use the *Display Employee Data* function to view the basic data and personnel data records for a specified employee. You can also use this function to display a listing of all employees in a specified employer or those assigned to a particular part of your organization.

The balance of this chapter provides general information on how to use the following employee data display functions:

- *Display Edition Data*
- *Display On-Job-Training Data*
- *Display Property Data*
- *Display Dependents Data*
- *Display Automobile Data*
- *Display User Defined Data*
- *Display Foreign National Data*
- *Display Ticklers*
- *Display Blood Types*
- *Display Skills Data*
- *Display Purged Employees*
- *Display Skills Inventory Data*
- *Display Tuition Reimbursements*

Using Employee Locate

Overview

Use *Employee Locate* to find an employee and high level information about that employee, such as the employee' employer, employee number, exact spelling of the employee' name, and the employee' assignment such as organizational levels, position, or location.

You can access the Employee Locate page from many places in Infinium HR and Infinium PY, use many combinations of search criteria, and choose from many employee list displays such as by name, by position, by previous name, and by office telephone number.

Access to *Employee Locate*

You can access *Employee Locate* directly from the menu.

You can also access the same Employee Locate feature throughout Infinium HR and Infinium PY functions from most pages where you are prompted to specify an employee and need to find the employee' number. Access the feature by prompting in *Employee* or *Last Name*.

Level Security for *Employee Locate*

When specifying an employer in *Employer*, level security is used. Only information to which the employee is authorized is displayed. If *Employer* is blank, level security is not used.

Default Initial Employee List Views

You can define your own defaults for whether the initial employee list includes inactive (terminated) employees and what employee assignment information the initial page displays. You can change your defaults at this page. The system stores your defaults in your user security controls.

Regardless of whether you include inactive employees, *Employee Locate* does not include purged employees.

Choice of Sorting and Locating Strategies

The initial Employee Locate page provides a list of employees by last and first name. You can subset the list by specifying many different combinations of employer with organizational levels, location, pay cycle, position, and job. For example, you can shorten the list to all employees who work for the employer at a specific location in a specific job.

From the initial page, you can also choose any of the following for alternative sorting and locating strategies:

- First Name
- Job Code
- Tax ID
- Previous Name
- Position Title
- Common Name
- Phonetic Search
- Office Phone

Use the menu path below.

- *Infinium HR*
- *Employee Data*
- *Display Employee Data*
  - *Employee Locate* [EL]

or

- *Infinium PY*
- *Employee Data*
- *Update Employee Data*
  - *Employee Locate* [EELOC]

Locating an Employee at the Initial Page

On the initial Employee Locate page, you can specify whether to include inactive employees in your search, include inactive levels in your search, search by any of several criteria, specify which employee assignment information to display, and choose alternative sorting and locating strategies such as first name, previous name, nickname (common name), office phone number, and so forth.

Use the information below to complete this page.

Employer

Specify an employer to limit the list to employees of that employer.

If you omit the employer, you cannot display prompt lists for employer-specific search criteria such as level or job information. You must also specify an employer to access all alternative sort and locate pages except the Employees by Tax ID Number page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive employees. What you specify here becomes your default stored in your user security controls. Whenever you change to a new default here, your action updates your user security controls.

Level 1 through 4

You can specify any of the four organizational levels defined for this employer, such as Area, Division, Department and Cost Center, to narrow your search.

Location

You can specify a location to narrow your search to employees at that location.

PayCycle

You can specify a pay cycle to narrow your search to employees included in that pay cycle.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

Position

You can specify a position to narrow your search to employees holding that position.

Job

You can specify a job to narrow your search to employees in that job.

Locate

At this initial display page, use *Locate* to find a listed employee by last or last and first name. Type some or all the last name, or some or all of the last name and first name separated by a comma with no spaces on either side of the comma.

For example, to find Will Smythe without knowing whether the first name is Will or William and without knowing the exact spelling of the last name (Smith, Smyth, or Smythe), you can type **Sm,Wi**.

How Do I…

Change which information appears in the *Assignment* column	Press F23 to display the User Preference for Assignment Description window, type **1** (Organizational Level Codes), **2** (Lowest Level Description), **3** (Location Description), or **4** (Position Description), and press F3 to return from the window.
Search by known information	Specify a combination of any known employer, level, location, pay cycle, position, and job information and press Enter.
Refresh the display after specifying search criteria or after selecting from a prompt list	Press Enter or F5 (Reset).
Find a listed employee by name	In *Locate*, type some or all of the last name, or some or all of the last name plus a comma plus some or all of the first name, without spaces, and press Enter.
Sort and locate by first name	Specify an employer and press F6 to display the Employees by First Name page.

How Do I…	
Sort and locate by job code	Specify an employer and press F7 to display the Employees by Job Code page.
Sort and locate by tax ID	Press F8 to display the Employees by Tax ID Number page.
Sort and locate by previous name	Specify an employer and press F9 to display the Employees by Previous Name page.
Sort and locate by position title	Specify an employer and press F11 to display the Employees by Position Title page.
Sort and locate by common name (nickname)	Specify an employer and press F13 to display the Employees by Common Name page.
Sort alphabetically and locate by phonetic letter substitutions	Specify an employer and press F14 to display the Possible Phonetic Equivalent Names page
Sort and locate by office telephone number	Specify an employer and press F15 to display the Employees by Office Telephone Number page.
Exit to the menu	Press F3.

Sorting and Finding an Employee by First Name

On the Employees by First Name page, you can view a list of the specified employer's employees sorted by first name, and also view their office telephone numbers. You selected the **First Name** action at the Employee Locate page to access this page.

You can use *Locate* to find an employee in the list by first name.

The first names on this page are from the employees' basic data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type one or more letters of the desired employee's first name.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type one or more letters of the employee's first name in *Locate* and press Enter.
Return to the Employee Locate page	Press F12.

Sorting and Finding an Employee by Job Code

On the Employees by Job Code page, you can view a list of the specified employer's employees sorted by job code, and also view their employee numbers. You selected the **Job Code** action at the Employee Locate page to access this page.

You can use *Locate* to find an employee in the list by typing some or all of the employee's assigned job code.

The job codes on this page are from the employees' basic data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type some or all of a job code.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type some or all of a job code in *Locate* and press Enter.
Return to the Employee Locate page	Press F12.

Sorting and Finding an Employee by Tax ID

On the Employees by Tax ID Number page, you can view a list of the specified employer's employees sorted by Social Security Number (U.S.) or Social Insurance Number (Canada). You can also view the employees' employee numbers.

You selected the **Tax ID** action at the Employee Locate page to access this page, with or without specifying an employer.

You can use *Locate* to find an employee in this list by previous name. The tax IDs on this page are from the employees' basic data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page, if any. If you did not specify an employer, you can search through all employees by tax ID on this page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type the beginning or all of a tax ID.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type the beginning or all of a tax ID in *Locate* and press Enter.
Return to the Employee Locate page	Press F12.

Sorting and Finding an Employee by Previous Name

On the Employees by Previous Name page, you can view a list of the specified employer's employees sorted by previous name such as maiden name. You can also view the employees' employee numbers.

You selected the **Previous Name** action at the Employee Locate page to access this page. You can use *Locate* to find an employee in the list by previous name.

The previous names on this page are from the previous information section of the employees' personnel data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type some or all of a previous name.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type some or all of a previous name in *Locate* and press Enter.
Return to the Employee Locate page	Press F12.

Sorting and Finding an Employee by Position Title

On the Employees by Position Title page, you can view a list of the specified employer's employees sorted by position title. You selected the **Position Title** action at the Employee Locate page to access this page.

You can use *Locate* to find an employee in the list by position title.

The position titles on this page are from the employees' basic data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type some or all of a position title.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type some or all of the employee's position title in *Locate* and press Enter.
Return to the Employee Locate page	Press F12.

Sorting and Finding an Employee by Common Name (Nickname)

On the Employees by Common Name page, you can view a list of the specified employer's employees sorted by common name (nickname). You can also view the employees' last names, employee numbers, and office telephone numbers. You selected the **Common Name** action at the Employee Locate page to access this page.

You can use *Locate* to find an employee in the list by common name or nickname.

The names on this page are from the employees' basic data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type some or all of a common name or nickname as it appears in the employee's basic data.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type some or all of the employee's common name or nickname in *Locate* and press Enter.
Return to the Employee Locate page	Press F12.

Finding an Employee by Phonetic Spelling

On the Possible Phonetic Equivalent Names page, you can view a list of the specified employer's employees sorted by name. You can also view the employees' employee numbers and assignment information. You selected the **Phonetic Search** action at the Employee Locate page to access this page.

You can use *Phonetic Spelling* to find an employee in the list by last name even when you are unsure of the correct spelling, such as finding

You can broaden and narrow your search for matches by specifying a threshold of the percentage match as a search criterion.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Phonetic Spelling

Type a last name phonetically to find matches regardless of the possible letter variations such as Kornell or Cornell, Smyth or Smith.

How Do I…

Find a listed employee	Type a name phonetically in *Locate* and press Enter.
Lower the percentage match threshold to broaden a search	Press F14 to display the Change Threshold window, type a lower percentage and press Enter.
Return to the Employee Locate page	Press F12.

Sorting and Finding an Employee by Office Telephone Number

On the Employees by Office Telephone Number page, you can view a list of the specified employer's employees sorted by office phone numbers. You can also view the employees' employee numbers.

Employees with blank phone numbers are listed first. You selected the **Office Phone** action at the Employee Locate page to access this page. You can use *Locate* to find an employee in the list by phone number.

The phone numbers on this page are from the employees' basic data.

Use the information below to complete this page.

Employer

This is the employer that you specified on the Employee Locate page.

Include Inactive?

Specify **0** to exclude inactive (terminated) employees or **1** to include inactive and active employees. If you change your default setting here, your new setting is stored as your default in your user security controls.

Locate

Type some or all of an office telephone number.

Inc Inactive Lvls?

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list.

Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

How Do I…

Find a listed employee	Type some or all of an office telephone number in *Locate* as expressed in basic data and press Enter.
Return to the Employee Locate page	Press F12.

Using Employee Inquiry

You use this function to search for employees within a specified employer using up to 25 different search parameters in any combination.

