HR Connect User Guide

November 2012

VERSION HISTORY

Version	Issuance Date	Prepared By	Description of Change
1.0	11/19/2012	Scott D. Sandberg & Andrew P. Clark	New User Guide

TABLE OF CONTENTS

CHAPTER 1: INTRODUCTION

1.1 OVERVIEW

First and foremost, this is a User Guide, and not a Technical Manual. As such, this document will focus on procedures within the system but will not cover, in detail, professional HR practices and policies or underlying system mechanics. This guide is organized by both system functionality and user role, and its primary purpose is to provide the average user with the information and instruction (about core functionality) necessary to conduct actions within HR Connect.

1.2 FUNCTIONS

HR Connect is a web based application that enables human resource professionals, managers, and employees to more efficiently and easily manage HR processes within their organization.

As previously stated, this guide is focused on core functionality. Core functionality is defined as any system component in use by a majority, or near majority, of HR Connect customer organizations.

The following is considered to be core functionality, and therefore is included in this document:

- Basic Role Functionality
  - Employee Self Service (ESS)
  - Manager Self Service (MSS)
  - Human Resources Self Service (HRSS)
- Position Management
- Recruitment
- Labor Relations
- Personnel Action Requests (e.g., Hiring, Promotion, Detail, etc.)
- Payroll
- FAIR Act
- Performance Management (e-Performance)
- Reporting Tools

Walkthroughs are provided for the above functionality whenever possible. It should be noted that while organizations may share functionality, the specific steps may differ slightly based on how the system has been customized for your organization. Additionally, your access to functionality in HR Connect is heavily dependent on your role within the system.

1.3 Roles

While user roles may be customized to suit your organization's needs, the primary roles available are Employee Self Service (ESS), Manager Self Service (MSS), and Human Resources Self Service (HRSS).

Employee Self Service (ESS)

ESS users have the lowest level of access within the system. They will only be able to initiate actions and view information relating to their own accounts. ESS users are able to initiate Data Change, Retirement, and Resignation actions.

Manager Self Service (MSS)

MSS users have the capability to perform actions on subordinates. While primarily actions will be taken on direct reports, HR Connect includes functionality for MSS users to initiate actions on other subordinates (including detailed employees). While an MSS user may initiate actions on other individuals, an MSS user is unable to make that action effective without the approval of an HRSS user.

Human Resources Self Service (HRSS)

HRSS users have the most access to HR Connect functionality. An HRSS user can initiate, authorize, and process personnel actions. An HRSS user also has access to the Back End of HR Connect where a user may manually locate and edit an employee's record. For more information about each roles functionality, consult the ESS, MSS, and HRSS chapters respectively.

1.4 Using the User Guide

This document is intended to be a user friendly guide, enabling users to easly locate and acquire information needed to successfully complete tasks in HR Connect. In addition, the document was designed to be easily accessible and 508 compliant. All of the styles which are used are for the purpose of making the document user friendly.

Sections and topics have been organized in a logical progression (e.g., general background information followed by more specific information and detailed instruction), while screenshots and other graphics have been labeled and organized to further clarify the text. The User Guide is also designed so that individual sections can function as separate documents. As a result, references between sections are used sparingly.

To easily navigate through the document, each page includes a link back to the **Table of Contents**. This link is located on the left side of each page's footer. Selecting the **Table of Contents** link will take you to the **Table of Contents**.

Chapter 1 Figure 1: Table of Contents Link

Whenever possible, this document makes use of both screenshots and text to describe system components. All screenshots include a caption (see above) and alternative text (viewable only in electronic form). When necessary, screenshots may also include **instructional** or **informational** callouts.

Orange text indicates descriptive, non-instructional, information. To draw attention to information in a screenshot, an orange box will be used to highlight the necessary region or field. In addition, orange lettered callouts are used to match the highlighted area to its corresponding **orange text** (see below).

Chapter 1 Figure 2: Sample Informational Box & Callout

A. Informational- This information is descriptive but is not presented in a step-by-step order. In practice, these callouts are commonly used to highlight additional information or to provide context for instructional callouts.

