



Personnel Administration

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

By the end of this course participants will be able to:

- Discuss integration of Organizational Management and Personnel Administration (PA)
- Define PA key terms
- Define infotypes and subtypes
- Identify and review PA forms
- Perform personnel actions based on receipt of forms
- Execute PA reports



Personnel Administration Overview

Lesson 1

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Wrap Up

By the end of this lesson participants will be able to:

- Define the Enterprise Structure
- Identify the integration of Organizational Management and Personnel Administration
- Define the Personnel Structure
- Identify and define basic KHRIS Personnel Administration terms
- Explain the importance of dates
- Identify reasons associated with actions

The following key terms will be discussed in this lesson:

- Personnel Administration
- Organizational Management
- Enterprise Structure
- Employee Groups
- Employee Subgroups
- Payroll Area
- Organizational Plan
- Master Data
- Actions
- Infotypes
- Subtypes
- Dates in KHRIS
- Validity Periods
- Delimit

Concept of KHRIS Personnel Administration

There are two core modules used to maintain employee data:

- ***Personnel Administration (PA)***

- Stores employee master data in infotypes
- Integrates with Organizational Management module linking business structures to employees



- ***Organizational Management (OM)***

- Maintains organizational structure such as Cabinets and Departments
- Integrates with Personnel Administration module to complete HR Master Data



This course focuses on Personnel Administration

KHRIS contains three distinct areas of information:

- Organizational Structure
- Enterprise Structure
- Personnel Structure

These pieces of information create integration between Organizational Management and Personnel Administration when a holder is placed in a position.



How KHRIS Organizes Information

Display 0001 Organizational Assignment

Org Structure

Personnel No: 155307 Name: Carol McFarland

EE group: A 18A Personnel area: 0001 Executive Status: Active

EE subgroup: 02 ASC Salary 37.5 Pers. subarea: 1001 FT N-Exempt

Start: 05/02/2010 to 12/31/9999 Chng: 08/02/2010 CONVADM

Enterprise structure

CoCode: COMK Commonwealth of Kentucky

Pers. area: 0001 Executive Subarea: 1001 FT N-Exempt

Cost Ctr: 5372900000 Dept for Mh, Dev Dis Bus. Area: 1000 Commonwealth of Kentucky

Func. Area: []

Personnel structure

EE group: A 18A Payr. area: SM Semi-monthly

EE subgroup: 02 ASC Salary 37.5 Contract: []

Organizational plan

Percentage: 100.00

Position: 30031917 62110V000101 ALCOHOL & DRUG REI

Job key: 20001077 62110V000101 Alcohol & Drug Rehabil

Exempt: E

Org. Unit: 10003748 53729 Support Services Unit

Org. key: 00015372900000

Administrator

Time: []

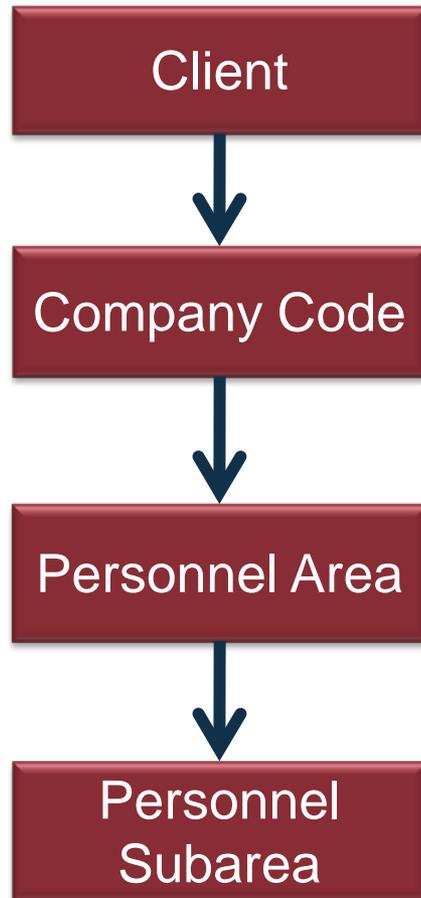
Enterprise structure

Personnel structure

Organizational structure

The Enterprise Structure

The ***enterprise structure*** represents an enterprise's hierarchy.



- The client is an independent legal and organizational unit of the system

- The company code is an independent company with its own accounting unit; a single company code was created in KHRIS called COMK – Commonwealth of Kentucky

- A personnel area is a unit in Personnel Administration. It represents a subdivision of the company code *Example: Executive or Judicial branches*

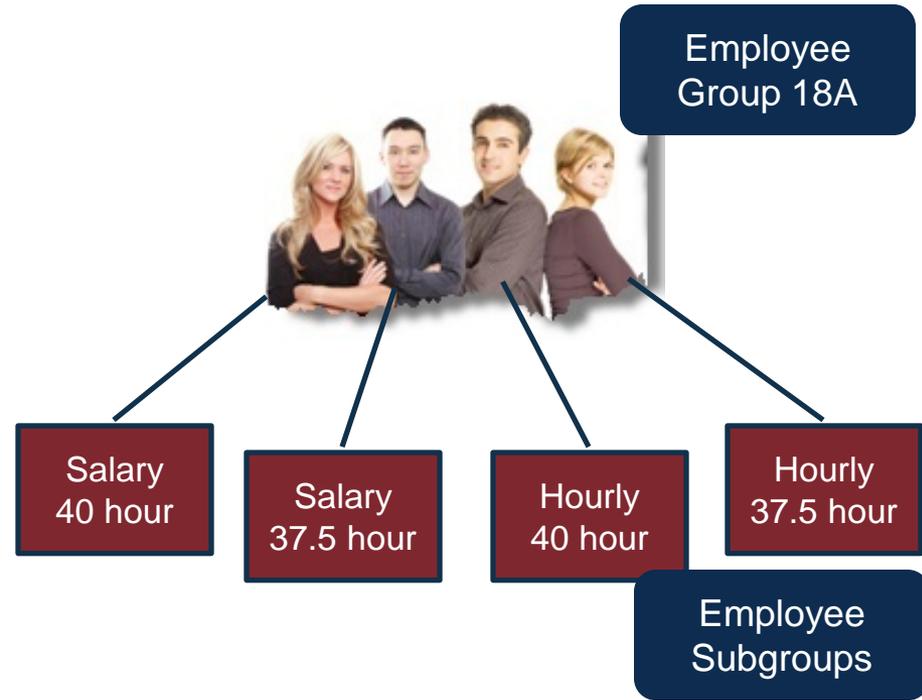
- A personnel subarea is a subdivision of a personnel area. In KHRIS, personnel subarea is based on work time. For example: *Full time, Part time, Interim, Benefits Only & Exempt/Non Exempt status*

Personnel Structure

Employee Groups separate or divide employees.

Employee Subgroups subdivide employee groups according to an employees status.

Payroll Area describes the pay frequency and payroll cycle for each employee.



Personnel structure		
EE group	A	18A
EE subgroup	02	ASC Salary 37.5
Payr.area	SM	Semi-monthly
Contract		

Organizational Structure

Organizational Plan defines the hierarchical relationship between organizational management objects including org units, positions and jobs.

Organizational plan		Administrator	
Percentage	<input type="text" value="100.00"/>	Time	<input type="text"/>
Position	<input type="text" value="30031917"/>		
		62110V000101	
		ALCOHOL & DRUG REI	
Job key	<input type="text" value="20001077"/>	62110V000101	
		Alcohol & Drug Rehabili	
Exempt	<input type="text" value="E"/>		
Org. Unit	<input type="text" value="10003748"/>	53729	
		Support Services Unit	
Org.key	<input type="text" value="00015372900000"/>		

HR Master Data

- Centrally stored employee information that is shared across modules within KHRIS
- Information that remains the same over a long period of time





The **life cycle** of an employee comprises many different events.

An **action** combines logically related information into one group.

Infotypes are used to group related data to form units of information.

KHRIS Personnel Records

Display HR Master Data

Personnel no. 55307

Name Carol McFarland Status Active

EE group A 18A Personnel area 0001 Executive

EE subgroup 02 ASC Salary 37.5 Pers. subarea 1001 FT N-Exempt

Basic personal data Payroll Benefits Time Taxes Planning Data

Infotype text	E
0000 Actions	✓
0001 Organizational Assignment	✓
0002 Personal Data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	✓
0019 Monitoring of Tasks	
0023 Other/Previous Employers	

Period

Period

From To

Today Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year

Choose

Direct selection

Infotype STy

Manual Personnel Records



Subtypes are an expansion of an infotype.

For example:

- Communication is the infotype
- E-mail is the subtype

The screenshot displays the 'Display HR Master Data' interface. At the top, it shows personnel information for 'Hailey Berry' with personnel number 5, EE group 'L External - BN', and EE subgroup '41 24 Non-Paid'. Below this, there are tabs for 'Basic personal data', 'Payroll', 'Benefits', and 'T'. A dropdown menu is open, showing a list of infotypes under 'Infotype text'. The '0105 Communication' infotype is selected and highlighted in yellow. To the right of this menu, a list of subtypes for infotype 0105 is displayed, with '0010 E-mail' selected and highlighted in yellow. The list of subtypes includes: 0001 System user name (SY-UNAME), 0010 E-mail, Z001 Business Partner Number, Z003 Document Code, Z004 Department Code, Z005 Document ID, Z006 Document Vendor Line #, Z007 User Security Agreement, and Z008 Check Distribution Code.

STyp	Name
0001	System user name (SY-UNAME)
0010	E-mail
Z001	Business Partner Number
Z003	Document Code
Z004	Department Code
Z005	Document ID
Z006	Document Vendor Line #
Z007	User Security Agreement
Z008	Check Distribution Code

- **0000 Actions** indicates the events that occurred on the employee's personnel record. For example:
 - Appointment
 - Position Number Change - Internal
 - Return from Leave w/out Pay
- **0001 Organizational Assignment** information defaults from the position assigned to the employee. Time, payroll, and benefits pull information from this infotype.
- **0002 Personal Data** contains information such as the social security number and date of birth. This information is important for tax reporting, payroll, and benefits.
- **0006 Addresses** houses the employee's home and work addresses. The employee's residence county and telephone numbers are also stored on the *permanent residence* subtype. The county code on the *work address* subtype is inherited from the position.

Infotype Definitions (cont.)

- **0008 Basic Pay** denotes salary or hourly wages. Adjustments involving an employee's pay would result from an action. This infotype may be changed only by users with authorized access.
- **0019 Monitoring of Tasks** is where task types are stored. This infotype houses information on when an employee is expected to return from leave, be off initial probation or promotional probation, etc.
- **0041 Date Specifications** holds the original hire date, current hire date, annual increment dates, status, and benefit dates are stored on this infotype. ACE and ERA payment dates will also be stored here. The Employee Status is stored on this infotype - example A Initial Probation.

Every action and IT in KHRIS must have a beginning (effective) and ending date.

- When we create or revise a record, we are required to enter an effective date
- KHRIS automatically assigns an end date of 12/31/9999, or “infinity”
- When we revise a record, the end date of the previous record will populate automatically based on the effective date of the new record



Validity Periods are the start and end dates that define the life span of an infotype.

Display 0002 Personal Data

Personnel No Name
Position Integration: default position
Status
Start To Changed on

Start Date

End Date

Display 0006 Addresses

Personnel No Name
Position Integration: default position
Status
Start to Changed on

Start Date

End Date

Delimit means to put an end date on a previous record. When the new record is created, KHRIS automatically delimits the previous record to one day prior to the new record's effective date.