After the system identifies the employees that meet your search criteria, you can display the following information for each selected employee:

- Basic Data
- Personnel Data
- Payroll Data
- Qualifications
- Education Data
- On-the-Job Training Data

WARNING! The *Employee Inquiry* function sorts employee records interactively. Consequently, searches done across a large employee database affect system performance by slowing down response time and processing speed for you and other users.

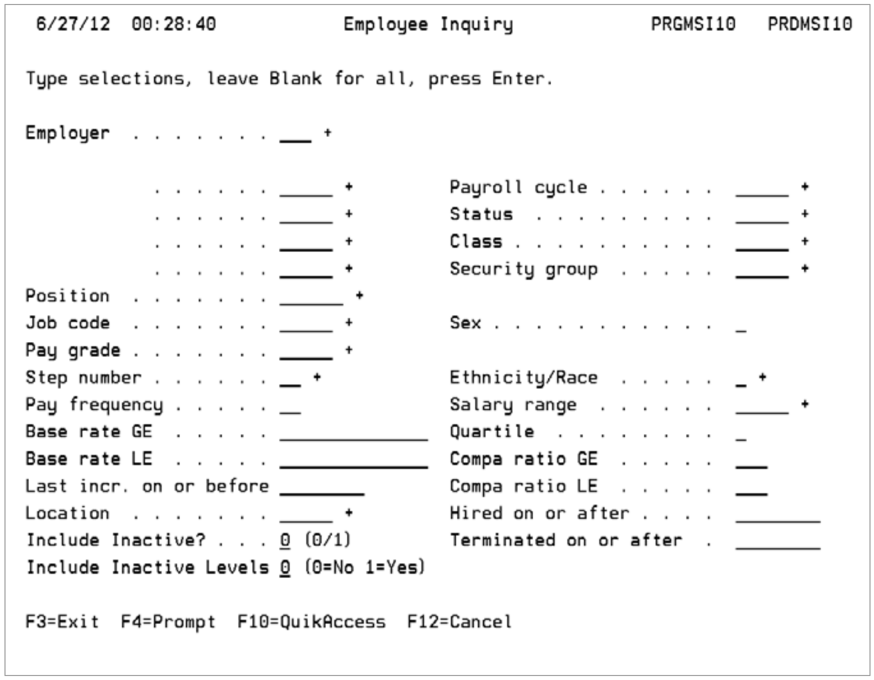
Follow these steps to use the *Employee Inquiry* function:

1 From the Infinium HR main menu select *Employee Data.*

2 Select *Display Employee Data.*

3 Select *Employee Inquiry* [EE].

The system displays the first Employee Inquiry screen as shown in Figure 12-1.



```
 6/27/12  00:28:40            Employee Inquiry            PRGMSI10   PRDMSI10

Type selections, leave Blank for all, press Enter.

Employer  . . . . . . . ___ +

            . . . . . . _____ +        Payroll cycle . . . . . .  _____ +
            . . . . . . _____ +        Status  . . . . . . . . .  _____ +
            . . . . . . _____ +        Class . . . . . . . . . .  _____ +
            . . . . . . _____ +        Security group  . . . . .  _____ +
Position  . . . . . . . ______ +
Job code  . . . . . . . _____ +        Sex . . . . . . . . . . .  _
Pay grade . . . . . . . _____ +
Step number . . . . . . __ +           Ethnicity/Race  . . . . .  _ +
Pay frequency . . . . . __             Salary range  . . . . . .  _____ +
Base rate GE  . . . . . ______________ Quartile  . . . . . . . .  _
Base rate LE  . . . . . ______________ Compa ratio GE  . . . . .  ___
Last incr. on or before ________       Compa ratio LE  . . . . .  ___
Location  . . . . . . . _____ +        Hired on or after . . . .  ________
Include Inactive? . . . 0 (0/1)        Terminated on or after  .  ________
Include Inactive Levels 0 (0=No 1=Yes)

F3=Exit  F4=Prompt  F10=QuikAccess  F12=Cancel
```

Figure 12-1: Employee Inquiry screen 1 of 2

4 Use the following information to complete the fields on this screen:

You must specify an employer and whether to include inactive employees in the inquiry. All other fields are optional and can be used in any combination.

If you select an employer by prompting on the *Employer* field, the levels default into the blank level description fields under the *Employer* field.

If you type the employer name, the level descriptions do not default into the level description fields until you advance to screen two and then return to screen one.

If you have a default employer associated with your user profile, the system automatically fills the *Employer* field with the default employer and displays the level descriptions defined for that employer.

You cannot use certain fields on this screen if field level security has been established for your user profile on those fields.

Employer

Type the code that identifies the employer for which you want to display employees. This is a required field.

Levels

If you want to display employees assigned to one or more levels within the specified employer, type the code that represents the desired level(s). Each employee must be assigned to at least one level; the system compares the values in the Level fields in his or her basic data record to the value(s) you specify here. Press F4 to view a list of valid level codes.

Payroll cycle

If you want to display employees assigned to a particular payroll cycle, type the code that identifies that cycle. This is a required field in payroll data. The system compares the value in each employee's *Payroll Cycle* field in his or her payroll data record to the value you specify here and displays the matching employees on the following screen.

The system performs a special edit when you use both the *Payroll cycle* and *Pay frequency* fields on this screen. If you specify a value in the *Pay Frequency* field on the cycle control record in Infinium PY, the system compares it to the value you type in the *Pay frequency* field on this screen. If the values do not correspond, the system displays the following message when you press Enter on this screen:

Pay frequency is invalid.

Status

Type the status code value of the employees that you want to display. This is a required field in employee basic data. You define values for this field using code type **STS**. Press F4 to display a list of valid status code values.

Class

Type the class code value of the employees you want to display. This is an optional field in employee basic data. You define values for this field using code type **CLA**.

Security group

Type the security group code value of the employees you want to display. This is an optional field in employee basic data. You define values for this field using code type **SEC**.

If your user profile is restricted from seeing the records of employees assigned to a particular security group, when you specify that security group value on this screen the system displays a list containing the names of matching employees with the following comment under the *Position title* field on the screen shown in Figure 12-2:

*** NOT AUTHORISED**

You cannot display any information for employees assigned to a security group from which you are restricted.

Position

Type the position code of the employees that you want to display. This is a required field in employee basic data. Each employee is assigned to a position during the *Enter New Hire* function; you use the *Enter Personnel Actions* function to update the employee's position assignment.

Job code

Type the job code of the employees that you want to display. The system compares this value to the value in the *Job Code 1* field in employee basic data. This is a required field in the basic data record that defaults from each employee's assigned position.

Sex

Type a value to display employees of a particular gender. This is a required field in the employee basic data record. Valid values are:

M	Male
F	Female

Pay grade

Type the pay grade code of the employees you want to display. This is an optional field in the employee basic data record that defaults from each employee's assigned job. If an employee is assigned to a pay grade, he or she is also assigned to a particular step in that grade. You can use the *Step number* field below to further restrict your inquiry.

Step number

Specify the step number of the employees that you want to display. If you leave the *Pay grade* field blank, the system displays all employees assigned to the specified step regardless of their assigned pay grade.

Ethnicity/Race

Type the ethnic identification code of the employees that you want to display. This is a required field in the employee basic data record. You define values for this field using code type **ETH**.

Pay frequency

Type the pay frequency value of the employees that you want to display. This is a required field in the employee basic data record.

Valid values are:

D	Daily
W	Weekly
B	Biweekly
M	Monthly
S	Semimonthly
10	10 Pay Periods per Year
13	13 Pay Periods per Year
22	22 Pay Periods per Year
27	27 Pay Periods per Year
53	53 Pay Periods per Year

Salary range

Type the code that identifies the salary range of the employees you want to display. This value defaults into the *Salary Range* field in each employee's basic data record based on the salary range associated with the employee's Job code.

Base rate GE

Type a value in this field to display employees whose base rate is the same as or exceeds the rate you specify here. The system compares the value you type here to the value in the *Base Rate* field in each employee's basic data record.

Quartile

Type the quartile value of the employees you want to display. The system compares the value you specify here to the value in the *Salary Quartile* field in each employee's basic data record.

The *Salary Quartile* field is a protected field in the basic data record that the system maintains by comparing the employee's base rate to the quartiles of his or her assigned salary range. The system automatically divides each salary range into four equal parts. The minimum of the salary range is the lower boundary of quartile 1. The midpoint of the salary range is both the upper boundary of quartile 2 and the lower boundary of quartile 3. The upper boundary of quartile 4 is the maximum of the salary range.

The system also defines quartile 0 for employees whose base rate falls below the minimum of their salary range and quartile 5 for employees whose base rate exceeds the maximum of their salary range.

Base rate LE

Type a value in this field to display employees whose base rate is the same as or less than the rate you specify here. The system compares the value you type here to the value in the *Base Rate* field in each employee's basic data record.

Compa ratio GE

Type a value in this field to display employees whose comp ratio is the same as or larger than the value you specify here. The system compares the value you type here to the value in the *Comp Ratio* field in each employee's basic data record.

The *Comp Ratio* field is a protected numeric field in the basic data record that the system computes by dividing the employee's salary by the midpoint of the assigned salary range. If the employee's base rate is equal to the midpoint of the assigned salary range, the comp ratio is 100%.

Last incr. on or before

Use this field to display employees whose most recent salary change effective date is the same as or proceeds the date you specify here. The system compares the date you type here to the date in the *Last Increase* field in the employee basic data record. The system automatically updates the *Last Increase* field when you enter a salary change transaction through the *Enter Personnel Actions* function.

Compa ratio LE

Type a value in this field to display employees whose comp ratio is the same as or lower than the value you specify here. The system compares the value you type here to the value in the *Comp Ratio* field in each employee's basic data record.

The *Comp Ratio* field is a protected numeric field in the basic data record that the system computes by dividing the employee's salary by the midpoint of the assigned salary range. If the employee's base rate is equal to the midpoint of the assigned salary range, the comp ratio is 100%.

Location

Type the location code of the employees that you want to display. This is a required field in the employee basic data record that defaults from each employee's assigned position code. You define values for this field using code type **LOC**.

Hired on or after

Use this field to display employees hired on or after the date you specify here. The system compares the date you type here to the value in the *Date of Hire* field in each employee's basic data record.

Include Inactive?

