Infor Infinium HCM Human Resources Guide to Processing

Volume 2

Publication Information

Release: Infor Infinium HCM 11.1.17

Publication date: October 19, 2021

Document code: INFHRPY10V2_ALL_03

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Chapter 14 Entering Personnel Actions

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This chapter describes the process for entering personnel actions.

The chapter consists of the following topics:

Overview of Entering Personnel Actions

This chapter provides you with information on how to use the *Enter Personnel Actions* function to maintain employee information after you enter the employee's hiring information into Infinium HR. Several of the preceding parts in this guide provide information on how to directly update employee information. You can directly update information in many of the employee's records including education data, on-the-job training data, user-defined data and so on.

However, when you make direct changes to fields in the employee's basic data, personnel data or payroll data, the system does not save the prior information and employee history is lost. If the new information is the result of key employment events, you can use the *Enter Personnel Actions* function to build an on-line history for the employee and indirectly update the necessary information in the employee's basic data, personnel data and payroll data records.

You use the *Enter Personnel Actions* function to update employee data in Infinium HR and Infinium PY with new information when the employee receives salary changes, transfers, promotions, performance reviews, status changes, is terminated, rehired and so on. All personnel action transactions automatically create historical records for analysis and reporting.

Most personnel action transactions are time-sensitive. When you enter transactions that should take effect on or before the date you enter them, the employee's record is updated immediately. When you enter transactions that should become effective after you enter them, you use the *Mass Update Personnel Actions* function to activate them when they are due.

You use the *Display Employee History* function to review an employee's personnel action transactions online. You can use several different standard reports to print personnel actions history for one employee or for many employees.

Objectives

When you complete this chapter, you should be able to:

- Enter personnel actions
- Understand how the system uses personnel action transactions to update fields in basic data and personnel data

- Understand the effect of personnel actions on Infinium PY

Understanding Personnel Actions

You use the *Enter Personnel Actions* function to record key employment events for employees. You use a unique pre-defined transaction type to enter information for each employment event listed below. Infinium HR uses the transactions you enter to build an on-line history for each employee and uses the information you enter in each transaction to update the appropriate fields in the employee's basic data, personnel data and payroll data records.

You enter the following transactions in the *Enter Personnel Actions* function:

Transaction	Code	Description
Performance Review	**RE**	Use to record an employee's performance review date, rating and date of next scheduled review.
Salary Change	**SC**	Use to record a change in an employee's personnel base rate and payroll rate(s).
Promotion	**PR**	Use to record an employee's movement from one position to another within the same employer.
Transfer	**TR**	Use to record an employee's movement from one position to another within the same or different employers.
Demotion	**DM**	Use to record an employee's movement from one position to another within the same employer.
Status Change	**ST**	Use to change an employee's assigned status code, to place an employee on a leave of absence or layoff, or to return an employee from a leave of absence or layoff.
Blood Donation	**BD**	Use to record the date an employee donates blood.
Hire	**HI**	Use to review or update an employee's new hire transaction, which is created by the *Enter New Hire* function. You do not use this option to hire employees.
Termination	**TE**	Use to record an employee's termination date and reason, along with rehire eligibility.
Rehire	**RH**	Use to reactivate a terminated employee's record on HR2000.
Work Action	**WA**	Use to record miscellaneous events such as service awards, disciplinary actions, grievances or arbitrations, and so on.
Personal Change	**PC**	Use to record changes in an employee's name, address or marital status.

Fields Affected by Personnel Actions

When you enter transactions in the *Enter Personnel Actions* function, you generally update information in the employee's basic data record, which is shared by Infinium HR and Infinium PY users. Depending on the transaction, you can also update information in the employee's personnel data record in Infinium HR or payroll data record on Infinium PY.

The following table illustrates the fields in the basic data, personnel data and payroll data records that are updated by each personnel action.

Personnel Action Transaction Type	Affected Fields	Location of Fields
Performance Review	*Next Review* *Next Review Data*	Basic Data, Screen 2
Salary Change	*Base Rate* *Base Frequency* *Pay Frequency* *Regular Hours* *Scheduled Pay Pds* *Pay Type* *Last Increase* *Increase Reason* *Last Increase %* *Last Increase Amt* *Previous Rate* *Quartile* *Comp Ratio*	Basic Data, Screen 4
	Payroll Rate 1, 2, 3	Payroll Data, Scr. 1
Promotion Transfer Demotion	*Levels 1, 2, 3, 4* *Location*	Basic Data, Screen 1

Personnel Action Transaction Type	Affected Fields	Location of Fields
	Position *Position Title* *Job Code 1* *Seniority Date* *EEO Category* *EEO-4 Function* *Union* *Shift* *PE Benefit Group* *Union* *Training Group* *Next Review* *Next Review Data*	Basic Data, Screen 2
	Security Group *Workers Comp.* *Labor Category*	Basic Data, Screen 3
	Scheduled Pay Pds *Regular Hours* *Pay Grade* *Salary Range* *Salary Quartile* *Comp Ratio*	Basic Data, Screen 4
	Termination (for inter-company transfers) *Termination Date* (for inter-company transfers) *Last Day Worked* (for inter-company transfers)	Basic Data, Screen 5
	Job Change Date *Job Code* *Position* *Level Change Date* *Levels 1, 2, 3, 4* *Employer* *Employee*	Personnel Data, Previous Information section on Screen 3
	Annual Base Rate	Hidden PYYBAS field available for query through Infinium QY

Personnel Action Transaction Type	Affected Fields	Location of Fields
	Payroll Cycle *Auto Pay Group* *PY Auth Group*	Payroll Data, Screen 1
	Current State *SUTA State* *Current Misc Loc* *Current County* *Current City* *Curr School Dist.* *Home Tax Co (multi-tax only)*	Payroll Data, Screen 2
Status Change	*Status* *Previous Status* *Status Chg Date*	Basic Data, Screen 2
	Leave *Length of Break* *Leave Date* *Date of Return* *Layoff?*	Basic Data, Screen 5
	Annual Base Rate	Hidden PYYBAS field available for query through Infinium QY
Blood Donation	*Last Donation*	Personnel Data, Screen 1

Personnel Action Transaction Type	Affected Fields	Location of Fields
Hire	*Hire Date* *Levels 1, 2, 3, 4* *Location* *User Field 1* *User Field 3*	Basic Data, Screen 1
	Position *Position Title* *EEO Category* *Job Code 1* *Union* *Status* *Shift* *PE Benefit Group*	Basic Data, Screen 2
	Labor Category *Worker's Comp.*	Basic Data, Screen 3
	Base Frequency *Pay Type* *Base Rate* *Scheduled Pay Pds* *Regular Hours* *Pay Grade* *Salary Range* *Salary Quartile* *Comp Ratio*	Basic Data, Screen 4
	Payroll Cycle *Auto Pay Group*	Payroll Data, Screen 1
	Current County *Home County* *Current City* *Home City* *Curr School Dist* *Home School Dist* *Current Misc Loc* *Home Misc. Loc* *Current State* *Home State* *SUTA State* *Home Tax Co (multi-tax only)*	Payroll Data, Screen 2

Personnel Action Transaction Type	Affected Fields	Location of Fields
Rehire	*Levels 1, 2, 3, 4* *Location*	Basic Data, Screen 1
	Position *Position Title* *Job Code 1* *Seniority Date* *Union* *Status* *Previous Status* *Status Chg Date* *Shift* *PE Benefit Group* *Next Review* *Next Review Date*	Basic Data, Screen 2
	Labor Category *Worker's Comp*	Basic Data, Screen 3
	Base Frequency *Pay Type* *Base Rate* *Scheduled Pay Pds* *Regular Hours* *Pay Grade* *Pay Grade Date* *Step* *Step Date* *Next Step* *Next Step Date* *Salary Range* *Quartile* *Comp Ratio*	Basic Data, Screen 4
	Removes information from: *Termination* *Termination Date* *Rehire* *Last Day Worked Base*	Basic Data, Screen 5
	Payroll Cycle *Auto Pay Group* *Rate* *PY Auth Group*	Payroll Data, Scr. 1

Personnel Action Transaction Type	Affected Fields	Location of Fields
	Current State *SUTA State* *Curr. Misc. Loc* *Curr. County* *Curr. City* *Curr. Sch. Dist* *Home Tax Co* (for multi-tax only)	Payroll Data, Screen 2
Termination	*Termination* *Termination Date* *Keep Permanently?* *Rehire* *Last Day Worked*	Basic Data, Screen 5
Work Action	Historical only - no fields updated in Basic or other data records.	Not applicable
Personal Change	*Last Name* *First Name* *Middle Initial* *Address* *City/Town* *State/Province* *Postal Code* *Country* *County* *Home Tel. No.* *User Field 1* *User Field 3*	Basic Data, Screen 1
	Marital Status *Spouse Name*	Personnel Data, Screen 1
	Previous Information: *Name* *Address* *(Line 2)* *City/State*	Personnel Data, Screen 3
	Home County *Home City* *Home School Dist* *Home Misc. Loc* *Home State*	Payroll Data, Screen 2

Effect on Infinium PY

These personnel action transactions affect Infinium PY data:

- Demotion
- Salary Change
- Status Change
- Promotion
- Rehire
- Transfer
- Personal Change

When you enter a salary change transaction for an employee, you can update his or her payroll rates in the payroll data record in Infinium PY. The payroll rates are used by Infinium PY during cycle processing to generate an employee's pay.

Transactions that you use to update an employee's position assignment also affect payroll cycle processing. For example, when you enter a promotion, demotion, transfer, or rehire transaction, you can update the employee's level assignments. Infinium PY typically uses the employee's levels during cycle processing to generate general ledger accounts for charging labor expense; later, the same levels are used to generate employee deductions and employer liabilities.

When you assign an employee to a new position, you can also update the employee's payroll authorization group value. When you change this value, the system automatically updates the employee's income and deduction authorizations. Refer to the next section for additional information about this processing.

When you enter a promotion, demotion, status change or intra-company transfer transaction, the system updates the annual wage base in the payroll master file, PYPMS, if you change an hourly employee's regular hours.

The individual sections that describe each personnel action transaction provide details on how each transaction impacts Infinium PY.

Updating the Employee's Payroll Authorization Group Assignment

If Infinium PY users type **1** or **2** in the *PE Upd PY Auth Gp* field on the payroll employer control, you can automatically update the value in the *PY Auth*

Group field on the employee payroll data record and make corresponding changes to the employee's income and deduction authorizations based on the employee's new payroll authorization group assignment. The updating occurs when you enter the following four transactions using the *Enter Personnel Actions* and *Mass Update PE Actions* functions in Infinium HR:

- Demotion
- Promotion
- Rehire
- Transfer

The system updates the payroll authorization group code value only when:

- The employee is assigned to a new position using one of the transactions listed above and
- The value in the *PY Auth Group* field on the new position differs from the value in that field on the employee's previous position.

If you are allowed to update this payroll information, the system automatically updates the value in the employee's *PY Auth Group* field when you enter one of the above transactions using an effective date that is the same as or before the date on which you type the transaction. When you enter a transaction with an effective date that is after the date on which you type the transaction, the system updates the value in the employee's *PY Auth Group* field and the corresponding income and deduction authorizations when you run the *Mass Update PE Actions* function to process future-dated transactions. See the following "Using Additional Personnel Action Functions" chapter for details on processing future-dated transactions.

If you are not allowed to automatically maintain this payroll information, Infinium PY users must manually change the value in the *PY Auth Group* field when an employee is assigned to a new position and review the changes that Infinium PY automatically makes to income and deduction authorizations based on the new authorization group value.

Updating Locality Information

If you enter **1** or **2** in the *Position Default* field on the Update Employer Controls screen, the default locality information you set up by using the *Update Position Defaults* function is in the current state, current locality and home tax company fields. You can also manually enter and update an employee's current state, current locality and home tax company information when you are processing a rehire, transfer, promotion, demotion or hire transaction.

If you specify a custom program to be used to update locality information on the third Update Employer Controls screen, you can activate that program when you process a rehire, transfer, promotion, demotion, hire, and personal change transaction. The custom program can enter values in the appropriate fields before the personnel action is saved and processed.

If you enter a specific value for state, locality or tax company fields when you process the personnel action, the system updates the appropriate employee's payroll information with the specified changes. If you leave the state, locality and home tax company fields blank, the corresponding values on the payroll master are not changed.

Reviewing the Audit Report

Regardless of whether Infinium PY users manually maintain the employee *PY Auth Group* field and corresponding income and deduction changes or Infinium HR users automatically maintain them, the system automatically generates an audit report of the changes it makes to employee income and deduction authorizations when the payroll authorization group value on the employee payroll data record changes. The system generates the report using interactive processing and assigns printer file name **PYTMBGAU**. You can access this report from the Work with All Spooled Files screen.

You can have the technical member of your staff set up a special printer control override to specify where the audit report prints. Infinium PY users should carefully review the information on this report to ensure that the employee's income and deduction authorizations are correct before they process the next payroll cycle for that employee.

Coordination with Payroll Processing

You should coordinate with the Infinium PY users at your site to ensure that you type personnel actions in advance of the payroll cycle in which the changes should appear or be used. During the begin stage of pay cycle processing, Infinium PY uses the employee's basic data record to create a work record for each employee who is to be paid. The work record includes the employee's name, address and home levels. Therefore, you must enter any name, address or level changes that are to be included in a payroll cycle before the payroll processor executes the *Begin Cycle* option.

For example, if the payroll user executes the *Begin Cycle* option at 8:00 AM each Tuesday, you should complete your entry of personnel actions for the upcoming pay cycle before 8:00 AM on Tuesday.

You can enter salary change transactions for employees after the *Begin Cycle* option has completed. The system uses each employee's payroll rate(s) to calculate pay during the release stage of cycle processing, which occurs several steps after the begin stage. Generally, however, it is best to complete all personnel actions in advance of payroll cycle processing to avoid last-minute errors or coordination problems.

Personnel Action Effective Dates

When you enter Personnel Actions that are effective on or before the entry date, the employee's records are updated immediately. For example, if on 6-5-95 you enter a salary change transaction with an effective date of 6-1-95, the system immediately updates the employee's rate information in Infinium HR and Infinium PY.

If on 7-5-95 you enter a transaction that should take effect on 8-1-95, the system does not update the employee's rate information until you run the *Mass Update Personnel Actions* function and specify an effective date of 8-1-95 or thereafter.

Sequence of Personnel Actions

You can type multiple transactions in one session for an individual employee. For example, you can enter a promotion transaction and a salary change transaction for the same employee by selecting both transactions from the list of options on the Enter Personnel Actions prompt screen. The system displays each transaction record you selected in the sequence listed on the prompt screen. You can specify the same or different effective dates for each transaction.

If an employee receives a promotion and a corresponding salary change, you should enter the promotion transaction before you enter the salary change transaction. When you move an employee from one position to another using the promotion, transfer, demotion or rehire transactions, the system can update the employee's *Salary Range* field. You want the system to use the most current salary range to update the employee's *Comp Ratio* and *Quartile* fields in basic data.

Using Audit Fields

When you use the *Enter Personnel Actions* function, the system updates seven fields in the personnel actions history file (PEPTR) to track information about the user who originally enters a personnel action transaction, as well as the user who subsequently makes changes to an existing transaction.

At present, you can view or print the information in these fields only by using a database utility or by writing a query or custom report. For example, you can use Infinium Query to generate reports of the data in one or more of the audit fields.

The audit fields are as follows:

- *User Entered/Last Update By*
- *Last Time Updated*
- *Last Updated Date - Edited*
- *Last Updated Date - 8 Digit*
- *Last Updated Date - HYF*
- *Last Updated By Workstn*
- *Created By User*

Establishing Code Values for Personnel Actions

Infinium HR uses code types to validate information in certain fields in employee data and various functions. You define one or more code values for each code type. When you use code values, you ensure that consistent information is entered into key fields in employee data for ease in reporting and viewing employee information. The system displays **+** next to each field in which you enter code values associated with a specified code type. See the *Infinium HR Guide to Controls* for details on how to define code values.

You use code values when you enter most personnel action transactions. Therefore, before you can enter personnel actions, you must first define code values through the *Update Employer Codes* option. The following table identifies the code types that you use in each transaction within the *Enter Personnel Actions* function.

Code Type	Personnel Action Transaction	Sample Code Values	Sample Code Value Description
RAT Performance Rating	Performance Review	EXCEL SATIS	Excellent Satisfactory
RTP Review Type	Performance Review	ANN PROB	Annual Review Probationary Review
SAL Salary Change Reason	Salary Change	MERIT PROMO	Merit Increase Promotional Increase
TRR Transfer Reason	Transfer	REORG EEREQ	Reorganization Employee Request
STS Status	Status Change Rehire	FULL PART	Full Time Part Time
LVC Leave Code	Status Change	MLOA PLOA	Medical Lv of Absence Personal Lv of Absence
RHC Rehire Reason	Rehire	01 02	Unique Skills Return to Area
TRM Termination Reason	Termination	V01 I01	Voluntary - Quit Involuntary - Fired

Code Type	Personnel Action Transaction	Sample Code Values	Sample Code Value Description
REC Rehire Eligibility	Termination	YES NO	Eligible for rehire Not eligible for rehire
GRV Work Action Code	Work Action	SVCAW GRIEV	Service Award Grievance
GTV Work Action Category	Work Action	5-YR STEP1	5-Year Service Award Step 1 Grievance
RES Resolution of Work Action	Work Action	DIS RES	Grievance Dismissed Grievance Resolved

Accessing Personnel Actions

You use the *Enter Personnel Actions* function to enter twelve different types of transactions, which are listed below:

- Performance Review
- Salary Change
- Promotion
- Transfer
- Status Change
- Blood Donation
- Hire
- Rehire
- Termination
- Work Action
- Personal Change
- Demotion

If you do not see all of these transactions when you display the prompt screen for the *Enter Personnel Actions* function, you may not have authority to enter some of the transactions. Your system administrator uses a security function to restrict each user to the types of transactions appropriate for him or her.

Each of the personnel action transactions is discussed in a separate section of this chapter. The information on how to access the *Enter Personnel Actions* function is detailed below for your reference. It will not be repeated in the discussion of each individual transaction.

Follow these steps to access the *Enter Personnel Actions* function:

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

2. Select *Update Employee Data.*

3. Select *Enter Personnel Actions* [EPA]. The system displays the screen shown in Figure 14-1.

```
 6/04/03  16:16:18        Personnel Actions Update        PEGMTR    PEDMTR

Employer . . . .  ___ +
Employee . . . .  _________ +   -or-  Last Name . . . .  __________________ +

Transaction . . .  _____

                       Opt  Tran       Description
                        _   RE    Performance Review
                        _   SC    Salary Change
                        _   PR    Promotion
                        _   TR    Transfer
                        _   ST    Status Change
                        _   BD    Blood Donation
                        _   HI    Hire
                        _   RH    Rehire
                        _   TE    Termination
                        _   WA    Work Action
                        _   PC    Personal Change
                        _   DM    Demotion


F3=Exit   F4=Prompt   F10=Access
```

Figure 14-1: Personnel Actions Update prompt screen

4 Use the following information to fill in the fields on this screen:

You specify the employer, employee and personnel action transaction(s) you want to record for the employee on this screen. You can select more than one transaction for an employee. However, if you want to record a change in position using the transfer, promotion, demotion or rehire transactions, and a salary change transaction for the same employee, first select and complete the position movement transaction. Then return to the prompt screen to select the salary change transaction.

You can type the two-character transaction code in the *Transaction* field or you can type any character in the *Opt* column next to the transaction(s) you need to record for the employee.

Employer

Type the code that represents the employee's employer. Press F4 to display a list of valid employers.

Employee

Type the number assigned to the employee within his or her current employer. 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 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.

Transaction

Use this field to specify a single personnel action transaction that you want to record for the specified employee. You can also use the *Opt* field in the lower part of the screen. If you want to record more than one transaction for the specified employee, you can use the *Opt* field to select all of the required transactions.

Valid values are:

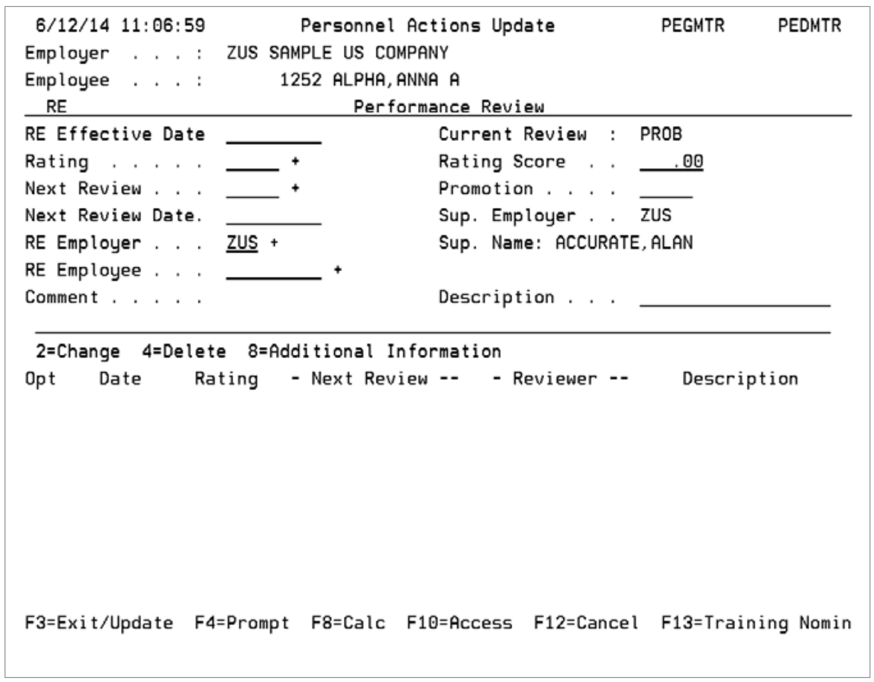
RE	Performance Review
SC	Salary Change
PR	Promotion
TR	Transfer
ST	Status Change

BD	Blood Donation
HI	Hire
RH	Rehire
TE	Termination
WA	Work Action
PC	Personal Change
DM	Demotion

Entering a Performance Review Transaction

You use the performance review transaction to record information about an employee’s performance appraisal including the date of the appraisal, the employee’s performance rating, the type of appraisal he or she receives next and the date the next performance review is scheduled.

1 From the Enter Personnel Actions prompt screen, select the **RE** transaction and press Enter. The system displays the screen shown in Figure 14-2.



```
 6/12/14 11:06:59        Personnel Actions Update         PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       1252 ALPHA,ANNA A
  RE                            Performance Review
RE Effective Date  _________            Current Review  :  PROB
Rating  . . . . .  _____ +              Rating Score  . .  ____.00
Next Review . . .  _____ +              Promotion . . . .  _____
Next Review Date.  _________            Sup. Employer . .  ZUS
RE Employer . . .  ZUS +                Sup. Name: ACCURATE,ALAN
RE Employee . . .  _________ +
Comment . . . . .                       Description . . .  ______________

 2=Change  4=Delete  8=Additional Information
Opt    Date     Rating   - Next Review --   - Reviewer --     Description

F3=Exit/Update  F4=Prompt  F8=Calc  F10=Access  F12=Cancel  F13=Training Nomin
```

Figure 14-2: Personnel Actions Update Performance Review screen

2 Use the following information to fill in the fields on this screen:

After you enter a performance review transaction, the system updates the *Next Review*, *Next Review Date* and *Promotion* fields in the employee’s basic data record.

The performance review transaction does not affect Infinium PY processing.

The *RE Effective Date, Rating, Next Review, Next Review Date, RE Employer* and *RE Employee* fields are required. Fields are generally discussed in cursor flow order except when fields are related to each other but do not appear together on the screen.

Displays and Reports

The system uses the *Next Review* and *Next Review Date* fields to generate the *List Next Review Schedule* report and the *Next Review Schedule Display* function.

RE Effective Date

Type the date of the employee's performance review or appraisal discussion. If you type a date that is the same as or earlier than the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data record with the performance review information as soon as you press Enter to save the new information in the sub-file of the screen. Then press F3 to exit from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's basic data record until you execute the *Mass Update Personnel Actions* function.

Current Review

This field displays the code that represents the type of performance review you are currently recording for the employee. The system retrieves this code from the *Next Review* field in the employee's basic data record. You update the *Next Review* field in an employee's basic data record each time you enter a performance review transaction for the employee. You cannot type in the *Current Review* field on the Performance Review screen.

Rating

Type the code value that indicates the employee's performance evaluation or appraisal rating. You define code values for this field using code type **RAT**.

Rating Score

Type the numeric performance appraisal rating or score received by the employee. This is a 5-character numeric field with two decimal places. The maximum value you can specify is 999.99. This is an optional field.

If you establish performance review controls, the system uses this field to automatically determine the date and type of next performance review for the employee. See the "Using Additional Personnel Action Functions" chapter for details on how to establish performance review controls.

Next Review

Type the code value that identifies the next type of appraisal or performance review the employee is scheduled to receive. You define code values for this field using code type **RTP**.

If you are typing a current transaction, the system updates the *Next Review* field in the employee's basic data record with this code value when you complete the performance review transaction. If you are typing a future-dated transaction, the *Mass Update Personnel Actions* function updates this field later.

Next Review Date

Type the date on which the employee is next scheduled to receive a performance review.

If you are typing a current transaction, the system updates the *Next Review Date* field in the employee's basic data record with this date when you complete the performance review transaction. If you are typing a future-dated transaction, the *Mass Update Personnel Actions* function updates this field later.

If you have established performance review controls, you can press F8 to have the system calculate and automatically enter information in the *Next Review* and *Next Review Date* fields. See the following chapter for details.

Sup. Employer

This field displays the code that represents the employee's supervisor's employer. The system retrieves this code from the *Sup. Employer* field in the employee's basic data record.

Promotion

You can use this field to indicate the employee's promotability rating. For example, you can type **NO** to indicate the employee is not promotable, or **IMMED** to indicate he or she is promotable now. This is a 5-character free-form field that does not require pre-defined values.

RE Employer

Type the code that represents the employer of the person who gave the employee his or her performance appraisal. The reviewer can be assigned to the same or a different employer than the employee he or she reviewed.

Sup. Name

This field displays the name of the employee's supervisor. The system retrieves this information from the *Sup. Name* field in the employee's basic data record.

RE Employee

Type the employee number of the person who gave the employee his or her performance review. Generally, this would be his or her supervisor. Press [F4 to display a list of employees within the employer specified in the *RE Employer* field.

Description

You can use this field to type any additional information about the performance review. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the performance review. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Performance Review screen. The system displays the new information in the sub-file at the bottom of the screen.

If you typed a future date in the *RE Effective Date* field, the system highlights the transaction and displays the following message:

***Unprocessed transaction - employee basic data will not be updated.**

The system will process this transaction and update the employee's basic data record with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the Mass Update that is the same as or after the effective date of the performance review transaction.

4 Press F3 to exit from this screen and store this transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

If the date you typed in the *RE Effective Date* field is the same as or earlier than the system date, the system automatically updates the *Next Review, Next Review Date* and *Promotion* fields in the employee's basic data record.

Entering a Salary Change Transaction

You use the salary change transaction to increase or decrease the employee's base rate of pay. The base pay rate is stored in the *Base Rate* field in basic data. If personnel users at your location are authorized to update payroll rates, you can also update the employee's payroll rates that are stored in the *Update Payroll Data* function on Infinium PY.

Displaying and Printing Salary Change Information

The system uses the salary change transactions you enter to build a history of salary information for the employee. You can use the *Display Salary Changes* function to view salary change history information for many employees or the *Display Employee History* function to review a single employee's salary change history.

There are many standard reports that include salary change history including *List PE Actions, List PE Action Details*, *List PE Actions by Levels* and *List PE Actions by Employee*. See the following parts entitled "Displaying Employee History" and "Printing Employee History" for details.

Coordination with Infinium PY

If Personnel users at your location are authorized to update payroll rates, you can also update the employee's payroll rates which are stored in the *Pay Rate, 2nd Pay Rate* and/or *3rd Pay Rate* fields in the payroll data record. The system typically uses the payroll rates to calculate the employee's pay during payroll cycle processing. You should coordinate with Infinium PY users at your site to ensure that you make payroll rate changes in advance of the appropriate pay cycle.

The system does not automatically prorate salary changes that occur in the middle of a pay period. For example, if you enter a salary change transaction that is effective 6/5/95 and update the payroll rates in advance of the pay period that includes 6/1/95 through 6/8/95, the system uses the new payroll rate to calculate all of the employee's earnings that pay period.

Payroll processors can use the *Retroactive Pay Processing* function to compute adjustments that are due when you input employee rate changes after their effective date. For example, if an employee receives a rate increase effective 2/1/95 but you do not enter it in Infinium HR until 6/1/95, you owe the employee a retroactive pay adjustment for the four months that he or she was paid at a lower rate.

Recording a Bonus

You can use the salary change transaction to make a permanent change to the employee’s base rate(s) or to record a bonus. When you record a bonus, Infinium HR does not update the employee’s basic data record nor are payroll rates updated. Bonus information is stored in the employee’s salary change history but is not used by Infinium PY to generate a bonus payment to the employee.

Step-in-Grade Employees

You generally do not type salary change transactions for employees whose pay you administer through the step-in-grade function on Infinium HR. When you use the *Mass Update Employee Steps* function to move the employee from his current step to his next step, the system updates the employee’s personnel and payroll rates and automatically creates a salary change history transaction for the employee.

If necessary, you can use the salary change transaction to make rate adjustments for step-in-grade employees. For example, when an employee transfers from one step-in-grade position to another step-in-grade position, you can use the salary change transaction to update his or her current step and rate.

Entering a Salary Change Transaction

1 From the Enter Personnel Actions prompt screen, select the **SC** transaction and press Enter. The system displays the screen shown in Figure 14-3.

```
 6/12/14 11:11:06        Personnel Actions Update          PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       1252 ALPHA,ANNA A
  SC                              Salary Change
SC Effective Date  ________               Position  . . . .  200930 +
SC Reason . . . .  _____ +                Job Code  . . . .  930   +
SC Base Rate  . .  ______________.0000 -or- Increase %  . . .  ____.0000
Updt Payroll Rate  1  (0->5)              Payroll Rate  . .  ______________.0000
Pay Grade . . . .  _____ +                Scheduled Pay Pds  50
                                          Regular Hours . .   37.50
Pay Type  . . . .  H                      Bonus?  . . . . .  0 (0=No 1=Yes)
SC Base Frequency  H                      Comp Ratio  . . :  124.9800
Pay Frequency . .  W                      Salary Quartile :  3
Prev. Frequency .  H                      Prev. Base Rate .  _________39.7500
Comment . . . . .                         Description . . .  __________________

 2=Change  4=Delete
Opt   Date     Reasn          Base Rate      Incr%         Incr. Amt.     Comp
 _  3/01/2002 ADJST H           39.7500      .0000             .0000    126.19
 _  3/01/2002 ADJST H           39.7500      .0000             .0000    126.19
 _  1/10/2000 STEP  H           39.7500      .6329             .2500    132.50
 _  1/10/2000 STEP  H           39.7500      .6329             .2500    132. +
F3=Exit/Update  F4=Prompt  F5=More Info  F8=Calculate  F10=Access  F12=Cancel
```

Figure 14-3: Personnel Actions Update Salary Change screen

2 Use the following information to fill in the fields on this screen:

The system uses the *Base Rate* field in basic data for Infinium HR functions such as Benefits Administration and Wage and Salary Administration. When you update the employee's base rate, the system also automatically updates the *Salary Quartile* and *Comp Ratio* fields in the employee's basic data record.

You must enter information in the following fields:

- *SC Effective Date*
- *SC Reason*
- *SC Base Rate*
- *Scheduled Pay Pds*
- *Regular Hours*
- *Pay Type*
- *Bonus*
- *SC Base Frequency*
- *Pay Frequency*
- *Prev. Frequency*

The system defaults information into the *Scheduled Pay Pds, Regular Hours, Pay Type, SC Base Frequency and Pay Frequency* fields on the salary change transaction screen. You do not need to type in these fields if the default information is correct. If the information is not correct, you can type over the default information with the new information.

The following fields default into the Salary Change screen from the employee's basic data record for informational purposes only. You do not use the salary change transaction to change these fields:

- *Position*
- *Job*
- *Prev. Base Rate*
- *Prev. Frequency*

If you enter more than one future-dated change before you use the *Mass Update PE Actions* function, you can manually enter the applicable value for the previous base rate on the second transaction. The system does not refresh the previous base rate value or recalculate the increase percentage when processing salary changes, to preserve any manual overrides that were entered.

Fields are generally discussed in cursor flow order except when they are related to each other but do not appear together on the screen.

SC Effective Date

Type the effective date of the employee's salary change. If you type a date that is the same as or earlier than the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data record with the salary change information as soon as you press Enter to store the transaction in the sub-file. Then press F3 to exit from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's basic data record until you execute the *Mass Update Personnel Actions* function.

Position

This field displays the employee's current position assignment. If it is not correct, use the transfer, promotion or demotion transactions to update it.

SC Reason

Type the code value that indicates why the employee received a salary change. You define code values for this field using code type **SAL**.

Job Code

This field displays the employee's current job assignment. If it is not correct, use the transfer, promotion or demotion transactions to update it.

SC Base Rate

Type the employee's new Personnel Base Rate. The system uses this field to update the *Base Rate* field in the employee's basic data record. You can leave this field blank and enter information into the *Increase %* field instead. The system uses information in the *Increase %* field to automatically calculate the employee's new base rate when you press Enter to store the transaction in the sub-file of the screen. You type in either the *SC Base Rate* field or the *Increase %* field.

Ensure that the new base rate you enter is consistent with the value displayed in the *SC Base Frequency* field below. For example, if the value in the *SC Base Frequency* field is **M**, this indicates the base rate is stated on a monthly basis; you must type the new base rate as a monthly amount or change the value in the *SC Base Frequency* field to agree with the way you enter the new base rate.

If the values in the *SC Base Rate* and *SC Base Frequency* fields are not consistent, the system cannot correctly compute the employee's annualized base rate for Infinium HR functions such as Benefits Administration. In addition, salary change transaction computations stored in the *Increase %*, *Inc. Amt.* and *Comp Ratio* fields will be wrong.

The system automatically computes the *Increase %*, *Inc. Amt*., *Comp Ratio* and the *Salary Quartile* fields when you press Enter to store the salary change transaction and display it in the sub-file at the bottom of the screen.

Increase %

Type the percentage increase or decrease of the employee's salary change. This is a 7-character numeric field with four decimal places. The maximum percentage you can specify is 999.9999. If you are typing a decrease percentage, type the number followed by the minus sign.

For example, if the employee's previous base rate is $1000 per month and he or she receives an 8% increase, you type **8** in the *Increase %* field. If the employee receives a 5% decrease in pay, type **5-** in the *Increase %* field.

The system automatically updates information in the *Base Rate*, *Inc. Amt*., *Comp Ratio* and the *Salary Quartile* fields when you press Enter to store the salary change transaction in the sub-file of the screen.

Updt Payroll Rate

Use this field to specify if the system should automatically update one of the employee's payroll rates when you exit from the salary change screen.

You cannot update payroll rates unless personnel users have been authorized to do so on the Infinium PY employer control record. The system checks the Infinium PY employer control record; you are allowed to update payroll rates if the value in the *PE Updt Pay Rates* field is **1**.

Valid values for this field are:

0	Do not update payroll rates.
1	Update the *Base Rate* field in the payroll data record.
2	Update the *2nd Payroll Rate* field in the payroll data record.
3	Update the *3rd Payroll Rate* field in the payroll data record.
4	Update all three payroll rates to the new rate. This means all three payroll rates will be the same.

If you need to update more than one payroll rate, you need to enter more than one salary change transaction. When you type **1** in this field, the system automatically updates the employee's *Base Rate* field in basic data and the *Base Rate* field in payroll data. When you type **2** in this field, the system updates only the *2nd Payroll Rate* field in payroll data. When you type **3** in this field, the system updates only the *3rd Payroll Rate* field in payroll data.

The table below summarizes the way the system uses the *Updt Payroll Rate* field to update pay rates.

Value in the *Updt Payroll Rate* field	Field Updated in Basic Data	Field(s) Updated in Payroll Data
1	*Base Rate*	*Pay Rate*
2		*2nd Pay Rate*
3		*3rd Pay Rate*
4	*Base Rate*	*Pay Rate* *2nd Pay* *3rd Pay*

Payroll Rate

Type the new rate that the system will use to calculate the employee’s pay during Infinium PY cycle processing. You should discuss the appropriate way to complete the *Payroll Rate* field with payroll users at your site. They may use each payroll rate differently for different employees or for different types of income calculations during cycle processing.

For example, you state payroll rates for non-exempt salaried employees and for hourly employees in different ways. For salaried non-exempt employees the payroll *Base* is stated on a monthly basis, and the *2nd Payroll Rate* for these employees is stated on an hourly basis since it is used for overtime calculations. For hourly employees, you use only the payroll *Base Rate* which is stated on an hourly basis.

The payroll rate(s) may not be the same as the rate in the *SC Base Rate* field. The system uses the *SC Base Rate* field only for Infinium HR functions, so personnel users are free to state the rate in a way that best supports their business needs. Payroll users make independent decisions on how to state the payroll rates so that they best fit the way incomes are calculated during cycle processing.

Using the *Calculate* Function F8

If you want the system to update the *Payroll Rate* field, you must press F8 to calculate the payroll rate. The system calculates an hourly payroll rate if the value in the employee’s *Pay Type* field is **H**, which indicates the employee is paid by the hour on payroll. If the value in the *Pay Type* field is **N** (indicating a non-exempt salaried employee) or **S** (indicating an exempt salaried employee), the system calculates the payroll rate based on the *Pay Frequency* field.

For example, you enter a salary change transaction for a non-exempt salaried employee whose personnel base rate is stated on a monthly basis and payroll base rate is stated on a weekly basis. The value in the employee’s *Pay Type* field is **N**, her *Pay Frequency* is **W** (indicating she is paid on a weekly basis), her new *SC Base Rate* is $1000 and her *SC Base Frequency* is **M** (indicating her personnel base rate is stated on a monthly basis).

When you press F8 the system annualizes the employee’s new *SC Base Rate* by multiplying $1000 x 12, and then divides the result by 52 to compute a weekly pay rate of $230.77 for the employee’s new payroll base rate.

If the *Pay Type* for the same employee is **H**, the system divides the employee’s annualized *SC Base Rate* of $12,000 by the value in the *Scheduled Pay Pds* of **52** and the value in the *Regular Hours* field of **40** to compute an hourly payroll rate of $5.7692.

The *Calculate* function does not work if you are not authorized to update payroll rates.

Pay Grade

If the employee for whom you are processing the salary change transaction is assigned to a step-in-grade job, the system displays his or her assigned pay grade. You cannot type a new pay grade in this field unless this pay grade is associated with the employee’s job control, which is represented by the value in the *Job Code* field on this screen.

Current Step

If the employee for whom you are processing the salary change transaction is assigned to a step-in-grade job, the system displays his or her current step within his or her assigned pay grade. The system does not display this field if the employee is not assigned to a step-in-grade job.

You can type a new step for the employee in this field, if the step is defined on the pay grade control record. If you type a new value in the *Current Step* field, you can type the new rate in the *SC Base Rate* and *Payroll Rate* fields. The rates you enter in the *SC Base Rate* and *Payroll Rate* fields must agree with the rate defined for the employee’s *Current Step* on the pay grade control record.

The system automatically fills in the *SC Base Rate* and *Payroll Rate* fields if you leave them blank and press Enter. When you press Enter, the system moves the salary change transaction to the sub-file. It also retrieves the rate defined for the *Current Step* from the pay grade control record and fills in the *SC Base Rate* and *Payroll Rate* fields accordingly.

Scheduled Pay Pds

The system displays the number of pay periods per year in which the employee is expected to be paid. The information in this field defaults from the *Scheduled Pay Pds* field in the employee’s basic data record. The system uses this field to annualize the employee’s base rate and to compute the employee’s *Payroll Rate* field, as described above.

You can use the salary change transaction to update this value or you can update the *Scheduled Pay Pds* field directly in the employee’s basic data record.

Regular Hours

The system displays the number of hours per pay period the employee is normally expected to work. The information in this field defaults from the *Regular Hours* field in the employee’s basic data record. The system uses this field to annualize the employee's Base Rate and to compute the employee's *Payroll Rate* field, as described above.

You can use the salary change transaction to update this value or you can update the *Regular Hours* field directly in the employee's basic data record.

Pay Type

The system displays the value that represents the employee's current pay type. The system uses this field to compute the employee's *Payroll Rate* field, as described above. This value defaults from the employee's assigned job control. Valid values are:

H	The employee is paid on an hourly basis in Infinium PY.
N	The employee is paid on a salaried basis in Infinium PY and is a non-exempt employee.
S	The employee is paid on a salaried basis in Infinium PY and is an exempt employee.

Bonus

Use this field to indicate that you are recording a bonus. When you type **1** in this field, the system does not update the employee's *Base Rate*, *Comp Ratio* or *Salary Quartile* fields in basic data nor does it update the payroll rate fields in payroll data. The system uses the salary change transaction for informational purposes only when you display or print the employee's salary history. Valid values are:

0	The salary change transaction is not a bonus.
1	The salary change transaction is a bonus.

SC Base Frequency

The system displays the value in this field that identifies how the system should interpret the amount in the employee's *SC Base Rate* field. You should ensure that this value is consistent with the amount in the employee's *SC Base Rate* field so that the system produces the correct information on reports and in system calculations. The system defaults a value into this field based on the value in the *Base Frequency* field in the employee's basic data record. You can type a new value in this field 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 Frequency

The system displays how often the employee is scheduled to be paid on Infinium PY. The system defaults a value into this field based on the value in the *Pay Frequency* field in the employee's basic data record. You can change this value if necessary. 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

Prev. Frequency

The system initially enters a default value in this field from the *Base Frequency* field in the employee's basic data record. The system uses this value to interpret the *Prev Base Rate* field and enters the same default value in the *SC Base Frequency* field.

In most cases, you should not change this value because it represents the current value in the employee basic data record from a previous Salary Change, Hire or Rehire transaction.

Valid values are:

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

Prev. Base Rate

The system initially enters a default value in this field based on the amount in the *Base Rate* field in the employee's basic data record. The system uses this rate to calculate the *Increase %* and *Incr. Amt.* fields for the current Salary Change transaction you are entering.

In most cases, you should not change this amount because it represents the current value in the employee basic data record.

However, if you enter two future-dated salary changes before using the *Mass Update PE Actions* function, you can manually enter the applicable value for the previous base rate on the second transaction. The system does not refresh the previous base rate value or recalculate the increase percentage when processing salary changes, to preserve any manual overrides that were entered.

Comp Ratio

When you first display the Salary Change screen, this field shows the employee's current comp ratio which defaults from the *Comp Ratio* field in the employee's basic data record. The system calculates the comp ratio by dividing the employee's base rate into 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%.

After you type a salary change transaction and press Enter to store the transaction in the sub-file, the system automatically recalculates this field using the new *SC Base Rate*.

Salary Quartile

When you first display the Salary Change screen, the system displays the quartile of the employee's salary range where his or her current base rate fits. This information defaults from the *Salary Quartile* field in the employee's basic data record.

The system determines the quartile by comparing the employee's base rate to his or her assigned salary range. Each salary range is divided into four quarters. See the “Updating Employee Data” chapter for a complete explanation of how the system determines the employee's salary quartile.

After you type a salary change transaction and press Enter to store the transaction in the sub-file, the system uses the new *SC Base Rate* to automatically recalculate the information in this field.

Description

You can use this field to type any additional information about the salary change transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the salary change transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Salary Change screen. You can press F5 to display position and job information for each salary change in the sub-file. Press F5 again to return the display to its original appearance.

If you typed a future date in the *SC Effective Date* field, the system highlights the transaction and displays the following message:

***Unprocessed transaction - employee basic data will not be updated.**

The system will process this transaction and update the employee's basic data and payroll data records with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the Mass Update that is the same as or after the effective date of the salary change transaction.

4 Press F3 to exit from this screen and store this salary change transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

If the date you typed in the *SC Effective Date* field is the same as or earlier than the system date, the system automatically updates the following fields in the employee's basic data record:

- *Base Rate*
- *Base Frequency*
- *Regular Hours*
- *Scheduled Pay Pds*
- *Pay Type*
- *Pay Frequency*
- *Step*
- *Last Increase*
- *Last Increase %*
- *Last Increase Amt*
- *Increase Reason*
- *Next Increase*
- *Previous Rate*
- *Salary Quartile*
- *Comp Ratio*

If you have authority to update payroll rates and entered a new amount in the *Payroll Rate* field, the system also updates the specified *Payroll Rate* field in the employee's payroll data record.

Entering a Promotion Transaction

You use the promotion transaction to move the employee from one position to another position of higher rank or greater status within the same employer. The system updates the employee’s basic data record with new position, job and level information, along with other related information that defaults from the new job control or position control records.

The system keeps the employee’s previous position assignment in his or her on-line history for use in employee history displays and reports.

1 From the Enter Personnel Actions prompt screen, select the **PR** transaction and press Enter. The system displays the screen shown in Figure 14-4.

```
 6/12/14 11:17:04        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
Position  . . . :  101160    ACCTS PAYABLE SUPERVISOR
  PR                            Promotion
PR Effective Date  ________            Job Code  . . . :
PR Position . . .  ______ +            Scheduled Pay Pds  52
Shift Code  . . .  1____ +             Regular Hours . .   40.00
Area        . . :                      Labor Category  :
Division    . . :                      Worker s Comp . :
Department  . . :                      Location  . . . :
Cost Centr  . . :                      Union . . . . . :
Sup. Employer . :  ZUS +               Sup. Name: ACCURATE,ALAN D            +
Comment . . . . .                      Description . . .  _________________

 2=Change  4=Delete
Opt  Date      Lvl  Positn  Job   Loctn  Labor  Union  -------  Levels  ------
 _  7/01/2013  00   100140 140    HQ                   200   ADMIN ACCT  103




F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-4: Personnel Actions Update Promotion screen

2 Use the following information to fill in the fields on this screen:

You can update many fields in the employee’s basic data record when you type a promotion transaction. See the table beginning on page 14-5 for a comprehensive list of the affected fields.

The most significant fields that you update are the *Level* fields, along with the *Position, Position Title* and *Job Code* fields. The fields that the system updates vary from one promotion transaction to another, depending on the differences in the employee's old and new position controls. See the *Infinium HR Guide to Controls* for details on how to establish these control records.

For example, if you promote the employee from a Secretary position in the Accounting Department to an Executive Secretary position in the Sales Department, you affect many fields that default from the employee's new position assignment including one or more of the *Level* fields, along with the *Position* field, the *Position Title* field and fields that typically default from the job control such as the *EEO Code, EEO-4 Function, Security Group* and *Seniority Date*.

Updating Payroll Data

When you enter a promotion transaction, you can affect payroll processing if the new position contains level, job or payroll authorization group values that differ from the employee's previous position.

The system can use the level and job values during payroll cycle processing to generate labor expense account numbers; later, the system can use these fields to generate general ledger numbers for employer liabilities and employee deductions.

When you enter a promotion transaction, the system also updates the annual wage base in the payroll master file, PYPMS, if you change an hourly employee's regular hours. Changing the value in the *Scheduled Pay Periods* field on the Personnel Actions Update screen does not affect the annual wage base.

Reviewing the Audit Report

If Infinium HR users are authorized to update the value in the *PY Auth Group* field in the employee's payroll data record, the system also automatically updates employee income and deduction authorizations. Infinium HR and Infinium PY users should carefully review the audit report of the changes the system makes to employee income and deduction authorizations when the payroll authorization group value changes. The system generates the report using interactive processing and assigns printer file name **PYTMBGAU**. You can access this report from the Work with All Spooled Files screen.

You must type information in the *PR Effective Date* and *PR Position* fields.

Displaying and Printing Promotion Information

The promotion, demotion, transfer and rehire transactions create a history of the positions held by employees in your organization. You can use the *Display Employee History* function to review an employee's promotion transactions.

You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels, List PE Actions by Employee* and *List Transfer/Promotion/Demotion* reports to print promotion transaction information.

Sequence for Entering Promotion Information

When an employee receives a promotion and a corresponding salary change, you should type the promotion transaction first. If the employee's salary range changes as a result of the position change, the system uses the new salary range in the salary change transaction to compute the employee's *Salary Quartile* and *Comp Ratio* fields.

In addition, the system stores the new salary range with the employee's promotional salary change transaction which provides more accurate information for historical purposes.

If an employee is transferred to another employer and within that employer is being promoted to a different position, you must type the transfer transaction first to move the employee to the new employer. After you transfer the employee, you can enter the promotion transaction in the new employer.

PR Effective Date

Type the effective date of the employee's promotion. If you type a date that is the same as or earlier than the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data record with the promotion transaction information as soon as you press Enter to store the new information in the sub-file of the screen. Then press F3 from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's basic data record until you execute the *Mass Update Personnel Actions* function.

PR Position

Type the code that identifies the new position to which the employee is being promoted. Press F4 to display a list of positions within the employee's current employer. The display uses position control records to indicate each position's authorized headcount, current staffing levels and openings. You can type any character in the *Opt* field next to the employee's new position and press Enter to automatically fill the *PR Position* field.

When you select a position from the F4 display, the system automatically updates the *Job code, Shift Code, Level, Labor Category, Worker's Comp, Location* and *Union* fields on the Promotion screen with information from the new position control record. If you type the new position code into the *PR Position* field, the system does not update the fields listed in the preceding sentence until you press Enter to store the transaction in the sub-file of the screen.

Scheduled Pay Pds

The system defaults information into this field based on the *Scheduled Pay Pds* field in the employee's basic data record. This field indicates the number of pay periods per year in which the employee is expected to be paid. You can update this information if necessary.

Regular Hours

The system defaults information into this field based on the *Regular Hours* field in the employee's basic data record. This field indicates the number of hours per pay period that the employee is expected to work. You can update this information if necessary.

Shift Code

A code value defaults into this field based on the *Shift* field in the employee's basic data record. The system uses the Shift code to compute shift or other premiums during payroll cycle processing. You can update this code value if necessary. You define code values for this field using code type **SFT**.

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.

Description

You can use this field to type any additional information about the promotion transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the promotion transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Promotion screen. The system updates the protected fields on this screen including the *Levels, Labor Category, Worker's Comp, Location* and *Union* fields, depending on the information in the employee's new position control record. The system then performs one or more of the following actions:

- If you entered a future date in the *PR Effective Date* field, the system highlights the transaction and displays the following message:

  ***Unprocessed transaction - employee basic data will not be updated.**

  The system processes this transaction and updates the employee's basic data and personnel data records with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the Mass Update that is the same as or after the effective date of the promotion transaction.

- If you selected a promotion position that has no openings, the system displays the following error message in a confirmation window:

  WARNING: Authorized workforce level exceeded. This entry will cause the authorized workforce level to be exceeded for this position (as of the date specified). You may override this error. Press ENTER to accept the error or CANCEL to return.

  Perform one of the following actions to remove the warning message:

  - Press Enter to move the employee to the new position, even though by doing so you exceed the authorized headcount for this position.
  - Press F12 to return to the Promotion screen so that you can select a different position.
  - If you select a Promotion position that has been defined as a single position, the system displays the following error message in a confirmation window:

    WARNING: Position has already been assigned. The position to which you wish to hire, transfer, or promote an employee already has an employee assigned to it. If you wish to replace this EE number with that of the employee you are entering, you may do so by overriding this error. Press ENTER to accept the error or CANCEL to return.

Perform one of the following actions to remove the warning message:

- Press Enter to move the employee to the new position, even though by doing so you cause two employees to be assigned to a position that has been defined as a single position on the position control record.
- Press F12 to return to the Promotion screen so that you can select a different position.

4 Press F3 to exit from this screen and store this promotion transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen. The system performs the following actions:

- If the date you typed in the *PR Effective Date* field is the same as or earlier than the system date, the system automatically updates the *Position* and *Position Title* fields in the employee's basic data record.
- Depending on the differences between the employee's old and new positions, the system also updates the *Job Code 1, Seniority Date, EEO Category, EEO-4 Function, Union, Training Group, Security Group, Worker's Comp., Labor Category, Pay Grade, Salary Range, Salary Quartile and Comp Ratio* fields in the employee's basic data record.
- The system updates the *Seniority Date* field only if the employee's new position is associated with a different Job Code than his or her previous position. The system uses the first *Seniority Date* field in the employee's basic data record to indicate the employee's most recent job change date.
- The system updates fields in the Previous Information section of screen 3 in the employee's personnel data record. If as a result of the promotion transaction the employee is assigned to a new job code, the system uses the *PR Effective Date* field to update the *Job Change Date* field in Personnel Data. The *Job Code* and *Position* fields in personnel data display the codes associated with the employee's prior job and position assignments.
- If as a result of the promotion transaction the employee is assigned to one or more new levels, the system uses the *PR Effective Date* field to update the *Level Change Date* field in personnel data. The level codes associated with the employee's prior position assignment are displayed below the *Level Change Date* field.
- If as a result of the promotion transaction the employee should be assigned to a new payroll authorization group and Infinium HR users are allowed to update this information, the system automatically updates the value in the *PY Auth Group* field in the employee payroll data record.

  It also updates the employee's income and deduction authorizations and generates the Payroll Authorization Group Changes to Income and Deductions audit report. Access the Work with All Spooled Files screen and locate printer file **PYTMBGAU** to review or print this report.

Entering or Updating Payroll Locality Information for Promotion Transactions

When you are processing a promotion transaction, you can enter or update state, locality and home tax company information. Follow the steps below to enter this information.

1. On the Personnel Actions Update Promotion screen, press F6. The system displays the Personnel Trans. More Info Window shown in Figure 14-5.

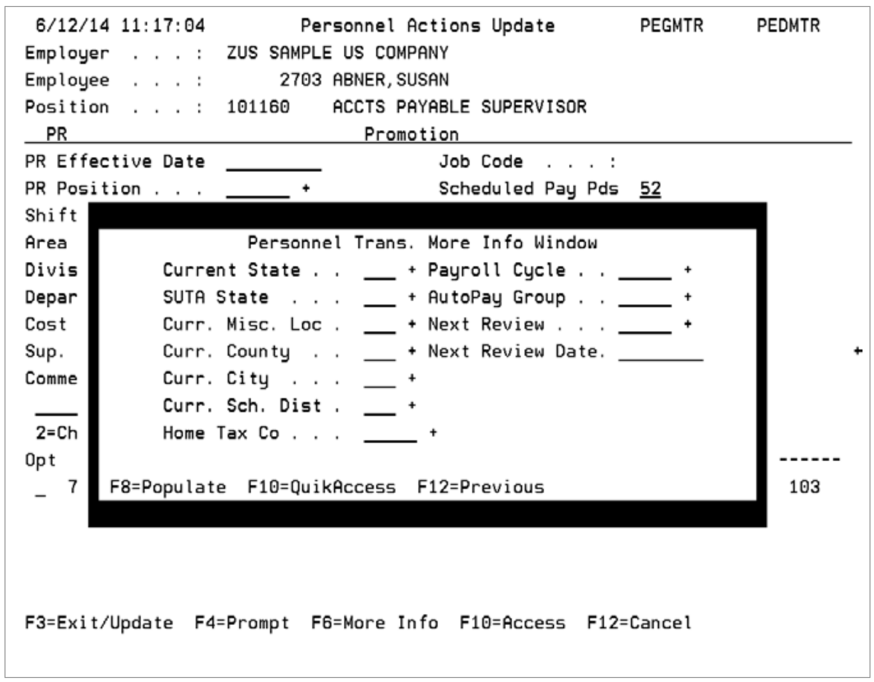


Figure 14-5: Personnel Trans. More Info Window

2. Use the information below to complete the fields in the Personnel Trans. More Info Window or press F8 to activate a custom program to enter values in the fields.

Current State

Specify the state code value where the employee is currently assigned and is being paid. This state is the default state for all earnings generated by the system.

SUTA State

Specify the SUTA state for the employee. This field is for informational purposes only.

Curr. Misc. Loc

Specify the current taxing locality in which the employee is being paid. This value is the default for generated time entry records. This value is associated with employer code type LCN and locality type 4, miscellaneous.

Curr. County

Type the current county in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 1, county.

Curr. City

Specify the current city in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 2, city.

Curr. Sch. Dist

Specify the current school district locality in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 3, school district.

Home Tax Co

For multi-tax processing only, to associate this employee with a federal tax company that is different from the tax company specified on the payroll master record, specify the tax company code value here. Leave blank if the employee is hired under the default tax company.

Payroll Cycle

Specify the payroll cycle to be used to pay the employee. This payroll cycle code is used to update the *Payroll Cycle* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify a *Payroll Cycle* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee's payroll data record.

AutoPay Group

Specify the autopay group to use to generate income records for the employee in payroll. This autopay group code is used to update the *AutoPay Group* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify an *AutoPay Group* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee’s payroll data record.

Next Review

Specify the code value that identifies the next type of appraisal or performance review the employee is scheduled to receive. Use code type RTP in *Update Employer Codes* to define code values for this field.

If you are typing a current transaction, the system updates the *Next Review* field in the employee's basic data record with this code value when you complete the Performance Review transaction. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

Next Review Date

Specify the date on which the employee is next scheduled to receive a performance review.

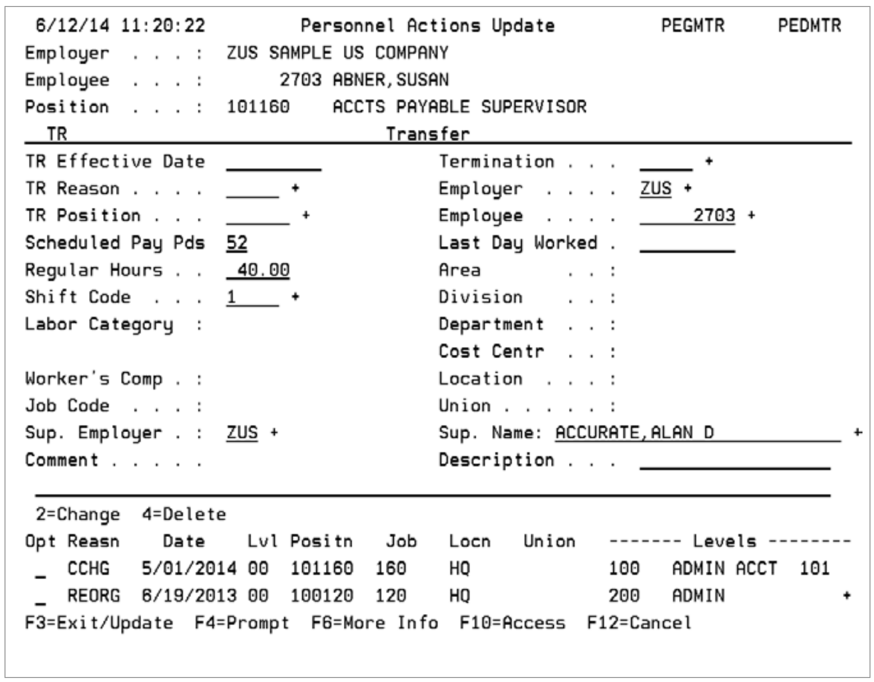
If you are typing a current transaction, the system updates the *Next Review Date* field in the employee's basic data record with this date. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

3. Press Enter to exit to the Personnel Trans. More Info Window and save your information.
4. Press Enter to exit to the Personnel Action Update screen and save your information.
5. Enter another PE action or press F3 to exit to the HR main menu.
6. Press Enter to exit to the Personnel Actions Update screen and save your information.
7. Press F3 to exit to the main menu.

Entering a Transfer Transaction

You can use the transfer transaction to move employees from one position to another of similar rank within the same employer, or to move an employee from one employer to another employer. Use the following information to enter a transfer transaction.

1 From the *Enter Personnel Actions* prompt screen, select the **TR** transaction and press Enter. The system displays the screen shown in Figure 14-6.