- Preserves history
- End date becomes the date before the effective date of the newly created record

Overview 0007 Planned Working Time

Personnel No: 138491 Name: Gladys Berry

EE group: L External - BN Personnel area: 0004 Benefits Only Status: Active

EE subgroup: 41 24 Non-Paid Pers. subarea: 2001 Board of Ed.

Choose: 01/01/1800 12/31/9999

Start Date	End Date	WS rule	T	Empl.	MoHrs	Wk.hrs	Hrs/Da	WkD...	P	LI	AI
09/12/2010	12/31/9999	24/737.5	0	100.00	162.50	37.50	7.50	5.00			
05/02/2010	09/11/2010	24/7	1	100.00	172.33	40.00	8.00	5.00			

Before you can display employee data, you must identify the employee that you want to view.

Use one of the following methods:

1. Personnel number
2. =n.xxxx
3. =c..#####
4. Possible Entries

2. =n.xxxx

3. =c..#####

4. Possible Entries

1. Personnel #

The screenshot shows the 'Display HR Master Data' application window. The 'Personnel no.' field is highlighted in yellow. A search dropdown menu is open, showing options: 'Personnel Number (1)', 'Last name - First name', 'Personnel ID Number', 'Organizational assignment', 'Last name - First name', 'Personnel ID Number', 'Organizational assignment', 'Employee ID', and 'Free search'. The 'Personnel Number (1)' option is selected. The interface includes tabs for 'Personal data', 'Payroll', 'Benefits', 'Time', 'Taxes', and 'Planning Data'. A search sidebar on the left lists 'Person', 'Collective search help', 'Search Term', and 'Free search'. A search criteria section includes 'Text', 'Period', and 'From'/'To' fields. A list of organizational assignments is visible at the bottom left, including '0009 Bank Details', '0019 Monitoring of Tasks', and '0023 Other/Previous Emplo'.

Display Master Data (Transaction PA20), provides several options for viewing the infotypes.

The screenshot shows the SAP Display HR Master Data (Transaction PA20) interface. The window title is "Display HR Master Data". The menu bar includes "HR_master data", "Edit", "Goto", "Extras", "Utilities", "Settings", "System", and "Help". The toolbar contains various icons for navigation and actions. The main area is divided into several sections:

- Find by:** A search area with options for "Person", "Collective search help", "Search Term", and "Free search".
- Person:** A search field with a magnifying glass icon.
- Infotype List:** A list of infotypes with checkboxes and a search field. The list includes: "0000 Actions", "0001 Organizational Assignment", "0002 Personal Data", "0006 Addresses", "0007 Planned Working Time", "0008 Basic Pay", "0009 Bank Details", "0019 Monitoring of Tasks", and "0023 Other/Previous Employers".
- Period Selection:** A section for selecting the time period, with options: "Period", "Today", "All", "From curr.date", "Current Period", "Curr.week", "Current month", "Last week", "Last month", and "Current Year".
- Direct selection:** A section for direct selection, with fields for "Infotype" and "STy".

Callouts highlight specific features:

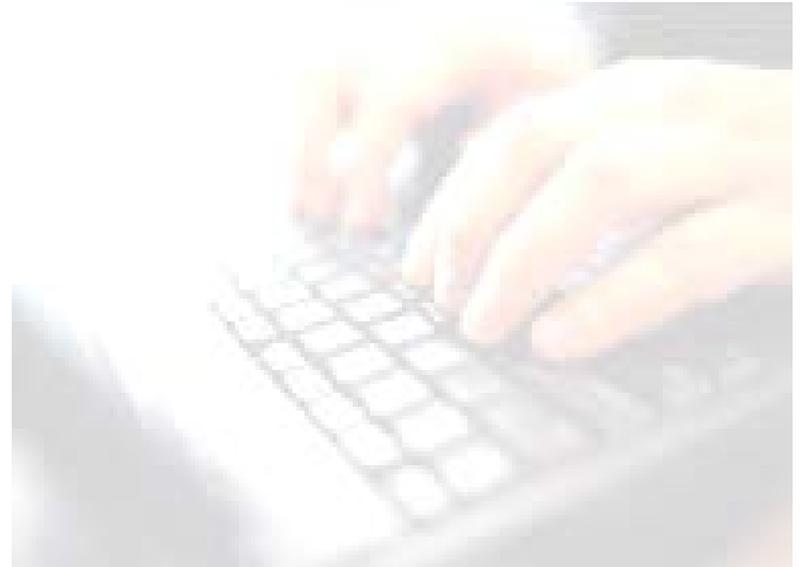
- Tabs:** A callout pointing to the tabbed interface at the top of the main area.
- All Tabs:** A callout pointing to the "All Tabs" button on the right side of the tabbed interface.
- Area to enter Infotype and Subtype number directly:** A callout pointing to the "Direct selection" section at the bottom.
- Period:** A callout pointing to the "Period" selection options on the right.

Exercise 1.1: Display Master Data

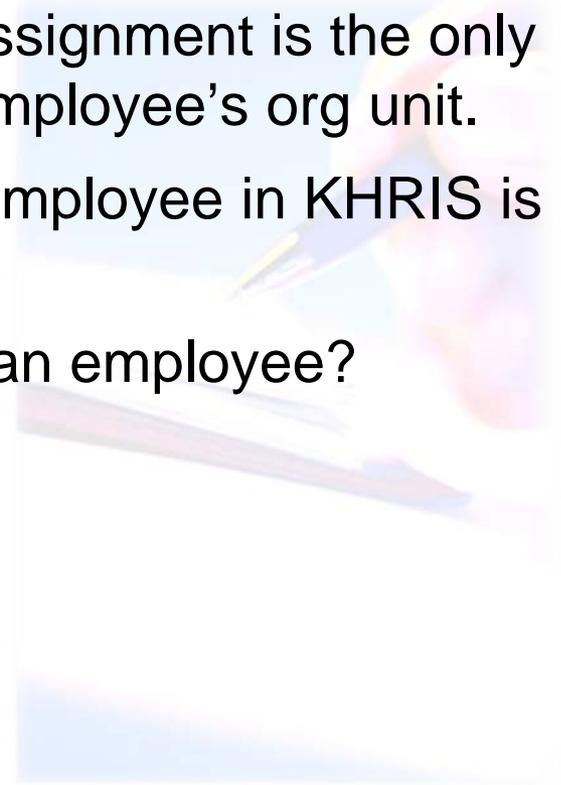
Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

View an employee's personnel file.



1. True or False? The two core modules used to maintain employee data are Organizational Management and Personnel Administration.
2. True or False? IT0001-Organizational Assignment is the only location in PA in which you can find an employee's org unit.
3. True or False? The only way to find an employee in KHRIS is by using the personnel number.
4. Which infotype identifies the life cycle of an employee?
 - a. IT0000 – Actions
 - b. IT0002 – Personnel Data
 - c. IT0041 – Date Specifications



In this lesson you learned to:

- Define the Enterprise Structure
- Identify the integration of Organizational Management and Personnel Administration
- Define the Personnel Structure
- Identify and define basic KHRIS Personnel Administration terms
- Explain the importance of dates
- Identify reasons associated with actions





Forms and Personnel Actions

Lesson 2

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Wrap Up

By the end of this lesson participants will be able to:

- Explain actions and how they are used
- Identify the Personnel Administration forms to complete actions
- Review the various personnel action forms
- Complete the steps to submit various personnel action forms
- Attach documents to personnel action forms

Personnel Action

- Action Type groups personnel actions according to business aspects
- Selection of an Action Type triggers the Reason for Action

Display 0000 Actions

Pers.No. 999999
 Name Doe , Jane
 EE group A 18A Personnel ar 0001 Executive
 EE subgroup 02 ASC Salary 37.5
 Start 07/01/2011 to 12/31/9999 Chng 07/01/2011 JMM9999

Personnel action

Action Type Appointment
 Reason for Action 01 Appointment

Action Type: B4 BN - End Leave W / Out Pay

Reason for Action

Z1	Appointment
Z2	Re-Hire
Z3	Reclassification
Z4	Reallocation
Z5	Grade Change
Z6	Range Change
Z7	Position Number Change-Ex
Z8	Position Number Change-Int
Z9	Change in Pay
ZA	Suspension

Status

Customer-specific

Employment

Special payment

Organizational assignn

Action Type: Z1
 Name of action type: Appointment

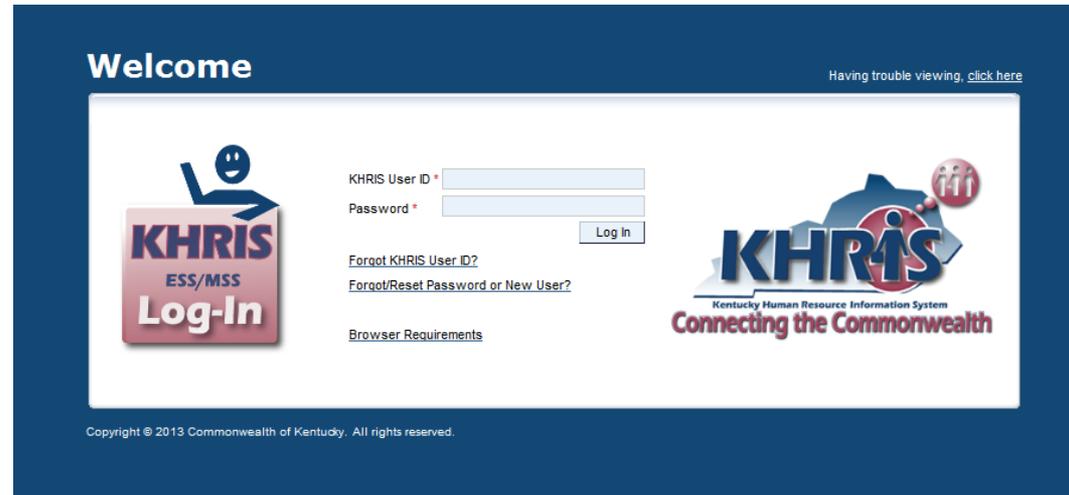
Ac...	Name of reason for action
01	Appointment
02	Appointment up to Midpoint
03	Interim
04	Interim up to midpoint
05	Prev Uncl w/no Prior Class-Min
06	Prev Uncl w/no Prior Class-Mid
98	Void - Appointment
99	Correct - Appointment

Personnel Actions are the steps you complete to manage and maintain employee records.

- Change in Pay
- Leave Without Pay
- Leave With Pay
- Miscellaneous Actions
- Position Number Change – External
- Position Number Change – Internal
- Retirement
- Return from Leave W/Pay
- Return from Leave W/O Pay
- Separation
- Suspension
- Void or Correction
- Appointment
- Dual Appointment
- Rehire
- Return from Suspension

The HCMPF forms are accessed through the KHRIS Self-Service Center.

- Web-based portal (khris.ky.gov)
- Access based on security role
- Our user ID is our alphanumeric employee ID (ABC1234)
- An ESS eLearning course is available for additional guidance



The screenshot shows the KHRIS Self-Service Center login page. At the top left, it says "Welcome". At the top right, there is a link: "Having trouble viewing, [click here](#)". The main content area is white and contains a login form. On the left side of the form is a logo for "KHRIS ESS/MSS Log-In" featuring a person icon. On the right side is a larger logo for "KHRIS Kentucky Human Resource Information System Connecting the Commonwealth". The login form includes two input fields: "KHRIS User ID *" and "Password *". Below the password field is a "Log In" button. There are also links for "Forgot KHRIS User ID?", "Forgot/Reset Password or New User?", and "Browser Requirements". At the bottom of the page, there is a copyright notice: "Copyright © 2013 Commonwealth of Kentucky. All rights reserved."