Type **1** to include both active and inactive (terminated) employees or **0** to include only active employees.

Terminated on or after

Use this field to display employees terminated on or after the date you specify here. The system compares the date you type here to the value in the *Termination Date* field in employee basic data. The system fills this field for a particular employee when you enter a termination transaction through *Enter Personnel Actions* function and clears this field when you enter a rehire transaction for the same employee.

Include Inactive Levels

Specify whether to include only employees from active levels or employees from both active and inactive levels in the list. Valid values are:

0	Include only employees from active levels.
1	Include employees from both active and inactive levels.

5 Press Enter to display a list of matching employees as shown in Figure 12-2. The system displays the following message while it scans your Infinium HR database for employees that meet your specifications:

Employer Search In Progress

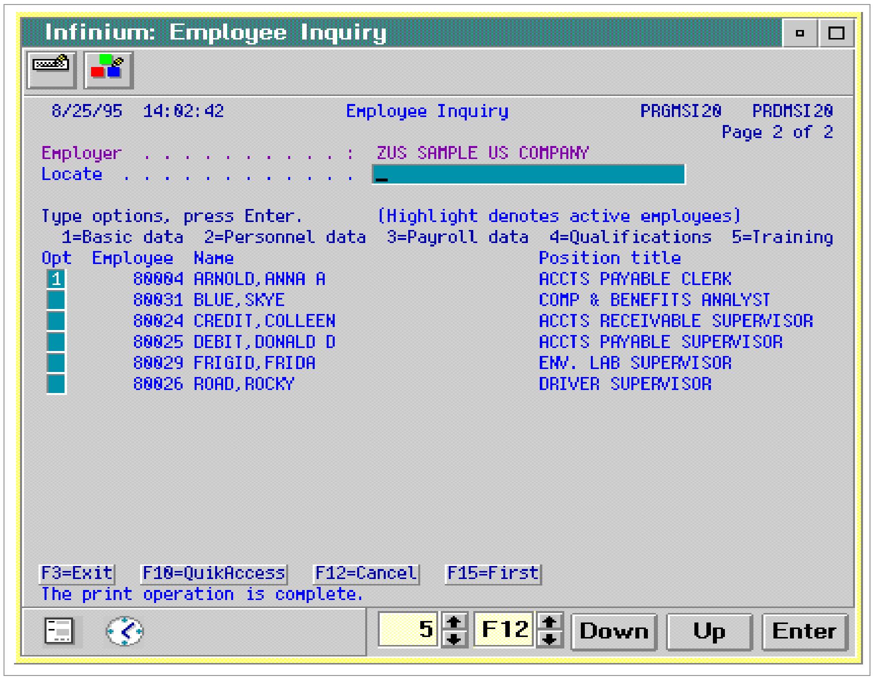


Figure 12-2: Employee Inquiry screen

6 Use the following information to view the data of employees displayed on this screen.

This screen displays an alphabetical list of employees who satisfy the search criteria you specified on the preceding screen. You can display additional information about each employee by typing one of the following values in the *Opt* field next to a particular employee.

Value	The System Displays:
1	Basic data
2	Personnel data
3	The prompt screen for the *Display Employee Data* function on Infinium PY. You can select options to view the employee's payroll data, income data, deduction data, direct deposit data, multiple distributions, job authorizations and user-defined data.
4	Education data, including formal education and tuition reimbursement information
5	On-the-job training data, including skills, internal and external training information

7 After you type a value in the *Opt* field, press Enter to display the specified information. Press Enter to page through the screens you selected.

8 After you view all of the selected employee information, press F3 to return to the list of matching employees shown in Figure 12-4. You can use the *Opt* field to display detailed information for another employee, press F12 to return to the initial prompt screen for the *Employee Inquiry* function, or press F3 to return to the Infinium HR main menu.

Using Point-in-time Reporting

Overview

You use point-in-time reporting to display audit or historical information for an employer, an employee, or a group of employees for a specific point in time.

If you elect to use point-in-time reporting, you use *Point In Time Inquiry* to specify an audit date and then search your database for employees who meet a specified combination of criteria. You can then view historical basic, personnel, or payroll information for each employee for the specified date. Included are the user profile of the user who made the change and a timestamp of the date and time of the change.

Setting up Point-in-time Reporting

Before you can use point-in-time reporting, you must use *Update Employer Controls* and specify **Yes** in *Point In Time Rpting* for each employer using point-in-time reporting.

You then use *Point In Time Initialization* to create audit files that the system uses for baseline information for each employee within your employer. During initialization, the system copies the files listed below to set up corresponding audit files that contain the date and time of the initialization.

File Copied	Description	Audit File	Description
PRPMS	Employee basic data file	PRPMSA	Employee basic data audit file
PEPMS	Employee personnel master file	PEPMSA	Employee personnel master audit file
PYPMS	Employee payroll master file	PYPMSA	Employee payroll master audit file

After initializing the audit files, you use *Activate Point In Time* to activate point-in-time reporting. Once activated, the system adds individual historical records with date and time information to the corresponding audit file whenever you update an employee’s basic data, personnel, or payroll master file.

The system does not update the audit files when you use the following functions:

- *Correct Employee YTD Totals*
- Payroll cycle processing functions
- Functions for purging records from employee's basic data, personnel master or payroll master files

If you are activating point-in-time reporting for the first time, consider scheduling the activation of point-in-time reporting to coincide with critical calendar or fiscal year reporting requirements.

Caution: *Point In Time Inquiry* sorts employee records interactively. Searches performed across a large employee database affect system performance by slowing down response and processing times.

The point-in-time audit files collect audit records each time you use a function that results in an update to an employee basic data, personnel master, and payroll master file. The increase in the size of the audit files can affect system performance when you perform a search across a large employee database.

Using Point-in-time Reporting

After you activate point-in-time reporting, you use *Point In Time Inquiry* to specify criteria for audit reports of employees' basic data, personnel master, or payroll master file information for any date subsequent to the point-in-time activation date.

Deactivating Point-in-time Reporting

Whenever you install upgrade versions of Infinium HR or Infinium PY that include changes to the basic data file, PRPMS, the personnel master file, PEPMS, or the payroll master file, PYPMS, you must use *Deactivate Point In Time* to deactivate point-in-time reporting temporarily.

Caution: If users have access to the system when point-in-time reporting is deactivated, the system does not update the audit files with changes to basic data, personnel, or payroll master files.

Coordinate with your IS department when to schedule deactivating and reactivating point-in-time reporting so that users do not have access to the system when point-in-time reporting is deactivated.

Purging Point-in-time Files

When you use point-in-time reporting, the audit records collected by the system can increase significantly which can affect system performance. You can use the *Purge Point in Time Files* to remove these audit files from the system:

- PRPMSA
- PYPMSA
- PEPMSA

You can specify that the files should be saved as temporary files or deleted. If you save the purged files, the system creates these temporary files and deletes the audit files:

- PRPMSAT
- PYPMSAT
- PEPMSAT

If you do not save the purged files, the system deletes the audit files.

Initializing Point-in-time Reporting

Overview

Use *Point In Time Initialization* to set up audit files for use as baseline basic data, personnel, and payroll information for point-in-time reporting for each employee within your employer.

Caution: Be sure that all Infinium HR and Infinium PY users are signed off the system before you use the *Point In Time Initialization* function. Users signed onto the system cause the *Point In Time Initialization* function to fail.

Use the menu path below.

- Infinium HR
- *System Operations*
- *Point In Time Operations*
  - *Point In Time Initialization* [IPIT]

Initializing Point-in-time Reporting

On the Point In Time Initialization page, you specify the employer for whom to set up audit files for point-in-time reporting.

Use the information below to complete this page.

Employer

Specify an employer.

Include Term?

Specify **Yes** to include terminated employees for point-in-time reporting. Otherwise, specify **No**.

How Do I…

Initialize point-in-time reporting	Complete the information on the page and press Enter.

Activating Point-in-time Reporting

Overview

Use *Activate Point In Time* to activate Infinium HR to collect updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

Use the menu path below.

- Infinium HR
- *System Operations*
- *Trigger Functions*
  - *Activate Point In Time* [ACTPIT]

Activating Point-in-time Reporting

On the Activate Point In Time page, you can activate Infinium HR to collect updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

How Do I…	
Activate point-in-time reporting	Press Enter.

Deactivating Point-in-time Reporting

Overview

Use *Deactivate Point In Time* to deactivate Infinium HR from collecting updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

- Infinium HR
- *System Operations*
- *Trigger Functions*
    - *Deactivate Point In Time* [DEAPIT]

Deactivating Point-in-time Reporting

On the Deactivate Point In Time page, you can deactivate Infinium HR from collecting updates to employees' basic data, personnel master, and payroll master records in the audit files for point-in-time reporting.

How Do I…	
Deactivate point-in-time reporting	Press Enter.

Using Point-in-time Reporting

Overview

Use *Point In Time Inquiry* to generate audit reports of employees' basic data, personnel master, or payroll master file information.

Use the menu path below.

- Infinium HR
- *Employee Data*
- *Display Employee Data*

- *Point In Time Inquiry* [PITEI]

Specifying Employee Criteria

On the Employee Point In Time Inquiry criteria selection page, you specify the criteria to use for locating employees for whom to generate point-in-time audit information.

Use the information below to complete this page.

Employer

Specify an employer.

Employee

Specify the number of the employee for whom to display point-in-time audit information. If you do not know the employee number, use *Last Name*.

Leave blank to display all employees who meet your selection criteria.

If you specify a value in *Employee* or *Last Name* and leave *Date* blank, the system displays all audit records for the specified employee.

Last Name

Specify the last name of the employee for whom to display point-in-time audit information.

You can also type the last name or a portion of the last name and press F4 to display a list of employees who share the same name or portion of the name. From this list, you can select the employee for whom you want to display point-in-time audit information.

If you specify a value in *Employee* or *Last Name* and leave *Date* blank, the system displays all audit records for the specified employee.

Date

Type the date for which you want to generate the point-in-time audit information.

If you leave *Date* blank and specify a value in *Employee* or *Last Name*, the system displays all audit records for the specified employee.

Time

Type the time of day for the specified date to see how your organization looked at that date and time.

