Kentucky Human Resource Information System

Connecting the Commonwealth

Personnel Administration

Course Map

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

Course Objectives

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

Kentucky Human Resource Information System

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Personnel Administration Overview

Lesson 1

Course Map

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Wrap Up

Lesson 1 Objectives

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

Key Terms

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

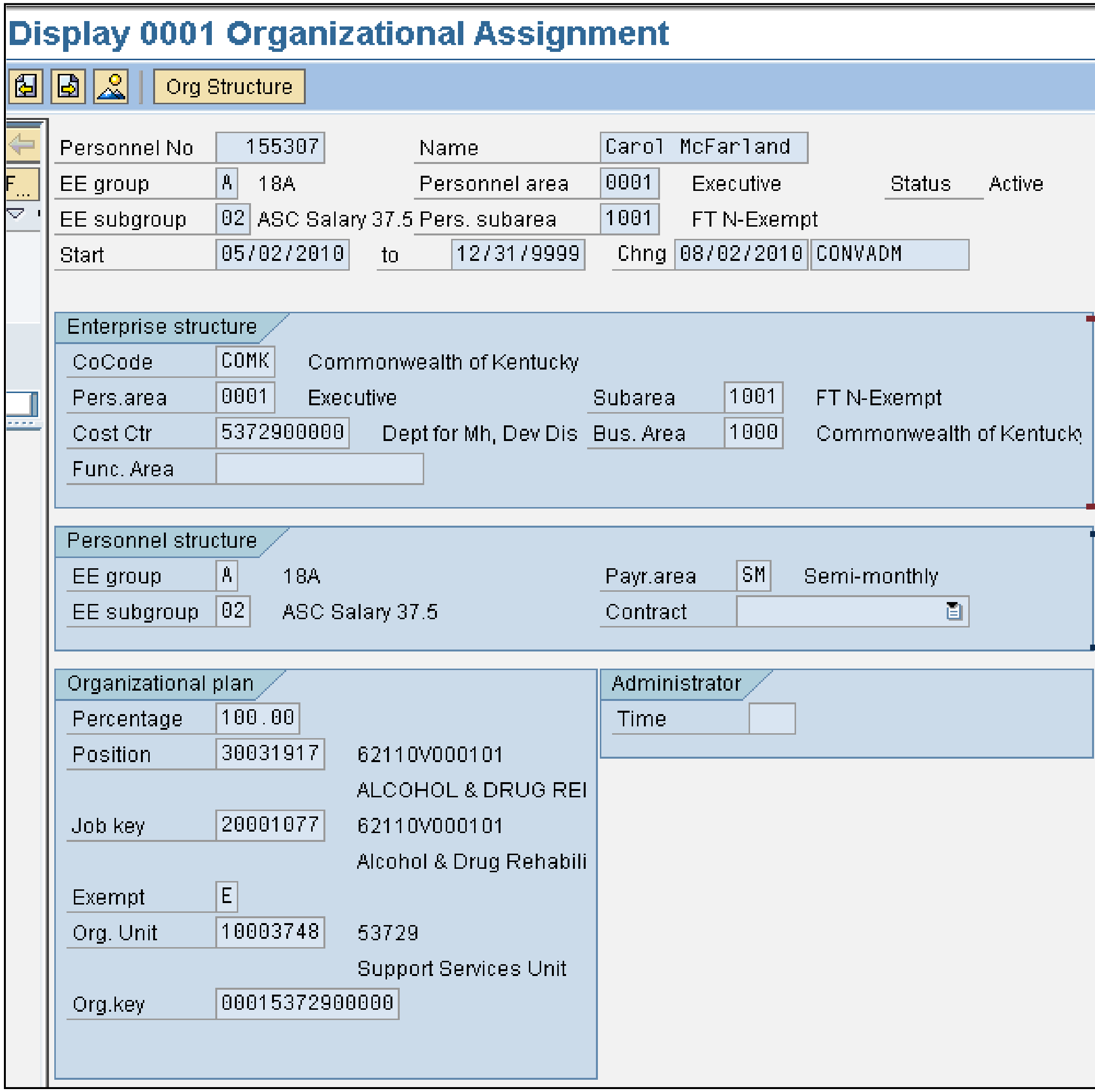
OM Components

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



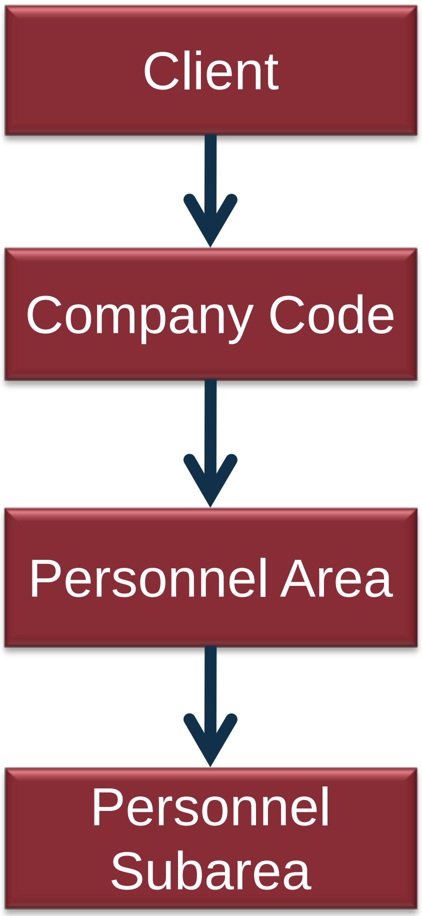
Enterprise structure

Personnel structure

Organizational structure

The Enterprise Structure

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



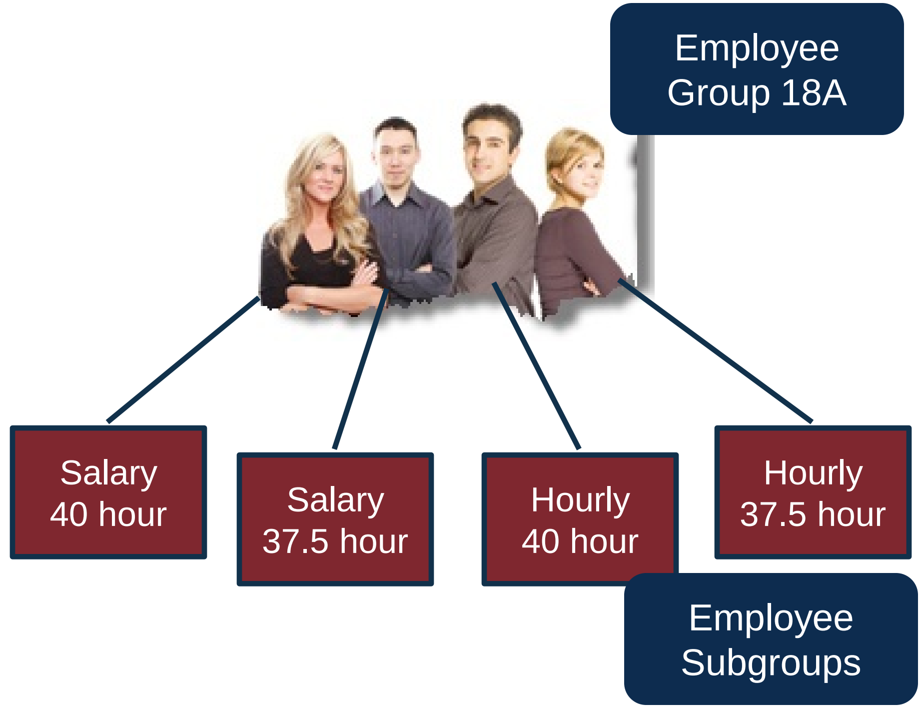
- The client is an independent legal and organizational unit of the system
- The company code is an independent company with its own accounting unit; a single company code was created in KHRIS called COMK – Commonwealth of Kentucky
- A personnel area is a unit in Personnel Administration. It represents 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.

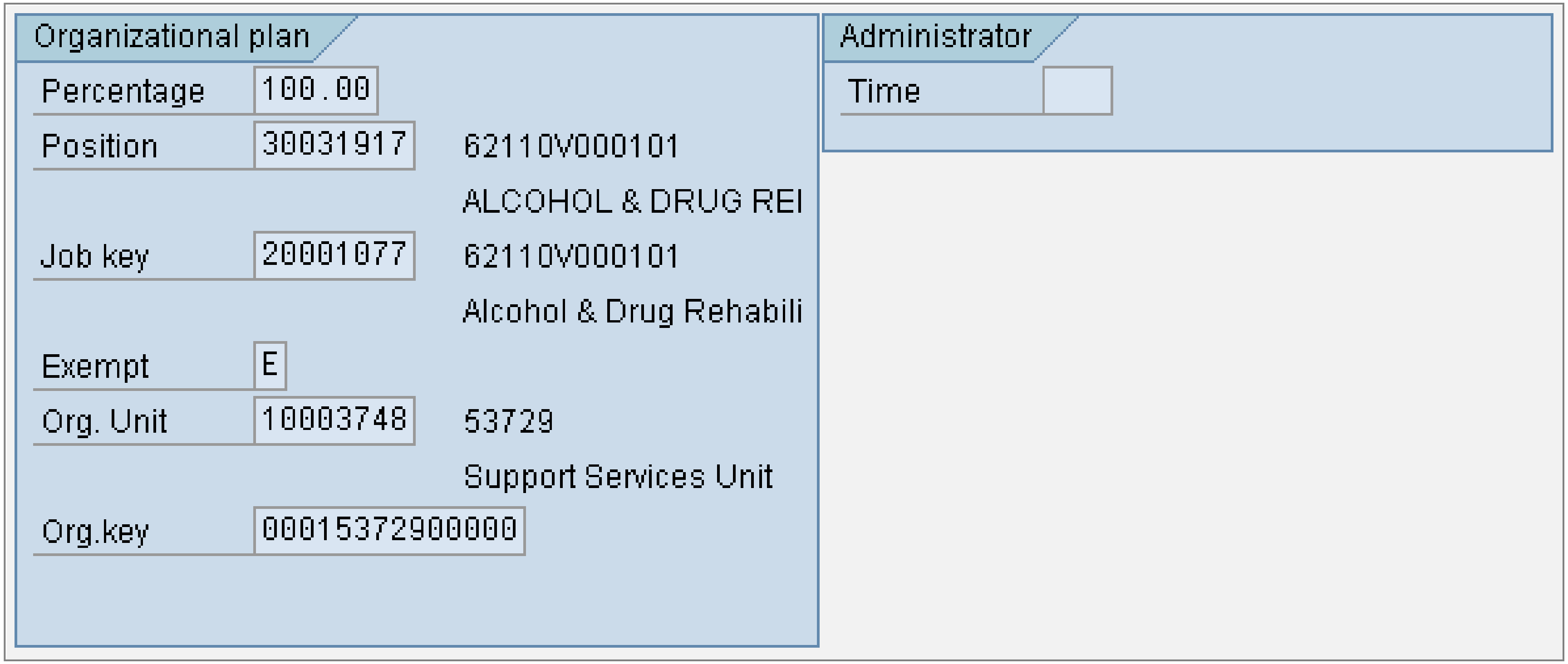
Payroll Area describes the pay frequency and payroll cycle for each employee.



Personnel structure

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

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



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

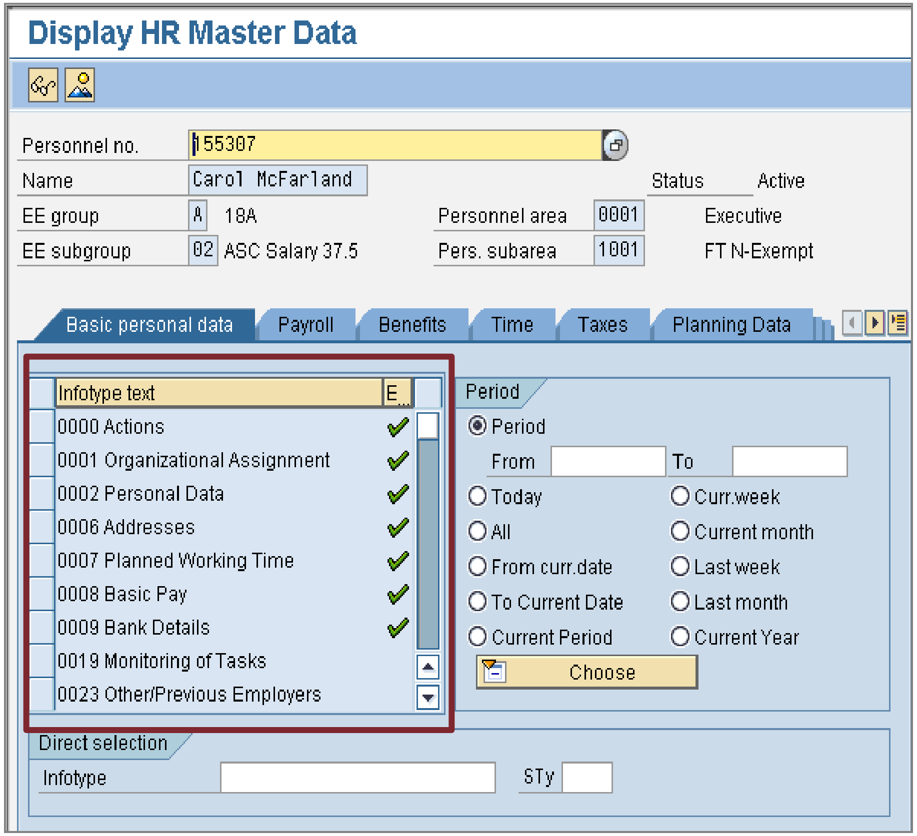
Actions

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

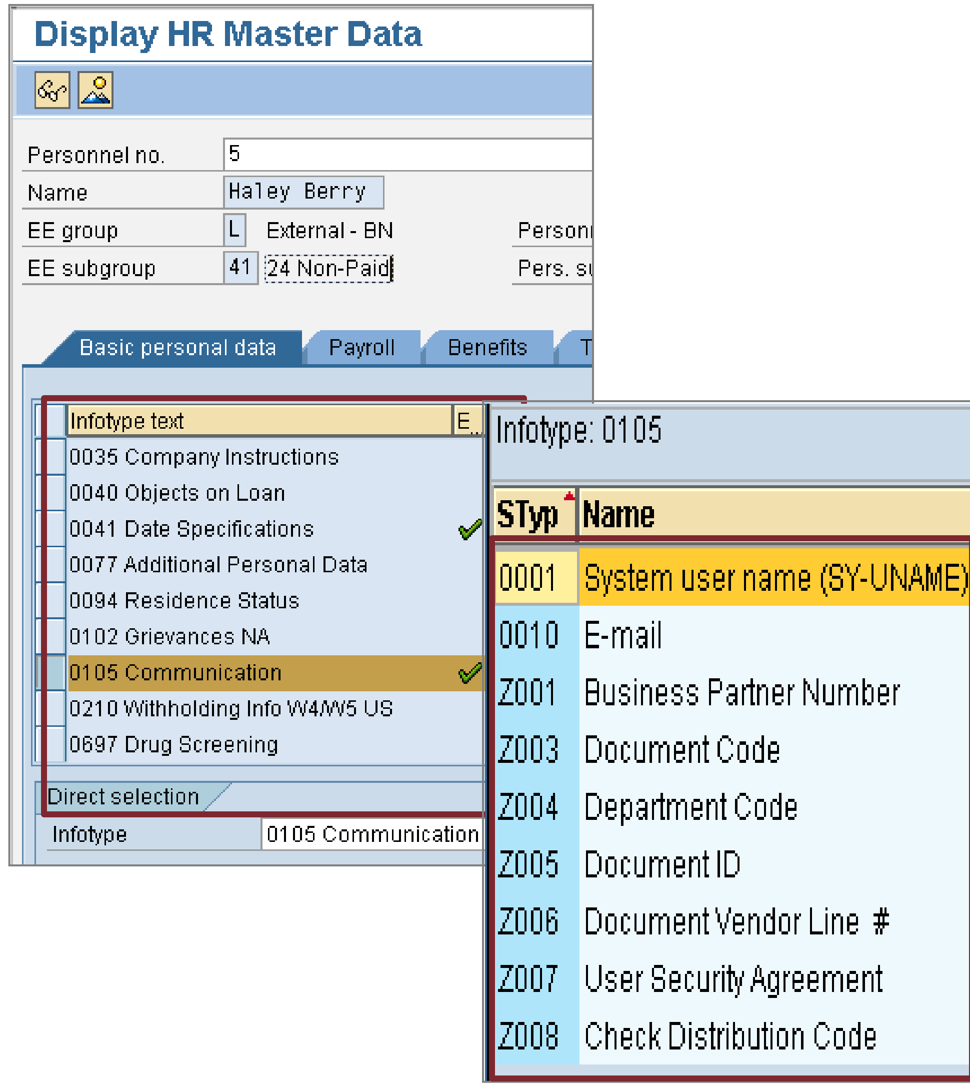


Manual Personnel Records

Subtypes are an expansion of an infotype.