User Security Agreement

Employees will be required to read and sign a User Security Agreement annually so that an updated form is on record.

User Security Agreement

ENTER YOUR FULL NAME: *

I AGREE Reject

User Security Agreement for Access to Confidential Data Maintained by the Personnel Cabinet

I understand security measures have been established to provide access to the Kentucky Human Resource Information System (KHRIS). I understand these security measures may also provide inquiry and/or update capabilities to all systems maintained by the Personnel Cabinet, to include, but not limited to, KHRIS, KHRIS' Employee Self Service (ESS) and/or KHRIS' Manager Self Service (MSS), the Career Opportunities System (COS), Image Connect, and/or CICS.

I acknowledge and agree to the following:

- I understand in order to obtain access to Personnel Cabinet systems, I have been given a User ID and password. I am solely responsible for all information obtained through this computer system access using only my ID and password. I am obligated to keep all Access Codes, including my User ID, password, security questions, etc., confidential to prevent unauthorized access to my accounts and to prevent unauthorized use of these systems.
- I will not allow any person to use my ID and password to logon to any network or system of the Personnel Cabinet. I am responsible for any use or abuse of KHRIS information and any other system information with these accounts, since no other person will have authorized access through my account.
- I further understand that the Personnel Cabinet may cancel my access at any time without notice if security has been or may be compromised.
- I understand that KHRIS and any other Personnel Cabinet system data (processed or stored under local directories) shall not be used for any purpose other than official Commonwealth agency business. I shall not disclose in any manner to any entity or individual who does not have a legitimate need to know without the prior, written consent of the Secretary of the Personnel Cabinet.
- I understand that some information that I access as an Authorized Agency User may be considered not only confidential but also Protected Health Information (PHI) subject to the Health Insurance Portability and Accountability Act (HIPAA) of 1996. Additionally, I understand some levels of access to KHRIS require Personnel Cabinet sponsored HIPAA training before access is granted. This training shall be renewed periodically.
- Any User that improperly discloses, intentionally misuses or inappropriately transfers any confidential information, may be subject to disciplinary action up to and including dismissal, pursuant to KRS 18A, 101 KAR 1:345, 101 KAR 3:050, or other applicable state and federal law. Any User who violates the terms of this Agreement may also be exposed to additional civil and/or criminal charges.

I understand I shall notify my Agency Security Contact of any actual or suspected data security breach as soon as possible. The Agency Security Contact is responsible for immediately notifying the Personnel Cabinet. I further understand and agree nothing contained in this Agreement shall be construed as granting any property rights, by license or otherwise, to any confidential information.

By clicking "I AGREE" below, I acknowledge it is my responsibility to comply with the terms of this Agreement, which I have read and accepted these conditions as stated herein and within KHRIS documentation. I further acknowledge this action serves as my signature indicating I agree to maintain the confidentiality of all information obtained at all times, including if and when I am no longer an employee of the Commonwealth.

Accessing Forms in Self-Service Center

The tabs you see in the Self-Service Center will depend on your security access.

The screenshot shows the KHRIS Self-Service Center interface. At the top, there is a header with the Kentucky Personnel Cabinet logo and the text "Kentucky Personnel Cabinet Serving the People Who Serve the People". The user is logged in as "Welcome BPP0038," with "Help" and "Log Off" links. A navigation bar contains several tabs: "Training Liaison Administrators", "Instructors", "Employee Self-Service" (highlighted), "My Benefits", "Manager Self-Service", "Insurance Coordinator NCP2", "Insurance Coordinator NCP1", and "HR Generalist". Below the navigation bar, there is a "Welcome" message and a "Welcome to the KHRIS Employee Self-Service Center" heading. A "Detailed Navigation" sidebar on the left lists: "Welcome" (highlighted), "Benefits Information", "Payment Information", "Personal Information", "Working Time", and "Who's Who". The main content area contains a welcome message and a list of options available to the user:

- **Benefits Information:** View your current benefits selections, identify external organizations (such as charities) that you can then designate as your beneficiaries, complete annual enrollment during allowed periods.
- **Payment Information:** Review various salary/compensation statements, estimate your net pay using different withholdings and deductions, Change your W-4 tax withholdings.
- **Personal Information:** Maintain your address, family member and dependent information, emergency contacts and bank information.
- **Working Time:** Check your leave balances, request leave and overtime, review your time statement.

* Certain KHRIS services and/or information contained in the Employee Self-Service Center are only applicable to full-time employees. Please check with your Human Resource Office for specific details.

Callouts in the image point to the "Employee Self-Service" tab, the "Detailed Navigation" sidebar, and the main content area.

Role specific tabs

Links to action areas

Display area

HR Generalist Tab

The screenshot shows the KHRIS Online Benefits Administration System interface. At the top, a navigation bar includes links for Training Liaison Administrators, Instructors, Employee Self-Service, My Benefits, Manager Self-Service, and HR Generalist. The HR Generalist tab is highlighted with a blue callout box. Below the navigation bar, a 'Welcome' message is displayed. The main content area features the Kentucky logo and a 'Detailed Navigation' menu. The 'KHRIS Processes' link in this menu is highlighted with a blue callout box. A dropdown menu for 'KHRIS Processes' is open, showing sub-categories like 'Benefits/Employee Processes' and 'Organizational Processes' with their respective sub-links. On the right side, there is a 'Worklist' section with a 'Tasks' tab and a table with columns for Subject, From, and Sent.

The HR Generalist tab allows you to select the KHRIS Processes link.

Selecting Process to Complete

There are two links used by PA to start the forms.

- Start Benefits/Employee Process – used to maintain information for existing employees
- Start Hiring Process – used for new employee set-up

The image displays two screenshots of the KHRIS web application. The top screenshot shows the 'Start Benefits/Employee Process' interface. It features a progress bar with five steps: 1. Select Employees, 2. Select Process (highlighted in yellow), 3. Fill Out Form, 4. Check and Send, and 5. Completed. Below the progress bar is a table with a 'View' dropdown set to 'Standard View'. The table lists various processes, with 'Change In Pay' highlighted in yellow. The bottom screenshot shows the 'Start Hiring Processes' interface. It has a progress bar with four steps: 1. Select Process (highlighted in yellow), 2. Fill Out Form, 3. Check and Send, and 4. Completed. Below the progress bar is another table with a 'View' dropdown set to 'Standard View'. The table lists hiring processes, with 'Appointment' highlighted in yellow.

Start Benefits/Employee Process

Employee: Haley Berry

1 Select Employees 2 **Select Process** 3 Fill Out Form 4 Check and Send 5 Completed

View [Standard View]

Process Name	Process Description
Change In Pay	Select this process for any
Leave With No Pay	Select this process to place
Leave With Pay	Select this process to place
Miscellaneous Actions	Select this process to perform change, or SSN change.
Position Number Change - External	Select this process for any
Position Number Change - Internal	Select this process for any
Qualifying Events	Submit Qualifying Event No
Retirement	Select this process to retire
Return From Suspension	Select this process to return
Return from Leave With Pay	Select this process to return

Start Hiring Processes

Start Processes

1 **Select Process** 2 Fill Out Form 3 Check and Send 4 Completed

View [Standard View]

Process Name	Process Description
Appointment	Select this process to appoint a new person to state government. The person will not exist in KHRIS with a PERNR.
Dual Appointment	Select this process to appoint a person that already holds another position either Commonwealth Paid or Commonwealth NonPaid. The person will already exist in KHRIS with another PERNR.
Rehire	Select this process to rehire a person. Examples include returning retirees, reinstatements, or re-employments. This person will already exist in KHRIS with a PERNR.

Select this process for any employee change in pay, not related to a position number change.

Reference Number:



Personnel Cabinet

Change In Pay

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: **Effective Date:** Nov 3, 2010

Basic Pay Change:

FROM: Pay Amount: 800.00

TO: Pay Amount: 0.00 **ACE Percentage:**

Additional Payment:

Pay Amount: **ERA Percentage:**

Remarks:

Exercise 2.1: Execute Change in Pay

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

An employee has completed their GED and is now eligible for a 5% increase in pay.



Select this process to place an employee on leave with pay.

- The employee status will remain active.

Reference Number: _____



Personnel Cabinet

Leave With Pay

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: <input type="text"/>	Effective Date: <input type="text" value="Nov 4, 2010"/>
-------------------------------------	--

Expected Return Date: <input type="text"/>
--

Remarks: <input type="text"/>

Return from Leave With Pay

Select this process to return an employee from leave with pay back to work.

Reference Number: _____



Personnel Cabinet

Return From Leave With Pay

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-98-0755	PayGrade: NON-PAID	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: Effective Date:

If the employee is returning to a new position, please enter the position number below.

Return to Position: <input type="text" value="99999999"/>	
Current Value	Proposed Value
Work Schedule: <input type="text" value="40HR24/7f"/>	Work Schedule: <input type="text"/>
Pay Amount: 80.000	Pay Amount: 800.00
Shift Premium Ind: <input type="text"/>	Shift Premium Ind: <input type="text"/>
Overtime Status: <input type="text"/>	Overtime Status: <input type="text"/>

Remarks:

Select this process to place an employee on leave without pay.

The employee status will change from active to inactive.

Reference Number: _____



Personnel Cabinet

Leave Without Pay

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: <input type="text"/>	Effective Date: <input type="text" value="Nov 3, 2010"/>
-------------------------------------	--

Expected Return Date: <input type="text"/>
--

Remarks: <input style="width: 90%;" type="text"/>

Return from Leave Without Pay

Select this process to return an employee from leave without pay back to work.

The employee status will change from inactive to active.

Note: When returning an employee from sick leave without pay, the remarks should include the dates of leave without pay and the date that the increment should be moved to (if applicable). If the remarks do not include this information, the HRG will be required to submit a subsequent action to ensure the employee is properly notified of any changes to the annual increment date.

Reference Number: _____



Personnel Cabinet

Return From Leave Without Pay

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-98-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10008088		
Position: 99999999		

Action Reason: Effective Date:

If the employee is returning to a new position, please enter the position number below.

Return to Position: <input type="text" value="99999999"/>	<input type="text"/>
Current Value	Proposed Value
Work Schedule: <input type="text" value="40HR24/7f"/>	Work Schedule: <input type="text"/>
Pay Amount: 80.000	Pay Amount: 800.00
Shift Premium Ind: <input type="text"/>	Shift Premium Ind: <input type="text"/>
Overtime Status: <input type="text"/>	Overtime Status: <input type="text"/>
Work Tax Area: <input type="text"/>	

Remarks:

Select this process to perform miscellaneous actions on an employee such as adjusting promotion date, increment date change, adjusting initial probation or social security number change.

Reference Number: _____



Personnel Cabinet

Miscellaneous Actions

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: <input style="width: 150px;" type="text"/>	Effective Date: <input style="width: 100px;" type="text" value="Nov 4, 2010"/>
---	--

Remarks: <input style="width: 90%; height: 20px;" type="text"/>

Exercise 2.2: Execute Return from Leave w/o Pay and Adjust Increment Date

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

An employee who has been on leave without pay for 2 months. We need to return them from Leave w/o Pay and adjust their increment date to reflect the time they were off without pay.