```
 6/12/14 11:20:22        Personnel Actions Update         PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
Position  . . . :  101160    ACCTS PAYABLE SUPERVISOR
  TR                               Transfer
TR Effective Date  _________           Termination . . .  _____ +
TR Reason . . . .  _____ +             Employer  . . . .  ZUS +
TR Position . . .  ______ +            Employee  . . . .  ____2703 +
Scheduled Pay Pds  52                  Last Day Worked .  _________
Regular Hours . .  _40.00              Area        . . :
Shift Code  . . .  1____ +             Division    . . :
Labor Category  :                      Department  . . :
                                       Cost Centr  . . :
Worker's Comp . :                      Location  . . . :
Job Code  . . . :                      Union . . . . . :
Sup. Employer . :  ZUS +               Sup. Name: ACCURATE,ALAN D            +
Comment . . . . .                      Description . . .  __________________

 2=Change  4=Delete
Opt Reasn     Date    Lvl Positn   Job    Locn   Union    ------- Levels --------
 _  CCHG   5/01/2014 00  101160  160    HQ              100   ADMIN ACCT   101
 _  REORG  6/19/2013 00  100120  120    HQ              200   ADMIN            +
F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-6: Personnel Actions Update Transfer screen

2 Use the following information to fill in the fields on this screen:

You can perform two types of transfer transactions:

- Intra-company transfer: Use to move the employee from one position to another within the same employer.
- Inter-company transfer: Use to move the employee from a position in one employer to a position in another employer.

You must type information in the *TR Effective Date, TR Reason* and *TR Position* fields.

Fields are discussed in cursor flow order. You must enter information into the fields in cursor flow order when you input an inter-company transfer.

Displaying and Printing Transfer Information

The promotion, demotion and transfer transactions create a history of the positions held by employees in your organization. You can use the *Display Employee History* function to review an employee's transfer transactions, whether they are within or between employers.

You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels, List PE Actions by Employee* and *List Transfer/Promotion/Demotion* reports to print transfer transaction information.

Intra-Company Transfer

When you move an employee from one position to another within the same employer, you can update many fields in the employee's basic data record. See the table in the 'Fields Affected by Personnel Actions section beginning on page 14-5 for a comprehensive list of the affected fields.

The most significant fields that you update are the *Level, Position, Position Title* and *Job Code* fields. The fields that the system updates vary from one transfer transaction to another, depending on the differences between the employee's old and new position controls. See the *Infinium HR Guide to Controls* for details on how to establish these control records.

For example, if you move the employee from a Secretary position in the Accounting Department to a Secretary position in the Sales Department, the only fields that change may be one or more of the *Level* fields, along with the *Position* and *Position Title* fields. If both positions are associated with the same job code, the system makes no changes to fields in basic data that typically default from the job control such as the *EEO Code, EEO-4 Function, Security Group* and *Seniority Date*.

Updating Payroll Data

When you enter an intra-company transfer transaction, you can affect payroll processing if the new position contains level, job or payroll authorization group values that differ from the employee's previous position.

The system can use the level and job values during payroll cycle processing to generate labor expense account numbers; later, the system can use these fields to generate general ledger accounts for employer liabilities and employee deductions.

When you enter an intra-company transfer transaction, the system also updates the annual wage base in the payroll master file, PYPMS, if you change an hourly employee's regular hours. Changing the value in the *Scheduled Pay Periods* field on the Personnel Actions Update screen does not affect the annual wage base.

Reviewing the Audit Report

If Personnel users are authorized to update the value in the *PY Auth Group* field in the employee's payroll data record, the system also automatically updates employee income and deduction authorizations. Infinium HR and Infinium PY users should carefully review the audit report of the changes the system makes to employee income and deduction authorizations when the payroll authorization group value changes. The system generates the report using interactive processing and assigns printer file name **PYTMBGAU**. You can access this report from the Work with All Spooled Files screen.

Inter-Company Transfer

When you transfer an employee from one employer to another, the system terminates the employee from the old employer and creates new basic data and personnel data records for the employee in the new employer. You can specify the last day the employee worked for the old employer.

After you press F3 to exit from the transfer transaction screen, the system automatically displays the employee's basic data and personnel data records in the new employer. You must update code values in code-validated fields to be consistent with values defined for the new company.

For example, if you define code values for code type status (**STS**) differently in the new employer than in the old employer, the system will generate an error message when you press Enter on the second screen of basic data that contains the *Status* field. You must replace the employee's status code value from the old employer with a status code value that is valid in the new employer.

The system stores the employee's history up to and including the inter-company transfer transaction in the old employer. Then the system begins the employee's history in the new employer with any subsequent personnel action transactions that you enter for the employee in the new employer.

The system displays the employee's original date of hire in his or her basic data record in the new employer. The *Seniority Date* field in the basic data record indicates the job change date for the employee, which is the same as his or her inter-company transfer date.

The system retains all of the employee's records, including payroll year-to-date balances, in his or her old employer. Infinium PY begins tax withholding in the new employer without regard to limits met or amounts previously paid by the employee or the former employer. The system produces separate W-2 or T4 forms for the employee at year-end, one for each employer in which the employee worked during the calendar year.

Use the *Transfer User Def* field in the *Update Employer Controls* function to copy user-defined data for employees transferred from one company to another when you perform an intercompany transfer.

Use the *Transfer Payroll* field in the *Update Employer Controls* function to copy payroll data for employees transferred from one company to another when you perform an intercompany transfer. Payroll data includes the payroll master data, income data, and deduction data. The employee is initially authorized to the incomes and deductions from the PY authorization group.

Updating Additional Information for Inter-Company Transferees

In addition to basic data and personnel data, the system transfers some other personnel information to the new employer, including education data, on-the-job training data, property data, dependents data and eligibility data.

The system does not transfer the following Personnel information to the new employer; therefore, if it is needed, you must re-enter the information for the employee in the new employer:

- Automobile Data
- Log Data
- User-Defined Data
- Foreign National Data

If you type **1** or **2** in the *Auto Cancel?* field on benefit plan control records in the old employer, the system automatically cancels the employee's benefit enrollments in the old employer when you transfer the employee to a new employer. If you do not use the auto cancel feature, you must manually cancel the employee's benefit enrollments in the old employer. In either case, you must manually enroll the employee in benefit plans in the new employer.

After you transfer the employee to a new employer, you must enter the following payroll information for the employee in the new employer:

- Payroll data, including cycle and auto pay group assignments
- Income authorizations
- Deduction authorizations

Updating Miscellaneous Information for All Transferees

Whether you transfer an employee within or between employers, you may need to update additional information for the transferee. For example, if the employee relocates as a result of his position transfer, you may need to update his or her home address, benefits enrollments, payroll cycle assignment, tax deduction information and so on.

Sequence for Entering Transfer Information

When an employee receives a transfer and a corresponding salary change, you should type the transfer transaction first. If the employee's salary range changes as a result of the position change, the system uses the new salary range in the salary change transaction to compute the employee's *Salary Quartile* and *Comp Ratio* fields.

In addition, the system stores the new salary range with the employee's promotional salary change transaction which provides more accurate information for historical purposes.

If an employee is transferred to another employer and within that employer is promoted to a different position and receives a salary increase, you must enter the Transfer transaction first to move the employee to the new employer. After you transfer the employee, you should enter the Promotion transaction in the new employer, and then the salary change transaction.

Security Considerations

In order to transfer an employee between employers, you must have access to both the old and new employers. If you do not have access to both the old and new employers, you can use the termination transaction to terminate the employee from the old employer, and then use the *Enter New Hire* function to establish the employee in the new employer.

TR Effective Date

Type the effective date of the employee’s transfer. If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee’s basic data record until you execute the *Mass Update Personnel Actions* function.

Termination

You use this field only for inter-company transfers. The system terminates the employee from his or her current employer and creates basic data and personnel data records for the employee in the employer you specify in the *Employer* field below.

Type the code value that represents the reason the employee is terminating from his or her current employer. Press F4 to display a list of valid code values in the current employer. You use code type **TRM** to define code values for this field.

Leave this field blank if you are typing an intra-company (within existing employer) transfer.

TR Reason

Type the code value that represents the reason the employee is transferring positions within or between employers. Press F4 to display a list of valid values. You use code type **TRR** to define code values for this field.

Employer

The system displays the code that represents the employee’s current employer in this field. If you are typing an inter-company transfer, type the code that identifies the new employer to which the employee is transferring. Press F4 to display a list of valid employer codes.

Last Day Worked

For an inter-company transfer, type the date this employee last worked for the original employer.

When you exit this screen after performing an inter-company transfer, the system uses the date in this field to update the *Last Day Worked* field on the employee's basic data record.

TR Position

Type the code that identifies the employee's new position in his current or new employer. When you press F4 to display a list of valid position codes, the system displays positions defined for the employer specified in the *Employer* field.

The system displays information from the position control records that shows each position's authorized headcount, current staffing levels and openings. You can type any character in the *Opt* field next to the employee's new position and press Enter to automatically fill in the *PR Position* field on this screen.

When you select a position from the F4 display, the system automatically updates the *Levels, Shift Code, Labor Category, Worker's Comp, Location*, *Job Code* and *Union* fields on the Transfer screen with information from the new position control record.

Employee

The system displays the employee's number within his or her current employer in this field. If you are typing an inter-company transfer, you can assign this number to the employee in his or her new employer, or you can type a new number. It is preferable to assign the employee the same number in all employers to facilitate historical reporting and displays of employee information across all employers.

You cannot assign the employee to a number that has already been given to a different employee in the new employer. For example, the employee's number in the ABC company is 100 and you transfer him to the DEF company. If another employee in the DEF company has already been assigned employee number 100, the system produces the following error message when you press Enter on this screen:

Employee already exists with different TAX ID number.

You must type a new number for the employee in the *Employee* field before the system can process the inter-company transfer.

Scheduled Pay Pds

The system defaults information into this field based on the *Scheduled Pay Pds* field in the employee's basic data record. This field indicates the number of pay periods per year in which the employee is expected to be paid. You can update this information if necessary.

Regular Hours

The system defaults information into this field based on the *Regular Hours* field in the employee's basic data record. The value in this field indicates the number of hours per pay period that the employee is expected to work. You can update this information if necessary.

Shift Code

The system defaults information into this field based on the *Shift* field in the employee's basic data record. The system uses the Shift code to compute shift or other premiums during payroll cycle processing. You can update this code value if necessary. You define code values for this field using code type **SFT**.

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.

Description

You can use this field to type any additional information about the transfer transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the transfer transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Transfer screen. The system updates the protected fields on this screen including the *Levels, Labor Category, Worker's Comp, Location Job Code* and *Union* fields, depending on the information you entered on the employee's new position control record.

The system performs one or more of the following actions:

- If you type a future date in the *TR Effective Date* field, the system highlights the transaction and displays the following message:

  ***Unprocessed transaction - employee basic data will not be updated.**

The system processes this transaction and updates the employee's basic data and personnel data records with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the mass update that is the same as or after the effective date of the transfer transaction.

- If you select a transfer position that has no openings, the system displays the following warning message in a confirmation window:

  WARNING: Authorized workforce level exceeded. This entry will cause the authorized workforce level to be exceeded for this position (as of the date specified). You may override this error. Press ENTER to accept the error or CANCEL to return.

  Perform one of the following actions to remove the warning box from the screen:

  - Press Enter to move the employee to the new position, even though by doing so you exceed the authorized headcount for this position.
  - Press F12 to return to the Transfer screen so that you can select a different position.

- If you selected a transfer position that has been defined as a single position, the system generates the following warning message in a confirmation window:

  WARNING: Position has already been assigned. The position to which you wish to hire, transfer, or promote an employee already has an employee assigned to it. If you wish to replace this EE number with that of the employee you are entering, you may do so by overriding this error. Press ENTER to accept the error or CANCEL to return.

  Perform one of the following actions to remove the warning box from the screen:

  - Press Enter to move the employee to the new position, even though by doing so you cause two employees to be assigned to a position that has been defined as a single incumbent position on the position control record.
  - Press F12 to return to the Transfer screen so that you can select a different position.

4 Press F3 to exit from this screen and store this transfer transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

The following sections describe the way the system updates employee information for each type of transfer:

Updating Employee Information: Intra-Company Transfer

- If you entered an intra-company transfer and the date you typed in the *TR Effective Date* field is the same as or earlier than the system date, the system automatically updates the *Position* and *Position Title* fields in the employee's basic data record in his or her current employer.
- Depending on the differences between the employee's old and new positions, the system also updates the *Job Code 1, Seniority Date, EEO Category, EEO-4 Function, Union, Training Group, Security Group, Worker's Comp., Labor Category, Pay Grade, Salary Range, Salary Quartile and Comp Ratio* fields in the employee's basic data record.
- The system updates the *Seniority Date* field only if the employee's new position is associated with a different job code than his or her previous position. The system uses the first *Seniority Date* field in the employee's basic data record to indicate the employee's most recent job change date.
- The system updates fields in the Previous Information section of screen 3 in the employee's personnel data record. If as a result of the transfer transaction the employee is assigned to a new job code, the system uses the *PR Effective Date* field to update the *Job Change Date* field in personnel data. The *Job Code* and *Position* fields in personnel data display the codes associated with the employee's prior job and position assignments.
- If as a result of the transfer transaction the employee is assigned to one or more new levels, the system uses the *PR Effective Date* field to update the *Level Change Date* field in personnel data. The level codes associated with the employee's prior position assignment are displayed below the *Level Change Date* field.
- If as a result of the transfer transaction the employee should be assigned to a new payroll authorization group and Infinium HR users are allowed to update this information, the system automatically updates the value in the *PY Auth Group* field in the employee payroll data record.
- It also updates the employee's income and deduction authorizations and generates the Payroll Authorization Group Changes to Income and Deductions audit report. Access the Work with All Spooled Files screen and locate printer file **PYTMBGAU** to review or print this report.

Updating Employee Information: Inter-Company Transfer

If you entered an inter-company transfer and the date you typed in the *TR Effective Date* field is the same as or earlier than the system date, the system performs the following actions:

- Cancels benefit enrollments in the old employer

  When you press F3 to exit from the Transfer screen, the system generates the following message:

  Creating XX cancellation transactions for EE benefit enrollments...

  The system generates cancellation transactions for those benefit plans in which the employee was enrolled and for which the *Auto Cancel?* field on the benefit plan control record is **1** or **2**.

- Creates a basic data record in the new employer

  The system then automatically displays the first screen of the employee's basic data record in the new employer. If you entered **2** in the *Check for Dup ID?* field on the new company's employer control record, the system checks all employers on your database to determine if any other employees have the same tax identification number as the transferee.

  In the case of inter-company transfers, the system finds the transferee in the old and new employers and generates the following warning message at the bottom of the first screen of basic data:

  Tax ID # xxxxxxxxx assigned to EE # xxxxxxxxx in Employer XXX, [F21] = Override

  You must override this warning message to proceed to the second screen of the employee's basic data record.

  You must press Enter on each of the five basic data screens and update the information in code-validated fields that is not valid in the new employer.

  For example, if you define code values for code type **STS** (Status) differently in the new employer than in the old employer, the system will generate an error message when you press Enter on the second screen of basic data that contains the *Status* field. You must replace the employee's *Status* field code value from the old employer with a status code value that is valid in the new employer.

  You can update other information in basic data as necessary. You should use the *Enter Personnel Actions* function to update fields that should be maintained in the employee's history within the new employer.

- Creates a personnel data record in the new employer

  After you review the basic data record, the system automatically displays the personnel data record. You must update any code-validated fields that are not correct for the new employer.

The system automatically updates the following fields in the Previous Information section of the third screen of the employee's personnel data record in the new employer when you type an inter-company transfer:

Field Name	The System Displays . . .
Job Change Date	the employee's transfer effective date
Job Code	the employee's previous job code in his or her prior employer
Position	the employee's previous position code in his or her prior employer
Level Change Date	the employee's transfer effective date
Levels 1, 2, 3, 4	the employee's previous level codes in his or her prior employer
Employer	the code that represents the employee's prior employer
Employee	the employee's number while he or she was assigned to the prior employer, if different from his or her current employee number

- Terminates the employee from his or her old employer

  The system fills the *Termination*, *Termination Date* and *Last Day Worked* fields in the employee's basic data record in the prior employer. When you press F4 on the *Employee* field within the prior employer, the employee's name is lowlighted.

Entering or Updating Payroll Locality Information for Transfer Transactions

When you are processing a transfer transaction, you can enter or update state, locality and home tax company information. Follow the steps below to enter this information.

1 On the Personnel Actions Update Transfer screen, press F6. The system displays the Personnel Trans. More Info Window shown in Figure 14-7.

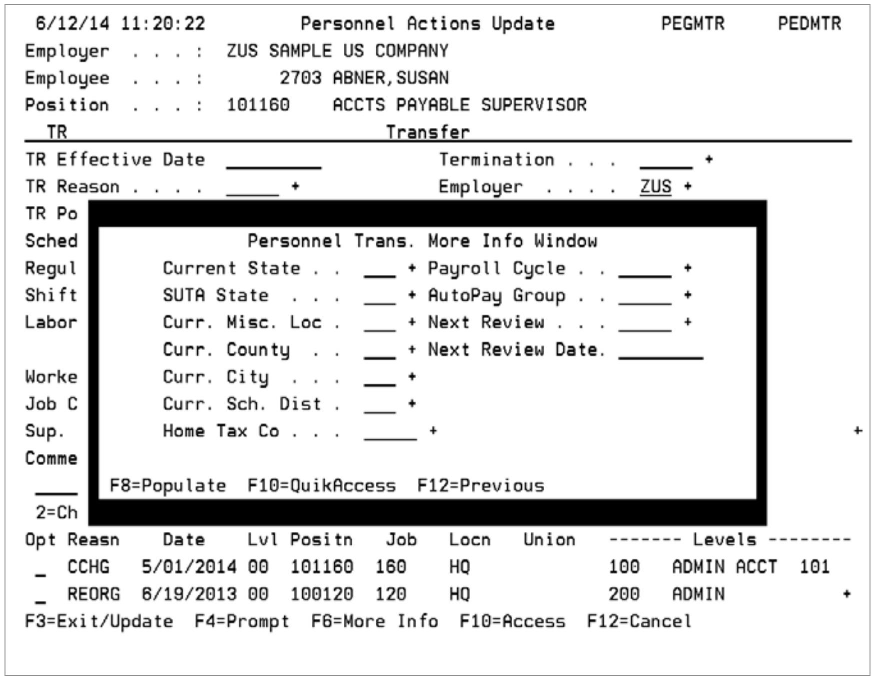


Figure 14-7: Personnel Trans. More Info Window

2 Use the information below to complete the fields in the Personnel Trans. More Info Window or press F8 to activate a custom program to enter values in the fields.

Current State

Specify the state code value where the employee is currently assigned and is being paid. This state is the default state for all earnings generated by the system.

SUTA State

Specify the SUTA state for the employee. This field is for informational purposes only.

Curr. Misc. Loc

Specify the current taxing locality in which the employee is being paid. This value is the default for generated time entry records. This value is associated with employer code type LCN and locality type 4, miscellaneous.

Curr. County

Type the current county in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 1, county.

Curr. City

Specify the current city in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 2, city.

Curr. Sch. Dist

Specify the current school district locality in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 3, school district.

Home Tax Co

For multi-tax processing only, to associate this employee with a federal tax company that is different from the tax company specified on the payroll master record, specify the tax company code value here. Leave blank if the employee is hired under the default tax company.

Payroll Cycle

Specify the payroll cycle to be used to pay the employee. This payroll cycle code is used to update the *Payroll Cycle* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify a *Payroll Cycle* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee's payroll data record.

AutoPay Group

Specify the autopay group to use to generate income records for the employee in payroll. This autopay group code is used to update the *AutoPay Group* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify an *AutoPay Group* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee's payroll data record.

Next Review

Specify the code value that identifies the next type of appraisal or performance review the employee is scheduled to receive. Use code type RTP in *Update Employer Codes* to define code values for this field.

If you are typing a current transaction, the system updates the *Next Review* field in the employee's basic data record with this code value when you complete the Performance Review transaction. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

Next Review Date

Specify the date on which the employee is next scheduled to receive a performance review.

If you are typing a current transaction, the system updates the *Next Review Date* field in the employee's basic data record with this date. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

3. Press Enter to exit to the Personnel Trans. More Info Window and save your information.

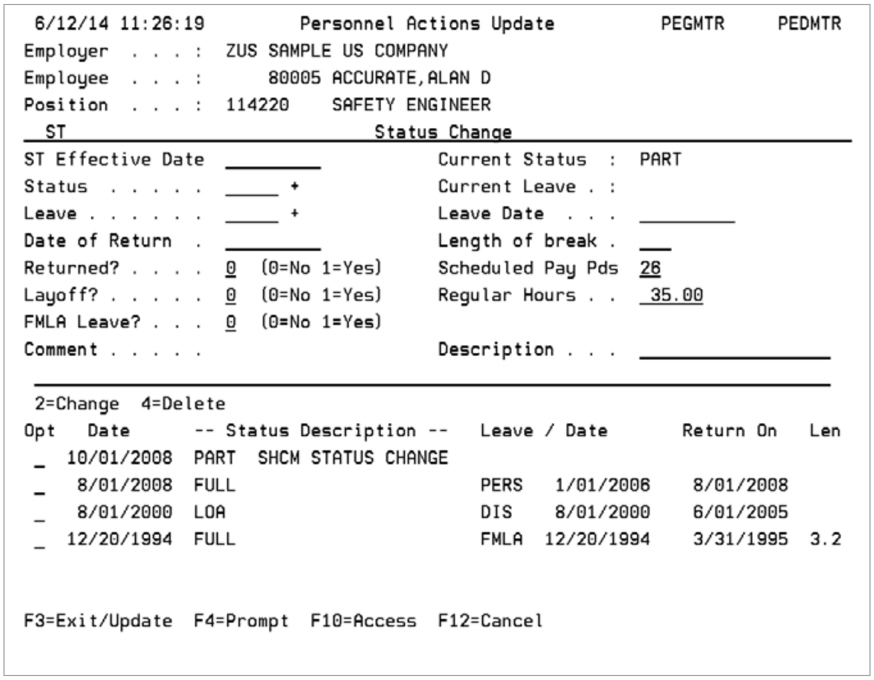
4. Press Enter to exit to the Personnel Action Update screen and save your information.

5. Enter another PE action or press F3 to exit to the main menu.

Entering a Status Change Transaction

You use the status change transaction to change the value in the employee's *Status* field, to place the employee on a leave of absence or layoff, or to return the employee from a leave of absence or layoff. Use the following information to type a status change transaction.

1 From the *Enter Personnel Actions* prompt screen, select the **ST** transaction and press Enter. The system displays the screen shown in Figure 14-8.



```
 6/12/14 11:26:19         Personnel Actions Update         PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80005 ACCURATE,ALAN D
Position  . . . :  114220    SAFETY ENGINEER
  ST                              Status Change
ST Effective Date  _________              Current Status  :  PART
Status  . . . . .  _____ +                Current Leave . :
Leave . . . . . .  _____ +                Leave Date  . . .  _________
Date of Return  .  _________              Length of break .  ___
Returned? . . . .  0  (0=No 1=Yes)        Scheduled Pay Pds  26
Layoff? . . . . .  0  (0=No 1=Yes)        Regular Hours . .   35.00
FMLA Leave? . . .  0  (0=No 1=Yes)
Comment . . . . .                         Description . . .  __________________

 2=Change  4=Delete
Opt   Date       -- Status Description --    Leave / Date       Return On   Len
 _  10/01/2008  PART  SHCM STATUS CHANGE
 _   8/01/2008  FULL                         PERS   1/01/2006    8/01/2008
 _   8/01/2000  LOA                          DIS    8/01/2000    6/01/2005
 _  12/20/1994  FULL                         FMLA  12/20/1994    3/31/1995  3.2


F3=Exit/Update  F4=Prompt  F10=Access  F12=Cancel
```

Figure 14-8: Personnel Actions Update Status Change screen

2 Use the following information to fill in the fields on this screen:

Depending on the way you use the status change transaction, the system updates different fields in the employee's basic data record.

- If you change the value in the employee's *Status* field in the status change transaction, the system updates the *Status, Previous Status* and *Status Chg Date* fields in the employee's basic data record.
- If you type a leave of absence or layoff, the system also updates the *Leave, Leave Date, Length of Break, Date of Return and Layoff?* fields in the employee's basic data record.

When you place the employee on a leave of absence, the system displays the words **On Leave** adjacent to the employee's name on the Employee Locate display. When you place the employee on a layoff, the system displays the words **Laid Off** adjacent to the employee's name on the Employee Locate display.

If the *Pay EEs on Leave* field on the Infinium PY employer control record is **0**, the system checks the employee's *Leave Date* field during the begin stage of payroll cycle processing to determine if the employee should be paid in current payroll cycle. If the employee is on a leave of absence, the system does not include the employee in the payroll cycle, although the payroll processor can manually import the employee into the pay cycle if necessary.

You must type information in the *ST Effective Date* and *Status* fields for all status change transactions. If you are typing a leave of absence, you also must type information in the *Leave* and *Leave Date* fields. If you are entering a layoff, you must also type information in the *Leave, Leave Date* and *Layoff?* fields.

- If you specify that the leave is an FMLA leave, the system updates the *FMLA Leave?* field on the employee's basic data record.

Updating Payroll Data

When you enter a status transaction, the system also updates the annual wage base in the payroll master file, PYPMS, if you change an hourly employee's regular hours. Changing the value in the *Scheduled Pay Periods* field on the Personnel Actions Update screen does not affect the annual wage base.

Displaying and Printing Status Change Information

The status change transactions create a history of the employee's employment events, including leaves of absence and layoffs. You can use the *Display Employee History* function to review an employee's status change transactions. You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels* and *List PE Actions by Employee* reports to print status change transaction information.

ST Effective Date

Type the effective date of the employee's status change. If you type a date that is the same as or earlier than the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data record with the status change transaction information as soon as you press Enter to store the information in the sub-file, and then press F3 to exit from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's basic data record until you execute the *Mass Update Personnel Actions* function.

Current Status

The system displays the code value that identifies the employee's current employment status in this field. The system defaults information into this field from the *Status* field in the employee's basic data record.

Status

Type the code value that identifies the employee's new employment status. Press F4 to display a list of valid code values. You use code type **STS** to define code values for this field.

If you are typing a leave of absence or layoff, you generally retype the employee's current *Status* code value in this field and use the *Leave* field below to specify if the employee is on a leave of absence or layoff.

Current Leave

The system displays the code value that identifies employee's current type of leave of absence, if any. The system defaults information into this field from the *Leave* field in the employee's basic data record.

Leave

If you are entering a leave of absence or layoff for an employee, type the code value that identifies the type of leave of absence that the employee is taking. Press F4 to display a list of valid code values. You use code type **LVC** to define code values for this field.

After you type a value in this field and update the status change transaction, the system displays the **On Leave** message adjacent to the employee's name on the Employee Locate screen.

Since you also use the *Leave* field to place the employee on a layoff, you may want to define a special code value for code type **LVC** that signifies a layoff.

Leave this field blank if you are not typing a leave of absence or layoff for the employee.

Leave Date

If you are typing a leave of absence or layoff for the employee, type the date on which he or she begins his or her leave or layoff. This date is generally the same as the *ST Effective Date*.

Date of Return

If you are typing a leave of absence or layoff for the employee, type the date on which he or she is expected to return to work. You can update this field with the actual date the employee returns to work after he or she completes his or her leave of absence or layoff. This is an optional informational field that does not cause any system processing to occur.

Length of break

If you are typing a leave of absence or layoff for the employee, type the length of time you expect he or she to be absent from work. You can update this field with the actual break in service period when the employee returns to work. This is a 3-character free-form field that does not require pre-defined values. It is an optional informational field that does not cause any system processing to occur.

Returned?

Type **1** in this field to indicate that the employee has returned from his or her leave of absence or layoff. You can update this field on the employee's original status change transaction that was used to place the employee on a leave of absence or layoff, or you can create a new status change transaction to record the employee's return to work.

After you type **1** in this field and update the status change transaction, the system removes the **On Leave** or **Laid Off** message adjacent to the employee's name on the Employee Locate screen.

Layoff?

Type **1** in this field to indicate that the employee has been laid off from his or her work assignment. After you type **1** in this field and update the status change transaction, the system displays the **Laid Off** message adjacent to the employee's name on the Employee Locate screen.

Scheduled Pay Pds

The system defaults information into this field based on the *Scheduled Pay Pds* field in the employee's basic data record. This field indicates the number of pay periods per year in which the employee is expected to be paid. You can update this information if necessary.

Regular Hours

The system defaults information into this field based on the *Regular Hours* field in the employee's basic data record. This field indicates the number of hours per pay period that the employee is expected to work. You can update this information if necessary.

Description

You can use this field to type any additional information about the status change transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the status change transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Status Change screen.

If you entered a future date in the *ST Effective Date* field, the system highlights the transaction and displays the following message:

***Unprocessed transaction - employee basic data will not be updated.**

The system processes this transaction and updates the employee's basic data record with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the mass update that is the same as or after the effective date of the status change transaction.

4 Press F3 to exit from this screen and store this status change transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

The system updates the employee's information in basic data differently depending on whether you typed a status change, leave of absence or layoff.

Entering a Blood Donation Transaction

You use this transaction to track the date of an employee's blood donation, along with any related comments or descriptions. Use the following information to type the blood donation transaction.

1 From the *Enter Personnel Actions* prompt screen, select the **BD** transaction and press Enter. The system displays the screen shown in Figure 14-9.

```
 6/12/14 11:28:15        Personnel Actions Update        PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80005 ACCURATE,ALAN D
   BD                           Blood Donation
BD Effective Date  _________          Description . . .  __________________
Comment . . . . .

 2=Change  4=Delete
 Opt   Date          Description          Opt   Date          Description
  _  12/25/1994

F3=Exit/Update  F4=Prompt  F10=Access  F12=Cancel
```

Figure 14-9: Personnel Actions Update Blood Donation screen

2 Use the following information to fill in the fields on this screen:

After you type a blood donation transaction, the system updates the *Last Donation* field on the first screen of the employee's personnel data record.

The *BD Effective Date* field is required.

Displaying and Printing Blood Donation Information

The blood donation transactions create a history of the employee's blood donations over time. You can use the *Display Employee History* function to review an employee's status change transactions. You can use the *List PE*

Actions, List PE Action Details, List PE Actions by Levels and *List PE Actions by Employee* reports to print blood donation transaction information.

BD Effective Date

Type the effective date of the employee's blood donation. If you type a date that is the same as or earlier than the system date displayed in the upper left-hand corner of the screen, the system updates the employee's personnel data record with the blood donation transaction information as soon as you press Enter, and then F3 from this screen.

This transaction does not currently have future-dated processing. If you type an effective date that occurs after the system date, the system does not update the *Last Donation* field in the employee's personnel data record, and the *Mass Update Personnel Actions* function does not process this transaction.

Description

You can use this field to type any additional information about the blood donation transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the blood donation transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Blood Donation screen.

4 Press F3 to exit from this screen and store this blood donation transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

If you typed an effective date that is the same as or prior to the system date in the upper left-hand corner of the Blood Donation screen, the system updates the *Last Donation* field in the employee's personnel data record.

Reviewing the Hire Transaction

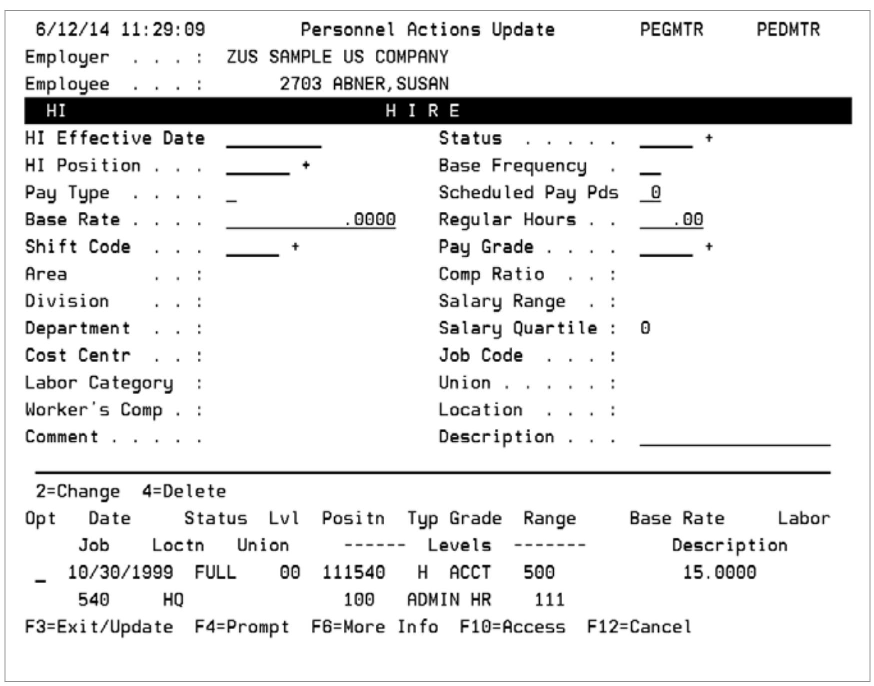
You use the hire transaction to review the hire transaction record created when you used the *Enter New Hire* or *Update Employee Data* functions to hire a new employee. This screen shows a historical record of key information from the employee’s original hire transaction.

You can also update the employee’s original new hire transaction. If you have not entered additional personnel actions for the employee, the system updates fields in the employee’s basic data record with the changes you make to information in the hire transaction screen.

You do not use the hire transaction to hire employees onto Infinium HR. You use the *Enter New Hire* or the *Update Employee Data* functions to hire employees. Use the following information to review a hire transaction.

Follow these steps to review the employee’s hire transaction record:

1 From the *Enter Personnel Actions* prompt screen, select the **HI** transaction and press Enter. The system displays the screen shown in Figure 14-10.



```
 6/12/14 11:29:09        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
  HI                                H I R E
HI Effective Date  _________              Status  . . . . .  _____ +
HI Position . . .  ______ +               Base Frequency  .  __
Pay Type  . . . .  _                      Scheduled Pay Pds  _0
Base Rate . . . .  ___________.0000       Regular Hours . .  ____.00
Shift Code  . . .  _____ +                Pay Grade . . . .  _____ +
Area        . . :                         Comp Ratio  . . :
Division    . . :                         Salary Range  . :
Department  . . :                         Salary Quartile :  0
Cost Centr  . . :                         Job Code  . . . :
Labor Category  :                         Union . . . . . :
Worker's Comp . :                         Location  . . . :
Comment . . . . .                         Description . . .  _________________

 2=Change  4=Delete
Opt   Date     Status  Lvl  Positn  Typ Grade  Range     Base Rate     Labor
     Job    Loctn   Union     ------  Levels  -------        Description
 _  10/30/1999  FULL    00  111540   H  ACCT   500           15.0000
     540     HQ               100   ADMIN HR    111
F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-10: Personnel Actions Update Hire screen

2 Use the following information to interpret the fields on this screen:

The system automatically creates the hire transaction when you use the *Enter New Hire* or *Update Employee Data* functions to hire a new employee. When you implement Infinium HR, you use one of the conversion programs to programmatically create a hire transaction for each employee.

Whether you hire the employee manually or with a program, you normally do not update the hire transaction screen unless you are correcting an error in the original new hire transaction immediately after you enter the hire transaction or run the conversion program.

If you make changes to the hire transaction after you have entered other personnel actions with effective dates after the employee's original date of hire, the system does not update the employee's basic data record with the new hire transaction information and displays an error message in the confirmation window.

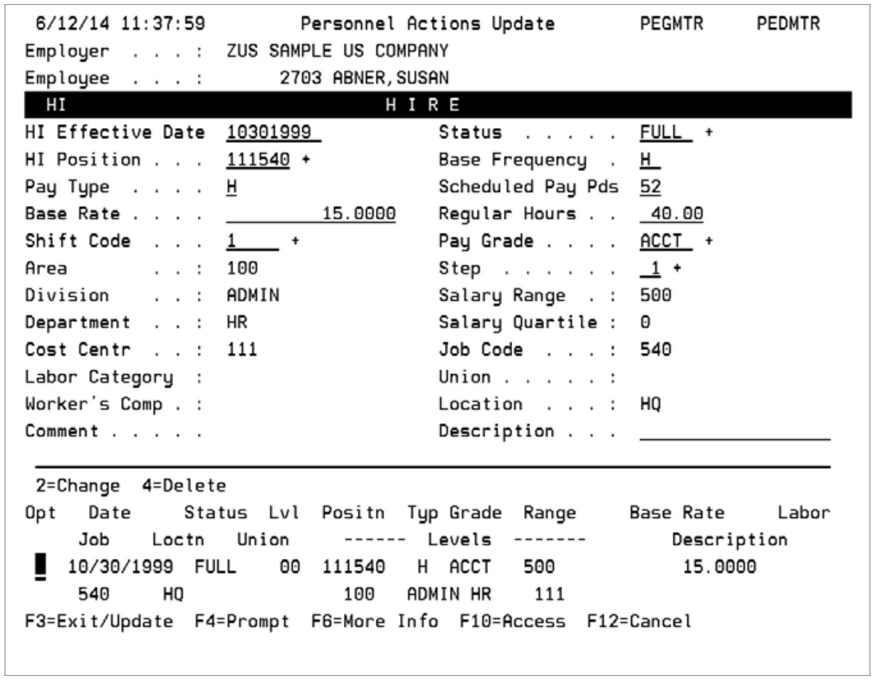
Displaying and Printing Hiring Information

The hire transaction is stored in the employee's on-line history. You can use the *Display Employee History* function to review an employee's hire transaction. You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels, List PE Actions by Employee, List New Hires- Detail, List New Hires-Summary and Date of Hire Anniversary Listing* reports to print hire transaction information.

The *HI Effective Date, Status, HI Position, Base Frequency, Pay Type, Scheduled Pay Pds, Base Rate* and *Regular Hours* fields are required. Information for these fields defaults from the hire transaction created when you used the *Enter New Hire* and *Update Employee Data* functions.

Reviewing the Hire Transaction

3 The employee's hire transaction information is stored in the sub-file at the bottom of the hire transaction screen. To review the information, type **2** in the *Opt* field next to the lines of information in the sub-file, and then press Enter. The system displays the information in the top portion of the hire transaction screen as shown in Figure 14-11.


```
 6/12/14 11:37:59        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
  HI                              H I R E
HI Effective Date  10301999           Status  . . . . .  FULL  +
HI Position . . .  111540 +           Base Frequency  .  H
Pay Type  . . . .  H                  Scheduled Pay Pds  52
Base Rate . . . .           15.0000   Regular Hours . .   40.00
Shift Code  . . .  1     +            Pay Grade . . . .  ACCT  +
Area        . . :  100                Step  . . . . . .   1 +
Division    . . :  ADMIN              Salary Range  . :  500
Department  . . :  HR                 Salary Quartile :  0
Cost Centr  . . :  111                Job Code  . . . :  540
Labor Category  :                     Union . . . . . :
Worker's Comp . :                     Location  . . . :  HQ
Comment . . . . .                     Description . . .

 2=Change  4=Delete
Opt   Date     Status  Lvl  Positn  Typ Grade  Range     Base Rate     Labor
     Job    Loctn   Union     ------  Levels  -------       Description
    10/30/1999  FULL    00  111540   H  ACCT   500           15.0000
     540     HQ              100   ADMIN HR    111
F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-11: Personnel Actions Update Hire screen

4 After you review the employee's original hire transaction information, press Enter to return the information to the sub-file of the screen. If you have entered personnel action transactions for the employee with effective dates after the employee's original date of hire, the system displays the following warning message in the 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.**

5 Press Enter to return the information to the subfile of the screen and then press F3 to return to the *Enter Personnel Actions* prompt screen.

Making Changes to the Hire Transaction

You generally do not make changes to the employee's hire transaction. However, if you need to make changes to the hire transaction information, you can do so. You can type new information in any of the fields on the hire transaction screen that are not protected fields.

The system uses the changed information to update the employee's basic data record if the employee has no personnel actions with effective dates after the hire date. The system updates the fields shown in the table below.

If you have already entered other personnel actions for the employee, the system keeps the updated hire transaction information in the employee's history but does not use it to update his or her basic data record. When you press Enter to store the updated information in the sub-file of the employee's hire transaction screen, the system generates a warning message shown above indicating that the employee has transactions that are dated after the hire transaction. When you receive the warning message, press Enter to override the message and return the updated hire transaction to the sub-file of the screen.

After you have updated all necessary information, press F3 to return to the prompt screen for the *Enter Personnel Actions* function. The system does not keep the changes to this transaction if you press F12 to exit from this screen.

Entering or Updating Payroll Locality Information for Hire Transactions

When you are processing a hire transaction, you can enter or update state, locality, user field and home tax company information. Follow the steps below to enter this information.

1 On the Personnel Actions Update Hire screen, press F6. The system displays the Personnel Trans. More Info Window shown in Figure 14-12.

```
 6/12/14 11:38:49        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
  HI                                H I R E
HI Effective Date  _________         Status  . . . . .  _____  +
HI Position . . .  ______ +          Base Frequency  .  __
Pay Type  . . . .  _                 Scheduled Pay Pds  _0
Base
Shift                 Personnel Trans. More Info Window
Area        User Field 1  . .  _____ + User Field 3  . .  __________  +
Divis       Current State . .  ___ +   Home State  . . .  ___ +
Depar       SUTA State  . . .  ___ +
Cost        Curr. Misc. Loc .  ___ +   Home Misc. Loc. .  ___ +
Labor       Curr. County  . .  ___ +   Home County . . .  ___ +
Worke       Curr. City  . . .  ___ +   Home City . . . .  ___ +
Comme       Curr. Sch. Dist .  ___ +   Home Sch. Dist. .  ___ +
 ____       Home Tax Co . . .  _____ +
 2=Ch       Payroll Cycle . .  _____ + AutoPay Group . .  _____ +
Opt    F8=Populate  F10=QuikAccess  F12=Previous                          or

 _  10/30/1999  FULL    00  111540   H  ACCT   500           15.0000
     540     HQ               100   ADMIN HR    111
F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-12: Personnel Trans. More Info Window

2 Use the information below to complete the fields in the Personnel Trans. More Info Window or press F8 to activate a custom program to enter the values in the fields.

User Field 1

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

User Field 3

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

Current State

Specify the state code value where the employee is currently assigned and is being paid. This state is the default state for all earnings generated by the system.

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.

SUTA State

Specify the SUTA state for the employee. This field is for informational purposes only.

Curr. Misc. Loc

Specify the current taxing locality in which the employee is being paid. This value is the default for generated time entry records. This value is associated with employer code type LCN and locality type 4, miscellaneous.

Home Misc. Loc

If this employee is a resident of a locality, specify the home miscellaneous taxing locality. If this employee is not a resident of a locality, leave this field blank.

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

Curr. County

Specify the current county in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 1, county.

Home County

If this employee is a resident of this county, specify the home county taxing locality for this employee. If this employee is not a resident of this locality, leave this field blank.

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

Curr. City

Specify the current city in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 2, city.

Home City

If this employee is a resident of a city, specify the home city taxing locality. If this employee is not a resident of a city, leave this field blank.

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

Curr. Sch. Dist

Specify the current school district locality in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 3, school district.

Home Sch. Dist.

If this employee is a resident of a school district, specify the home school district taxing locality for this employee. If this employee is not a resident of a school district, leave this field blank.

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

Home Tax Co

For multi-tax processing only, to associate this employee with a federal tax company that is different from the tax company specified on the employer control, specify the tax company code here. Leave blank if the employee is hired under the default tax company.

Payroll Cycle

Specify the payroll cycle to be used to pay the employee. This payroll cycle code is used to update the *Payroll Cycle* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify a *Payroll Cycle* value in the *Update Position Defaults* function.

For the *Enter New Hire* function, the *Payroll Cycle* field from the position defaults takes precedence as the default value over any payroll cycle defaults set up in the organization levels or employer control records.

AutoPay Group

Specify the autopay group to use to generate income records for the employee in payroll. This autopay group code is used to update the *AutoPay Group* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify an *AutoPay Group* value in the *Update Position Defaults* function.

For the *Enter New Hire* function, the *AutoPay Group* field from the position defaults takes precedence as the default value over any autopay group defaults set up in the organization levels or employer control records.

3. Press Enter to exit to the Personnel Trans. More Info Window and save your information.
4. Press Enter to exit to the Personnel Action Update screen and save your information.
5. Enter another PE action or press F3 to exit to the HR main menu.
6. Press Enter to exit to the Personnel Actions Update screen and save your information.
7. Press F3 to exit to the main menu.

Updates to Employee Basic Data and Payroll Data

The system updates the employee's basic data, personnel data and payroll data records with the new information as shown in the table below.

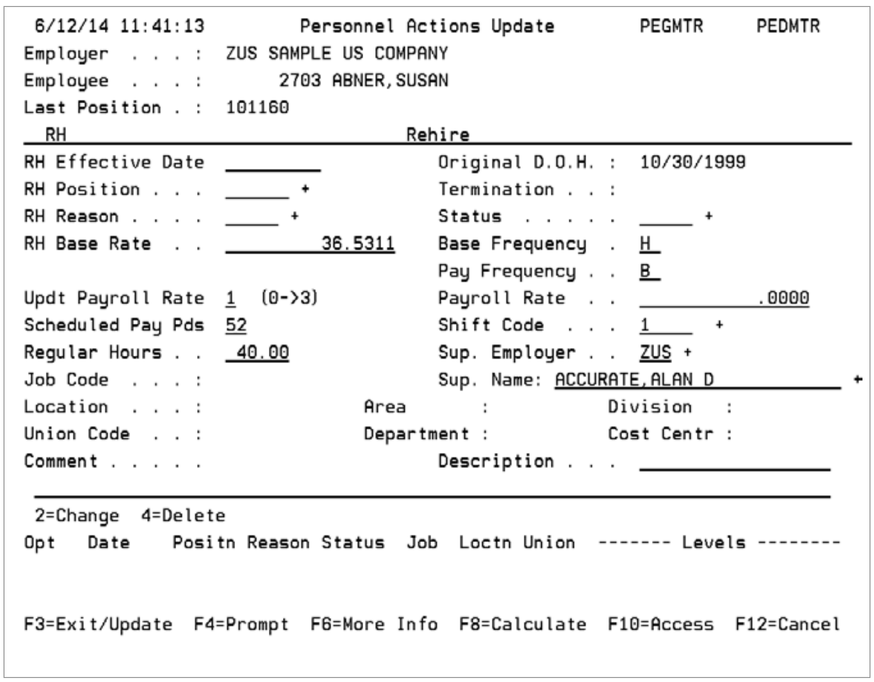
Field Name	Location
Date of Hire *Levels 1, 2, 3, 4* *Location* *User Field 1* *User Field 3*	Basic Data, Screen 1

Field Name	Location
Position *Position Title* *Job Code 1* *Seniority Date (first)* *EEO Category* *Status* *Status Chg Date* *Union* *Shift* *PE Benefit Group*	Basic Data, Screen 2
Workers Comp. *Labor Category*	Basic Data, Screen 3
Regular Hours *Scheduled Pay Pds* *Base Rate* *Base Frequency* *Pay Grade* *Pay Grade Date* *Step* *Step Date* *Next Step* *Next Step Date* *Salary Range* *Salary Quartile* *Comp Ratio*	Basic Data, Screen 4
Season	Personnel Data, Screen 1
Job Change Date	Personnel Data, Screen 3
Payroll Cycle *Auto Pay Group*	Payroll Data, Screen 1
Current County *Home County* *Current City* *Home City* *Curr School Dist* *Home School Dist* *Current Misc Loc* *Home Misc. Loc* *Current State* *Home State* *SUTA State* *Home Tax Co (multi-tax only)*	Payroll Data, Screen 2

Entering a Rehire Transaction

You use this function to rehire a terminated employee, if his or her records already exist in your Infinium HR database. When you rehire an employee, the system removes information from the *Terminated* field on his or her basic data record so that the system recognizes the employee as active for processing functions, displays and reports.

1 From the *Enter Personnel Actions* prompt screen, select the **RH** transaction and press Enter. The system displays the screen shown in Figure 14-13.