For example:

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



Infotype Definitions

- **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.

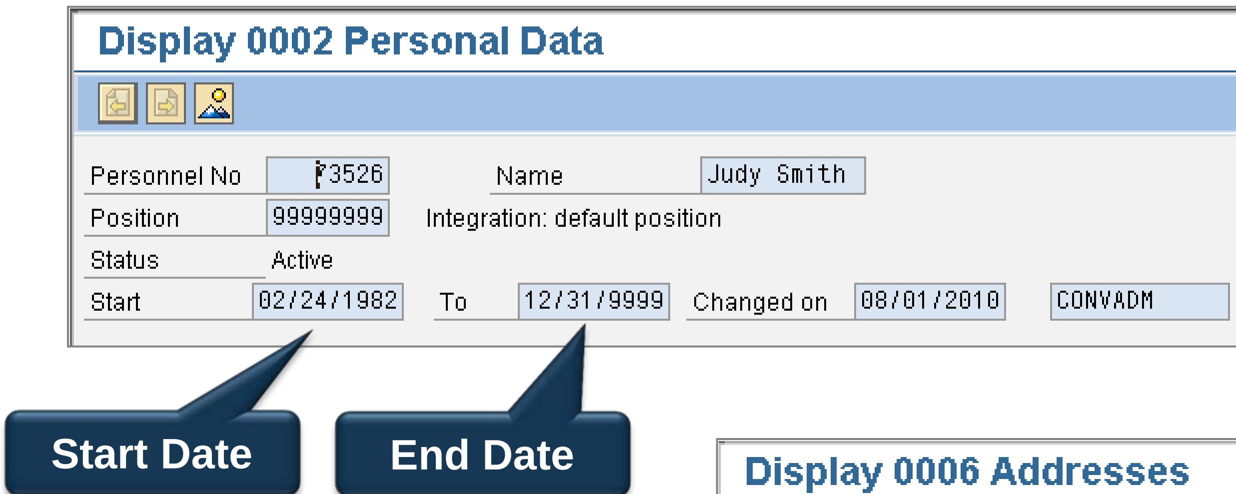
Dates

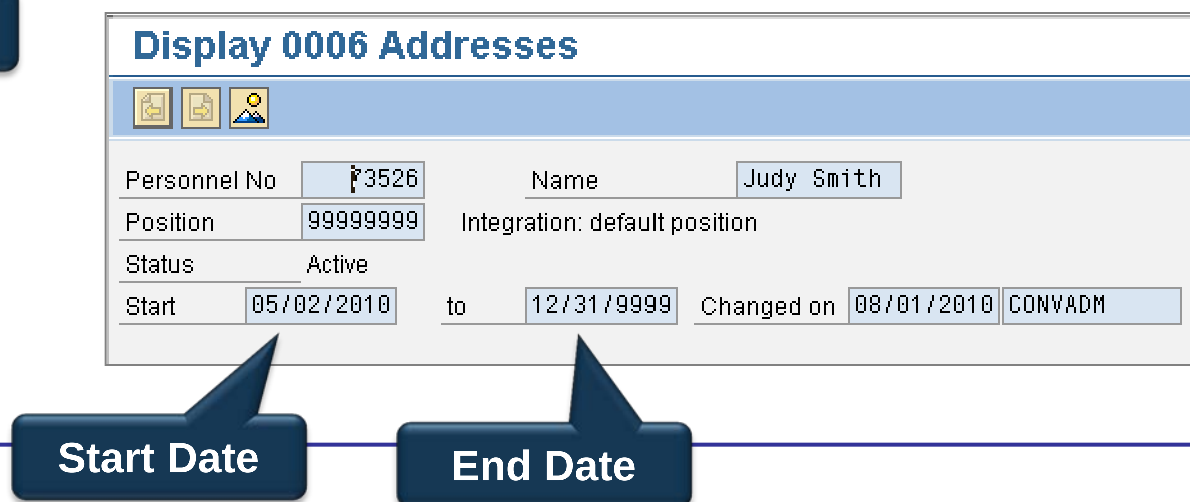
Every action and IT in KHRIS must have a beginning (effective) and ending date.

- 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

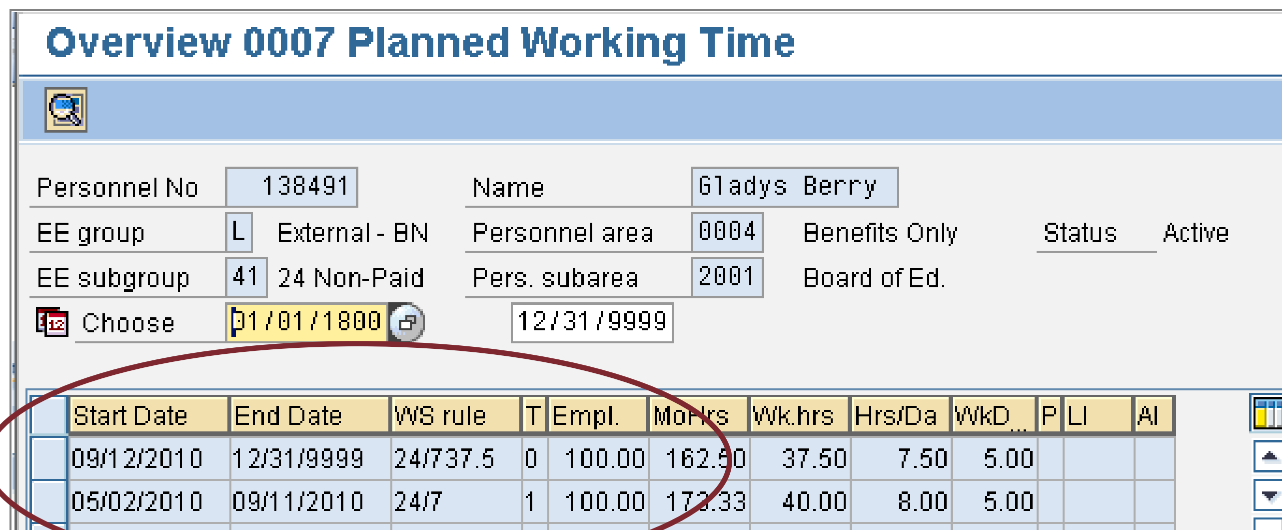
Validity Periods are the start and end dates that define the life span of an infotype.





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

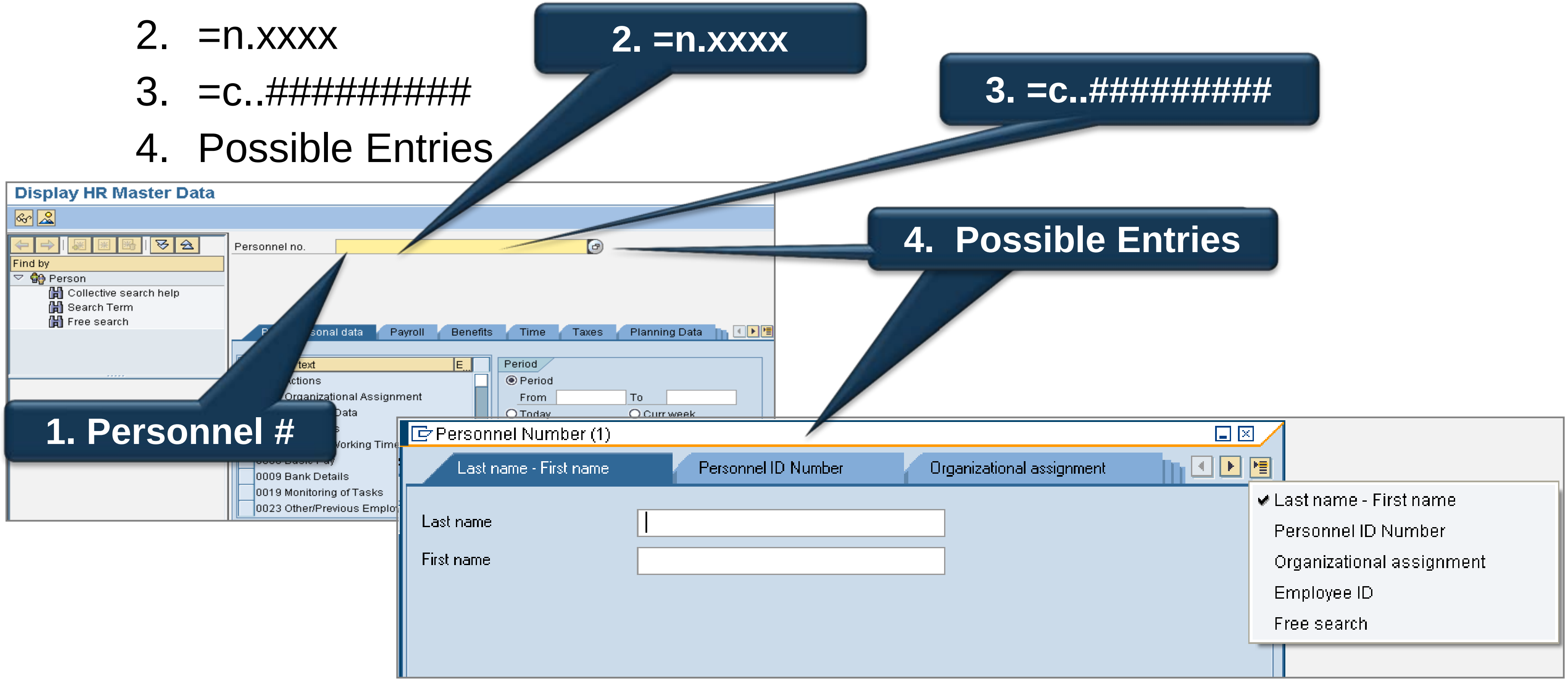
Start Date	End Date	WS rule	T	Empl.	MoHrs	Wk.hrs	Hrs/Da	WkD...	P	LI	AI
09/12/2010	12/31/9999	24/737.5	0	100.00	162.50	37.50	7.50	5.00			
05/02/2010	09/11/2010	24/7	1	100.00	173.33	40.00	8.00	5.00			

Finding an Employee

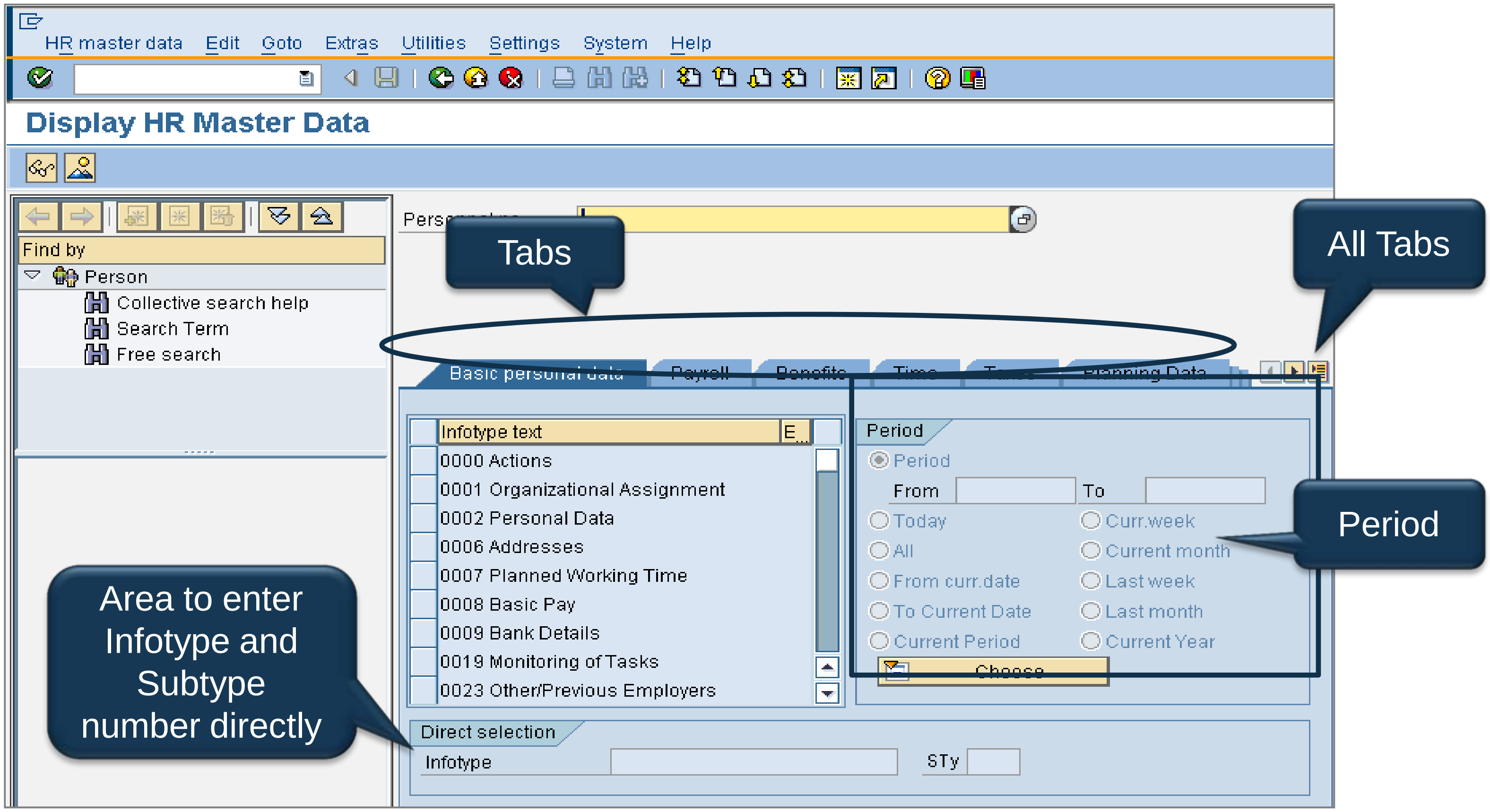
Before you can display employee data, you must identify the employee that you want to view.

Use one of the following methods:

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



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



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.