Alternatively, **blue** text is used to identify instructional information. **Blue** text indicates that an action is required on your part. Instructional information is often presented in walkthroughs, which present step-by-step instruction numerically (see below).

1. Instructions are presented as a number list. If a named field is included in a step AND requires input, it will be presented with **instructional blue text**.
2. If a page or field are referenced, but do not require input, they will be presented in **bold text**.

Chapter 1 Figure 3: Sample Instructional Box & Callout

Additionally, walkthroughs will also include a navigation path to assist users in locating the action's starting page:

Manager tab>People and Positions pagelet>Employee Name link>Employee Data page

1. The above navigation path indicates that, starting on the **Manager** tab, you locate the **People and Positions** pagelet and select the employee's name which will take you to the **Employee** Data page.

Chapter 2: Accessing HR Connect

To log in to HR Connect, use your browser to navigate to http://www.hrconnect.treas.gov. This will open the HR Connect Login page:

Chapter 2 Figure 4: HR Connect Login Screen

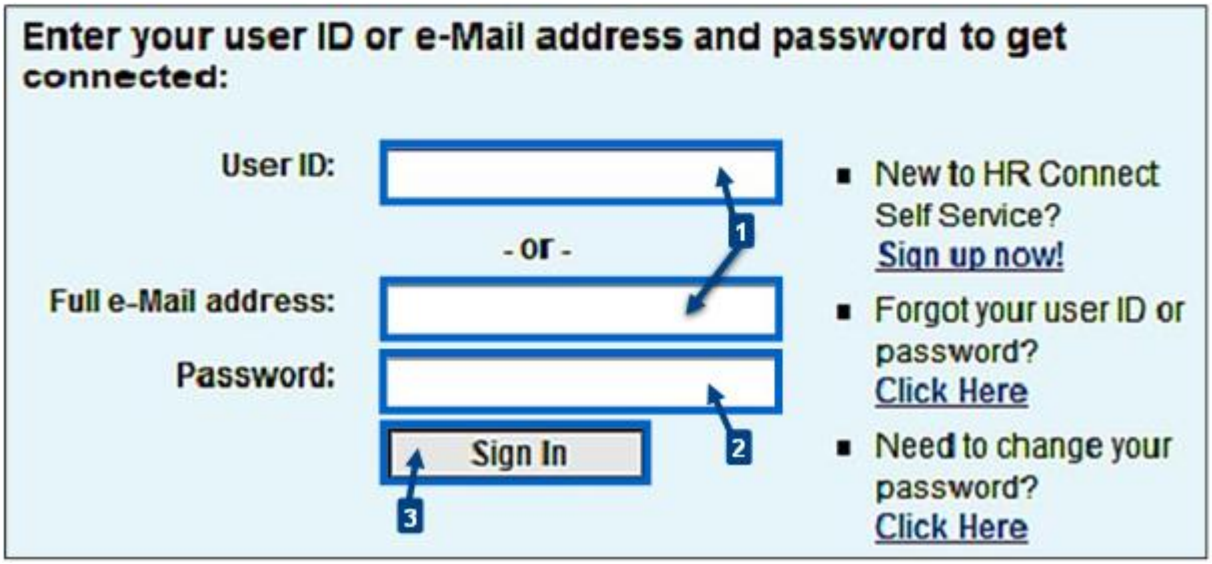
The HR Connect Login page consists of 3 columns:

A. **Special Announcements**- The special announcements pagelet presents HR Connect news and notices.
B. **Welcome to HR Connect Login**- The welcome pagelet includes the system login fields as well as sign up, retrieve user ID/password, and change password links.
C. **HR Connect Features**- The features pagelet includes resources outlining HR Connect functionality for existing and prospective users.

2.1 LOGGING IN

Enter your **User ID** **or** **Full E-Mail Address** in the provided field.

1. Enter your **Password in the field provided**.
2. Select the **Sign In** button. (This will direct you to the HR Connect main page.)