```
 6/12/14 11:41:13        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
Last Position . :  101160
  RH                                 Rehire
RH Effective Date  ________          Original D.O.H. :  10/30/1999
RH Position . . .  ______ +          Termination . . :
RH Reason . . . .  _____ +           Status  . . . . .  _____ +
RH Base Rate  . .  _________36.5311  Base Frequency  .  H_
                                     Pay Frequency . .  B_
Updt Payroll Rate  1  (0->3)         Payroll Rate  . .  __________.0000
Scheduled Pay Pds  52                Shift Code  . . .  1____ +
Regular Hours . .  _40.00            Sup. Employer . .  ZUS +
Job Code  . . . :                    Sup. Name: ACCURATE,ALAN D____________ +
Location  . . . :             Area       :            Division   :
Union Code  . . :             Department :            Cost Centr :
Comment . . . . .                    Description . . .  _________________

 2=Change  4=Delete
Opt   Date    Positn Reason Status  Job  Loctn Union  ------- Levels --------


F3=Exit/Update  F4=Prompt  F6=More Info  F8=Calculate  F10=Access  F12=Cancel
```

Figure 14-13: Personnel Actions Update Rehire screen

2 Use the following information to fill in the fields on this screen:

You use the rehire transaction to update key information in the employee’s basic data record including his or her position assignment, job assignment, levels and personnel base rate. The rehire function can also update the rehired employee’s payroll base rate. See the table beginning on page 14-5 for a comprehensive list of the fields the system can update.

The fields that change in the employee’s basic data record when you enter a rehire transaction depend upon the information in the employee’s new job and position record. See the *Infinium HR Guide to Controls* for details on how to establish these control records.

You must type information in the *RH Effective Date, RH Position* and *Status* fields.

Displaying and Printing Rehire Information

The rehire transaction is included in the employee's on-line history. You can use the *Display Employee History* function to review an employee's rehire transaction(s). You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels* and *List PE Actions by Employee* reports to print rehire transaction information.

Updating Payroll Data

When you enter a rehire transaction, you can affect payroll processing if the new position contains level, job or payroll authorization group values that differ from the employee's previous position.

The system can use the level and job values during payroll cycle processing to generate labor expense account numbers; later, the system can use these fields to generate general ledger accounts for employer liabilities and employee deductions.

Reviewing the Audit Report

If personnel users are authorized to update the value in the *PY Auth Group* field in the employee's payroll data record, the system also automatically updates employee income and deduction authorizations. Infinium HR and Infinium PY users should carefully review the audit report of the changes the system makes to employee income and deduction authorizations when the payroll authorization group value changes. The system generates the report using interactive processing and assigns printer file name **PYTMBGAU**. You can access this report from the Work with All Spooled Files screen.

Additional Employee Updates

After you complete a rehire transaction, you generally need to review or update other information for the rehired employee which may include some or all of the areas below.

Category of Information	Location	Information to Review
Benefit Enrollments	Infinium HR	Benefit group assignment and prior plan enrollments

Category of Information	Location	Information to Review
Payroll Data	Infinium PY	Pay cycle assignment, auto pay group assignment; federal and state/provincial tax fields, payroll authorization group, payroll rate(s), and so on
Income Data	Infinium PY	Income authorizations to ensure suitability for employee's current work assignment
Deduction Data	Infinium PY	Deduction authorizations to ensure suitability for employee's current work assignment and work/home locations
Basic Data	Personnel or Infinium PY	▪ Adjusted D.O.H. field ▪ Name, address and telephone information (can use personal change transaction in Enter Personnel Actions to update) ▪ Next Review and Next Review Date fields ▪ Paid-time-off accrual information
Personnel Data	Infinium HR	▪ Marital Status, Dependents, and Spouse Name fields ▪ Emergency contact information

RH Effective Date

Type the employee's rehire date. If you type a date that is the same as or prior to the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data and payroll data records with the rehire transaction information as soon as you press Enter to save the information in the sub-file, and then press F3 to exit from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's records until you execute the *Mass Update Personnel Actions* function.

Original D.O.H.

The system displays the employee's original date of hire in Infinium HR. This date defaults from the *Hire Date* field in the employee's basic data record. You cannot change this date on the Rehire screen.

RH Position

Type the code that represents the position into which you are rehiring the employee. Press F4 to display a list of positions in the specified employer. The system uses information from the position control records to display each position's authorized headcount, current staffing levels and openings. You can type any character in the *Opt* field next to the employee's new position and press Enter to automatically fill in the *RH Position* field.

When you select a position from the F4 display, the system automatically updates the *Job code, Location, Union, Shift Code and Level* fields on the Rehire screen with information from the new position control record.

Termination

The system displays the code value that represents the termination reason code associated with the employee's termination transaction. You cannot update the information in this field on this screen.

RH Reason

Type the code value that indicates why the employee is being rehired. You define code values for this field using code type **RHC**. Press F4 to display a list of valid code values.

Status

Type the code value that indicates the employee's new employment status. You define code values for this field using code type **STS**. Press F4 to display a list of valid values.

RH Base Rate

The system displays the employee's previous base rate in this field, which defaults from the *Base Rate* field in the employee's basic data record. You can type a new rate in this field if necessary. The system updates the employee's *Base Rate* field in basic data with the new rate when you exit the rehire transaction screen.

Base Frequency

Type the value that describes the way the system should interpret the employee's base rate. Ensure that the value you select is consistent with the employee's new base rate. 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 Frequency

Type the value that indicates how often the employee is scheduled to be paid. 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

Updt Payroll Rate

Use this field to specify whether the system should automatically update one of the employee's payroll rates when you exit from the Rehire screen.

You cannot update payroll rates unless personnel users have been authorized to do so on the Infinium PY employer control record. The system checks the *PE Updt Pay Rates* field on the Infinium PY employer control record; you are allowed to update payroll rates if the value in this field is **1**.

Valid values for this field are:

0	Do not update payroll rates.
1	Update the *Base Rate* field in the payroll data record.
2	Update the *2nd Payroll Rate* field in the payroll data record.
3	Update the *3rd Payroll Rate* field in the payroll data record.

Payroll Rate

Type the new rate that the system should use to calculate the employee's pay during Infinium PY cycle processing. You should discuss with payroll users at your site the appropriate way to complete the *Payroll Rate* field. They may use each payroll rate differently for different employees or for different types of income calculations during cycle processing.

For example, you state the payroll base rate for salaried non-exempt employees on a monthly basis, and state the 2nd payroll rate for these employees on an hourly basis since it is used for overtime calculations. You use the payroll *Base Rate* field only for hourly employees, which is stated on an hourly basis.

The payroll rate(s) may not be the same as the rate in the *RH Base Rate* field. The system uses the *RH Base Rate* field only for Infinium HR functions, so personnel users are free to state the rate in a way that best supports their business needs. Payroll users make independent decisions on how to state the payroll rates so that they best fit the way incomes are calculated.

When you type **1** in this field, the system automatically updates the employee's *Base Rate* field in basic data and the *Base Rate* field in payroll data. When you type **2** in this field, the system updates the *Base Rate* field in basic data and the *2nd Payroll Rate* field in payroll data. When you type **3** in this field, the system updates the *Base Rate* field in basic data and the *3rd Payroll Rate* field in payroll data.

Using the *Calculate* Function F8

You can press F8 to have the system automatically calculate and fill in the *Payroll Rate* field. The system calculates an hourly payroll rate if the value in the employee's *Pay Type* field is **H**, which indicates the employee is paid by the hour on payroll. If the value in the *Pay Type* field is **N** (indicating a non-exempt salaried employee) or **S** (indicating an exempt salaried employee), the system calculates the payroll rate based on the *Pay Frequency* field.

For example, you enter a salary change transaction for a non-exempt salaried employee whose personnel base rate is stated on a monthly basis and payroll base rate is stated on a weekly basis. The value in the employee's *Pay Type* field is **N**, her *Pay Frequency* is **W** (indicating she is paid on a weekly basis), her new *SC Base Rate* is $1000 and her *SC Base Frequency* is **M** (indicating her personnel base rate is stated on a monthly basis).

When you press F8, the system annualizes the employee's new *SC Base Rate* by multiplying $1000 x 12, and then divides the result by 52 to compute a weekly pay rate of $230.77 for the employee's new payroll base rate.

If the *Pay Type* for the same employee is **H**, the system divides the employee's annualized *SC Base Rate* of $12,000 by the value in the *Scheduled Pay Pds* of **52** and the value in the *Regular Hours* field of **40** to compute an hourly payroll rate of $5.7692.

The *Calculate* function does not work if you are not authorized to update payroll rates.

Scheduled Pay Pds

The system defaults information into this field based on the *Scheduled Pay Pds* field in the employee's basic data record. This field indicates the number of pay periods per year in which the employee is expected to be paid. You can update this information if necessary.

Regular Hours

The system defaults information into this field based on the *Regular Hours* field in the employee's basic data record. This field indicates the number of hours per pay period that the employee is expected to work. You can update this information if necessary.

Shift Code

The system defaults information into this field based on the *Shift* field in the employee's basic data record. The system uses the shift code value to compute shift or other premiums during payroll cycle processing. You can update this code if necessary. You define code values for this field using code type **SFT**.

Step

If you typed a position associated with a step-in-grade job in the *RH Position* field, the system replaces the *Location* and *Union Code* fields on this screen with the *Pay Grade* and *Step* fields.

The system defaults the code assigned to the pay grade associated with the employee's new job into the *Pay Grade* field. You cannot type in the *Pay Grade* field.

The system also defaults a value into the *Step* field based on the *Step Number* field on the job control record. This is normally the starting step for a new employee. You can update this field if necessary. Ensure that the rates you type in the *RH Base Rate* and *Payroll Rate* fields are consistent with the rate specified for this step on the pay grade control record.

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.

Description

You can use this field to type any additional information about the rehire transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the rehire transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Rehire screen. The system updates the protected fields on this screen including the *Levels, Job Code, Location* and *Union* fields, depending on the information on the employee's new position control record.

The system performs the following actions:

- If you entered a future date in the *RH Effective Date* field, the system highlights the transaction and displays the following message:

***Unprocessed transaction - employee basic data will not be updated.**

The system processes this transaction and updates the employee's basic data and personnel data records with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the mass update that is the same as or after the effective date of the rehire transaction.

- If you selected a rehire position that has no openings, the system displays the following warning message in a confirmation window:

  WARNING: Authorized workforce level exceeded. This entry will cause the authorized workforce level to be exceeded for this position (as of the date specified). You may override this error. Press ENTER to accept the error or CANCEL to return.

  Perform one of the following actions to remove the warning box from the screen:

  - Press Enter to move the employee to the new position, even though by doing so you exceed the authorized headcount for this position.
  - Press F12 to return to the Rehire screen so that you can select a different position.

- If you select a Rehire position that has been defined as a single position, the system displays the following warning message in a confirmation window:

  WARNING: Position has already been assigned. The position to which you wish to hire, transfer, or promote an employee already has an employee assigned to it. If you wish to replace this EE number with that of the employee you are entering, you may do so by overriding this error. Press ENTER to accept the error or CANCEL to return.

  Perform one of the following actions to remove the warning box from the screen.

  - Press Enter to move the employee to the new position, even though by doing this you cause two employees to be assigned to a position that has been defined as a single position on the position control record.
  - Press F12 to return to the Rehire screen so that you can select a different position.

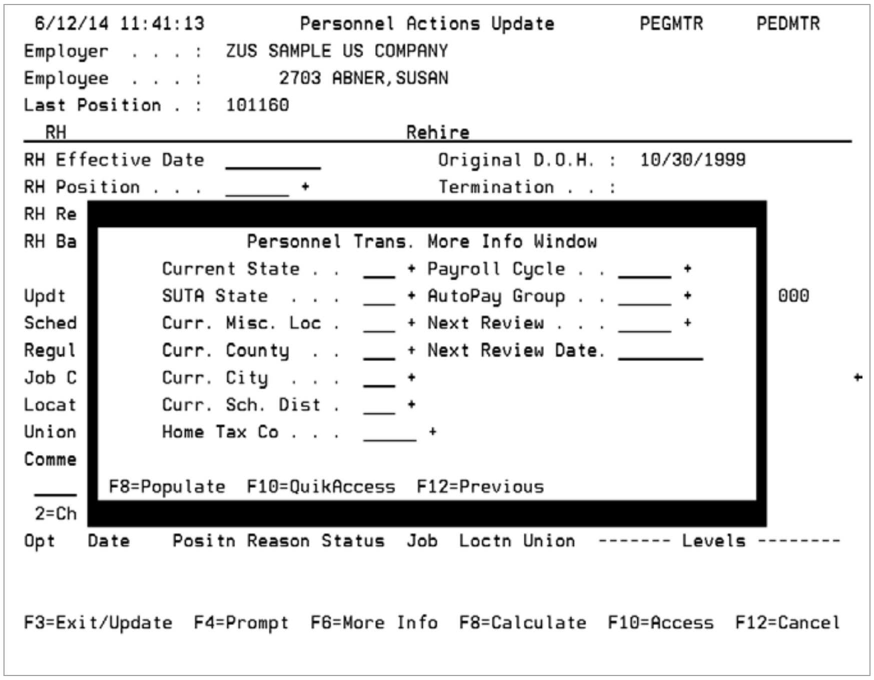
4 Press F3 to exit from this screen and store the rehire transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen. The system performs the following actions:

- If the date you typed in the *RH Effective Date* field is the same as or prior to the system date, the system automatically activates the employee's record by removing the information from the *Termination, Termination Date, Last Day Worked* and *Rehire* fields.
- The system updates the *Seniority Date, Status Chg Date* and *Rehire Date* fields with the employee's rehire effective date. It uses the employee's rehire position and job assignment to update many fields in the employee's basic data record as shown in the table beginning on page 14-5.
- If as a result of the rehire transaction the employee should be assigned to a new payroll authorization group and Infinium HR users are allowed to update this information, the system automatically updates the value in the *PY Auth Group* field in the employee payroll data record.
- It also updates the employee's income and deduction authorizations and generates the Payroll Authorization Group Changes to Income and Deductions audit report. Access the Work with All Spooled Files screen and locate printer file **PYTMBGAU** to review or print this report.

Entering or Updating Payroll Locality Information for Rehire Transactions

When you are processing a rehire transaction, you can enter or update state, locality and home tax company information. Follow the steps below to enter this information.

1 On the Personnel Actions Update Promotion screen, press F6. The system displays the Personnel Trans. More Info Window shown in Figure 14-14.



```
 6/12/14 11:41:13        Personnel Actions Update        PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
Last Position . :  101160
  RH                                 Rehire
RH Effective Date  _________            Original D.O.H. :  10/30/1999
RH Position . . .  ______ +             Termination . . :
RH Re
RH Ba              Personnel Trans. More Info Window
         Current State . .  ___ + Payroll Cycle . .  _____ +
Updt     SUTA State  . . .  ___ + AutoPay Group . .  _____ +       000
Sched    Curr. Misc. Loc .  ___ + Next Review . . .  _____ +
Regul    Curr. County  . .  ___ + Next Review Date.  ________
Job C    Curr. City  . . .  ___ +                                      +
Locat    Curr. Sch. Dist .  ___ +
Union    Home Tax Co . . .  _____ +
Comme
 ____   F8=Populate  F10=QuikAccess  F12=Previous
 2=Ch
Opt   Date    Positn Reason Status  Job  Loctn Union  ------- Levels --------


F3=Exit/Update  F4=Prompt  F6=More Info  F8=Calculate  F10=Access  F12=Cancel
```

Figure 14-14: Personnel Trans. More Info Window

2 Use the information below to complete the fields in the Personnel Trans. More Info Window or press F8 to activate a custom program to enter values in the fields.

Current State

Specify the state code value where the employee is currently assigned and is being paid. This state is the default state for all earnings generated by the system.

SUTA State

Specify the SUTA state for the employee. This field is for informational purposes only.

Curr. Misc. Loc

Specify the current taxing locality in which the employee is being paid. This value is the default for generated time entry records. This value is associated with employer code type LCN and locality type 4, miscellaneous.

Curr. County

Type the current county in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 1, county.

Curr. City

Specify the current city in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 2, city.

Curr. Sch. Dist

Specify the current school district locality in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 3, school district.

Home Tax Co

For multi-tax processing only, to associate this employee with a federal tax company that is different from the tax company specified on the payroll master record, specify the tax company code value here. Leave blank if the employee is hired under the default tax company.

Payroll Cycle

Specify the payroll cycle to be used to pay the employee. This payroll cycle code is used to update the *Payroll Cycle* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify a *Payroll Cycle* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee's payroll data record.

AutoPay Group

Specify the autopay group to use to generate income records for the employee in payroll. This autopay group code is used to update the *AutoPay Group* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify an *AutoPay Group* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee's payroll data record.

Next Review

Specify the code value that identifies the next type of appraisal or performance review the employee is scheduled to receive. Use code type RTP in *Update Employer Codes* to define code values for this field.

If you are typing a current transaction, the system updates the *Next Review* field in the employee's basic data record with this code value when you complete the Performance Review transaction. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

Next Review Date

Specify the date on which the employee is next scheduled to receive a performance review.

If you are typing a current transaction, the system updates the *Next Review Date* field in the employee's basic data record with this date. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

3 Press Enter to exit to the Personnel Trans. More Info Window and save your information.

4 Press Enter to exit to the Personnel Action Update screen and save your information.

5 Enter another PE action or press F3 to exit to the HR main menu.

6 Press Enter to exit to the Personnel Actions Update screen and save your information.

7 Press F3 to exit to the main menu.

Entering a Termination Transaction

You use this option to terminate employees. When you enter a termination transaction in the *Enter Personnel Actions* function, the system can also automatically updates the *Cancellation Date* field on the employee's benefit enrollment records if you use the auto cancel feature in the Infinium HR *Benefits Administration* function or in Infinium FB. See the *Infinium Guide to Setup and Processing for Benefits Administration* or *Infinium FB Guide to Setup and Processing* for details.

1 From the *Enter Personnel Actions* prompt screen, select the **TE** transaction and press Enter. The system displays the screen shown in Figure 14-15.

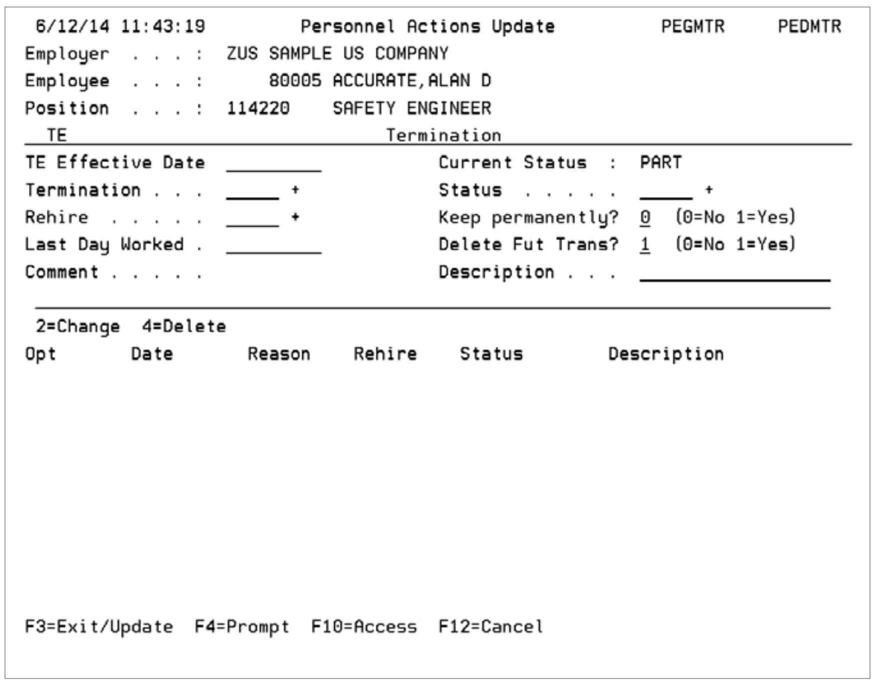


Figure 14-15: Personnel Actions Update Termination screen

2 Use the following information to fill in the fields on this screen:

The system does not remove an employee's records from your Infinium HR database when he or she is terminated. It simply updates the *Termination, Termination Date, Rehire* and *Last Day Worked* fields in the employee's basic data record so that the system recognizes the employee as terminated. All of the employee's Infinium HR and Infinium PY records remain intact on the system so that they can be updated if you rehire the employee.

The termination transaction also creates a record in the employee's history.

You use the *Purge Terminated Employees* function to remove a terminated employee's records from your Infinium HR database. See the "Changing Employee Data" chapter for details on how to purge terminated employees.

The system generally excludes terminated employees from processing when you use mass updates and print standard reports in Infinium HR and Infinium PY. However, some report and mass update selection screens allow you to include terminated employees.

Infinium PY does not include terminated employees in payroll cycle processing unless you or one of the payroll users type **1** in the *Pay After Term* field in the terminated employee's payroll data record. The payroll processor can always manually include a terminated employee in his or her assigned pay cycle, but the *Pay After Term* field allows the system to automatically include the employee during the begin stage of the payroll cycle processing. This field is useful for managing terminated employees that are eligible for severance pay for a length of time after their termination date.

When you prompt on the *Employee* or *Last Name* fields on Infinium HR selection screens, the system displays the names of terminated employees as lowlighted on monochrome monitors or in green on color monitors. When you access the terminated employee's records, the system displays a message box in the upper portion of the screen indicating the employee is terminated along with his or her termination date.

You must type information in the *TE Effective Date, Termination, Status* and *Rehire* fields.

Displaying and Printing Termination Information

You can use the *Display Employee History* function to review an employee's termination transaction. You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels, List PE Actions by Employee, List Terminations - Detail,* and *List Terminations - Summary* reports to print termination transaction information.

TE Effective Date

Type the employee's termination date. If you type a date that is the same as or earlier than the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data record with the termination transaction information as soon as you press Enter to save the transaction in the sub-file, and then press F3 to exit from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's records until you execute the *Mass Update Personnel Actions* function.

Current Status

The system displays the code value in the employee's *Status* field in the basic data record in this field.

Termination

Type the code value that identifies the reason the employee is terminating his employment. You use code type **TRM** to define code values for this field. Press F4 to display a list of valid values.

When you exit from the termination transaction screen, the system uses this field to update the *Termination* field on the fifth screen in the employee's basic data record. The system uses this field to determine if the employee is active or terminated within the specified employer.

Status

Type the code value that identifies the status you want to update in the employee's basic data record. The system displays the value you type in the *Status* field on the employee's basic data record. You use code type **STS** to define code values for this field.

When you exit from this transaction screen, the system uses this field to update the *Status, Previous Status* and *Status Chg Date* fields on the second screen in the employee's basic data record. The system does not use the *Status* field to determine if the employee is active or terminated within the specified employer.

Rehire

Type the code value that indicates if the employee is eligible to be rehired for this employer. You use code type **REC** to define code values for this field. Press F4 to display a list of valid values. This code is informational only and does not prevent you from using the rehire transaction to reactivate the employee's records on Infinium HR.

Keep Permanently?

Use this field to indicate if the employee's records should be purged when you execute the *Purge Terminated Employees* function. The *Purge Terminated Employees* function removes all of the employee's information except a brief skeletal record that includes key information such as the terminated employee's name, employee number, address, tax identification number, dates of hire and termination and termination reason code. See the "Changing Employee Data" chapter for details.

Valid values for this field are:

0 No, allow the employee’s records to be purged.

1 Yes, do not allow the employee’s records to be purged.

Last Day Worked

Type the date this employee last worked for the employer.

When you exit this screen after performing a termination, the system uses the date in this field to update the *Last Day Worked* field on the employee's basic data record.

Delete Future Trans

Type a value in this field to indicate how you want the system to process the deletion of a terminated employee’s future-dated personnel transactions. If you typed a value of **0** or **1** in the *Delete Future Trans* field on the Employer Update screen, that value is displayed in this field. You can override this value.

Valid values are:

0 Do not delete future-dated personnel transactions.

1 Delete future-dated personnel transactions.

Description

You can use this field to type any additional information about the termination transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the termination transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Termination screen.

If you typed a future date in the *TE Effective Date* field, the system highlights the transaction and displays the following message:

***Unprocessed transaction - employee basic data will not be updated.**

The system processes this transaction and updates the employee’s basic data record with the new information when you execute the *Mass Update*

Personnel Actions function and specify an *As Of Date* for the Mass Update that is the same as or after the effective date of the termination transaction.

4 Press F3 to exit from this screen and store the termination transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

If the date you entered in the *TE Effective Date* field is the same as or prior to the system date, the system automatically deactivates the employee's record by updating the *Termination, Termination Date* and *Rehire* fields in the employee's basic data record with information from the termination transaction.

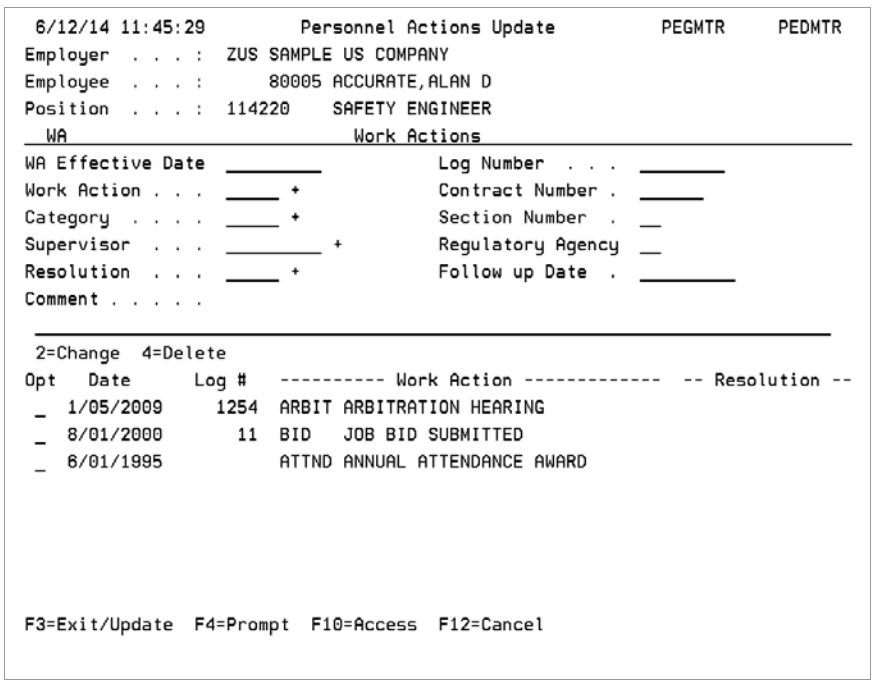
If you entered a new code value in the employee's *Status* field on the termination transaction screen, the system uses the new status code value and the employee's termination date to update the *Status, Previous Status* and *Status Chg Date* fields in his or her basic data record.

Entering a Work Action

You use the work actions transaction to track miscellaneous employment events for the employee including service awards, grievances, arbitrations, disciplinary actions and so on. You can record the effective date and work action code along with other optional details.

You use the work actions transaction for informational and historical purposes only. It does not update any information in the employee's basic data record.

1 From the *Enter Personnel Actions* prompt screen, select the **WA** transaction and press Enter. The system displays the screen shown in Figure 14-16.



```
 6/12/14 11:45:29        Personnel Actions Update         PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80005 ACCURATE,ALAN D
Position  . . . :  114220    SAFETY ENGINEER
  WA                            Work Actions
WA Effective Date  _________            Log Number  . . .  ________
Work Action . . .  _____ +              Contract Number .  ______
Category  . . . .  _____ +              Section Number  .  __
Supervisor  . . .  _________ +          Regulatory Agency  __
Resolution  . . .  _____ +              Follow up Date  .  _________
Comment . . . . .

 2=Change  4=Delete
Opt   Date      Log #   ---------- Work Action -------------  -- Resolution --
 _  1/05/2009     1254  ARBIT ARBITRATION HEARING
 _  8/01/2000       11  BID   JOB BID SUBMITTED
 _  6/01/1995           ATTND ANNUAL ATTENDANCE AWARD




F3=Exit/Update  F4=Prompt  F10=Access  F12=Cancel
```

Figure 14-16: Personnel Actions Update Work Actions screen

2 Use the following information to fill in the fields on this screen:

The *WA Effective Date* and *Work Actions* fields are required.

Displaying and Printing Work Action Information

The work action transactions create a history of the employee's miscellaneous employment events and incidents over time. You can use the

Display Employee History function to review an employee's work action transactions. You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels* and *List PE Actions by Employee* reports to print work action transaction information.

The following information describes the fields on the left-hand side of the Work Actions screen first, since these are the most commonly used fields. The fields on the right-hand side are optional and generally used only in union environments.

WA Effective Date

Type the effective date of the employment event you are recording for the employee. The system does not currently support future-dated processing for this transaction.

Work Action

Type the code value that identifies the type of event you are recording. You use code type **GRV** to define code values for this field. Press F4 to display a list of valid values.

Category

Type the code value that further identifies the type of event you are recording. You use code type **GTV** to define code values for this field. Press F4 to display a list of valid values.

You can coordinate the code values you define for code types **GRV** and **GTV**. For example, you define the code value **SVCAW** for code type **GRV** to represent a service award; you then define the code values **5YR** and **10YR** in code type **GTV** to further identify the type of service award given the employee.

Supervisor

Type the employee number of the person who presents the employee with an award, responds to a grievance or arbitration, is responsible for disciplinary actions, and so on. Press F4 to display a list of employees in the specified employer.

Resolution

Type the code value that indicates how the work action is resolved, if applicable. You use code type **RES** to define code values for this field. Press F4 to display a list of valid values.

For example, if you use the work actions transaction to record a grievance, you can use this field to record the way it is resolved.

Comment

You can use this field to type any additional information about the work actions transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Log Number

Type the grievance or arbitration log number of the incident you are recording. This is a 7-character free-form field that does not require pre-defined values.

Contract Number

Type the collective bargaining agreement contract number applicable to the employee whose grievance, arbitration or other work incident you are recording. This is a 6-character free-form field that does not require pre-defined values.

Section Number

Type the section or paragraph number within the collective bargaining agreement contract number applicable to the employee whose grievance, arbitration or other work incident you are recording. This is a 2-character free-form field that does not require pre-defined values.

Regulatory Agency

Type a code that identifies the government or other regulatory agency that is relevant to the work incident you are recording. This is a 2-character free-form field that does not require pre-defined values.

Follow up Date

Type the date that the supervisor or agency followed up on or resolved the work incident described above.

3. Press Enter to store this transaction in the sub-file of the Work Actions screen.

4. Press F3 to exit from this screen and store the work actions transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen.

Entering a Personal Change Transaction

You use this function to record any changes to the employee’s name, address, home telephone number, marital status, or spouse name. The system creates a history of personal changes made and updates the employee’s basic data and personnel data records with the new information.

If you do not want to store the employee’s prior personal information in history, you can update these fields directly in the employee’s basic data or personnel data records.

After you make a change to a field, ensure that the field contains complete information. For example, if the employee’s current street address is 3 Harbor Road and his or her new street address is 18 Harbor Road, you should type **18 Harbor Road**, not just **18.**

1 From the *Enter Personnel Actions* prompt screen, select the **PC** transaction and press Enter. The system displays the screen shown in Figure 14-17.

```
 6/12/14 11:47:58        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80005 ACCURATE,ALAN D
Position  . . . :  114220    SAFETY ENGINEER
  PC                         Personal Changes
PC Effective Date  _________           Name Title  . . .  ____
Last Name . . . .  __________________  Middle Name . . .  _______________
First Name  . . .  __________________  Middle Initial  .  _
Address . . . . .  ______________________________ Suffix  ____
(Line 2)  . . . .  ______________________________ Chg L2  0  0=No, 1=Yes
City/Town . . . .  ______________________________
State/Province  .  ___ +               Postal Code . . .  __________
Country . . . . .  ___ +               County  . . . . .  _____ +
Marital Status  .  _                   Home Tel. No. . .  ___________________
Spouse Name . . .  _______________________________________
Comment . . . . .                      Description . . .  ________________
 ____________________________________________________________________________
 2=Change  4=Delete
Opt  Date     Name Change
 _  6/19/2012
Address: 1500 CAPE WAY LANE, APT. 123   Mar. Sts:     Tel: 1-(508)-778-1233222
         HYANNIS                        MA  02601      County: RIVER         +
F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-17: Personnel Actions Update Personal Changes screen

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

The system keeps all of the personal information that you maintain with this transaction on the first screen of the employee’s basic data record except for the *Marital Status* and *Spouse Name* fields, which are stored in the employee’s personnel data record.

When you make changes to the employee’s name or address, the system displays the employee’s prior name and/or address information in the Previous Information section of the employee’s personnel data record. See the table beginning on page 14-5 for details.

After you change the employee’s last name, you can display his or her previous name and new name on the Employee Locate screen. To display the Employee Locate screen, press F4 on the *Employee* or *Last Name* fields on any selection screen. Press F9 on the Employee Locate screen to display the employee’s current and previous names. See the “Displaying Employee Data” chapter for further information on how to use the Employee Locate screen.

The *PC Effective Date* field is required.

Displaying and Printing Personal Change Information

The personal change transaction creates a history of an employee’s name, address and marital changes. You can use the *Display Employee History* function to review an employee’s personal change transactions. You can use the *List PE Actions, List PE Action Details, List PE Actions by Levels* and *List PE Actions by Employee* reports to print personal change transaction information.

PC Effective Date

Type the date on which the employee’s name, address or spouse information changes. If you type a date that is the same as prior to the system date displayed in the upper left-hand corner of the screen, the system updates the employee’s basic data or personnel data record with the personal change transaction information as soon as you press Enter, and then F3 from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee’s records until you execute the *Mass Update Personnel Actions* function.

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.

Last Name

Type the employee’s new last name. This is an 18-character free-form field that does not require pre-defined values.

Middle Name

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.

First Name

Type the employee’s new first name. This is an 18-character free-form field that does not require pre-defined values.

Middle Initial

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

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.

Address

Type the employee’s new street address. This is a 30-character free-form field that does not require pre-defined values.

(Line 2)

Type the second line of the employee’s new street address. This is a 30-character free-form field that does not require pre-defined values.

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.

Chg

Use this field to indicate if the system should remove information from the *Line 2* field in the employee’s basic data record. The system removes the existing information when you leave the *Line 2* field in the personal change transaction blank, and then type **1** in the *Chg* field. The default value for this field is **0**.

Valid values for this field are:

1	Update the *Line 2* field in basic data, even if the *Line 2* field in the personal change transaction is blank.
0	Update the *Line 2* field in basic data only if the *Line 2* field in the personal change transaction is not blank.

City/Town

Type the name of the employee's new city of residence. This is a 30-character free-form field that does not require pre-defined values.

State/Province

Type the code value that identifies the employee's new resident state or province. You use code type **STA** to define code values for this field. Press F4 to display a list of valid values. When you type a new code in this field, the system updates the *State/Province* field in the basic data record. If appropriate, you must manually update the *Home State* field in the employee's payroll data record.

Postal Code

Type the name of the employee's new postal or ZIP code. This is a 10-character free-form field that does not require pre-defined values.

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

Type the code value that identifies the employee's new residence country. You use code type **CTR** to define code values for this field. Press F4 to display a list of valid values. When you type a new code in this field, the system updates the *Country* field in the basic data record. If appropriate, you must manually update the *Country* field in the employee's payroll data record.

County

Type the code value that identifies the employee's new residence county. You use code type **CNT** to define code values for this field. Press F4 to display a list of valid values.

Marital Status

Type the code that identifies the employee's new marital status. The system uses this information to update the *Marital Status* field in the basic data record. This field does not affect U.S. income tax calculations.

For U.S. employees, you or the payroll processor may need to also update the *Fed. Filing* field in the employee’s payroll data record and state tax filing status fields in the employee’s deduction data record.

Valid values are:

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

Home Tel. No.

Type the employee’s new home telephone number. This is a 19-character free-form field that does not require pre-defined values.

Spouse Name

Type the name of the employee’s new spouse. This is a 39-character free-form field that does not require pre-defined values.

Description

In this field you can type any additional information about the personal change transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

In this field you can type any additional information about the personal change transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the personal change screen.

If you typed a future date in the *PC Effective Date* field, the system highlights the transaction and displays the following message:

***Unprocessed transaction - employee basic data will not be updated.**

The system processes this transaction and updates the employee’s basic data and personnel data records with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the Mass Update that is the same as or after the effective date of the personal change transaction.

4 Press F3 to exit from this screen and store the personal change transaction in the employee’s history. The system does not keep the transaction if you press F12 to exit from this screen.

If the date you typed in the *PC Effective Date* field is the same as or prior to the system date, the system automatically updates the employee’s basic data and personnel data records with the new name, address or spousal information.

Entering or Updating Payroll Locality Information for Personal Change Transactions

When you are processing a personal change transaction, you can enter or update state, locality and user field information. Follow the steps below to enter this information.

1 On the Personnel Actions Update Hire screen, press F6. The system displays the Personnel Trans. More Info Window shown in Figure 14-18.

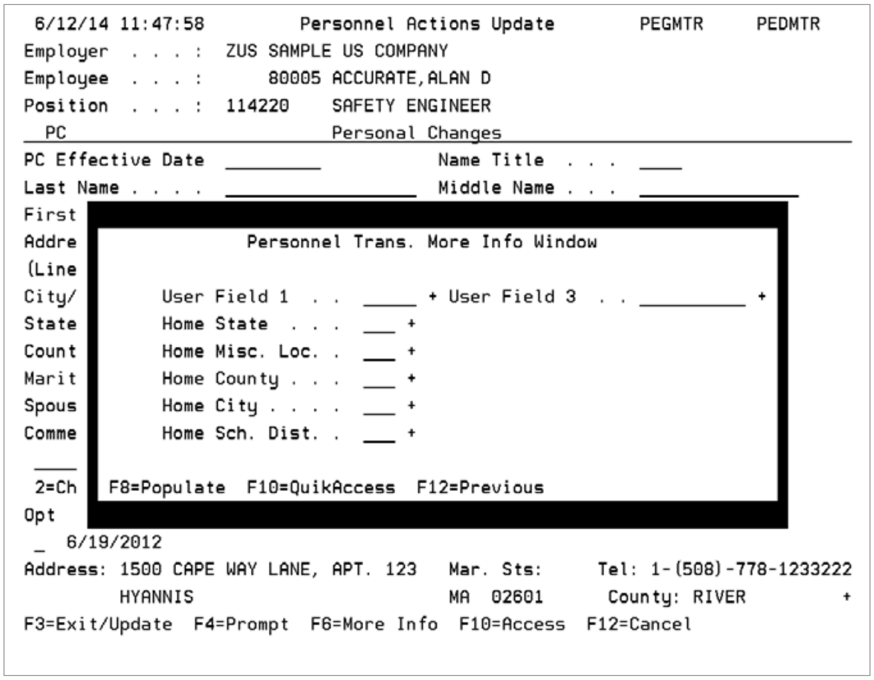


Figure 14-18: Personnel Trans. More Info Window

2 Use the information below to complete the fields in the Personnel Trans. More Info Window or press F8 to activate a custom program to populate the fields.

User Field 1

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

User Field 3

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

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.

Home Misc. Loc

If this employee is a resident of this locality, specify the home locality taxing locality for this employee. If this employee is not a resident of this locality, leave this field blank.

This value is used to determine resident status and rates for locality taxes. If this employee is a resident of this locality, specify the miscellaneous locality for this employee. If this employee is not a resident of this locality, leave this field blank.

Home County

If this employee is a resident of this county, specify the home county taxing locality for this employee. If this employee is not a resident of this locality, leave this field blank.

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

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, leave this field blank.

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

Home Sch. 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, leave this field blank.

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

3. Press Enter to exit to the Personnel Trans. More Info Window and save your information.

4. Press Enter to exit to the Personnel Action Update screen and save your information.

5. Enter another PE action or press F3 to exit to the HR main menu.

6. Press Enter to exit to the Personnel Actions Update screen and save your information.

7. Press F3 to exit to the main menu.

Entering a Demotion Transaction

You use the demotion transaction to move the employee from one position to another position of lesser rank or status within the same employer. The system updates the employee’s basic data record with new position, job and level information, along with other related information that defaults from the new job control or position control records.

The system keeps the employee’s previous position assignment in his or her on-line history for use in employee history displays and reports.

1 From the *Enter Personnel Actions* prompt screen, select the **DM** transaction and press Enter. The system displays the screen shown in Figure 14-19.

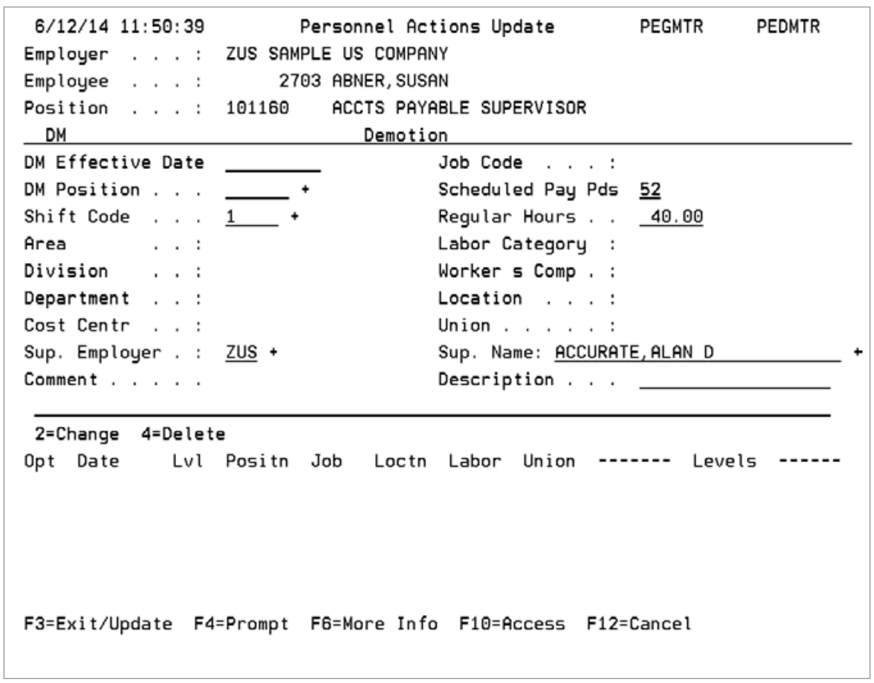


Figure 14-19: Personnel Actions Update Demotion screen

2 Use the following information to fill in the fields on this screen:

You can update many fields in the employee’s basic data record when you type a demotion transaction. See the table beginning on page 14-5 for a comprehensive list of the affected fields.

The most significant fields that you update are the *Level*, *Position, Position Title* and *Job Code* fields. The fields that the system updates vary from one demotion transaction to another, depending on the differences between the employee's old and new position controls. See the *Infinium HR Guide to Controls* for details on how to establish these control records.

For example, if you demote the employee from a secretary position in the accounting department to a receptionist position in the sales department, you may update many fields that default from the employee's position assignment including one or more of the *Level* fields, the *Position* field and the *Position Title* fields, along with fields that typically default from the job control such as the *EEO Code, EEO-4 Function, Security Group* and *Seniority Date*.

Updating Payroll Data

When you enter a demotion transaction, you can affect payroll processing if the new position contains level, job or payroll authorization group values that differ from the employee's previous position.

The system can use the level and job values during payroll cycle processing to generate labor expense account numbers; later, the system can use these fields to generate general ledger numbers for employer liabilities and employee deductions.

When you enter a demotion transaction, the system also updates the annual wage base in the payroll master file, PYPMS, if you change an hourly employee's regular hours. Changing the value in the *Scheduled Pay Periods* field on the Personnel Actions Update screen does not affect the annual wage base.

Reviewing the Audit Report

If Infinium HR users are authorized to update the value in the *PY Auth Group* field in the employee's payroll data record, the system also automatically updates employee income and deduction authorizations. Infinium HR and Infinium PY users should carefully review the audit report of the changes the system makes to employee income and deduction authorizations when the payroll authorization group value changes. The system generates the report using interactive processing and assigns printer file name **PYTMBGAU**. You can access this report from the Work with All Spooled Files screen.

You must type information in the *DM Effective Date* and *DM Position* fields.

Displaying and Printing Demotion Information

The promotion, demotion, transfer and rehire transactions create a history of the positions held by employees in your organization. You can use the *Display Employee History* function to review an employee's promotion transactions. You can use the *List PE Actions, List PE Action Details, List PE*

Actions by Levels, List PE Actions by Employee and *List Transfer/Promotion/Demotion* reports to print demotion transaction information.

Sequence for Entering Demotion Transactions

When an employee receives a demotion and a corresponding salary change, you should type the demotion transaction first. If the employee's salary range changes as a result of the position change, the system uses the new salary range in the salary change transaction to compute the employee's *Salary Quartile* and *Comp Ratio* fields.

In addition, the system stores the new salary range with the employee's demotion salary change transaction which provides more accurate information for historical purposes.

If an employee is transferred to another employer and within that employer is being demoted to a different position, you must type the transfer transaction first to move the employee to the new employer. After you transfer the employee, you can type the demotion transaction in the new employer.

DM Effective Date

Type the effective date of the employee's demotion. If you type a date that is the same as or prior to the system date displayed in the upper left-hand corner of the screen, the system updates the employee's basic data record with the demotion transaction information as soon as you press Enter to store the transaction in the sub-file, and then press F3 to exit from this screen.

If you type a date that is in the future of the system date, the system treats the transaction as pending and does not update the employee's basic data record until you execute the *Mass Update Personnel Actions* function.

DM Position

Type the code that identifies the new position to which the employee is being demoted. Press F4 to display a list of positions within the employee's current employer. The system uses information on the position control records to display each position's authorized headcount, current staffing levels and openings. You can type any character in the *Opt* field next to the employee's new position and press Enter to automatically fill the *DM Position* field.

When you select a position from the F4 display, the system automatically updates the *Job Code, Shift Code, Level, Labor Category, Worker's Comp, Location* and *Union* fields on the Demotion screen with information from the new position control record.

Scheduled Pay Pds

The system defaults information into this field based on the *Scheduled Pay Pds* field in the employee's basic data record. This field indicates the number of pay periods per year in which the employee is expected to be paid. You can update this information if necessary.

Regular Hours

The system defaults information into this field based on the *Regular Hours* field in the employee's basic data record. This field indicates the number of hours per pay period that the employee is expected to work. You can update this information if necessary.

Shift Code

The system defaults information into this field based on the *Shift* field in the employee's basic data record. The system uses the Shift code to compute shift or other premiums during payroll cycle processing. You can update this code value if necessary. You define values for this field using code type **SFT**.

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.

Description

You can use this field to type any additional information about the demotion transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the demotion transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

3 Press Enter to store this transaction in the sub-file of the Demotion screen. The system updates the input-inhibited fields on this screen including the *Levels, Labor Category, Worker's Comp, Location* and *Union* fields, depending on the information in the employee's new position control record.

The system performs one or more of the following:

- If you entered a future date in the *DM Effective Date* field, the system highlights the transaction and displays the following message:

  ***Unprocessed transaction - employee basic data will not be updated.**

- The system processes this transaction and updates the employee's basic data and personnel data records with the new information when you execute the *Mass Update Personnel Actions* function and specify an *As Of Date* for the Mass Update that is the same as or after the effective date of the demotion transaction.
- If you selected a demotion position that has no openings, the system displays the following warning message in a confirmation window:

  WARNING: Authorized workforce level exceeded. This entry will cause the authorized workforce level to be exceeded for this position (as of the date specified). You may override this error. Press ENTER to accept the error or CANCEL to return.

Perform one of the following actions to remove the warning box from the screen:

- Press Enter to move the employee to the new position, even though by doing so you exceed the authorized headcount for this position.
- Press F12 to return to the Demotion screen so that you can select a different position.

If you select a demotion position that has been defined as a single position, the system displays the following warning message in a confirmation window:

WARNING: Position has already been assigned. The position to which you wish to hire, transfer, or promote an employee already has an employee assigned to it. If you wish to replace this EE number with that of the employee you are entering, you may do so by overriding this error. Press ENTER to accept the error or CANCEL to return.

Perform one of the following actions to remove the warning box from the screen:

- Press Enter to move the employee to the new position, even though by doing this you cause two employees to be assigned to a position that has been defined as a single incumbent position on the position control record.
- Press F12 to return to the Demotion screen so that you can select a different position.

4 Press F3 to exit from this screen and store this demotion transaction in the employee's history. The system does not keep the transaction if you press F12 to exit from this screen. The system performs the following actions:

- If the date you typed in the *DM Effective Date* field is the same as or earlier than the system date, the system automatically updates the *Position, Position Title* and other fields as needed in the employee's basic data record.
- If as a result of the demotion transaction the employee should be assigned to a new payroll authorization group and Infinium HR users are allowed to update this information, the system automatically updates the value in the *PY Auth Group* field in the employee payroll data record.

It also updates the employee's income and deduction authorizations and generates the Payroll Authorization Group Changes to Income and Deductions audit report. Access the Work with All Spooled Files screen and locate printer file **PYTMBGAU** to review or print this report.

Entering or Updating Payroll Locality Information for Demotion Transactions

When you are processing a demotion transaction, you can enter or update state, locality and home tax company information. Follow the steps below to enter this information.

1 On the Personnel Actions Update Demotion screen, press F6. The system displays the Personnel Trans. More Info Window shown in Figure 14-20.

```
 6/12/14 11:50:39         Personnel Actions Update        PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
Position  . . . :  101160    ACCTS PAYABLE SUPERVISOR
  DM                            Demotion
DM Effective Date  _________            Job Code  . . . :
DM Position . . .  ______ +             Scheduled Pay Pds  52
Shift
Area              Personnel Trans. More Info Window
Divis       Current State . .  ___ + Payroll Cycle . .  _____ +
Depar       SUTA State  . . .  ___ + AutoPay Group . .  _____ +
Cost        Curr. Misc. Loc .  ___ + Next Review . . .  _____ +
Sup.        Curr. County  . .  ___ + Next Review Date.  ________           +
Comme       Curr. City  . . .  ___ +
 ____       Curr. Sch. Dist .  ___ +
 2=Ch       Home Tax Co . . .  _____ +
Opt                                                             ------
        F8=Populate  F10=QuikAccess  F12=Previous


F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 14-20: Personnel Trans. More Info Window

2 Use the information below to complete the fields in the Personnel Trans. More Info Window or press F8 to activate a custom program to populate the fields.

Current State

Specify the state code where the employee is currently assigned and is being paid. This state is the default state for all earnings generated by the system.

SUTA State

Specify the SUTA state for the employee. This field is for informational purposes only.

Curr. Misc. Loc

Specify the current taxing locality in which the employee is being paid. This value is the default for generated time entry records. This value is associated with employer code type LCN and locality type 4, miscellaneous.

Curr. County

Type the current county in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 1, county.

Curr. City

Specify the current city in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 2, city.

Curr. Sch. Dist

Specify the current school district locality in which the employee is being paid. This value is used as a default for generated time entry records. This value is associated with employer code type LCN and locality type 3, school district.

Home Tax Co

For multi-tax processing only, to associate this employee with a federal tax company that is different from the tax company specified on the payroll master record, specify the tax company code here. Leave blank if the employee is hired under the default tax company.

Payroll Cycle

Specify the payroll cycle to be used to pay the employee. This payroll cycle code is used to update the *Payroll Cycle* field in the employee’s payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify a *Payroll Cycle* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee’s payroll data record.

AutoPay Group

Specify the autopay group to use to generate income records for the employee in payroll. This autopay group code is used to update the *AutoPay Group* field in the employee's payroll data.

The system enters a default value in this field when you set the *Position Defaults* field in the *Update Employer Controls* function to **1** and you specify an *AutoPay Group* value in the *Update Position Defaults* function.

When you create a transaction, if the *Position Defaults* field is set to **1** in the *Update Employer Controls* function, then the value from the position defaults record for the entered position is used as the default value for this field and is used to update the corresponding field in the employee’s payroll data record.

Next Review

Specify the code value that identifies the next type of appraisal or performance review the employee is scheduled to receive. Use code type RTP in *Update Employer Codes* to define code values for this field.

If you are typing a current transaction, the system updates the *Next Review* field in the employee's basic data record with this code value when you complete the Performance Review transaction. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

Next Review Date

Specify the date on which the employee is next scheduled to receive a performance review.

If you are typing a current transaction, the system updates the *Next Review Date* field in the employee's basic data record with this date. If you are typing a future-dated transaction, use the *Mass Update Personnel Actions* function to update this field on or after the specified date.

3 Press Enter to exit to the Personnel Trans. More Info Window and save your information.

4 Press Enter to exit to the Personnel Action Update screen and save your information.

5 Enter another PE action or press F3 to exit to the HR main menu.

6 Press Enter to exit to the Personnel Actions Update screen and save your information.

7 Press F3 to exit to the main menu.

Chapter 15 Using Additional Personnel Action Functions

15

This chapter describes various ways you can work with personnel actions.

The chapter consists of the following topics:

Overview of Additional Personnel Actions Functions

In the “Entering Personnel Actions” chapter, you became familiar with fundamental information about how to use personnel action transactions to keep the employee’s records in Infinium HR current. This chapter provides you with information on the following additional features related to personnel actions.

If you make a mistake when you enter a personnel action transaction, you can access the transaction and make corrections to it. With some exceptions, the system updates the employee’s records with the changed information. If necessary, you can delete certain transactions; however, for other transactions you must make a correcting entry.

When you enter personnel actions with an effective date after the input date, the system holds these transactions in a pending future-dated status. You must use the *Mass Update Personnel Actions* function to activate these future-dated transactions and update the employee’s records with the new information.

You can establish performance review controls to assist you when you use the performance review transaction. The system uses the controls to determine what type of performance review the employee should receive next, and calculates the date of his or her next performance review.

You can associate custom programs with personnel action user exits to have the system perform extra steps or updates based on your unique business needs.

Working with Personnel Actions

In the “Entering Personnel Actions” you became familiar with how to use the twelve personnel action transactions to update information in the employee’s basic data, personnel data and payroll data records and create employment history for the employee. The system compares the personnel action transaction’s effective date to the date you enter into Infinium HR to determine if the employee’s records should be updated immediately or if the transaction should be held until a future date.

Entering Current Transactions

When you enter a personnel action transaction with an effective date that is the same as or prior to the entry date, the system updates the employee’s records as soon as you exit from the transaction screen.

For example, if on August 1, 1995 you enter a status change transaction with an effective date of July 30, 1995, the system immediately updates the employee’s basic data record with the new status information when you press F3 to exit from the Status Change screen. In this chapter, this type of personnel action is referred to as a current transaction or a processed transaction.

Entering Future-Dated Transactions

If you type a personnel action transaction with an effective date that is in the future of the system date when you are entering the data, the system does not update the employee’s basic data, personnel data or payroll data records until you process the *Mass Update Personnel Actions* function. This type of personnel action is referred to as a future-dated transaction.

A future-dated transaction is a pending transaction until it has been activated by the *Mass Update Personnel Actions* function. After the pending transaction has been activated, it is no longer considered a future-dated transaction; it becomes a processed transaction.

For example, if on July 1, 1995, you enter a salary change transaction with an effective date of August 5, 1995, the system recognizes this as a future-dated transaction and holds it in suspense until you execute the *Mass*

Update Personnel Actions function and specify an *As Of* date of August 1, 1995 or later.

The system uses future-dated processing for the following personnel action transactions:

RE	Performance Review
SC	Salary Change
PR	Promotion
TR	Transfer
ST	Status Change
RH	Rehire
TE	Termination
PC	Personal Change
DM	Demotion

You can easily make changes to a future-dated personnel action transaction before you use the *Mass Update Personnel Actions* function to activate it. If the personnel action was not future-dated and the system has already updated the employee's basic data, personnel data or payroll data records with the original transaction information, you can make changes later to the original transaction for historical purposes, but the system may not use the changed information to update the employee's basic data, personnel data and payroll data. The circumstances under which the system does not use the changed information are noted below.

Entering Multiple Same-Type Transactions

If you have entered more than one transaction of the same type for an employee, such as two salary change transactions, you can make changes to the older transaction(s) but the changes are not used by the system to update the employee's basic data, personnel data or payroll data records. The system displays information from the most current transaction in the employee's basic data, personnel data and payroll data records.

For example, if you typed a salary change transaction effective June 1, 1994 that had an incorrect base pay rate, and then typed another salary change transaction effective June 1, 1995 before you caught the mistake, you can correct the 1994 transaction for historical purposes. However, the system does not update the employee's basic data and payroll data records with the changed information, since the subsequent 1995 transaction is still the most current information.

In the previous example, you must manually update the *Prev. Base Rate* field in the 1995 transaction to have the system recalculate the correct increase percent and increase amount for that transaction based on the changed 1994 base pay rate.

When you run the *Trial Mass Update PE Actions* and *Mass Update PE Actions* functions to process salary change transactions, the system prints a warning message on the reports if the previous base rate information stored on the salary change transaction does not match the previous rate information on the employee basic data record.

The system takes all four of the position movement transactions into consideration when you make changes to a position movement transaction that the system has already used to update employee basic data. The position movement transactions are:

- Transfer
- Promotion
- Demotion
- Rehire

For example, you use the transfer transaction to move an employee to an accounting clerk position effective May 1, 1994 and later use the promotion transaction to move the employee to a payroll manager position effective June 1, 1995. If you make changes to the 1994 transfer transaction after June 1, 1995, the system does not update the employee's basic data or personnel data records with the changes, since the 1995 promotion transaction reflects the employee's most current position assignment.

Changing Personnel Actions

You use the *Enter Personnel Actions* function to make changes to personnel action transactions, whether they are pending future-dated transactions or already processed transactions.

Follow these steps to access the *Enter Personnel Actions* function.

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

2 Select *Update Employee Data*.

3 Select *Enter Personnel Actions* [EPA]. The system displays the screen shown in Figure 15-1.

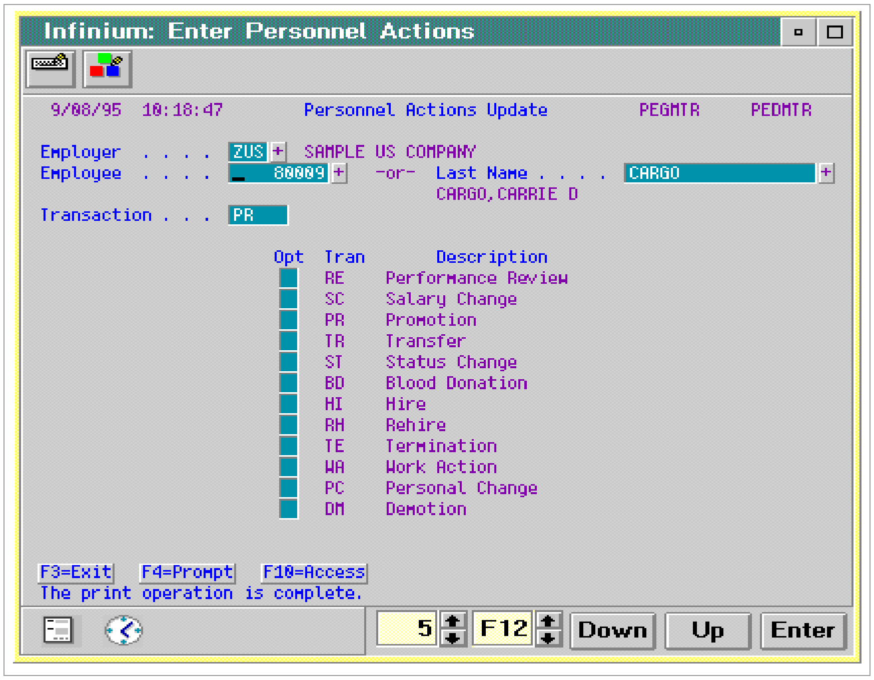


Figure 15-1: Personnel Actions Update prompt screen

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

You specify the employer, employee and personnel action transaction(s) you want to change for the employee on this screen. You can select more than one transaction for an employee.

You can type the two-character transaction code in the *Transaction* field, or you can type any character in the *Opt* column next to the transaction(s) you need to change for the employee.

Employer

Type the code that represents the employer to which the employee is assigned. Press F4 to display a list of valid employers.

Employee

Type the number assigned to the employee within his or her current employer. 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 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.

Transaction

Use this field to select a single personnel action transaction that you want to change for the specified employee. You can also use the *Opt* field below. If you want to change more than one transaction for the specified employee, you can use the *Opt* field below to select all of the required transactions at once.

Valid values are:

RE	Performance Review
SC	Salary Change
PR	Promotion
TR	Transfer
ST	Status Change
BD	Blood Donation
HI	Hire
RH	Rehire
TE	Termination
WA	Work Action
PC	Personal Change
DM	Demotion

5 Press Enter. The system displays the specified transaction screen, if you selected a single transaction, or the first of several transaction screens if you selected more than one pending transaction. The promotion transaction is used for this example. The system displays the screen shown in Figure 15-2.