Knowledge Check

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

Lesson 1 Review

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

Course Map

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Lesson 5: Reports

Wrap Up

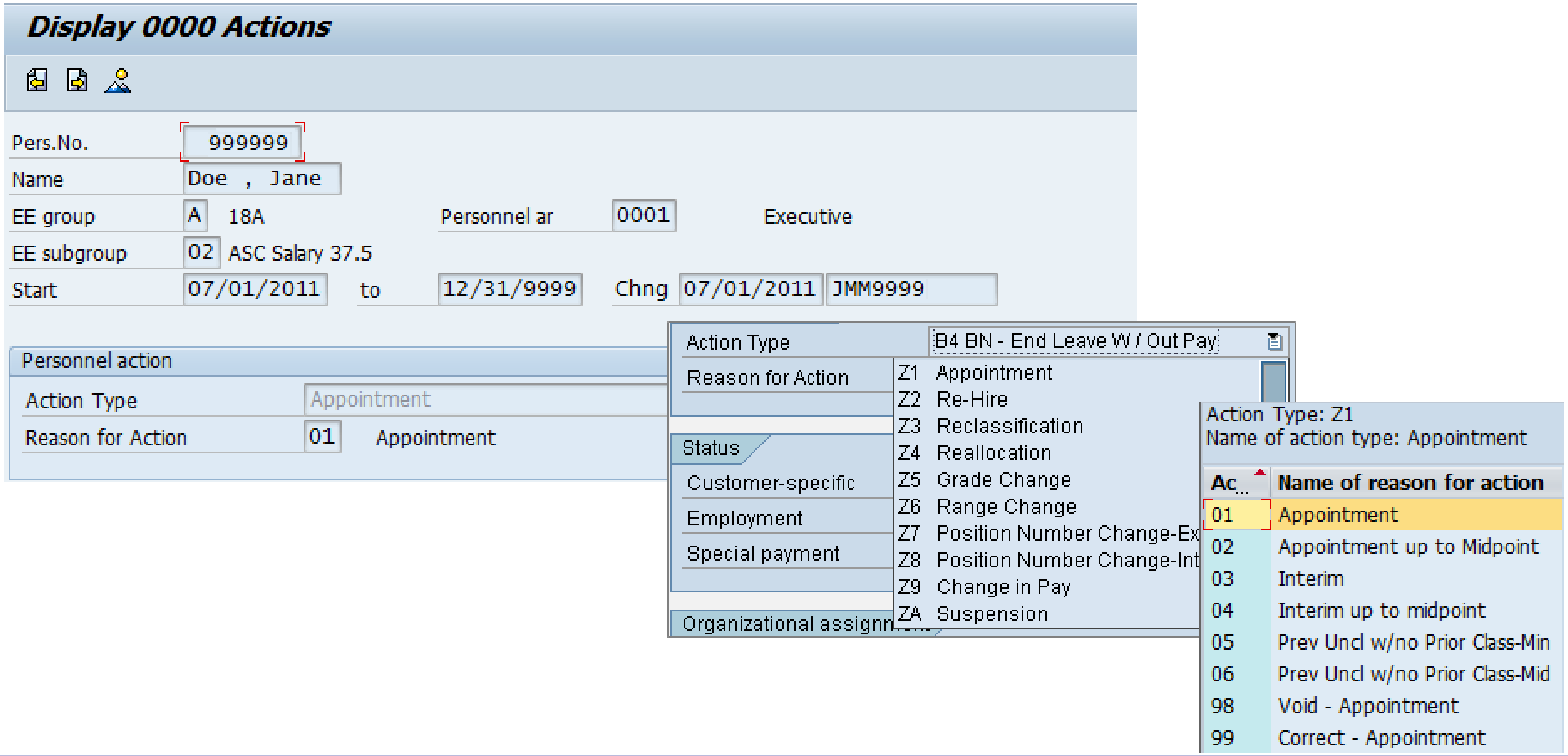
Lesson 2 Objectives

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



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

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:

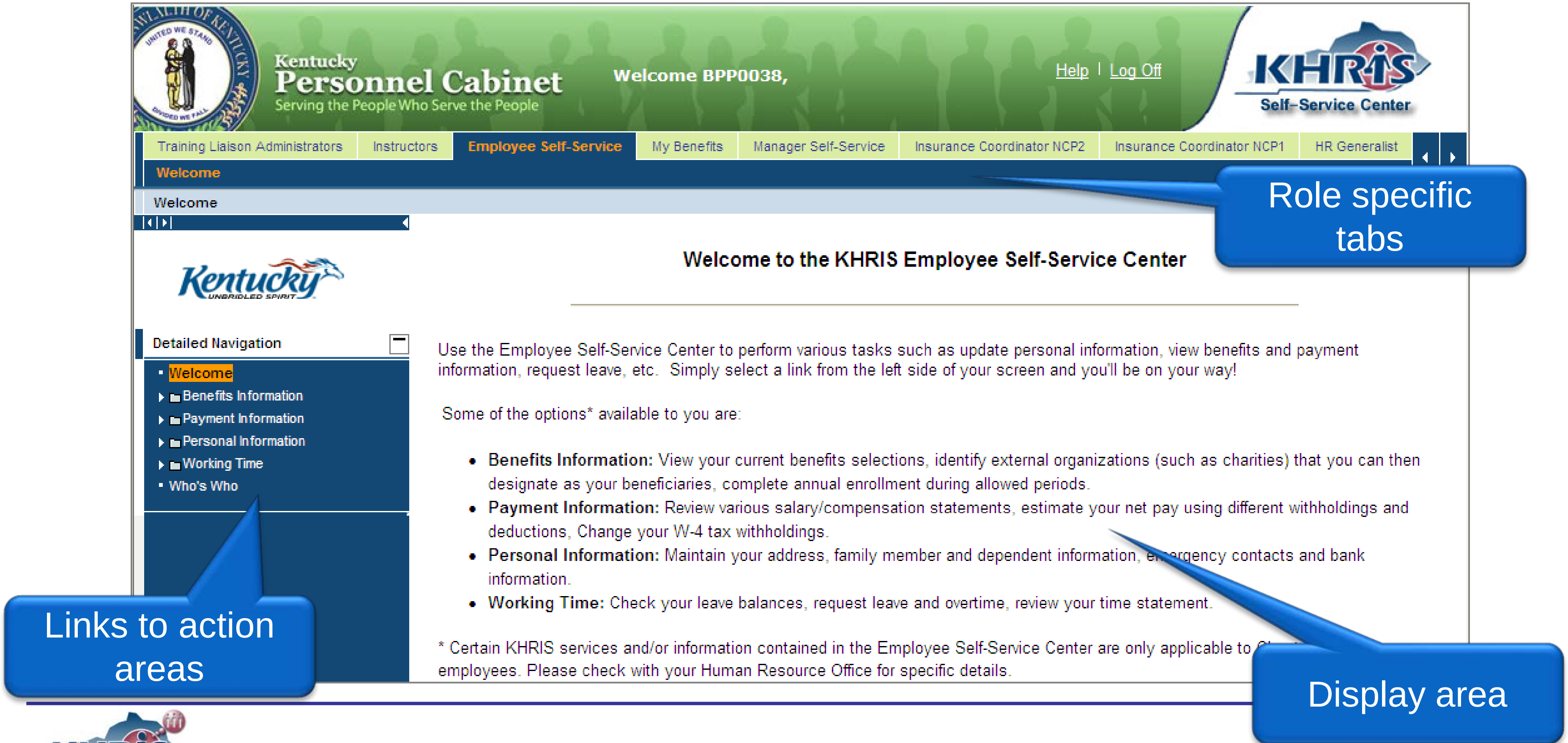
- I understand in order to obtain access to Personnel Cabinet systems, I have been given a User ID and password. I am solely responsible for all information obtained through this computer system access using only my ID and password. I am obligated to keep all Access Codes, including my User ID, password, 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.

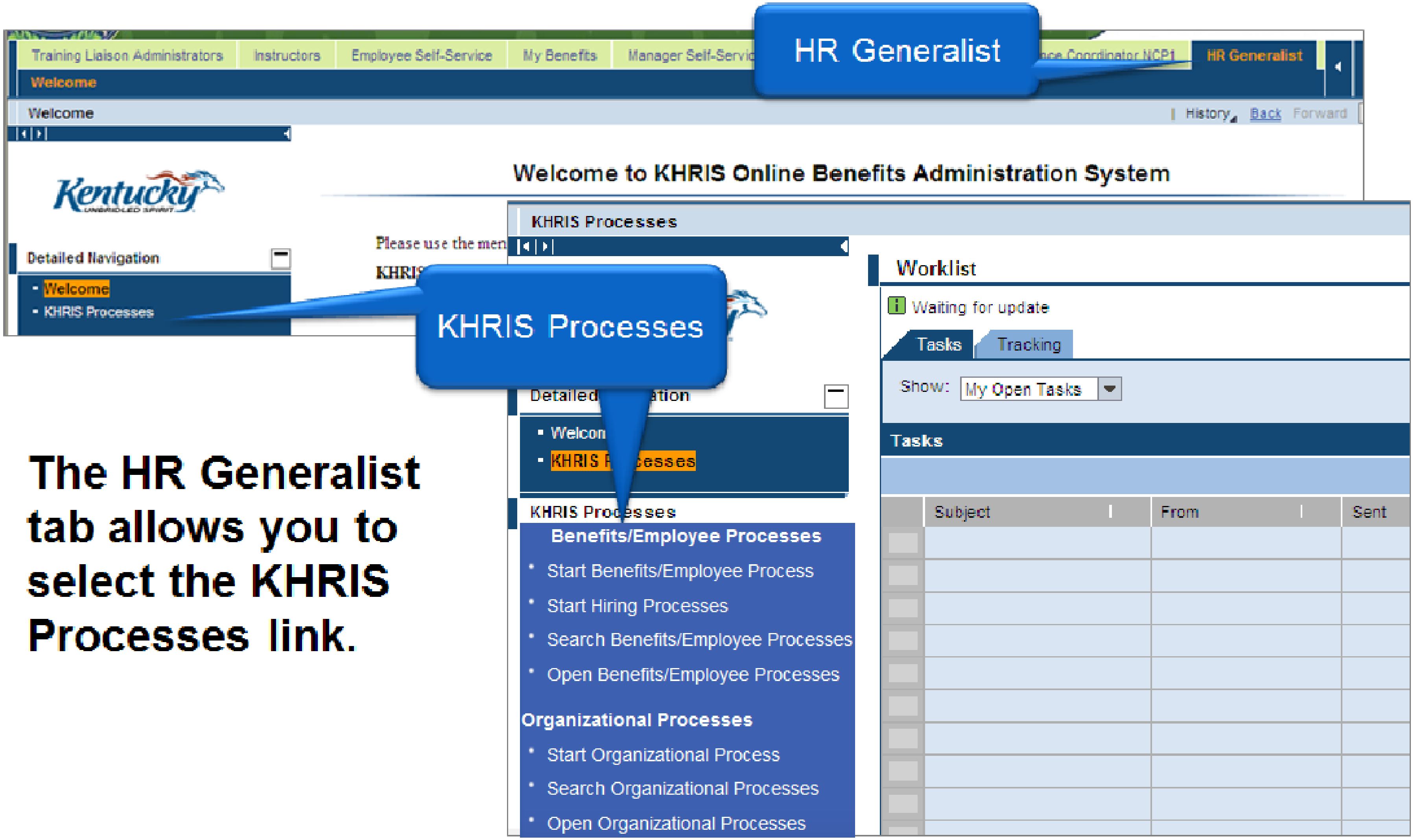
I understand I shall notify my Agency Security Contact of any actual or suspected data security breach as soon as possible. The Agency Security Contact is responsible for immediately notifying the Personnel Cabinet. I further understand and agree nothing contained in this Agreement shall be construed 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.



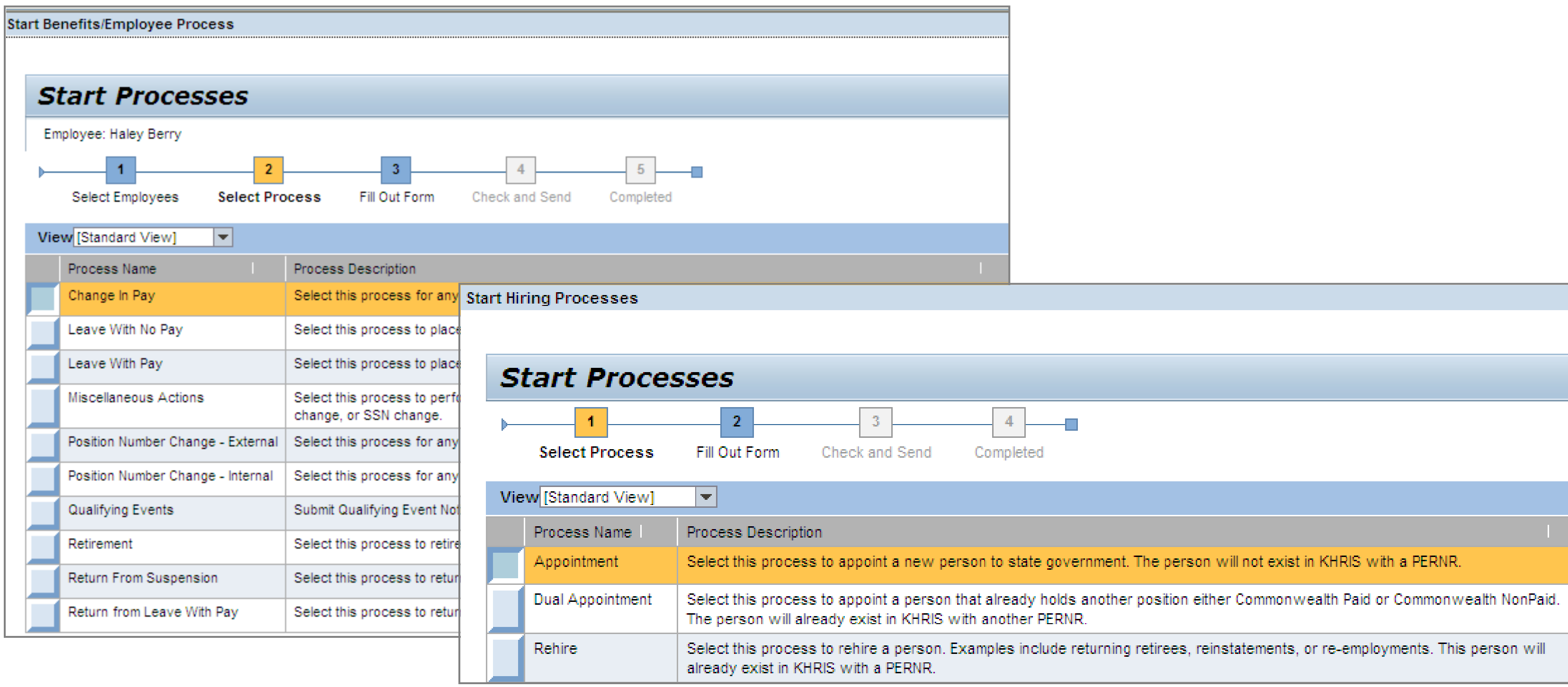


The HR Generalist tab allows you to select the KHRIS Processes link.

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



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

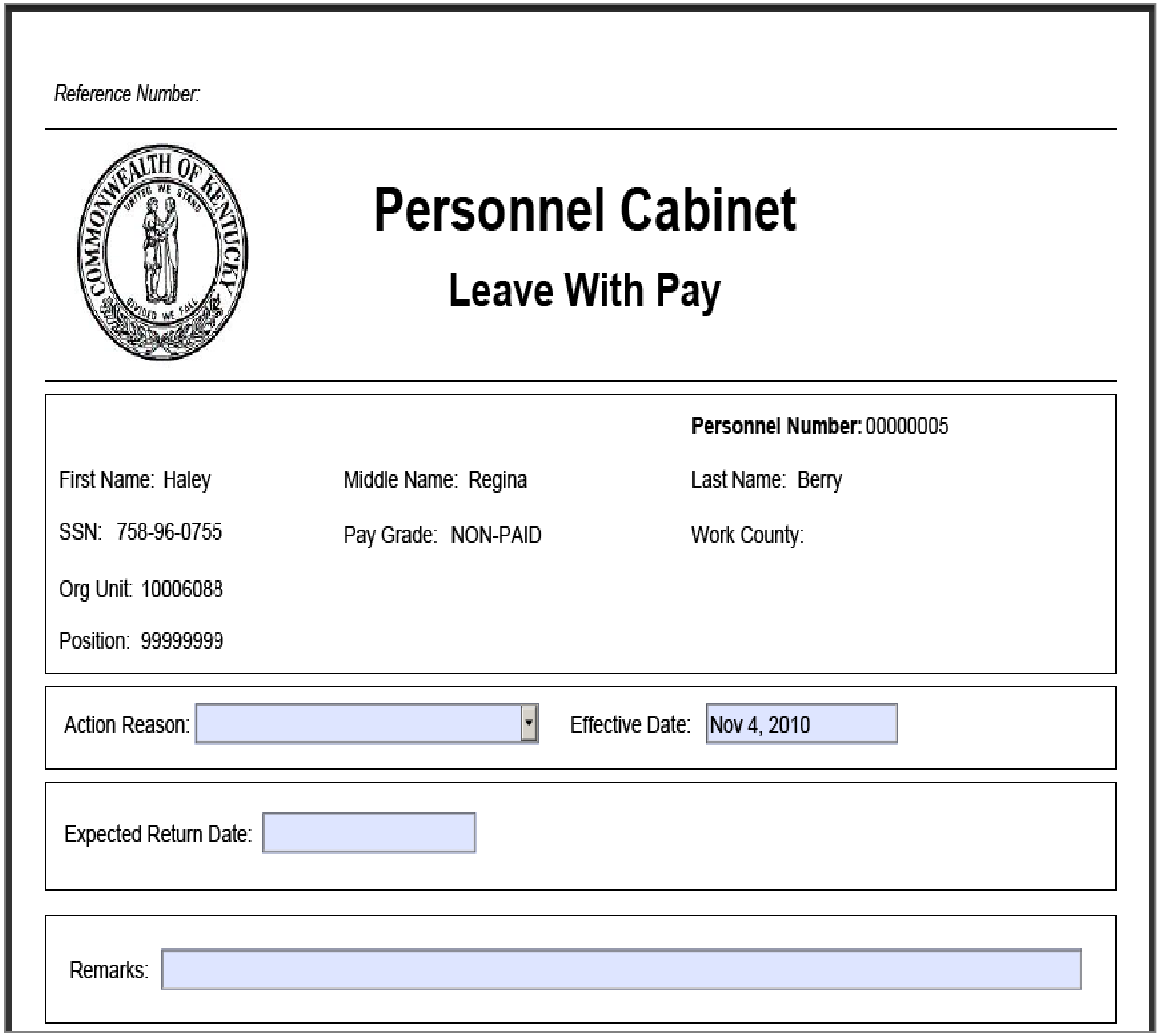
Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

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: | Effective Date: Nov 4, 2010

Expected Return Date:

Remarks:

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: 758-96-0755

Pay|Grade: NON-PAID

Work County:

Org Unit: 10006088

Position: 99999999

Action Reason:

Effective Date: Nov 4, 2010

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

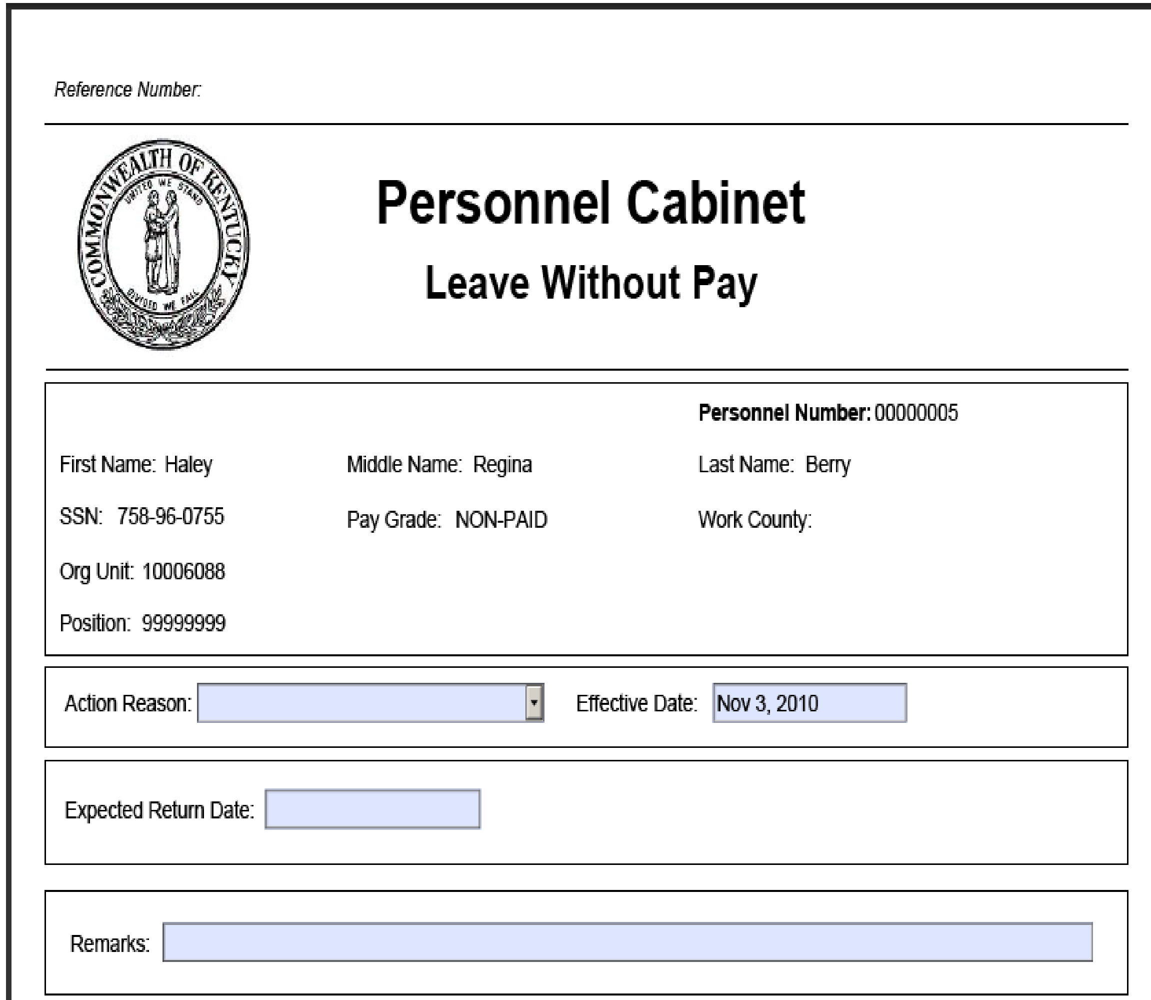
Return to Position: 99999999

Current Value	Proposed Value
Work Schedule: 40HR24/7f	Work Schedule:
Pay Amount: 80.000	Pay Amount: 800.00
Shift Premium Ind:	Shift Premium Ind:
Overtime Status:	Overtime Status:

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: | Effective Date: Nov 3, 2010

Expected Return Date:

Remarks:

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: 758-96-0755 Pay Grade: NON-PAID Work County:

Org Unit: 10006088

Position: 99999999

Action Reason: Effective Date: Nov 4, 2010

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

Return to Position: 99999999

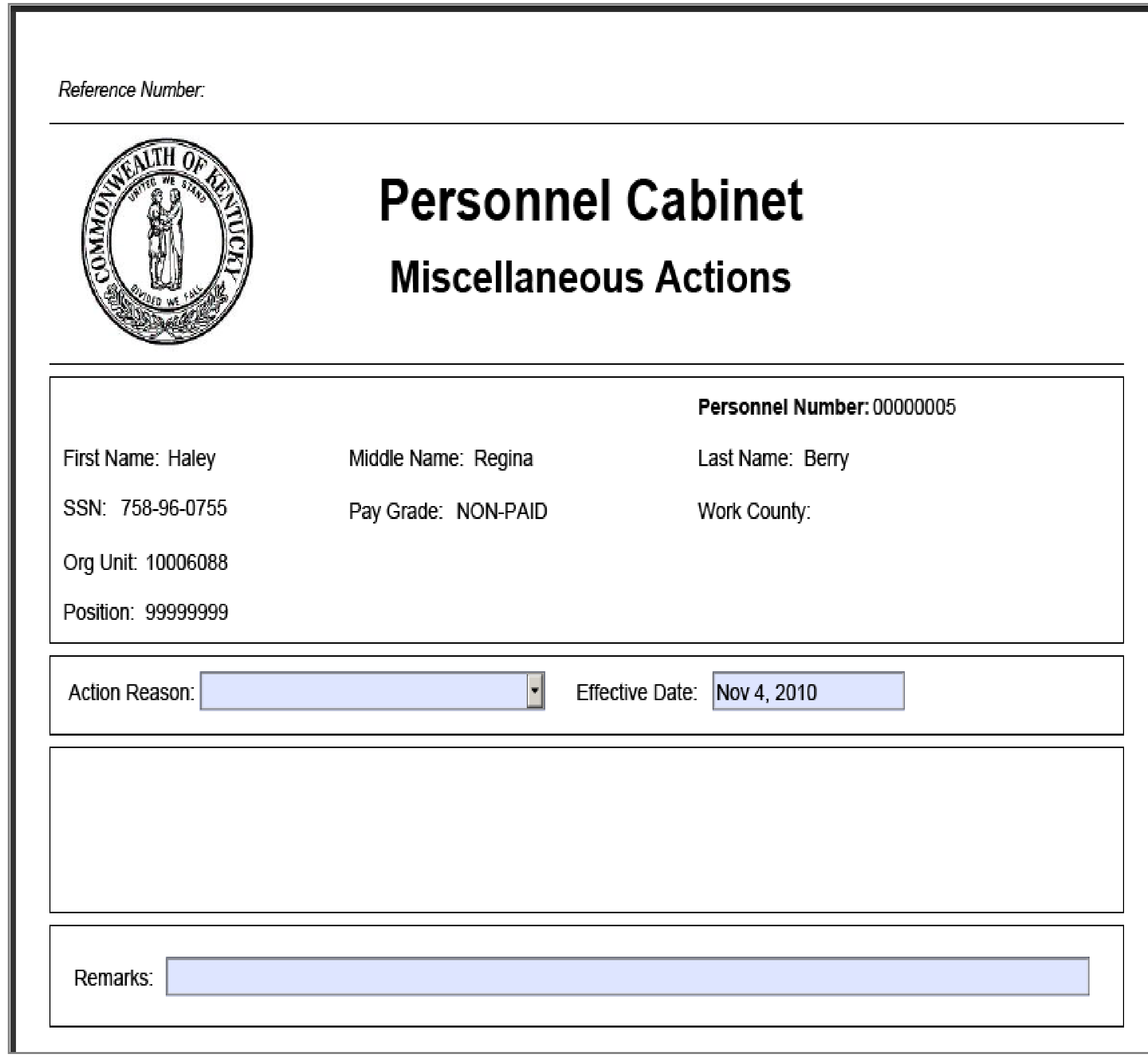
Current Value	Proposed Value
Work Schedule: 40HR24/7f	Work Schedule:
Pay Amount: 80.000	Pay Amount: 800.00
Shift Premium Ind:	Shift Premium Ind:
Overtime Status:	Overtime Status:

Work Tax Area:

Remarks:

Miscellaneous Actions

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:

COMMONWEALTH OF KENTUCKY
UNITED WE STAND DIVIDED WE FALL

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:
Effective Date: Nov 4, 2010

Remarks:

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

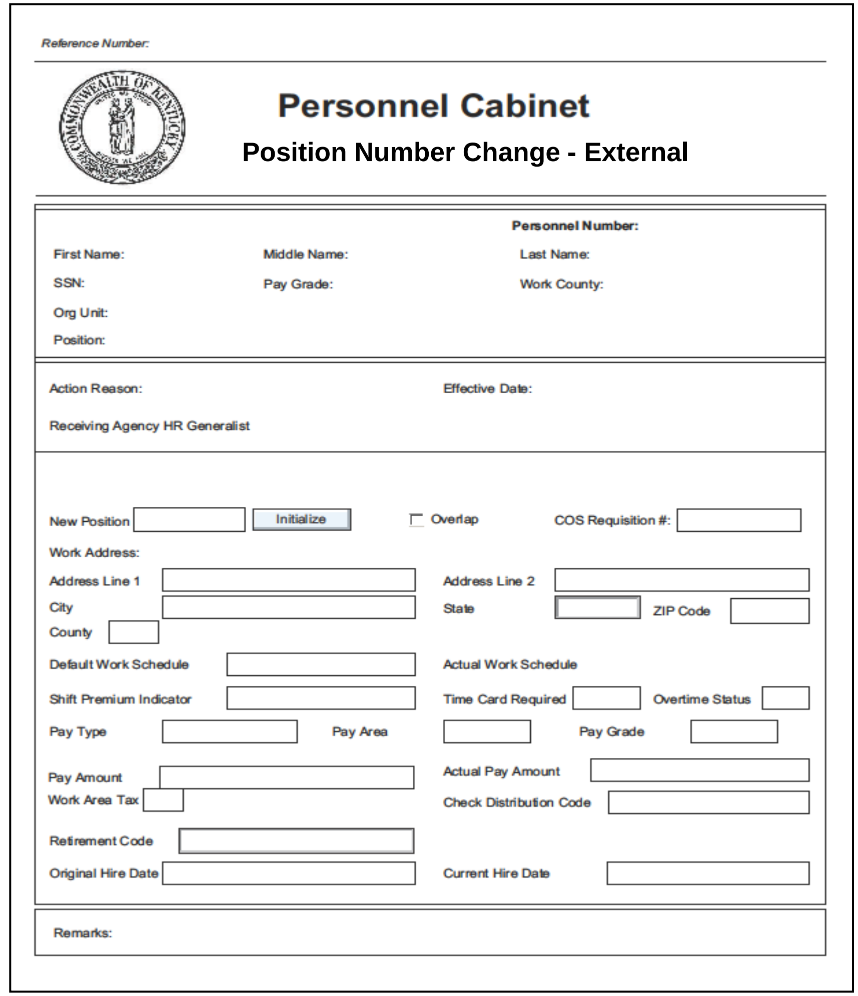
Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

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

Personnel Number:

First Name: Middle Name: Last Name:

SSN: Pay Grade: Work County:

Org Unit:

Position:

Action Reason: Effective Date:

Receiving Agency HR Generalist

New Position [ ] Initialize [ ] Overlap COS Requisition #: [ ]

Work Address:

Address Line 1 [ ] Address Line 2 [ ]

City [ ] State [ ] ZIP Code [ ]

County [ ]

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:

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

Reference Number:

Personnel Cabinet

Position Number Change - Internal

Personnel Number:

First Name: Middle Name: Last Name:

SSN: Pay Grade: Work County:

Org Unit:

Position:

Action Reason: Effective Date:

New Position Initialize Overlap COS Requisition #:

Work Address:

Address Line 1 Address Line 2

City State ZIP Code

County

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:

KHRIS
Kentucky Human Resource Information System
Connecting the Commonwealth

Exercise 2.3: Position Number Change - Internal

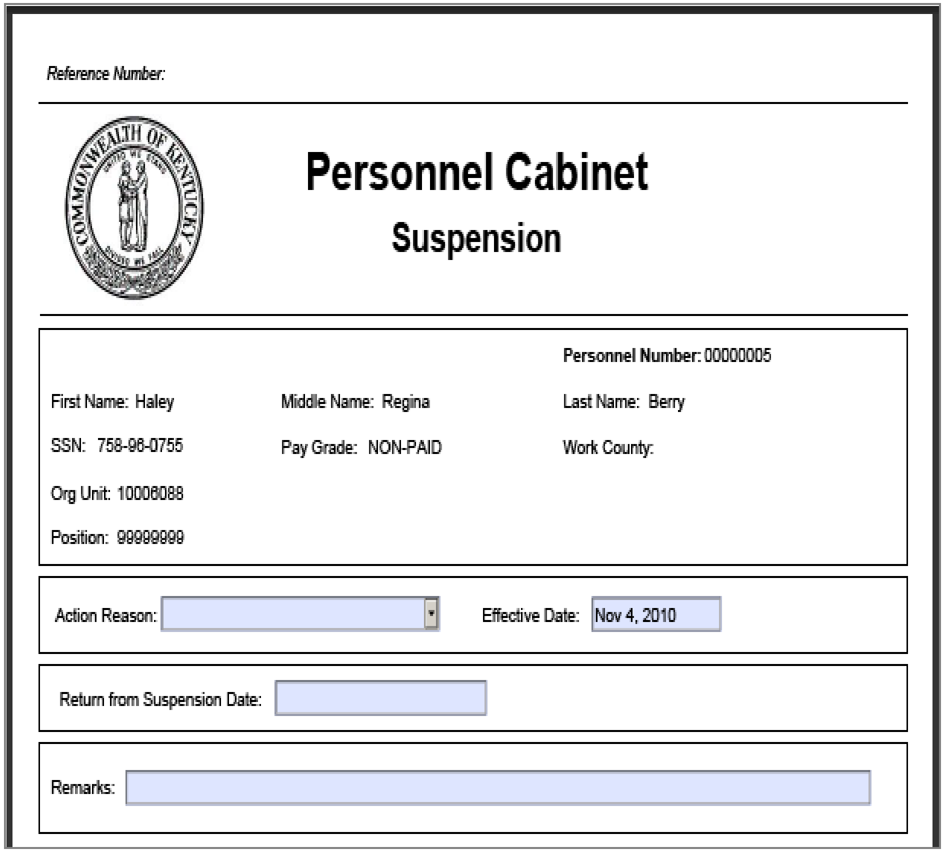
Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

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:

COMMONWEALTH OF KENTUCKY

Personnel Cabinet

Suspension

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 4, 2010

Return from Suspension Date:

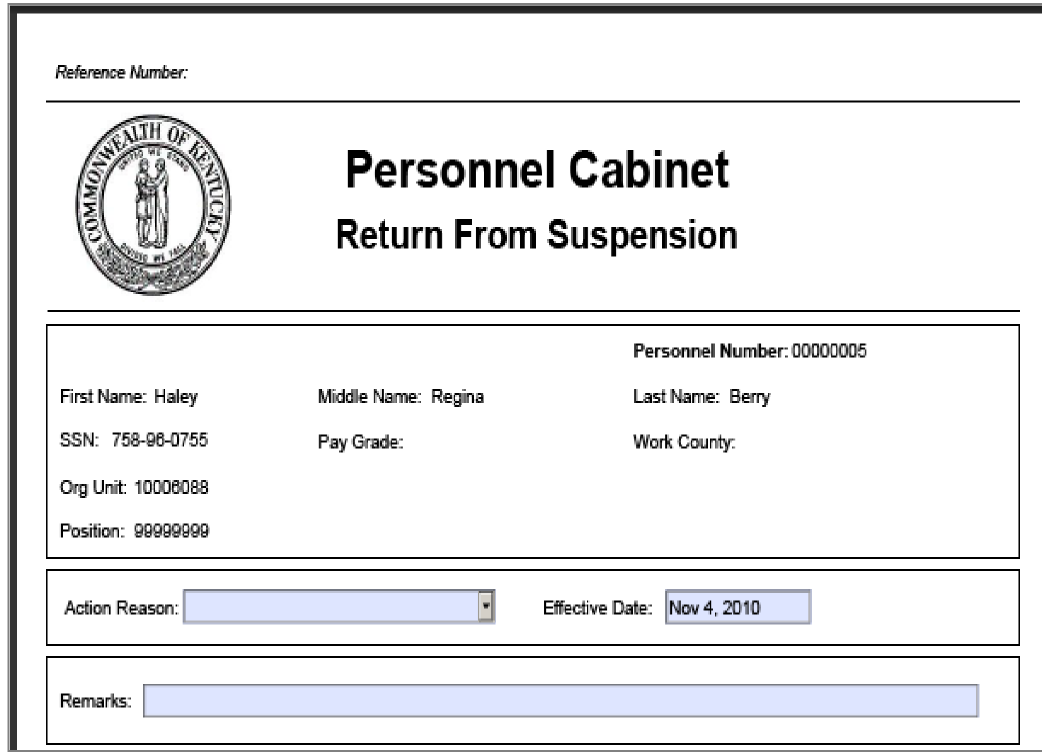
Remarks:

KHRIS

Kentucky Human Resource Information System

Connecting the Commonwealth

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: 758-96-0755	Pay Grade:	Work County:
Org Unit: 10006088		
Position: 99999999		

Action Reason: Effective Date: Nov 4, 2010

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: 10006088

Position: 99999999

Action Reason:
Effective Date: Nov 4, 2010

Address Line 1	001001 MAIN STREET	Address Line 2	
City	Wilmore	State	KY Zip Code 40390
County	057		

Payroll Data:

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

Objects on Loan:

Delimit	Objects

Date Specifications:

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

Remarks:

Separation

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: 10006088

Position: 99999999

Action Reason: | Effective Date: Nov 4, 2010

Address Line 1: 001001 MAIN STREET | Address Line 2:

City: Wilmore | State: KY | Zip Code: 40390

County: 057

Payroll Data:

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

Objects on Loan:

Delimit	Objects

Date Specifications:

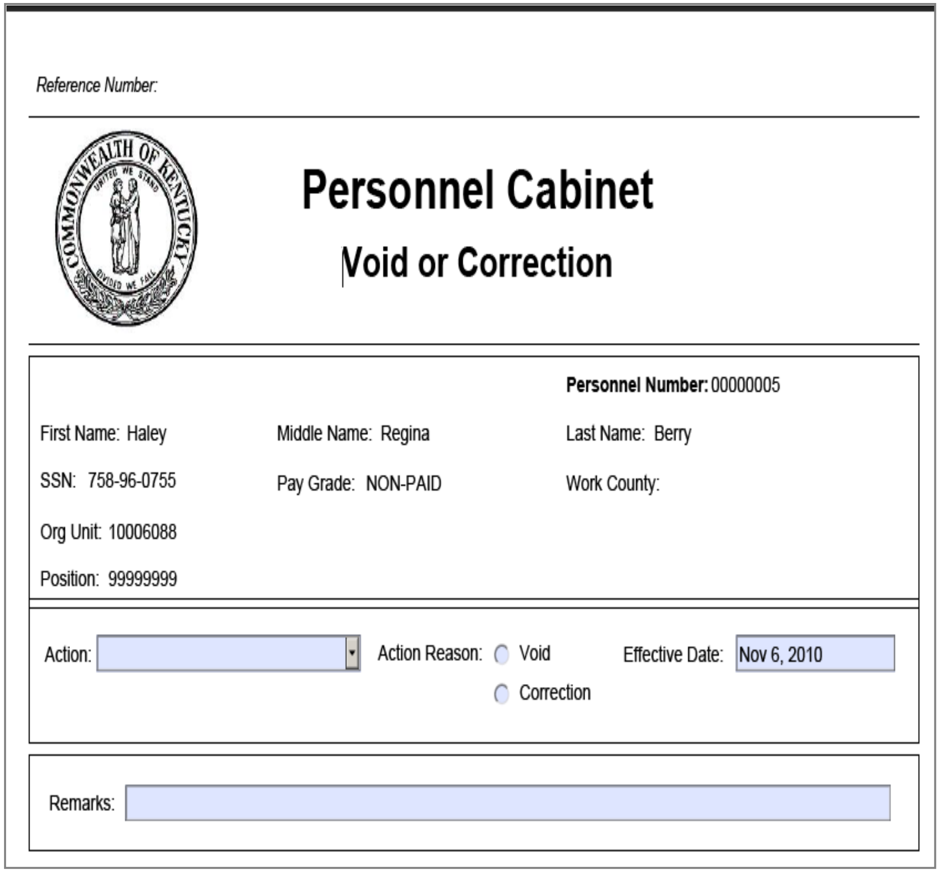
Original Hire Date: Aug 15, 1977 | Current Hire Date: Aug 15, 1977

Remarks:

Void or Correction

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: Berry

SSN: 758-96-0755
Pay Grade: NON-PAID
Work County:

Org Unit: 10006088

Position: 99999999

Action:
Action Reason: Void / Correction
Effective Date: Nov 6, 2010

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.

Void or Correction

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

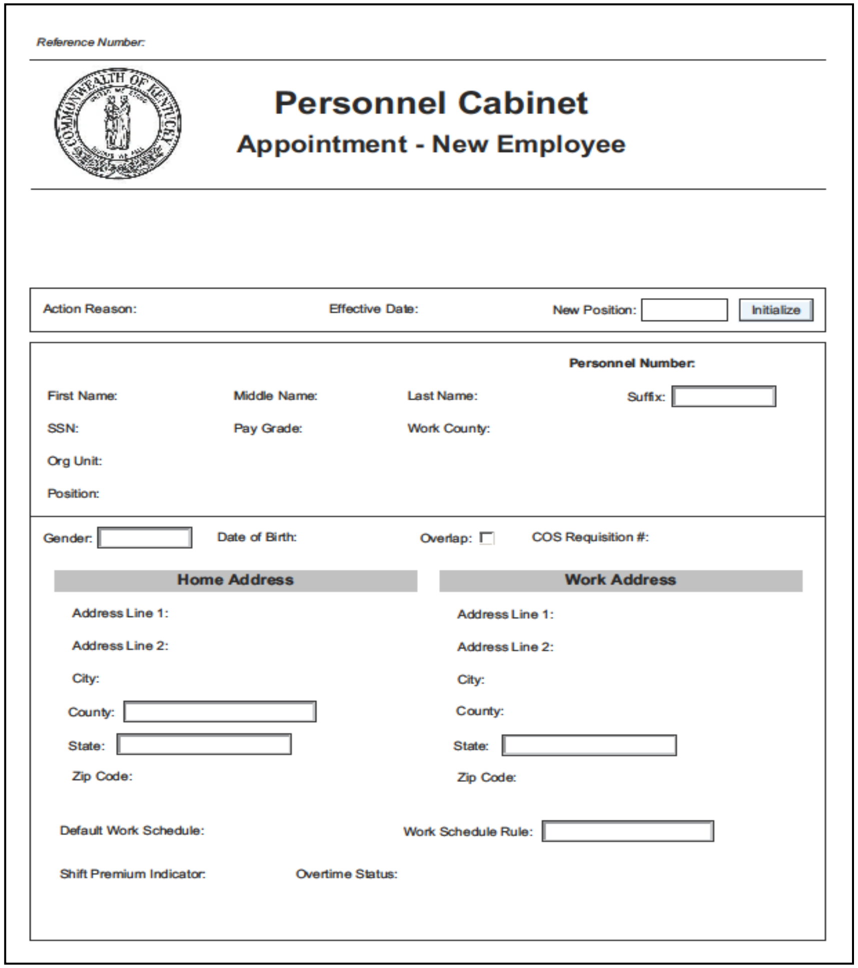
- **Upon approval, the action does not make the necessary changes; instead, the form actually directs the consultants in the Personnel Administration Branch to make the changes.**
  - Since the form is simply directions for what changes need to be made, the remarks field on this form is required. Explain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

ACTION TYPE	REASONS FOR CORRECTION	REASONS FOR VOID
Appointment	▪ Wrong action reason ▪ Wrong effective date ▪ Wrong position number ▪ Wrong salary	▪ Employee is a no show ▪ Employee later declines offer of employment
Re-Hire	▪ Wrong action reason ▪ Wrong position number ▪ Wrong salary	▪ Employee is a no show ▪ Employee later declines offer of employment ▪ Wrong effective date
Reclassification	▪ Wrong effective date ▪ Wrong salary	▪ Action processed in error ▪ Action processed in the incorrect order for calculating salary
Reallocation	▪ Wrong effective date ▪ Wrong salary	▪ Action processed in error ▪ Action processed in the incorrect order for calculating salary
Position Number Change (Ext/Int)	▪ Wrong effective date ▪ Wrong position number ▪ Wrong salary	▪ Action processed in error ▪ Action processed in the incorrect order for calculating salary
Change in Pay	▪ Wrong effective date ▪ Wrong salary	▪ 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	▪ Incorrect remarks ▪ Wrong effective date	▪ Action was overturned or adjusted by Board/Court order ▪ Appointing Authority decided to rescind the disciplinary action
Leave without Pay/Return	▪ To correct remarks ▪ Wrong effective date	▪ Action was overturned or adjusted by Board/Court order ▪ Timesheet and leave/return action(s) disagree
Leave with Pay/Return	▪ To correct remarks ▪ Wrong effective date	▪ Action was overturned or adjusted by Board/Court order ▪ Appointing Authority decided to rescind the placement on leave
Separation	▪ To correct remarks ▪ Wrong action reason ▪ Wrong effective date	▪ 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	▪ To correct remarks ▪ Wrong action reason ▪ Wrong effective date	▪ 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: Initialize

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:	County:
State:	State:
Zip Code:	Zip Code:

Default Work Schedule: Work Schedule Rule:

Shift Premium Indicator: Overtime Status:

Exercise 2.4: Execute Appointment – New Employee

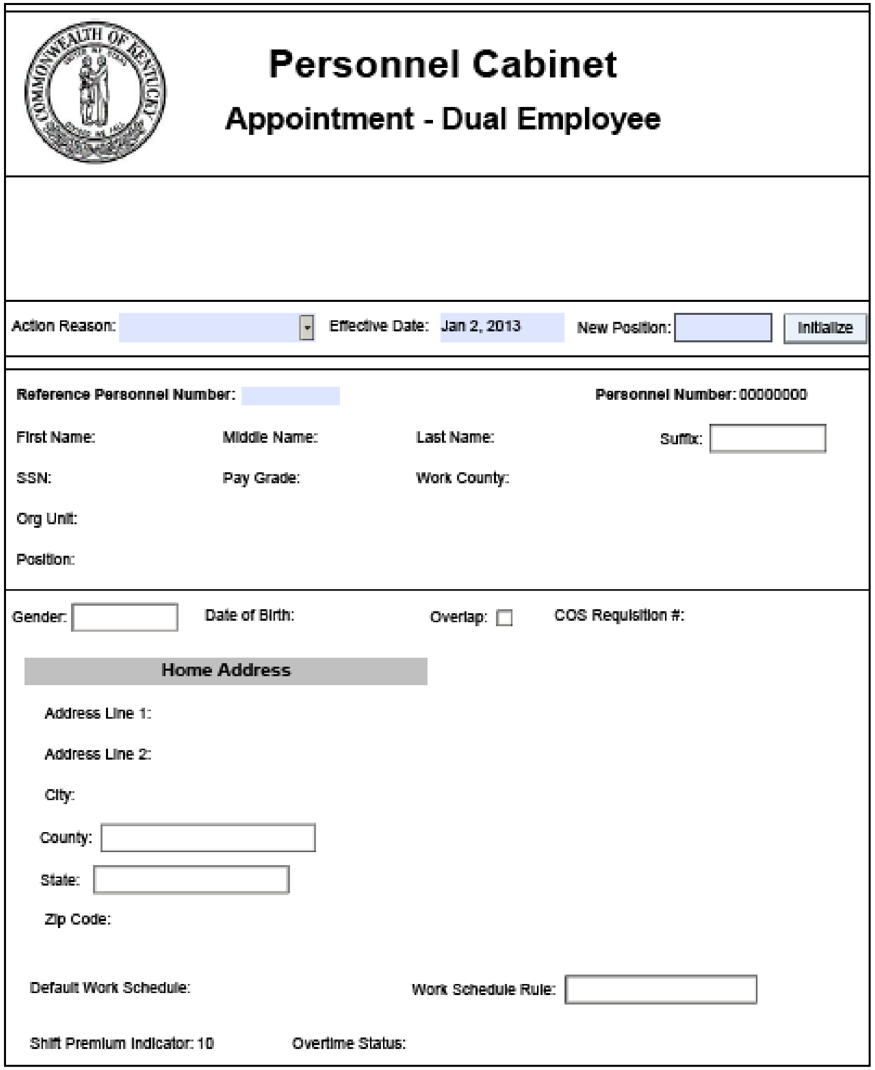
Observe as the instructor demonstrates the steps. You will then have the opportunity to complete the exercise on your own.

Purpose:

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

Dual Appointment

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: Effective Date: Jan 2, 2013 New Position: Initialize

Reference Personnel Number: Personnel Number: 00000000

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:

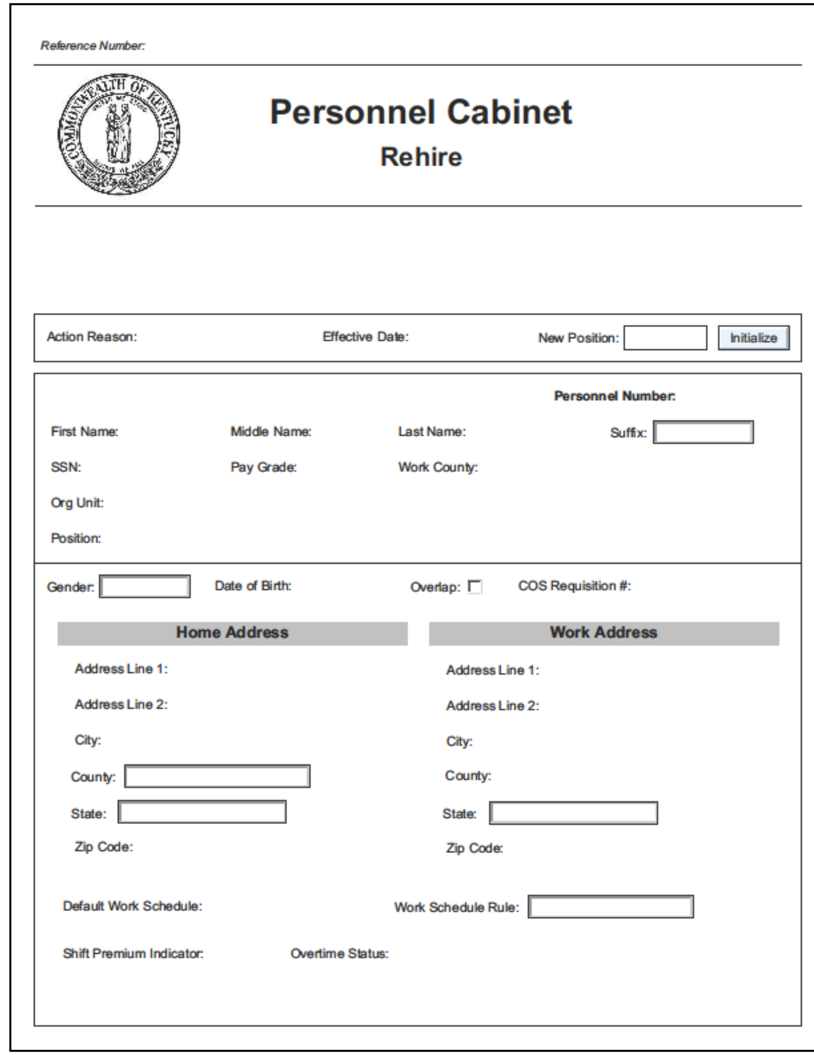
Zip Code:

Default Work Schedule: Work Schedule Rule:

Shift Premium Indicator: 10 Overtime Status:

Rehire

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: Initialize

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:	County:
State:	State:
Zip Code:	Zip Code:

Default Work Schedule: Work Schedule Rule:

Shift Premium Indicator: Overtime Status:

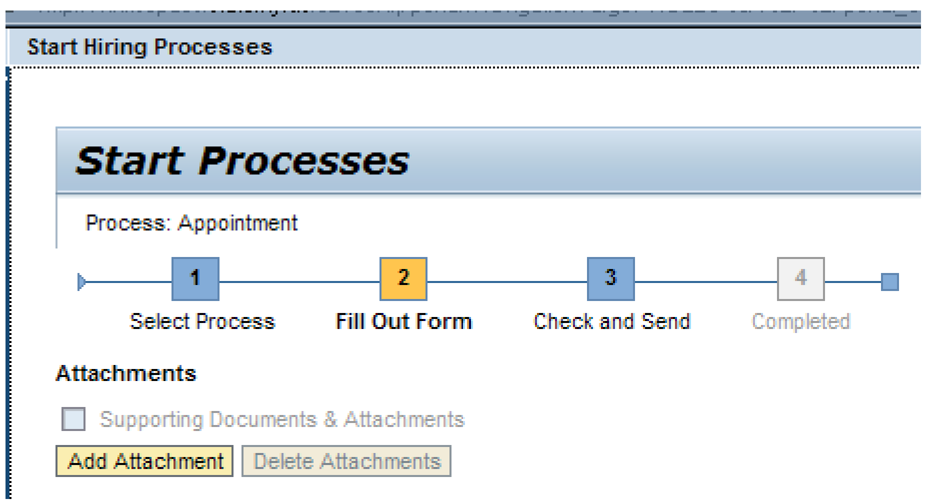
Exceptions to Rehire

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.