Position Number Change - External

Select this process for any position number change from one agency to another (different Appointing Authorities).

Reference Number: _____



Personnel Cabinet

Position Number Change - External

First Name:	Middle Name:	Personnel Number:
SSN:	Pay Grade:	Last Name:
Org Unit:		Work County:
Position:		

Action Reason:	Effective Date:
Receiving Agency HR Generalist	

New Position Overlap COS Requisition #:

Work Address:

Address Line 1	Address Line 2
City	State
County	ZIP Code

Default Work Schedule Actual Work Schedule

Shift Premium Indicator Time Card Required Overtime Status

Pay Type Pay Area Pay Grade

Pay Amount Actual Pay Amount

Work Area Tax Check Distribution Code

Retirement Code

Original Hire Date Current Hire Date

Remarks: _____

Position Number Change - Internal

Select this process for any position number change within the same agency.

Reference Number: _____

**Personnel Cabinet**
Position Number Change - Internal

First Name:	Middle Name:	Personnel Number:
SSN:	Pay Grade:	Last Name:
Org Unit:		Work County:
Position:		

Action Reason:	Effective Date:
----------------	-----------------

New Position Overlap COS Requisition #:

Work Address:

Address Line 1	Address Line 2
City	State
County	ZIP Code

Default Work Schedule	Actual Work Schedule
Shift Premium Indicator	Time Card Required
Pay Type	Pay Area
Pay Amount	Actual Pay Amount
Work Area Tax	Check Distribution Code
Retirement Code	
Original Hire Date	Current Hire Date

Remarks: _____

Exercise 2.3: Position Number Change - Internal

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

An employee is transferring to another department within their agency.



Select this process to place an employee on suspension.

- Employee status will remain active

Reference Number: _____



Personnel Cabinet

Suspension

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-98-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10008088		
Position: 99999999		

Action Reason: <input type="text"/>	Effective Date: <input type="text" value="Nov 4, 2010"/>
-------------------------------------	--

Return from Suspension Date: <input type="text"/>

Remarks: <input type="text"/>

Return From Suspension

Select this process to return a previously suspended employee back to work.

Reference Number:



Personnel Cabinet Return From Suspension

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-98-0755	Pay Grade:	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: Effective Date:

Remarks:

Select this process to retire an employee from state government.

The employee status will change from active to withdrawn.

Reference Number:



Personnel Cabinet Retirement

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10008088		
Position: 99999999		

Action Reason: Effective Date: Nov 4, 2010

Address Line 1	001001 MAIN STREET	Address Line 2	<input type="text"/>
City	Wilmore	State	KY
County	057	Zip Code	40390

Payroll Data:

Pay Type	99	Pay Area	99	Pay Grade	NON-PAID	Pay Amount	800.00
----------	----	----------	----	-----------	----------	------------	--------

Objects on Loan:

Delimit	Objects
<input type="text"/>	<input type="text"/>

Date Specifications:

Original Hire Date	Aug 15, 1977	Current Hire Date:	Aug 15, 1977
--------------------	--------------	--------------------	--------------

Remarks:

Select this process to separate an employee from state government for any reason other than retirement. The employee status will change to withdrawn.

Reference Number:



Personnel Cabinet Separation

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Berry
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10008088		
Position: 99999999		

Action Reason: Effective Date:

Address Line 1	<input type="text" value="001001 MAIN STREET"/>	Address Line 2	<input type="text"/>
City	<input type="text" value="Wilmore"/>	State	<input type="text" value="KY"/>
County	<input type="text" value="057"/>	Zip Code	<input type="text" value="40390"/>

Payroll Data:

Pay Type	99	Pay Area	99	Pay Grade	NON-PAID	Pay Amount	800.00
----------	----	----------	----	-----------	----------	------------	--------

Objects on Loan:

Delimit	Objects
<input type="text"/>	<input type="text"/>

Date Specifications:

Original Hire Date	<input type="text" value="Aug 15, 1977"/>	Current Hire Date:	<input type="text" value="Aug 15, 1977"/>
--------------------	---	--------------------	---

Remarks:

The Void or Correction form is used when a correction needs to be performed on employee data or to correct/remove a previously approved action.

You cannot enter a Void or Correction on an Appointed Employee until after the Effective Date of the Appointment action because the employee isn't active until this day.

Reference Number: _____



Personnel Cabinet

Void or Correction

Personnel Number: 00000005		
First Name: Haley	Middle Name: Regina	Last Name: Bery
SSN: 758-96-0755	Pay Grade: NON-PAID	Work County:
Org Unit: 10006088		
Position: 99999999		

Action: Action Reason: Void Correction Effective Date:

Remarks:

Note: Timely processing is imperative. Allowing a payroll to run prior to corrective action may alter or eliminate the ability to repair the record.

Agencies initiate a void or correction form on the Self Service Portal.

- **Upon approval, the action does not make the necessary changes; instead, the form actually directs the consultants in the Personnel Administration Branch to make the changes.**
 - Since the form is simply directions for what changes need to be made, the remarks field on this form is required. Explain the reason for action and be clear in providing directions.

Void Versus Correction

ACTION TYPE	REASONS FOR CORRECTION	REASONS FOR VOID
Appointment	<ul style="list-style-type: none"> ▪ Wrong action reason ▪ Wrong effective date ▪ Wrong position number ▪ Wrong salary 	<ul style="list-style-type: none"> ▪ Employee is a no show ▪ Employee later declines offer of employment
Re-Hire	<ul style="list-style-type: none"> ▪ Wrong action reason ▪ Wrong position number ▪ Wrong salary 	<ul style="list-style-type: none"> ▪ Employee is a no show ▪ Employee later declines offer of employment ▪ Wrong effective date
Reclassification	<ul style="list-style-type: none"> ▪ Wrong effective date ▪ Wrong salary 	<ul style="list-style-type: none"> ▪ Action processed in error ▪ Action processed in the incorrect order for calculating salary
Reallocation	<ul style="list-style-type: none"> ▪ Wrong effective date ▪ Wrong salary 	<ul style="list-style-type: none"> ▪ Action processed in error ▪ Action processed in the incorrect order for calculating salary
Position Number Change (Ext/Int)	<ul style="list-style-type: none"> ▪ Wrong effective date ▪ Wrong position number ▪ Wrong salary 	<ul style="list-style-type: none"> ▪ Action processed in error ▪ Action processed in the incorrect order for calculating salary
Change in Pay	<ul style="list-style-type: none"> ▪ Wrong effective date ▪ Wrong salary 	<ul style="list-style-type: none"> ▪ Action processed in the incorrect order for calculating salary ▪ Agency intended to mark the employee off of the mass update listing ▪ Mass update posted after separation, or other preceding action

Void Versus Correction

ACTION TYPE	REASONS FOR CORRECTION	REASONS FOR VOID
Suspension/Return from Suspension	<ul style="list-style-type: none"> ▪ Incorrect remarks ▪ Wrong effective date 	<ul style="list-style-type: none"> ▪ Action was overturned or adjusted by Board/Court order ▪ Appointing Authority decided to rescind the disciplinary action
Leave without Pay/Return	<ul style="list-style-type: none"> ▪ To correct remarks ▪ Wrong effective date 	<ul style="list-style-type: none"> ▪ Action was overturned or adjusted by Board/Court order ▪ Timesheet and leave/return action(s) disagree
Leave with Pay/Return	<ul style="list-style-type: none"> ▪ To correct remarks ▪ Wrong effective date 	<ul style="list-style-type: none"> ▪ Action was overturned or adjusted by Board/Court order ▪ Appointing Authority decided to rescind the placement on leave
Separation	<ul style="list-style-type: none"> ▪ To correct remarks ▪ Wrong action reason ▪ Wrong effective date 	<ul style="list-style-type: none"> ▪ Action was overturned or adjusted by Board/Court order ▪ Appointing Authority decided to rescind an involuntary separation or acceptance with prejudice ▪ Employee decided to rescind a voluntary resignation. ▪ Timesheet and separation action disagrees
Retirement	<ul style="list-style-type: none"> ▪ To correct remarks ▪ Wrong action reason ▪ Wrong effective date 	<ul style="list-style-type: none"> ▪ Action was overturned or adjusted by Board/Court order ▪ Appointing Authority decided to rescind acceptance with prejudice ▪ Employee decided to rescind a voluntary resignation. ▪ Timesheet and retirement action disagrees

Select this process to appoint a new person to KHRIS. The person will not exist in KHRIS with a PERNR.

Reference Number: _____



Personnel Cabinet
Appointment - New Employee

Action Reason: _____ Effective Date: _____ New Position:

Personnel Number: _____

First Name: _____ Middle Name: _____ Last Name: _____ Suffix:

SSN: _____ Pay Grade: _____ Work County: _____

Org Unit: _____

Position: _____

Gender: Date of Birth: _____ Overlap: COS Requisition #: _____

Home Address

Address Line 1: _____

Address Line 2: _____

City: _____

County:

State:

Zip Code: _____

Work Address

Address Line 1: _____

Address Line 2: _____

City: _____

County: _____

State:

Zip Code: _____

Default Work Schedule: _____ Work Schedule Rule:

Shift Premium Indicator: _____ Overtime Status: _____

Exercise 2.4: Execute Appointment – New Employee

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

An 18A agency appoints a new hire up to the midpoint of the grade of the position.



Select this process to appoint a person who already holds another position, either Commonwealth paid or Non-Commonwealth paid. The person will already exist in KHRIS, with another PERNR, and you will need to refer to this number to complete the Dual Appointment form. The form will then create a second PERNR for this position.

		Personnel Cabinet	
		Appointment - Dual Employee	
Action Reason: <input type="text"/>		Effective Date: Jan 2, 2013	New Position: <input type="text"/> <input type="button" value="Initialize"/>
Reference Personnel Number: <input type="text"/>		Personnel Number: 00000000	
First Name: <input type="text"/>	Middle Name: <input type="text"/>	Last Name: <input type="text"/>	Suffix: <input type="text"/>
SSN: <input type="text"/>	Pay Grade: <input type="text"/>	Work County: <input type="text"/>	
Org Unit: <input type="text"/>			
Position: <input type="text"/>			
Gender: <input type="text"/>	Date of Birth: <input type="text"/>	Overlap: <input type="checkbox"/>	COS Requisition #: <input type="text"/>
Home Address			
Address Line 1: <input type="text"/>			
Address Line 2: <input type="text"/>			
City: <input type="text"/>			
County: <input type="text"/>			
State: <input type="text"/>			
Zip Code: <input type="text"/>			
Default Work Schedule: <input type="text"/>		Work Schedule Rule: <input type="text"/>	
Shift Premium Indicator: 10		Overtime Status: <input type="text"/>	

Select this process to rehire a person who was employed in KHRIS. Examples include returning retirees, reinstatements or reemployments. This person will already exist in KHRIS with a PERNR.