If you leave this field blank and specify a value in the *Employee* or *Last Name* field, the system displays all audit records for the specified employee.

Level 1, 2, 3, 4

Specify the values for the levels to display point-in-time audit information for employees assigned to one or more levels within an employer.

Payroll cycle

Specify the payroll cycle used to pay the employees whose point-in-time audit information you want to display.

If you specify *Payroll cycle* and *Pay frequency* values on this page, the *Pay frequency* value must equal the *Pay Frequency* value on the cycle control.

Status

Specify the status of employees whose point-in-time audit information you want to display.

Class

Specify the class of the employees whose point-in-time audit information you want to display.

Infinium HR uses class designations for wage and salary planning.

Security group

Specify the security group to which employees whose point-in-time audit information you want to display are assigned.

You cannot display information for employees assigned to security groups from which you are restricted.

Position

Specify the position of the employees whose point-in-time audit information you want to display.

Job code

Specify the job code of the employees whose point-in-time audit information you want to display.

Sex

Specify the gender of the employees whose point-in-time audit information you want to display.

Valid values are:

F	Female
M	Male

Pay grade

Specify the pay grade of the employees whose point-in-time audit information you want to display.

Step number

Specify the step number of the employees whose point-in-time audit information you want to display.

Leave *Pay grade* blank to display all employees assigned to the specified step regardless of the assigned pay grade.

Ethnicity/Race

Specify the ethnic code of the employees whose point-in-time audit information you want to display.

Pay frequency

Specify the pay frequency of the employees whose point-in-time audit information you want to display.

Valid values are:

D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
10	10 pay periods per year
13	13 pay periods per year
22	22 pay periods per year
27	27 pay periods per year

53	53 pay periods per year

Salary range

Specify the salary range of the employees whose point-in-time audit information you want to display.

Base rate GE

Type the minimum base pay rate amount for employees whose point-in-time audit information you want to display.

Express the base rate as a monthly salary for a salaried employee or as a primary hourly rate for an hourly employee.

Quartile

Type the value for the salary range quartile in which the base pay rate resides for employees whose point-in-time audit information you want to display.

Infinium HR uses an employee’s base pay rate and the salary quartiles assigned to the salary range to compute each employee’s salary quartile on the employee basic data record.

Each salary range comprises four equal quartiles. The minimum of the salary range is the lower boundary of quartile 1. The midpoint of the salary range is both the upper boundary of quartile 2 and the lower boundary of quartile 3. The upper boundary of quartile 4 is the maximum of the salary range.

Infinium HR also defines quartile 0 for employees whose base rate is below the minimum of the salary range and quartile 5 for employees whose base rate exceeds the maximum of the salary range.

Base rate LE

Type the maximum base pay rate amount for employees whose point-in-time audit information you want to display.

Express the base rate as a monthly salary for a salaried employee or as a primary hourly rate for an hourly employee.

Compa ratio GE

Type a value that represents a comparison ratio that is less than the comparison ratio of employees whose point-in-time audit information you want to display.

The comparison ratio is equal to an employee's salary divided by the mid-point salary range. When the base rate equals the mid-point of the salary range, the comparison ratio is 100%.

Infinium HR updates an employee's comparison ratio whenever you use *Enter Personnel Actions* to process a salary change transaction.

Last increase prior to

Type a date before which the last pay increases occurred for employees whose point-in-time audit information you want to display.

Compa ratio LE

Type a value that represents a comparison ratio that is greater than the comparison ratio of employees whose point-in-time audit information you want to display.

The comparison ratio is equal to an employee's salary divided by the mid-point salary range. When the base rate equals the mid-point of the salary range, the comparison ratio is 100%.

Infinium HR updates an employee's comparison ratio whenever you use *Enter Personnel Actions* to process a salary change transaction.

Location

Specify the location of the employees whose point-in-time audit information you want to display.

Hired after

Type a date after which your employer hired employees whose point-in-time audit information you want to display.

Include Inactive

Specify whether to include employees with an inactivate status for point-in-time reporting.

Valid values are:

0	Include only active employees.
1	Include active and inactive employees.

Terminated after

Type a date after which your employer terminated employees whose point-in-time audit information you want to display.

How Do I…

Display a list of employees for whom to generate point-in-time audit information	Complete the information on this page and press Enter.

Selecting Audit Reports

On the Employee Point In Time Inquiry audit report selection page, you select to display audit reports of basic data, personnel data, or payroll data for employees who meet your selection criteria.

From this page, you have access to the following audit report pages within the three audit files:

- Employee basic data audit file (PRPMSA)
  - Display Employee Basic Data personal information page
  - Display Employee Basic Data job-related and performance information page
  - Display Employee Basic Data contact and miscellaneous information page
  - Display Employee Basic Data compensation information page
  - Display Employee Basic Data break-in-service information page
  - Display PTO Accruals page with paid-time-off accrual information

    You can display additional paid-time-off accrual information from this page by typing **5** in *Opt* next to an accrual type.
- Employee personnel master audit file (PEPMSA)
  - Display Employee Personnel Data information page
  - Display Employee Personnel Data emergency and military information page

    You can display an Employment Eligibility Verification page from any of the employee personnel master audit report pages by pressing F8.
  - Display Employee Personnel Data previous information page
- Employee payroll master audit file (PYPMSA)
  - Display Employee Payroll Data previous information page

Use the information below to complete this page.

Opt

Specify the type of point-in-time audit report to display.

Valid values are:

1	Basic data
2	Personnel data
3	Payroll data

How Do I…

Display an audit report	Type the value for the audit report to display and press Enter.

Using Purge Point-in-time Files

Overview

Use *Purge Point In Time Files* to delete audit records created when you used *Point in Time Inquiry.*

Use the menu path below.

- Infinium HR
- *System Operations*
- *Point in Time Operations*
  - *Purge Point in Time Files* [PRPPIT]

Purging Point in Time Files

On the Purge Point in Time Files page you specify the criteria to be used to purge Point-in-time files.

Use the information below to complete this page.

Employer

Specify the employer for whom you are purging point in time data. Leave blank if you are specifying an employer group. You must enter an employer or employer group.

Employer Group

Specify the employer group for whom you are purging point in time data. Leave blank if you are specifying an employer. You must enter an employer or employer group.

Purge through Dt

Specify the ending date for the system to use when it purges point in time audit records. The system compares this date to the *Creation Date* (Date Created) field in the three employee master audit files, PEPMSA, PRPMSA, PYPMSA, and purges audit records with creation dates that are the same as or before the date you specify

Save Purged Data?

Type **1** to save to a disk file basic data, personnel master, and payroll master audit records, if applicable, purged by this function.

Type **0** if you do not want to save basic data, personnel master and payroll master audit files to a disk file.

Using the Employee Topic List

Overview

Use *Employee Topic List* for efficient access to pages of employee information from any of many Infinium HR and Infinium PY functions.

You can pick and choose which pages to update and display, such as basic data - compensation information, employee direct deposit and automobile data, without having to go to a series of separate functions and without having to page through a function to find the information page you need.

Variable Contents of the Topic List

The list and order of available pages is defined in your user security.

Your supervisor specifies which topics you can access, the sequence in which you see the topics listed, and the name of each topic.

Use the menu path below.

- Infinium HR or Infinium PY
- *Employee Data*
  - *Employee Topic List* [TOPIC]

You can also access the Employee Topic List during the Enter New Hire process. See the “Hiring New Employees into US Employers” or the “Hiring New Employees into Canadian Employers” chapter in this guide for more information.

Identifying the Employer and Employee

On the Employee Topic List prompt page, you can identify an employer and the employee for whom you are displaying and/or updating information.

Use the information below to complete this page.

Employer

Specify the employer for which the employee works.

Employee

Specify the employee for whom you are displaying and/or updating information.

How Do I…

Continue to the topic list for this employee	Press Enter.
Save the values in the *Opt* fields as defaults for entering future new hires	Type the value in the *Opt* fields and press F16.
Save the original default values in the *Opt* fields	Press F5.
Clear the values in the *Opt* fields	Press F17.
Exit to the menu	Press F3.

Displaying Selected Information for This Employee

On the Employee Topic List selection page, you can select for update and/or display one or more listed topics for the specified employee.

Your user security information specifies which types of employee information appear in this selection list, as well as their order.

How Do I…

Select a listed topic to update and then return to the topic list	Type **2** in *Opt* and press Enter. Process each displayed page in accordance with the actions specified as available on that page. When you exit the last topic, you return to the topic list.
Select a listed topic to display and then return to the topic list	Type **5** in *Opt* and press Enter. Process each displayed page in accordance with the actions specified as available on that page. When you exit the last topic, you return to the topic list.

How Do I…	
Exit to the menu	Press F3.

Using Previous Employment Inquiry

You use this function to search for employees within a specified employer.

After the system identifies the employees that meet your search criteria, you can display the following information for each selected employee:

- Previous Employment History Data
- Basic Data
- On-the-Job Training Data
- Qualifications
- Formal Education Data
- Training Data
- Personnel Data

WARNING! The *Prev Employment History Inquiry* function sorts employee records interactively. Consequently, searches done across a large employee database affect system performance by slowing down response time and processing speed for you and other users.

Follow these steps to use the *Prev Employment History Inquiry* function:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Display Employee Data*.
3. Select *Prev Employment History Inquiry* [PEHI].

   The system displays the first Employee Inquiry screen as shown in Figure 12-3.