```
 6/12/14 11:17:04         Personnel Actions Update        PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       2703 ABNER,SUSAN
Position  . . . :  101160    ACCTS PAYABLE SUPERVISOR
  PR                            Promotion
PR Effective Date  _________             Job Code  . . . :
PR Position . . .  ______ +              Scheduled Pay Pds  52
Shift Code  . . .  1____ +               Regular Hours . .  40.00
Area        . . :                        Labor Category  :
Division    . . :                        Worker s Comp . :
Department  . . :                        Location  . . . :
Cost Centr  . . :                        Union . . . . . :
Sup. Employer . :  ZUS +                 Sup. Name: ACCURATE,ALAN D            +
Comment . . . . .                        Description . . .  __________________

 2=Change  4=Delete
Opt  Date     Lvl  Positn  Job   Loctn  Labor  Union  -------  Levels  ------
 _  7/01/2013  00  100140 140    HQ                   200   ADMIN ACCT  103




F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 15-2: Promotion screen

6 Use the information below to make changes to a pending future-dated or previously processed personnel action transaction.

Pending Transactions

The system displays the pending future-dated transaction in the sub-file at the bottom of the screen. The pending future-dated transaction is the first line in the sub-file and is highlighted. If you have more than one pending future-dated transaction for the employee, they are shown in descending date order.

The system displays the following message at the bottom of the screen when there are pending future-dated performance review, salary change, promotion, transfer, status change, rehire, termination, personal change, and demotion transactions:

***Unprocessed transaction - employee basic data will not be updated.**

Processed Transactions

The system displays processed transactions in the sub-file at the bottom of the screen in descending date order. If the employee has more transactions than can be displayed on the transaction screen, press PgDn to scroll through additional sub-file screens.

Making Changes

To change a processed or pending future-dated transaction, type **2** in the *Opt* field next to the transaction. Press Enter. The system displays the processed or pending transaction in the top portion of the screen.

Make any necessary corrections to the information.

7 Press Enter to return the transaction to the sub-file of the screen. The system stores the corrected transaction in the sub-file of the screen.

8 Press F3 to exit from the screen.

Depending on the circumstances, the system performs one of the following actions:

- If the corrected transaction is a pending future-dated transaction, the system uses this corrected transaction to update the employee’s basic data, personnel data and payroll data records with the new information when you execute the *Mass Update Personnel Actions* function.
- If the corrected transaction has already been used by the system to update the employee’s basic data, personnel data or payroll data screens and there are no other like transactions for the employee with effective dates after that of the corrected transaction, the system updates the employee’s records with the new information.
- If the corrected transaction has been superseded by another like transaction for the employee with an effective date after the corrected transaction’s effective date, the system displays the following message in a confirmation window:

  WARNING: 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.

When you press Enter, the system does not update the employee’s Basic Data, Personnel Data or Payroll Data screens. The changed information is stored in the employee’s history file for displays and reports.

Deleting Personnel Actions

You can delete pending future-dated transactions before you execute the *Mass Update Personnel Actions* function. Since the system has not used these transactions to update the employee's records, the information in the employee's basic, personnel and payroll data records is not affected by the deletion.

However, you should use extreme caution when you delete transactions that the system has already used to update the employee's basic data, personnel data and payroll data. The system reverts to information from previous transactions when you delete four types of transactions, but does not do so when you delete five other transaction types.

Deleting Promotion, Demotion, Transfer, Performance Review, and Termination Transactions

When you delete processed transactions of the type listed below, the system uses information from a previous transaction to update the employee's basic data and personnel rata records.

- Promotion
- Demotion
- Transfer
- Performance Review
- Termination

For basic data to be updated correctly when you delete a performance review transaction, a previous performance review transaction must exist.

The position change transactions such as promotions, demotions, and transfers do not require a previous transaction as long as a previous position change (promotion, demotion, transfer), rehire, or hire transaction exists. The termination transaction needs no previous transactions to correct data if you delete a termination transaction.

For example, you delete an employee's most current promotion transaction, which had an effective date of September 1, 2003. The system uses information from the employee's most previous promotion, demotion, transfer, rehire, or hire transaction to correct position-dependent information in the employee's basic data record such as the levels, position and job assignment.

In this example, if the employee had a transfer transaction effective June 1, 2003 and another promotion transaction effective April 1, 2003, the system uses information from the June 1, 2003 transfer transaction to update the employee's position-related information in the basic data and personnel data records.

When you terminate an employee, you can use the automatic cancellation feature in Benefits Administration to enter cancellation dates on employee benefit enrollment records, or you can manually enter cancellation dates on employee enrollment records. If you later delete the termination transaction, you must manually remove the cancellation dates from the employee's benefit enrollment records. The system does not automatically remove the cancellation dates when you delete the termination transaction.

Change Transactions

The system does not make corrections to all the information in the employee's basic data, personnel data or payroll data records when you delete the following five transactions:

- Salary Change
- Status Change – Leave of Absence Changes
- Rehire
- Personal Change

If you entered any of the above transactions in error for an employee and saved your changes, deleting the transaction does not correct the information in the employee's records in all cases. You need to enter another adjusting transaction with an effective date after the erroneous transaction to correct the employee's records.

The system does make corrections to employee data when one of the following transactions is deleted:

- Status Change – Change in Status
- Termination – Change in Status

If you entered an erroneous transaction that changed the employee's status, deleting the erroneous transaction will reset the status, previous status, and status change date on the employee's basic data record to what was in place before the erroneous transaction was entered.

If you rehire an employee by mistake and enter new position and salary information on the rehire transaction screen, you should enter a salary change transaction to correct his or her pay information, and then enter a termination transaction to re-terminate the employee.

Deleting Work Action and Blood Donation Transactions

The work action and blood donation transactions do not update information in the employee’s basic data record; therefore, you can delete erroneous work action or blood donation transactions without impacting the integrity of other employee information.

Deleting the Hire Transaction

You should never delete the employee’s original hire transaction. This record is established by the system automatically when you use the *Enter New Hire* or *Update Employee Data* functions to hire a new employee. The system uses information in the hire transaction in employee history displays and reports and various other Infinium HR activities.

Summary: Deleting Personnel Action Transactions

After you delete any personnel action transactions, you should carefully review the information in the employee’s basic data, personnel data and payroll data records to ensure that all of the employee’s records reflect current, correct and consistent information.

The chart below summarizes the information in the preceding section about deleting personnel action transactions.

Personnel Action Transaction Type	Comments regarding Deletion of Processed Transactions
Promotion Transfer Demotion Termination	Deletion is allowed. If a transaction is deleted, system automatically uses prior transaction information to update the position-related fields in the employee's basic data and personnel data records. If you delete a previously processed termination transaction, you must manually remove the cancel dates from the employee's benefit enrollment records before you execute the *Mass Update Enrollments* function.
Performance Review Salary Change Status Change Rehire Personal Change	Deletion not recommended. Enter a correcting transaction to fix errors. If you delete a transaction, you must manually correct affected information in the employee's basic data, personnel data and payroll data records.
Blood Donation Work Action	Deletion is allowed. These transactions do not update information in the employee's basic data record.
Hire Transaction	Do not delete. The system uses this transaction for various Infinium HR functions and reports.

Use the following information to delete a pending future-dated transaction or a processed transaction:

1 Follow the steps in the preceding "Changing Personnel Actions" section to display the screen that contains the personnel action transaction to be deleted.

2 Type **4** in the *Opt* field next to the pending transaction, and then press Enter.

The system displays a window entitled Confirm Deletion of Record. Type **1** in the field next to the *Delete Record?* field to delete the pending transaction, and then press Enter.

The system replaces the pending transaction with the message ***DELETED**. After you exit from this screen, the system removes this message.

3 Press F3 to exit from the Personnel Action transaction screen. The system displays the Personnel Actions Update prompt screen.

Depending on which type of transaction you deleted, the system performs one of the following actions:

- For pending future-dated transactions, the system removes the transaction from the employee’s transaction screen. There is no effect on the employee’s basic, personnel or payroll data records since the transaction had not yet been processed by the *Mass Update Personnel Actions* function.
- For processed promotion, transfer or demotion transactions, the system uses information from the employee’s previous position-movement transaction to update position-related fields in his or her basic data and personnel data records.

  You should carefully review fields updated by these transactions in the employee’s basic data record and the previous information section of the personnel data record to ensure that all of the information is correct. See the “Entering Personnel Actions” chapter for details on which fields are updated by each transaction.
- For terminations, the system removes the termination information from the employee’s basic data record and the Employee Locate screen. If you use the auto cancel feature in Benefits Administration or manually enter cancel dates in the employee’s benefit enrollment records, you must manually remove the cancel dates from the employee’s benefit enrollment records before you process the *Mass Update Enrollments* function.
- For performance review, salary change, status change, rehire and personal change transactions, the system deletes the transaction record but does not make corrections to the information in the employee’s basic, personnel or payroll records. You must manually make corrections to those fields in his or her records that are updated by these transactions. See the “Entering Personnel Actions” chapter for details on which fields are updated by each transaction.

Processing Future-Dated Transactions

The “Entering Personnel Actions” chapter provides you with basic information on how to enter personnel actions. When you enter a personnel action transaction with an effective date that is in the future of the date when you are entering the transaction, the system marks the transaction as future-dated.

The system does not update the employee’s basic, personnel or payroll data records with the future-dated transaction information until you use the *Mass Update PE Actions* function to process the pending transaction. If you never use the *Mass Update PE Actions* function, the system never processes these pending future-dated transactions.

The system uses future-dated processing for the following types of personnel action transactions:

- Demotions
- Performance Reviews
- Personal Changes
- Promotions
- Salary Changes
- Status Changes
- Rehires
- Terminations
- Transfers

The system does not use future-dated processing for the work action or blood donation transactions and it does not use future-dated processing when you use the *Enter New Hire* or *Update Employee Data* functions to enter a new employee’s hiring information into Infinium HR in advance of his or her hire date.

However, if you make changes to the hire transaction screen in the *Enter Personnel Actions* function immediately after you complete the new hire function for an employee whose hire date is in the future of the date when you entered his or her hire transaction, the system uses *Mass Update PE Actions* to update the employee’s basic data record with the changed information.

The system uses information on the transactions it processes during the *Mass Update PE Actions* to update fields in the employee's basic, personnel and payroll data records. It flags the pending transactions as processed and also creates a history record of the employee's previous information.

You can use the *Trial Mass Update PE Actions* function to verify in advance which transactions the system will process when you use the *Mass Update PE Actions*.

You use the *As of Date* field on the selection screen for the *Trial* and *Mass Update PE Actions* functions to specify which transactions the system should process. The system compares the *As of Date* you enter on the selection screen to the effective date of all pending future-dated transactions. It processes those transactions whose effective date is the same as or earlier than the *As of Date*.

For example, if on June 1, 1995 you type a termination transaction with an effective date of July 1, 1995, the system flags this transaction as a future-dated transaction. It does not process this transaction and update the employee's basic data record with the termination information until you run the *Mass Update PE Actions* function with an *As of Date* of July 1, 1995 or later.

If you specify an *As of Date* of July 15, 1995, the system processes all pending transactions with effective dates equal to or prior to July 15, 1995. Transactions with effective dates of July 16, 1995 or later are not processed until you run *Mass Update PE Actions* again with a later *As of Date*.

Security Considerations

If you do not see all of the transactions listed above when you display the prompt screen for the *Enter Personnel Actions* function, you may not have authority to use some of the transactions. Your system administrator uses a security function to restrict each user to the transactions appropriate for him or her.

Coordination with Payroll

If you enter future-dated personnel action transactions, you should use the *Mass Update PE Actions* option on a regular basis. Since some of the future-dated transactions may affect payroll processing, you need to execute the *Mass Update PE Actions* function in advance of the begin cycle of pay cycle processing.

These five personnel action transactions affect Infinium PY data:

- Demotion
- Salary Change
- Promotion
- Rehire
- Transfer

When you enter a future-dated salary change transaction for an employee, the *Mass Update PE Actions* function updates the employee’s payroll rates in the payroll data record in Infinium PY. The payroll rates are used by Infinium PY during cycle processing to generate an employee’s pay.

Transactions that you use to update an employee’s position assignment can also affect payroll cycle processing. For example, when you enter a future-dated promotion, demotion, transfer, or rehire transaction, you use the *Mass Update PE Actions* function to update the employee’s level assignments. Infinium PY typically uses the employee’s levels during cycle processing to generate general ledger numbers for charging labor expense; later, the same levels are used to generate employee deductions and employer liabilities.

When you assign an employee to a new position, you can also update the employee’s payroll authorization group value if you are authorized to do so. When you enter a future-dated demotion, promotion, transfer or rehire transaction, the system automatically updates the employee’s income and deduction authorizations when you run the *Mass Update PE Actions* function. Refer to the next section for additional information about this processing.

Updating the Employee’s Payroll Authorization Group Assignment

If Infinium PY users type **1** or **2** in the *PE Upd PY Auth Gp* field on the Payroll employer control, you can automatically update the value in the *PY Auth Group* field on the employee payroll data record and make corresponding changes to the employee’s income and deduction authorizations based on the employee’s new payroll authorization group assignment. The updating occurs when you enter the following four transactions using the *Enter Personnel Actions* and *Mass Update PE Actions* functions in Infinium HR:

- Demotion
- Promotion
- Rehire
- Transfer

The system updates the payroll authorization group code value only when:

- the employee is assigned to a new position using one of the transactions listed above and
- the value in the *PY Auth Group* field on the new position differs from the value in the *PY Auth Group* field on the employee's Payroll Data screen 2 of 2

If you are allowed to update this payroll information, the system automatically updates the value in the employee's *PY Auth Group* field when you enter one of the above transactions using an effective date that is the same as or before the date on which you type the transaction. When you enter a transaction with an effective date that is after the date on which you type the transaction, the system updates the value in the employee's *PY Auth Group* field and the corresponding income and deduction authorizations when you run the *Mass Update PE Actions* function to process future-dated transactions. See the following section for details on processing future-dated transactions.

If you are not allowed to automatically maintain this payroll information, Infinium PY users must manually change the value in the *PY Auth Group* field when an employee is assigned to a new position and review the changes that Infinium PY automatically makes to income and deduction authorizations based on the new authorization group value.

Reviewing the Audit Report

Regardless of whether Infinium PY users manually maintain the employee *PY Auth Group* field and corresponding income and deduction changes or Infinium HR users automatically maintain them, the system automatically generates an audit report of the changes it makes to employee income and deduction authorizations when the payroll authorization group value changes.

For future-dated personnel action transactions, the system generates the report when you run the *Mass Update PE Actions* function and assigns printer file name **PYTMBGAU**. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen and locate printer file **PYTMBGAU** to review or print this report.

You can have the technical member of your staff set up a special printer control override to specify where the audit report prints. Infinium PY users should carefully review the information on this report to ensure that the employee's income and deduction authorizations are correct before they process the next payroll cycle for that employee.

Deleting Future-Dated Transactions for a Terminated Employee

When you terminate an employee who has pending future-dated transactions, you can indicate how you want the system to process the deletion of the pending transactions.

Use the following information to delete pending future-dated transactions:

1 Follow the steps for entering a termination transaction in the “Entering Personnel Actions” chapter and fill in the fields on the screen shown in Figure 15-3.

```
 6/12/14 11:43:19        Personnel Actions Update         PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80005 ACCURATE,ALAN D
Position  . . . :  114220    SAFETY ENGINEER
  TE                                Termination
TE Effective Date  _________            Current Status  :  PART
Termination . . .  _____ +              Status  . . . . .  _____ +
Rehire  . . . . .  _____ +              Keep permanently?  0  (0=No 1=Yes)
Last Day Worked .  _________            Delete Fut Trans?  1  (0=No 1=Yes)
Comment . . . . .                       Description . . .  __________________

 2=Change  4=Delete
Opt       Date        Reason     Rehire     Status        Description

F3=Exit/Update  F4=Prompt  F10=Access  F12=Cancel
```

Figure 15-3: Personnel Actions Update screen

2 Type **1** in the *Delete Future Trans* field and press Enter to display the termination record shown in Figure 15-4.

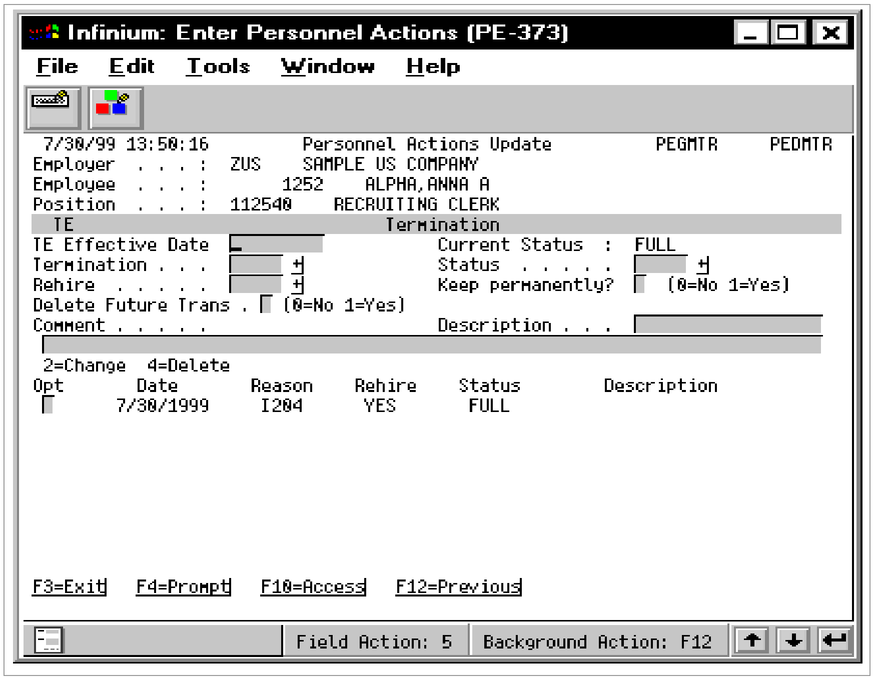


Figure 15-4: Personnel Actions Update screen

3 Press F3 to display the future-dated transaction shown in Figure 15-5.

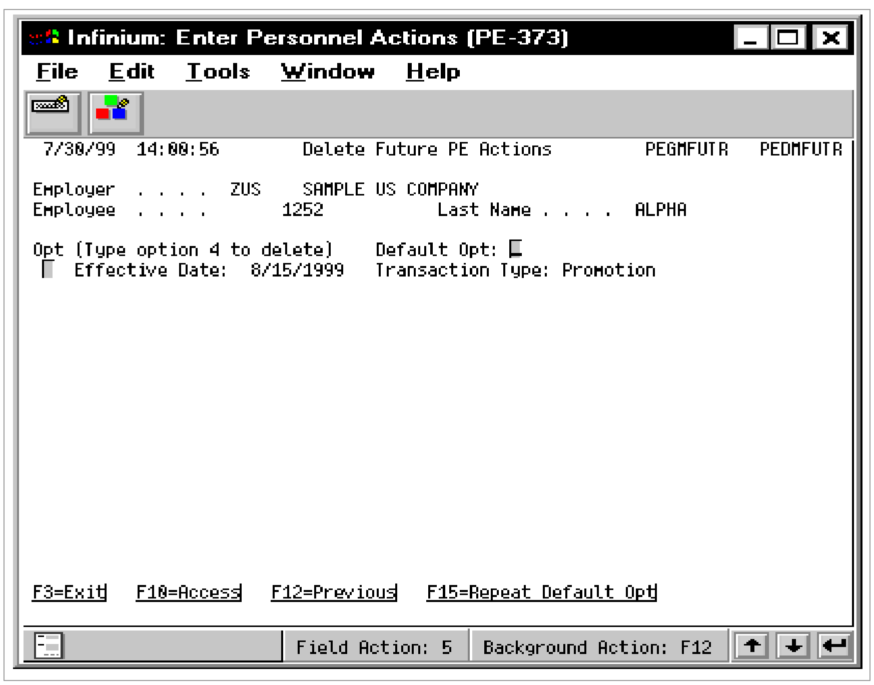


Figure 15-5: Delete Future PE Actions screen

4 Type **4** in the *Opt* field to select a transaction for deletion.

If you have multiple transactions for deletion, type **4** in the *Default Opt* field and press Enter. The system will enter **4** next to all of the transactions.

5 Press Enter to display the screen shown in Figure 15-6.

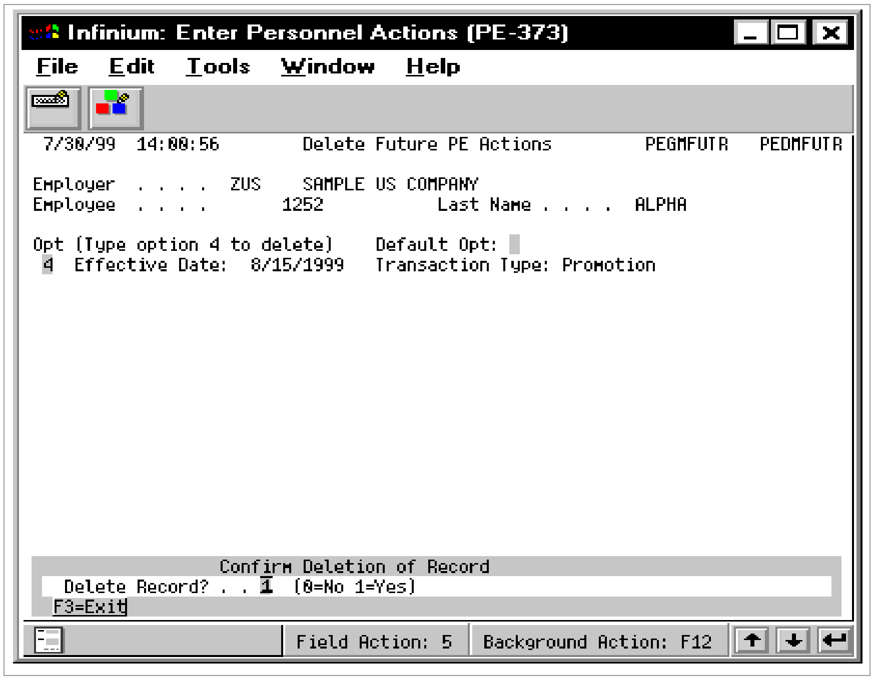


Figure 15-6: Delete Future PE Actions screen

6 Type **1** in the *Delete Record?* field to confirm deletion of the record. Repeat this step for each of the displayed transactions.

7 Press Enter and then press F3 to delete the record.

Using Trial Mass Update PE Actions

You use the *Trial Mass Update PE Actions* function to verify in advance which transactions will be processed when you run the *Mass Update PE Actions* function. You can run the *Trial Mass Update PE Actions* function for a specified date as many times as needed.

The system generates a report that indicates the pending future-dated transactions that it will process when you run the *Mass Update PE Actions* function for the same date. You can use the audit report to make corrections to any pending transactions before they are processed and used to update the employee's basic, personnel and payroll data records.

The system does not generate the Payroll Authorization Group Changes to Incomes and Deductions report until you run the *Mass Update PE Actions* function.

Follow these steps to execute the *Trial Mass Update PE Actions* function.

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Mass Update Employee Data.*
3. Select *Trial Mass Update PE Actions* [TMUPA]. The system displays the screen shown in Figure 15-7.

```
 8/08/02 23:21:52      Trial Mass Update PE Actions      PEGJC50    PEDJC50


Employer  . . . .  ___ +

As of Date  . . .  ___80802

Salary Changes  .  _  (0=No 1=Yes)    Terminations  . .  _  (0=No 1=Yes)
Status Changes  .  _  (0=No 1=Yes)    Transfers . . . .  _  (0=No 1=Yes)
Promotions  . . .  _  (0=No 1=Yes)    Personal Changes   _  (0=No 1=Yes)
Rehires . . . . .  _  (0=No 1=Yes)    Performance Rvws.  _  (0=No 1=Yes)
Demotions . . . .  _  (0=No 1=Yes)










F3=Exit   F4=Prompt   F10=Access
```

Figure 15-7: Trial Mass Update PE Actions screen

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

You must enter information in the *Employer* and *As of Date* fields. You must also specify for each transaction type whether you want to include or exclude it from the *Trial Mass Update PE Actions* processing.

Employer

Type the code that represents the employer for which you want to update future-dated transactions. Press F4 to display a list of valid employers.

As of Date

Specify the date the system should use to select pending future-dated transactions for processing. The system compares this date to the effective date of each pending future-dated transaction and selects those whose effective date is the same as or earlier than the specified *As of Date*.

When you display this screen, the system defaults the system date (today's date) in this field. You can replace it with any date prior to or after the system date, or you can use the system date. You should coordinate the date you use with payroll processing dates, such as the pay period ending date.

For example, if you have a pending future-dated salary change transaction with an effective date of 9-1-95 and you want the system to use the new rate in the payroll period ending 9-5-95, you should type an *As of Date* of at least

9-1-95. If you have other pending future-dated salary change transactions with effective dates between 9-2-95 and 9-5-95, you should type an *As of Date* of 9-5-95 to ensure that Infinium PY uses the most current rates for payroll computations.

Transactions

Type **1** next to each personnel action transaction that you want the system to process this time. Type **0** next to those transactions you do not want the system to process this time.

5 Press Enter to submit the *Trial Mass Update PE Actions* function for processing. The system generates the following message at the bottom of the Trial Mass Update PE Actions selection screen and returns you to the Infinium HR main menu:

Building submission request...

The system generates the Trial Mass Update PE Actions report using batch processing. 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.

You can use this report to confirm which pending future-dated transactions will be processed when you run the *Mass Update PE Actions* function. The system does not update employee records when you run the *Trial Mass Update PE Actions* function.

If you need to make corrections to any of the transactions included in the report or find that some transactions you expected to see are not included in the report, use the *Enter Personnel Actions* function to research the transactions and make appropriate changes.

Use the information in the “Changing Personnel Actions” section of this chapter to make changes and then rerun the *Trial Mass Update PE Actions* function to confirm that your changes are correct.

Using Mass Update PE Actions

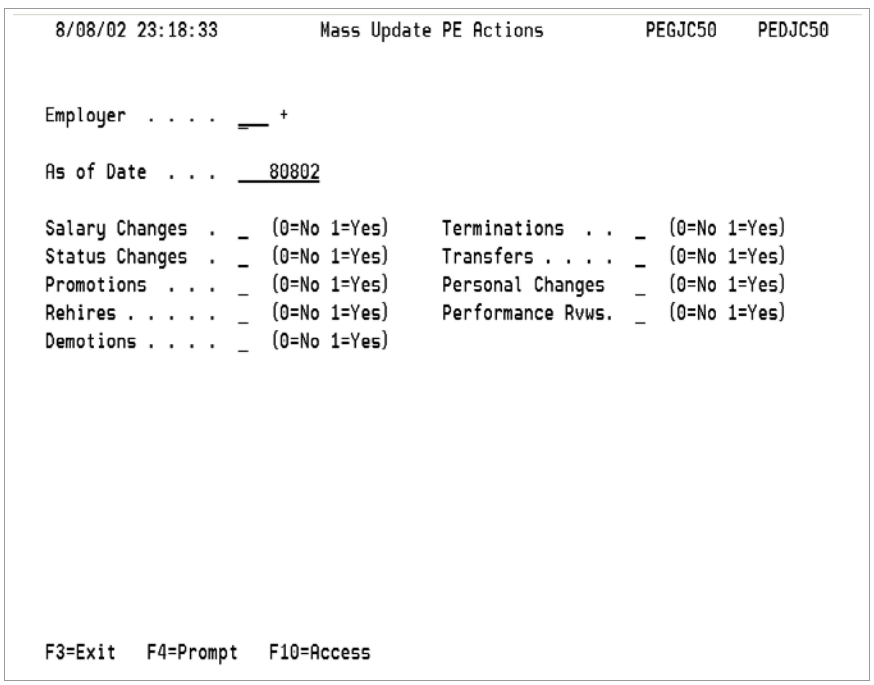
When you are satisfied that the information shown on the *Trial Mass Update PE Actions* report is correct, use the *Mass Update PE Actions* function to process the transactions and update employee basic, personnel and payroll data with the new information. As the system processes each transaction, it removes its future-dated indicator so that the same transactions are not re-processed the next time you use the *Trial* or *Mass Update PE Actions* functions.

Follow these steps to execute the *Mass Update PE Actions* function.

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

2 Select *Mass Update Employee Data.*

3 Select *Mass Update PE Actions* [MUPA]. The system displays the screen shown in Figure 15-8.



```
 8/08/02 23:18:33         Mass Update PE Actions          PEGJC50    PEDJC50


Employer  . . . .  ___ +

As of Date  . . .  ___80802

Salary Changes  .  _  (0=No 1=Yes)     Terminations  . .  _  (0=No 1=Yes)
Status Changes  .  _  (0=No 1=Yes)     Transfers . . . .  _  (0=No 1=Yes)
Promotions  . . .  _  (0=No 1=Yes)     Personal Changes   _  (0=No 1=Yes)
Rehires . . . . .  _  (0=No 1=Yes)     Performance Rvws.  _  (0=No 1=Yes)
Demotions . . . .  _  (0=No 1=Yes)









F3=Exit   F4=Prompt   F10=Access
```

Figure 15-8: Mass Update PE Actions screen

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

You must enter information in the *Employer* and *As of Date* fields. You must also specify for each transaction type whether you want to include or exclude it from the *Mass Update PE Actions* processing.

Employer

Type the code that represents the employer for which you want to update future-dated transactions. Press F4 to display a list of valid employers.

As of Date

Specify the date the system should use to select pending future-dated transactions for processing. The system compares this date to the effective date of each pending future-dated transaction and selects those whose effective date is the same as or earlier than the specified *As of Date*.

When you display this screen, the system defaults the system date (today's date) in this field. You can replace it with any date prior to or after the system date, or you can use the system date. You should coordinate the date you use with payroll processing dates, such as the pay period ending date.

For example, if you have a pending future-dated salary change transaction with an effective date of 9-1-95 and you want the system to use the new rate in the payroll period ending 9-5-95, you should type an *As of Date* of at least 9-1-95. If you have other pending future-dated salary change transactions with effective dates between 9-2-95 and 9-5-95, you should type an *As of Date* of 9-5-95 to ensure that Infinium PY uses the most current rate for payroll computations.

However, if you have pending salary changes that are effective 9-10-95 you do not want to specify 9-10-95 as the *As of Date* in this example because the payroll rates for those employees are updated by the *Mass Update PE Actions* function and are used in the next Payroll cycle in advance of their true effective date.

Transactions

Type **1** next to each personnel action transaction that you want the system to process this time. Type **0** next to those transactions you do not want the system to process this time.

5 Press Enter to submit the *Mass Update PE Actions* function for processing. The system generates the following message at the bottom of the Mass Update PE Actions selection screen and returns you to the Infinium HR main menu:

Building submission request...

The system generates the Mass Update PE Actions report using batch processing. 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.

You can use this report to confirm which pending future-dated transactions were processed when you run the *Mass Update PE Actions* function. The system updates employee records when you run the *Mass Update PE Actions* function.

If as a result of the future-dated transactions the employee should be assigned to a new payroll authorization group and Infinium HR users are allowed to update this information, the system automatically updates the value in the *PY Auth Group* field in the employee payroll data record when you use the *Mass Update PE Actions* function.

It also updates the employee's income and deduction authorizations and generates the Payroll Authorization Group Changes to Income and Deductions audit report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen or the Work with Printer Output screen and locate printer file **PYTMBGAU** to review or print this report.

Using Performance Review Controls

When you enter a performance review transaction for an employee in the *Enter Personnel Actions* function, you can use review controls to automate the determination of the employee's next performance review type and date.

You define a review control table that uses rating scores and month criteria to determine the type of performance review the employee should next receive and the date of that review. You assign an appraisal rating score to each employee when you type his or her performance review transaction. After you type the employee's current review information, you press F8 on the Performance Review screen to have the system use the review control to automatically fill the *Next Review* and *Next Review Date* fields on the screen.

As you hire employees, you assign them a code value that represents the first type of performance review they will receive. You use the performance review transaction to maintain the *Next Review* field. The system uses the employee's current review type to determine his or her next review type.

Follow these steps to automatically fill the employee's *Next Review Type* and *Date* fields when you type a performance review transaction:

- Establish Performance Review Code Values.
- Define the Performance Review Control.
- Use the Calculate Function in the Performance Review Transaction.

Establishing Performance Review Code Values

Before you can enter performance review transactions in the *Enter Personnel Actions* function or define the performance review controls, you must define code values for code type **RTP**. You establish a code value for each type of performance appraisal at your site.

For example, you may define the code values shown in the table below.

Review Type Code Value	Description	Next Review Type
PROB	Performance review for new hires at the completion of their initial probationary period of employment	If successful: **MERIT** If failing: **GOALS**
MERIT	Annual merit review for existing employees with successful job performance	If successful: **MERIT** If failing: **GOALS**
GOALS	Performance review for employees on a goals and objective program to improve their job performance	If successful: **PROB** If failing: **EXIT**
EXIT	Final performance review prior to terminating an employee for poor job performance.	Not applicable.

See the *Infinium HR Guide to Controls* for details on how to establish code values for your employer(s).

Defining Performance Review Controls

You define a performance review control record for each type of performance review at your site. The system uses the review control record to determine the next type of performance review an employee should receive and the date of that review.

For example, you define a review control record for the code value **PROB** that directs the system to assign a next review type of **MERIT** to an employee who has received a successful probationary review rating, and a next review type of **GOALS** if the employee receives a failing score. You use the *Rating Score* field on the Review Control to indicate which type of next review is appropriate for each level of performance.

The system uses the *Months* and *Date Frequency* fields on the review control record to calculate the employee's next review date. You indicate the number of months from a specified date that are appropriate for each type of upcoming performance review.

Follow these steps to define performance review controls:

1 From the Infinium HR main menu select *Master Files.*

2 Select *Update Master Files.*

3 Select *Update Review Controls* [UPRC]. The system displays the screen shown in Figure 15-9.

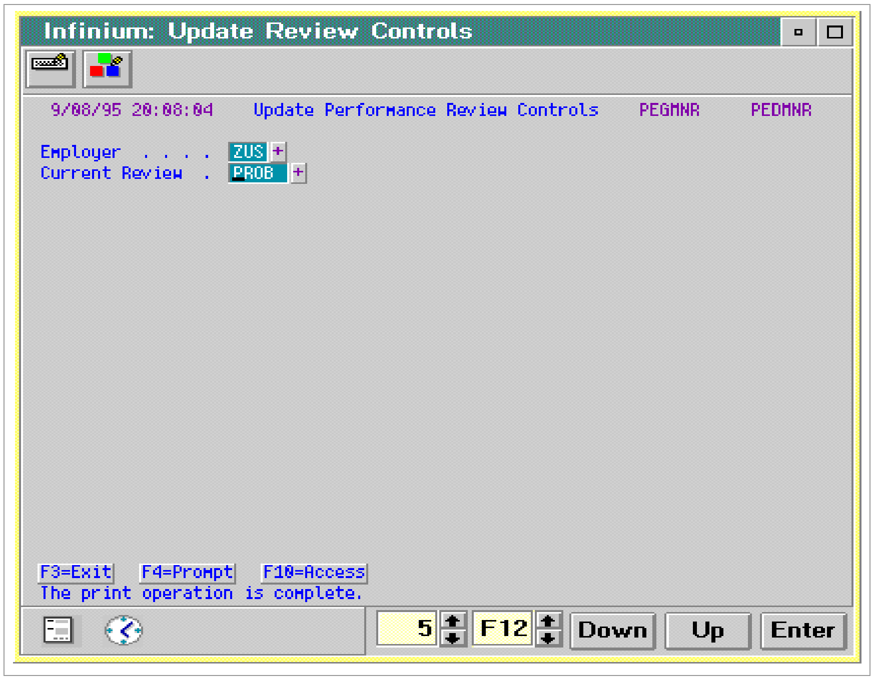


Figure 15-9: Update Performance Review Controls prompt screen

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

You must fill in both of the fields on this screen.

Employer

Type the code that identifies the employer for which you want to establish performance review controls.

Current Review

Type the code value that identifies the performance review type for which you want to establish performance review controls. The system uses this control record for employees who are receiving the specified type of performance review. You define code values for this field using code type **RTP**

For example, if you establish a performance review control for code type **PROB**, the system uses it when you type a performance review transaction in the *Enter Personnel Actions* function for an employee whose current review type is **PROB**.

5 Press Enter. The system displays the screen shown in Figure 15-10.

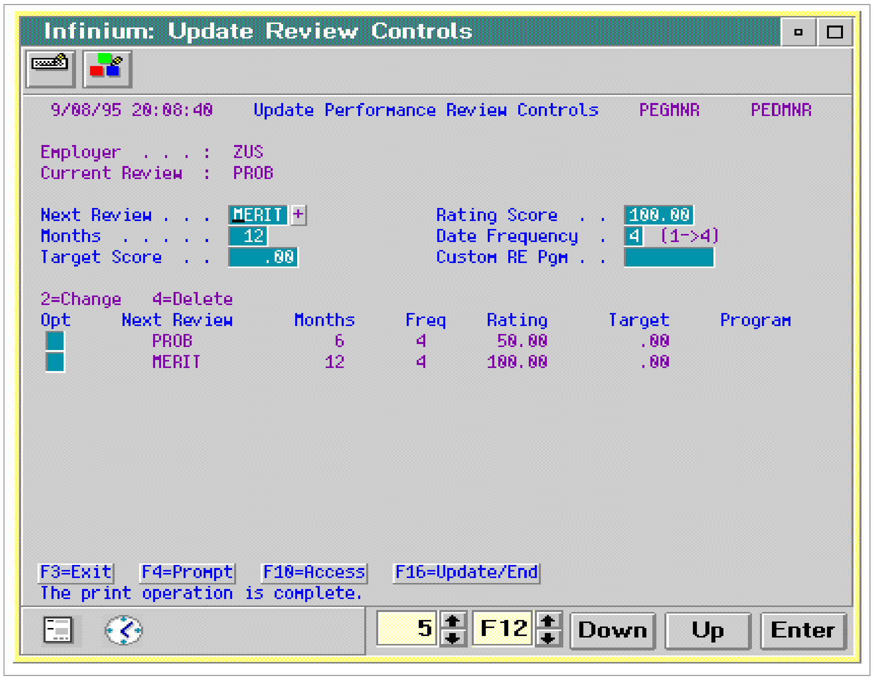


Figure 15-10: Update Performance Review Controls screen

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

You may associate several different *Next Review* code values with the review type specified on the preceding prompt screen. For example, an employee who receives a goals and objectives review can be next scheduled for an annual merit review, another goals review or an exit review, depending on his or her appraisal rating score.

You must type information in the *Next Review, Rating Score, Months* and *Date Frequency* fields. You use the *Target Score* and *Custom RE Pgm* fields to handle unique needs at your site.

Next Review

Type the code value that indicates the type of performance review the employee should receive next. You define code values for this field using code type **RTP**. The system uses this code value along with the numeric value in the *Rating Score* field to assign an employee to his or her next performance review type.

Rating Score

Type the numeric score an employee must attain to receive the *Next Review* code type specified above. This is a five-character field with two decimal places. The largest number you can type is 999.99.

The system compares this value to the rating score you type for an employee on the performance review transaction screen, and then selects the appropriate next review type for the employee.

For example, for employees who receive a **PROB** review you establish a rating score of **50** for them to be assigned to the **GOALS** next review type and **100** for them to be assigned to the **MERIT** next review type. When you enter the performance review transaction, the system assigns a next review type of **GOALS** to employees who receive a score between 50 and 99 and **MERIT** to employees whose rating scores are 100 or more. If employees receive a score of less than 50, the system generates an error message on the performance review transaction screen.

Months

Type the number of months the system should use to calculate the date of the employee's next performance review. This is a three-character field. The largest value you can type is 999. The system uses this value and the value in the *Date Frequency* field to compute the next review date.

Date Frequency

Type the value that indicates the date the system uses to determine the employee's next performance review date. The system adds the number of months you type in the *Months* field to the date you specify here to calculate the next performance review date for employees.

Valid values are:

1	Date of Hire
2	Adjusted Date of Hire
3	Job Seniority Date
4	Last Scheduled Review Date

The system stores the first three dates in the employee's basic data record. You type the fourth date on the Performance Review screen in the *Enter Personnel Actions* function when you record a performance review for an employee.

For example, if you type **12** in the *Months* field and specify a *Date Frequency* value of **4**, which represents the effective date of the employee's current review, the system adds twelve months to the date you type in the *RE Effective Date* field on the Performance Review transaction screen to calculate the employee's next performance review date. Therefore, if an employee’s *RE Effective Date* is March 1, 1994, the system calculates his or her next review date as March 1, 1995.

Target Score

You can use this field with your custom program to do additional computations, if necessary, or you can use this field for informational purposes if you do not use a custom program. This is a five-character field with two decimal places.

Leave this field blank if it is not needed for your custom program or for other informational purposes.

Custom RE Pgm

Type the name of your custom performance review control program. The system calls this program when you type a rating score in an employee’s performance review transaction in the *Enter Personnel Actions* function that is equal to or exceeds the value in the *Target Score* field described above. The system validates the name of your custom program. Leave this field blank if you do not have a custom program.

7 Press Enter to store your information in the sub-file of this screen. Repeat steps 6 and 7 as many times as you need to define all of the potential next review types that apply to the Review Type specified on the prompt screen for this function.

8 Press F16 to exit from this screen and save all of the information in the sub-file of this screen.

The system displays the Infinium HR main menu.

Repeat all of the preceding steps in this section to establish performance review controls for other review types.

Using the Calculate Function

After you have established performance review controls, you use them to automatically calculate the employee’s next performance review type and date when you type a performance review transaction in the *Enter Personnel Actions* function.

The “Entering Personnel Actions” chapter provides details on how to type a Performance Review transaction. This section only addresses how to use the *Calculate* function on the Performance Review screen.

Follow these steps to access the Performance Review screen:

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

2 Select *Update Employee Data.*

3 Select *Enter Personnel Actions* [EPA]. The system displays the screen shown in Figure 15-11.

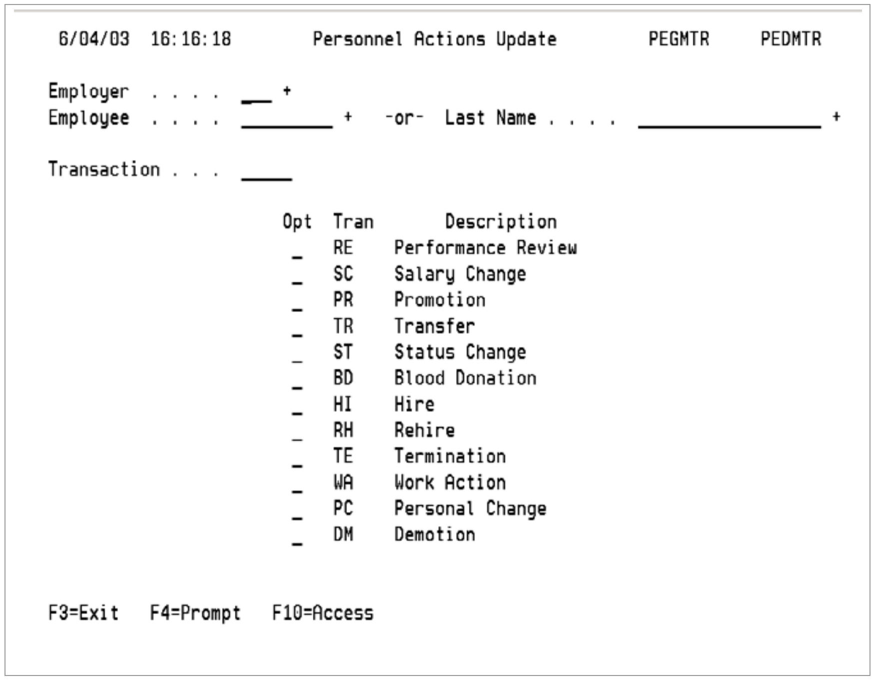


Figure 15-11: Personnel Actions Update prompt screen

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

Specify the employer and employee on this screen. Select the **RE** personnel actions transaction on this screen and press Enter. The system displays the screen shown in Figure 15-12.

```
 6/12/14 11:06:59        Personnel Actions Update         PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :       1252 ALPHA,ANNA A
  RE                              Performance Review
RE Effective Date  _________             Current Review  :  PROB
Rating . . . . .   _____ +               Rating Score  . .  ___.00
Next Review . . .  _____ +               Promotion . . . .  _____
Next Review Date.  _________             Sup. Employer . .  ZUS
RE Employer . . .  ZUS +                 Sup. Name: ACCURATE,ALAN
RE Employee . . .  _________ +
Comment . . . . .                        Description . . .  __________________

 2=Change  4=Delete  8=Additional Information
Opt    Date     Rating   - Next Review --   - Reviewer --     Description






F3=Exit/Update  F4=Prompt  F8=Calc  F10=Access  F12=Cancel  F13=Training Nomin
```

Figure 15-12: Performance Review screen

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

In order to use the performance review controls to calculate the employee's *Next Review* and *Next Review Date* fields, you must first assign the employee to a review type before you use this screen. You can type the appropriate code in the *Next Review* field in the employee's basic data record.

The system displays the code value from the *Next Review* field in the employee's basic data record in the *Current Review* field on this screen. The system uses the performance review control you established for this code to determine the employee's next review type and date.

When you use performance review controls, you must type information in the following fields:

- *RE Effective Date*
- *Rating*
- *Rating Score*
- *RE Employer*
- *RE Employee*

See the "Entering Personnel Actions" chapter for details on how to complete these fields.

Leave the *Next Review* and *Next Review Date* fields blank.

6 Press F8 to calculate. The system fills the *Next Review* and *Next Review Date* fields based on the criteria on the performance review control you established for the code value displayed in the *Current Review* field.

7 Press Enter to store your information in the sub-file of this screen. Press F3 to exit from this screen. The system updates the employee's *Next Review* and *Next Review Date* fields in his or her basic data record unless you typed a future-dated transaction.

   If you entered a future-dated performance review transaction, the system updates the employee's basic data record with the new performance review information when you execute the *Mass Update PE Actions* function with an *As of Date* that is the same as or after the transaction's effective date.

8 The system displays the Personnel Actions Update prompt screen. You can enter another personnel action transaction or press F3 to return to the Infinium HR main menu.

Using Custom Programs

Custom Transaction Programs

You have access to user exit fields that allow you to specify custom programs for each type of personnel action. The system uses your custom program to do additional processing when you type the personnel actions transaction with which it is associated.

For example, for rehire transactions at your site you want the system to calculate an adjusted date of hire for the rehired employee based on your specifications and automatically update the *Adjusted D.O.H.* field in his or her basic data. Your MIS staff writes a custom program to accomplish this and you type the name of that program in the user exit provided. The system runs your custom program each time you type a rehire transaction in the *Enter Personnel Actions* function.

If you type a future-dated personnel action transaction associated with a custom program, the system runs your custom program when you use the *Trial Mass Update PE Actions* and *Mass Update PE Actions* functions to process the future-dated transaction.

The system uses your custom program(s) in the following functions:

- *Enter New Hires*
- *Update Employee Data* - only when used to hire a new employee
- *Enter Personnel Actions*
- *Trial Mass Update PE Actions*
- *Mass Update PE Actions*

Custom Locality Programs

You have access to user exit fields that allow you to specify custom programs for each type of personnel action. The system uses your custom program to populate locality fields when you enter the personnel actions transaction with which it is associated.

When you use the *Enter Personnel Actions* function for the following personnel actions, you can use custom programs to update locality information:

- New hire
- Rehire
- Promotion
- Demotion
- Transfer
- Personal change

For new hire transactions, the system updates the following fields in the basic data file:

- *User Field 1*
- *User Field 3*

For new hire transactions, the system updates the following fields in the payroll master file:

- *Current County*
- *Home County*
- *Current City*
- *Home City*
- *Curr School Dist*
- *Home School Dist*
- *Current Misc Loc*
- *Home Misc. Loc*
- *Current State*
- *Home State*
- *SUTA State*
- *Home Tax Co* (multi-tax only)

For rehire, promotion, demotion and transfer transactions, the system updates the following fields in the payroll master file:

- *Current County*
- *Current City*
- *Curr School Dist*
- *Current Misc Loc*

- *Current State*
- *SUTA State*
- *Home Tax Co* (multi-tax only)

For personal change transactions, the system updates the following fields in the basic data file:

- *User Field 1*
- *User Field 3*

For personal change transactions, the system updates the following fields in the payroll master file:

- *Home County*
- *Home City*
- *Home School Dist*
- *Home Misc. Loc*
- *Home State*

The following section provides you with information on how to access the user exit fields for personnel actions for an established employer. The user exits are stored on the third screen of the employer control record. See the *Infinium HR Guide to Controls* for complete information on how to establish an employer control record.

Follow these steps to access the employer control record:

1 From the Infinium HR main menu select *Master Files.*

2 Select *Update Master Files.*

3 Select *Update Employer Control* [UC]. The system displays the screen shown in Figure 15-13.

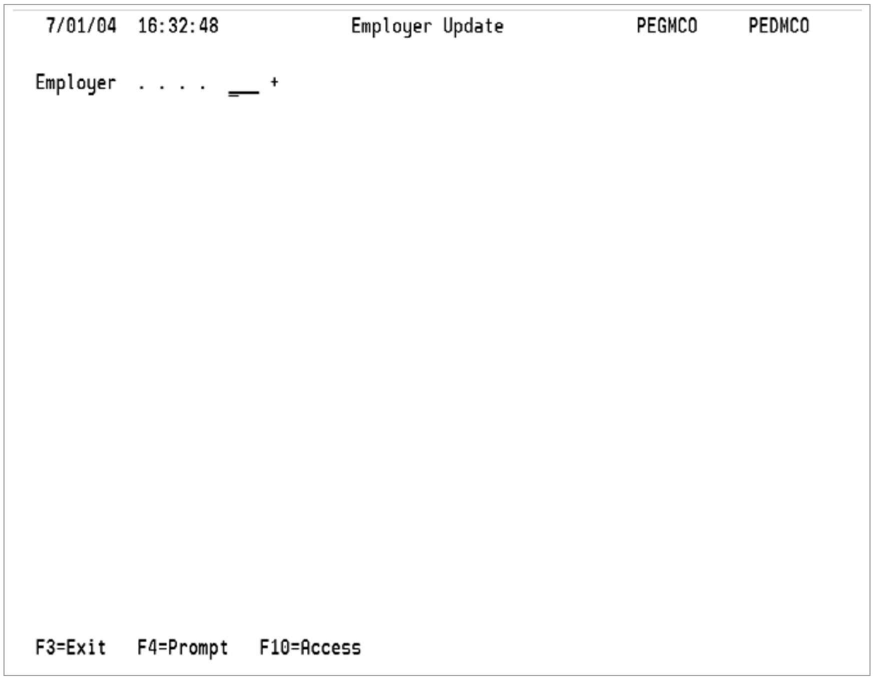


Figure 15-13: Employer Update prompt screen

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

Type the code that identifies the employer with which you want to associate custom personnel action programs. Press Enter three times to display the third screen of the employer control record.

The system displays the screen shown in Figure 15-14.

```
 7/01/04  16:34:15           Employer Update          PEGMCO     PEDMCO
                                                          Page  3 of  3
Employer  . . . :  ZUS    SAMPLE US COMPANY

Custom Transaction Programs to Call
Blood Donations  .  __________       Demotions  . . . .  __________
New Hire . . . . .  __________       Personal Change  .  __________
Promotion  . . . .  __________       Performance Review  __________
Re-Hire  . . . . .  __________       Salary Change  . .  __________
Status Change  . .  __________       Termination  . . .  __________
Transfer . . . . .  __________       Work Action  . . .  __________

Custom Exit Programs to Populate Locality Data
New Hire . . . . .  __________       Rehire . . . . . .  __________
Promotion  . . . .  __________       Demotion . . . . .  __________
Transfer . . . . .  __________       Personal Change. .  __________




F3=Exit   F10=Access    F12=Previous
```

Figure 15-14: Employer Update screen 3

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

Custom Transaction Programs to Call

You can associate a custom program with each personnel action transaction type. You can use custom programs with as many personnel action transactions as are needed at your site to support your unique processing needs.

A sample shell custom program **PEGEXIT1** is provided for your MIS staff to review or modify as needed. Your MIS staff can assign any 10-character name to the custom program(s) they write. The system validates each program name you enter on this screen to ensure that a custom program exists by that name in one of the libraries in your Infinium HR database.

You can associate a custom program with the following personnel action transactions:

- Blood Donation
- Hire Transaction
- Promotion
- Rehire
- Status Change

- Transfer
- Demotions
- Personal Change
- Performance Review
- Salary Change
- Termination
- Work Action

Custom Exit Programs to Enter Locality Data

Type the name of the custom program adjacent to the personnel actions transaction for which it will do additional processing.

You can associate a custom program with the following personnel action transaction types:

- New hire
- Rehire
- Promotion
- Demotion
- Transfer
- Personal change

You can use custom programs with as many personnel action transactions as are needed at your site to support your unique processing needs.

A sample shell custom program, **PEGEXITLC**, is provided for your MIS staff to review or modify as needed. Your MIS staff can assign any 10-character name to the custom programs they write. The system validates each program name you enter on this screen to ensure that a custom program exists by that name in one of the libraries in your Infinium HR database.

6 Press Enter to update the employer control with the new program names. The system displays the prompt screen for the employer control. Type the code that identifies another employer with which you want to associate personnel action transaction custom programs or press F3 to return to the Infinium HR main menu.

Notes

Chapter 16 Displaying Employee History

16

The chapter consists of the following topics:

Overview of Displaying Employee History

This chapter provides you with an overview of the various types of employee history information you can display when you use the *Display Employee Data* function in Infinium HR. The system displays the personnel action transactions you entered using the *Enter Personnel Actions* function.

You can find information about additional displays of employee data in other parts of this book. For example, the “Displaying Employee Information” chapter provides details on how to display employee data you input using the *Enter New Hire* or *Update Employee Data* functions.

Objective

In this chapter, you become familiar with how to use the *Display Employee History* function to review the personnel actions transactions of a particular employee or a group of employees assigned to a particular set of levels. You also become familiar with how to use additional employee history displays to view salary changes, performance reviews, work actions and blood types for groups of employees within a specified employer.

Using Display Employee History

You use the *Enter Personnel Actions* function to maintain each employee's basic data information. When you enter any of the 13 types of transactions for an employee, the system updates the employee's records and stores the transaction in each employee's history.

You can use the *Display Employee History* function to review personnel action transactions of a particular employee or of a group of employees assigned to a particular set of levels. The personnel action transactions are listed below:

- Performance Review
- Salary Change
- Promotion
- Transfer
- Status Change
- Blood Donation
- Hire
- Rehire
- Termination
- Work Actions
- Personal Changes
- Demotion

See the parts in this guide entitled "Entering Personnel Actions" and "Using Additional Personnel Action Functions" for details on how to enter transactions.

When you review history transactions of an individual employee, you can specify a particular type of transaction, such as salary change, or you can select all of the employee's transactions. You can view the history records in a compressed display or in full-screen format for each transaction. You can also review an employee's transactions in multiple employers, if the employee was transferred between employers and retained the same employee number in all companies.

You can view a particular type of personnel action transaction, such as transfer, for all employees within a specified employer, or for all employees assigned to a particular level(s) within an employer.

If you are not authorized to use one or more of the personnel action transaction types, you cannot display information for it or them through the *Display Employee History* function.