Chapter 2 Figure 5: HR Connect Login 2

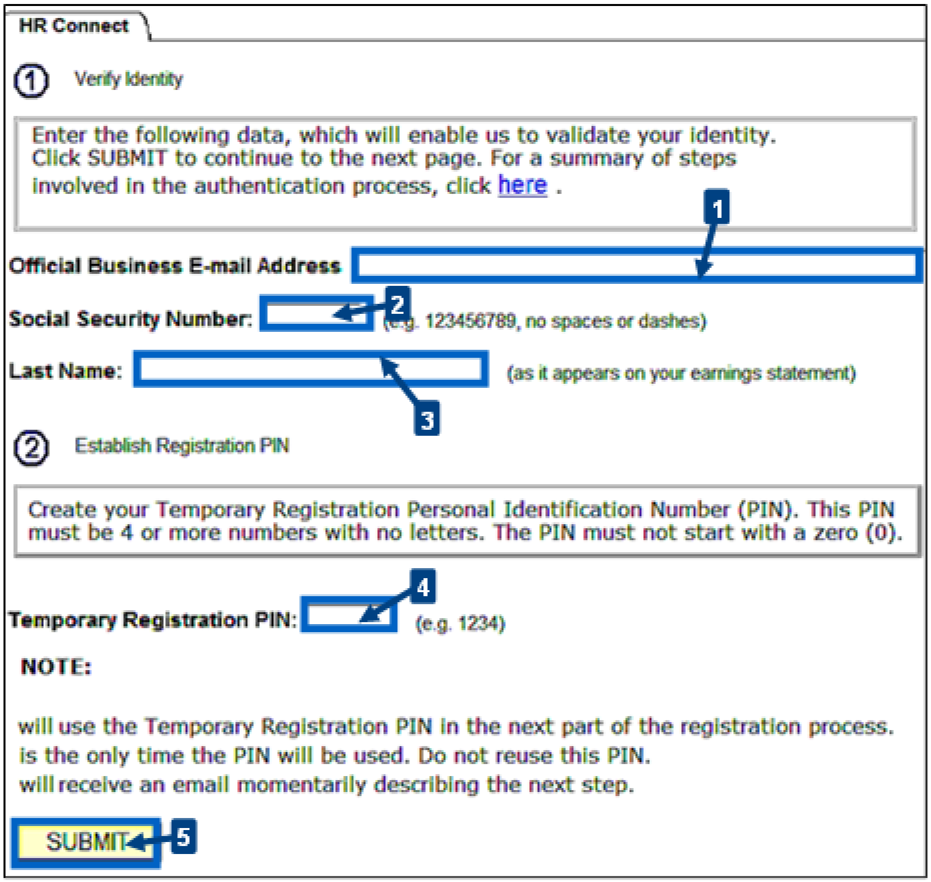
2.2 FORGOT USER NAME OR PASSWORD

If you should forget your User Name or Password, use your browser to navigate to http://www.hrconnect.treas.gov, and perform the following steps:

1. Underneath **Forgot your user ID or password?**, select the **Click Here** link. This will take you to the **Forgot User Name Or Password Verification** page.

Chapter 2 Figure 6: Forgot User Name or Password

2. Enter your **Official Business E-mail Address** in the field provided.
3. Enter your **Social Security Number** in the field provided.
4. Enter your **Last Name** in the field provided.
5. Enter your **Temporary Registration PIN** in the field provided.
6. Select the **Submit** button.