Reference Number:



Personnel Cabinet Rehire

Action Reason: Effective Date: New Position:

Personnel Number:

First Name: Middle Name: Last Name: Suffix:

SSN: Pay Grade: Work County:

Org Unit:

Position:

Gender: Date of Birth: Overlap: COS Requisition #:

Home Address	Work Address
Address Line 1:	Address Line 1:
Address Line 2:	Address Line 2:
City:	City:
County: <input type="text"/>	County:
State: <input type="text"/>	State: <input type="text"/>
Zip Code:	Zip Code:
Default Work Schedule:	Work Schedule Rule: <input type="text"/>
Shift Premium Indicator:	Overtime Status:

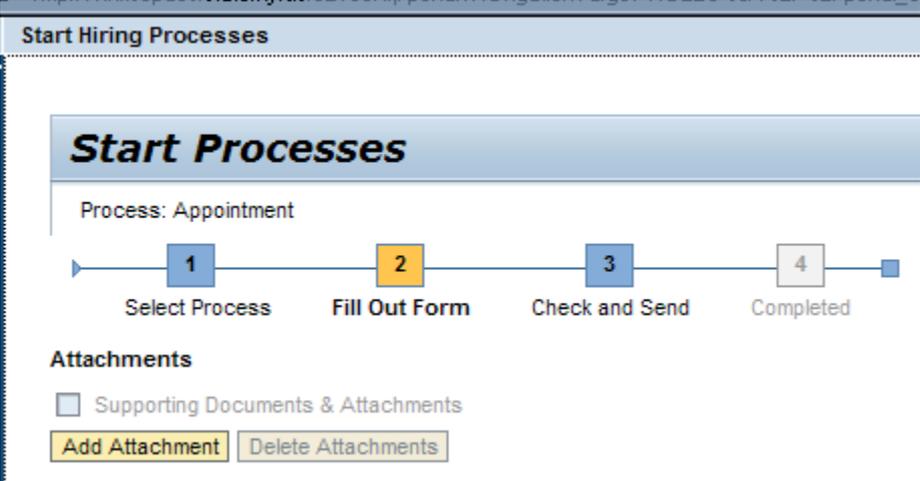
If you plan to rehire an employee who retired or separated prior to December 1, 2010, KHRIS will not recognize the person as a previous employee.

These actions will need to be processed as follows:

- If the former employee is receiving benefits (health insurance) through our retirement systems, the Action will be processed on the Dual Appointment form
 - The HRG will need to contact the Personnel Administration Branch for the reference Personnel Number
 - A second Personnel Number will be issued to the employee
- If the applicant is not receiving benefits (health insurance) through our retirement systems, the Action will be processed on the Appointment form

Attaching Documents to Forms

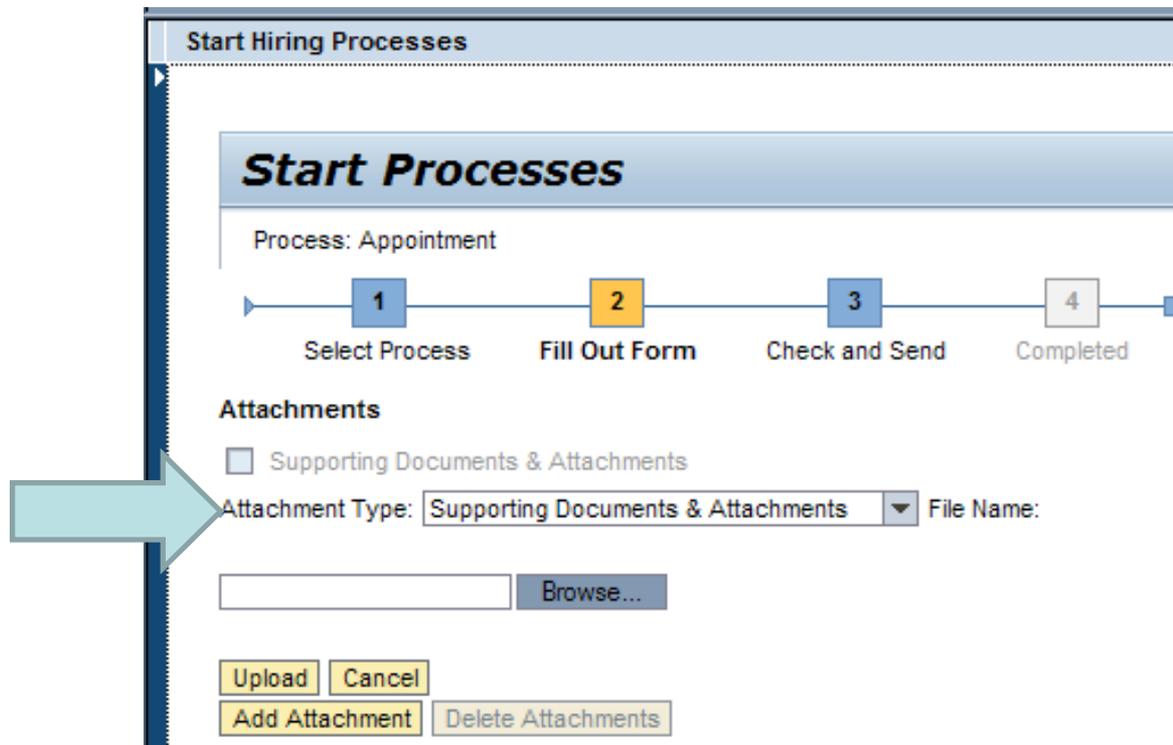
User should see attachment option at the top of the screen.



The screenshot displays the 'Start Hiring Processes' interface. At the top, there is a header 'Start Hiring Processes'. Below it, a section titled 'Start Processes' shows the current process as 'Appointment'. A workflow diagram consists of four steps: 1. Select Process (blue box), 2. Fill Out Form (yellow box), 3. Check and Send (blue box), and 4. Completed (grey box). Below the workflow, there is an 'Attachments' section with a checkbox labeled 'Supporting Documents & Attachments' and two buttons: 'Add Attachment' and 'Delete Attachments'. A large light blue arrow points from the left towards the 'Attachments' section.

Attaching Documents to Forms

Click the “Add Attachment” button and the “Attachment Type” appears.



The screenshot displays the 'Start Hiring Processes' interface. At the top, there is a header 'Start Hiring Processes' and a sub-header 'Start Processes'. Below the sub-header, the process is identified as 'Appointment'. A progress bar shows four steps: 1. Select Process, 2. Fill Out Form, 3. Check and Send, and 4. Completed. The 'Attachments' section is visible, featuring a checkbox for 'Supporting Documents & Attachments'. Below this, the 'Attachment Type' dropdown menu is highlighted with a large blue arrow, showing 'Supporting Documents & Attachments' selected. To the right of the dropdown is a 'File Name:' label. Below these elements is a text input field and a 'Browse...' button. At the bottom of the attachment section, there are buttons for 'Upload', 'Cancel', 'Add Attachment', and 'Delete Attachments'.

Attaching Documents to Forms

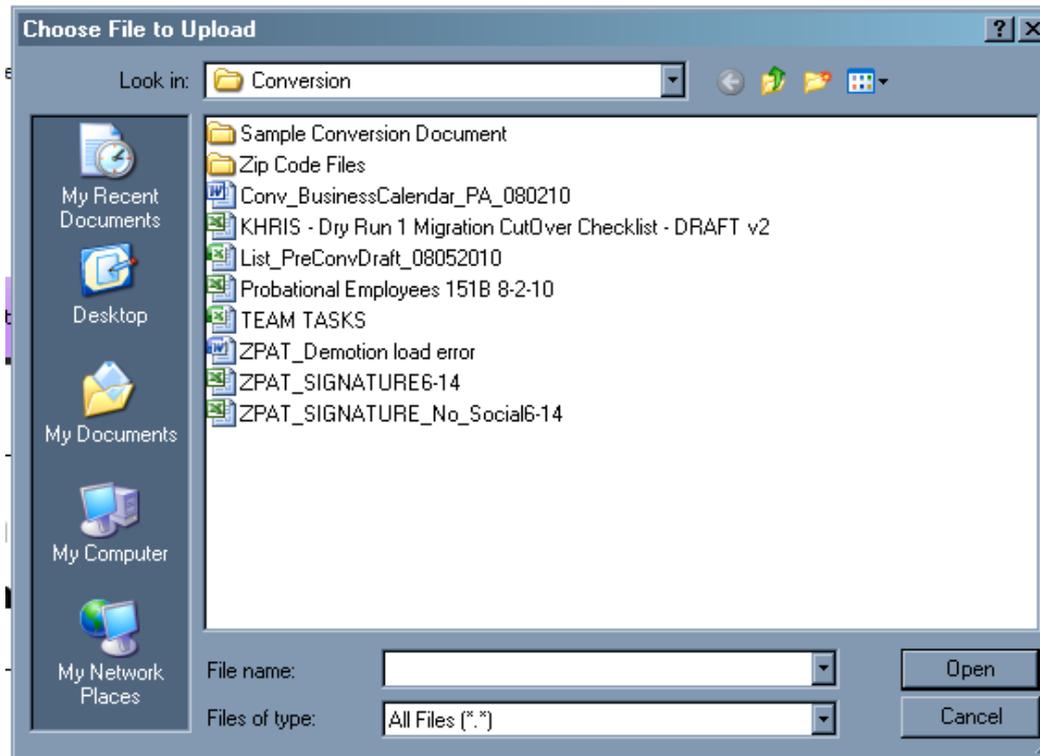
Click on “Browse” to search for the document on your computer.

The screenshot displays a web interface for 'Start Hiring Processes'. At the top, there is a header 'Start Hiring Processes' and a sub-header 'Start Processes'. Below the sub-header, it indicates 'Process: Appointment'. A horizontal process flow diagram shows four steps: 1. Select Process (blue box), 2. Fill Out Form (yellow box), 3. Check and Send (blue box), and 4. Completed (grey box). Below the process flow, there is an 'Attachments' section. It includes a checkbox for 'Supporting Documents & Attachments', which is currently unchecked. Underneath, there is a dropdown menu for 'Attachment Type' set to 'Supporting Documents & Attachments' and a 'File Name:' label. A text input field is followed by a 'Browse...' button. At the bottom of the attachments section, there are four buttons: 'Upload', 'Cancel', 'Add Attachment', and 'Delete Attachments'. A large blue arrow points from the left towards the 'Browse...' button.

Attaching Documents to Forms

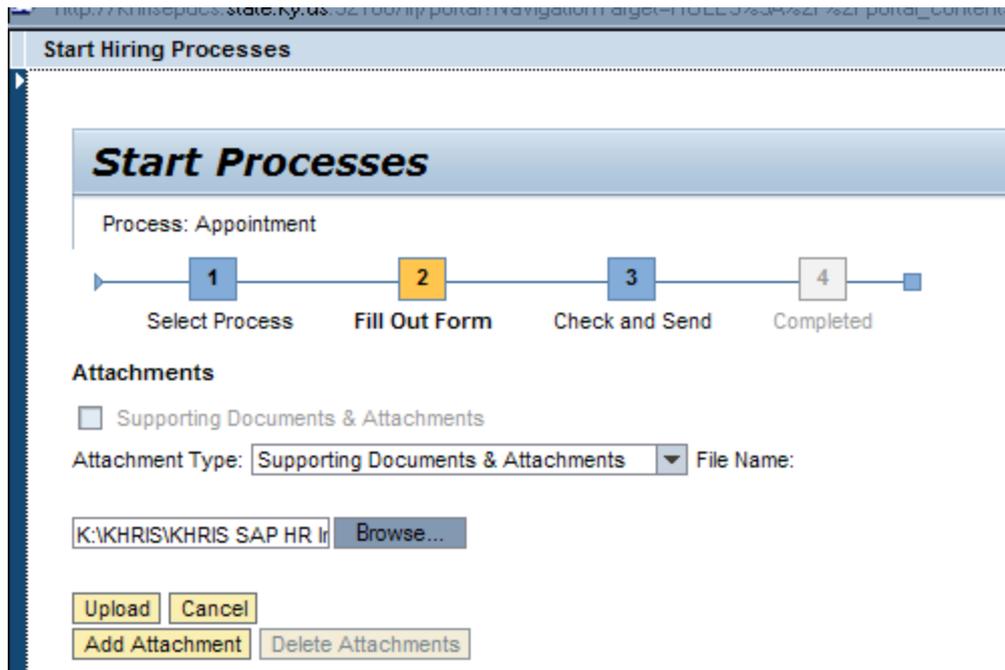
User will select the File to upload and click Open.