This section is divided into five parts:

- Displaying Selected Transactions for an Employee
- Displaying All Transactions for an Employee
- Displaying Summarized History for an Employee
- Viewing Cross-Employer History for an Employee
- Displaying Summarized History for Multiple Employees

Follow these steps to access the *Display Employee History* function:

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

2 Select *Display Employee Data.*

3 Select *Display Employee History* [DEH]. The system displays the screen shown in Figure 16-1.

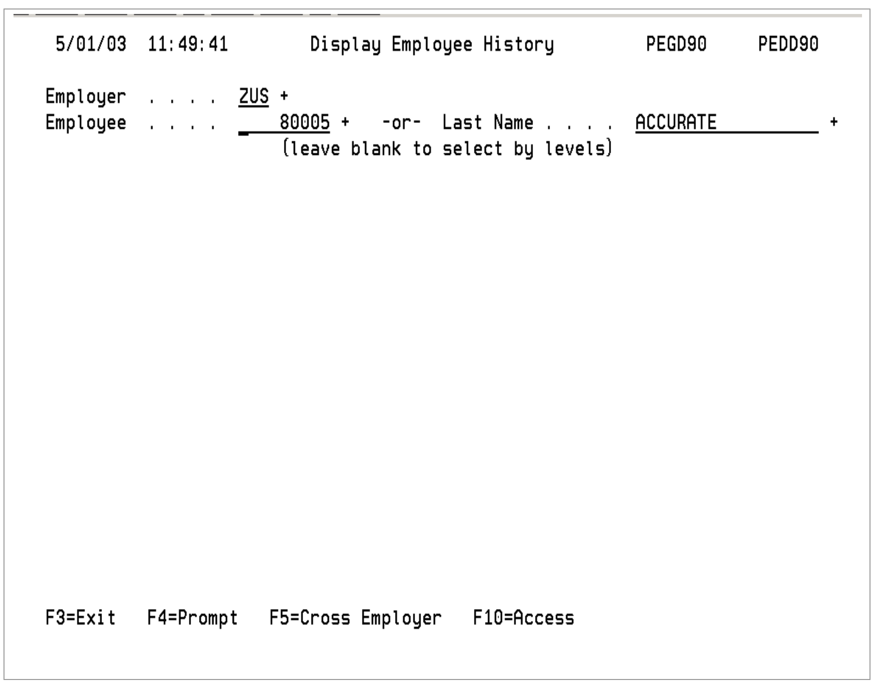


Figure 16-1: Display Employee History first prompt screen

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

In this section you learn how to display selected history transactions of a specified employee, display all of an employee's history transactions in detail or generate a summary display of selected history transactions for a particular employee.

Employer

Type the code that identifies the employer within which the employee works. Press F4 to display a list of valid employer codes.

Employee

Type the employee's number. 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, then press Enter. The system displays the *Display Employee History* prompt screen and fills in the employee's number and name.

5 Press Enter. The system displays the screen shown in Figure 16-2.

```
 5/01/03  11:50:23       Display Employee History        PEGD90     PEDD90
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005    ACCURATE,ALAN N




Beginning date  .  _________
Ending date . . .  _________             Descending Order?  0  (0=No 1=Yes)

                       Opt  Tran   Description of Transaction
                        _   RE     Performance Review
                        _   SC     Salary Change
                        _   PR     Promotion
                        _   TR     Transfer
                        _   ST     Status Change
                        _   BD     Blood Donation
                        _   HI     Hire
                        _   RH     Rehire
                        _   TE     Termination
                        _   WA     Work Actions                              +

F3=Exit   F10=Access   F12=All Transactions   F15=Summarized History
```

Figure 16-2: Display Employee History second prompt screen

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

You use this screen to select the type of history display you want to view for the specified employee. You can choose one or more personnel action transaction(s) to view, select a detailed display of all transactions for the employee or select a summary view of some or all transactions for the employee.

Displaying Selected Transactions

Use the following information to display one or more selected transactions for a specified employee.

Beginning date

Type the date of the earliest transaction that you want to view. The system compares this date to the *Effective Date* field for each transaction in the employee's history and displays only those transactions that were effective on or after this date.

Leave this field blank if you want to view all of the employee's transactions without a beginning date restriction.

Ending date

Type the date of the most recent transaction that you want to view. The system compares this date to the *Effective Date* field for each transaction in the employee's history and displays only those transactions that were effective on or before this date.

Leave this field blank if you want to view all of the employee's transactions without an ending date restriction.

Descending Order?

Specify whether to sort employee transactions by transaction date in ascending order, oldest to newest, or descending order, newest to oldest. Valid values are:

0	Sort in ascending sequence by transaction date
1	Sort in descending sequence by transaction date

Opt

Type any character in this field next to the personnel action transaction(s) that you want to view for the specified employee.

7 Press Enter to display the first of the selected transactions for the specified employee as shown in Figure 16-3.

```
_ 7/28/00  16:18:35       Display Employee History        PEGD90     PEDD90

 Employee  . . . :      80009    CARGO,CARRIE D

 10/01/1999 Salary Change      ZUS                                  Reason PROMO
Pay Type H   Freq H Inc%  87.50   New Salary       15.0000  Comp Ratio 81.10
Incr Amt         7.0000  Q1 Job Code 600   Position 401600 Grade MECH


 10/31/1999 Salary Change      ZUS                                  Reason CONTR
Pay Type H   Freq H Inc%   1.66   New Salary       15.2500  Comp Ratio 82.24
Incr Amt         0.2500  Q1 Job Code 600   Position 401600 Grade MECH


  1/01/2000 Salary Change      ZUS                                  Reason CONTR
Pay Type H   Freq H Inc%   3.27   New Salary       15.7500  Comp Ratio 85.51
Incr Amt         0.5000  Q1 Job Code 600   Position 401600 Grade MECH

                                                                              +



 F3=Exit   F10=Access
```

Figure 16-3: Display Employee History screen

If the employee has more than one transaction, the system displays **+** in the lower right-hand corner of the screen. Press PageDown to view the additional transactions.

8 After you have viewed all of the employee’s selected transactions, press Enter or F3 to return to the prompt screen shown above.

Displaying All Transactions for an Employee

You can easily display all personnel action history transactions for a specified employee. The system displays one screen for each transaction.

1 Follow the directions above to display the screen shown in Figure 16-2.

2 Press F12 on this screen to automatically display all of the employee’s history transactions. The system displays one screen for each personnel action transaction in the employee’s history. Press PageDown to view the transaction on the next screen.

3 Press F3 to exit from the employee’s history display.

Displaying Summarized History for an Employee

You can view a summary display of one or more personnel action transactions for a specified employee. The system displays key information for up to four transactions per screen.

1 Follow the directions above to display the screen shown in Figure 16-2.

2 Type any character in the *Opt* field to select transactions you want to include in the summary display.

3 Press F15 on this screen to automatically display the selected transactions in summary mode as shown in Figure 16-4.

```
_ 7/28/00  16:18:35       Display Employee History        PEGD90     PEDD90

 Employee  . . . :      80009    CARGO,CARRIE D

 10/01/1999 Salary Change      ZUS                                 Reason PROMO
Pay Type H   Freq H Inc%  87.50   New Salary       15.0000  Comp Ratio 81.10
Incr Amt         7.0000  Q1 Job Code 600   Position 401600 Grade MECH


 10/31/1999 Salary Change      ZUS                                 Reason CONTR
Pay Type H   Freq H Inc%   1.66   New Salary       15.2500  Comp Ratio 82.24
Incr Amt         0.2500  Q1 Job Code 600   Position 401600 Grade MECH


  1/01/2000 Salary Change      ZUS                                 Reason CONTR
Pay Type H   Freq H Inc%   3.27   New Salary       15.7500  Comp Ratio 85.51
Incr Amt         0.5000  Q1 Job Code 600   Position 401600 Grade MECH

                                                                          +



 F3=Exit   F10=Access
```

Figure 16-4: Display Employee History screen

The system displays key information for the selected transactions; each screen displays up to four transactions. Press PageDown to view the transactions on the next screen.

4 Press F3 to exit from the employee's history display.

Displaying Cross-Employer History for an Employee

If you transfer an employee between employers and assign him or her the same employee number in all employers, you can use the *Display Employee History* function to view his or her transactions in all employers. You can use the detailed or summary displays described above. Follow these steps to display cross-employer history for an employee.

1 Follow the directions above to display the screen shown in Figure 16-5 below.

```
 5/01/03  11:51:44       Display Employee History        PEGD90     PEDD90

Employer  . . . .  ZUS +
Employee  . . . .      80005 +    -or-  Last Name . . . .  ACCURATE           +
                        (leave blank to select by levels)











F3=Exit   F4=Prompt   F5=Cross Employer   F10=Access
                                                                              +
```

Figure 16-5: Display Employee History first prompt screen

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

The employee must have the same number in all employers for you to use the cross-employer history display.

Employer

Leave this field blank to display cross-employer history for an employee.

Employee

Type the employee number of the employee who has records in more than one employer. If you are unsure of his or her number, use the *Last Name* field.

Last Name

Type some or all of the employee’s last name, then press F4. The system displays the employee’s name in as many employers as he or she has records. Make note of the employee’s number.

Press F3 to exit from the Employee Locate screen. Type the employee’s number in the *Employee* field.

3 Press F5 to display the prompt screen for cross-employer history shown in Figure 16-6.

```
 5/01/03  11:52:07       Display Employee History        PEGD90     PEDD90
Employer  . . . :  ZUS    SAMPLE US COMPANY
Employee  . . . :      80005    ACCURATE,ALAN N




Beginning date  .  _________
Ending date . . .  _________           Descending Order?  0 (0=No 1=Yes)

                       Opt  Tran   Description of Transaction
                        _   RE     Performance Review
                        _   SC     Salary Change
                        _   PR     Promotion
                        _   TR     Transfer
                        _   ST     Status Change
                        _   BD     Blood Donation
                        _   HI     Hire
                        _   RH     Rehire
                        _   TE     Termination
                        _   WA     Work Actions                                +

F3=Exit   F10=Access   F12=All Transactions   F15=Summarized History
                                                                               +
```

Figure 16-6: Display Employee History

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

Follow the instructions in the “Displaying Selected Transactions,” “Displaying All Transactions” or “Displaying Summarized History” sections to view cross-employer history for the specified employee.

The screen shown in Figure 16-7 shows a summary display of the specified employee’s transfer transactions in multiple employers.

```
_ 5/01/03  11:52:31        Employee History Display        PEGD90     PEDD90

  Employee  . . . :      80005    ACCURATE,ALAN N

  Employer  . . . :  ZUS      SAMPLE US COMPANY
  Date Entered  . :  8/09/1995          Transaction Type:  TRANSFER
  Transfer Reason Code    CCHG  CAREER CHANGE
  Termination Code
  Transfer Date      12/01/1994      Employer   ZUS  SAMPLE US COMPANY
  Transfer to Position    100140  ACCOUNTING MANAGER
  Employee number          80005
  Regular hours            80.00     Scheduled Periods    26
  Department           ACCT          Cost Centr       100
  Area                 100           Division         ADMIN
  Shift                              Job Code  140   MANAGER
  Labor Category                     Worker's  Comp
  Location             HQ            Union Code
  Sup. Employer         Sup. Name
  Description . . :
  Comments  . . . :
  WANTS TO WORK WITH NUMBERS, NOT PROGRAMS                                      +

  F3=Exit   F10=Access
                                                                                +
```

Figure 16-7: Display Employee History screen

This screen shows the employee’s transfer transaction history in three employers.

5 Press F3 to exit from the employee’s history display.

Displaying Summarized History for Multiple Employees

You can display summarized personnel action transactions for employees grouped by levels within a particular employer.

1 Follow the directions above to display the screen shown in Figure 16-8 below.

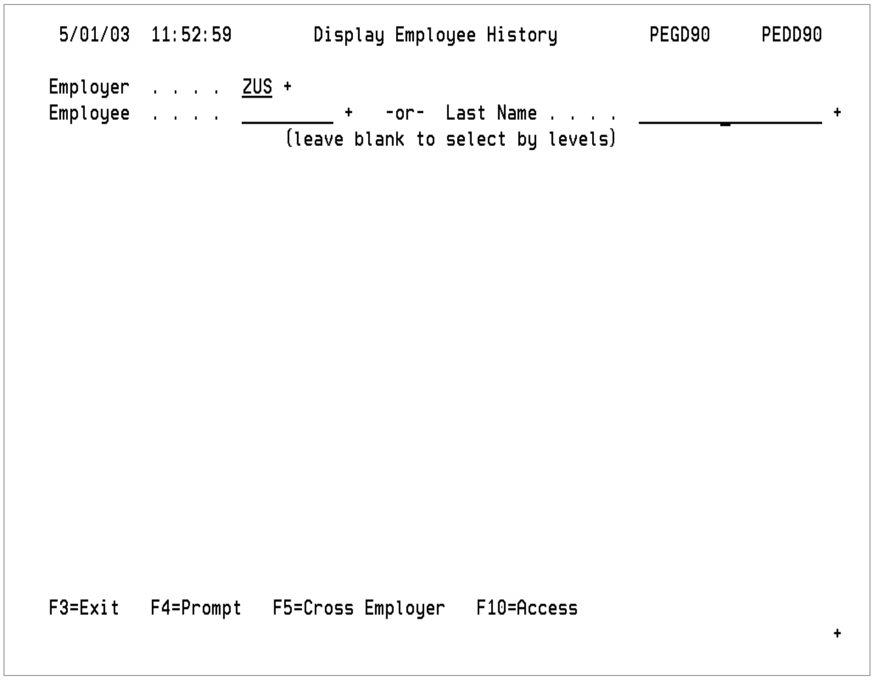


Figure 16-8: Display Employee History first prompt screen

2 Use the information below to complete the fields on this screen.

To view history for groups of employees, you must leave the *Employee* and *Last Name* fields blank. You can specify one or more levels within a particular employer or leave the level fields blank to display history for all employees within the specified employer.

Employer

Type the code that identifies the employer within which you want to display employee history. Press F4 to display a list of valid employers.

Employee

Leave this field blank to select a group of employees.

Last Name

Leave this field blank to select a group of employees.

3 Press Enter. The system displays the level descriptions assigned to the specified employer as shown in Figure 16-9.

```
 5/01/03  11:53:36       Display Employee History        PEGD90     PEDD90

Employer  . . . :  ZUS    SAMPLE US COMPANY

Area          . . .  _____ +
Division      . . .  _____ +
Department    . . .  _____ +
Cost Centr    . . .  _____ +









F3=Exit   F4=Prompt   F10=Access
                                                                          +
```

Figure 16-9: Display Employee History second prompt screen

Levels

Type in the code(s) that identifies one or more levels within the specified employer. The system will include history transactions only for employees assigned to the level(s) you specify.

Leave the level fields blank if you want history information for all employees assigned to the specified employer.

4 Press Enter. The system displays the prompt screen shown in Figure 16-10.

```
 5/01/03  11:53:58       Display Employee History        PEGD90     PEDD90
Employer  . . . :  ZUS    SAMPLE US COMPANY

Area        . . :  WESTERN AREA
Division    . . :
Department  . . :
Cost Centr  . . :
Beginning date  .  _________
Ending date . . .  _________            Descending Order?  0 (0=No 1=Yes)

                       Opt  Tran   Description of Transaction
                        _   RE     Performance Review
                        _   SC     Salary Change
                        _   PR     Promotion
                        _   TR     Transfer
                        _   ST     Status Change
                        _   BD     Blood Donation
                        _   HI     Hire
                        _   RH     Rehire
                        _   TE     Termination
                        _   WA     Work Actions                               +

F3=Exit   F10=Access   F12=All Transactions   F15=Summarized History
                                                                              +
```

Figure 16-10: Display Employee History screen

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

You can view one or transactions for the specified group of employees. You cannot use the F12 option to display all transactions when you are working with a group of employees. The system automatically presents the transactions in a summarized display whether you press Enter or F15 on this screen.

Beginning Date

Type the date of the earliest transactions that you want to view. The system compares this date to the *Effective Date* field for each transaction in the employees' history and displays only those transactions that were effective on or after this date.

Leave this field blank if you want to view all of the employees' transactions without a beginning date restriction.

Ending date

Type the date of the most recent transactions that you want to view. The system compares this date to the *Effective Date* field for each transaction in the employees' history and displays only those transactions that were effective on or before this date.

Leave this field blank if you want to view all of the employees' transactions without an ending date restriction.

Descending Order?

Specify whether to sort employee transactions by transaction date in ascending order, oldest to newest, or descending order, newest to oldest. Valid values are:

0	Sort in ascending sequence by transaction date
1	Sort in descending sequence by transaction date

Opt

Type any character in this field next to the personnel action transaction(s) that you want to view for the specified group of employees.

6 Press Enter to display the selected transactions for the specified employees. Based on the selections made on the previous two screens, Figure 16-11 illustrates salary change history for all employees in the Western Region.

```
_ 7/28/00  16:27:06        Salary Changes History          PEGD90     PEDD90


  8/01/1995 Employee     80008 TRUCKER,TOM E                         Reason CONTR
Pay Type H   Freq H Inc%  14.28   New Salary        11.0250  Comp Ratio 73.35
Incr Amt         0.5250  Q1 Job Code 700   Position 401700 Grade DRIVE


  8/01/1995 Employee     80008 TRUCKER,TOM E                         Reason CONTR
Pay Type H   Freq H Inc%  14.28   New Salary        11.0250  Comp Ratio 06.67
Incr Amt         4.9875  Q3 Job Code 700   Position 401700 Grade DRIVE


  8/15/1995 Employee     30015 COLLINS,TOM                           Reason ADJST
Pay Type S   Freq A Inc%  14.28   New Salary     50000.0000  Comp Ratio 25.50
Incr Amt     37520.0000  Q1 Job Code 160   Position 114160 Grade
                                                                             +



 F3=Exit   F10=Access
```

Figure 16-11: Salary Changes History screen

If there is more than one page of transactions, the system displays **+** in the lower right-hand corner of the screen. Press PageDown to view the additional transactions.

7 After you have viewed all of the employees' selected transactions, press Enter or F3 to return to the prompt screen shown in Figure 16-10 above.

Select additional transactions to display or press F3 to exit from this screen. The system displays the prompt screen shown in Figure 16-9 above.

8 Specify a new set of levels or press F3 to exit from this screen. The system displays the prompt screen shown in Figure 16-8.

Specify another employer or employee or press F3 to return to the Infinium HR main menu.

Using Display Work Actions

You use this display to view the work actions recorded for a particular employee or for a group of employees. The system displays information you entered using the work action transaction within the *Enter Personnel Actions* function.

Follow these steps to access the *Display Work Actions* function:

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

2 Select *Display Employee Data.*

3 Select *Display Work Actions* [DWA]. The system displays the screen shown in Figure 16-12.

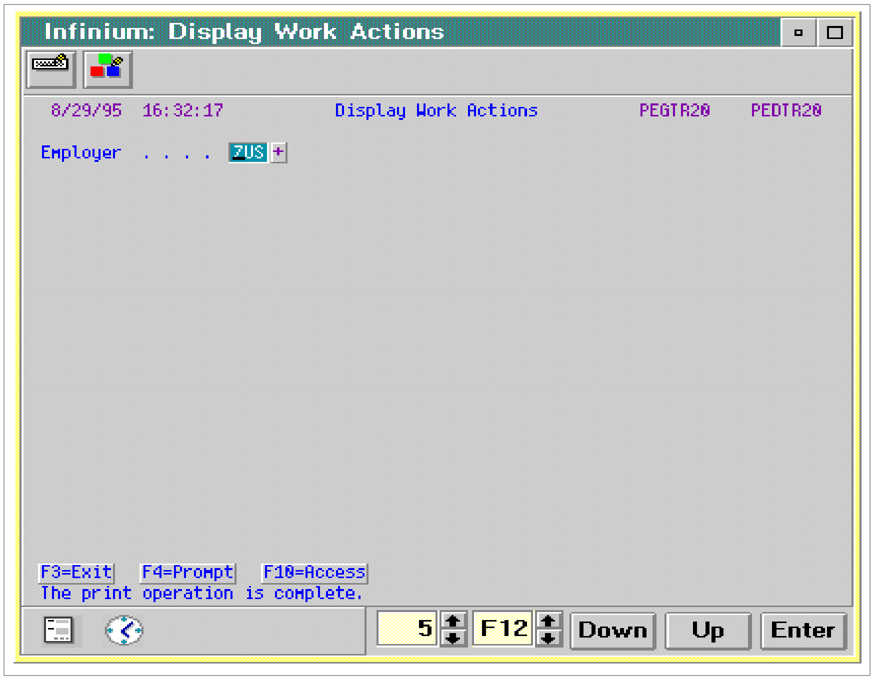


Figure 16-12: Display Work Actions prompt screen

4 Use the following information to complete the field on this screen:

You must specify an employer.

Employer

Type the code that identifies the employer for which you want to display work action history.

5 Press Enter. The system displays the screen shown in Figure 16-13.

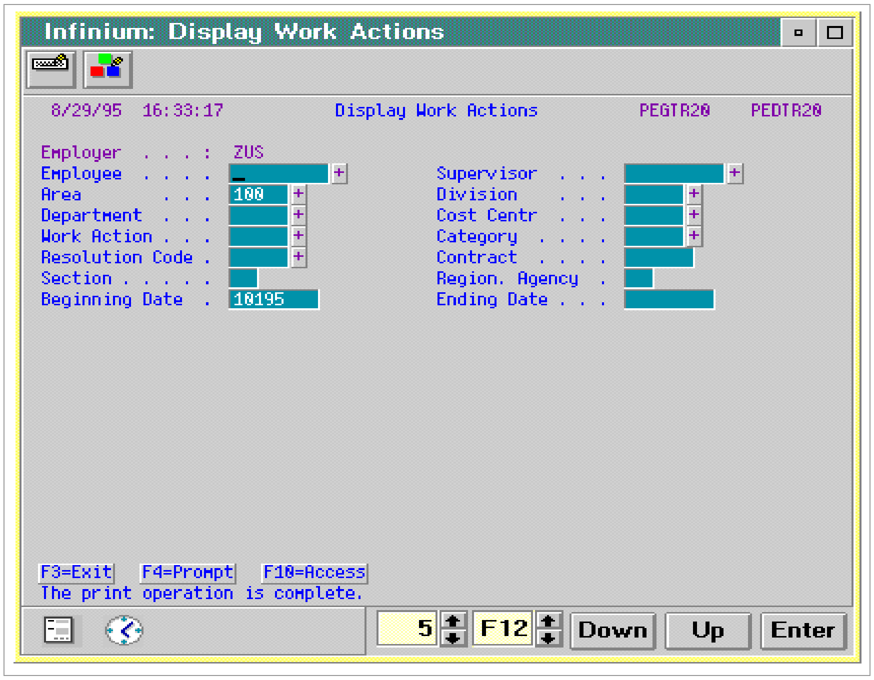


Figure 16-13: Display Work Actions screen

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

You can use this screen to restrict the type of work actions the system includes in the *Display Work Actions* display. You can fill in one or more fields in any combination to identify the work actions you want to view.

If you leave all of the fields blank and press Enter, the system includes all work actions for the specified employer in the display.

Employee

If you want to restrict the following display to shown only the work actions of a particular employee, type the employee's number. If you are not sure of the employee's number, press F4 to display the Employee Locate screen.

Type part or all of the employee's last name in the *Locate* field at the top of the screen, then press Enter. The system displays employees whose names match the name you typed. Type any character in the *Opt* field next to the employee whose work actions you want to display, then press Enter. The system displays the Display Work Actions screen with the *Employee* field filled in.

Press Enter to display work action history for the employee.

Leave this field blank if you want to display work actions for more than one employee.

Supervisor

If you want to restrict the following display to show only the work actions associated with a particular supervisor, type his or her number in this field. The system compares the number you type in this field to the number in the *Supervisor* field in each employee's work action transaction and only includes work actions associated with this supervisor. This is an optional field on the Work Action transaction screen.

If you are unsure of the supervisor's employee number, press F4 to display the Employee Locate screen.

Type part or all of the supervisor's last name in the *Locate* field at the top of the screen, then press Enter. The system displays employees whose names match the name you typed. Type any character in the *Opt* field next to the supervisor whose work actions you want to display, then press Enter. The system displays the Display Work Actions screen with the *Supervisor* field filled in.

Press Enter to display work action history associated with the supervisor.

Leave this field blank if you want to display work actions for more than one supervisor.

Levels

The system displays descriptions for the levels defined for the specified employer in the next four fields. Type a code that represents a particular level in one or more of the fields if you want to restrict the following display to include only employees assigned to the specified level(s).

Leave the level fields blank if you want to display work actions for employees regardless of their level assignment.

Work Action

If you want to restrict the following display to include only employees for whom you recorded certain types of work actions, type the code that identifies the work action in this field. You define values for this field using code type **GRV**. You must enter a work action code for each work action transaction that you enter through the *Enter Personnel Actions* function.

Leave this field blank if you want to view all types of work actions for employees.

Category

If you want to restrict the following display to include only employees for whom you recorded certain categories of work actions, type the code that identifies the work action category in this field. You define values for this field using code type **GTV**. This is an optional field on the Work Action transaction screen in the *Enter Personnel Actions* function.

Resolution Code

If you want to restrict the display to include only work actions that were resolved in a particular way, type the code that identifies the work action resolution code in this field. You define values for this field using code type **RES**. This is an optional field on the Work Action transaction screen in the *Enter Personnel Actions* function.

Contract

If you want to restrict the display to include only grievances associated with a particular contract, type the value that identifies the work action contract in this field. This is an optional field on the Work Actions transaction screen in the *Enter Personnel Actions* function.

Section

If you want to restrict the display to include only grievances associated with a particular section of a contract, type the value that identifies the contract section in this field. This is an optional field on the Work Actions transaction screen in the *Enter Personnel Actions* function.

Region. Agency

If you want to restrict the display to include only grievances associated with a regulatory agency, type the value that identifies the regulatory agency in this field. This is an optional field on the Work Actions transaction screen in the *Enter Personnel Actions* function.

Beginning Date

Type the date of the earliest work action transaction that you want to view. The system compares this date to the *Effective Date* field for each work action transaction in the employees' history and displays only those transactions that were effective on or after this date.

Leave this field blank if you want to view all of the employees' work action transactions without a beginning date restriction.

Ending date

Type the date of the most recent work action transactions that you want to view. The system compares this date to the *Effective Date* field for each work action transaction in the employees' history and displays only those transactions that were effective on or before this date.

Leave this field blank if you want to view all of the employees' work action transactions without an ending date restriction.

7 After you complete all of the appropriate fields on this screen, press Enter. The system displays the work action transactions that meet your specifications as shown in Figure 16-14.

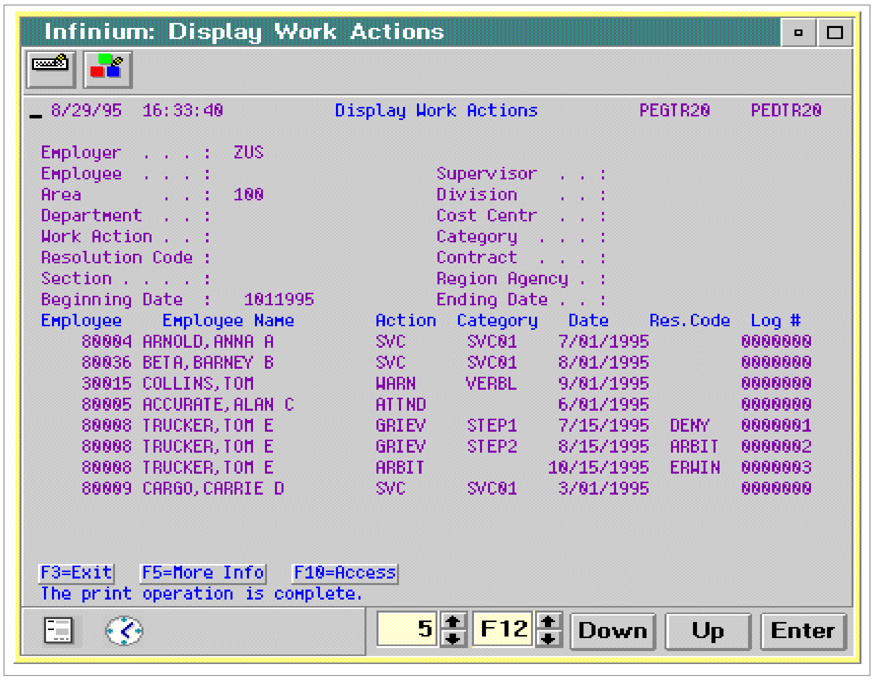


Figure 16-14: Display Work Actions screen

8 Use the following information to work with this screen:

The system displays key information for all work actions that meet your selection criteria.

Press F5 to display a description of the work action code value associated with each work action.

9 Press Enter or F3 to exit from this screen. The system displays the screen shown in Figure 16-13. Specify additional criteria or press F3 to exit from this screen.

10 The system displays the initial Display Work Actions prompt screen. Press F3 to return to the Infinium HR main menu.

Using Display Salary Changes

You use the Display Salary Changes display to view salary change transactions for a single employee or a group of employees. The system displays information you entered using the salary change transaction within the *Enter Personnel Actions* function.

Follow these steps to access the *Display Salary Changes* function:

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

2 Select *Display Employee Data.*

3 Select *Display Salary Changes* [DSC]. The system displays the screen shown in Figure 16-15.

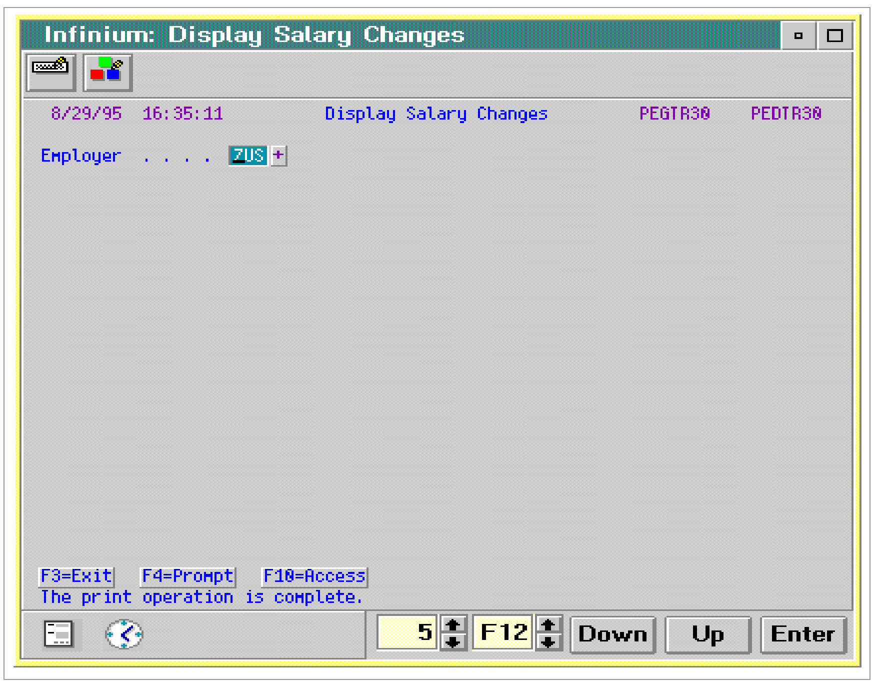


Figure 16-15: Display Salary Changes prompt screen

4 Use the following information to complete the field on this screen:

You must specify an employer.

Employer

Type the code that identifies the employer for which you want to display salary change history.

5 Press Enter. The system displays the screen shown in Figure 16-16.

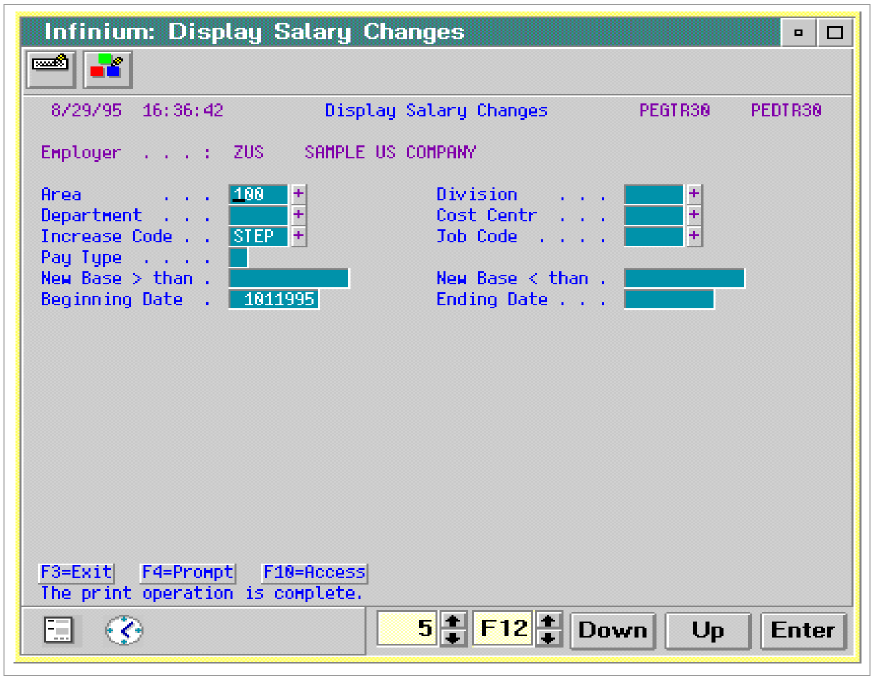


Figure 16-16: Display Salary Changes screen

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

You can use this screen to restrict the type of salary changes the system includes in the *Display Salary Changes* display. You can fill in one or more fields in any combination to identify the salary changes you want to view.

If you leave all of the fields blank and press Enter, the system includes all salary changes for the specified employer in the display.

Employee

If you want to restrict the following display to shown only the salary changes of a particular employee, type the employee's number. If you are not sure of the employee's number, press F4 to display the Employee Locate screen.

Type part or all of the employee's last name in the *Locate* field at the top of the screen, then press Enter. The system displays employees whose names match the name you typed. Type any character in the *Opt* field next to the employee whose salary change history you want to display, then press Enter.

The system displays the Display Salary Changes screen with the *Employee* field filled in.

Press Enter to display salary change history for the employee.

Leave this field blank if you want to display salary change history for more than one employee.

Levels

The system displays descriptions for the levels defined for the specified employer in the next four fields. Type a code that represents a particular level in one or more of the fields if you want to restrict the following display to include only employees assigned to the specified level(s).

Leave the level fields blank if you want to display salary changes for employees regardless of their level assignment.

Increase Code

If you want to restrict the information to include only employees for whom you recorded certain types of salary changes, type the code that identifies the salary change reason in this field. You define values for this field using code type **SAL**. You must enter a salary change reason code for each salary change transaction that you enter through the *Enter Personnel Actions* function.

Job Code

If you want to restrict the information to include only salary changes associated with employees in a particular job, type the code that identifies the job this field. Each salary change transaction includes the job to which the employee is assigned when the transaction is entered. Press F4 to display a list of valid job codes for the specified employer.

Pay Type

If you want to restrict the information to include only salary changes associated with employees assigned to a particular pay type, type the code that identifies the pay type this field. Each salary change transaction includes the pay type to which the employee is assigned when the transaction is entered. Valid values are:

H	Hourly employee
S	Salaried exempt employee
2	Salaried non-exempt employee

New Base > Than

If you want to restrict the information to include only salary changes associated with employees whose new base rate is equal to or greater than a specified value, type the value in this field. Each salary change transaction includes the employee’s new base rate; the base rate on the Salary Change transaction screen is used to update the employee’s *Base Rate* field in his or her basic data record.

New Base < Than

If you want to restrict the information to include only salary changes associated with employees whose new base rate is less than or equal to a specified value, type the value in this field. Each salary change transaction includes the employee’s new base rate; the base rate on the Salary Change transaction screen is used to update the employee’s *Base Rate* field in his or her basic data record.

Beginning Date

Type the date of the earliest salary change transaction that you want to view. The system compares this date to the *Effective Date* field for each salary change transaction in the employees’ history and displays only those transactions that were effective on or after this date.

Leave this field blank if you want to view all of the employees’ Salary Change transactions without a beginning date restriction.

Ending date

Type the date of the most recent salary change transactions that you want to view. The system compares this date to the *Effective Date* field for each salary change transaction in the employees’ history and displays only those transactions that were effective on or before this date.

Leave this field blank if you want to view all of the employees’ salary change transactions without an ending date restriction.

7 After you complete all of the appropriate fields on this screen, press Enter. The system displays the salary change transactions that meet your specifications as shown in Figure 16-17.

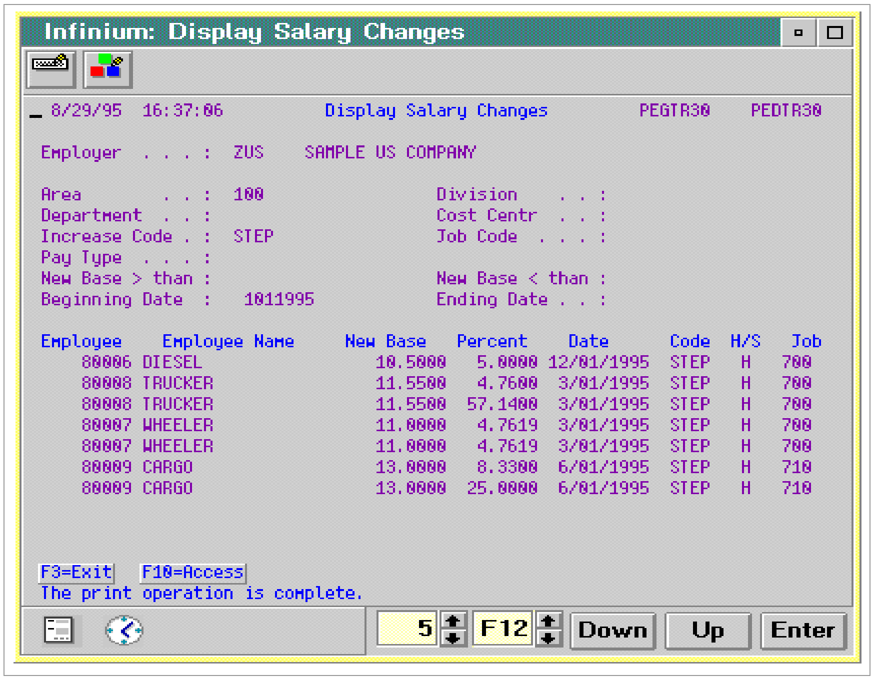


Figure 16-17: Display Salary Changes screen

8 Use the following information to interpret this screen:

The system displays a screen with key information from the selected salary change transactions including fields for each employee's *Base Rate, Salary Change Percent, Date of Salary Change, Salary Change Reason Code, Pay Type* and *Job Code.*

9 Press Enter or F3 to exit from this screen. The system displays the screen shown in Figure 16-16. Specify additional criteria or press F3 to exit from this screen.

10 The system displays the initial Display Salary Changes prompt screen. Press F3 to return to the Infinium HR main menu.

Using Display Next Review Schedules

You use the *Display Next Review Schedules* function to display the type and date of the next scheduled performance review for a single employee or a group of employees. The system uses information from the *Next Review* and *Next Review Date* fields in each employee's basic data record for this display. You update these fields when you enter a performance review transaction within the *Enter Personnel Actions* function.

Follow these steps to access the *Display Salary Changes* function:

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

2 Select *Display Employee Data.*

3 Select *Display Next Scheduled Reviews* [DNRS]. The system displays the screen shown in Figure 16-18.

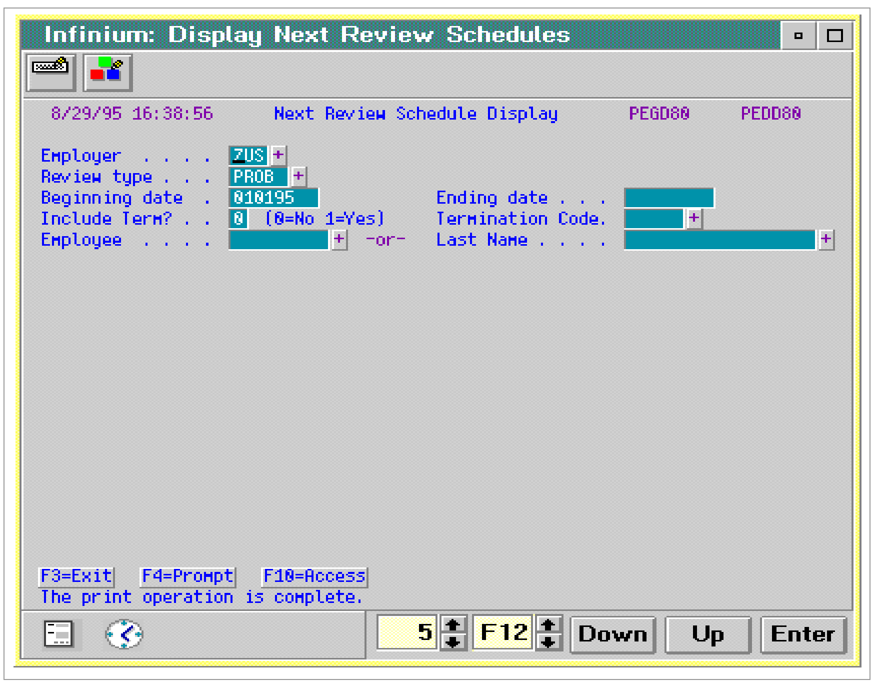


Figure 16-18: Next Review Schedule Display prompt screen

4 Use the following information to complete the field on this screen:

You can use this screen to restrict the type of performance reviews the system includes in the *Next Review Schedule Display* screen*.* You can fill in one or more fields in any combination to identify the scheduled performance reviews you want to view.

If you leave all of the fields blank and press Enter, the system includes all pending performance reviews for the specified employer in the display.

You must type a value in the *Employer* field.

Employer

Type the code that identifies the employer for which you want to display scheduled performance reviews. Press F4 to display a list of valid employer codes.

Review Type

If you want to restrict the information to a certain type of performance review, type the code that represents that type of performance review. You define values for this field using code type **RTP**.

The system compares the value you type in this field to the value in each employee's *Next Review* field in his or her basic data record and selects employees whose value matches the specified value.

Leave this field blank if you want to display any type of next scheduled performance review.

Beginning date

Type the earliest date of pending performance reviews that you want to view. The system compares this date to the *Next Review Date* field in each employee's basic data record and displays only those transactions that are scheduled for on or after this date.

Leave this field blank if you want to view all scheduled performance reviews without a beginning date restriction.

Ending date

Type the latest date of pending performance reviews that you want to view. The system compares this date to the *Next Review Date* field in each employee's basic data record and displays only those transactions that are scheduled for on or before this date.

Leave this field blank if you want to view all scheduled performance reviews without an ending date restriction.

Include Term?

Use this field to indicate if you want to include terminated employees in the Next Review Schedule Display screen. Valid values are:

0	No
1	Yes

Termination Code

If you want to include terminated employees in the following screen, use this field to restrict which types of terminated employees are included. Type a code value that identifies the termination reason. You define values for this field using code type **TRM**.

The system compares the value you type here to the value in the *Termination* field in each terminated employee's basic data record. The system fills this field when you enter a termination transaction in the *Enter Personnel Actions* function for an employee and removes the value from this field when you enter a rehire transaction for the same employee.

Employee

If you want to restrict the following display to shown only the scheduled performance review of a particular employee, type the employee's number. If you are not sure of the employee's number, press F4 to display the Employee Locate screen.

Type part or all of the employee's last name in the *Locate* field at the top of the screen, then press Enter. The system displays employees whose names match the name you typed. Type any character in the *Opt* field next to the employee whose scheduled performance review information you want to display, then press Enter. The system displays the Next Review Schedule Display screen with the *Employee* field filled in.

Press Enter to display the employee's next scheduled performance review information.

Leave this field blank if you want to display pending performance reviews for more than one employee.

5 After you complete all of the appropriate fields, press Enter. The system displays the screen shown in Figure 16-19.

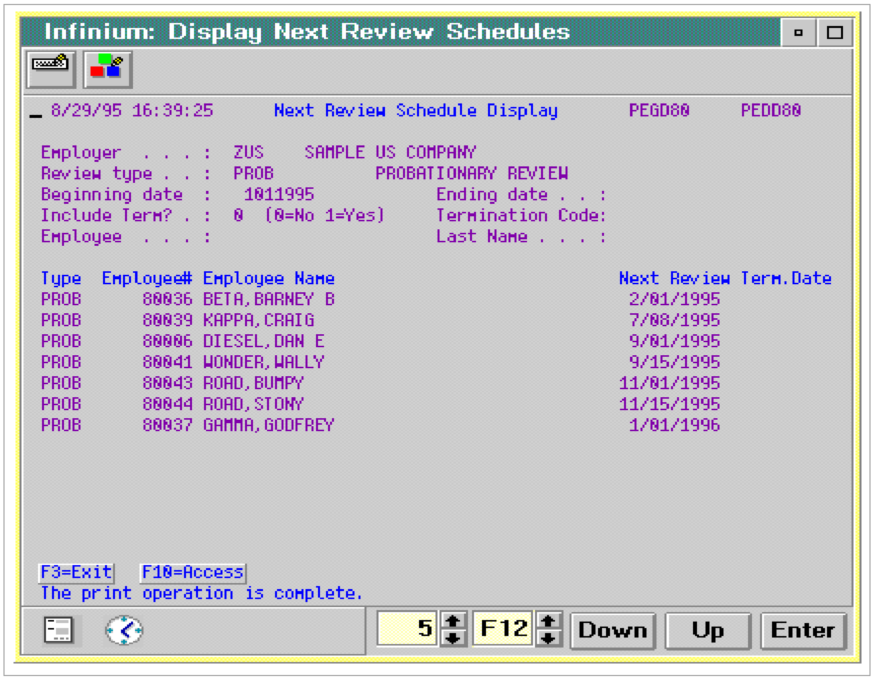


Figure 16-19: Next Review Schedule Display screen

6 Use the following information to review this screen:

The system displays a list of employees with their next scheduled review type and date. The list is sorted in order of the next review date, from earliest to most current.

If you elected to include terminated employees in the display, the system also displays the termination date of those employees.

7 Press Enter to return to the prompt screen shown in Figure 16-18. You can specify additional selection criteria on this screen or press F3 to return to the Infinium HR main menu.

Notes

Chapter 17 Printing Employee History Reports

17

This chapter describes the reports about employee history you can print.

You can generate ten standard reports in Infinium HR to review employee history transactions you entered through the *Enter Personnel Actions* function. These reports are useful for auditing the accuracy of the data input and enable you to review and analyze historical trends. You can also use the reports on a per pay period basis to communicate changes in employee information to payroll processors.

The “Printing Employee Data” chapter provides general information about producing standard reports of employee basic data, personnel data, education data, skills data and so on.

You can view samples of most of the reports in this chapter in the *Infinium HR Reports* book.

The chapter consists of the following topics:

Overview of List Employee Data History Reports

The following five reports within the *List Employee Data* function provide you with information on transactions you entered through the *Enter Personnel Actions* function:

- *List Next Review Data*
- *List PE Actions*
- *List PE Action Details*
- *List PE Actions by Levels*
- *List PE Actions by Employee*

Two of these reports, *List PE Actions* and *List PE Action Details*, are especially useful for audit purposes and communication with Infinium PY users.

The following table lists the history reports found within the *List Employee Data* function and provides 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 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.

Function	Selection Criteria	Comments
List Next Review Schedule [LNRS]	Employer, Levels, Next Review Code, Next Review Effective Date	Can sort by levels or position code. Uses *Next Review* and *Next Review Date* fields in basic data, which you update using the RE transaction in *Enter Personnel Actions*.
List PE Actions [LPA]	Employer, PE Action Transaction Code, Transaction Effective Date	Provides summary information on PE Actions; sorts by employee last name and lists all selected transaction for each employee.

Function	Selection Criteria	Comments
List PE Action Details [LPAD]	Employer, Levels, PE Action Transaction Code, Entered or Effective Date plus additional selection criteria for each transaction type.	Produces a separate report for each selected transaction; sorted by last name. Prints entered (input) date and effective date of each transaction.
List PE Actions by Levels [LPABL]	Employer, Levels, PE Action Transaction Code, Effective Date	Sorts by level, then last name; lists all selected transactions for each employee.
List PE Actions by Employee [LEH]	Employer, Employee Number	Lists summary information for all transactions for the specified employee.

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 table above.

Overview of Administrative Reporting History Reports

You can use the five history reports within this option to generate detail or summary listings of information about the following five personnel action transactions:

- Transfer
- Promotion
- Demotion
- Termination
- New Hire

The following table lists the history reports found in the *Employee History* option within the *Administrative Reporting* function and provides 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 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.

Function	Selection Criteria	Comments
List Transfer/Promotion/ Demotion [TPR]	Employer, Effective Date	Lists current and previous position information; sorts by last name and lists **TR**, **PR** and **DM** transactions for each employee.
List Terminations - Detail [TDR]	Employer, Effective Date, Levels, Termination Reason Code	Uses information from the **TE** transaction. Can sort by termination date and last name or by levels, termination date and last name. Can print up to 5 code types on last name version of report. Also computes length of service for each employee.
List Terminations - Summary [TSR]	Employer, Termination Date	Summary report sorted by termination reason code; does not identify specific employees.

Function	Selection Criteria	Comments
List New Hires - Detail [NHR]	Employer, Levels, Hire Date, Hire Source Code	Sort by hire date or hire date within levels; can print up to 5 code types in hire date version.
List New Hires - Summary [NHS]	Employer, Hire Date	Sorts by hire source code; no employee detail on report.

Follow these steps to access the reports shown in the preceding table:

1 From the Infinium HR main menu select *Administrative Reporting.*

2 Select *Employee History.*

3 Select any of the functions listed in the table above.

Notes

Chapter 18 Establishing Step-in-grade Processing

18

This chapter describes the step-in-grade process.

The chapter consists of the following topics:

Overview of Step-in-grade Process

You use step-in-grade processing to manage salary administration for employees who are paid standard rates that increase based on their length of service, hours worked, or a combination of both factors. To implement step-in-grade processing, you define pay grades and establish steps within each pay grade; for each step, you specify the number of months and/or hours to be worked before an employee can move to the next step. You can associate up to three pay rates with each step.

You typically use step-in-grade processing for those employees whose rate progression is based on a fixed schedule regardless of job performance considerations. You can, however, define off-scale steps for employees who are paid a special rate and freeze employees who should not progress due to other exception situations.

You use the *Mass Update Employee Steps* function in step-in-grade processing to automate the employee's movement through steps in his or her assigned pay grade. The system uses the length of service and/or hours worked requirements advance the employee from one step to the next in his or her assigned pay grade. It automatically updates the employee's personnel and payroll pay rates with the rates associated with the new step and records the rate changes in the employee's salary history.

You can use functions within step-in-grade processing to mass change step rates on pay grade controls and apply the rate changes to step-in-grade employees. The system creates salary change transactions in the *Enter Personnel Actions* function for all rate changes generated through step-in-grade processing enabling you to generate reports on employer history and to display history information.

Objectives

After completing this chapter, you should be familiar with how to:

- Understand step-in-grade processing
- Define pay grade controls
- Update job controls
- Assign new hires to pay grades
- Work with pay grade information in the employee basic data record

- Use personnel action transactions with step-in-grade employees
- Enter salary changes for step-in-grade employees
- Enter transfer, promotions and demotions for step-in-grade employees
- Enter inter-company transfers for step-in-grade employees
- Begin step-in-grade processing for an existing employer
- Use the *Mass Update Employee Positions* function
- Convert step-in-grade information during implementation

The “Using Step-in-grade Mass Update Functions” chapter provides information on how to use the three mass update functions within step-in-grade processing.

Understanding Step-in-grade Processing

You use step-in-grade processing to automate the rate progression of selected employees. You can use step-in-grade processing to manage compensation for some of your workforce and use other methods of salary administration, such as a merit program, for other employees.

To implement step-in-grade processing, you first establish pay grade controls that define how many steps are in each pay grade. You can define up to 99 steps per pay grade. You associate up to three rates with each step. You can use these rates to update the employee's base rate in basic data record as well as his or her rates in the payroll data record. You specify the length of time and/or number of hours employees must work in their current step before they can progress to the next step.

When you use the *Mass Update Employee Steps* function, the system uses criteria on the pay grade controls and information in the employee's basic data record to advance employees to their next step and update their personnel and payroll rates.

Pay grades are linked to jobs, and jobs are associated with positions. Employees are initially assigned to positions when you use the *Enter New Hire* function. You use the transfer, promotion, demotion and rehire transactions in the *Enter Personnel Actions* function to move employees to new positions.

When you assign the employee to a position associated with a step-in-grade job, you place the employee on a starting step in the pay grade. You use the *Mass Update Employee Steps* function to move the employee from the starting step to the next step and so on.

The system uses or updates the following fields in employee records when you run the *Mass Update Employee Steps* function:

The system uses these fields…	On this screen…	During the *Mass Update Employee Steps* function to
Pay Grade *Pay Grade Date* *Step* *Step Date* *Freeze Step?* *Step Override?* *Next Step* *Next Step Date*	Basic Data Screen 4	Determine which employees advance to their next step; Update the employee's new *Step* and *Next Step* information.
Base Rate *Last Increase* *Increase Reason* *Last Increase %* *Last Increase Amt* *Previous Rate* *Salary Quartile* *Comp Ratio*		Update these fields based on the employee's advancement to his or her next step.
Pay Rate *2nd Pay Rate* *3rd Pay Rate*	Payroll Data Screen 1	Update fields based on the employee's new step.

Defining Pay Grade Controls

You must define pay grade controls before you can use step-in-grade processing. You can define as many pay grades as you need. Each employee is assigned to one pay grade at a time.

For example, you hire an employee into a position associated with pay grade **DRIVE**. You advance the employee through the steps in this pay grade until he is promoted to a new position associated with pay grade **DISP**. You assign him to a step in the new pay grade and he advances through the steps in the new pay grade.

You define from 1 to 99 steps in each pay grade. For each step, you establish criteria that controls how the system advances the employee to the next step. You can specify length of service, hours worked, or a combination of both factors. Each employee is assigned to a current step and a next step.

In addition, you associate up to three pay rates with each step. A step-in-grade-employee's rate(s) of pay normally matches the rate(s) defined for the step to which he or she is currently assigned. Temporary exceptions to this rule can occur when the employee transfers to a new position and as a result is assigned to a new pay grade and step. Details about this situation are described below.

When you run the *Mass Update Employee Steps* function, the system uses the first step rate on the pay grade control to automatically update the employee's *Base Rate* field in his or her basic data record. If Infinium HR users have the authority to update Infinium PY rates, you can also have the system update rates in the employee's payroll data record as shown in the following table.

These fields on the pay grade control…	Update this field in basic data…	And these fields in payroll data…
Pay Rate 1	*Base Rate*	*Pay Rate*
Pay Rate 2		*2nd Pay Rate*
Pay Rate 3		*3rd Pay Rate*

Follow these steps to define a pay grade control.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Update Step Data.*

3 Select *Update Pay Grade and Steps* [UPG]. The system displays the screen shown in Figure 18-1.

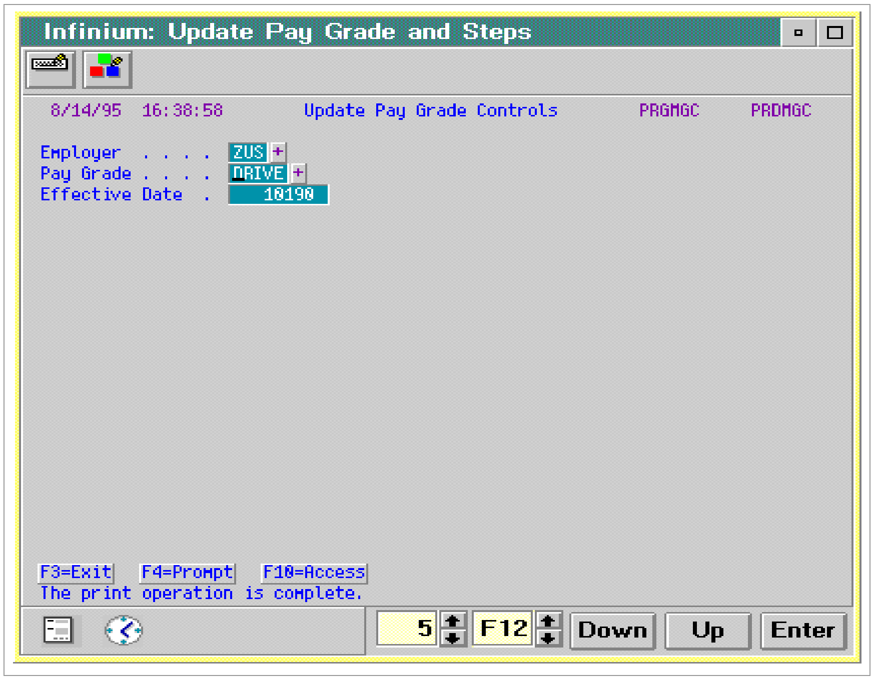


Figure 18-1: Update Pay Grade Controls prompt screen

4 Use the following information to fill in the fields on this screen:

You must type information in all three fields.

You can establish the same pay grade with different effective dates. The system selects the appropriate pay grade for the employee by doing one of the following:

- Compares the effective date of the pay grade to the hire date of a new employee and selects the pay grade that is effective on or before the employee's hire date.
- Compares the effective dates of Personnel Actions that affect the employee's position assignment (such as Transfer, Promotion, Demotion and Rehire) and selects the pay grade that is effective on or before the transaction effective date.