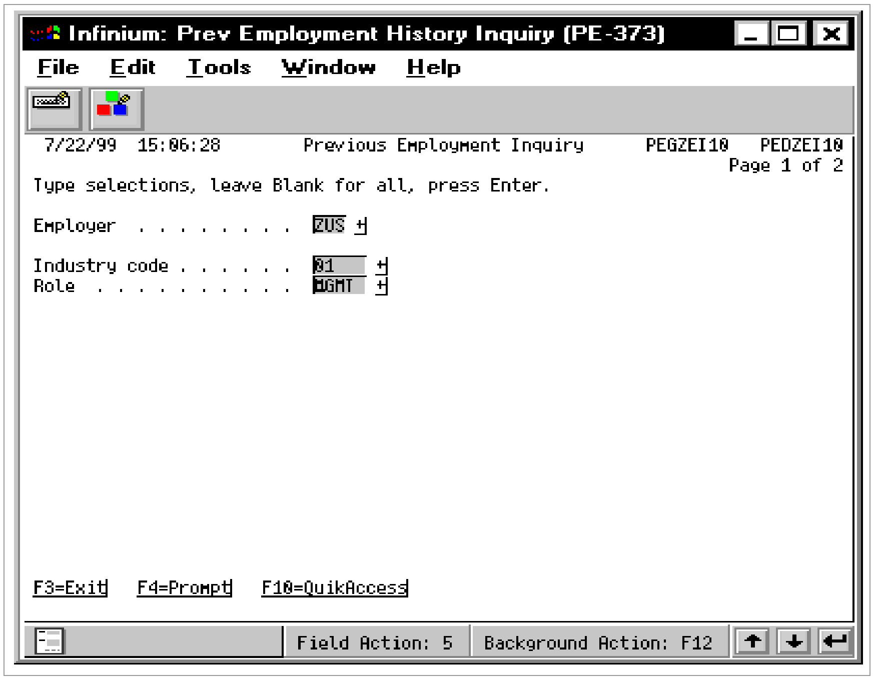


Figure 12-3: Previous Employment Inquiry screen 1 of 2

4 Use the following information to complete the fields on this screen:

Employer

Type the code that identifies the employer for which you want to display employees.

Industry code

Type a valid industry code. Use this field to limit your search to employees who worked only in the industry identified.

Role

Type a valid role code that defines the kind of work the employee performed at his or her previous employment. Use this field to limit your search to employees who worked only in the role identified.

5 Press Enter to display a list of matching employees as shown in Figure 12-4.

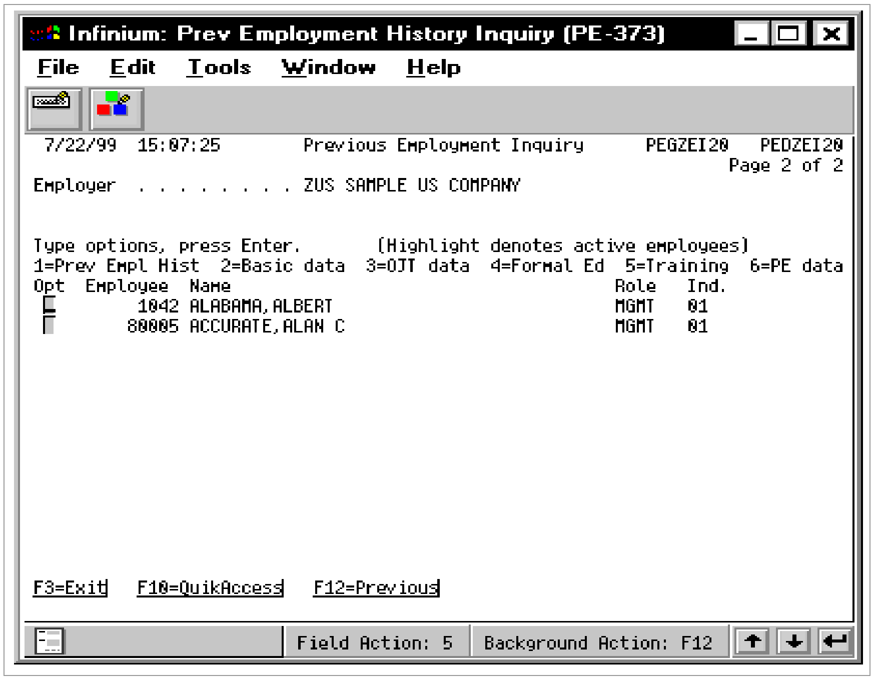


Figure 12-4: Previous Employment Inquiry screen 2 of 2

6 Use the following information to view the data of employees displayed on this screen:

This screen displays a list of employees who satisfy the search criteria you specified on the preceding screen. You can display additional information about each employee by typing one of the following values in the *Opt* field next to a particular employee.

Value	The System Displays:
1	Previous employment history data, type **5** in the *Opt* field of the previous employment history data you want to display
2	Basic data
3	On-the-job training data, including skills, internal and external training information
4	Education data, including formal education and tuition reimbursement information
5	Training data (from Infinium TR)
6	Personnel data

7 After you type a value in the *Opt* field, press Enter to display the specified information. Press Enter to page through the screens you selected.

8 After you view all of the selected employee information, press F3 to return to the list of matching employees shown in Figure 12-4. You can use the *Opt* field to display detailed information for another employee, press F12 to return to the initial prompt screen for the *Employee Inquiry* function, or press F3 to return to the Infinium HR main menu.

Working with Display Employee Data Functions

You use the *Display Employee Data* functions listed below to view employee information on-line. You cannot use any of the display functions to update employee information with the exception of the *Display EE Age and Seniority Calc* function. See the “Updating Additional Employee Data” chapter in this guide for details on how to update the employee information contained in these displays.

The following table describes the options within the *Display Employee Data* function. The ER and EE columns indicate if you can use the *Employer* and *Employee* fields to select information for the display.

Function	ER	EE	Description
Display Employee Data	Yes	Yes	Can also select by levels. Displays list of multiple employees. Can select basic and personnel data for a specific employee.
Display Education Data	Yes	Yes	Shows education data, skills associated with education data and tuition reimbursement information.
Display On-Job Training Data	Yes	Yes	Can also select by skill and then display employees who possess specified skill.
Display Prev Employment History	Yes	Yes	You can display an employee’s previous employment information such as the company name, position held and salary earned.
Display Property Data	Yes	Yes	Can also select by property code.
Display Dependent Data	Yes	Yes	Can also select by relationship code or dependent birth month and year.
Display Automobile Data	Yes	No	Specify if display is sorted by auto make or license plate number.
Display User Defined Data	Yes	Yes	Shows information for the user data fields you elect to utilize.
Display Foreign National Data	Yes	Yes	Can also display all employees with foreign national salary data.

Function	ER	EE	Description
Display Ticklers	Yes	Yes	Can also display by user or log date.
Display Blood Type	Yes	No	Select by blood type
Display Skills Data	Yes	Yes	Can also display by skill code or combination of skill and task code.
Display Skills Inventory	No	No	Select by skill code, task code, relocation code, degree or license code. Can view basic, personnel, education and on-job training data. Can print multi-page Employee Profile report.
Display Purged Employees	No	No	Can select by employee name, tax identification number or termination date.
Display Tuition Reimbursements	Yes	Yes	Can also select by date, reimbursement code or can display all employees who received a tuition reimbursement.
Display EE Age & Seniority Calc	Yes	Yes	You can display a system calculated age and seniority of an employee. The employee's total of seniority years is associated with six dates.

The following section provides detailed information on how to use the *Display Employee Data* function and provides an overview of how to use the other display functions included in the table above.

Displaying Employee Data

You use this function to view the basic data and personnel data records of a specific employee. You can also display a list of all employees assigned to a particular level or all employees within a specified employer. You can select an employee from this list and review his or her basic data and personnel data information.

Follow these steps to use this function:

1 From the Infinium HR main menu select *Employee Data.*

2 Select *Display Employee Data.*

3 Select *Display Employee Data* [DED]. The system displays the screen shown in Figure 12-5.

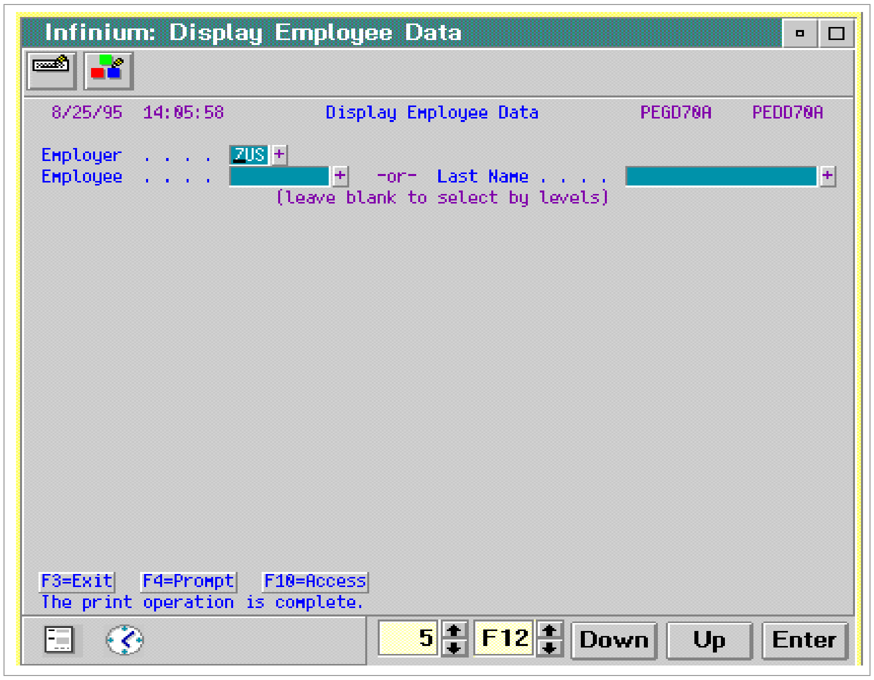


Figure 12-5: Display Employee Data prompt screen

4 Use the following information to complete this screen:

You must specify an employer.

To view the basic and personnel data information for a particular employee, type his or her employee number in the *Employee* field. If you do not know the employee's number, type some or all of his or her last name in the *Last Name* field. Then press F4.

The system displays a list of employees whose last names correspond to the name you specified. Scroll to the employee whose information you want to display, type any character in the *Opt* field next to his or her name, and then press Enter. The system displays the Display Employee Data prompt screen and fills in the employee's number and name. Press Enter. The system displays the prompt screen shown in Figure 12-7. You can view basic data or personnel data for the specified employee.

If you leave the *Employee* and *Last Name* fields blank and press Enter, the system displays the second prompt screen as shown in Figure 12-6.