Document path will display on the screen and the user can select Upload.



Attaching Documents to Forms

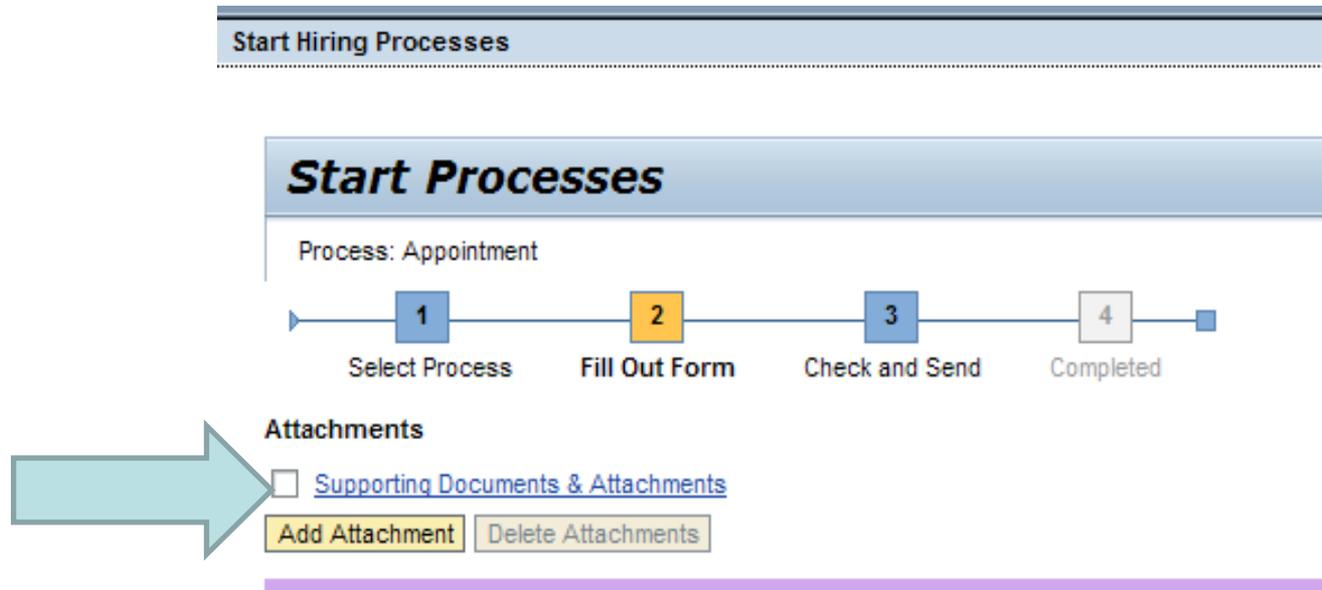
User can continue same process to add additional documentation.



The screenshot displays a web application interface for starting hiring processes. At the top, the browser address bar shows a URL from 'http://khris.epics.state.ky.us'. The page title is 'Start Hiring Processes'. Below this, a section titled 'Start Processes' shows the current process as 'Appointment'. A progress bar indicates four steps: 1. Select Process (blue), 2. Fill Out Form (yellow), 3. Check and Send (blue), and 4. Completed (grey). Below the progress bar, the 'Attachments' section is visible, featuring a checkbox for 'Supporting Documents & Attachments', a dropdown menu for 'Attachment Type' set to 'Supporting Documents & Attachments', and a 'File Name:' field. A file path 'K:\KHRIS\KHRIS SAP HR I...' is entered in the file name field, with a 'Browse...' button next to it. At the bottom of the attachment section, there are buttons for 'Upload', 'Cancel', 'Add Attachment', and 'Delete Attachments'. A large light blue arrow points from the left towards the 'Attachments' section.

Attaching Documents to Forms

User can view attached documents by clicking on the Supporting Documents & Attachments link.



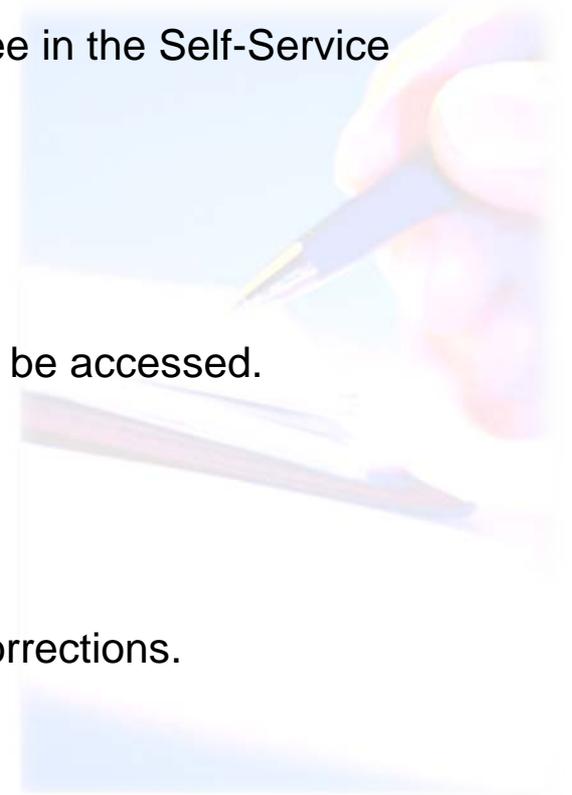
Knowledge Check

1. Which infotype is accessed on every form?
 - a. 0002 Personal Data
 - b. 0000 Actions
 - c. 0001 Organizational Assignment

2. Which of the following determines what you are able to see in the Self-Service Center?
 - a. Transaction codes
 - b. PERNR
 - c. Security role

3. The following link requires a PERNR before the form may be accessed.
 - a. Start Benefits/Employee Process
 - b. Start Hiring Process
 - c. KHRIS Processes

4. True or False? Remarks are required on all voids and corrections.



In this lesson you learned to:

- Explain actions and how they are used
- Identify the Personnel Administration forms to complete actions
- Review the various personnel action forms
- Complete the steps to submit various personnel action forms
- Attach documents to personnel action forms





Workflow

Lesson 3

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

By the end of this lesson participants will be able to:

- Explain the purpose of the workflow
- Access worklists to monitor forms
- Understand the workflow steps
- Track and/or withdraw an action in workflow
- View KHRIS screens to review updated infotypes

Personnel Administration Forms Approval Process



- HRG completes form and initiates workflow



- KHRIS routes form through agency workflow



- Final Agency Approver completes agency workflow



- KHRIS routes form through Personnel Cabinet workflow



- Personnel Cabinet approves or rejects form



- If approved, infotypes are added and/or changed
- If rejected, infotypes are not updated

- Workflow will appear in the Level Approvers worklist
 - Approvers are identified in a pre-determined order. For example, there may be 2 Level 1 approvers, and one Level 2 approver
- If more than one person sits at an approval level, once the action is “picked” up by one person, it will be removed from the other user’s worklist
 - If not approved within 3 business days it will automatically go to the next Agency approver
- Workflow must be approved by Final Agency Approver prior to submission to Personnel Cabinet
 - The form will not leave the Agency until it has been approved by Final Agency Approver
- The originator of the form will be notified by email
 - An email will be sent upon decision by the Agency Final Approver
 - An email will be sent upon decision by the Personnel Cabinet

KHRIS Approval

- Configured to automatically route workflow items to the appropriate approver or approvers.
- Records waiting for approval are accessed through the portal in the approver's Universal Worklist (UWL)

Tasks (8 / 8) Alerts Notifications Tracking

Show: New and In Progress Tasks (8 / 8) All

Subject	From	Sent	Priority	Due	Status
-) for COOK I in Org# 11000325	Workflow System	Oct 30, 2008	Normal	1	New
-) for KVE MAJOR in Org# 11000325	Workflow System	Oct 30, 2008	Normal	1	New
-) for ADMINISTRATIVE SECRETARY in Org# 11000325	Workflow System	Oct 28, 2008	Normal	1	New
-) for ADMINISTRATIVE SPECIALIST III in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for ATTORNEY in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for ATTORNEY in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for ATTORNEY in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New
-) for FINGERPRINT SPECIALIST I in Org# 11000325	Workflow System	Oct 27, 2008	Normal	1	New

Log on to Employee Self-Service (ESS)

Welcome

User ID *

Password *

Logon Problems? [New User/Reset Password](#)

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Click the Worklist tab.

The screenshot displays the KHRIS (Kentucky Human Resource Information System) user interface. At the top, there is a navigation bar with several tabs: "Employee Self-Service", "HR Generalist", "Image Connect", "Worklist", and "Employee Suggestion System". The "Worklist" tab is highlighted with a red rectangular box. To the right of the navigation bar, there is a search field and a "Log off" link. Below the navigation bar, the main content area is divided into several sections. On the left, there is a vertical sidebar with a blue background and white text, containing a "Welcome" message and a list of menu items: "Open Enrollment", "Benefits Information", "Payment Information", "Employee Search", "Personal Information", and "Working Time". The main content area features a large red button labeled "ENROLL NOW" with a right-pointing arrow. Below this button, there are three main sections: "Open Enrollment", "Benefits Information", and "Payment Information". Each section includes a brief description and several hyperlinks. The "Open Enrollment" section mentions that enrollment will be open from October 01 to 31, 2013, and provides a link to "START MY BENEFIT ENROLLMENT". The "Benefits Information" section describes how to view benefit selections and provides links for "Enrollment Overview", "External Organizations as Beneficiaries", "Family Members/ Dependents/ Beneficiary Records", and "Life Insurance Beneficiary Change". The "Payment Information" section describes how to review salary statements and provides links for "Salary Statement", "Tax Withholding", and "W2 Reprint Request". To the right of these sections, there are three more sections: "Employee Search", "Personal Information", and "Working Time". Each of these sections includes a brief description and several hyperlinks. The "Employee Search" section provides a link to "Who's Who". The "Personal Information" section provides links for "Addresses", "Bank Information for Direct Deposit", "Emergency Contacts", and "Personal Data". The "Working Time" section provides links for "Leave Balance Overview", "Leave Balance Value", and "Time Statement". At the bottom of the main content area, there is a blue bar labeled "Important Information".