For example, you establish two pay grades named **DRIVE**, one with an effective date of 1-1-90 and the other with an effective date of 1-1-93. Each grade has different steps and rates. When you hire an employee into a position associated with this pay grade whose hire date is between 1-1-90 and 12-31-92, the system uses step information from the 1-1-90 **DRIVE** pay grade table for that employee. If you hire an employee with a hire date on or after 1-1-93, the system uses step information from the 1-1-93 **DRIVE** pay grade table.

In this example, if you hire an employee with a hire date prior to 1-1-90 the system generates an error message during the *Enter New Hire* function indicating that it cannot locate pay grade information for the specified hire date. The system cannot correctly apply step-in-grade processing to this employee unless you establish another **DRIVE** pay grade with an effective date that is the same as or prior to this employee's date of hire.

Therefore, when you first implement Infinium HR or when you implement step-in-grade processing after you are live on Infinium HR, you must define an effective date for each pay grade that precedes the earliest hire date of employees in the pay grade.

Employer

Type the value that identifies the employer within which you are establishing a pay grade. Press F4 to display a list of valid values.

Pay Grade

Type the code that identifies the pay grade you are defining. This is a 5-character alphanumeric field. You can use all letters, all numbers or any combination of letters and numbers to define pay grade codes; the code can be from 1 to 5 characters in length.

Effective Date

Type the date this pay grade takes effect. Ensure that you specify a date that precedes the hire date of employees that you plan to assign to this pay grade.

5 After you fill in all three fields, press Enter. The system displays the screen shown in Figure 18-2.

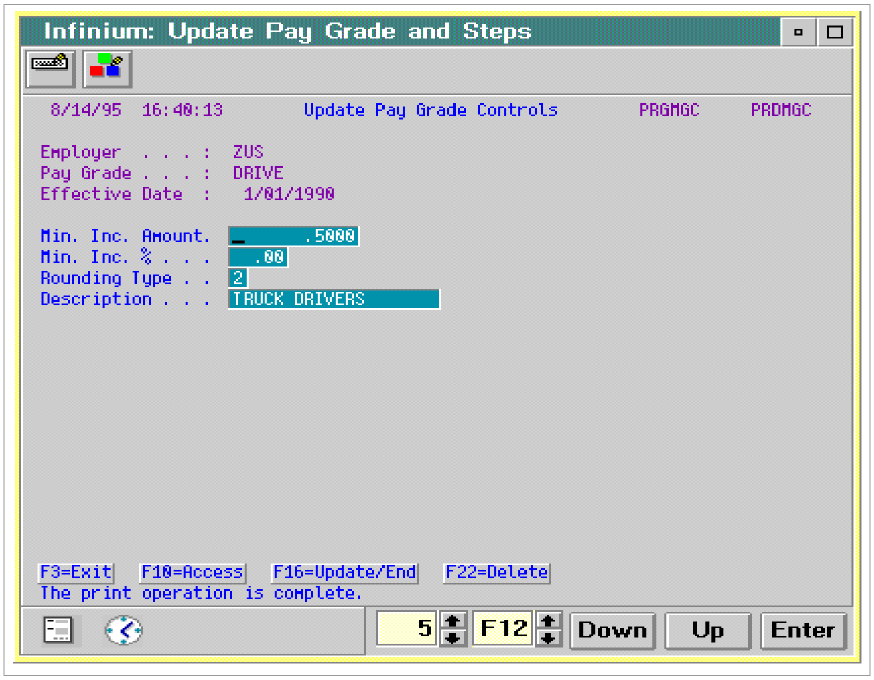


Figure 18-2: Update Pay Grade Controls screen

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

You use this screen to define how the system assigns employees to steps and rates when they move into a new pay grade after they are hired. You can specify that employees entering a new pay grade after they are hired receive a minimum increase amount or a minimum increase percentage over their current base rate.

You use the transfer, promotion, demotion and rehire transactions in the *Enter Personnel Actions* function to move employees from one position to another. If the new position is associated with a step-in-grade job, the system automatically assigns the employee to the pay grade and uses the criteria you specify on this screen to select the appropriate step in the new pay grade for the employee.

You must type information in the *Rounding Type* and *Description* fields.

Min. Inc. Amount

Type the minimum base rate increase an employee who moves into this pay grade receives. If you type **2** in the *Rounding Type* field, the system adds at least this minimum amount to the employee's current base rate and then assigns the employee to the step whose *Pay Rate 1* value is equal to or higher than the computed rate. If you use this field, you cannot use the *Min. Inc. %* field.

If you leave this field blank, the system uses the employee's current rate and the value in the *Rounding Type* field to determine his or her step in the new pay grade.

Min. Inc. %

Type the minimum percentage base rate increase an employee who moves into this pay grade receives. If you type **2** in the *Rounding Type* field, the system adds at least this minimum percentage increase amount to the employee's current base rate and then assigns the employee to the step whose *Pay Rate 1* value is equal to or higher than the computed rate. If you use this field, you cannot use the *Min. Inc. Amount* field.

If you leave this field blank, the system uses the employee's current rate and the value in the *Rounding Type* field to determine his or her step in the new pay grade.

Rounding Type

Type the value that indicates how the system calculates the employee's base rate and selects the employee's step in the new pay grade. The system uses this field when you enter a transfer, promotion, demotion or rehire transaction that moves the employee to a position associated with a pay grade that is new for the employee. The system uses this value to determine the employee's new base rate, and then uses that rate to assign the employee to a step on the new pay grade.

When you enter a transfer, promotion, demotion or rehire transaction to move an employee to a new position associated with a new pay grade, the system compares the employee's current *Base Rate* in the basic data record to the rates stored in the *Pay Rate 1* field for steps in the new pay grade. If the employee's current base rate matches a value in the *Pay Rate 1* field associated with a step on the new pay grade, the system selects that step for the employee. If the employee's current base rate does not match the *Pay Rate 1* value associated with any of the steps on the new pay grade, the system uses the *Rounding Type* field to select the most appropriate step in the new pay grade.

Valid values for this field are:

1 Round Down: The system assigns the employee to a step whose rate is the next lower rate compared to the employee's current base pay rate. The system does not apply the minimum increase amount or percentage.

2 Round Up: The system assigns the employee to a step whose rate is the next higher rate compared to the employee's current base pay rate. The system first uses the specified minimum increase amount or percentage to calculate the employee's new rate. If the system cannot find a step on the new pay grade whose *Pay Rate 1* matches the calculated rate, it rounds the employee's rate up further to match to the next higher rate on the pay grade control.

3 No Rounding: The system assigns the employee to the step whose rate is closest to the employee's current base rate but does not change the employee's rate as a result of assignment to the new pay grade. The system does not apply the minimum increase amount or percentage. Later, when the employee moves to his or her next step in the new pay grade, the system aligns his or her rate with the rate associated with the next step.

The following example illustrates the way the system uses the information on this screen to calculate the employee's new base rate and select his or her step on a new pay grade. Use the pay grade definition below for this example.

Step	Rate
1	$5.00
2	$7.00
3	$9.00

In this example, the minimum increase amount specified on the pay grade control is $.50. Assume that you transfer an employee to a position associated with this pay grade, which is new to the employee. His or her current rate is $5.25. The system selects different rates and steps in the pay grade for the employee depending on the value in the *Rounding Type* field.

Rounding Type	New Rate	New Step
1 (Round Down)	$5.00	1
2 (Round Up)	$7.00	2
3 (No Rounding)	$5.25	1

Description

Type a title or description of the pay grade. This is a 20-character free-form field that does not require pre-defined values.

7 Press Enter. The system saves the information on this screen and displays the Update Pay Grade Steps screen shown in Figure 18-3.

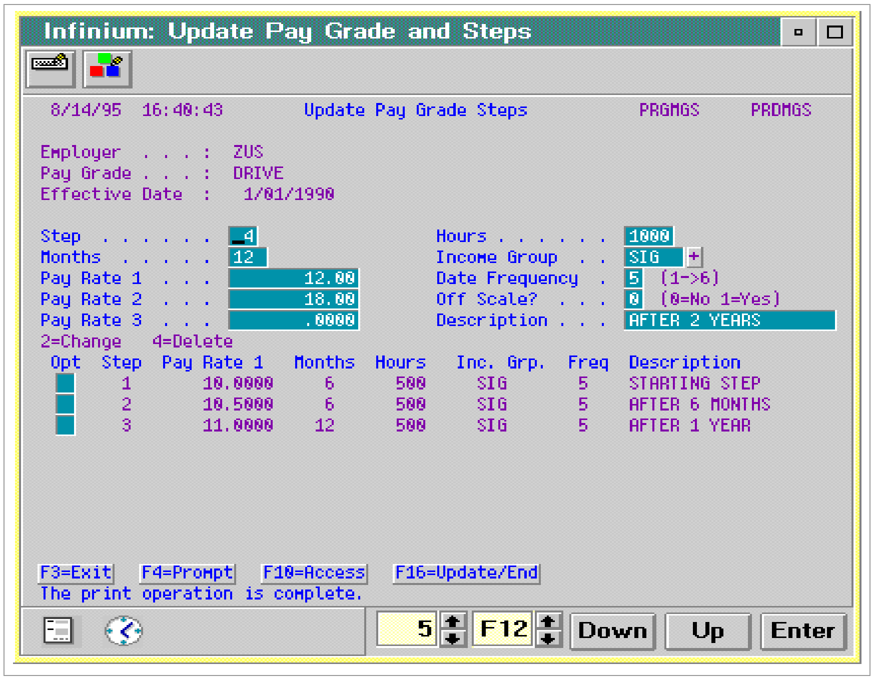


Figure 18-3: Update Pay Grade Steps screen

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

You use this screen to establish steps in the specified pay grade. You can define up to 99 steps in a pay grade and they must be numbered sequentially. For example, you can define steps 1, 2, 3, 4, and 5.

For each step, you define the length of service and/or hours an employee must work before he or she can move to the next step. You must define at least one pay rate for each step, which the system uses to update the employee's base rate in the basic data record. If you are authorized to update payroll rates, the system can also update payroll rate(s).

You must type information in the *Step* and *Date Frequency* fields for all steps. You must enter a rate in the *Pay Rate 1* field for all steps except off-scale steps (see below for details.) You must also type information in either the *Hours* field or the *Months* field for all steps. If you use the *Hours* field, you must also enter a value in the *Income Group* field.

Step

Type the number associated with the first or lowest step in this pay grade. This is a 2-digit field.

Hours

If the employee must work a specified number of hours before he or she can progress to the next step, type the number of hours in this field. If you make an entry in this field, you must also type a value in the *Income Group* field. If you do not have an hours worked requirement, leave this field blank.

When you run the *Mass Update Employee Steps* function, the system reviews the hours in the employee's check history on Infinium PY to determine if he or she has satisfied the hours requirement. You use the *Income Group* field to identify the specific incomes defined on Infinium PY that apply this requirement.

Months

If the employee must work a specified number of months before he or she can progress to the next step, type the number of months in this field. If you do not have a length of service requirement, leave this field blank.

If you type information in both the *Hours* and *Months* fields on a particular step, the employees assigned to this step must satisfy both requirements before the system can progress them to the next step.

Income Group

Type the code value that identifies the group of incomes that fulfill the specified hours requirement. You use code type **IRG** to name income reporting groups. On Infinium PY, you use the *Update Income Reporting Groups* function to identify the income codes for each group.

For example, your rate progression policy states that only worked hours apply to the step requirement. On Infinium PY, users have defined 25 incomes: 15 incomes are used to pay employees for time actually worked; 10 are used to pay employees for non-worked time such as holidays, vacations, sick time, premium pay, bonuses and so on. You name the income reporting group **WORK** and include the 15 worked incomes in the group. The system counts hours from only these fifteen incomes to determine when to move the employee to his or her next step.

Pay Rate 1

Type the base rate that applies to employees on this step. The system uses this rate to update the *Base Rate* field in the basic data record. If you have authority to update payroll rates, this rate can also be used to update the *Pay Rate* field in the payroll data record.

If you use Benefits Administration to establish a life insurance plan in which the coverage amount is a multiple of base pay, the system uses the *Base Rate* field in basic data to compute the value of life insurance coverage.

Although Infinium PY users have many options for locating payroll rates, they typically use the *Pay Rate* field in payroll data to calculate regular incomes.

If you use the *Mass Update Employee Steps* function to update payroll rates, the rate you type here must conform to the rate you enter in the *Pay Rate* field for step-in-grade employees in Infinium PY. For example, if step-in-grade employees are paid with hourly incomes that utilize the *Pay Rate* field on Infinium PY, you must type an hourly pay rate here.

Date Frequency

Type the value that identifies the date the system uses to apply the hours and/or months requirements specified in the *Hours* and *Months* fields. The system uses this date as a starting point from which to compute the hours or months an employee has worked toward the requirements.

Valid values are:

1	Date of hire
2	Adjusted date of hire
3	Job seniority date
4	Date of entry into current pay grade
5	Date of entry into current step
6	Union eligibility date

For example, you specify that employees on Step 1 of a particular pay grade must work 10 months and 1000 hours from their date of entry into this step before they can advance to Step 2. If an employee’s current step date is 6-30-95, he or she cannot advance to Step 2 until on or after 4-30-96. In addition, he or she must have worked a total of at least 1000 hours of specified incomes in checks with period ending dates between 6-30-95 and the *As of Date* field entry specified on the Mass Update Employee Steps selection screen.

The system verifies the employee’s hours worked on Infinium PY when you run the *Mass Update Employee Steps* function. In this example, when you run the *Mass Update Employee Steps* function with an effective date that is equal to or greater than 4-30-96 and the employee has accumulated 1000 hours in his or her income history since 6-30-95, the system advances the employee to Step 2.

The table below identifies the location in the system of the dates indicated above.

Value and Related Field Name	Location of Field	Comments
1 *Date of Hire*	Basic Data, Screen 1	The system updates this field when you use the *Enter New Hire* function.
2 *Adjusted D.O.H.*	Basic Data, Screen 1	You manually update this field.
3 *Seniority Date*	Basic Data, Screen 2	Refers to the first *Seniority Date* field, which the system automatically updates when you enter personnel action transactions that change an employee's job.
4 *Pay Grade Date*	Basic Data, Screen 4	Updated by the system when you use the *Enter New Hire* or *Enter Personnel Actions* functions to move an employee to a step-in-grade job. For new employees, this date equals their hire date. For others, this date equals the effective date of the transfer, promotion, rehire or demotion transaction that places them in the step-in-grade job.
5 *Step Date*	Basic Data, Screen 4	Updated by the system when you use the *Enter New Hire* or *Enter Personnel Actions* functions to move an employee to a step-in-grade job. (See Pay Grade Date comments.)
6 *Union Elig. Date*	Basic Data, Screen 2	You manually update this field.

You can choose different date frequencies for steps within the same pay grade. For example, you can type **1** in the *Date Frequency* field for Step 1 and **5** for all other steps.

Pay Rate 2

Type the second pay rate that applies to employees on this step. The system uses this rate to update the *2nd Pay Rate* field in the payroll data record under the following conditions:

- You have authority to update payroll rates

- When you run the *Mass Update Employee Steps* function, you indicate that the system should update payroll rates

You should coordinate with payroll users to determine which income controls on Infinium PY use the *2nd Pay Rate* field. Leave this field blank if payroll users do not use this field to calculate employee incomes.

Pay Rate 3

Type the third pay rate that applies to employees on this step. The system uses this rate to update the *3rd Pay Rate* field in the payroll data record under the following conditions:

- You have authority to update payroll rates
- When you run the *Mass Update Employee Steps* function, you indicate that the system should update payroll rates

You should coordinate with payroll users to determine which income controls on Infinium PY use the *3rd Pay Rate* field. Leave this field blank if payroll users do not use this field to calculate employee incomes.

Off Scale?

Use this field to identify an exception step that does not apply to most employees in this pay grade. You must manually assign employees to this step. The system does not automatically move employees to this step when you run the *Mass Update Employee Steps* function nor does it update the rate(s) associated with this step when you use the *Mass Update Step Rates* function.

You do not need to associate pay rates with an off-scale step, although you can if you want to.

A common situation where you might find the off-scale step helpful is with employees who are red-circled at a special rate that is not normally part of the pay grade to which they are assigned. After you define the off-scale step on the pay grade control, you use the salary change transaction in the *Enter Personnel Actions* function to assign the employee to the off-scale step. You can type unique pay rates for the employee because the system does not validate the rate you type on the Salary Change screen against rates associated with the step on the pay grade control.

Description

Type a description of the step. This is a 20-character free-form field that does not require pre-defined values. The system displays this description when you press F4 on the *Step* field in the salary change transaction in the *Enter Personnel Actions* function.

9 After you have completed all of the fields necessary for the step, press Enter. The system stores the information in the sub-file at the bottom of this screen.

Repeat steps 7 and 8 as many times as necessary to define all of the steps for the specified grade.

10 After you define all of the steps, press F16. The system saves your information and displays the Update Pay Grade Controls screen. Press F16 again to save your information.

The system displays the Update Pay Grade Controls prompt screen. You can enter another pay grade or press F3 to return to the Infinium HR main menu.

Updating Job Controls

After you establish the pay grade control, you link it to the jobs to which it applies. When you assign the employee to a position, he or she is also automatically assigned to a job. If the job is associated with a pay grade, the system uses the information on the job control to assign the employee to the pay grade and appropriate step within the grade.

This section assumes that you have already established job controls and only addresses how to associate a pay grade with an established job control. See the *Infinium HR Guide to Controls* for complete information on how to define a job control record.

Follow these steps to update a job control record.

1 From the Infinium HR main menu select *Master Files.*

2 Select *Update Master Files.*

3 Select *Update Job Controls* [UJ]. The system displays the screen shown in Figure 18-4.

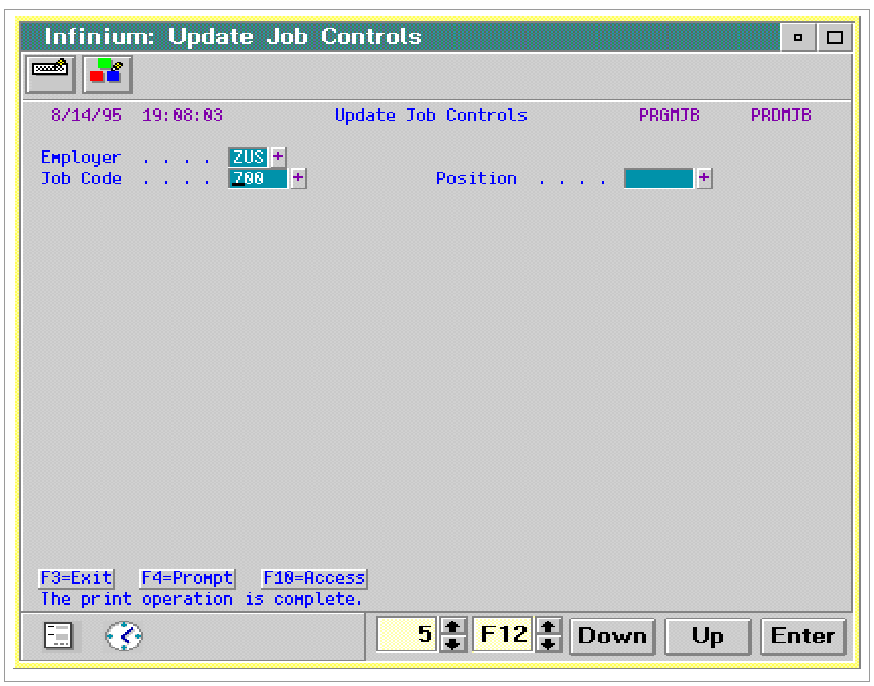


Figure 18-4: Update Job Controls prompt screen

4 Use the following information to fill in the fields on this screen:

The *Employer* and *Job Code* are required fields. You can also type a position to specify a unique job and position combination, known as a tie-back position. See the *Infinium HR Guide to Controls* for details on how to create a unique version of a job for a specified position.

Employer

Type the code that identifies the employer within which you are linking pay grades to job controls. Press F4 to display a list of valid employer codes.

Job Code

Type the code that represents the job control to which you are linking a pay grade. Press F4 to display a list of valid job codes. See the *Infinium HR Guide to Controls* for complete details on how to establish job controls.

Position

If you have defined unique job and position combinations, type the code that identifies the position that is associated with the specified job code. If you do not use tie-back positions, leave this field blank.

5 Press Enter. The system displays the screen shown in Figure 18-5.

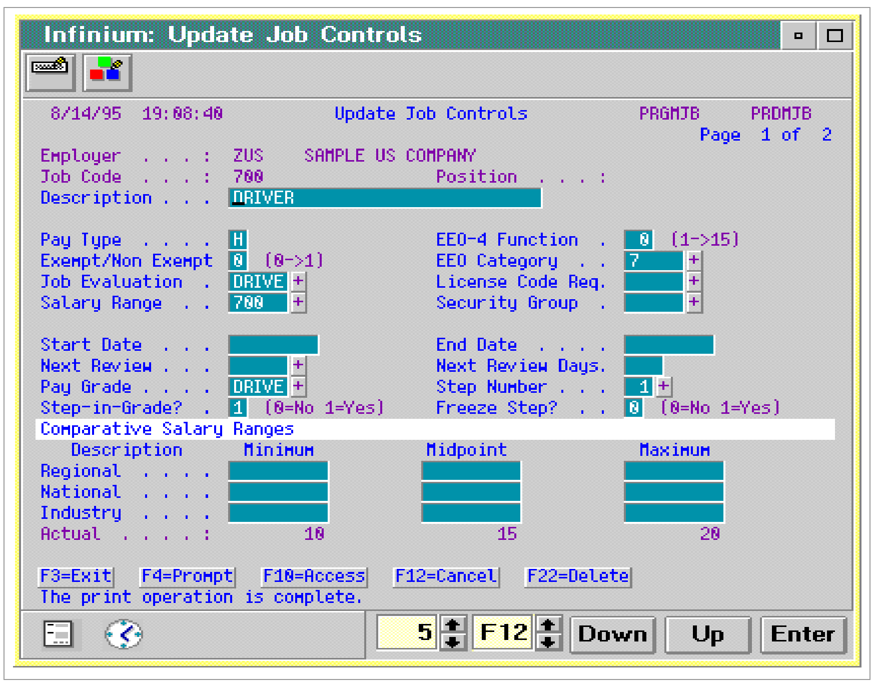


Figure 18-5: Update Job Controls screen

6 Use the following information to complete the step-in-grade related fields on this screen. See the *Infinium HR Guide to Controls* for information on how to fill the other fields on this screen.

To associate a pay grade with this job, you must type information in the *Pay Grade, Step Number, Step-in-Grade?* and *Freeze Step?* fields.

Pay Grade

Type the code that identifies the pay grade that is associated with this job. Press F4 to display a list of valid pay grades. See the previous “Defining Pay Grade Controls” section for information on how to establish the pay grade code.

When you assign employees to a position associated with this job, the system automatically assigns the employee to the pay grade you enter here.

Step Number

Type the step number that the system automatically assigns to employees during the *Enter New Hire* function. You can override this step number during the *Enter New Hire* function if you hire an experienced employee who should start at a higher step.

Step-in-Grade?

Use this field to indicate to the system that you use step-in-grade processing to administer the pay progression of employees assigned to this job.

When you type **1** in this field, the system automatically assigns employees to the specified pay grade and appropriate step when you use the *Enter New Hire* and *Enter Personnel Actions* functions. The system automatically advances employees in a step-in-grade job from their current step to the next step in the specified pay grade when you run the *Mass Update Employee Steps* function.

If you type **0** this field, the system uses the name of the field on the job control and employee basic data record for informational purposes only. During the *Enter New Hire* function, the system assigns the new hire to the pay grade, but does not assign him or her to a step and rate on the pay grade. Likewise, for non-step-in-grade jobs the system does not automatically advance the employee from one step to the next during the *Mass Update Employee Steps* function.

Valid values for this field are:

0	Do not include employees assigned to this job in step-in-grade processing.
1	Include employees assigned to this job in step-in-grade processing.

Freeze Step?

Use this field to indicate if the system progresses new employees to their next step when you run the *Mass Update Employee Steps* function. If you type **1** in this field, during the *Enter New Hire* function, the system sets the value in the *Freeze Step?* field in the new employees' basic data record to **1**, which freezes them at their starting step in the pay grade.

This field does not freeze the step of current employees whom you assign to this job using the *Enter Personnel Actions* functions.

Valid values are:

0	Allow new employees to advance to the next step in their assigned pay grade.
1	Do not allow new employees to advance to the next step in their assignment pay grade.

You can override the *Freeze Step?* field in the basic data records of individual employees as needed.

7 Press Enter. The system displays the second screen of the *Update Job Control* function. Press Enter to save your changes to the job control.

The system displays the Update Job Control prompt screen. Type the code of another job with which you want to associate a pay grade or press F3 to return to the Infinium HR main menu.

Assigning New Hires to Pay Grades

You use the *Enter New Hire* function to assign new employees to step-in-grade processing. When you hire the employee into a position that is linked to a job associated with a pay grade, the employee is automatically assigned to the pay grade. The system selects the step you specify in the *Step Number* field on the job control record for the employee's starting step unless you type over that value with another step number.

After the employee is hired, you use the *Mass Update Employee Steps* function to advance the employee from his or her starting step to the higher steps in the pay grade.

In this section you only learn about the fields in the *Enter New Hire* function that impact step-in-grade processing. See the preceding parts on Entering New Hires for complete information on how to use the *Enter New Hire* function.

Follow these steps to access the *Enter New Hire* function.

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

2 Select *Update Employee Data.*

3 Select *Enter New Hires* [HIRE]. The system displays the screen shown in Figure 18-6.

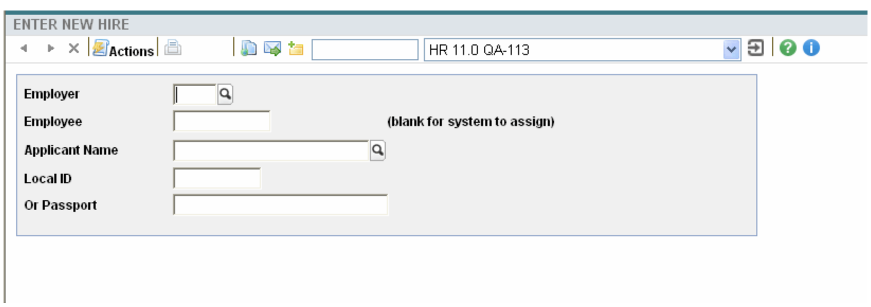


Figure 18-6: Enter New Hire prompt screen

4 Use the following information to fill in the fields on this screen:

The *Employer* field is required.

Type the appropriate employee number in the *Employee* field or leave the field blank to have the system assign an employee number.

Type the applicant name if the employee is to be hired from existing applicant files.

5 Press Enter. The system displays the first screen of the *Enter New Hire* function as shown in Figure 18-7.

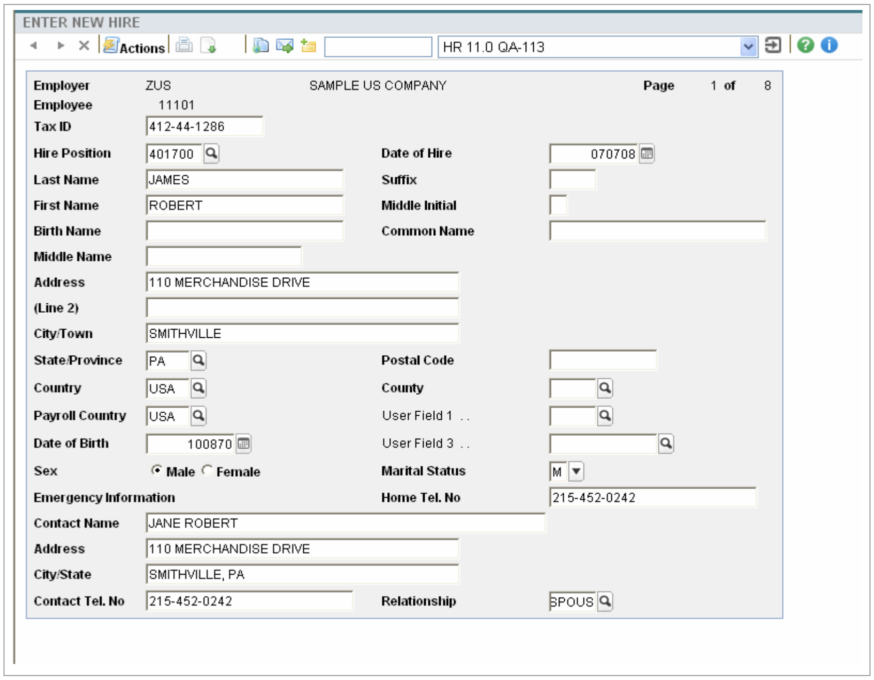


Figure 18-7: Enter New Hire screen 1 of 8

6 Use the following information to complete the fields on this screen. See the parts on Entering New Hires for complete information on how to fill in the fields on this screen.

The *Tax ID, Hire Position, Date of Hire, Last Name, First Name, Address, City/Town, State/Province, Date of Birth, Sex* and *Marital Status* fields are required.

Use the *Hire Position* field to type the code that identifies the position into which you are hiring the employee. The system uses information on the job code associated with this position to fill in the step-in-grade processing fields on the next screen if:

- The hiring position is associated with a job control that is linked to a pay grade
- The *Step-in-Grade?* field on the job control record associated with the hiring position is **1**, indicating that employees assigned to this position participate in step-in-grade processing functions

7 After you complete the rest of the fields you use on this screen, press Enter. The system displays the second screen of the *Enter New Hire* function and fills in the fields that are associated with step-in-grade processing as shown in Figure 18-8.

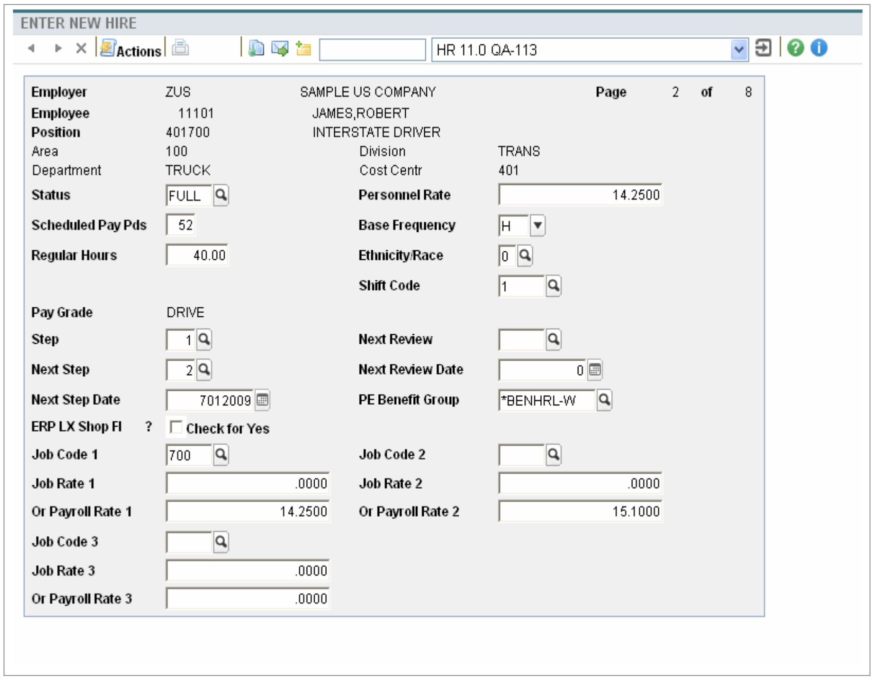


Figure 18-8: Enter New Hire screen 2 of 8

8 Use the following information to fill in and interpret the fields related to step-in-grade processing on this screen. Only the step-in-grade processing fields are discussed here. See the parts on Entering New Hires for complete information on how to fill in the fields on this screen.

When you assign the new employee to a position associated with a step-in-grade job, the system uses information on the job control and pay grade control associated with the hiring position to fill in the following fields on this screen:

- *Personnel Rate*
- *Pay Grade*
- *Step*
- *Next Step*
- *Next Step Date* - if you specify months of service criteria on the pay grade control record
- *Job Code 1*
- *Payroll Rate(s)*

You can override the default information in these fields if necessary. Use the following information to work with these fields.

Personnel Rate

The system uses the rate you type in the *Pay Rate 1* field on the pay grade control record to fill in this field. You can replace this rate with a different rate; however the system generates the following warning message if the rate you type does not agree with the rate defined for the employee's step on the pay grade control:

Base rate does not equal step rate, use F21 to override.

Base Frequency

Type the frequency that identifies how the system interprets the value in the *Personnel Rate* field.

Select from one of the following valid values:

H	Hourly
D	Daily
W	Weekly
B	Biweekly
S	Semimonthly
M	Monthly
A	Annually
10	10 pay periods per year
13	13 pay period 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 pay grade linked to the job control associated with the employee's assigned position. You can replace the default pay grade with a different pay grade.

Step

The system displays the employee’s starting step in his or her assigned pay grade. This step defaults from the *Step Number* field on the employee’s assigned job control record.

You can replace the default step with a different step on the pay grade. For example, when you hire experienced employees, you may start them one step higher than the default step, which is used for inexperienced new hires. 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.

The system compares the rate for the specified step with the rate you type in the *Personnel Rate* field. Generally, the *Pay Rate 1* value on the pay grade control record should match the values in the *Personnel Rate* and *Payroll Rate 1* fields on this screen.

Next Step

Specify a value to override the next step that defaults from the pay grade associated with the employee’s assigned job.

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 or not you override this value, 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

If months of service are associated with the employee’s starting step shown in the *Step* field, the system displays the date the employee moves to the next step The system uses the *Months* and *Date Frequency* fields on the pay grade control record for the specified step to determine if the employee must work a specified number of months before moving to the next step on the pay grade. If you use these fields, the system calculates the date the employee moves to the next step and fills in the *Next Step Date* field accordingly.

Whether or not you override this value, 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.

Job Code 1

The system displays the job code to which the employee is assigned. This job is associated with the employee's hire position and in this chapter it is also linked to a pay grade.

Payroll Rate 1

The system uses the rate you type in the *Pay Rate 1* field on the pay grade control record to fill in this field. You can replace this rate with a different rate if necessary.

Payroll Rate 2

The system uses the rate you type in the *Pay Rate 2* field on the pay grade control record to fill in this field. You can replace this rate with a different rate if necessary.

Payroll Rate 3

The system uses the rate you type in the *Pay Rate 3* field on the pay grade control record to fill in this field. You can replace this rate with a different rate if necessary.

After you complete the necessary fields on this screen, press Enter to continue. The system displays the balance of the Enter New Hire screens. See the "Entering New Hires" parts for detailed information on how to complete the balance of the screens in this function.

Working with Pay Grade Information in the Basic Data Record

After you hire an employee assigned to a step-in-grade job, the system displays pay grade-related information in eight of the fields in his or her basic data record. The system does not display this field for employees in non-step-in-grade jobs. You fill these fields initially during the *Enter New Hire* function and use the *Mass Update Employee Steps* function to maintain most of them. The fields are:

Field Name	Updated By
Pay Grade *Pay Grade Date*	The *Enter New Hire* and *Enter Personnel Actions* functions; you can maintain the *Pay Grade Date* field manually.
Step *Step Date*	The *Enter New Hire*; *Enter Personnel Actions,* and *Mass Update Employee Steps* functions.
Next Step *Next Step Date*	The *Enter New Hire*; *Enter Personnel Actions,* and *Mass Update Employee Steps* functions; you can also maintain these fields manually.
Freeze Step?	The *Mass Update Employee Steps* function when employees reach the top regular step in their pay grade. You can also maintain this field manually.
Step Override?	The value in this field is always **0** for a newly hired employee, whether or not you override the values in the employee's *Next Step* and *Next Step Date* fields when you use the *Enter New Hire* function to hire the employee. If you later type information in the *Next Step* or *Next Step Date* fields when you use the *Update Basic Data* function, the system sets this value to **1** and does not apply hours-worked requirements specified on the pay grade control, if applicable, when you execute the *Mass Update Employee Steps* function. You can also maintain this field manually.

Maintaining Employee Step Data

You use the *Mass Update Employee Steps* function to move the employee from his or her current step, which the system displays in the *Step* field, to his or her next step, which the system displays in the *Next Step* field. The system uses the hours worked and/or months worked requirements you establish on the pay grade control to determine when to advance employees.

When you use the *Mass Update Employee Steps* function to move an employee to his or her next step, the system also updates each employee's *Base Rate* field in basic data with the rate associated with his or her next step. The *Mass Update Employee Steps* function can also update rates in payroll data if you have authority to update payroll rates.

You should run the *Mass Update Employee Steps* function on a regular basis to keep the employee's step information and pay rates current.

Changing an Employee's Pay Grade Assignment

You can use the transfer, promotion, demotion, rehire and salary change transactions in the *Enter Personnel Actions* function to change an employee's assigned pay grade. You use the first four transactions to move the employee to a new position. If the new position is associated with a different job than the employee's current job, the system uses the pay grade information on the new job control to update the pay grade fields in the employee's basic data record.

If the new job is not associated with a pay grade, the system clears the pay grade-related fields in the employee's basic data record and the employee is no longer affected by the *Mass Update Employee Steps* function.

You can use the salary change transaction to change the employee's current pay grade or step assignment and the associated pay rate(s).

Maintaining Step Rates

If you need to change the step rates on the pay grade control record, you can change them manually through the *Update Pay Grade and Steps* function, or you can use the *Mass Update Step Rates* function to change them through system processing.

You use the *Mass Update Employee Step Rates* function to apply the changed rates to employees.

See the “Using step-in-Grade Mass Update Functions” chapter for details on how to use the Mass Update functions associated with step-in-grade processing.

Using Personnel Actions with Step-in-grade Employees

You use the *Mass Update Employee Steps* function to automate the step progression of employees assigned to pay grades and update their pay grade-related information including pay rate(s). You can use the salary change transaction in the *Enter Personnel Actions* function to change an employee's current step in his or her assigned pay grade.

You can use the transfer, promotion, demotion or rehire transactions in the *Enter Personnel Actions* function to move an employee from one position to another. If the employee's new position is associated with a different job than his or her prior position, the system uses the pay grade data on the new job control to update the employee's pay grade-related information. The system also automatically presents the Salary Change Transaction screen for you to confirm pay rate changes based on the employee's new pay grade and step assignment.

In this section you learn about only the following transactions and fields in the *Enter Personnel Actions* function that impact step-in-grade processing:

- Salary Change
- Promotion
- Transfer
- Demotion
- Rehire

See the preceding parts on Entering Personnel Actions for complete information on how to use the *Enter Personnel Actions* function.

Follow these steps to access the *Enter Personnel Actions* function:

1. From the Infinium HR main menu select *Employee Data.*
2. Select *Update Employee Data.*
3. Select *Enter Personnel Actions* [EPA]. The system displays the screen shown in Figure 18-9.

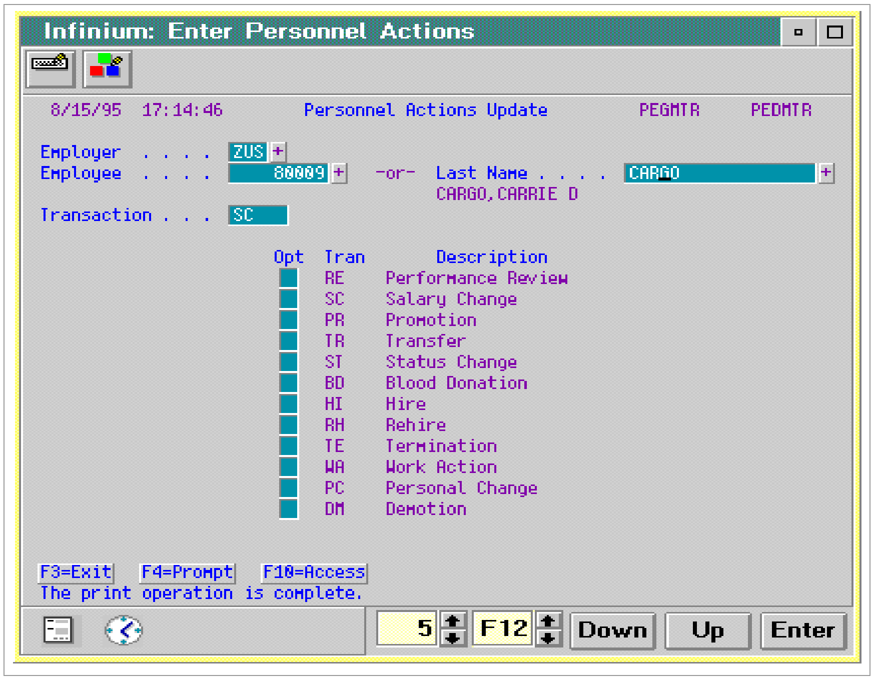


Figure 18-9: Enter Personnel Actions prompt screen

4 Use the following information to fill in the fields on this screen:

The *Employer* and *Employee* fields are required. You must also specify the transaction you want to enter by doing one of the following:

- Type the transaction code in the line adjacent to the *Transaction* field.
- Type any character in the *Opt* field next to the transaction you want to process.

Use the preceding information to access the personnel action transactions discussed in the following sections of this chapter including the following:

- Salary change
- Promotion
- Transfer
- Demotion

Entering Salary Change Transactions for Step-in-grade Employees

You use the salary change transaction to change the value in the employee’s *Step* field in his or her basic data record along with the rates in his or her basic data and payroll data records. You normally do not need to use the salary change transaction to increase the pay rates of step-in-grade employees since the system does that automatically when you run the *Mass Update Employee Steps* function.

The base pay rate is stored in the *Base Rate* field in basic data. If personnel users at your location are authorized to update payroll rates, you can also update the employee’s payroll rates which are stored in the *Update Payroll Data* function on Infinium PY.

1 From the *Enter Personnel Actions* prompt screen, select the **SC** transaction and press Enter. The system displays the screen shown in Figure 18-10.

```
 6/12/14 12:24:44        Personnel Actions Update          PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80009 CARGO,CARRIE D
  SC                                 Salary Change
SC Effective Date  ________                Position  . . . .  401600 +
SC Reason . . . .  _____ +                 Job Code  . . . .  600   +
SC Base Rate  . .  ___________.0000 -or-   Increase %  . . .  ____.0000
Updt Payroll Rate  1  (0->5)               Payroll Rate  . .  ___________.0000
Pay Grade . . . .  MECH  +                 Scheduled Pay Pds  52
Current Step  . .   3 +                    Regular Hours . .   40.00
Pay Type  . . . .  H                       Bonus?  . . . . .  0 (0=No 1=Yes)
SC Base Frequency  H                       Comp Ratio  . . :  102.9600
Pay Frequency . .  W                       Salary Quartile :  3
Prev. Frequency .  H                       Prev. Base Rate .         20.0000
Comment . . . . .                          Description . . .  

 2=Change  4=Delete
Opt   Date     Reasn          Base Rate       Incr%          Incr. Amt.     Comp
 _   3/01/2002 ADJST H          20.0000        .0000              .0000   102.96
 _   3/01/2002 ADJST H          20.0000        .0000              .0000   102.96
 _   7/01/2000 GEN   H          20.0000      11.1111             2.0000   102.96
 _   1/01/2000 CONTR H          15.7500       3.2700              .5000    85.  +
F3=Exit/Update  F4=Prompt  F5=More Info  F8=Calculate  F10=Access  F12=Cancel
```

Figure 18-10: Personnel Actions Update - Salary Change screen

2 Use the following information to make changes to pay grade related fields on this screen:

You must type information in the *SC Effective Date, SC Reason, SC Base Rate, Scheduled Pay Pds, Regular Hours, Pay Type, Bonus, SC Base Frequency, Pay Frequency*, and *Prev. Frequency* fields.

The screen above contains two salary change transactions:

- one updates the employee's *Base Rate* field in basic data and her *Pay Rate* field in payroll data
- the other updates her *2nd Pay Rate* field in payroll data

The system creates two salary change transactions during the *Mass Update Employee Steps* function when you associate two rates with the employee's step in the pay grade control, as in this example.

The system defaults information into the *Scheduled Pay Pds, Regular Hours, Pay Type, SC Base Frequency,* and *Pay Frequency* fields for all employees. It also fills in the *Pay Grade* and *Current Step* fields for step-in-grade employees.

You can make changes to the employee's current step in his or her assigned pay grade. You cannot use the salary change transaction to change the pay grade to which the employee is assigned. The system requires that the employee be assigned to the pay grade associated with the employee's job control.

When you use the salary change transaction to update the employee's current step, the system creates a salary change history record and automatically updates the fields below in the employee's basic data record.

Salary Change Transaction Field	Field Updated in Basic or Payroll Data	Comments
SC Effective Date	*Step Date* - Basic Data	
Current Step	*Step* - Basic Data	
	Next Step - Basic Data *Next Step Date* - Basic Data	The system uses the updated *Step* number and the pay grade control to update the *Next Step* and *Next Step Date* fields.
SC Base Rate	*Base Rate* - Basic Data	The system updates this rate if you type **0** or **1** in the *Updt Payroll Rate* field.

Salary Change Transaction Field	Field Updated in Basic or Payroll Data	Comments
Payroll Rate	*Pay Rate* - Payroll Data	The system updates this rate if you type **1** in the *Updt Payroll Rate* field.
	2nd Pay Rate - Payroll Data	The system updates this rate if you type **2** in the *Updt Payroll Rate* field.
	3rd Pay Rate - Payroll Data	The system updates this rate if you type **3** in the *Updt Payroll Rate* field.

SC Effective Date

Type the date on which the employee is assigned to a new step in his or her current pay grade. The system uses this date to update the *Step Date* field in the employee's basic data record.

SC Reason

Type the code value that identifies why the employee is assigned to a new step. You define values for this field using code type **SAL.**

Updt Payroll Rate

Type the value that indicates which payroll rate you want to update. If the step to which you are assigning the employee has more than one rate, you must create a salary change transaction for each rate. You can use the same effective date and reason code for each transaction.

Valid values are:

0	Do not update payroll rates; only update the *Base Rate* field in basic data.
1	Update the *Pay Rate* field in payroll data and the *Base Rate* field in basic data.
2	Update only the *2nd Pay Rate* field in payroll data.
3	Update only the *3rd Pay Rate* field in payroll data.

Current Step

Type the new step within the employee’s current pay grade to which the he or she is assigned. Press F4 to display a list of steps defined for the employee’s current pay grade. You use the *Update Pay Grade and Steps* function to define steps.

If the employee for whom you are processing the Salary Change transaction is assigned to a step-in-grade job, the system displays the current step within the assigned pay grade.

You can type a new step for the employee in this field if the step is defined on the Pay Grade Control record. If you type a new value in the *Current Step* field, you can type the new rate in the *SC Base Rate* and *Payroll Rate* fields.

If this is not a bonus salary change, the rates you type in the *SC Base Rate* and *Payroll Rate* fields must agree with the rate defined for the employee's *Current Step* on the Pay Grade Control record. The system automatically fills in the *SC Base Rate* and *Payroll Rate* fields if you leave them blank and press Enter.

If this is a bonus salary change, the rates you enter in the *SC Base Rate* and *Payroll Rate* fields do not have to agree with the rate defined for the employee's *Current Step* on the Pay Grade Control record. You must fill in the *SC Base Rate* field, but you can leave the *Payroll Rate* blank, fill it manually or have the system calculate it.

3 After you enter information in the above fields, press F8. Depending upon the value you entered in the *Updt Payroll Rate* field, the system does one of the following:

- If you typed **0** in the *Updt Payroll Rate* field, the system updates the *SC Base Rate* field on this screen with the rate from the *Pay Rate 1* field on the pay grade control for the step you entered in the *Current Step* field.
- If you typed **1** in the *Updt Payroll Rate* field, the system updates the *SC Base Rate* and *Payroll Rate* fields on this screen with the rate from the *Pay Rate 1* field on the pay grade control for the step you entered in the *Current Step* field.
- If you typed **2** in the *Updt Payroll Rate* field, the system updates the *SC Base Rate* field on this screen with the rate from the *Pay Rate 1* field on the pay grade control for the step you entered in the *Current Step* field. The system also updates the rate in the *Payroll Rate* field on this screen with the rate from the *Pay Rate 2* field on the pay grade control for the step you entered in the *Current Step* field.
- If you typed **3** in the *Updt Payroll Rate* field, the system updates the *SC Base Rate* field on this screen with the rate from the *Pay Rate 1* field on the pay grade control for the step you entered in the *Current Step* field

and the *Payroll Rate* field on this screen with the rate from the *Pay Rate 3* field. The system also updates the pay grade control for the step you entered in the *Current Step* field.

4 Press Enter. The system stores the salary change transaction in the sub-file at the bottom of this screen.

5 Press F3 to exit from this screen. The system updates the step-in-grade and compensation-related fields in the employee’s basic data record and saves the salary change transaction in the employee’s history.

6 Repeat steps 5 through 9 to update additional payroll rates for the employee. After you update all of the employee’s rates to agree with his or her new step assignment, press F3 to return to the Infinium HR main menu.

Entering Transfer, Promotion and Demotion Transactions for Step-in-grade Employees

You use the transfer, promotion and demotion transactions to move an employee to a new position within his or her current employer. With the transfer transaction, you can also move the employee to a new position in a new employer. The system updates the employee's pay grade and pay rate information in different ways depending on whether the new position is associated with the same or a different job and pay grade.

This section presents information on the promotion, demotion and transfer screens as they relate to step-in-grade processing. Since the system displays similar screens and performs identical updating for the promotion, demotion and intra-company transfer transactions, they are discussed together below. For complete information on how to use the promotion, demotion, transfer or rehire transactions, see the "Entering Personnel Actions" parts.

New Position Associated with New Job and Pay Grade

If the new position is associated with a new job and pay grade in the same employer, the system updates the employee's pay grade and rate information. It automatically displays the Salary Change transaction screen after you exit from the Transfer, Promotion or Demotion screen under the following conditions:

- You specified rounding types **1** (round down) or **2** (round up) on the new pay grade control
- You did not enter a future-dated transaction

The system uses the *Rounding Type* field on the new pay grade control to select a step for the employee on the new pay grade.

Inter-company Transfers

For inter-company transfers, if you assign the employee to a position in the new employer that is associated with a pay grade, the system automatically places the employee in the pay grade and selects a step using the value in the *Rounding Type* field on the new pay grade control. The system does not display the Salary Change screen after you completed the transfer transaction.

New Position Associated with Same Pay Grade

If the new position is associated with the same job or a new job with the same pay grade, the system does not change the employee’s assigned pay grade or step. It does not display the Salary Change Transaction screen after you exit from the Transfer, Promotion or Demotion transaction screens.

Types of Transfers

You perform an intra-company transfer when you use the transfer transaction to move the employee within his or her current employer. When you enter intra-company transfers, you use the transfer transaction just as you use the Promotion or Demotion screens.

You perform an inter-company transfer when you use the transfer transaction to move an employee to a new employer. You enter additional information on the Transfer screen to move the employee to a new company. The system handles the updating of pay grade-related information differently for inter-company transfers than for intra-company transfers. See the following section entitled “Entering Inter-Company Transfer Transactions” for details.

Use the following information to work with step-in-grade information related to the promotion, demotion or transfer transactions. For transfer transactions, comments in this section pertain only to intra-company transfers.

1. Follow the steps on page 18-31 to access the *Enter Personnel Actions* function.

2. From the *Enter Personnel Actions* prompt screen, select the **PR**, **TR** or **DM** transaction and press Enter. If you select the promotion transaction, the system displays the screen shown in Figure 18-11.

```
 6/12/14 12:26:45        Personnel Actions Update       PEGMTR     PEDMTR
Employer  . . . :  ZUS SAMPLE US COMPANY
Employee  . . . :      80008 TRUCKER,TOM E
Position  . . . :  401700    INTERSTATE DRIVER
  PR                            Promotion
PR Effective Date  _________              Job Code  . . . :
PR Position . . .  ______ +               Scheduled Pay Pds  52
Shift Code  . . .  1____ +                Regular Hours . .   40.00
Area        . . :                         Labor Category  :
Division    . . :                         Worker s Comp . :
Department  . . :                         Location  . . . :
Cost Centr  . . :                         Union . . . . . :
Sup. Employer . :  ZUS +                  Sup. Name: ROAD,ROCKY                  +
Comment . . . . .                         Description . . .  __________________

 2=Change  4=Delete
Opt  Date     Lvl  Positn  Job   Loctn  Labor  Union  -------  Levels  ------




F3=Exit/Update  F4=Prompt  F6=More Info  F10=Access  F12=Cancel
```

Figure 18-11: Personnel Actions Update - Promotion screen

3 Use the following information to fill in the fields on this screen:

You use the promotion, demotion and transfer transactions to move the employee to a new position in his or her current employer. You select the appropriate transaction to update the position-related information in the employee's basic data record depending on whether the employee moves to a higher or lower or similar position compared to the one to which he or she is currently assigned.

In all cases, the new position is associated with a job control. If the job control is different from the one to which the employee is currently assigned, and if the new job control is linked to a pay grade that is different from the one to which the employee is currently assigned, the system uses the *Rounding Type* field on the new pay grade control to select a step in the new pay grade for the employee.

If a step-in-grade employee moves to a new position that is not associated with a step-in-grade job, the system clears the pay grade-related fields in his or her basic data record and he or she is no longer affected by the *Mass Update Employee Steps* processing. If a non-step-in-grade employee moves to a step-in-grade position, the system updates the pay grade-related fields in his or her basic data record and maintains them through the *Mass Update Employee Steps* function.

For employees who are promoted, demoted or transferred to a position associated with a step-in-grade job, the system uses the information on the new pay grade control to determine if the employee receives a pay rate change as a result of the position change. If the employee should receive a rate change, the system automatically presents the Salary Change screen when you exit from the Promotion, Demotion or Transfer screen. You use the salary change transaction to update pay rate information for employees whose pay rates change due to their change in pay grade.

The system uses the following logic to determine if the employee's pay rates change due to a pay grade change:

- If you entered **1** or **2** in the *Rounding Type* field on the new pay grade, the employee's pay rates can change because of his or her new pay grade assignment. The only time when the employee's rates do not change is when the system finds a *Pay Rate 1* value associated with a step on the new pay grade that matches the employee's current base pay rate.

  If the system cannot find a matching rate for the employee on his or her new pay grade, it uses the *Rounding Type* field to select the employee's step on the new pay grade. It automatically displays the Salary Change screen when you exit from the Promotion screen and fills in the *Pay Grade* and *Current Step* fields. When you press F8 on the Salary Change screen, the system uses the *Current Step* field to make the necessary change to the employee's rate(s).

  After you verify the information and exit from the Salary Change screen, the system updates the employee's basic data and payroll data with the new pay grade and rate information.

- If you entered **3** in the *Rounding Type* field on the new pay grade, the employee's rates do not change until he or she progresses to the next step in his or her new pay grade. The system does not present the Salary Change screen when you exit from the Promotion screen.

You must type information in the *PR Effective Date* and *PR Position* fields. For demotion and transfer transactions, you must type information in the corresponding *Effective Date* and *Position* fields.

PR Effective Date

Type the date on which the employee is promoted to his or her new job. If necessary, the system automatically displays the Salary Change transaction screen for you to update the employee's pay rate(s) as a result of his or her promotion. The system uses the date you type in the *PR Effective Date* field on this screen to fill in the *SC Effective Date* field on the Salary Change transaction screen.

Similarly for a demotion or transfer transaction, the system uses the date you type in the corresponding *Effective Date* field on the Demotion or Transfer screen to fill in the *SC Effective Date* field on the Salary Change screen.

If you type a date in the future of the date you are entering information, system date, the system treats the promotion, demotion or transfer as a future-dated transaction and does not update the employee's basic data record with information from the employee's new position assignment until you run the *Mass Update PE Actions* function. The corresponding salary change, if any, is also future-dated and does not take effect until you run the *Mass Update PE Actions* function.

PR Position

Type the code that identifies the new position to which the employee is assigned. Press F4 to display a list of valid positions within the specified employer. When you select a position from the positions display, the system uses information from the new position and pay grade controls to immediately update fields on the Promotion and Demotion screens including the *Pay Grade* and *Step* fields.