Chapter 2 Figure 7: Forgot User Name or Password

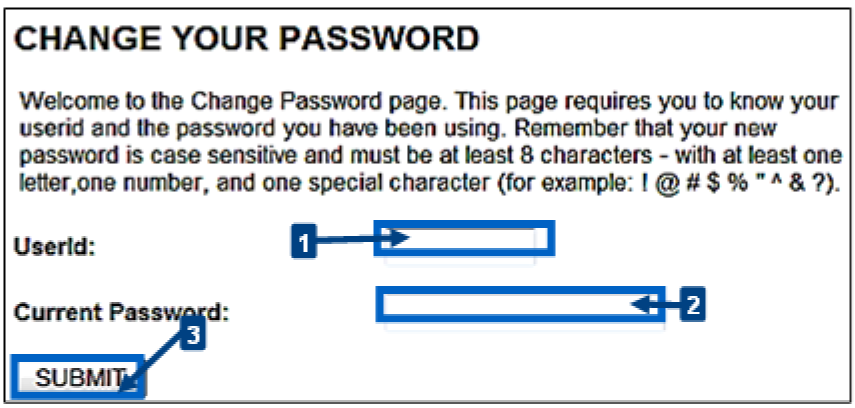
2.3 Changing Your Password

If you need to change your Password, use your browser to navigate to http://www.hrconnect.treas.gov, and perform the following steps:

1. Underneath **Need to change your password?**, select the **Click Here** link. This will take you to the **Change Your Password** page:

Chapter 2 Figure 8: Change Your Password Step 1

2. Enter your user ID in the **UserId** field.
3. Enter your **Current Password** in the field provided.
4. Select the **Submit** button.



Chapter 2 Figure 9: Change Your Password Step 2

2.4 SIGNING OUT

To logout of HR Connect:

Figure 10: The HR Connect Banner

Select the **Sign out** link in the HR Connect Banner. This will direct you to the logout confirmation page:

> **Thank you for using HR Connect! We appreciate your using Treasury's state-of-the-art human resources system.**
>
> **Please remember to close your Internet browser by clicking the "x" at the top right hand corner of your screen..**

Chapter 2 Figure 11: Sign Out Confirmation Page

Chapter 3: Features

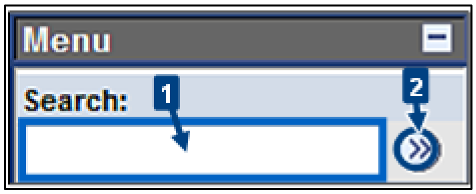
3.1 Overview

In HR Connect, there are a variety of features which can help users to more efficiently navigate and use the system. The following provides specific details as to the location and use of these features.

3.2 Menu Search

The **HR Connect System Menu** contains a **Search Tool**, which allows you to search for items within HR Connect. To conduct a search in the HR Connect System:

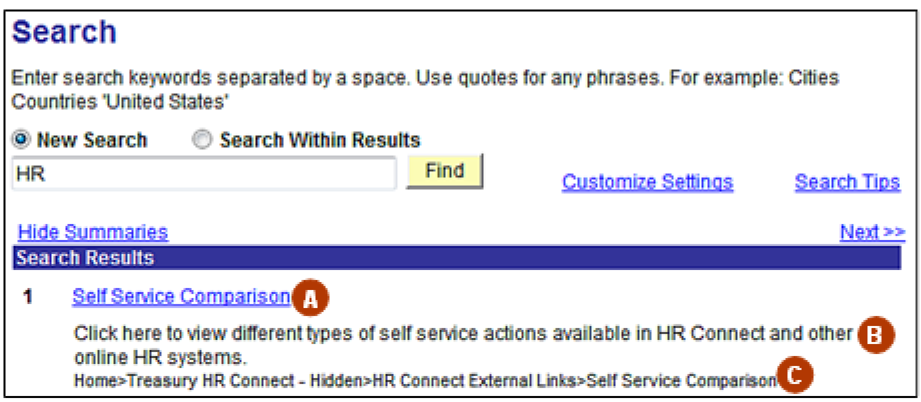
1. On the **Back End Menu,** enter your search criteria in the **Search** field.
2. Select the **Double Arrow** button to the right of the **Search** field.



Chapter 3 Figure 12: Menu Search Tool

If the search returns more than twenty five results, you can navigate between pages by selecting **Next>>** or narrow down the results by refining your terms and selecting **Search Within Results**.

After completing a search, the **Search Results** will display.



Chapter 3 Figure 13: Menu Search Results Page

A. **Search Result**- A hyperlink to the found search item.
B. **Brief Descriptive Summary**- A short synopsis of the search results.
C. **Navigation Path**- The path necessary to navigate to that result from the home page.