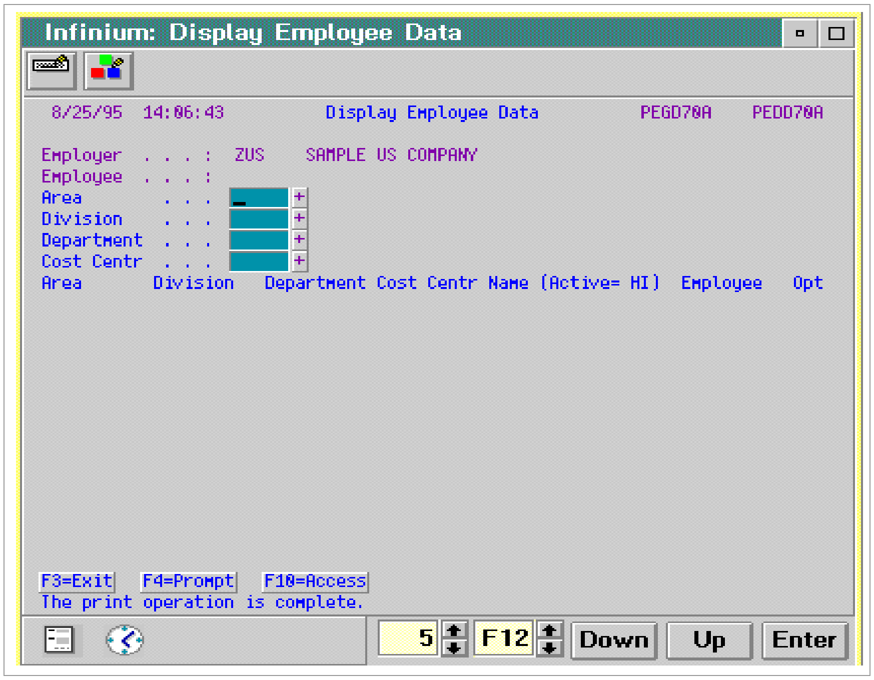


Figure 12-6: Display Employee Data second prompt screen

5 Use the following information to complete the fields on this screen:

The system displays the level descriptions defined for the specified employer. To display a partial list of employees in this employer, you can type the code that represents a particular level in one or more of the level description fields. Then press Enter. The system displays employees assigned to the specified level(s) as shown in Figure 12-7.

Leave all of the level description fields blank and press Enter to display an alphabetical list of all employees in the specified employer.

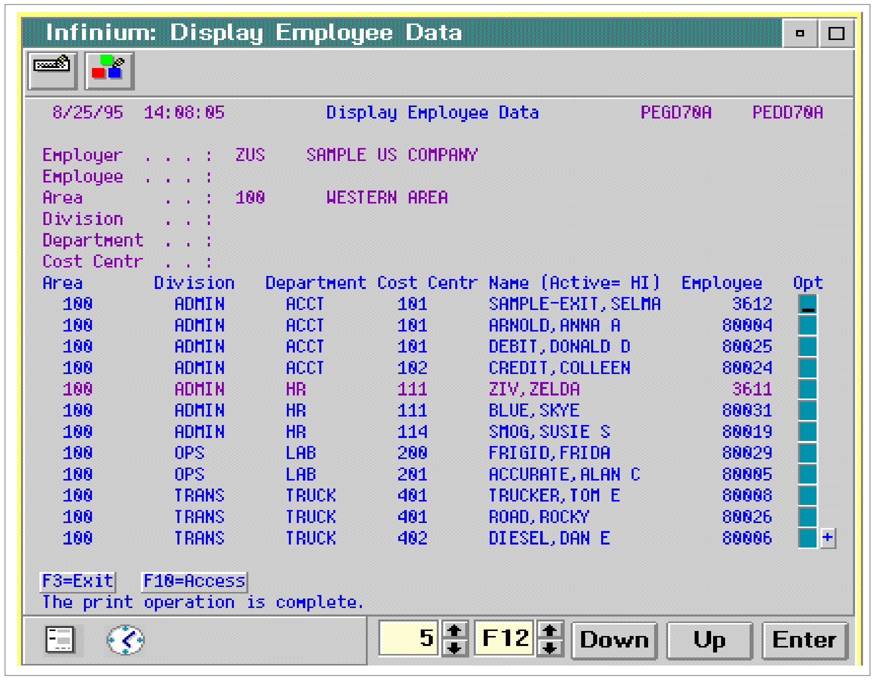


Figure 12-7: Display Employee Data third prompt screen

6 Use the following information to complete the fields on this screen:

Type any character in the *Opt* field next to a particular employee to display the prompt screen for that employee as shown in Figure 12-8.

```
 2/08/00  11:45:09        Display Employee Data            PEGD70A    PEDD70A

Employer  . . . :  ZUS     SAMPLE US COMPANY
Employee  . . . :      80031     SKYE BLUE
Address . . . . :  2093 CLOUD STREET
City/Town . . . :  HEAVENLY
State/Province  :  CA                    Postal Code . . :  90109

Area        . . :  100      WESTERN AREA
Division    . . :  OPS      OPERATIONS
Department  . . :  SKI      MEGA MOUNTAIN SKI RESORT
Cost Centr  . . :  100      E-Z SKI SCHOOL
                  Opt            Available options
                   =      Basic Data
                   _      Employee Personnel Data

F3=Exit   F10=Access
```

Figure 12-8: Display Employee Data fourth prompt screen

7 Use the following information to complete the fields on this screen:

Type any character in the *Opt* field next to the basic data and/or the personnel data options for the selected employee. Press Enter to display the specified information or press F3 to exit from this function.

If you select basic data, the system displays the screen shown in Figure 12-9. If you select personnel data, the system displays the screen shown in Figure 12-10.

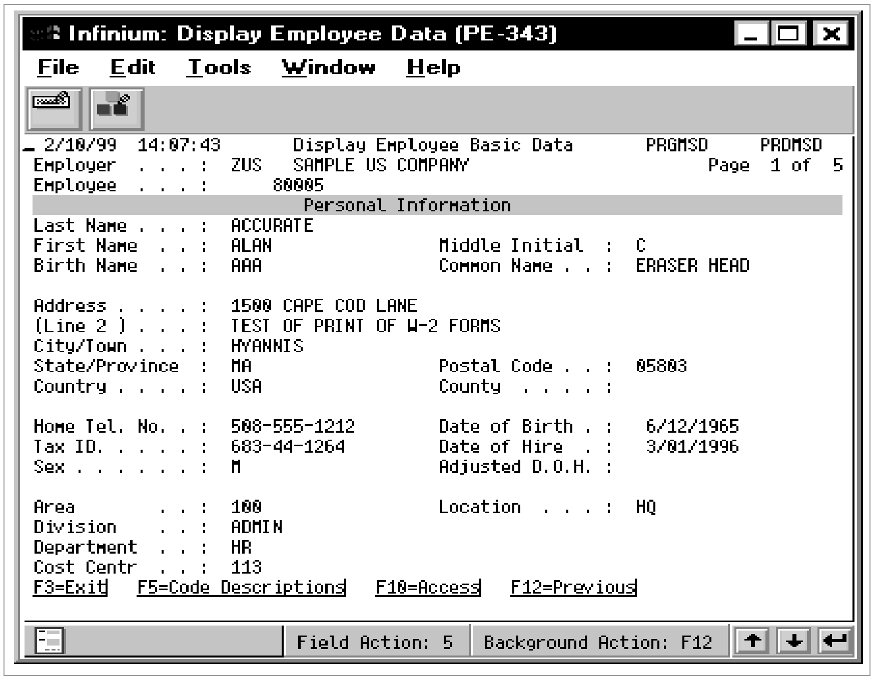


Figure 12-9: Display Employee Basic Data

8 Use the following information to view the employee record.

Press Enter to display each page of the employee's basic data information. Depending on your security restrictions, you can view up to six pages of employee information.

Press F5 to view the descriptions associated with the code values displayed on each screen. When you press F5 on Screen 4 of the basic data record, the system also displays the minimum, midpoint and maximum of the employee's assigned salary range.

If you also chose personnel data on the fourth prompt screen shown in Figure 12-8, the system automatically displays the first screen of personnel data after you view all of the employee's basic data record. A sample of the Display Personnel Data screen is shown in Figure 12-10.

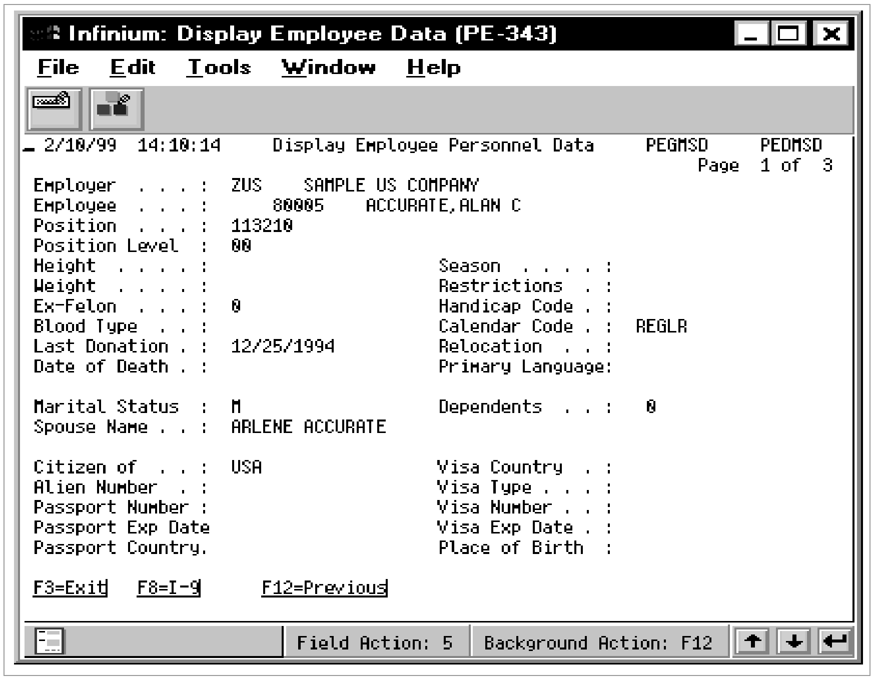


Figure 12-10: Display Employee Personnel Data

9 Use the following information to view the employee record:

Press Enter to display each page of the employee's personnel data information. You can view three pages of employee information.

Press F8 to view the employee's Employment Eligibility information, known as I-9 information. This information applies only to employees in U.S. companies.