Pay Grade

The system displays the value that identifies the pay grade associated with the job linked to the employee's new position. You cannot change this field on this screen. If the system displays an incorrect pay grade, you must use the *Update Job Controls* function to change the pay grade associated with the specified job.

Step

The system displays the step to which the employee is assigned. If the employee's pay grade does not change as a result of the promotion or demotion, the system displays the step to which he or she is currently assigned. If as a result of the promotion or demotion the employee moves to a new pay grade, the system uses the *Rounding Type* field on the pay grade control to select the appropriate step on the new pay grade.

You can replace the value in this field with another step on the pay grade shown in the *Pay Grade* field on this screen.

4. Press Enter. The system stores the promotion transaction in the sub-file of this screen. When you press F3, the system exits from this screen. If you did not enter a future-dated transaction, the system updates the employee's basic data record with information from the new position assignment.

5. If the promotion, demotion or transfer transaction meets the following conditions, the system displays the Salary Change Transaction screen:

- The employee moves to a new pay grade as a result of his or her promotion, demotion or intra-company transfer.
- The system cannot locate a value in the *Pay Rate 1* field associated with any step on the new pay grade that matches the employee's current *Base Rate* in his or her basic data record.
- The *Rounding Type* field on the new pay grade control is **1** or **2**.

6 If the system displays the Salary Change screen, it uses information from the promotion, demotion or transfer transaction to fill in all of the necessary fields except the following:

- *SC Reason*
- *SC Base Rate*
- *Payroll Rate*

After you type the appropriate code value in the *SC Reason* field, verify that all of the other information on the screen is correct; pay particular attention to the *SC Effective Date, SC Base Rate, Updt Payroll Rate, Pay Grade* and *Current Step* fields.

If you want to update the *Pay Rate* field in the employee's payroll data record, you can type the new rate in the *Payroll Rate* field or press F8 to have the system automatically update the field.

7 Press Enter to store the salary change transaction in the sub-file on this screen, and then press F3 to exit from this screen. The system displays the Personnel Actions Update prompt screen. You can enter another personnel actions transaction or press F3 to return to the Infinium HR main menu.

Entering Inter-Company Transfers for Step-in-grade Employees

This section provides information on how the system handles the update of pay grade-related employee data when you enter an inter-company transfer. Unlike the intra-company transfer, the system does not present the salary change transaction when you transfer an employee to a new employer. However, it does update the pay grade information in the transferee's basic data record in his or her new employer.

Use the following information to access the transfer transaction:

1. Follow the steps on page 18-31 to access the *Enter Personnel Actions* function.
2. From the Enter Personnel Actions prompt screen, select the **TR** transaction and press Enter. The system displays the screen shown in Figure 18-12.

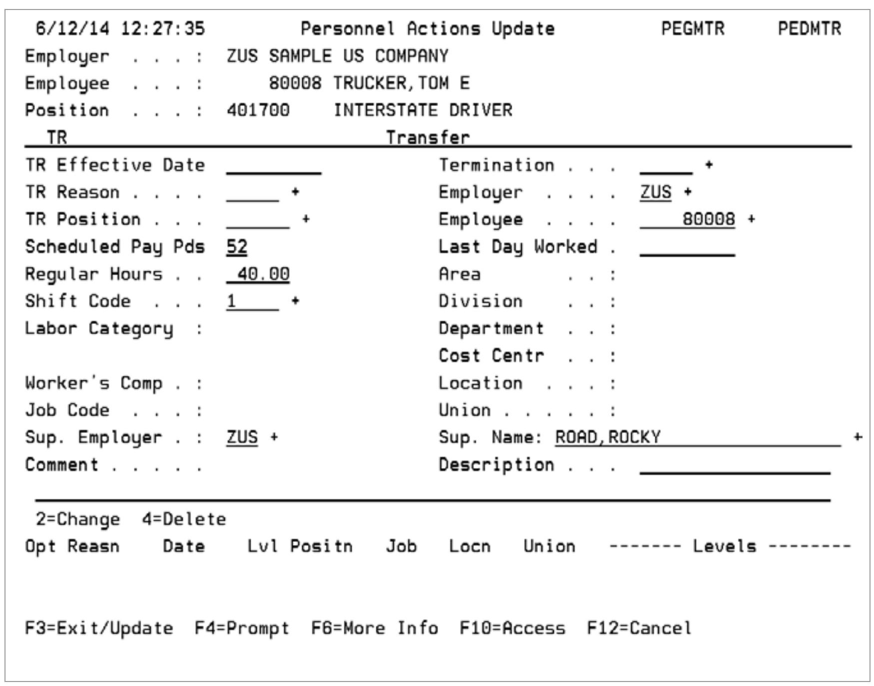


Figure 18-12: Personnel Actions Update - Transfer screen

3. Use the following information to fill in the fields on this screen for inter-company transfers:

You must type information in the following fields for an inter-company transfer:

- *TR Effective Date*
- *Termination*
- *TR Reason*
- *Employer*
- *TR Position*
- *Sup. Employer*
- *Sup. Name*

Refer to the “Entering Personnel Actions,” chapter for details on how to complete these fields on the Transfer screen.

4 After you fill in the above fields, press Enter to store the inter-company transfer in the sub-file at the bottom of the screen. Press F3 to exit from the screen.

If you use the auto cancel feature in Benefits Administration, the system cancels the employee’s benefit enrollments in his or her former employer. It then immediately displays the employee’s basic data record in his or her new employer for you to verify the transferred information.

The system uses the pay grade control associated with the employee’s new position in the new employer to update the following pay grade-related fields on the fourth screen of the employee’s basic data record in the new company:

Field on Transfer Transaction Screen	Related Field in Basic Data Record	Comments
TR Effective Date	*Pay Grade Date* *Step Date*	The system uses the *TR Effective Date* to update both the *Pay Grade Date* and *Step Date* fields.
Pay Grade	*Pay Grade*	The system assigns the pay grade associated with the employee’s job control in the new employer.
Current Step	*Step*	The system always starts an inter-company transferee on the first step of his or her new pay grade in the new employer.

Field on Transfer Transaction Screen	Related Field in Basic Data Record	Comments
	Next Step *Next Step Date*	The system determines this information using the pay grade control in the new employer.

You can override the information in the *Next Step* and *Next Step Date* fields on this screen if necessary. You must use the salary change transaction to assign the employee to a different current step, since you cannot type information in the *Step* field in the basic data record.

Beginning Step-in-grade Processing for an Existing Employer

This section discusses how to implement step-in-grade processing for current employees within an existing employer. You can use step-in-grade processing for some or all current employees in a particular employer. You follow these steps:

1. Define pay grade controls.
2. Update job controls with pay grade information.
3. Assign each employee to a position associated with a step-in-grade job.
4. Fill in the step-in-grade fields in each step-in-grade employee's basic data record using one of three methods.
5. Use the *Mass Update Employee Step Rates* function to update the pay rates of step-in-grade employees using the rates established on their assigned pay grade control.
6. Use the *Mass Update Employee Steps* function to maintain the employee's step assignment and pay rate(s).

See the previous sections of this chapter for details on how to establish and update pay grades and job controls.

After you establish the pay grade and job controls, you assign each employee whose compensation you will administer through step-in-grade processing to a position associated with a step-in-grade job. You can use the transfer, promotion, or demotion transactions in the *Enter Personnel Actions* function to move employees to step-in-grade jobs if their current job is not associated with a pay grade.

After you assign each step-in-grade employee to the correct position and job, you must fill in the step-in-grade fields in his or her basic data record. The fields that you must update are listed below.

Field Name	Comments
Pay Grade *Pay Grade Date*	Must be completed for all step-in-grade employees.

Field Name	Comments
Step *Step Date*	Must be completed for all step-in-grade employees.
Next Step *Next Step Date*	Must complete *Next Step* for all step-in-grade employees. Complete *Next Step Date* for employees assigned to pay grades with months worked criteria.
Freeze Step?	Use to identify employees who are not permitted to advance from their current step to their next step.
Step Override?	Use to identify employees whose next step does not correspond to the normal next step defined in the pay grade control. (For example, use for an employee who is skipping one or more steps between his or her current step and his or her next step.)

Before you establish pay grades and associate them with job controls, the only step-in-grade field in the basic data record in which you can enter a value is the *Pay Grade* field. The system does not allow you to enter information in any of the other fields.

After you establish pay grades and associate them with job controls, you can make manual entries in the following five fields in the basic data records of employees assigned to step-in-grade jobs:

- *Pay Grade Date*
- *Next Step*
- *Next step Date*
- *Freeze Step?*
- *Step Override?*

You cannot manually enter information into three of the key step-in-grade fields in the basic data record, which are *Pay Grade, Step* and *Step Date*. Since these fields must be filled in for step-in-grade processing to work, you can use one of the three options listed below to update step-in-grade information in the basic data records of step-in-grade employees:

- You can use the *Mass Update Employee Positions* function to initialize all of the fields listed in the preceding table, including the *Pay Grade, Step* and *Step Date* fields.
- You can use the salary change transaction to ensure that each step-in-grade employee is assigned to the correct step.
- Your technical support staff can write a custom program to initialize some or all of the step-in-grade fields.

Using the *Mass Update Employee Positions* Function

This section discusses how to use the *Mass Update Employee Positions* function to fill in the step-in-grade fields in the basic data record. The *Mass Update Employee Positions* function is designed to update many fields in the basic data records of employees with information from the job and position controls to which each employee is assigned. This function is discussed in detail in the “Changing Employee Data” chapter. This section discusses only how to use this function to update the step-in-grade fields in the basic data record.

You can use the *Trial Update Employee Positions* function to preview the step-in-grade information that will be updated for affected employees when you run the *Mass Update Employee Positions* function. The *Trial Update Employee Positions* function generates a report that you can use to check how the system uses your selection criteria and applies information from the pay grade controls to individual employees.

After you obtain the correct results from the *Trial Update Employee Positions* function, you run the *Mass Update Employee Positions* function to update step-in-grade information in the basic data records of employees assigned to step-in-grade jobs.

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

   You use this function to update the basic data records of employees with information from the job and position to which each employee is assigned. The system updates step-in-grade information only for employees assigned to step-in-grade jobs but does not update pay rates for step-in-grade.

Use the *Mass Update Employee Step Rates* function to update the pay rates of step-in-grade employees so that they are in agreement with the pay rates defined on the pay grade controls. Verify that each step-in-grade employee’s *Base Frequency* field in basic data is compatible with his or her new *Base Rate*.

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 code that represents the employer within which 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 or the *Employer Group* field.

Employer Group

Type the code value that identifies the group of employers within which 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 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 each 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 entered **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 his or her *Adjusted Date of Hire* field, the system uses the information in his or her *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 his or her *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 if 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 his or her position control record.
1	Update the *Position Title* field in each employee’s basic data record with the title specified on his or her 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.

Comment

Type any additional information about this transfer personnel transaction.

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.

The system generates two audit reports; both are entitled "Log of Mass Updates to Employee Data." The first report identifies the changes to non-step-in-grade information in the employee basic data record, such as levels, job code, EEO code and so on. The second report identifies changes to step-in-grade information, such as pay grade, current step, next step and so on.

The table below summarizes the information on each report.

Report File Name	Identifies Changes to the Following Fields in Employee Basic Data:
PETOG020	For all employees: *Levels, Job Code 1, EEO Category, Location, Salary Range, Union, Workers Comp, Labor Category, PE Benefit Group, EEO-4 Function, Comp Ratio, Salary Quartile* and *Shift*. Also updates the *Position Title* field, if specified.
PETO021	For step-in-grade employees only: *Pay Grade, Pay Grade Date, Step, Step Date, Next Step, Next Step Date, Freeze Step?,* and *Step Override?*, along with identifying the expected Base Rate change applicable for each employee.

Review the audit reports. If you find errors, make any necessary changes to the pay grade controls, job controls, position controls 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.

A sample of the report containing step-in-grade information that the system generates when you run the *Trial Update Employee Positions* function is shown on the following page.

```
PEGOG020   PETOG021              L O G   O F   M A S S   U P D A T E S   T O   E M P L O Y E E   D A T A              Page    1
 8/17/95   12:29:54                           * * *   T R I A L   L I S T   O N L Y   * * *
EMPLOYER ZUS                                     SAMPLE US COMPANY
                                    PAY    PAY GRADE           STEP       NEXT  NEXT STEP    FREEZE  STEP     EXPECTED *
EMPLOYEE#  NAME                    GRADE     DATE       STEP    DATE       STEP    DATE       STEP   OVRD     RATE CHG
-----------------------------------------------------------------------------------------------------------------------------------
    80004        |CHANGED FROM-->                        0                   0                   0      0     20,000.0000
ARNOLD,ANNA A    |CHANGED TO --->  ACCT    7/01/1994     3   7/01/1994      0                   1      0         14.0000
                                   * BASE RATE DECREASE WILL OCCUR WITH THIS STEP

    80005        |CHANGED FROM-->                        0                   0                   0      0          7.5000
ACCURATE,ALAN    |CHANGED TO --->  LAB     6/01/1994     1   6/01/1994      2   9/01/1994       0      0          8.0000

    80019        |CHANGED FROM-->                        0                   0                   0      0
SMOG,SUSIE S     |CHANGED TO --->  LAB     2/15/1995     5   2/15/1995      6   5/15/1995       0      0

         TOTAL EMPLOYEES CHANGED        3

         ** NOTE: NO RATE CHANGES APPLIED - MASS UPDATE EMPLOYEE STEP RATES IF NECESSARY
```

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 *Trial Update Employee Positions* [MUEPD]. The system displays the Mass Update Employee Positions screen.

5 Use the information on page 18-49 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.

A sample of the report containing step-in-grade information that the system generates when you run the *Mass Update Employee Positions* function is shown on the following page.

```
PEGOG020   PETOG021              L O G   O F   M A S S   U P D A T E S   T O   E M P L O Y E E   D A T A               Page    1
 8/17/95   12:36:54
EMPLOYER ZUS                                                SAMPLE US COMPANY
                                    PAY    PAY GRADE             STEP       NEXT  NEXT STEP    FREEZE  STEP     EXPECTED *
EMPLOYEE#  NAME                    GRADE     DATE       STEP    DATE       STEP     DATE       STEP   OVRD     RATE CHG
-----------------------------------------------------------------------------------------------------------------------------------
    80004        |CHANGED FROM-->                        0                   0                  0      0     20,000.0000
ARNOLD,ANNA A    |CHANGED TO --->   ACCT    7/01/1994     3   7/01/1994      0                  1      0         14.0000
                                    * BASE RATE DECREASE WILL OCCUR WITH THIS STEP

    80005        |CHANGED FROM-->                        0                   0                  0      0          7.5000
ACCURATE,ALAN    |CHANGED TO --->   LAB     6/01/1994     1   6/01/1994      2   9/01/1994      0      0          8.0000

    80019        |CHANGED FROM-->                        0                   0                  0      0
SMOG,SUSIE S     |CHANGED TO --->   LAB     2/15/1995     5   2/15/1995      6   5/15/1995      0      0

         TOTAL EMPLOYEES CHANGED        3

         ** NOTE: NO RATE CHANGES APPLIED - MASS UPDATE EMPLOYEE STEP RATES IF NECESSARY
```

Converting Step-in-grade Information during Implementation

If you are a new customer implementing Infinium HR, you may want to update step-in-grade information for some or all employees. In order to use step-in-grade processing, you need to fill in the following fields in the basic data records of step-in-grade employees:

Field Name	Comments
Pay Grade *Pay Grade Date*	Must complete for all step-in-grade employees.
Step *Step Date*	Must complete for all step-in-grade employees.
Next Step *Next Step Date*	Must complete *Next Step* for all step-in-grade employees. Complete *Next Step Date* for employees assigned to pay grades with months worked criteria.
Freeze Step?	Use to identify employees who are not permitted to advance from their current step to their next step.
Step Override?	Use to identify employees whose next step does not correspond to the normal next step defined in the pay grade control. (For example, use for an employee who is skipping one or more steps between his or her current step and his or her next step.)

To prepare employee records for step-in-grade processing during your initial implementation of Infinium HR, you can use two methods:

- You can use the *Mass Update Employee Positions* function after you have successfully converted or manually established basic data for existing employees. See the preceding section for details about the *Mass Update Employee Positions* function.
- If you have step-in-grade information on your current system or if the information can be determined based on existing basic data information, your MIS staff can modify the standard conversion program that creates basic data records for employees (CVGM01) to fill these fields or they can write a custom program to populate the step-in-grade fields.

Notes

Chapter 19 Using Step-in-grade Mass Update Functions

19

This chapter provides you with information on how to use the following three mass update functions to automate the salary administration of step-in-grade employees.

The chapter consists of the following topics:

Overview of Step-in-grade Mass Update Functions

You became familiar in the “Establishing Step-in-grade Processing” chapter with how to establish step-in-grade processing to manage salary administration for employees who are paid standard rates that increase based on their length of service, hours worked, or a combination of both factors. In the “Establishing Step-in-grade Processing” chapter, you became familiar with how to define pay grades and establish steps within each pay grade, and how to assign new or existing employees to pay grades.

The *Mass Update Employee Steps* function within step-in-grade processing allows you to automate the employee’s movement through the steps in his or her assigned pay grade. The system uses the length of service and/or hours worked requirements on the pay grade control to advance the employee from one step to the next in his or her assigned pay grade. It automatically updates the employee’s personnel and payroll pay rates with the rates associated with the new step and records the rate changes in the employee’s salary history.

The *Mass Update Step Rates* function allows you to automatically update the rates associated with steps on the pay grade control. You can specify amount or percent increases to some or all of the steps and rates.

The *Mass Update Employee Step Rates* function updates employee records using the rates on each employee’s assigned pay grade control. It does not change the employee’s step assignment; it only updates his or her rates with the standard rates on the pay grade control.

The system creates salary change transactions within the *Enter Personnel Actions* function for all rate changes generated through the *Mass Update Employee Steps* and *Mass Update Employee Step Rates* functions for reporting and history displays.

Objectives

When you complete this chapter, you should be familiar with how to:

- Understand step-in-grade processing
- Update employee steps
- Update step rates
- Update employee step rates

Understanding Step-in-grade Processing

You use step-in-grade processing to automate the rate progression of selected employees. You can use step-in-grade processing to manage compensation for some of your workforce and use other methods of salary administration, such as a merit program, for other employees.

To implement step-in-grade processing, you first establish pay grade controls that define how many steps are in each pay grade. You can define up to 99 steps per pay grade. You associate up to three rates with each step. You can use these rates to update the employee's base rate in basic data as well as his or her rates in payroll data. You specify the length of time and/or number of hours employees must work in their current step before they can advance to the next step.

When you execute the *Mass Update Employee Steps* function, the system uses criteria on the pay grade controls and information in the employee's basic data record to advance employees to their next step and update their personnel and payroll rates.

Pay grades are linked to jobs, and jobs are associated with positions. Employees are initially assigned to positions when you use the *Enter New Hire* function. You use the transfer, promotion, demotion and rehire transactions in the *Enter Personnel Actions* function to move employees to new positions.

When you assign the employee to a position associated with a step-in-grade job, you place the employee on a starting step in the pay grade. You use the *Mass Update Employee Steps* function to move the employee from the starting step to the next step and so on.

The system uses or updates the following fields in employee records when you run the *Mass Update Employee Steps* function:

The system uses these fields	On this screen	During the Mass Update Employee Steps function to
Pay Grade *Pay Grade Date* *Step* *Step Date* *Freeze Step?* *Step Override?* *Next Step* *Next Step Date*	Basic Data Screen 4	Determine which employees advance to their next step. Update the employee's new *Step* and *Next Step* information.
Base Rate *Last Increase* *Increase Reason* *Last Increase %* *Last Increase Amt* *Previous Rate* *Salary Quartile* *Comp Ratio*		Update these fields based on the employee's advancement to his or her next step.
Pay Rate *2nd Pay Rate* *3rd Pay Rate*	Payroll Data Screen 1	Update fields based on the employee's new step.

Updating Employee Steps

You use the *Mass Update Employee Steps* function to maintain the employee's step information after he or she is hired. When you run the *Mass Update Employee Steps* function, the system uses information on the pay grade control to advance the employee from his or her current step to the next step in his or her assigned pay grade.

You can use the *Trial Update Employee Steps* function to preview the changes the system will make when you run the *Mass Update Employee Steps* function. The *Trial Update Employee Steps* function produces a report that you review and use to make any necessary changes to employee information before you run the *Mass Update Employee Steps* function.

The system also generates a report when you run the *Mass Update Employee Steps* function that identifies the employees who advanced to their next step along with their personnel and payroll rate changes, their next step and next step date.

The system generates a warning message on the reports from both the *Trial* and *Mass Update Employee Steps* functions that identifies employees who reach the top regular step in their pay grade. When you run the *Mass Update Employee Steps* function, the system performs the following actions on three fields in the basic data records of employees who reach the top regular step in their pay grade:

- Sets the *Freeze Step?* field to **1**
- Enters **0** in the *Next Step* field
- Leaves the *Next Step Date* field blank

You use the *Off Scale?* field on the pay grade control to distinguish regular steps from exception steps. The system does not automatically move employees to exception steps, which are those on which you set the *Off Scale?* field to **1**.

In both the *Trial* and *Mass Update Employee Steps* functions, the system skips employees whose *Freeze Step?* field in basic data is **1**. This field indicates that the employee should not move or cannot move from his or her current step. When you type **0** in this field, the system begins to include the employee in the *Trial* and *Mass Update Employee Steps* processing.

You use the *As of Date* field on the selection screen for the *Trial* and *Mass Update Employee Steps* functions to identify which employees the system should advance to the next step. For employees whose step movement is based all or in part on months of service, the system compares the *As of Date* you specify to each employee's *Next Step Date* in basic data and moves those employees whose *Next Step Date* is the same as or earlier than the *As of Date*.

For example, if you type **6-1-95** in the *As of Date* field, the system moves all employees whose *Next Step Date* is 6-1-95 or earlier, unless their individual *Freeze Step?* fields are **1** or they must also meet an hours worked requirement.

For employees whose step movement is based all or in part on hours worked, the system uses the *As of Date* you specify to review the employee's check history in Infinium PY. The system totals hours from checks with period ending dates between the date specified in the *Date Frequency* field on the pay grade table and the *As of Date* on the selection screen to determine if the employee has satisfied the hours requirement on the pay grade table for his or her current step. When the employees' hours worked are equal to or exceed the hours requirement on the pay grade table for his or her current step, the system advances the employee to his or her next step.

For example, you establish a pay grade with a requirement that employees in Step 1 work 500 hours from their date in Step 1 before they can progress to Step 2. Sam Smith is currently on Step 1 with a step date of 3-15-95. If you type **6-1-95** in the *As of Date* for Sam, the system reviews all payroll checks with period ending dates on or after 3-15-95 and on or before 6-1-95 to determine if he has worked 500 hours of the incomes in the specified income group on the pay grade control. When Sam's total hours for that period are 500 or greater, the system moves him to the next step in his pay grade.

If a pay grade control includes both hours worked and months worked requirements, employees assigned to that pay grade must meet both requirements before the system moves them to their next step.

During the *Mass Update Employee Steps* function, the system makes salary changes based on the employee's progression to his or her next step. In addition to updating the rates stored in the employee's basic data and payroll data records, the system creates salary change transactions in the employee's history. You can use the *Enter Personnel Actions* function to view the salary change transactions.

As with any salary change transactions you enter manually, the system uses the salary change transactions created by the system when you run the *Mass Update Employee Steps* function to build a history of salary information for the employee. You can use the *Display Salary Changes* function to view salary change history information for many employees, or the *Display Employee History* function to review an individual employee's salary change history.

Reports Showing Salary Change History

Many standard reports include salary change history including *List PE Actions, List PE Action Details*, *List PE Actions by Levels* and *List PE Actions by Employee*. See the “Displaying Employee History” and “Printing Employee History” chapter for details.

Using Trial Update Employee Steps

Follow these steps to run the *Trial Update Employee Steps* function.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Mass Update Step Data.*

3 Select *Trial Update Employee Steps* [TUES]. The system displays the screen shown in Figure 19-1.

```
 5/21/03  13:30:57      Trial Update Employee Steps      PRGSG50    PRDSG50

Employer  . . . .  ZUS +      -or-     Employer Group  .  _____ +

Level 1 . . . . .  _____ +             Level 2 . . . . .  _____ +
Level 3 . . . . .  _____ +             Level 4 . . . . .  _____ +

Pay Grade . . . .  DRIVE +             Pay Type  . . . .  _
Job Code  . . . .  _____ +             Union Code  . . .  _____ +
Method  . . . . .  _

Update Payroll  .  4  (0->4)           Report Order  . .  1  (1->2)

As of Date  . . .   5152003            Sal.Chg. Reason .  ADJST +
Description . . .  UNION CONTRACT
Comments  . . . .
UNION CONTRACT RATE CHANGE_



F3=Exit   F4=Prompt   F10=Access
```

Figure 19-1: Trial Update Employee Steps screen

4 Use the following information to fill in the fields on this screen:

You use this screen to specify how the system advances step-in-grade employees. The system updates the employee’s *Base Rate* field in his or her basic data record with the rate in the *Pay Rate 1* field associated with his or her new step on the pay grade control.

If you are authorized to update payroll rates, you can also update the employee's payroll rates, which are stored in the *Pay Rate, 2nd Pay Rate* and/or *3rd Pay Rate* fields in the payroll data record. The system typically uses the payroll rates to calculate the employee's pay during payroll cycle processing. You should coordinate with Infinium PY users at your site to ensure that you make payroll rate changes in advance of the appropriate pay cycle.

The system does not automatically prorate salary changes that occur in the middle of a pay period. For example, if you run the *Mass Update Employee Steps* function with an effective date of 6/5/95 in advance of the pay period that includes 6/1/95 through 6/8/95, the system updates the employee's payroll rates immediately and uses the new payroll rate(s) to calculate all of the employee's earnings in that pay period.

payroll processors can use the *Retroactive Pay Processing* function to compute adjustments that are due when you enter employee rate changes after their effective date. For example, if an employee receives a rate increase effective 2/1/95 but you do not update it in Infinium HR until 6/1/95, you owe the employee a retroactive pay adjustment for the four months that he or she was paid at a lower rate.

You must type information in the *Employer* or *Employer Group* fields, along with the *Update Payroll, Report Order, As of Date* and *Sal. Chg. Reason* fields.

Employer

Type the value that identifies the employer within which you use step-in-grade processing.

If you want to apply step increases to employees in more than one employer, you can leave this field blank and use the *Employer Group* field instead.

Employer Group

Type the value that identifies the group of employers within which you use step-in-grade processing.

Level 1

If you entered a value in the *Employer* field, type a value to restrict step-in-grade processing to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's level 1 field in basic data and processes step movement only for employees assigned to the specified level 1.

Press F4 to display a list of valid level 1 codes within the specified employer. Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Level 2

If you entered a value in the *Employer* and *Level 1* fields, type a value to restrict step-in-grade processing to employees assigned to a particular level 2 within the specified level 1. The system compares the value you type in this field with the value in each employee's *Level 2* field in basic data and processes step movement only for employees within the specified level 2.

Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Level 3

If you entered a value in the *Employer, Level 1* and *Level 2* fields, type a value to restrict step-in-grade processing to employees assigned to a particular level 3 within the specified level 2. The system compares the value you type in this field with the value in each employee's *Level 3* field in basic data and processes step movement only for employees within the specified level 3.

Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Level 4

If you entered a value in the *Employer, Level 1*, *Level 2* and *Level 3* fields, type a value to restrict step-in-grade processing to employees to a particular level 4 within the specified level 3. The system compares the value you type in this field with the value in each employee's *Level 4* field in basic data and processes step movement only for employees in the specified level 4.

Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Pay Grade

Type the code that identifies the pay grade for which you want to process step progression. Leave this field blank if you want step-in-grade processing to apply to employees in all pay grades.

Pay Type

Type a value to restrict step-in-grade processing to employees of a specified pay type. The system compares the value you type in this field with the value in each employee's *Pay Type* field in basic data and processes step movement only for employees of the specified pay type.

Valid values are:

H	Hourly paid employees
S	Salaried exempt employees
N	Salaried non-exempt employees

Job Code

Type a job code to restrict step-in-grade processing to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code 1* field in basic data and processes step movement only for employees assigned to the specified job code.

Leave this field blank if you want step-in-grade processing to apply to employees in all jobs.

Union Code

Type a code value to restrict step-in-grade processing to employees assigned to a particular union code. The system compares the value you type in this field with the value in each employee's *Union* field in basic data and processes step movement only for employees assigned to the specified union code.

You use code type **UNI** to define code values for this field. Press F4 to display a list of valid union codes. Leave this field blank if you want step-in-grade processing to apply to employees regardless of union affiliation.

Method

Specify the type of pay grade steps to process.

Valid values:

1	Pay grade step with months only.
2	Pay grade step with hours only.
3	Pay grade step with months and hours.
blank	All pay grade steps.

Update Payroll

Use this field to indicate if the system should update one or more of the payroll rate fields on each employee's payroll data record when an employee moves from one step to the next step. In order for the system to process payroll rates when you use this field, your payroll administrator must allow personnel users to update payroll rates.

When you run the *Mass Update Employee Steps* function and type **0** or **1** in this field, the system uses the value in the *Pay Rate 1* field on the pay grade control to automatically update the employee's *Base Rate* field in his or her basic data record. If you have authority to update payroll rates, you can also have the system update rates in the employee's payroll data record as shown in the table below.

Fields on Pay Grade Control	Field Updated in Basic Data	Field Updated in Payroll Data
Pay Rate 1	*Base Rate*	*Pay Rate*
Pay Rate 2		*2nd Pay Rate*
Pay Rate 3		*3rd Pay Rate*

Valid values for this field are:

0 Do not update payroll rates; update only the *Base Rate* field in basic data.

1 Update the *Pay Rate* field in payroll data and the *Base Rate* field in basic data.

2 Update only the *2nd Pay Rate* in the *Update Employee Payroll Data* function.

3 Update only the *3rd Pay Rate* in the *Update Employee Payroll Data* function.

4 Update all payroll rates defined on the pay grade control and the *Base Rate* field in basic data.

The system creates a salary change transaction in the *Enter Personnel Actions* function for each rate that you update. For example, if you type **0**, **1**, **2** or **3** in the *Update Payroll* field, the system creates one salary change transaction. It fills the *Updt Payroll Rate* field on the salary change transaction with the value you type in the *Update Payroll* field.

If you type **4** in the *Update Payroll* field, the system creates three salary change transactions as follows:

- one for the *Base Rate* field in basic data and the *Pay Rate* in payroll data; the system stores **1** in the *Upd Payroll Rate* field on this salary change transaction
- one for the *2nd Pay Rate* field in payroll data; the system stores **2** in the *Upd Payroll Rate* field on this salary change transaction
- one for the *3rd Pay Rate* field in payroll data; the system stores **3** in the *Upd Payroll Rate* field on this salary change transaction

Report Order

Type the value that indicates the order in which the system lists employees on the report generated by this option.

Valid values for this field are:

1	Alphabetical by last name
2	By employee number

As of Date

Type the date the system should use to advance employees to their next step. The system uses this date differently depending on whether you enter months or hours criteria for steps on the pay grade control, as described below.

In addition to advancing employees to their next step, the system creates a salary change transaction within the *Enter Personnel Actions* function transaction for each employee to record the rate change(s) associated with the move to his or her next step. It uses the *As of Date* as the *SC Effective Date.*

If you establish months of service requirements for steps on the pay grade control, the system compares the *As of Date* to each employee's *Next Step Date* in the basic data record. The system advances employees whose *Next Step Date* is on or before the *As of Date.*

If you establish hours requirements for steps on the pay grade control, the system uses the *As of Date* and the date indicated by the *Date Frequency* field on the pay grade control to verify the hours stored in the employee's check history on Infinium PY.

The system uses the hours in payroll checks whose period ending dates are the same as or after the date indicated by the *Date Frequency* field on the pay grade control and the same as or before the *As of Date*. The system advances employees whose total hours of incomes in the specified income group meet or exceed the hours worked requirement.

If you enter both months and hours requirements on the pay grade control, the system waits until employees meet both criteria before they advance to their next step.

For example, you specify that employees on Step 1 of a particular pay grade must work 10 months and 1000 hours from their date of entry into this step before they can advance to Step 2. If an employee's current step date is 6-30-95, he or she cannot advance to Step 2 until on or after 4-30-96. In addition, he or she must have a total of at least 1000 hours of specified incomes in checks with period ending dates equal to or after 6-30-95 and the same as or before the *As of Date* specified on the *Mass Update Employee Steps* selection screen.

The system verifies the employee's hours worked on Infinium PY when you run the *Mass Update Employee Steps* function. In this example, when you run the *Mass Update Employee Steps* function with an effective date that is equal to or greater than 4-30-96 and the employee has accumulated 1000 hours in his or her income history since 6-30-95, the system advances the employee to Step 2.

Sal. Chg. Reason

Type the code value that identifies the reason for the employee's rate change. The system uses this code value to fill the *SC Reason* field when it generates salary change transactions within the *Enter Personnel Actions* function for affected employees. For example, you can define a value of **STEP** to differentiate salary changes produced by the *Mass Update Employee Steps* function from those you enter manually.

Press F4 to display a list of valid values. You define values using code type **SAL**.

Description

Type a description you want to associate with the salary change transactions that the system generates when you run the *Mass Update Employee Steps* function. The system transfers this information to the *Description* field in the salary change transaction created for each employee affected by the *Mass Update Employee Steps* function.

Comments

Type additional information regarding this step-in-grade change. The information entered here is stored in the *Comment* field of the associated salary change history transaction.

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 Trial

Update Employee Steps screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system uses batch processing to process the *Trial Update Employee Steps* function and generate the *Trial* Mass Update Employee Steps report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report using options on these screens. A sample of the report is shown on the following page.

The system generates the following warning message on the *Trial* Mass Update Employee Steps report for employees who reach the top regular step in their assigned pay grade:

*** NEXT “NEXT STEP” NOT FOUND - STEP INCREASE FREEZE FLAG TURNED ON.**

Since the system does not automatically move employees to steps you identify as off-scale steps on the pay grade control, the system generates this message when the employee reaches the top regular step, even though there may be additional “off-scale” steps defined on the pay grade control.

7 Examine the report that is generated. It lists the following information for each affected employee:

- Current pay grade
- New step
- New personnel base rate
- Personnel base rate increase amount
- Effective date of new step
- New payroll rate(s)
- Next step
- Next step date, if applicable (does not apply to steps with only hours worked requirements)

Use this information to verify that the system is advancing employees correctly to their next steps. If you find errors, make any necessary changes to employee basic data and rerun the *Trial Update Employee Steps* function as many times as necessary to obtain the correct results.

A sample of the report the system produces when you run the *Trial Update Employee Steps* function is shown on the next page.

```
PRGSIG10   PRTSIG10         * T R I A L *   M A S S   U P D A T E   E M P L O Y E E   S T E P S                     Page    1
 8/08/YY   14:12:17
EMPLOYER ZUS   SAMPLE US COMPANY
AS OF DATE      6/01/2007
                                 PAY   NEW         NEW PE          BASE RATE              ---------- NEW PAYROLL -----------
EMPLOYEE NAME       EMPLOYEE#  GRADE  STEP       BASE RATE        INCREASE           RATE 1           RATE 2           RATE 3
-----------------------------------------------------------------------------------------------------------------------------------
KANE,CANDY                1461  ACCT   02   DATE OF INCREASE  11/03/2000  NEXT STEP  03   NEXT STEP DATE   2/03/2001
                                                      20.0000   999222091.0011-        N/A              N/A              N/A
LAST,FIRST                3600  ACCT   02   DATE OF INCREASE   9/14/2001  NEXT STEP  03   NEXT STEP DATE  12/14/2001
                                                      20.0000          5.0000          N/A              N/A              N/A
TRAINING,TERESA           5757  ACCT   02   DATE OF INCREASE  11/04/2006  NEXT STEP  03   NEXT STEP DATE   2/04/2007
                                                      20.0000          5.0000          N/A              N/A              N/A
Area       100
Division   ADMIN
Department ACCT
Cost Centr 101      TOTAL CHANGED EMPLOYEES:          3             TOTAL BASE RATE INCREASE:  999222081.00-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
PLANYEAR,MORE             3569  ACCT   02   DATE OF INCREASE   8/01/2001  NEXT STEP  03   NEXT STEP DATE  11/01/2001
                                                    553.8462        538.8462          N/A              N/A              N/A
SMITH,SUSIE               2621  ACCT   05   DATE OF INCREASE   1/01/2001  NEXT STEP  06   NEXT STEP DATE   4/01/2001
                                                  36400.0000       5200.0000          N/A              N/A              N/A
Area       100
Division   ADMIN
Department ACCT
Cost Centr 102      TOTAL CHANGED EMPLOYEES:          2             TOTAL BASE RATE INCREASE:       5738.84
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
STEPGRADE,STEFFIE J      80270  ACCT   06   DATE OF INCREASE  10/01/1996  NEXT STEP
                                                      1.0000         24.0000-         N/A              N/A              N/A
    * NEXT "NEXT STEP" NOT FOUND - STEP INCREASE FREEZE FLAG TURNED ON
WEST,DAVID                4784  ACCT   02   DATE OF INCREASE   7/15/2003  NEXT STEP  03   NEXT STEP DATE  10/15/2003
                                                      20.0000          5.0000          N/A              N/A              N/A
Area       100
Division   ADMIN
Department ACCT
Cost Centr 104      TOTAL CHANGED EMPLOYEES:          2             TOTAL BASE RATE INCREASE:         19.00-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area       100
```

```
Area       100
Division   TRANS
Department TRUCK
Cost Centr 402      TOTAL CHANGED EMPLOYEES:          3             TOTAL BASE RATE INCREASE:      49735.40-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area       100
```

```
Division   TRANS
Department TRUCK    TOTAL CHANGED EMPLOYEES:          5             TOTAL BASE RATE INCREASE:      49721.37-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area       100
Division   TRANS    TOTAL CHANGED EMPLOYEES:          5             TOTAL BASE RATE INCREASE:      49721.37-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area       100      TOTAL CHANGED EMPLOYEES:         23             TOTAL BASE RATE INCREASE:  999266027.53-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
*...+....1....+....2....+....3....+....4....+....5....+....6....+....7....+....8....+....9....+....0....+....1....+....2....+....3
EMPLOYER ZUS        TOTAL CHANGED EMPLOYEES:         23             TOTAL BASE RATE INCREASE:  999266027.53-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
                                                 ***** E N D  O F  R E P O R T *****
```

Using Mass Update Employee Steps

After you obtain accurate results from the *Trial Update Employee Steps* function, run the *Mass Update Employee Steps* function. The *Mass Update Employee Steps* function updates employee basic data and payroll data records and writes salary change history transactions.

Follow these steps to run the *Mass Update Employee Steps* function.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Mass Update Step Data.*

3 Select *Mass Update Employee Steps* [MUES]. The system displays the screen shown in Figure 19-2.

```
10/27/09  13:58:36       Mass Update Employee Steps        PRGSG50    PRDSG50


Employer  . . . .  ___ +      -or-     Employer Group  .  _____ +

Level 1 . . . . .  _____ +             Level 2 . . . . .  _____ +
Level 3 . . . . .  _____ +             Level 4 . . . . .  _____ +

Pay Grade . . . .  _____ +             Pay Type  . . . .  _
Job Code  . . . .  _____ +             Union Code  . . .  _____ +
Method  . . . . .  _

Update Payroll  .  0  (0->4)           Report Order  . .  _  (1->2)

As of Date  . . .  _________           Sal.Chg. Reason .  _____ +
Description . . .  __________________
Comments  . . . .
____________________________________________________________________________




F3=Exit  F4=Prompt  F10=Access
```

Figure 19-2: Mass Update Employee Steps screen

4 Use the information beginning on page 19-5 to fill in the fields on this screen.

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 Mass Update Employee Steps screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system uses batch processing to process the Mass Update Employee Steps function and generate the Mass Update Employee Steps report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report using options on these screens. A sample of the report is shown on the following page.

The system generates the following warning message on the Mass Update Employee Steps report for employees who reach the top regular step in their assigned pay grade:

> *** NEXT "NEXT STEP" NOT FOUND - STEP INCREASE FREEZE FLAG TURNED ON.**

Since the system does not automatically move employees to steps you identify as off-scale steps on the pay grade control, the system generates this message when the employee reaches the top regular step, even though there may be additional off-scale steps defined on the pay grade control.

7 Examine the report that is generated. It lists the following information for each affected employee:

- Current pay grade
- New step
- New personnel base rate
- Personnel base rate increase amount
- Effective date of new step
- New payroll rate(s)
- Next step
- Next step date, if applicable (does not apply to steps with only hours worked requirements)

8 You can use the *Enter Personnel Actions, Display Salary Changes* or *Display Employee History* functions to view the salary change transactions the system generated when you ran the *Mass Update Employee Steps* function. The *Display Salary Changes* function presents salary change history information for many employees; the *Display Employee History* function presents an individual employee's salary change history.

There are many standard reports that include salary change history including List PE Actions, List PE Action Details, List PE Actions by Levels and List PE Actions by Employee. See the parts entitled "Displaying Employee History" and "Printing Employee History" for details.

A sample of the report the system generates when you run the *Mass Update Employee Steps* function is shown on the following page.

```
PRGSIG10   PRTSIG10                         M A S S   U P D A T E   E M P L O Y E E   S T E P S                          Page    1
 8/08/07   14:20:22
EMPLOYER ZUS   SAMPLE US COMPANY
AS OF DATE      6/01/2007
                                 PAY   NEW         NEW PE          BASE RATE              ---------- NEW PAYROLL -----------
EMPLOYEE NAME        EMPLOYEE#  GRADE  STEP       BASE RATE         INCREASE            RATE 1           RATE 2           RATE 3
----------------------------------------------------------------------------------------------------------------------------------
KANE,CANDY                1461  ACCT   02   DATE OF INCREASE  11/03/2000  NEXT STEP  03   NEXT STEP DATE   2/03/2001
                                                      20.0000   999222091.0011-         N/A              N/A              N/A
LAST,FIRST                3600  ACCT   02   DATE OF INCREASE   9/14/2001  NEXT STEP  03   NEXT STEP DATE  12/14/2001
                                                      20.0000           5.0000          N/A              N/A              N/A
TRAINING,TERESA           5757  ACCT   02   DATE OF INCREASE  11/04/2006  NEXT STEP  03   NEXT STEP DATE   2/04/2007
                                                      20.0000           5.0000          N/A              N/A              N/A
Area       100
Division   ADMIN
Department ACCT
Cost Centr 101      TOTAL CHANGED EMPLOYEES:          3              TOTAL BASE RATE INCREASE:  999222081.00-
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
PLANYEAR,MORE             3569  ACCT   02   DATE OF INCREASE   8/01/2001  NEXT STEP  03   NEXT STEP DATE  11/01/2001             - - - - - - - - -
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area 100
Division OPS
Department LAB TOTAL CHANGED EMPLOYEES: 1 TOTAL BASE RATE INCREASE: .25
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area 100
Division OPS TOTAL CHANGED EMPLOYEES: 1 TOTAL BASE RATE INCREASE: .25
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Area 100 TOTAL CHANGED EMPLOYEES: 4 TOTAL BASE RATE INCREASE: 1.00
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
EMPLOYER ZUS TOTAL CHANGED EMPLOYEES: 4 TOTAL BASE RATE INCREASE: 1.00
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
-------------------------------------------------------------------------------------------------------------------------------------
                                                       14.6000          3.0500          N/A              N/A              N/A
 Area       100
 Division   TRANS
 Department TRUCK
 Cost Centr 402      TOTAL CHANGED EMPLOYEES:          3              TOTAL BASE RATE INCREASE:      49735.40-
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
 Area       100
 Division   TRANS
 Department TRUCK    TOTAL CHANGED EMPLOYEES:          5              TOTAL BASE RATE INCREASE:      49721.37-
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
 Area       100
 Division   TRANS    TOTAL CHANGED EMPLOYEES:          5              TOTAL BASE RATE INCREASE:      49721.37-
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
 Area       100      TOTAL CHANGED EMPLOYEES:         23              TOTAL BASE RATE INCREASE:  999266027.53-
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
 EMPLOYER ZUS        TOTAL CHANGED EMPLOYEES:         23              TOTAL BASE RATE INCREASE:  999266027.53-
```

- -

***** E N D O F R E P O R T *****

Updating Step Rates

If you need to change the rates associated with steps on existing pay grade controls, you can use the *Update Pay Grade and Steps* function to manually update the steps with new rates, or you can use the *Mass Update Step Rates* function to update the rates automatically through batch processing. You can use the *Mass Update Step Rates* function if you need to apply the same dollar or percentage increase to all of the step rates, or to all of the step rates after a specified starting step. The system does not apply rate changes to exception steps for which you entered **1** in the *Off Scale?* field on the pay grade control.

For example, you have defined a pay grade that has ten steps; step 10 is an off-scale step for exception employees. You now need to increase Step 2 by $.50, and all subsequent steps except Step 10 by $.25. The *Mass Update Step Rates* function applies the rate changes you specify and does not increase the rates for Steps 1 or 10. It allows you to accomplish these step rate changes through batch processing rather than typing the changes individually for each step rate.

Regardless of whether you update step rates manually or through the *Mass Update Step Rates* function, the system does not apply the new rates to step-in-grade employees until you use the *Mass Update Employee Step Rates* function.

You can use the *Trial Update Step Rates* function to preview the changes the system will make when you run the *Mass Update Step Rates* function. The *Trial Update Step Rates* function produces a report that you review and use to verify the changes the system will make when you run the *Mass Update Step Rates* function.

The system also generates a report when you run the *Mass Update Step Rates* function to verify the changes that you made.

Using Trial Update Step Rates

Follow these steps to access the *Trial Update Step Rates* function.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Mass Update Step Data.*

3 Select *Trial Update Step Rates* [TUSR]. The system displays the screen shown in Figure 19-3.

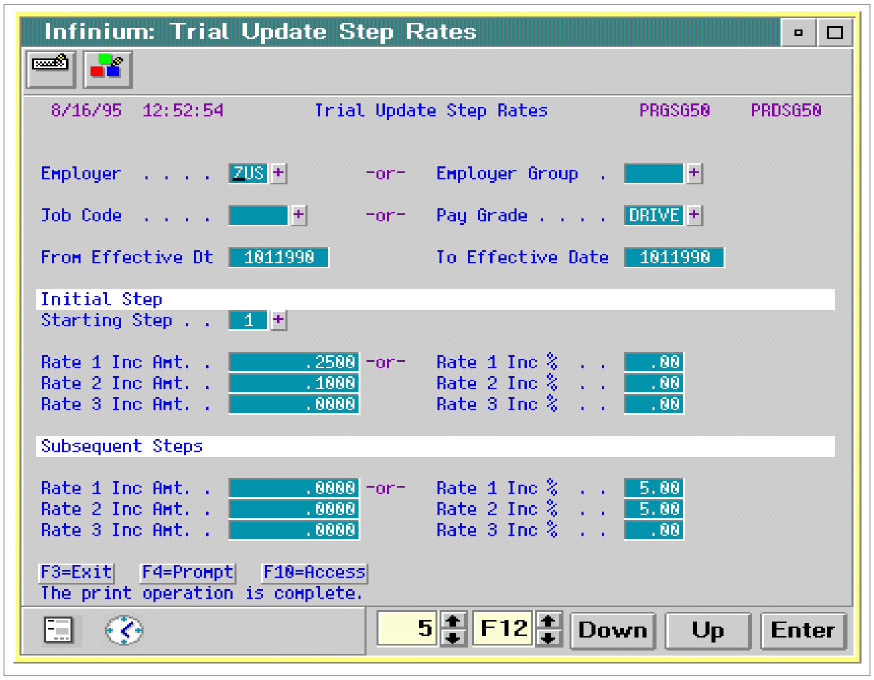


Figure 19-3: Trial Update Step Rates screen

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

You use this screen to specify the pay grades within which you want to increase step rates. You can update the rates for all of the steps in the specified pay grade(s) or the rates for only the specified initial step and subsequent steps. For each step you can update pay rates 1, 2, and/or 3.

You must type information in the *Employer* or *Employer Group* fields and the *From Effective Dt* and *To Effective Date* fields. You must also enter information in either the *Inc Amt* or *Inc %* fields within the Initial Step section in the middle of the screen for one or more of the pay rates defined for the specified step on the pay grade control.

Employer

Type the value that identifies the employer within which you want to update step rates. You must enter information in this field or the *Employer Group* field. Press F4 to display a list of valid employers.

Employer Group

Type the value that identifies the group of employers for which you want to update step rates. You must enter information in this field or the *Employer* field. You use code type **ERG** to define employer groups. Press F4 to display a list of valid employer groups.

Job Code

Type the value that identifies the job for which you want to update step rates. The system references the specified job control record and updates the rates for the pay grade associated with the job control. Press F4 to display a list of valid job controls. This is an optional field. Leave this field blank if you do not want to use job controls to specify pay grades.

You may find this field useful for updating step rates if you have defined unique combinations of different positions with a particular job and associated a different pay grade with each combination. This special combination is referred to as a tie-back and is discussed in detail in the *Infinium HR Guide to Controls*. The following paragraph briefly describes how you define tie-back positions and how the *Trial Update Step Rates* function affects tieback positions when you specify a value in the *Job Code* field.

In this example, you define job code **MECH** to identify mechanics and attach pay grade **A** to the job control. You associate three positions with this job: **APMECH** (Apprentice Mechanic), **MECH** (Mechanic) and **JRMECH** (Journeyman Mechanic). The first two positions reference the generic job and use pay grade A. You then define a special version of the **MECH** job in combination with the **JRMECH** position and associate pay grade **B** with this unique combination of job and position. If you type **MECH** in the *Job Code* field, the system updates the step rates associated with both pay grade A and pay grade B, since both pay grades are associated with the **MECH** job.

If you enter a value in the *Job Code* field, you cannot make an entry in the *Pay Grade* field.

Pay Grade

Type the code that identifies the pay grade you want to update with new step rates. Press F4 to display a list of valid pay grades. Leave this field blank if you want to update all pay grades that meet the other specifications on this screen.

From Effective Dt

Type the date that corresponds to the earliest effective date of pay grades for which you want to update step rates. The system checks the *Effective Date* field on the pay grade control record to determine which pay grades to include in the *Trial Update Step Rates* function.

For example, you define pay grade C twice. You type an effective date of 3/1/90 for one version of the pay grade and 3/1/93 for the second version. If you type 1/1/93 in the *From Effective Dt* field, the system updates only the second version of pay grade C.

To Effective Date

Type the date that corresponds to the latest effective date of pay grades for which you want to update step rates. The system checks the *Effective Date* field on the pay grade control record to determine which pay grades to include in the *Trial Update Step Rates* function.

If you do not enter values in the *Job code* or *Pay Grade* fields on this screen, the system updates the step rates of all pay grades whose effective dates are equal to or after the date you enter in the *From Effective Dt* field and equal to or prior to the date you enter in the *To Effective Date* field.

“Initial Step” Section

The following information describes the seven fields in the Initial Step section of this screen. The system applies the amount or percent increases you specify in this section of the screen to only the step you identify in the *Starting Step* field.

Starting Step

Type the first step in the specified pay grade(s) to which the system should apply the increase. You can enter any step on the pay grade in this field. You can update only this step, or you can update all subsequent steps in the specified pay grade(s).

If you leave this field blank but type an amount or rate into the fields in the Initial Step section of the screen, the system applies the increase to the first step defined for the specified pay grade(s). If you leave this field and the related amount or percent increase fields blank in the “Initial Step” portion of the screen, the system skips the first step in each pay grade when you run the *Trial Update Step Rates* function.

Rate 1 Inc Amt

Type the amount by which the system should increase the rate defined in the *Pay Rate 1* field for the specified starting step on the selected pay grade(s). You can specify either an amount increase in this field or a percent increase in the *Rate 1 Inc %* field.

The amount you enter in this field should correspond to the way the *Pay Rate 1* field is defined on the specified pay grade. For example, if *Pay Rate 1* is stated as an hourly rate on the pay grade control, the amount typed in the *Rate 1 Inc. Amt* field on this screen should also be an hourly amount.

Rate 2 Inc Amt

Type the amount by which the system should increase the rate defined in the *Pay Rate 2* field for the specified starting step on the selected pay grade(s). You can specify either an amount increase in this field or a percent increase in the *Rate 2 Inc %* field.

The amount you enter in this field should correspond to the way the *Pay Rate 2* field is defined on the specified pay grade. For example, if *Pay Rate 2* is stated as a weekly rate on the pay grade control, the amount typed in the *Rate 1 Inc. Amt* field on this screen should also be a weekly amount.

Rate 3 Inc Amt

Type the amount by which the system should increase the rate defined in the *Pay Rate 3* field for the specified starting step on the selected pay grade(s). You can specify either an amount increase in this field or a percent increase in the *Rate 3 Inc %* field.

The amount you enter in this field should correspond to the way the *Pay Rate 3* field is defined on the specified pay grade. For example, if *Pay Rate 3* is stated as a monthly rate on the pay grade control, the amount typed in the *Rate 1 Inc. Amt* field on this screen should also be a monthly amount.

Rate 1 Inc %

Type the percentage by which the system should increase the rate defined in the *Pay Rate 1* field on the specified pay grade(s). You can specify either a percent increase in this field or an amount increase in the *Rate 1 Inc Amt* field.

Rate 2 Inc %

Type the percentage by which the system should increase the rate defined in the *Pay Rate 2* field on the specified pay grade(s). You can specify either a percent increase in this field or an amount increase in the *Rate 2 Inc Amt* field.

Rate 3 Inc %

Type the percentage by which the system should increase the rate defined in the *Pay Rate 3* field on the specified pay grade(s). You can specify either a percent increase in this field or an amount increase in the *Rate 3 Inc Amt* field.

You normally specify a starting step and an amount or percent increase for one of the pay rates associated with that step. If you leave the *Starting Step* field blank along with all of the increase amount or percent fields in the “Initial

Step" section of this screen, the system displays the following warning message when you press Enter on this screen:

Initial step increase rates/percentages not entered - F21 to accept.

You can fill in the *Starting Step* field along with the appropriate increase amount or percent values, or you can press F21 to begin processing the *Trial Update Step Rates* function. The system skips the first step defined for the specified pay grade(s) when you leave the *Starting Step* field and all of the related increase amount or percent fields blank.

Subsequent Steps Section

The following information is about the six fields in the "Subsequent Steps" section of this screen. The system applies the amount or percent increases you specify in this section of the screen to all of the steps in the selected pay grade(s) that are a higher numeric value than the step you identify in the *Starting Step* field.

For example, if you indicate that Step 3 is the Starting Step, the system applies increases you type in this section of the screen to Steps 4 and above in the selected pay grade(s).

Rate 1 Inc Amt

Type the amount by which the system should increase the rate defined in the *Pay Rate 1* field for all steps after the specified starting step in the specified pay grade(s). You can specify either an amount increase in this field or a percent increase in the *Rate 1 Inc %* field.

Leave this field blank if you do not want the system to increase the current *Pay Rate 1* values for all steps after the specified starting step in the selected pay grade(s).

If you type in this field, the amount you enter should correspond to the way the *Pay Rate 1* field is defined on the specified pay grade. For example, if *Pay Rate 1* is stated as an hourly rate on the pay grade control, the amount typed in the *Rate 1 Inc. Amt* field on this screen should also be an hourly amount.

Rate 2 Inc Amt

Type the amount by which the system should increase the rate defined in the *Pay Rate 2* field for all steps after the specified starting step on the specified pay grade(s). You can specify either an amount increase in this field or a percent increase in the *Rate 2 Inc %* field.

Leave this field blank if you do not use the *Pay Rate 2* field or you do not want the system to increase the current *Pay Rate 2* values for all steps after the specified starting step in the selected pay grade(s).

If you type in this field, the amount you enter should correspond to the way the *Pay Rate 2* field is defined on the specified pay grade. For example, if *Pay Rate 2* is stated as a weekly rate on the pay grade control, the amount typed in the *Rate 2 Inc. Amt* field on this screen should also be a weekly amount.

Rate 3 Inc Amt

Type the amount by which the system should increase the rate defined in the *Pay Rate 3* field for all steps after the specified starting step on the specified pay grade(s). You can specify either an amount increase in this field or a percent increase in the *Rate 3 Inc %* field.

Leave this field blank if you do not use the *Pay Rate 3* field or you do not want the system to increase the current *Pay Rate 3* values for all steps after the specified starting step in the selected pay grade(s).