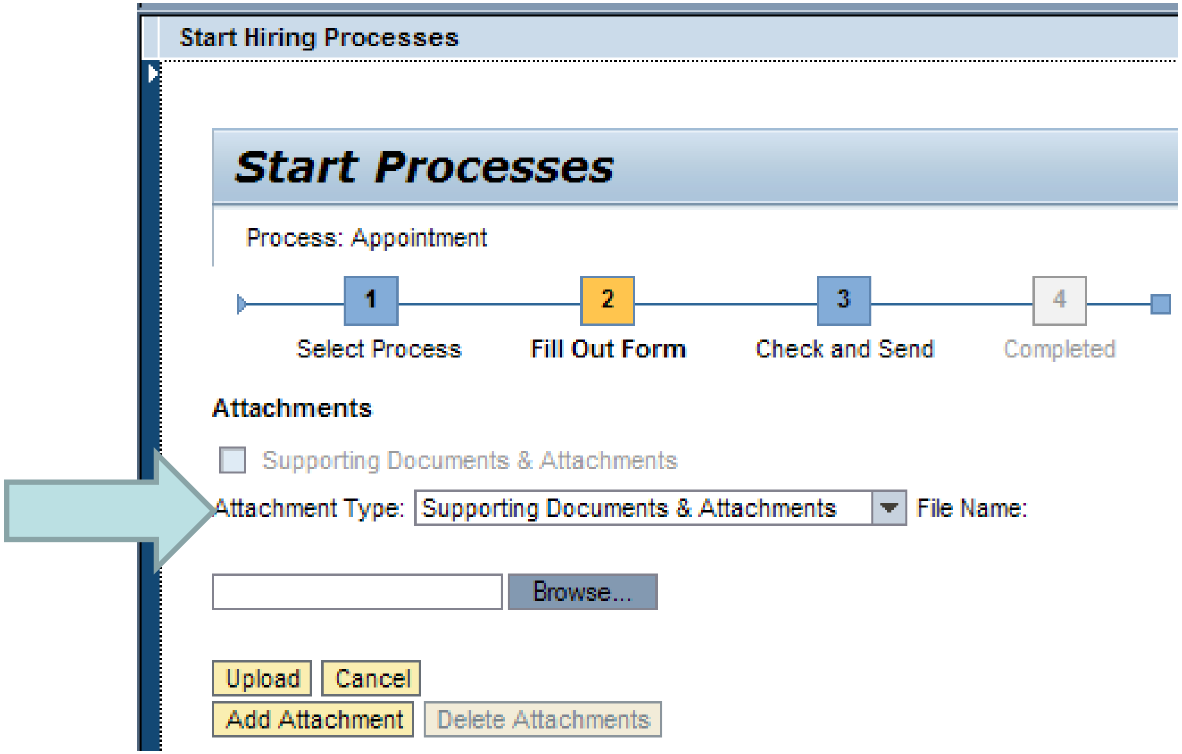
These actions will need to be processed as follows:

- 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

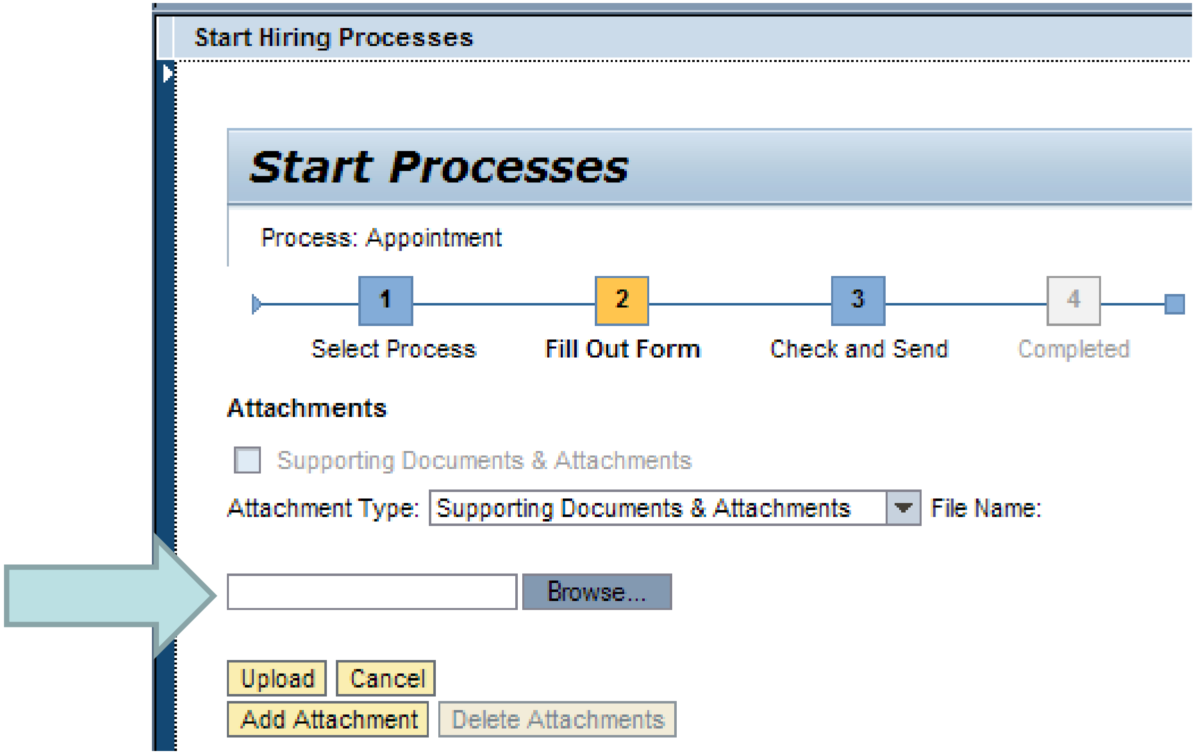
User should see attachment option at the top of the screen.



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

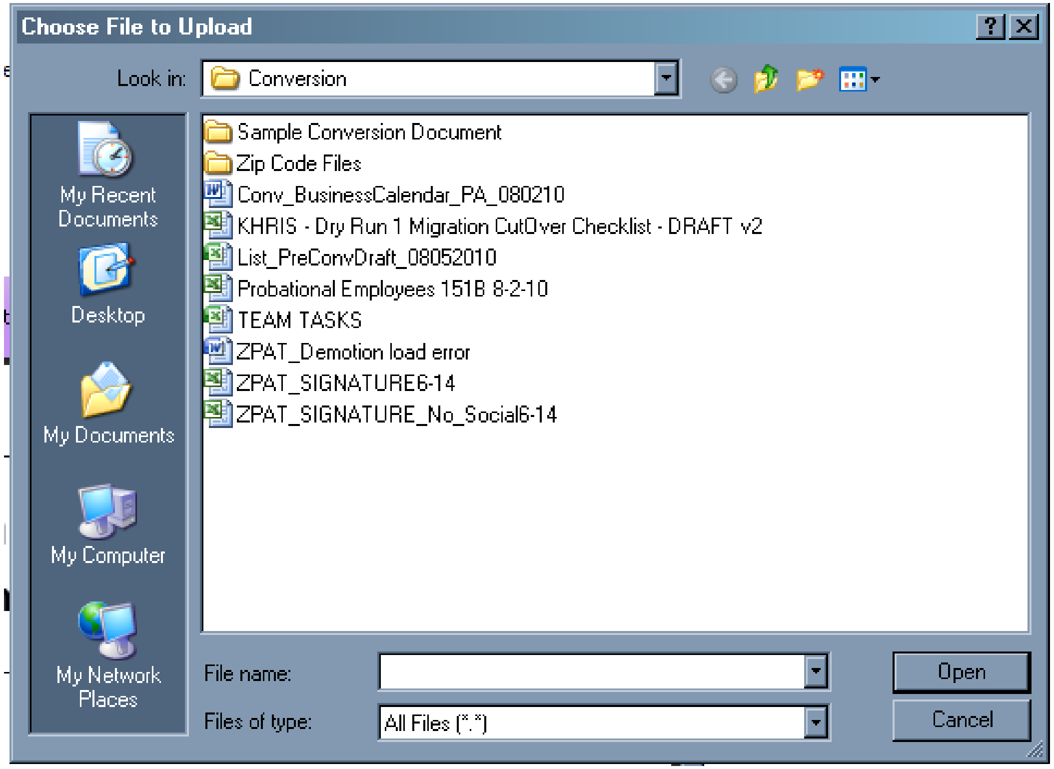


Click on “Browse” to search for the document on your computer.

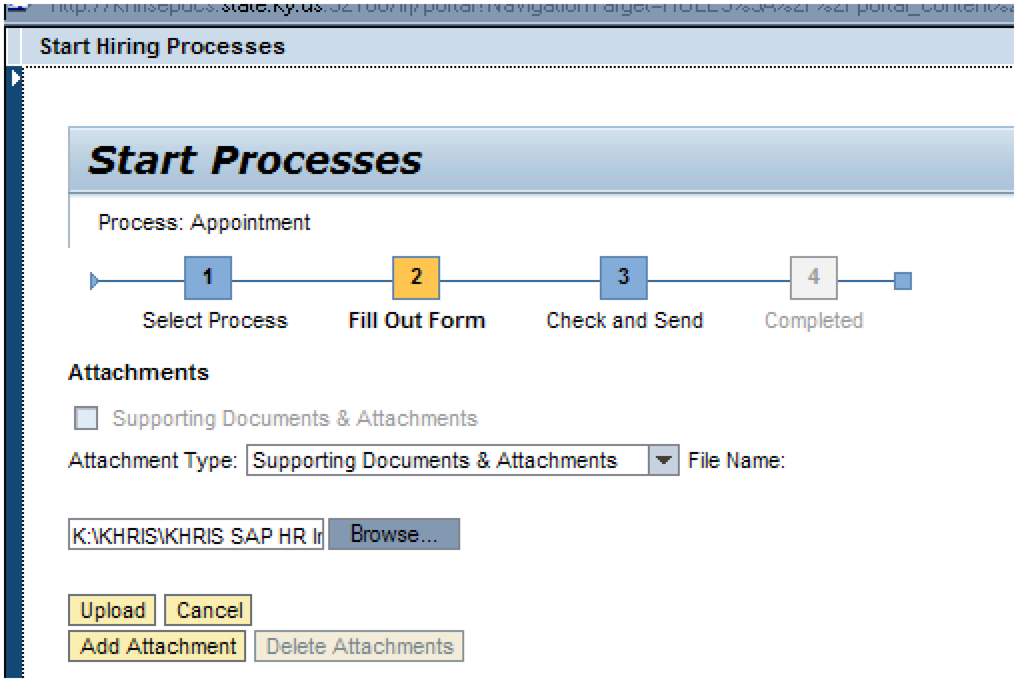


User will select the File to upload and click Open.

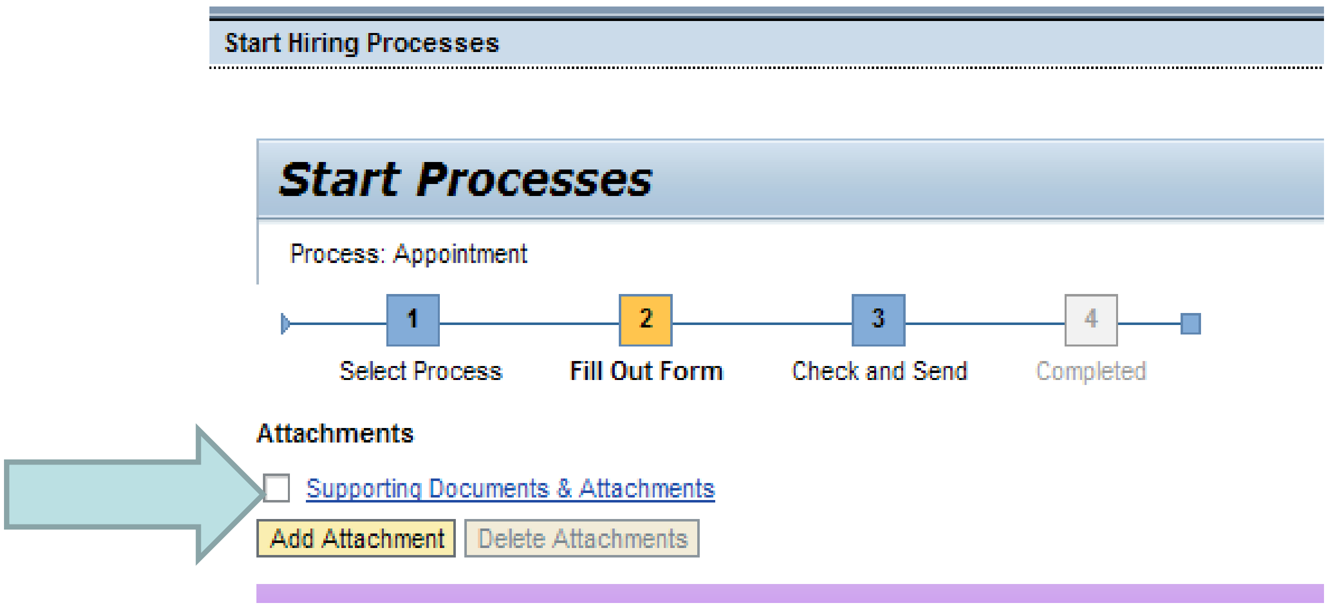
Document path will display on the screen and the user can select Upload.



User can continue same process to add additional documentation.



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.

Lesson 2 Review

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

Course Map

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

Lesson 3 Objectives

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

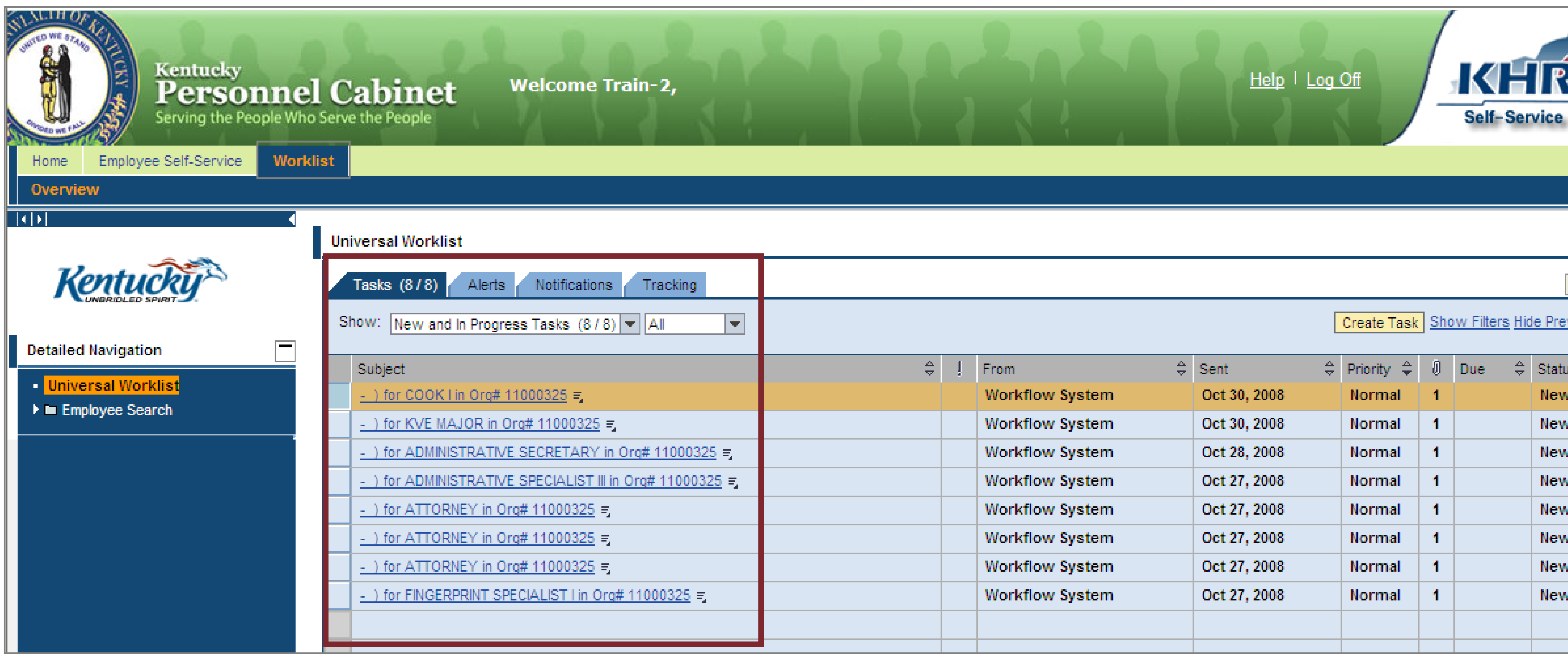
- HRG completes form and initiates workflow
- KHRIS routes form through agency workflow
- Final Agency Approver completes agency workflow
- KHRIS routes form through Personnel Cabinet workflow
- Personnel Cabinet approves or rejects form
- If approved, infotypes are added and/or changed
- If rejected, infotypes are not updated