10 After you view all three pages of personnel data for a particular employee, the system displays the prompt screen shown in Figure 12-8. Press F3 to exit from this function. The system displays the prompt screen for the *Display Employee Data* function as shown in Figure 12-5.

Follow the preceding instructions to display the personnel data record of another employee or press F3 to return to the Infinium HR main menu.

Using Additional Employee Display Functions

Most of the Employee Display functions listed in the table beginning on page 46 of this chapter require that you specify an employer. Some displays also require that you specify a particular employee; other displays use selection criteria related to the type of information that you view with the function. For example, when you use the *Display Property Data* function you can specify an employee number or a property code to restrict the information that you view.

Refer to the information in the Infinium HR Help screens for details about each field, screen and function. If you are unsure whether a particular field is required on a prompt screen, leave it blank and press Enter. If you must complete the field, the system will highlight the field and advise you that it is required in an error message at the bottom of the screen.

Displaying an Employee's Age and Seniority

You can display a system calculated age and seniority for an employee based upon a specified date.

Entering Data to Display an Employee's Age and Seniority

1 From the Infinium HR main menu select *Employee Data*.

2 Select *Display Employee Data*.

3 Select *Display EE Age & Seniority Calc* [DEEY]. The system displays the screen shown in Figure 12-11.

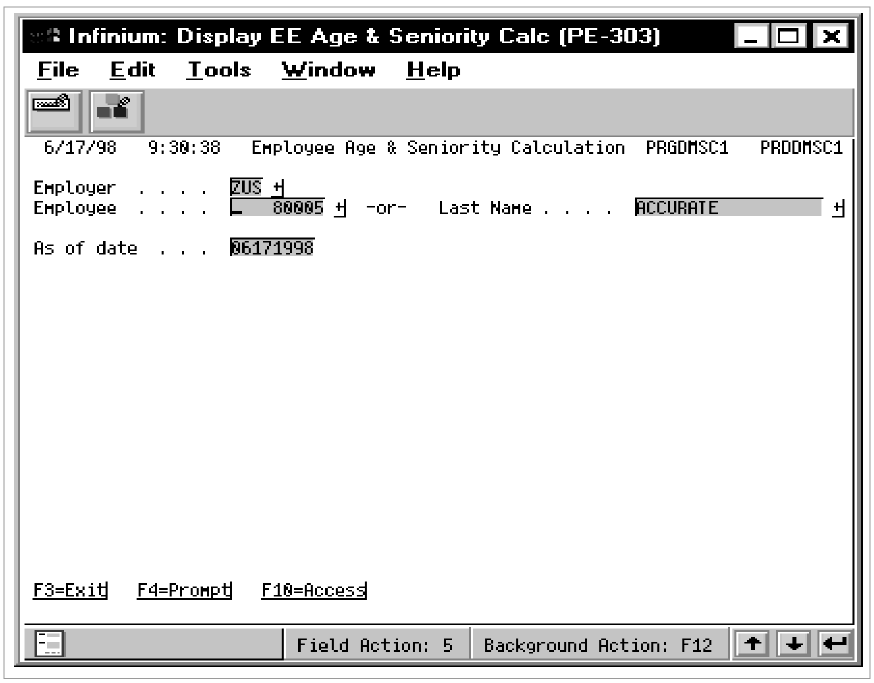


Figure 12-11: Employee Age & Seniority Calculation prompt screen

4 Use the following information to fill in the fields on this screen:

Employer

Type the value that identifies the employer whose employee's records you are displaying.

Employee or Last Name

Type the value that identifies the employee or the employee's last name whose records you are displaying.

As of date

Type the date you want the system to use to calculate the employee's date of birth and length of service for the dates available on the system.

5 Press Enter. The system displays the screen shown in Figure 12-12 showing the employee's age and seniority information.

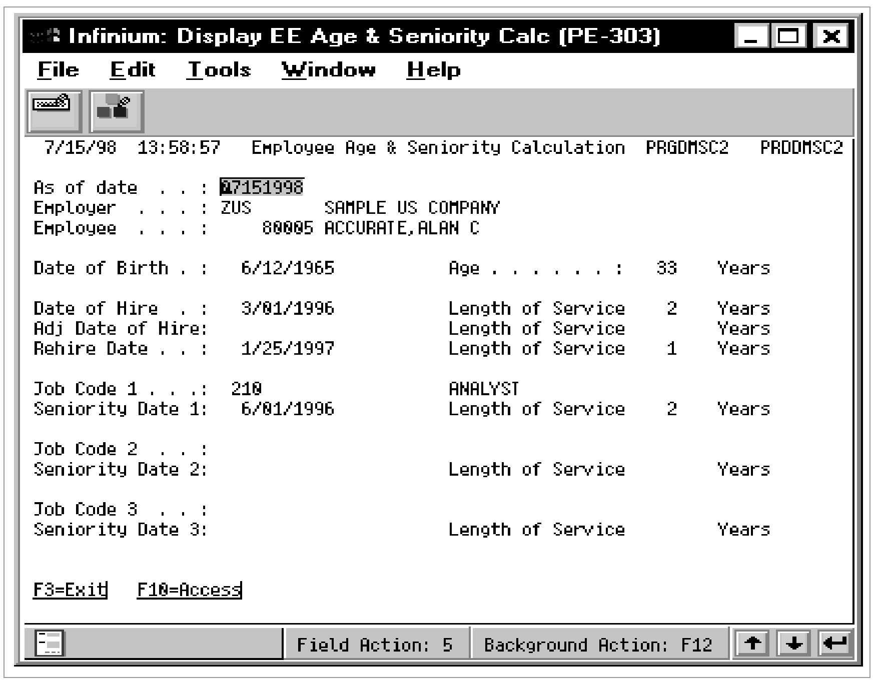


Figure 12-12: Employee Age & Seniority Calculation screen

You can type a new date in the *As of date* field to re-calculate. Then press Enter for the system to update the information the screen.

Notes

Chapter 13 Printing Employee Data

13

This chapter describes information about printing employee data.

The chapter consists of the following topics:

Overview of Employee Reports

Infinium HR contains many standard reports that provide you with listings of employee information. This chapter provides you with general information about how to produce employee reports found within the *List Employee Data*, *Administrative Reporting* and *Wage and Salary Administration* functions.

Some of the reports that you generate may contain sensitive information. For those reports that include sensitive data such as the employee's tax ID, you may need to change the restriction level. If you have the proper authority, you can override the restriction level and specify a higher restriction level for access to the sensitive information.

The appropriate screens include the F7 = Override function key. When you press F7, the system displays the Override Masking Defaults window. If you have the proper level of authority, you can specify an access level that is higher than the default access level.

You use the *Update Entity Controls* function to specify the level of access required to view the sensitive information. You use the *Update User Security* function to associate an access level with an employee.

The "Printing Employee History" chapter provides information on how to generate reports of history transactions you entered through the *Enter Personnel Actions* function.

You can view samples of most of the reports in this chapter in the *Infinium HR Reports* book.

Overview of List Employee Data Reports

You use reports within the *List Employee Data* function to print employee information you entered through the *Enter New Hire* or *Update Employee Data* functions with one exception. You can also use the *Personnel Purge Functions* option to generate the *List Employees Purged* report. This report contains summary information about terminated employees you removed from your database using an option within the *Personnel Purge Functions* option.

The following table lists the reports found within the *List Employee Data* function and provides comments on key features of each report. It also describes the list or Employees Purged report. In most cases, you can leave the *Employer* field on the selection screen blank to include information for employees in all employers in your database.

Most reports also allow you to include or exclude information about terminated employees from appearing in the report. You can also specify that only employees terminated with a particular termination reason code are to be included in the report.

Some of the reports that you generate may contain sensitive information. For those reports that include sensitive data such as the employee’s tax ID, you may need to change the restriction level. If you have the proper authority, you can override the restriction level and specify a higher restriction level for access to the sensitive information.

The appropriate screens include the F7 = Override function key. When you press F7, the system displays the Override Masking Defaults window. If you have the proper level of authority, you can specify an access level that is higher than the default access level.

You use the *Update Entity Controls* function to specify the level of access required to view the sensitive information. You use the *Update User Security* function to associate an access level with an employee.

Function	Selection Criteria	Comments
List Employees Data [LE]	Employer, Levels	Prints 1/2 page of Basic & Personnel Data per employee.
List Employees by Number [LEEN]	Employer, Sex	Can include up to 7 code types on report.

Function	Selection Criteria	Comments
List Employees by Job Code [LEJC]	Employer, Job Code, Sex	Can include up to 4 code types on report.
List Employees by Last Name [LELN]	Employer, Sex	Can include up to 7 code types on report.
List Employees by Report Level [LERL]	Employer, Levels, Sex	Sorts employees by level, then by last name. Includes sub-totals by levels. Can include up to 4 code types on report.
List Education Data [EER]	Employer, Beginning and Ending Dates	Sorts by employee, then by course date. Also includes tuition reimbursement and skills data.
List On-Job-Training Data [OJTR]	Employer, Beginning and Ending Dates	Includes internal and external training courses and skills data.
List Prev Employment History [LPEH}	Employer, Employee Reason for leaving code and Industry code	Sorts by employee and start date of previous employment and allows selection of employees by reason for leaving and/or industry code.
List Employees Property [LEP]	Employer, Levels, Property Code, Suspense Date	Sorts by employee number. Includes description, dollar value and issue date company property was assigned to employee.
List Employees Dependents [LED]	Employer or Employer Group, Levels, Relationship Code	Sorts by employee number or levels. Includes dependent birth date and age.
List Automobile Data [EA]	Employer or Employer Group	Sorts by Auto Make/Model or License Plate Number. Also includes parking permit and assigned parking spot data.
List Eligibility Data (US) [EED]	Employer or Employer Group, Levels, Hire Date	Selects employees with or without I-9 data. Produces a report that shows I-9 information.
List Foreign National Data [LFN]	Employer or Employer Group, Employee, As of Date	Includes compensation data of employees on foreign assignments.
List Employees Purged [LPE]	Employer, Termination Date	Can sort by last name or tax identification number. Includes employee name, tax ID number, former employee number, hire and termination dates, term, reason code and home address.