If you type in this field, the amount you enter should correspond to the way the *Pay Rate 3* field is defined on the specified pay grade. For example, if *Pay Rate 3* is stated as a monthly rate on the pay grade control, the amount typed in the *Rate 3 Inc. Amt* field on this screen should also be a monthly amount.

1. After you type information in the selection field(s) you require, press Enter. The system produces the following message at the bottom of the Trial Update Step Rates screen and returns you to the Infinium HR main menu:

   Building submission request...

2. The system uses batch processing to process the *Trial Update Step Rates* function and generate the *Trial* Mass Update Step-in-Grade Pay Rates report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report using options on these screens. A sample of the report is shown on the following page.

3. Examine the report that is generated. It lists the following information for each affected step in the specified pay grade(s):

   - Pay grade
   - Step number
   - Pay grade effective date
   - Pay rate 1 before change

- Pay rate 2 before change
- Pay rate 3 before change
- Pay rate 1 after change
- Pay rate 2 after change
- Pay rate 3 after change

Use this information to verify that the system correctly processes the step rate increases you specified. If you find errors, make any necessary changes to Trial Update Step Rates selection screen and rerun the *Trial Update Step Rates* function as many times as necessary to obtain the correct results.

A sample of the report the system generates when you run the *Trial Update Step Rates* function is shown on the following page.

```
PRGSIG15   PRTSIG15     * T R I A L *   M A S S   U P D A T E   S T E P - I N - G R A D E   P A Y   R A T E S           PAGE   1
 8/08/07   14:23:15
EMPLOYER   ZUS       SAMPLE US COMPANY
 PAY       STEP     EFFECTIVE     ---------------- BEFORE CHANGE ---------------     ---------------- AFTER CHANGE ---------------
 GRADE      NO        DATE        PAY RATE 1       PAY RATE 2       PAY RATE 3       PAY RATE 1       PAY RATE 2       PAY RATE 3
-----------------------------------------------------------------------------------------------------------------------------------
    TOTAL PAY GRADES:
```

Using Mass Update Step Rates

After you obtain accurate results from the *Trial Update Step Rates* function, run the *Mass Update Step Rates* function. The *Mass Update Step Rates* function updates step rates on the pay grade control(s) you specify.

After you complete the *Mass Update Step Rates* function, you use the *Mass Update Employee Step Rates* function to update the basic data and payroll data records of employees with the new rates.

Follow these steps to run the *Mass Update Step Rates* function.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Mass Update Step Data.*

3 Select *Mass Update Step Rates* [MUSR]. The system displays the screen shown in Figure 19-4.

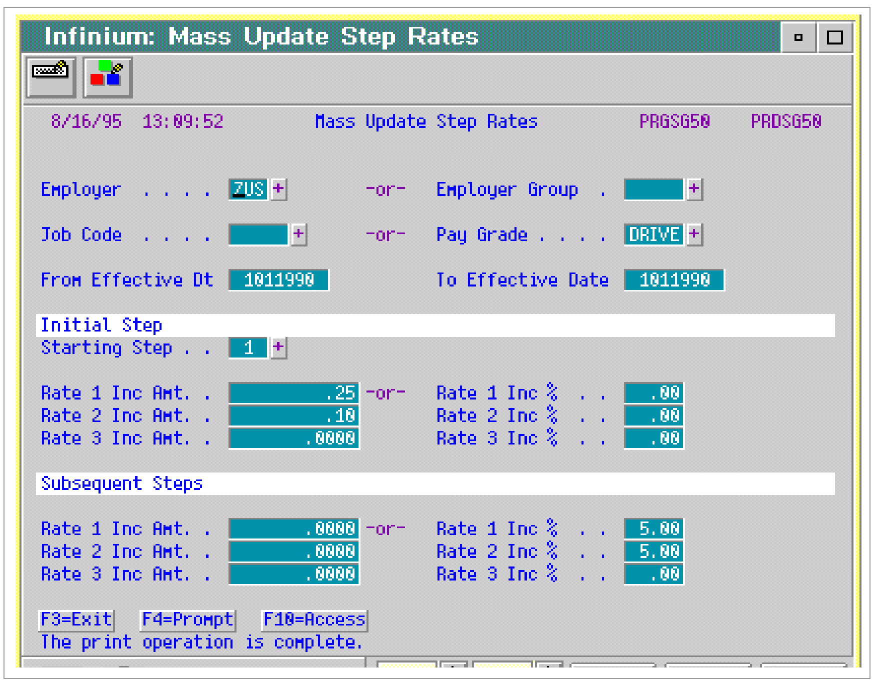


Figure 19-4: Mass Update Step Rates screen

4 Use the information beginning on page 19-23 to fill in the fields on this screen.

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 Mass Update Step Rates screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system uses batch processing to process the *Mass Update Step Rates* function and generate the Mass Update Step-in-Grade Pay Rates report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report using options on these screens. A sample of the report is shown on the following page.

```
PRGSIG15   PRTSIG15                     M A S S   U P D A T E   S T E P - I N - G R A D E   P A Y   R A T E S            PAGE   1
 8/08/07   14:24:31
EMPLOYER   ZUS       SAMPLE US COMPANY
 PAY       STEP     EFFECTIVE     ---------------- BEFORE CHANGE ---------------     ---------------- AFTER CHANGE ---------------
 GRADE      NO        DATE        PAY RATE 1       PAY RATE 2       PAY RATE 3       PAY RATE 1       PAY RATE 2       PAY RATE 3
-----------------------------------------------------------------------------------------------------------------------------------
    TOTAL PAY GRADES:
```

Updating Employee Step Rates

After you update step rates on the pay grade control record, you use the *Mass Update Employee Step Rates* function to pass the step rate increases along to employees assigned to the affected pay grades and steps. The *Mass Update Employee Step Rates* function does not change the step to which an employee is assigned, it only updates the rate(s) associated with the employee's current step.

When you use the *Mass Update Employee Step Rates* function to update an employee's rates, the system automatically creates a salary change transaction in the employee's personnel actions history records. You use the *As of Date* field on the selection screen of the *Mass Update Employee Step Rates* function to specify the Salary change transaction effective date for historical purposes.

Unlike the salary change transactions you enter in the *Enter Personnel Actions* function, the system does not apply future-dated processing to salary change transactions created by the *Mass Update Employee Step Rates* function. When you run the *Mass Update Employee Step Rates* function, the system immediately updates the employee's *Base Rate* field in basic data and his or her payroll rates in payroll data, if applicable, regardless of the *As of Date* you specify.

You can use the *Trial Update Employee Step Rates* function to preview the changes the system will make when you run the *Mass Update Employee Step Rates* function. The *Trial Update Employee Step Rates* function produces a report that you review and use to make any necessary changes to employee information or the criteria you specify on the selection screen when you run the *Mass Update Employee Step Rates* function. The *Trial Update Employee Step Rates* function does not make any changes to employee data.

The Trial report lists the employee's anticipated new rate(s) and also lists employees who will not receive the updated rates because the new rate(s) on the pay grade control are lower than the employee's current rate(s).

The system generates a similar report when you run the *Mass Update Employee Step Rates* function. The report identifies the employees whose step rates changed and those for whom rate changes were not applied because the new step rates on the pay grade control were lower than the employee's current rate(s). If necessary, you can use the salary change transaction in the *Enter Personnel Actions* function to make manual changes to these employees' rates.

The system applies step rate changes to all employees in the specified pay grade, even if the *Freeze Step?* field on an employee's basic data record is **1**, indicating that the employee cannot progress to his or her next step. The *Mass Update Employee Step Rates* function also applies step increases to employees in off-scale steps, if you enter a rate for the off-scale step in the pay grade control that is different from the current rate(s) of employees assigned to the off-scale step.

Follow these steps to run the *Mass Update Step Rates* function.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Mass Update Step Data.*

3 Select *Trial Update Employee Step Rates* [TUESR]. The system displays the screen shown in Figure 19-5.

```
 5/21/03  12:58:28    Trial Update Employee Step Rates     PRGSG50    PRDSG50


Employer  . . . .  ZUS +      -or-     Employer Group  .  _____ +

Level 1 . . . . .  _____ +             Level 2 . . . . .  _____ +
Level 3 . . . . .  _____ +             Level 4 . . . . .  _____ +

Pay Grade . . . .  DRIVE +             Pay Type  . . . .  _
Job Code  . . . .  _____ +             Union Code  . . .  _____ +
Method  . . . . .  _

Update Payroll  .  4  (0->4)           Report Order  . .  1  (1->2)

As of Date  . . .  10152003            Sal.Chg. Reason .  CONTR +
Description . . .  UNION CONTRACT
Comments  . . . .
UNION CONTRACT RATE CHANGE



F3=Exit   F4=Prompt   F10=Access
```

Figure 19-5: Trial Update Employee Step Rates screen

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

You use this function to update the employee's *Base Rate* field in basic data with the new rate associated with his or her step on the pay grade control. If you are authorized to update payroll rates, you can also use this function to update the employee's payroll rate(s) in payroll data based on the new rate(s) on the pay grade control.

You must type information in the *Employer* or *Employer Group fields,* along with the *Update Payroll, Report Order, As of Date,* and *Sal. Chg. Reason* fields.

Employer

Type the value that identifies the employer within which you want to update employee step rates. You must enter information in this field or the *Employer Group* field. Press F4 to display a list of valid employers.

If you want to apply step rate changes to employees in more than one employer, you can leave this field blank and use the *Employer Group* field instead.

Employer Group

Type the value that identifies the group of employers for which you want to update employee step rates. You must enter information in this field or the *Employer* field. You use code type **ERG** to define employer groups. Press F4 to display a list of valid employer groups.

Level 1

If you entered a value in the *Employer* field, type a value to restrict the update of step rates to employees assigned to a particular level 1. The system compares the value you type in this field with the value in each employee's level 1 field in basic data and updates step rates only for employees assigned to the specified level 1.

Press F4 to display a list of valid level 1 codes within the specified employer. Leave this field blank if you want to apply updated step rates to employees in all levels.

Level 2

If you entered a value in the *Employer* and *Level 1* fields, type a value to restrict the update of step rates to employees assigned to a particular level 2 within the specified level 1. The system compares the value you type in this field with the value in each employee's level 2 field in basic data and updates step rates only for employees within the specified level 2.

Press F4 to display a list of valid level 2 values within the specified level 1 grouping. Leave this field blank if you want to apply updated step rates to employees in all levels.

Level 3

If you entered a value in the *Employer, Level 1* and *Level 2* fields, type a value to restrict the update of step rates to employees assigned to a particular level 3 within the specified level 2. The system compares the value you type in this field with the value in each employee's level 3 field in basic data and updates step rates only for employees within the specified level 3.

Press F4 to display a list of valid level 3 codes within the specified level 2 grouping. Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Level 4

If you entered a value in the *Employer, Level 1*, *Level 2* and *Level 3* fields, type a value to restrict the update of step rates to employees assigned to a particular level 4 within the specified level 3. The system compares the value you type in this field with the value in each employee's level 4 field in basic data and updates step rates only for employees in the specified level 4.

Press F4 to display a list of valid level 4 codes within the specified level 3 grouping. Leave this field blank if you want step-in-grade processing to apply to employees in all levels.

Pay Grade

Type the value that identifies the pay grade for which you want to update step rates. The system matches this value to that in the *Pay Grade* field in each employee's basic data record and only updates the step rates of employees assigned to the specified pay grade. Press F4 to display a list of valid pay grade codes.

Leave this field blank if you want to update step rates for employees in all pay grades.

Pay Type

Type a value to restrict step-in-grade processing to employees of a specified pay type. The system compares the value you type in this field with the value in each employee's *Pay Type* field in basic data and updates step rates only for employees of the specified pay type.

Valid values are:

H	Hourly paid employees
S	Salaried exempt employees
N	Salaried non-exempt employees

Job Code

Type the value that identifies a job to restrict the update of step rates to employees assigned to that job. The system compares the value you type in this field with the value in each employee's *Job Code 1* field in basic data and updates step rates only for employees assigned to the specified job code.

Press F4 to display a list of valid job codes. Leave this field blank if you want to update step rates for employees in all jobs.

You may find this field useful for updating employee step rates if you have defined unique combinations of different positions with a particular job and associated a different pay grade with each combination. This special combination is referred to as a tie-back and is discussed in detail in the *Infinium HR Guide to Controls*. The following paragraph briefly describes how you define tie-back positions and how the *Trial Update Employee Step Rates* function affects employees in tieback positions when you specify a value in the *Job Code* field.

In this example, you define job code **MECH** to identify mechanics and attach pay grade **A** to the job control. You associate three positions with this job: **APMECH** (Apprentice Mechanic), **MECH** (Mechanic) and **JRMECH** (Journeyman Mechanic). The first two positions reference the generic job and use pay grade A. You then define a special version of the **MECH** job in combination with the **JRMECH** position and associate pay grade **B** with this unique combination of job and position. You hire an employee into each position. Two employees are assigned to pay grade A and one is assigned to pay grade B.

If you type **MECH** in the *Job Code* field, the system updates the step rates of all three employees, since they are all assigned to the **MECH** job regardless of their position or pay grade.

If you enter a value in the *Job Code* field, you cannot make an entry in the *Pay Grade* field.

Union Code

Type a code value to restrict step-in-grade processing to employees assigned to a particular union code. The system compares the value you type in this field with the value in each employee's *Union* field in basic data and only updates step rates for employees assigned to the specified union code.

You use code type **UNI** to define code values for this field. Press F4 to display a list of valid union codes. Leave this field blank if you want step-in-grade processing to apply to employees regardless of union affiliation.

Method

Specify the type of pay grade steps to process.

Valid values:

1	Pay grade step with months only.
2	Pay grade step with hours only.
3	Pay grade step with months and hours.
blank	All pay grade steps.

Update Payroll

Use this field to indicate if the system should update one or more of the payroll rate fields on each employee's payroll data record when the rates change on the pay grade control. In order for the system to update payroll rates, your payroll administrator must give Infinium HR users authority to update payroll rates.

When you run the *Mass Update Employee Steps* function and type **0** or **1** in this field, the system uses the value in the *Pay Rate 1* field for the appropriate step on the pay grade control to automatically update the employee's *Base Rate* field in his or her basic data record. If you have authority to update payroll rates, you can also have the system update rates in the employee's payroll data record as shown in the table below.

Fields on Pay Grade Control	Field Updated in Basic Data	Field Updated in Payroll Data
Pay Rate 1	*Base Rate*	*Pay Rate*
Pay Rate 2		*2nd Pay Rate*
Pay Rate 3		*3rd Pay Rate*

Valid values for this field are:

0	Do not update payroll rates; update only the *Base Rate* field in basic data.
1	Update the *Pay Rate* field in payroll data and the *Base Rate* field in basic data.
2	Update only the *2nd Pay Rate* in the *Update Employee Payroll Data* function.

3	Update only the *3rd Pay Rate* in the *Update Employee Payroll Data* function.
4	Update all payroll rates and the *Base Rate* field in basic data.

The system creates a salary change transaction in the *Enter Personnel Actions* function for each rate that you update. For example, if you type **0**, **1**, **2** or **3** in the *Update Payroll* field, the system creates one salary change transaction. It fills the *Updt Payroll Rate* field on the salary change transaction with the value you type in the *Update Payroll* field.

If you type **4** in the *Update Payroll* field, the system creates three salary change transactions as follows:

- one for the *Base Rate* field in basic data and the *Pay Rate* in payroll data; the system stores **1** in the *Upd Payroll Rate* field on this salary change transaction
- one for the *2nd Pay Rate* field in payroll data; the system stores **2** in the *Upd Payroll Rate* field on this salary change transaction
- one for the *3rd Pay Rate* field in payroll data; the system stores **3** in the *Upd Payroll Rate* field on this salary change transaction

Report Order

Type the value that indicates the order in which the system lists employees on the report generated by this option.

Valid values for this field are:

1	Alphabetical by last name
2	By employee number

As of Date

Type the effective date the system should use when it creates the salary change transaction in the *Enter Personnel Actions* function to record the employee's step rate change in history. The system uses the *As of Date* as the *SC Effective Date.* The system updates the step rates of employees regardless of the *As of Date* you specify.

Unlike the salary change transactions you type in the Enter Personnel Actions function, the system does not apply future-dated processing to salary change transactions created by the Mass Update Employee Step Rates function. When you run the Mass Update Employee Step Rates function, the system immediately updates the employee's Base Rate field in basic data and his or her payroll rates in payroll data, if applicable, regardless of the As of Date you specify.

Type the code value that identifies the reason for the employee’s step rate change. The system uses this code value to fill the SC Reason field when it generates salary change transactions within the Enter Personnel Actions function for affected employees. For example, you can define a value of **STEPR** to differentiate salary changes produced by the Mass Update Employee Step Rates function from those you enter manually.

Press F4 to display a list of valid values. You define values using code type **SAL**.

Description

Type a description you want to associate with the salary change transactions the system generates when you run the *Mass Update Employee Step Rates* function. The system transfers this information to the *Description* field in the salary change transaction created for each employee affected by the *Mass Update Employee Step Rates* function.

Comments

Type additional information regarding this step-in-grade change. The information entered here is stored in the *Comment* field of the associated salary change history transaction.

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 Trial Update Employee Step Rates screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system uses batch processing to process the *Trial Update Employee Step Rates* function and generate the *Trial* Mass Update Employee Step Rates report. The report lists all employees in the specified pay grades and indicates if their rates will be updated.

Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report using options on these screens. A sample of the report is shown on the following page.

The system generates the following warning messages on the *Trial *Mass Update Employee Steps report for employees whose current rates will not updated by the *Mass Update Employee Step Rates* function:

- For employees whose current rates are higher than the new rates established for his or her step on the pay grade control:

  *** UPDATES THAT WOULD RESULT IN A RATE DECREASE NOT APPLIED.**

- For employees assigned to an off-scale step for which there is no rate defined on the pay grade control:

  *** NO RATE INCREASES IDENTIFIED, RECORD NOT UPDATED**

The system uses an asterisk (*) to identify the current rates of employees that are not updated by the *Mass Update Employee Step Rates* function.

7 Examine the report that is generated. It lists the following information for each affected employee:

- Current pay grade
- Current step
- New personnel base rate
- Personnel base rate increase amount
- New payroll rate(s)

Use this information to verify that the system is correctly updating employee step rates. If you find errors, make any necessary changes to the pay grade control or employee basic data and rerun the *Trial Update Employee Step Rates* function as many times as necessary to obtain the correct results.

A sample of the report the system generates when you run the *Trial Update Employee Step Rates* function is shown on the following page.

```
PRGSIG20   PRTSIG20        * T R I A L *   M A S S   U P D A T E   E M P L O Y E E   S T E P   R A T E S             Page    1
 8/08/07   14:25:28
EMPLOYER ZUS   SAMPLE US COMPANY
AS OF DATE      6/01/2007
                                   PAY             NEW PE          BASE RATE           ------------- NEW PAYROLL -------------
EMPLOYEE NAME       EMPLOYEE#    GRADE  STEP     BASE RATE         INCREASE          RATE 1           RATE 2           RATE 3
-----------------------------------------------------------------------------------------------------------------------------------
DMY,TEST                 11070    KAF     01  443210100.8700  *         .0000          N/A              N/A              N/A
    * UPDATES THAT WOULD RESULT IN A RATE DECREASE NOT APPLIED
DMY,QA                   11072    KAF     01  877009809.6000   433799708.7300          N/A              N/A              N/A
EMERGENCY,ERNIE          11073    KAF     01  877009809.6000   433799708.7300          N/A              N/A              N/A
ENGLISH,SAM          000005613    KAF     01   16865573.2615    16865533.2615          N/A              N/A              N/A
KC218,KC10121040           511    HOUR1   09         22.1500           6.2880          N/A              N/A              N/A
    * NO RATE INCREASES IDENTIFIED, RECORD NOT UPDATED
LAWRENCE,KAMA             3097    KAF     03  361916982.4000        4160.0000          N/A              N/A              N/A
    * NO RATE INCREASES IDENTIFIED, RECORD NOT UPDATED
SPANISH,SAM          000005616    HOUR1   01         40.0000  *         .0000          N/A              N/A              N/A
    * UPDATES THAT WOULD RESULT IN A RATE DECREASE NOT APPLIED
TEST,MDY                 11071    KAF     01  877009809.6000   433799708.7300          N/A              N/A              N/A

 EMPLOYER ZUS       TOTAL CHANGED EMPLOYEES:          6             TOTAL BASE RATE INCREASE:  318337059.45
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
                                                  ***** E N D  O F  R E P O R T *****
```

Using Mass Update Employee Step Rates

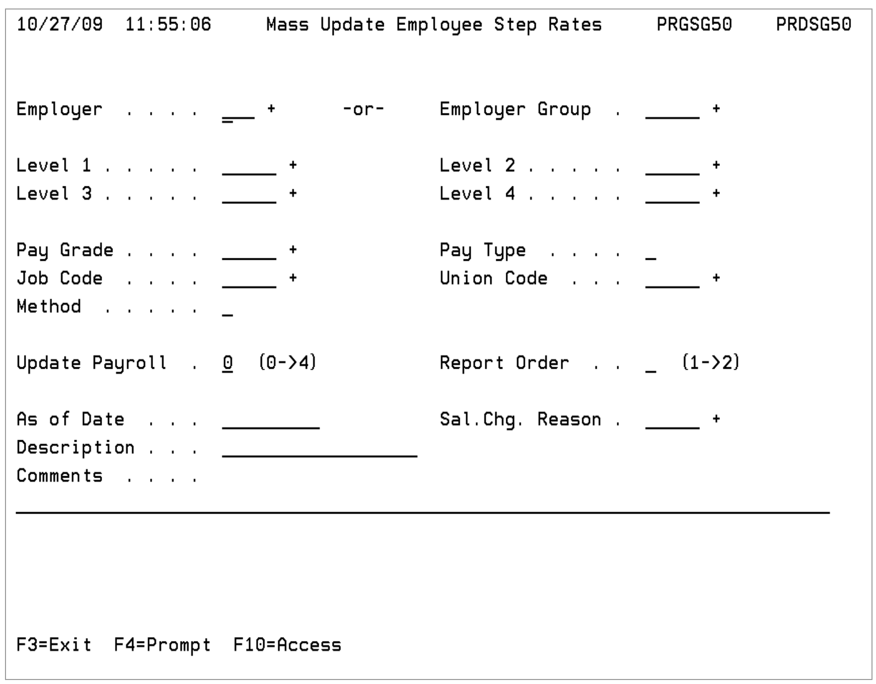
After you obtain accurate results from the *Trial Update Employee Step Rates* function, run the *Mass Update Employee Step Rates* function. The *Mass Update Employee Step Rates* function updates employee basic data and payroll data records and writes salary change history transactions.

Follow these steps to run the *Mass Update Employee Step Rates* function.

1 From the Infinium HR main menu select *Step-in-Grade Operations.*

2 Select *Mass Update Step Data.*

3 Select *Mass Update Employee Step Rates* [MUESR]. The system displays the screen shown in Figure 19-6.



```
10/27/09  11:55:06     Mass Update Employee Step Rates     PRGSG50    PRDSG50


Employer  . . . .  ___ +      -or-     Employer Group  .  _____ +

Level 1 . . . . .  _____ +             Level 2 . . . . .  _____ +
Level 3 . . . . .  _____ +             Level 4 . . . . .  _____ +

Pay Grade . . . .  _____ +             Pay Type  . . . .  _
Job Code  . . . .  _____ +             Union Code  . . .  _____ +
Method  . . . . .  _

Update Payroll  .  0  (0->4)           Report Order  . .  _  (1->2)

As of Date  . . .  _________           Sal.Chg. Reason .  _____ +
Description . . .  __________________
Comments  . . . .
____________________________________________________________________________




F3=Exit  F4=Prompt  F10=Access
```

Figure 19-6: Mass Update Employee Step Rates screen

4 Use the information beginning on page 19-35 to fill in the fields on this screen.

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 Mass Update Employee Step Rates screen and returns you to the Infinium HR main menu:

Building submission request...

6 The system uses batch processing to process the *Mass Update Employee Step Rates* function and generate the Mass Update Employee Step Rates report. Access the Work with Submitted Jobs screen, the Work with All Spooled Files screen, or the Work with Printer Output screen to view the status of your job. You can view or print the report using options on these screens. A sample of the report is shown on the following page.

7 Examine the report that is generated. It lists the following information for each affected employee:

- Current pay grade
- Current step
- New personnel base rate
- Personnel base rate increase amount
- New payroll rate(s)

8 You can use the *Enter Personnel Actions, Display Salary Changes* or *Display Employee History* functions to view the salary change transactions the system generated when you ran the *Mass Update Employee Step Rates* function. The *Display Salary Changes* function presents salary change history information for many employees; the *Display Employee History* function presents an individual employee's salary change history.

There are many standard reports that include salary change history including *List PE Actions, List PE Action Details*, *List PE Actions by Levels* and *List PE Actions by Employee*. See the parts on Displaying Employee History and Printing Employee History for details.

A sample of the report the system produces when you run the *Mass Update Employee Step Rates* function is shown on the following page.

```
PRGSIG20   PRTSIG20                     M A S S   U P D A T E   E M P L O Y E E   S T E P   R A T E S             Page    1
 8/08/07   14:27:36
EMPLOYER ZUS   SAMPLE US COMPANY
AS OF DATE      6/01/2007
                                   PAY            NEW PE        BASE RATE           ------------- NEW PAYROLL -------------
EMPLOYEE NAME       EMPLOYEE#    GRADE  STEP     BASE RATE       INCREASE          RATE 1           RATE 2           RATE 3
------------------------------------------------------------------------------------------------------------------------------------
KC218,KC10121040           511    HOUR1   09         22.1500          6.2880          N/A              N/A              N/A
    * NO RATE INCREASES IDENTIFIED, RECORD NOT UPDATED
WINTER,SUMMER             3093    KAF     01  123456789.3400  *         .0000          N/A              N/A              N/A
    * UPDATES THAT WOULD RESULT IN A RATE DECREASE NOT APPLIED
LAWRENCE,KAMA             3097    KAF     03  361916982.4000       4160.0000          N/A              N/A              N/A
    * NO RATE INCREASES IDENTIFIED, RECORD NOT UPDATED
DMY,TEST                 11070    KAF     01  443210100.8700  *         .0000          N/A              N/A              N/A
    * UPDATES THAT WOULD RESULT IN A RATE DECREASE NOT APPLIED
TEST,MDY                 11071    KAF     01  877009809.6000   433799708.7300          N/A              N/A              N/A
DMY,QA                   11072    KAF     01  877009809.6000   433799708.7300          N/A              N/A              N/A
EMERGENCY,ERNIE          11073    KAF     01  877009809.6000   433799708.7300          N/A              N/A              N/A
ENGLISH,SAM          000005613    KAF     01   16865573.2615    16865533.2615          N/A              N/A              N/A
------------------------------------------------------------------------------------------------------------------------------------

 EMPLOYER ZUS        TOTAL CHANGED EMPLOYEES:          6             TOTAL BASE RATE INCREASE:  318337059.45
 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
                                                         ***** E N D  O F  R E P O R T *****
```

Appendix A Hiring Employees Using the *Update Employee Data* Function in Infinium HR

A

This appendix provides information about an alternate way to update employee information.

The appendix consists of the following topics:

Overview

In this appendix you learn how to hire employees using the *Update Employee Data* function in Infinium HR. You use this alternate method of hiring employees if you have not defined position controls in Infinium HR. The recommended method for hiring employees is the *Enter New Hire* function; however, you must set up position controls to use this method. You can use the *Update Employee Data* function with or without position controls to hire new employees into U.S. and Canadian employers.

You can use the *Update Employee Data* function in Personnel or Infinium PY to hire new employees. The system presents different screens and creates different records for new employees when you use the *Update Employee Data* function in Infinium PY rather than Infinium HR.

When you use the *Update Employee Data* method in Infinium HR to hire employees, you establish a basic data record and a personnel data record for each employee. You can also create a Hire Transaction record for each employee if you assign employees to a position on the last screen of the function.

When you use the *Update Employee Data* method in Infinium PY to hire employees, you establish a basic data record, a payroll data record, income authorization records and deduction authorization records for each employee. However, you cannot create a hire transaction record for new employees when you use the *Update Employee Data* method in Infinium PY.

The table below summarizes the differences between using the *Update Employee Data* function to hire employees in Infinium HR compared to Infinium PY.

New Employee Records Established Using the *Update Employee Data* Function	**Infinium HR**	**Infinium PY**
Basic Data	Yes	Yes
Personnel Data	Yes	No
Hire Transaction	Yes	No
Payroll Data	No	Yes
Income Data	No	Yes
Deduction Data	No	Yes

See “Entering New Hires Overview” chapter for a brief description of the employee records listed in the preceding table.

Hiring a New Employee

When you use the *Update Employee Data* function to hire a new employee, the system presents you with two prompt screens followed by nine screens consisting of the records listed in the table below. The first five screens constitute the employee basic data record. The next three screens build the employee's personnel data record. The last screen creates a hire transaction for the new employee.

Screen Number	Screen Description	The System Displays This Page Number:
1	Update Employee Basic Data - Personal Information	Screen 1 of 5
2	Update Employee Basic Data - Job Related Information	Screen 2 of 5
3	Update Employee Basic Data - Contact Information and Miscellaneous Information	Screen 3 of 5
4	Update Employee Basic Data - Compensation Information	Screen 4 of 5
5	Update Employee Basic Data - Break in Service Information	Screen 5 of 5
6	Update Employee Personnel Data	Screen 1 of 3
7	Update Employee Personnel Data	Screen 2 of 3
8	Update Employee Personnel Data	Screen 3 of 3
9	Hire Transaction	

You must skip the last screen, Hire Transaction, if you have not established position controls in Infinium HR.

Using Positions

If you define positions in Infinium HR and type **1** in the *Positions Used?* field on the employer control, the system does not allow you to enter information manually into most of the fields listed in the following table. The system fills in these fields automatically using information from the employee's assigned job and position. You assign the employee to a position on the last screen of the *Update Employee Data* function; therefore these fields are blank during the new hire process. The system automatically updates them after you exit from the hire transaction screen.

Some of the fields listed below are mandatory entries on the job and position controls; others are optional. The optional fields are marked with an asterisk. The system defaults information into the employee basic data record only if you fill the fields in on the job and position controls.

Employee Basic Data Fields Updated by the Position and Job Control	New Hire Screen Number
Levels *Location*	1
Position *Position Title* *Job Code* *EEO Category* *EEO-4 Function** *Union** *Shift** *PE Benefit Group** *Next Review** *Next Review Date**	2
*Security Group** *Labor Category** *Workers Comp**	3
*Pay Grade** *Step** *Salary Range* *Salary Quartile* *Comp Ratio*	4

Follow these steps to hire a new employee using the *Update Employee Data* function in Infinium HR:

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 Employee Update prompt screen.

Employee Update Prompt Screen

4 Use the following information to fill in the fields on this screen:

You must specify the employer into which you are hiring the new employee.

Employer

Type the code that represents the employer into which you are hiring the new employee. Press F4 to display a list of valid employers.

Employee

Leave this field blank.

5 Press F6. The system displays the New Employee prompt screen.

New Employee Prompt Screen

The New Employee prompt screen provides fields for specifying an applicant name, an employee and pay type, and up to four organizational levels. If you specify an applicant at this screen, the system also displays name, tax ID, and address information so that you can verify that this is the correct application before continuing. You cannot edit this additional applicant information here.

1 Use the following information to fill in the fields on this screen:

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 a value in the *Pay Type* field.

Applicant Name

If you use the Infinium HR *Applicant Administration* module, you can specify the applicant to be hired by typing the applicant's name or pressing F4 to display a list of applicants and selecting the appropriate applicant from the list.

At the list of applicants, unhired applicants are highlighted. You may need to page through the list, or type some or all of the applicant's last name in the *Locate* field at the top of the screen and press Enter to find the applicant.

To select the applicant, type any character in the *Opt* field and press Enter to return to the New Employee prompt screen with the applicant information displayed.

You can update any information supplied in the basic data record from the applicant record during later steps in the new hire process.

Employee

If you manually assign numbers to new employees, type the number in this field. If you specified on the employer control that you use the employee's tax identification number (Social Security Number in the U.S. or Social Insurance Number in Canada) as the employee number, type the employee's tax identification number in this field. Leave this field blank if you use system-assigned numbers.

Pay Type

If you use Infinium PY, type a value that indicates how the new employee's payroll rate will be stated for payroll cycle processing purposes. If you do not use Infinium PY, type a value that indicates the employee's pay status for personnel administrative purposes.

Valid values are:

H	Hourly: The new employee's payroll rate is stated on an hourly basis.
S	Salaried: The new employee's payroll rate is stated as a flat amount per pay period. This employee is not eligible for overtime pay.
N	Non-Exempt: The new employee's payroll rate is stated as a flat amount per pay period. This employee is eligible for overtime pay.

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

Levels

If you do not use position controls, type the code that represents each organizational level to which the new employee is assigned. Press F4 to display valid level codes. You can define up to four levels within an employer.

The system uses the *Level Description* fields from the employer control to display the level names at the bottom of this screen.

If you use position controls, leave these fields blank. The system uses the levels associated with the employee's hiring position to fill in the employee level fields at the end of the hiring process.

2 Press Enter. The system displays Update Employee Basic Data screen 1 (Personal Information).

Update Employee Basic Data Screen 1 (Personal Information)

1 Use the following information to fill in the fields on this screen:

If you selected the new employee's applicant data record on the New Employee prompt screen, the system fills in many of the fields on this screen with default values. Since almost all of the fields in the applicant data record are optional, the system may fill all, some or few of the fields on this screen. The only fields that cannot automatically display default values are *Common Name*, *Date of Hire* and *Adjusted D.O.H.* fields. Use the following information to update any of the default values.

To complete the fields on this screen without using the *Applicant Administration* function, type information in the fields described below.

You must type information in the *Last Name, First Name, Address, City/Town, State/Province, Date of Birth, Tax ID, Date of Hire* and *Sex* fields.

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

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

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 Initial* 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.

First Name

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

Middle Initial

Type the new employee's middle initial.

Birth Name

If applicable, type the employee's maiden name or name at birth. This is an optional 18-character free-form field.

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. This is an optional 20-character free-form field. If you leave this field blank during the new hire process, the system later fills it with the same information that you type in the *First Name* field. You can locate the employee using the *Common Name* field; see the "Displaying Employee Information" chapter in this guide for details.

Address

Type the employee's street address. This is a required 30-character free-form field.

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)

If applicable, type second line of the employee's street address. This is an optional 30-character free-form field.

City/Town

Type the name of the city in which the employee resides. This is a required 30-character field.

State/Province

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

Postal Code

Type the postal code or ZIP code of the employee.

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

Country

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

County

Type the code value that represents the county in which the employee resides. You define code values for this field using code type **CNT**.

Home Tel No

Type the employee's home telephone number. 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

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 record. Refer to the *Infinium HR Guide to Controls* for additional information.

Tax ID

Type the Social Security Number or Social Insurance Number of the employee. You do not need to type separator characters (hyphens) if you defined a default country of USA or Canada on the payroll employer control record; the system automatically enters the hyphens 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

Type the employee’s date of hire.

Sex

This field identifies the gender of this employee. Valid values are:

M	Male
F	Female

Adjusted D.O.H.

You 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. You normally leave this field blank when you are hiring a new employee.

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 Guide to Setup and Processing for Benefits Administration* for details about employee benefits administration.

Levels 1, 2, 3, 4

Levels represent the employer’s organizational structure and are hierarchical. For example, each level 2 code represents a sub-category of the level 1 with which it is associated. You can define up to four levels for each employer. The field descriptions that display on this screen default from the employer control record. They can be different for each employer that you define on your system. See the *Infinium HR Guide to Controls* for details.

If you entered values in these fields on the prompt screen for this function, the system displays the codes representing the level(s) to which the employee is assigned. Level information can default from the position to which the employee is assigned if you enter the position on the Hire Transaction screen during the new hire process. Each employee must be assigned to at least a level 1 value; he or she can also be assigned to levels 2, 3 and 4 as appropriate.

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. The system uses the levels associated with the employee’s hiring position to automatically fill in the *Level* fields in his or her basic data record.

Location

If you do not use position controls, type the code representing the work location to which the employee is assigned. You define code values for this field using code type **LOC**. This value can default from the employer control.

If you use positions, the Location code defaults from the position to which the new employee is assigned. 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.

2 Press Enter to advance to the next screen. The system displays Update Employee Basic Data screen 2 (Job and Performance Information).

Update Employee Basic Data Screen 2 (Job and Performance Information)

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

If you use positions, the system supplies default information from the applicable position and job controls in many of the fields on this screen, some of them after you have completed the new employee entry procedure. See the table on Page A-5 and the field descriptions that follow for details.

You must type information in the *Status* and *Ethnic ID* fields.

Job Related Information

Position

If you use position control, after you complete the new hire process the system displays the code representing the hiring position to which the employee was assigned in this field. You cannot manually update this field.

If you do not use positions, type the employee’s position title in this field. This is a 30-character free-form field.

Position Title

If you use positions, the information in this field defaults from the employee’s assigned position after you complete the new hire process. However you can override the default position title manually if necessary.

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 on-line 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” chapter 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

If you do not use positions, type the code that represents the job to which the new employee is assigned in this field. Press F4 to display a list of valid job codes.

If you use positions, after you complete the hire process the system defaults the code representing the job associated with the new employee’s hiring position into this field.

Seniority Date (1st line)

The system automatically defaults the employee’s hire date into this field.

Job Code 2

Type 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)

Type the second seniority date associated with an employee. This field is for informational purposes only.

Job Code 3

Type 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)

Type the third seniority date associated with an employee. This field is for informational purposes only.

EEO Category

If you do not use positions, type the code value representing the Equal Employment Opportunity category appropriate for this employee. Press F4 to display a list of valid values. You define code values for this field using code type **EEO**.

If you use positions, when you complete the hiring process the system uses information from the employee's hiring job to fill a value in this field. You cannot type in this field.

Status

Type the code value that represents the employee's current employment status. You define code values for this field using code type **STS**.

Previous Status

For current employees, the system uses this field to display 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

For current employees, 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.

Ethnic ID

Type the code value that represents the ethnic category appropriate for this employee. You define code values for this field using code type **ETH**.

EEO-4 Function

If you do not use positions and are a U.S. public sector employer, type the code assigned to this employee for EEO-4 State and Local Data reporting.

If you use positions and are a U.S. public sector employer, 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?

If you are a U.S. public sector employer, type 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 you do not use positions, type the code value representing the union of which the employee is a member, if applicable.

If you use positions, this code value defaults from the position control to which the employee is assigned. You cannot type in this field.

Union ID

If the employee is a union member, 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 when the employee became eligible to join the union or the date when he or she officially became a union member.

Shift

If you use shift processing, type the code value representing the default shift for this employee. Infinium PY uses this code during pay cycle processing to calculate shift or other premiums for the employee. This code can default from the employee’s level or position assignment. Press F4 to display a list of valid code values.

PE Benefit Group

If you do not use position controls or do not store the PE benefit group name on the position control, type 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 *Benefits Administration* function in Infinium HR. See the *Infinium HR Guide to Setup and Processing for Benefits Administration* for more information.

If you use position controls, 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 Benefits Administration.

Performance Information

This section of screen 2 of the employee basic data record displays information about the employee’s most recent and next scheduled performance review.

Next Review

If you do not use positions, type the code value that represents the type of performance review the new employee will receive. You define code values for this field using code type **RTP**. Press F4 to display a list of valid values.

If you use positions, this code can default from the *Next Review* field associated with the employee’s initial job assignment after you complete the hire transaction. You define code values for this field using code type **RTP**. Press F4 to display a list of valid values.

Next Review Date

Type the date on which the employee is scheduled to receive his or her performance review.

If you use positions, the system can fill this date automatically based on the *Next Review Days* field associated with the employee’s initial job assignment after you complete the hire transaction.

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.

Last Rating

For current employees, the system displays the code value representing the employee’s most recent performance evaluation rating in this field.

Last Rating Score

For current employees, the system displays the numeric score representing the employee’s performance evaluation rating.

Training Group

If you use Infinium TR, type the code that represents 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 *Infinium TR Guide to Setup and Processing* for more information. Press F4 to display a list of valid codes.

If you use positions, this code can default from the employee's position assignment.

2 Press Enter to advance to the next screen. The system displays Update Employee Basic Data screen 3 (Contact and Miscellaneous Data).

Update Employee Basic Data Screen 3 (Contact and Miscellaneous Data)

1 Use the following information to fill in the fields on Update Employee Basic Data screen 3 (Contact and Miscellaneous Data).

There are no required fields on this screen.

The system automatically fills in the *Workers Comp, Security Group* and *Labor Category* fields after you complete the hiring process if you define job and position controls and fill in the corresponding fields on those controls.

Contact Information

You can use the following fields in the Contact Information portion of this screen for information about how to reach this employee by telephone, e-mail or the Web.

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.

Miscellaneous Information

The bottom portion of screen 3 of the employee basic data record contains thirteen optional fields. Values for three of these fields, *Security Group, Workers Comp* and *Labor Category*, can default from the employee's hiring job and position after you exit from the last screen of the hire process.

Class

Type the code value representing the class to which the new employee is assigned. You define values for this field using code type **CLA**. Since the system does not use this field for any processing functions, you can use it to satisfy your own business and reporting requirements.

Hire Source

Type the code value that represents the recruitment source of this employee. You define code values for this field using code type **HIR**. If you use Applicant Administration, the value in this field can default from the *Appl. Source* field in the employee's Applicant Record.

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, type the code value that represents the security group to which the employee is assigned. This is an optional field. Press F4 to display a list of valid values. You define code values for this field using code type **SEC**.

If you use positions, this value can default from the job associated with the employee's hiring position after you complete the new hire process.

Your system security administrator can utilize an Infinium HR 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

If you do not use positions, type the code value that represents the labor category to which this employee is assigned. You define code values for this field using code type **LAB**.

If you use positions, this code value can default from the position control to which the employee is assigned after you complete the new hire process.

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.

2 Press Enter to advance to the next screen of the basic data record. The system displays Update Employee Basic Data screen 4 (Compensation Information).

Update Employee Basic Data Screen 4 (Compensation Information)

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

Eight of the fields in the upper portion of this screen, starting with the *Pay Grade* field, 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 his or her pay grade.

When you hire employees using the *Update Employee Data* function, all but one of these fields are low-lighted and you cannot type information into them. See the parts in this guide 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.

Eight of the fields in the lower portion of the screen, starting with the *Last Increase* field, apply to only current employees.

You must type information in the following fields:

- *Regular Hours*
- *Scheduled Pay Pds*
- *Base Rate*
- *Base Frequency*
- *Pay Type*
- *Pay Frequency*

Your system security 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 after you hire a new employee.

Regular Hours

Type 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 if 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

Type 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 if 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

Type the personnel 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 if 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 Benefits Administration 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

Type 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 the value that you entered in the *Pay Type* field on the prompt screen for this function. This field indicates the way that 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.

If you use positions, the system updates the value in this field using the *Pay Type* field on the job control to which the employee is assigned after you complete the new hire process. 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 in Infinium PY produce the correct results.

Pay Frequency

Type a value that indicates 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:

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 Grade

If you do not use positions, type the code that indicates 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 hire function. You can override the pay grade code during the new hire transaction if necessary. See the parts in this guide 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 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. All of these fields are low-lighted when you hire an employee using the *Update Employee Data* function; you cannot type information in them. If you assign the new employee to a step-in-grade job, the system automatically updates these fields when you complete the hire transaction.

Pay Grade Date

For current employees, the system displays the date when 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.

Step

For current employees, the system displays the step within the specified pay grade to which the employee is currently assigned. You use the *Mass Update Employee Steps* function to automatically move the employee from step to step within his or her assigned pay grade based on criteria that you specify on the associated pay grade control record.

Step Date

For current employees, the system displays the date when the employee was assigned to his or her current step. You cannot type information into this field. The *Mass Update Employee Steps* function automatically moves the employee from step to step within his or her assigned pay grade and updates this date based on criteria that you specify on the associated pay grade control record.

Next Step

For current employees, the system displays the step to which the employee is scheduled to advance when he or she 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 his or her next step.

Next Step Date

If the employee's movement to his or her next step is based entirely or in part on length of service, the system displays the date that the employee is scheduled to advance to his or her next step. The system uses this date during the *Mass Update Employee Steps* function to move the employee to his or her next step.

Freeze Step?

For current employees, 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.

Valid values are:

0	The employee can advance to his or her next step.
1	The employee is "frozen" and cannot advance to his or her next step.

Step Override?

For current employees, 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 automatically defaults **1** into this field. After the *Mass Update Employee Steps* function moves the employee to the specified next step, the system automatically defaults **0** in the *Step Override?* field.

Last Increase

For current employees, the system displays the effective date of the most recent salary change transaction entered for this employee in the *Enter Personnel Actions* function.

Increase Reason

For current employees, 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 %

For current employees, 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 new employee is scheduled for a salary change. The system does not update or maintain this field at this time.

Last Increase Amt

For current employees, 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

For current employees, 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

If you do not use positions, type the code that represents the salary range to which the employee is assigned.

If you use positions, you cannot type in this field. After you complete the hire process, the system fills in the salary range code that corresponds to the job control associated with the employee's hiring position.

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.

If you use positions, when you hire an employee you assign him or her to a position; each position is associated with a job and each job 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 after you complete the hire transaction.

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 his or her 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%. The system automatically updates this field after you complete the hire transaction.

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 “Defining Salary Ranges” chapter in the *Infinium HR Guide to Controls* for details.

4 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).

Update Employee Basic Data Screen 5 (Break in Service Information, Retirement Information, Time Clock Information)

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

You do not enter information into fields in the top two-thirds of this screen for new employees. You use the *Enter Personnel Actions* function to maintain these fields for current employees. 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.

For new and current employees, the four fields listed below are the only fields that you should maintain directly in the basic data record. All of these fields are optional:

- *Retirement Plan?*
- *Retirement Code*
- *Eligibility Date*
- *Retirement Age*

These fields do not interface with the *Benefits Administration* function in Infinium HR.

Break in Service Information: Status Change Data

For current employees, you use the status change transaction in the *Enter Personnel Actions* function to update the following 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.

FMLA Start Year

This is the year the employee started the first FMLA leave. The system uses this date as the starting date for the employee's annual FMLA eligibility for FMLA leave.

FMLA Leave

This field indicates whether the employee is currently on an FMLA leave.

Leave Date

The system displays the date when the employee was laid off or went on a leave of absence.

Date of Return

The system displays the date when the employee is expected to return from his or her leave of absence or layoff.

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

For current employees, 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 that the employee ended his employment with the specified employer.

Last Day Worked

The system displays the date that the employee last worked for 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**.

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

For former employees, 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 that the employee was rehired by this employer.

Retirement Information

You maintain the following four fields manually. These fields are for your own reporting and analysis. They are not used by the *Benefits Administration* function within Infinium HR nor are they used by Infinium PY for W-2 or T4 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 will participate in or the type of retirement plan distribution that the employee will receive. You define code values for this field using code type **BEN**.

Eligibility Date

Type the date that the employee is eligible to participate in the company's retirement plan or the date he or she is eligible to retire.

Retirement Age

Type the retirement age applicable to this employee. 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 Fl. 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 Fl. 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 Fl. 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 Fl. Clock# Used* field on the entity control is **S**, this is the employee's clock number.

2 Press Enter. The system displays Update Employee Personnel Data screen 1.

Update Employee Personnel Data Screen 1

Use the following information to complete the fields on this screen.

If you selected the new employee's applicant data record on the New Employee prompt screen, the system automatically defaults information into some of the fields in the next three screens. You can update some of these fields and fill in additional fields during the new hire process.

The information on the third screen of the employee's personnel data is automatically maintained through the *Enter Personnel Actions* function. You use Personnel Actions to create historical information for employees.

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 enter values in the *Marital Status* and *Ex-Felon* fields. 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. Press F4 to display a list of valid values. You define code values for this field using code type **SEA**.

If you use positions, this code value can default from the employee's position assignment.

Restrictions

Type the code value that indicates whether the employee has any physical limitations on the type of work he or she 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 that 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 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 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 when the employee last donated his or her 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

For current employees, 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. This value can default from the employee's applicant data record.

Valid values are:

M	Married
S	Single
D	Divorced
W	Widowed

This field does not affect tax withholding computations for U.S. employees. You enter the federal, state and local tax claiming status for U.S. employees in the *Update Payroll Data (USA)* function.

Dependents

Type the number of dependents for this employee. This information can default from the employee's applicant data record.

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 new hire process.

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 his or her 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 field that does not require pre-defined values.

Passport Exp Date

Type the date when 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 advance to the next screen of the hire process. The system displays Update Employee Personnel Data screen 2.

Update Employee Personnel Data Screen 2

1 Use the following information to fill in the fields on Update Employee Personnel Data screen 2:

You type emergency contact information for the employee on the top half of this screen.

You use the bottom half of this screen to type military information for the employee, including his or her veteran status, military branch, occupation and discharge date.

None of the fields on this screen are required.

Emergency Information

You use the following seven fields to track emergency contact information for the employee. None of these fields are required by the system.

Contact Name

Type the name of the person to be contacted if the employee is involved in an emergency situation.

Address

Type the address of the employee's emergency contact person.

City/State

Type the city and state or province in which the employee's emergency contact person is located.

Physician

Type the name of the employee's doctor.

Primary Tel #

Type the first telephone number that you should use to reach the employee's emergency contact person.

Physician's Tel #

Type the physician's telephone number.

Relationship

Type the code value that indicates the relationship of the employee's emergency contact person to the employee. Press F4 to display a list of valid values. You define code values for this field using code type **REL**.

Military Information

You use the following fields to track military information about the employee, if applicable. None of these fields is required by the system. The system uses information from some of these fields in the List Veterans report and the List VETS-4212 report; these reports are included in the *Administrative Reporting* function.

Veterans Code

Type the code value that indicates the employee's current military status. This code value can default from the employee's applicant data record. You define code values for this field using code type **MIL**.

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

Type the date when the employee was discharged from the military service. This information can default from the employee's applicant data record.

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 that 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**.

Health and Disability Information

Disability?

Specify the term of this employee's 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.

2 Press Enter to advance to the next screen in the hire process. The system displays Update Employee Personnel Data screen 3.

Update Employee Personnel Data Screen 3

1 Use the following information to interpret the fields on this screen.

You do not enter information into most of these fields for a new employee. For current employees, almost all of the information on this screen is filled in by the system automatically when you use the *Enter Personnel Actions* function. You use this screen to view the employee’s information prior to his or her most recent personal change, transfer, promotion, demotion or rehire transaction.

Name

For current employees, 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.

Address

For current employees, 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)

For current employees, 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

For current employees, 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

For current employees, type the length of time the employee lived at his or her 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 when the employee was assigned to his or her current job in this field. For new employees, the system automatically updates this field with the employee's hire date. 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 associated with a different job, the system updates this field.

Job Code

For current employees, 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

For current employees, 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

For current employees, the system displays the date when the employee moved into his or her 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 levels associated with the old position are different from the levels associated with the new position.

Level 1

In Figure A-12, the system displays **Area** to describe level 1 for the sample employer **ZUS**. You define level descriptions on the employer control record; therefore, they can vary for each employer.

For current employees, 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

In Figure A-12, the system displays **Division** to describe level 2 for the sample employer **ZUS**. You define level descriptions on the employer control record, therefore they can vary for each employer.

For current employees, 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

In Figure A-12, the system displays **Department** to describe level 3 for the sample employer **ZUS**. You define level descriptions on the employer control record, therefore they can vary for each employer.

For current employees, 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

In Figure A-12, the system displays **Cost Center** to describe level 4 for the sample employer **ZUS**. You define level descriptions on the employer control record; therefore, they can vary for each employer.

For current employees, 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

For current employees, 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.

2. When you press Enter, the system exits from the employee’s personnel data record and displays the Personnel Actions Update Hire Transaction screen.

Personnel Actions Update Hire Transaction Screen

1. Use the following information to fill in the fields on this screen.

   If you have not defined positions, press F3 to exit from this screen. You cannot create a hire transaction without assigning the employee to a position. The hire transaction is stored in the employee’s on-line history and provides a snapshot of the employee’s hiring information.

   The *HI Effective Date, Status, HI Position, Base Frequency, Pay Type, Scheduled Pay Pds, Base Rate*, and *Regular Hours* fields are required. The system uses information you entered on preceding screens to fill in all of the required fields except the *HI Position* field. If necessary, you can update these fields on this screen. The system updates fields in the employee’s basic data and personnel data records with the changed information when you exit from the new hire function.

Using Positions

If you assign the new employee to a position on this screen, the system uses information from the position and job controls to update some or all of the following protected fields on this screen:

- *Levels*
- *Labor Category*
- *Workers Comp*
- *Salary Range*
- *Salary Quartile*
- *Job Code*
- *Union*
- *Location*

Depending on the fields you filled in on the job and position controls, the system uses information from them to also update the following fields in the employee’s basic data and personnel data records when you complete the hire transaction.

Field Name	Location
Date of Hire *Levels 1, 2, 3, 4* *Location*	Basic Data, Screen 1
Position *Position Title* *Job Code 1* *Seniority Date (first)* *EEO Category* *Status* *Status Chg Date* *Union* *Shift* *PE Benefit Group*	Basic Data, Screen 2
Workers Comp. *Labor Category*	Basic Data, Screen 3

Field Name	**Location**
Regular Hours *Scheduled Pay Pds* *Base Rate* *Base Frequency* *Pay Grade* *Pay Grade Date* *Step* *Step Date* *Next Step* *Next Step Date* *Salary Range* *Salary Quartile* *Comp Ratio*	Basic Data, Screen 4
Season	Personnel Data, Screen 1
Job Change Date	Personnel Data, Screen 3

HI Effective Date

The system displays the hire date that you entered for the employee on screen 1 of this function.

Status

The system displays the status code that you entered for the employee on screen 2 of this function.

HI Position

Type the code that identifies the employee's hiring position. Press F4 to display a list of valid position codes. When you select a position from the Positions Display, the system instantly updates the protected fields on this screen with information from the position control.

Base Frequency

The system displays the value that you entered for the employee on screen 4 of this function.

Pay Type

The system displays the value that you entered for the employee on the prompt screen for this function. If the *Pay Type* value on the employee's job control is different from the value that you entered on the prompt screen, the system updates the employee's *Pay Type* field with the value from his or her assigned job when you exit from the new hire function.

Scheduled Pay Pds

The system displays the value that you entered for the employee on screen 4 of this function.

Base Rate

The system displays the value that you entered for the employee on screen 4 of this function.

Regular Hours

The system displays the value that you entered for the employee on screen 4 of this function.

Shift Code

The system displays the value that you entered for the employee on screen 2 of this function. Leave this field blank if you want the system to fill in the Shift code value from the employee's position control.

Pay Grade

The system displays the value that you entered for the employee on screen 4 of this function. Leave this field blank if you want the system to fill in the pay grade code from the employee's job control.

Description

You can use this field to type any additional information about the hire transaction. This is an 18-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

Comment

You can use this field to type any additional information about the Hire transaction. This is a 75-character free-form field that does not require pre-defined values. You can use Infinium QY to print this information.

If you pressed F4 on the *HI Position* field and selected a position from the Position Display screen, the system instantly updates the protected fields on this screen when you return to the Hire screen. Depending on the information on the new employee's position and job controls, the system updates the *Levels, Labor Category, Worker's Comp, Salary Range, Salary Quartile, Job Code, Union* and *Location* fields.

2 Press Enter to store this transaction in the list on the bottom portion of this Personnel Actions Update Hire Transaction screen.

3 Press F3 to save the new employee's information and exit from this screen. You have completed the new hire process.

The system displays the Employee Update selection screen.

Employee Update Selection Screen

The Employee Update selection screen provides the following selection list of employee information types:

- Basic Data
- PTO Accrual Data
- Personnel Data
- Education Data – Formal
- Education Data – O.J.T.
- Property In Possession
- Dependent Data
- Automobile Data
- Employee Log
- Enter Hire Transaction
- User Defined Data

You can select the Basic Data and Personnel Data options on this screen to review or update the information that you entered for the new employee. See the parts in this guide entitled "Updating Employee Basic Data" and "Updating Employee Personnel Data" for details.

Set up Paid Time Off Accrual Information

To set up the employee's paid-time-off accrual information, 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" chapter in the *Infinium PY Guide to Management Functions*.

Notes