Workflow

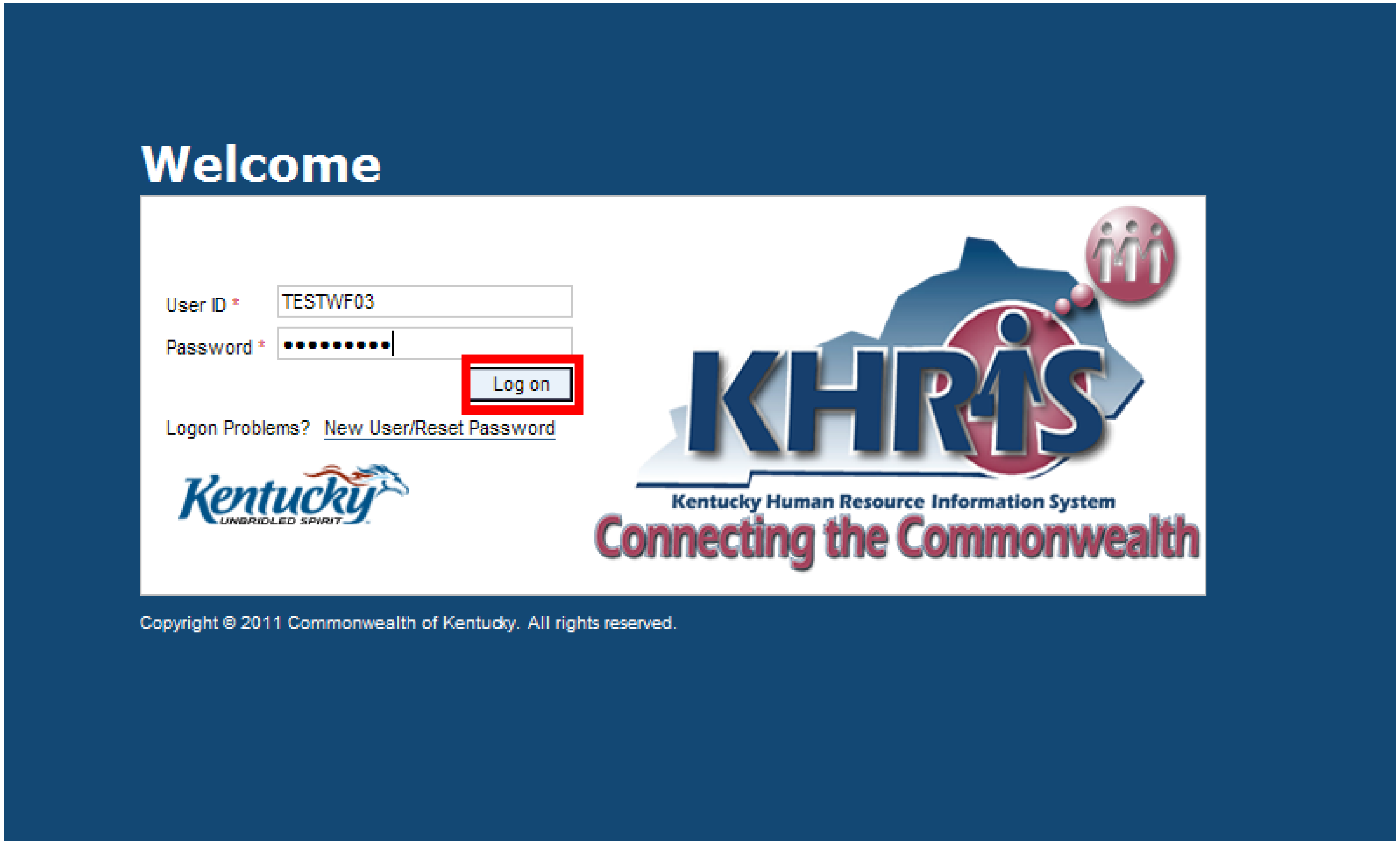
- Workflow will appear in the Level Approvers worklist
  - Approvers are identified in a pre-determined order. For example, there may be 2 Level 1 approvers, and one Level 2 approver
- If more than one person sits at an approval level, once the action is "picked" up by one person, it will be removed 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

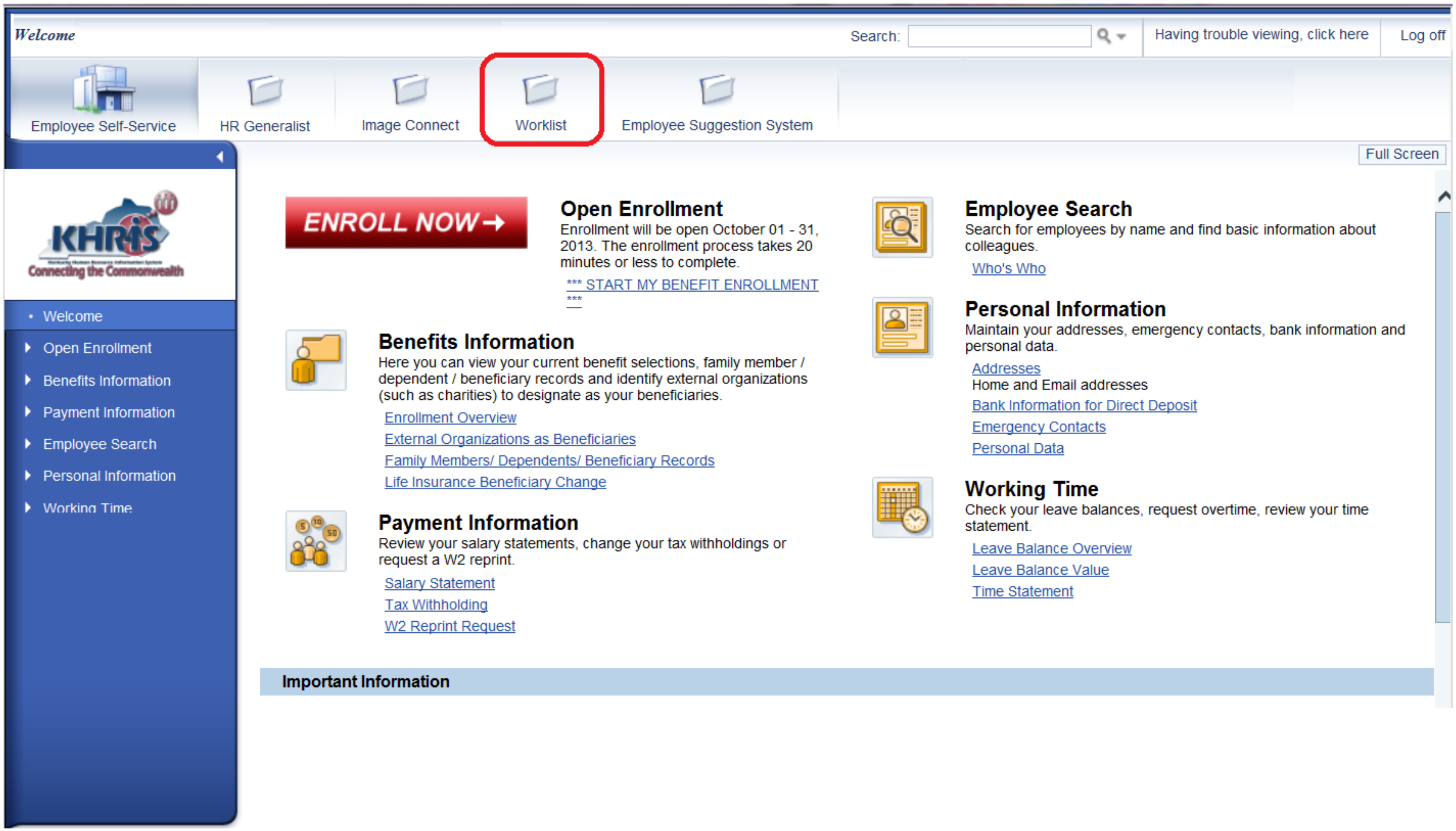
- Configured to automatically route workflow items to the appropriate approver or approvers.
- Records waiting for approval are accessed through the portal in the approver's Universal Worklist (UWL)



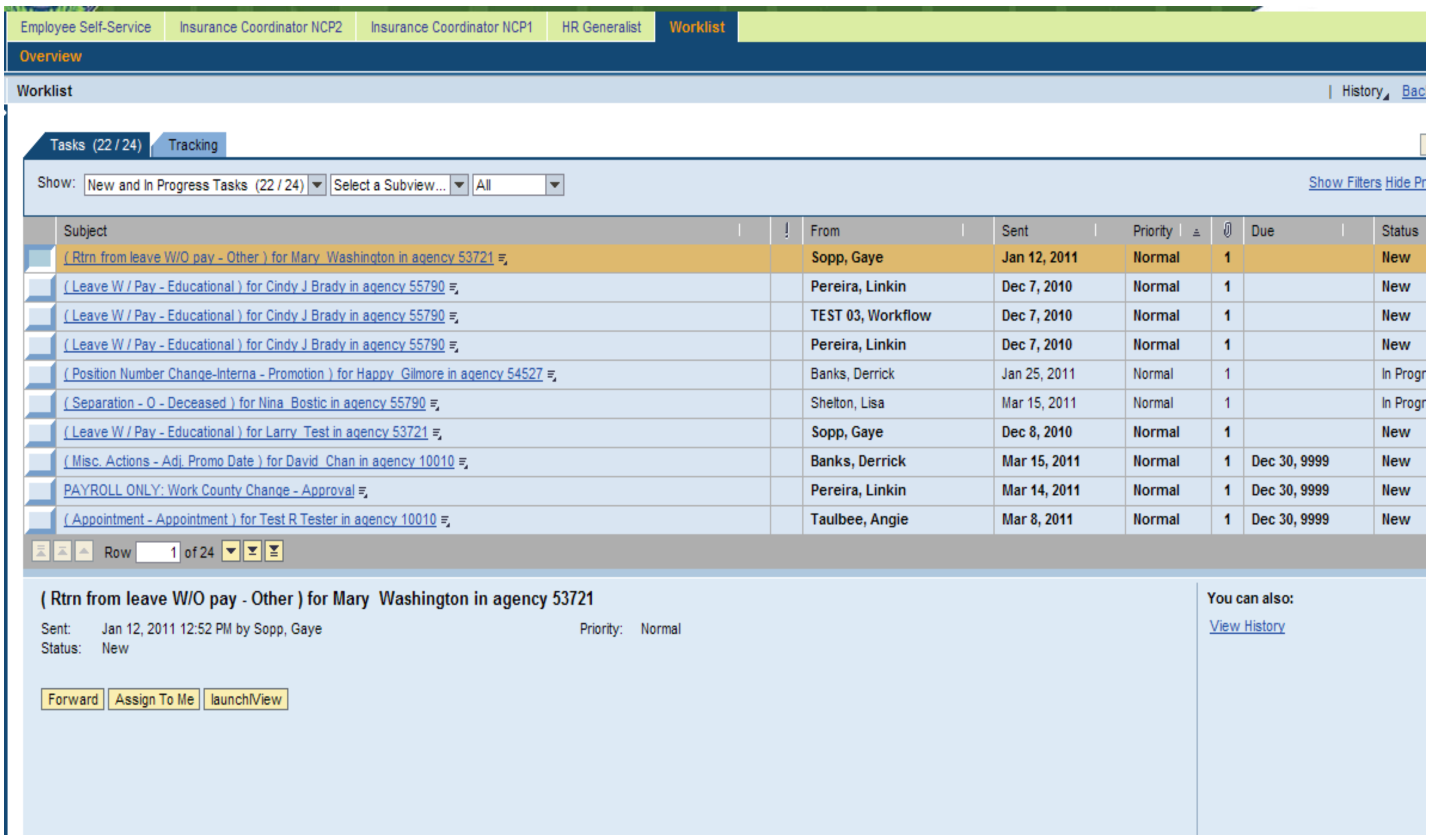
Log on to Employee Self-Service (ESS)



Click the Worklist tab.



Your worklist will be displayed.



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.)

Tasks (74 / 75) | Alerts | Notifications | SAPoffice Mails | Tracking

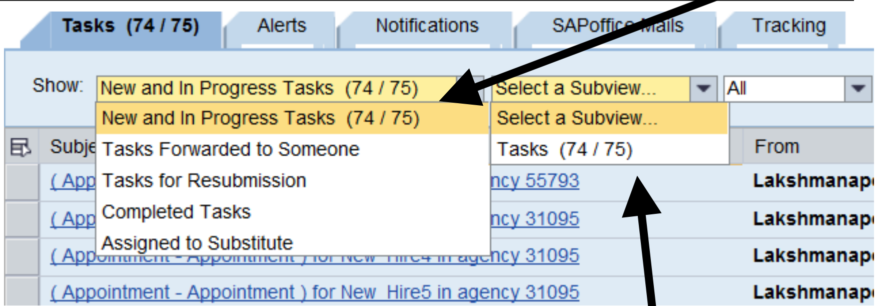
Show: New and In Progress Tasks (74 / 75) | Select a Subview... | All

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

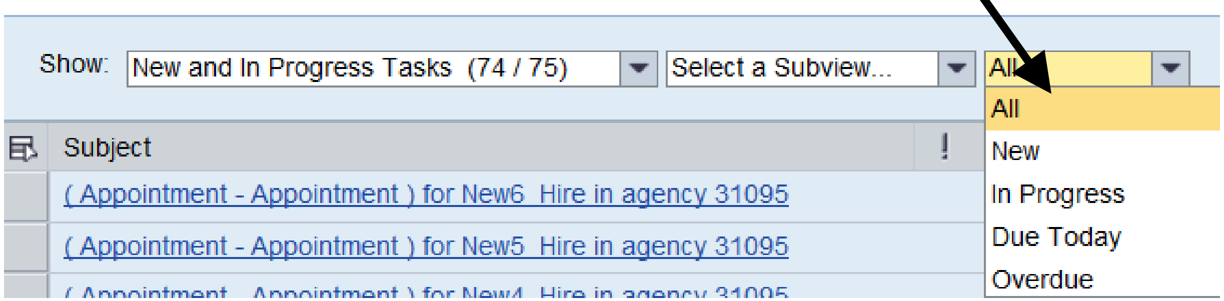
There are several ways to filter your worklist.

1 The first drop down list shows the following options.



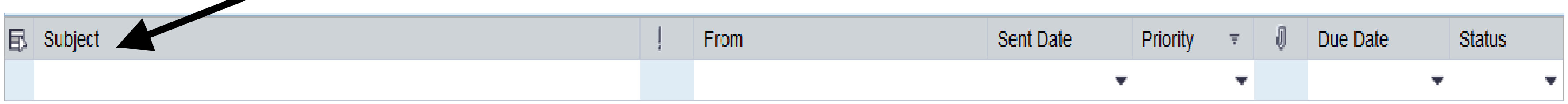
2 The second drop down list only has one available option; it allows you to select the tasks.