Follow these steps to access the reports shown in the preceding table:

1 From the Infinium HR main menu select *Employee Data.*

2 Select *List Employee Data.*

3 Select any of the functions listed in the preceding table.

Overview of Administrative Reporting Reports

There are a variety of standard reports within the *Administrative Reporting* function. You can use them to produce an employee profile that is a complete report of information in the basic and personnel data records of a particular employee or to print specific information such as the hire date or seniority date of a group of employees.

There are three options within the *Administrative Reporting* function:

- *Employee History*
- *Employee Profiles*
- *Miscellaneous Reporting*

Each option contains two or more standard reports that you can use to print employee information.

The following tables list the reports found within the *Administrative Reporting* function and provide comments on key features of each report. In most cases, you can leave the *Employer* field on the selection screen blank to include information for employees in all employers in your database.

Most reports also allow you to include or exclude information about terminated employees from appearing in the report. You can also specify that only employees terminated with a particular termination reason code are to be included in the report.

Using Employee History Reports

You find the following two reports in the *Employee History* option within the *Administrative Reporting* function.

Function	**Selection Criteria**	**Comments**
Seniority Date Listing [SDL]	Employer, Levels, Job Code, Seniority Date Beginning and Ending Dates	Uses first *Seniority Date* field in basic data. Four sorting options available using seniority date, levels and job code.
Date of Hire Anniversary Listing [DHAL]	Employer, Levels, Date of Hire Anniversary	Uses *Date of Hire* field in basic data. Two sorting options available using hire date or levels. Can print values for up to 5 code types in the hire date sort.

Follow these steps to access the two reports shown in the preceding table:

1. From the Infinium HR main menu select *Administrative Reporting.*
2. Select *Employee History.*
3. Select one of the reports listed in the preceding table.

Using Employee Profiles Reports

You find the following two reports within the *Employee Profiles* option within the *Administrative Reporting* function.

Function	Selection Criteria	Comments
List Employee Profiles [PEP]	Employer, Hire Date, Employee, Levels, Termination Code	Prints a 3 page listing of data in the basic and personnel data records for each selected employee; use F8 to submit the report for processing.
List Profile Worksheets [PPW]	Employer	Prints a generic 5 page report with basic and personnel data field names and blanks to manually complete the information; specify how many copies to generate.

Follow these steps to access the reports in the preceding table:

1. From the Infinium HR main menu select *Administrative Reporting.*
2. Select *Employee Profiles.*
3. Select one of the reports listed in the preceding table.

Using Miscellaneous Administrative Reports

You find the following eight reports within the *Miscellaneous Reporting* option within the *Administrative Reporting* function.

Function	Selection Criteria	Comments
Selective Mailing Labels [SML]	Employer, Employee, Levels, 28 Code Types, Date of Birth, Pay Type, Pay Frequency, Shift Code, Postal Code	Produces name or name and home address labels. Designed for 2 x 3” single pin-feed style label. Can sort by employee number or last name. Need to establish printer control record on Infinium AM.
Internal Telephone Directory [ITD]	Employer	Uses *Office Tel. No.* field in basic data. Sort by last name or telephone number.
Employee Telephone Directory [EHTL]	Employer, Levels	Uses *Home Tel. No.* field in basic data. Sort by last name or telephone number.
List Veterans [VR]	Employer, Veterans Code	Uses *Veterans Code* field in personnel data. Can print up to 5 additional code values.
List Spouses [SL]	Employer	Uses *Spouse Name* field in personnel data. Can print up to 4 additional code values.
List Birthdays [BL]	Employer, Levels, Beginning and Ending Birth Dates	Uses *Date of Birth* field in basic data. Can specify date from which system computes employee age. Can print up to 5 additional code values. Code types LOT, NOC, SFT, SIC, U11, and U12 are not supported.
List Restricted Parking [RPR]	Employer, Parking Lot Assignment	Lists personal car model and license plate information along with parking lot and assigned space.
List Skills/Tasks Available [STL]	Employer, Skill Code, Task Code, Beginning and Ending Dates	Sorts by skill and task codes; within task code, lists employees by last name.

Follow these steps to access the reports in the preceding table:

1 From the Infinium HR main menu select *Administrative Reporting.*

2 Select *Miscellaneous Reporting.*

3 Select one of the reports in the preceding table.

Overview of Wage and Salary Administration Reports

Three reports in the *Wage & Salary Administration* function that list employee compensation information:

- *List Compensation By Job Code* - sorts employees by job code
- *List Compensation By Sal Range* - sorts employees by salary range
- *List Compensation By Levels* - sorts employees by their level(s)

All of the reports contain similar information including the following:

- Employee number
- Employee name
- Lowest level
- Position title
- Pay type
- Most recent salary change reason code value
- Assigned salary range minimum, midpoint and maximum
- Current personnel base rate
- Quartile
- Compa ratio
- Most recent performance rating

All of the reports provide sub-totals on the sort field along with employer totals and averages of the base rates of employees and of compa ratios. For example, the *List Compensation by Job Code* report provides a sub-total and average of employee base rates within each job code.

All of the reports can sort employees into full time and part time categories. You specify which employees are full time employees by entering a value in the *Full Time Hrs/Hr.* field on the selection screen that indicates the annual scheduled hours of a full time employee in the selected employer.

You can vary the full time hours value when you run the report so that you are able to generate reports that show compensation for different types of full or part-time employees.

If you state the value in the *Base Rate* field in the basic data record differently for different types of employees, you can use the *Convert to Annual* field on the report selection screens to annualize all base rates. For example, you state the base rates of hourly employees on an hourly basis and the base rates of salaried employees on a monthly basis. You can convert all base rates to an annual amount so that you can obtain meaningful totals and comparisons of data on the report.

The following section contains information on how to generate the *List Compensation By Job Code* report. Selection screens for the *List Compensation By Sal Range* and *List Compensation By Level* reports are identical with the exception of the key selection and sort field, which is identified in the report title.

Generating the List Compensation by Job Code Report

Follow these steps to run the *List Compensation By Job Code* report:

1. From the Infinium HR main menu select *Wage & Salary Administration.*
2. Select *List Wage & Salary Data.*
3. Select *List Compensation By Job Code* [CAJC]. The system displays the screen shown in Figure 13-1.

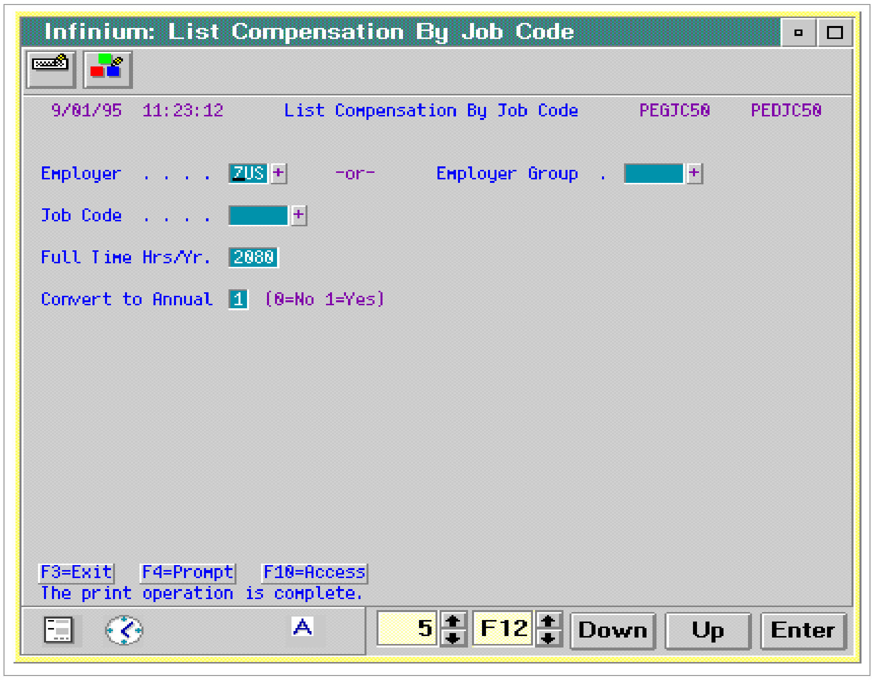


Figure 13-1: List Compensation By Job Code selection screen

4 Use the following information to fill in the fields on this screen:

Employer

Type the code that represents the employer for which you want to generate the compensation report. You must type a value in this field or in the *Employer Group* field.

Employer Group

Type the code that represents the group of employers for which you want to generate the compensation report. You use code type **ERG** to define values for this field. See the *Infinium HR Guide to Controls* for details on how to establish employer groups. You must type a value in this field or in the *Employer* field.

Job Code

Type a value that identifies a specific job for which you want to include assigned employees on the report or leave this field blank to include all job codes and employees. Press F4 to display a list of valid job codes.

Full Time Hrs/Yr

Use this field to define the number of annual hours that represent a full time employee. The report sorts employees into part time and full time categories based on this field. The system computes each employee’s annual hours by multiplying the *Regular Hours* field in the employee's basic data by the *Scheduled Pay Pds* field in the basic data record, and then compares the result to the value you entered in this field. Employees are considered part-time if their annual scheduled hours are less than the full time value you specified.

For example, you can enter **2080** in this field to indicate that employees who are scheduled to work 2080 or more hours annually are full time; employees whose scheduled hours equate to less than 2080 hours per year are considered part time.

Convert to Annual

Type **1** if you want to view all salaries and salary range amounts in annual figures. If you state the value in the *Base Rate* field in the basic data record differently for different types of employees, this field allows you to obtain meaningful information and comparisons on your report.

For example, if you state the base rates of hourly employees on an hourly basis, the base rates of salaried employees on a biweekly basis and the base rates of executives on a monthly basis, the totals and averages on the report will not be useful unless all base rates are stated on the same basis.

The system uses the *Base Frequency* field in basic data to interpret the value in the *Base Rate* field. If the value in the *Base Frequency* field is not **A**, the system uses the values in the *Regular Hours, Scheduled Pay Pds, Pay Type* and *Pay Frequency* fields to annualize the value in the *Base Rate* field for the report.

5 After you type information in the selection field(s) you require, press Enter. The system produces the following message at the bottom of the List Compensation By Job Code selection screen and returns you to the Infinium HR main menu:

Building submission request...

The system uses batch processing to generate the List Compensation By Job Code report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen. You can view or print this report using options on these screens.