Welcome

Search: Having trouble viewing, click here Log off

Employee Self-Service HR Generalist **Worklist** Employee Suggestion System

Full Screen

ENROLL NOW →

Open Enrollment
Enrollment will be open October 01 - 31, 2013. The enrollment process takes 20 minutes or less to complete.
[*** START MY BENEFIT ENROLLMENT ***](#)

Employee Search
Search for employees by name and find basic information about colleagues.
[Who's Who](#)

Personal Information
Maintain your addresses, emergency contacts, bank information and personal data.
[Addresses](#)
Home and Email addresses
[Bank Information for Direct Deposit](#)
[Emergency Contacts](#)
[Personal Data](#)

Working Time
Check your leave balances, request overtime, review your time statement.
[Leave Balance Overview](#)
[Leave Balance Value](#)
[Time Statement](#)

Benefits Information
Here you can view your current benefit selections, family member / dependent / beneficiary records and identify external organizations (such as charities) to designate as your beneficiaries.
[Enrollment Overview](#)
[External Organizations as Beneficiaries](#)
[Family Members/ Dependents/ Beneficiary Records](#)
[Life Insurance Beneficiary Change](#)

Payment Information
Review your salary statements, change your tax withholdings or request a W2 reprint.
[Salary Statement](#)
[Tax Withholding](#)
[W2 Reprint Request](#)

Important Information

Your worklist will be displayed.

Employee Self-Service | Insurance Coordinator NCP2 | Insurance Coordinator NCP1 | HR Generalist | **Worklist**

Overview

Worklist | History | Back

Tasks (22 / 24) | Tracking

Show: New and In Progress Tasks (22 / 24) | Select a Subview... | All | Show Filters | Hide Pr

Subject	From	Sent	Priority	Due	Status
(Rtrn from leave W/O pay - Other) for Mary Washington in agency 53721	Sopp, Gaye	Jan 12, 2011	Normal	1	New
(Leave W / Pay - Educational) for Cindy J Brady in agency 55790	Pereira, Linkin	Dec 7, 2010	Normal	1	New
(Leave W / Pay - Educational) for Cindy J Brady in agency 55790	TEST 03, Workflow	Dec 7, 2010	Normal	1	New
(Leave W / Pay - Educational) for Cindy J Brady in agency 55790	Pereira, Linkin	Dec 7, 2010	Normal	1	New
(Position Number Change-Interna - Promotion) for Happy Gilmore in agency 54527	Banks, Derrick	Jan 25, 2011	Normal	1	In Progr
(Separation - O - Deceased) for Nina Bostic in agency 55790	Shelton, Lisa	Mar 15, 2011	Normal	1	In Progr
(Leave W / Pay - Educational) for Larry Test in agency 53721	Sopp, Gaye	Dec 8, 2010	Normal	1	New
(Misc. Actions - Adj. Promo Date) for David Chan in agency 10010	Banks, Derrick	Mar 15, 2011	Normal	1	Dec 30, 9999
PAYROLL ONLY: Work County Change - Approval	Pereira, Linkin	Mar 14, 2011	Normal	1	Dec 30, 9999
(Appointment - Appointment) for Test R Tester in agency 10010	Taulbee, Angie	Mar 8, 2011	Normal	1	Dec 30, 9999

Row 1 of 24

(Rtrn from leave W/O pay - Other) for Mary Washington in agency 53721

Sent: Jan 12, 2011 12:52 PM by Sopp, Gaye | Priority: Normal

Status: New

Forward | Assign To Me | launchView

You can also: [View History](#)

Any column can be sorted in ascending order or descending order by clicking on the header. (ex. Clicking on the Sent Date header will sort by the date the form was sent.)

Subject	From	Sent Date	Priority	Due Date	Status
(Appointment - Appointment) for New Hire1 in agency 55793	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire2 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire4 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire5 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire6 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire6 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire8 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New Hire9 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New1 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New2 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New

Filtering Your Worklist - Workflow

There are several ways to filter your worklist.

1 The first drop down list shows the following options.

The screenshot shows a worklist interface with a navigation bar containing 'Tasks (74 / 75)', 'Alerts', 'Notifications', 'SAPoffice Mails', and 'Tracking'. Below the navigation bar, there is a 'Show:' dropdown menu that is open, displaying two options: 'New and In Progress Tasks (74 / 75)' and 'New and In Progress Tasks (74 / 75)'. To the right of this menu is another dropdown menu labeled 'Select a Subview...' with a downward arrow. Further right is a third dropdown menu with 'All' selected. Below these menus is a table with columns for 'Subject', 'Tasks (74 / 75)', and 'From'. The table contains several rows of task entries, including 'Tasks Forwarded to Someone', 'Tasks for Resubmission', 'Completed Tasks', and 'Assigned to Substitute', each with a corresponding task ID and the name 'Lakshmanap'.

2 The second drop down list only has one available option; it allows you to select the tasks.

3 Here are the available options on the third drop down list.

The screenshot shows a close-up of the worklist interface. The 'Show:' dropdown menu is set to 'New and In Progress Tasks (74 / 75)'. The 'Select a Subview...' dropdown menu is also visible. The third dropdown menu is open, showing a list of options: 'All', 'All', 'New', 'In Progress', 'Due Today', and 'Overdue'. The 'All' option is highlighted in yellow. Below the dropdown menu is a table with columns for 'Subject' and '!' (status indicator). The table contains several rows of task entries, including 'Appointment - Appointment) for New6 Hire in agency 31095', 'Appointment - Appointment) for New5 Hire in agency 31095', and 'Appointment - Appointment) for New4 Hire in agency 31095'.

Additional Filtering Information - Workflow

Display additional options for advanced filtering by clicking on the filter icon on the right of the worklist.



Key word filters become available across the column headers. For example, you may search for a specific employee's name (Smith) in the subject or a specific type of action (Appointment).

Subject	!	From	Sent Date	Priority		Due Date	Status

Forwarding a Worklist Item - Workflow

1

**Right click the item hyperlink from the worklist.
(Subject Column)**

2

Select Forward from the menu.



(Appointment - Appointment) for New6 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New5 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New4 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New3 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New2 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New1 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New

- Forward
- Assign To Me
- Open Form
- Add Note
- View History

Forwarding a Worklist Item - Workflow

3

Click the Select button to check names and find people.

Universal Worklist: Forward Items (Position Number Change-Inter

You can forward the item to one or more users. Select the new assignee(s) and click "Submit."

4

Type in last name then click Search.

Search For People
Search For Names:

5

When the name populates click Apply.

Search For People
Search For Names:

Current Selection	
<input checked="" type="checkbox"/>	Kennedy, Mark
<input type="checkbox"/>	

Forwarding a Worklist Item - Workflow

6

Name will populate. Click Submit.

Universal Worklist: Forward Items (Position Number Change-Intern - Promotion) for Happ
You can forward the item to one or more users. Select the new assignee(s) from the list of possible rec
"Submit."

Kennedy, Mark



7

Success message will display.

 Item was forwarded successfully

Assigning a Worklist Item - Workflow

1

If you click or open the task it gets assigned to you. No one else can see it. You can explicitly assign it to you by right clicking on the item hyperlink and selecting the Assign To Me option from the menu, in case you want to hold it without opening it.

(Appointment - Appointment) for New6 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New5 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New4 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New3 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New2 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New1 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New

2

Once it is assigned to you, the option changes to Cancel Assignment.

(Appointment - Appointment) for New6 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	In Progress
(Appointment - Appointment) for New5 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New4 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New3 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New2 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New1 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New

Approving or Rejecting a Worklist item - Workflow

1 Double Click on the Worklist item.

2 After the form appears, review it and click Approve or Reject.

Return from Leave Without Pay - Approve

Employee: Mary Washington

▶ [People Involved in Process](#)

Please fill out the following form. You can save data typed into this form.

Highlight Field

Reference Number: 000000000291



Personnel Cabinet Return From Leave Without Pay

Personnel Number: 00000299

First Name: Mary

Middle Name:

Last Name: Washington

SSN: 329-01-8876

Pay Grade: 00

Work County: Franklin

Org Unit: 10003578 Office of the Secretary

Position: 30027170 09650V000101

Action Reason: Other

Effective Date: Jan 12, 2011

Approve Reject

To See Where Action was Initiated - Workflow

Click

▶ [People Involved in Process](#)

Once expanded, it will provide details on the action processing:

▼ [People Involved in Process](#)

Processor	Description	Start Date	End Date	Status
Workflow TEST 03	(Separation - O - Deceased) for Nina Bostic in agency 55790	03/15/2011 18:54:31		SELECTED
Workflow TEST 03	(Separation - O - Deceased) for Nina Bostic in agency 55790	03/15/2011 17:44:41	03/15/2011	Completed
Lisa Shelton	Nina Bostic: Separation - Initiate	03/15/2011 17:44:15	03/15/2011	Completed

View History:

(Appointment - Appointment) for New6 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New5 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New4 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New3 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New2 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New1 Hire in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New
(Appointment - Appointment) for New Hire9 in agency 31095	Lakshmanaperumalraja, Aruna	Jan 13, 2014	Medium		Dec 30, 9999	New

This will display the workflow tasks content without actually “assigning” the task to you.

Tracking Tab - Workflow

The Tracking Tab shows your items and the status with the process reference number.

Worklist

Tasks Tracking (15)

Show: All [Show Filters](#)

Subject	From	Sent	Priority		Due	Status
00000000413: Process Position Number Change - Internal	Campbell, Wendy	Yesterday	Normal	1		Completed
00000000380: Process Change In Pay	Campbell, Wendy	Mar 2, 2011	Normal	1		Completed
00000000374: Process Position Number Change - External	Campbell, Wendy	Feb 25, 2011	Normal	1		In Progress
00000000371: Process Appointment	Campbell, Wendy	Feb 25, 2011	Normal	1		Completed
00000000370: Process Appointment	Campbell, Wendy	Feb 24, 2011	Normal	1		Completed
00000000369: Process Separation	Campbell, Wendy	Feb 21, 2011	Normal	1		Completed
00000000368: Process Appointment	Campbell, Wendy	Feb 21, 2011	Normal	1		Completed
00000000367: Process Suspension	Campbell, Wendy	Feb 18, 2011	Normal	1		Completed
00000000318: Process Appointment	Campbell, Wendy	Jan 20, 2011	Normal	1		Completed
00000000317: Process Appointment	Campbell, Wendy	Jan 20, 2011	Normal	1		Completed

Row 1 of 15

[View Detail](#)

Position Number Change External Workflow

Position Number Change External

- If you are the HR Generalist at the "losing" agency you will only complete the action reason and effective date before selecting the HR Generalist at the "receiving" agency to send the HCMPF form to via workflow
- The form will then move through the workflow approval process at the "losing" agency before being sent to the HR Generalist at the "receiving" agency for completion
- The "receiving" agency HR Generalist will then complete the form and it will electronically workflow through that agency for approval
- The form will then be sent to the Personnel Cabinet for Final Approval

Knowledge Check

1. True or False? Workflow is set up the same way for every action.
2. True or False? Workflow must be approved by Final Agency Approver prior to submission to the Personnel Cabinet.



In this lesson you learned to:

- Explain the purpose of the workflow
- Access worklists to monitor forms
- Understand the workflow steps
- Track and/or withdraw an action in workflow
- View KHRIS screens to review updated infotypes





Maintain Master Data

Lesson 4

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

By the end of this lesson participants will be able to:

- Identify the infotypes used to maintain employee master data
- Explain date specifications

Transaction PA30 is used to maintain master data in KHRIS.

Maintain HR Master Data

Personnel no. 5
Name Haley Berry Status Inactive
EE group L External - BN Personnel area 0004 Benefits Only
EE subgroup 41 24 Non-Paid Pers. subarea 2001 Board of Ed.