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



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

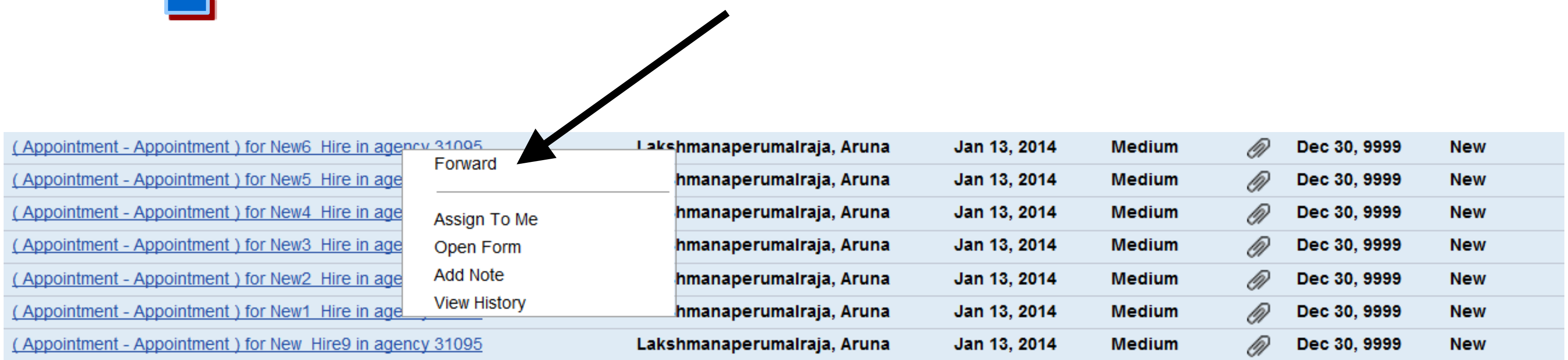
Key word filters become available across the column headers. For example, you may search for a specific employee's name (Smith) in the subject or a specific type of action (Appointment).



Forwarding a Worklist Item - Workflow

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

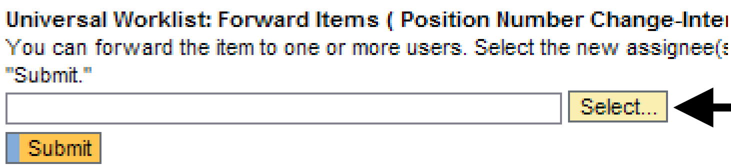
2 **Select Forward from the menu.**



Forwarding a Worklist Item - Workflow

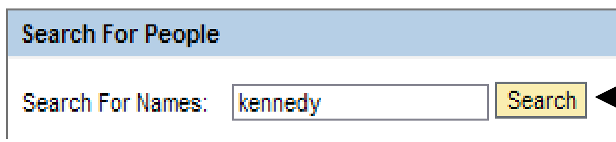
3

Click the Select button to check names and find people.



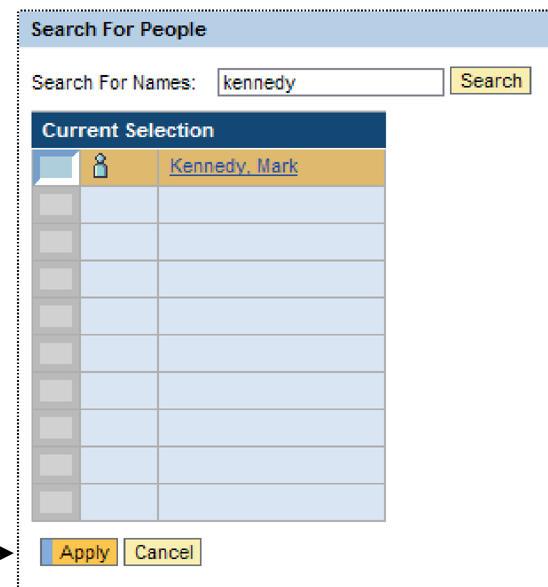
4

Type in last name then click Search.



5

When the name populates click Apply.



6

Name will populate. Click Submit.

Universal Worklist: Forward Items (Position Number Change-Interna - 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

Select...

Submit

7

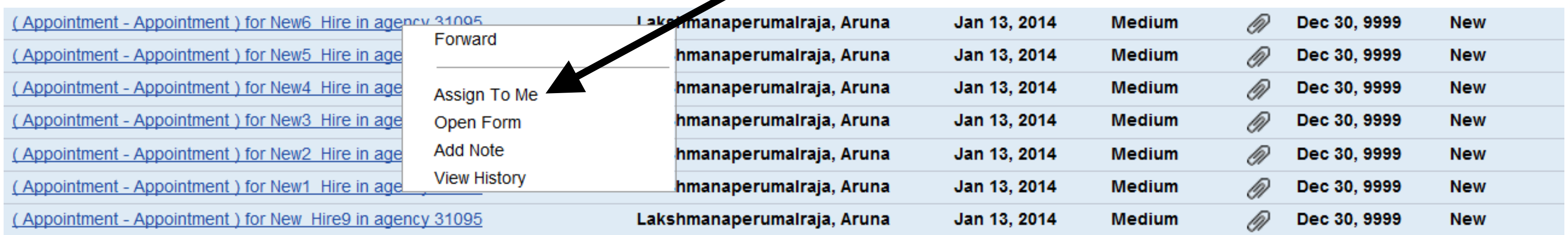
Success message will display.

Item was forwarded successfully

Assigning a Worklist Item - Workflow

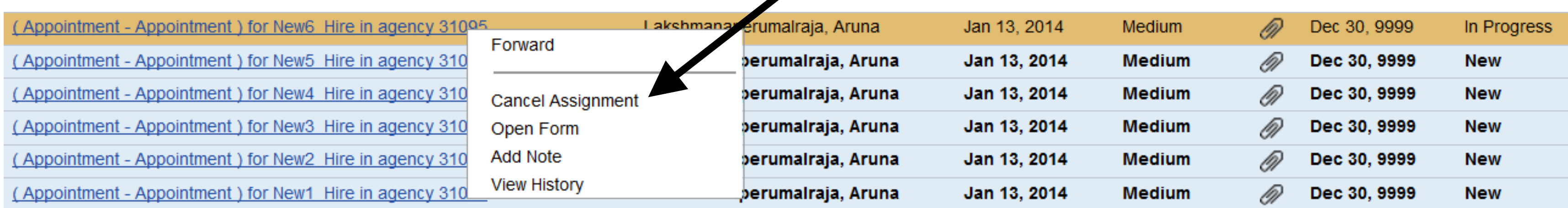
1

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.



2

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



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Connecting the Commonwealth

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 Fiel

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 age	hmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New4 Hire in age	hmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New3 Hire in age	hmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New2 Hire in age	hmanaperumalraja, Aruna	Jan 13, 2014	Medium	Dec 30, 9999	New
(Appointment - Appointment) for New1 Hire in a	hmanaperumalraja, 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

Forward

Assign To Me
Open Form
Add Note
View History

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

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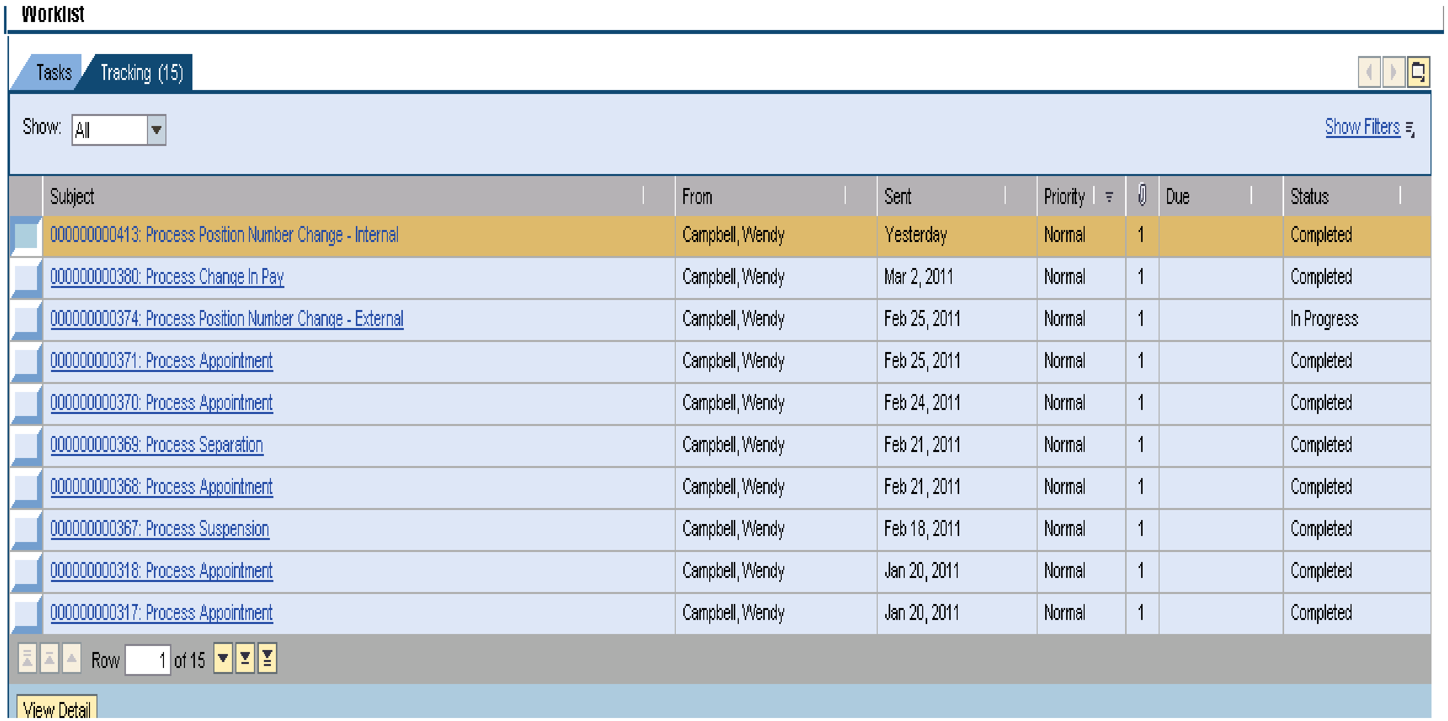
The Tracking Tab shows your items and the status with the process reference number.



Worklist

Tasks | Tracking (15)

Show: All

Show Filters

Subject	From	Sent	Priority		Due	Status
000000000413: Process Position Number Change - Internal	Campbell, Wendy	Yesterday	Normal	1		Completed
000000000380: Process Change In Pay	Campbell, Wendy	Mar 2, 2011	Normal	1		Completed
000000000374: Process Position Number Change - External	Campbell, Wendy	Feb 25, 2011	Normal	1		In Progress
000000000371: Process Appointment	Campbell, Wendy	Feb 25, 2011	Normal	1		Completed
000000000370: Process Appointment	Campbell, Wendy	Feb 24, 2011	Normal	1		Completed
000000000369: Process Separation	Campbell, Wendy	Feb 21, 2011	Normal	1		Completed
000000000368: Process Appointment	Campbell, Wendy	Feb 21, 2011	Normal	1		Completed
000000000367: Process Suspension	Campbell, Wendy	Feb 18, 2011	Normal	1		Completed
000000000318: Process Appointment	Campbell, Wendy	Jan 20, 2011	Normal	1		Completed
000000000317: Process Appointment	Campbell, Wendy	Jan 20, 2011	Normal	1		Completed

Row 1 of 15

View Detail

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.

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Lesson 3 Review

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

Course Map

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

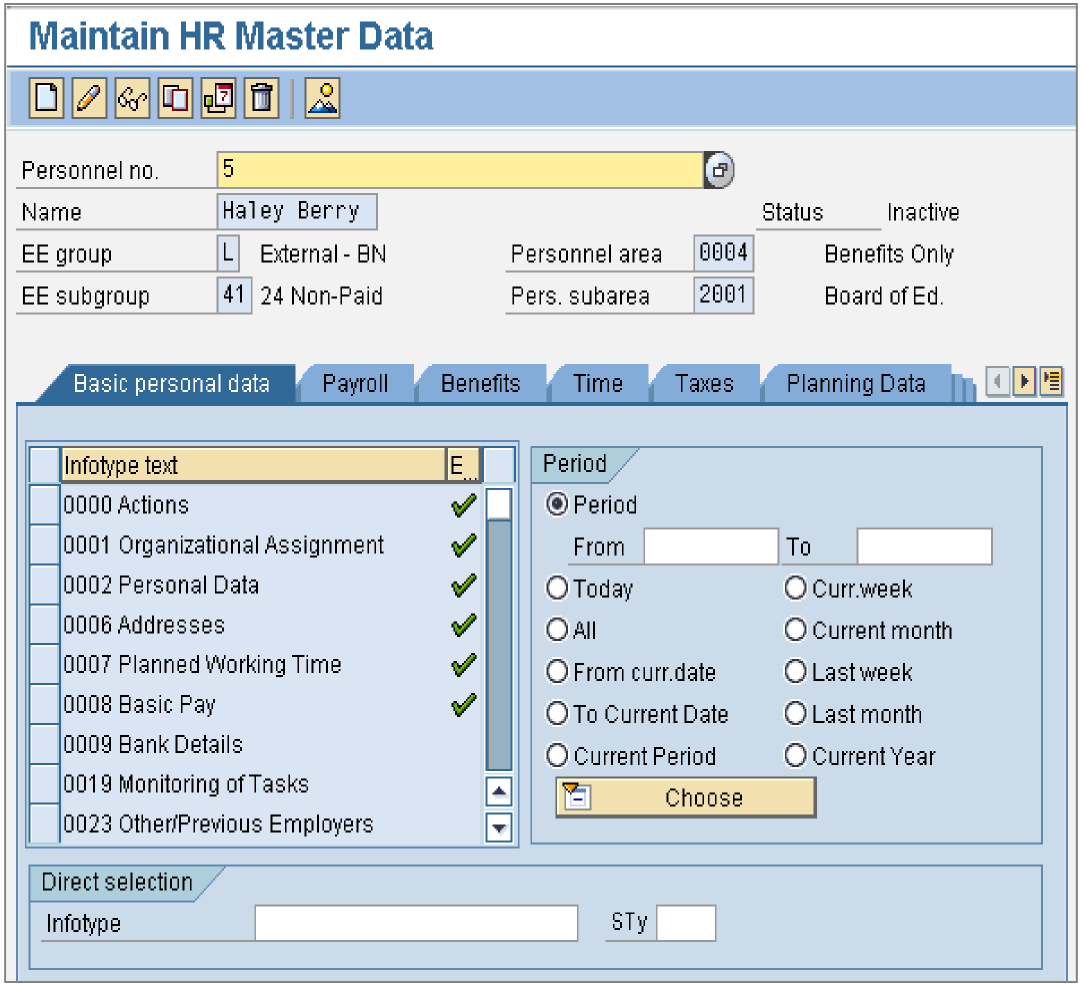
Wrap Up

Lesson 4 Objectives

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.

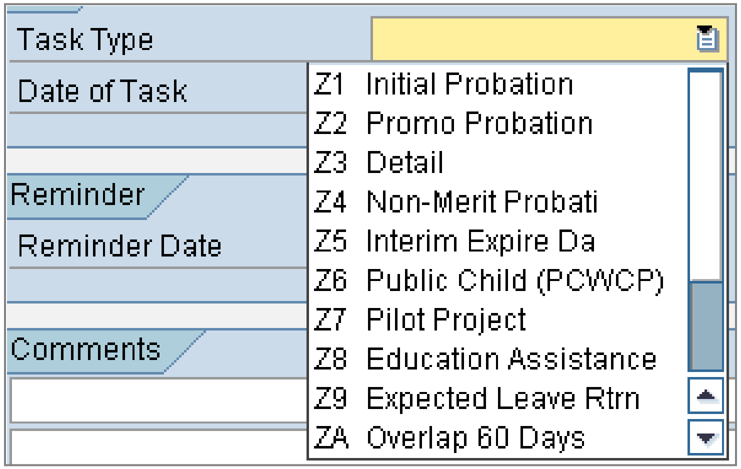


Helpful Hints for PA30

Gather Data

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

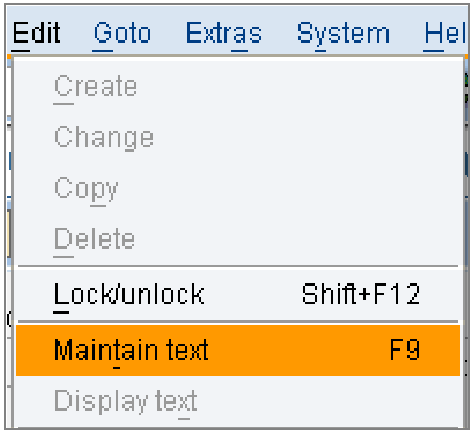
Monitoring of Dates – IT 0019:



- 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.

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



Date Specifications

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

KHRIS Kentucky Human Resource Information System Connecting the Commonwealth

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.

Knowledge Check

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.

Lesson 4 Review

In this lesson you learned to:

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

Kentucky Human Resource Information System

Connecting the Commonwealth

Reports

Lesson 5

Course Map

Lesson 1: Personnel Administration Overview

Lesson 2: Forms and Personnel Actions

Lesson 3: Workflow

Lesson 4: Maintain Master Data

Lesson 5: Reports

Wrap Up

Lesson 5 Objectives

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

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

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.

Knowledge Check

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

Course Review

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

KHRIS Jeopardy

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

Next Steps

- 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