Basic personal data Payroll Benefits Time Taxes Planning Data

Infotype text	E
0000 Actions	✓
0001 Organizational Assignment	✓
0002 Personal Data	✓
0006 Addresses	✓
0007 Planned Working Time	✓
0008 Basic Pay	✓
0009 Bank Details	
0019 Monitoring of Tasks	
0023 Other/Previous Employers	

Period
 Period
From [] To []
 Today Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year
Choose

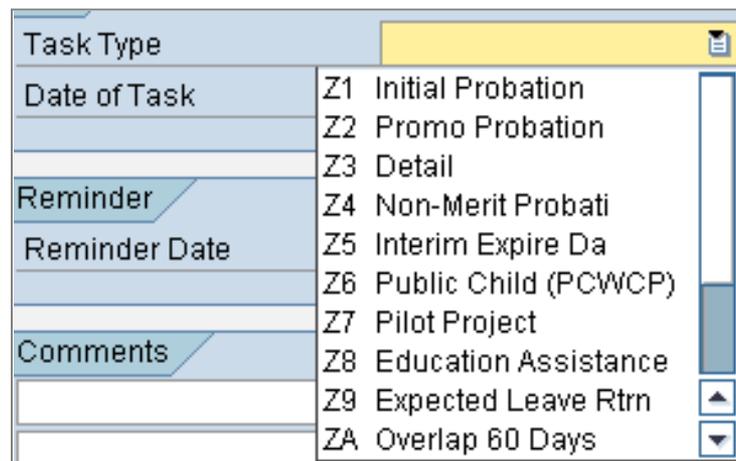
Direct selection
Infotype [] STy []

Gather Data

- It is a good practice to gather all of the employee's information before initiating an action

Monitoring of Dates – IT 0019:

- This infotype is like a tickler file and is date driven
- Reminder dates should be two weeks before the end date of the task
- HRG's are responsible for generating the report of reminder date notifications. The transaction code is ZPAQ0031.

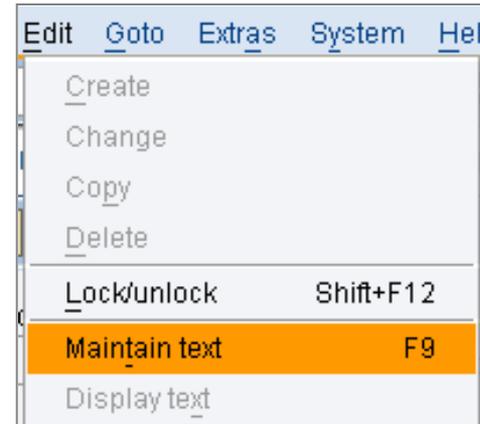


The screenshot shows a SAP dialog box for selecting a task type. The dialog has a title bar 'Task Type' and a list of options. The options are: Z1 Initial Probation, Z2 Promo Probation, Z3 Detail, Z4 Non-Merit Probati, Z5 Interim Expire Da, Z6 Public Child (PCWCP), Z7 Pilot Project, Z8 Education Assistance, Z9 Expected Leave Rtrn, and ZA Overlap 60 Days. The list is scrollable and has a search icon in the top right corner.

Task Type	Description
Z1	Initial Probation
Z2	Promo Probation
Z3	Detail
Z4	Non-Merit Probati
Z5	Interim Expire Da
Z6	Public Child (PCWCP)
Z7	Pilot Project
Z8	Education Assistance
Z9	Expected Leave Rtrn
ZA	Overlap 60 Days

Comments

- The Comments function is useful as you are entering data
- Select Edit > Maintain text from the menu
- A window displays where you can enter comments
- It is a good idea to preface your comment with the date and your name
- Available in IT's 0000, 0001, 0007, 0008, 0019, 0041, 0077, 0094, and 0105



Infotype 0041

- Stores date types used by Benefits and other HR functions for all permanent employees
- Provides an overview of the employee's state career
- Benefits basis benefits eligibility on date types contained in IT 0041
- Only Personnel Cabinet will have access to directly maintain Date Specifications
- Employee Status is maintained on this infotype and will be updated by a nightly Batch Job

Z1	Original Hire Date
Z2	Current Hire Date
Z3	Increment Date
Z4	Career Ladder Date
Z5	Benefits Elig. Date
Z6	XRef Benefits Elig
Z7	FSA QE Sign. Date
Z8	Health QE Sign. Date
Z9	Life QE Sign. Date
ZA	ACE Award
ZB	ERA Award

Exercise 4.1: PA30 Maintain Master Data

Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

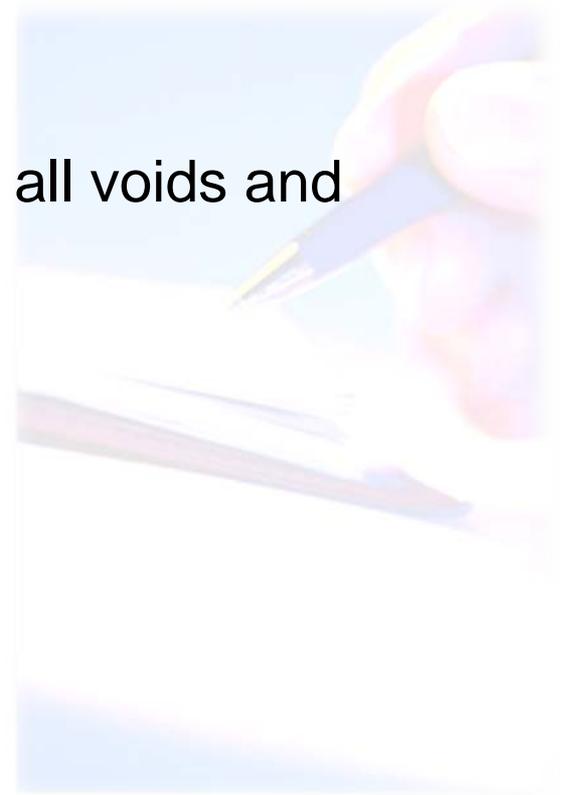
Purpose:

You will access master data to change an employee's ethnic origin and home address.



1. Only the Personnel Cabinet can maintain this infotype.
 - a. 0002 Description
 - b. 0019 Monitor Dates
 - c. 0041 Date Specifications

2. True or False? Remarks are required on all voids and corrections.



In this lesson you learned to:

- Identify the infotypes used to maintain employee master data
- Explain date specifications





Reports

Lesson 5

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

By the end of this lesson participants will be able to:

- Identify the reports used for Personnel Administration
- Navigate a report

The term *reporting* refers simply to the display of data on one or more objects.

Reports are created by two types of transactions:

- **Display** transactions, which report data on one object
- **List-display** transactions, which report data on multiple related objects

Display transactions call up individual master records and documents so that they can be examined in all their detail.

The initial screens of KHRIS HR display transactions usually require:

- Object type code
- Object identification code
- Reporting dates
- Selection of infotype to be displayed

List-display transactions offer the greatest versatility and depth of reporting:

- Advanced methods of data entry enable you to define relationships between multiple objects
- Initial screens can be customized for fast entries
- Data is reported in an easy-to-read line-item table that can be customized
- Reports can be “drilled down into” for displays of single master records or documents
- Most reports can be exported to *Excel*

Personnel Administration Reports

Title	Transaction	Description
Date Monitoring	ZPAQ0031	This report enables you to create a list of tasks that an employee has during a selected period.
Reference Personnel Number	S_AHR_61016358	If an employee has more than one work relationship, you can assign a reference personnel number for each relationship. You can then record this, for example, in the Actions infotype (0001) when an employee is hired.
Flexible EE Data	S_AHR_61016362	This report displays employee data in a flexible manner. In other words, the report only displays data on employees who meet your own selection criteria.

Personnel Administration Reports

Title	Transaction	Description
Head Count Changes	S_L9C_940000095	This report creates a list of personnel actions that have been carried out for employees for the selected time period.
Statistics: Gender by Age	S_PH9_46000218	This report creates a list of employees' age according to gender.
APP: Turnover Analysis Rpt	S_AHR_61016154	This report shows the Employee turnover for a given time period for Affirmative Action analysis.
EEO-4 Report	P0000_M10_EEO_PBS	EEO Compliance Report

Personnel Administration Reports

Title	Transaction	Description
New Hire Reporting	S_AHR_61016150	This is a flexible report that runs user-specific requests.
Infotype Overview for Employee	S_AHR_61015471	Infotype for Overview for Employee
Action/Title/Grade/Salary by Cabinet	ZPAQ0039	This report can be used to list personnel and organizational actions for employees.
Employee Reference ID with Title, Grade, Salary by Agency	ZPAQ0038	Displays employees' reference IDs with their title, grade and salary by agency.

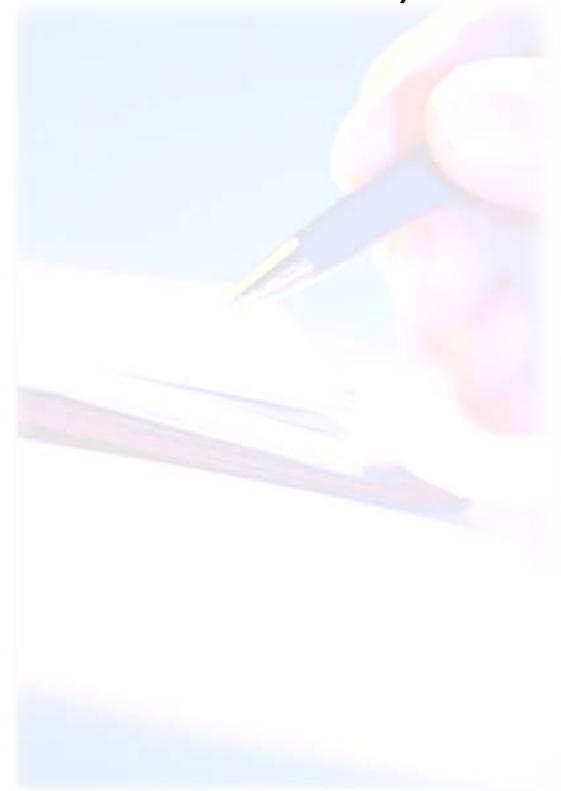
Exercise 5.1: Navigate a Report

Follow along as your instructor leads you through the steps.

Purpose:

The instructor will guide you through the basic steps to complete the navigation of a report.

1. True or False? List display transactions offer information on multiple objects.
2. When should you run (or when is it recommended to run) the report ZPAQ0031?



In this lesson you learned to:

- Identify the reports used for Personnel Administration
- Navigate a report





Wrap-up

Participants should now be able to:

- Discuss integration of Organizational Management and Personnel Administration (PA)
- Define PA key terms
- Define infotypes and subtypes
- Identify and review PA forms
- Perform personnel actions based on receipt of forms
- Execute PA reports

Organizes employee master data	Put an end to a previous record	Best described as a record in an employee file
These are accessed in the Self-Service Center	Manually enters the infotypes for Voids and Corrections	These are based on organization, agency, and assigned tasks
This form does not update info in KHRIS	Define the life span of an infotype	Automatically routes items to the approver

Questions and Answers



Your feedback is invaluable to the success of KHRIS



- Review course materials
- Access HR Administrators Web site
- Access KHRIS Web site
- Complete any necessary online training (for example, ESS/MSS eLearning)
- Watch for ongoing KHRIS communications and training updates