To further customize your search results, select the **Customize Settings** link. From there, you can determine whether or not summaries should be displayed, as well as the number of results (10, 25, or 50) that should be displayed per page. For additional search advice, you can select the **Search Tips** link.

3.3 My Favorites

HR Connect system allows you to bookmark important pages in the My Favorites section of the menu. Once bookmarked, these Favorites can also be edited and placed in a different order.

Adding a Favorite

Favorites can either be added using the HR Connect Banner or the Back End Menu. These two methods are detailed in the following walkthrough:

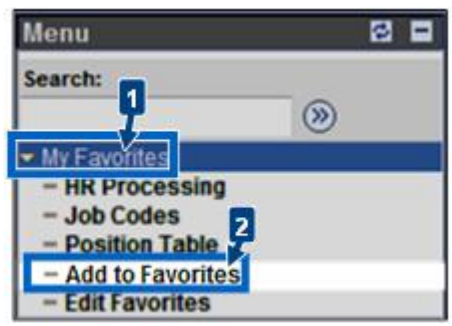
Method 1:

1. (Using the Banner): After you have navigated to the page or folder that you wish to save as a favorite, in the **Banner**, select the **Add to Favorites** link. (Skip to Step 4).

Chapter 3 Figure 14: Banner Add To Favorites Link

Method 2:

1. (Using the Back End Menu): On the **Menu** tab, select the **My Favorites** menu.
2. (Using the Back End Menu): Select the **Add to Favorites** link.



Chapter 3 Figure 15: Back End Menu My Favorites

3. On the **Add to Favorites** page, enter a description (no more than 30 characters) in the **Description** field.

Note: The description entered will become the title of the page in your My Favorites menu.

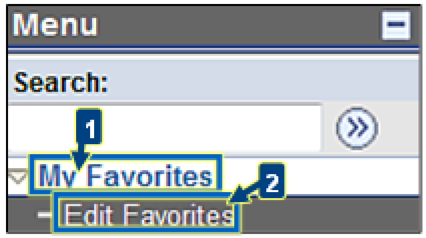
4. Select the **OK** button.

Chapter 3 Figure 16: Add To Favorites

EDITING/REORDERING/DELETING A FAVORITE

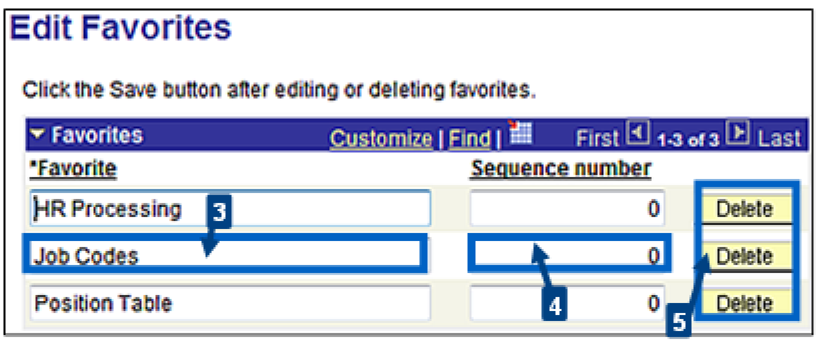
To edit, reorder, and/or delete a favorite:

1. On the **Menu** tab, select the **My Favorites** menu.
2. Select the **Edit Favorites** link.



Chapter 3 Figure 17: Back End Menu My Favorites

3. (To rename your favorite): Modify the text in the **Favorite** field.
4. (To reorder your favorites): Modify the **Sequence numbers**. Lower sequence numbers will be ordered higher in the list.
5. (To delete a favorite): Select the **Delete** button corresponding to the desired favorite.



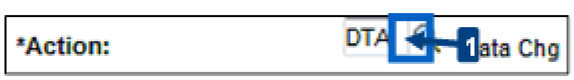
Chapter 3 Figure 18: Edit Favorites Page

3.4 LOOKUP

The **Lookup** feature in HRConnect allows users to input data. Fields with the **Lookup** feature are accompanied by a magnifying glass icon. The **Lookup** provides a list of form data that may be entered into its corresponding field.

To lookup form data:

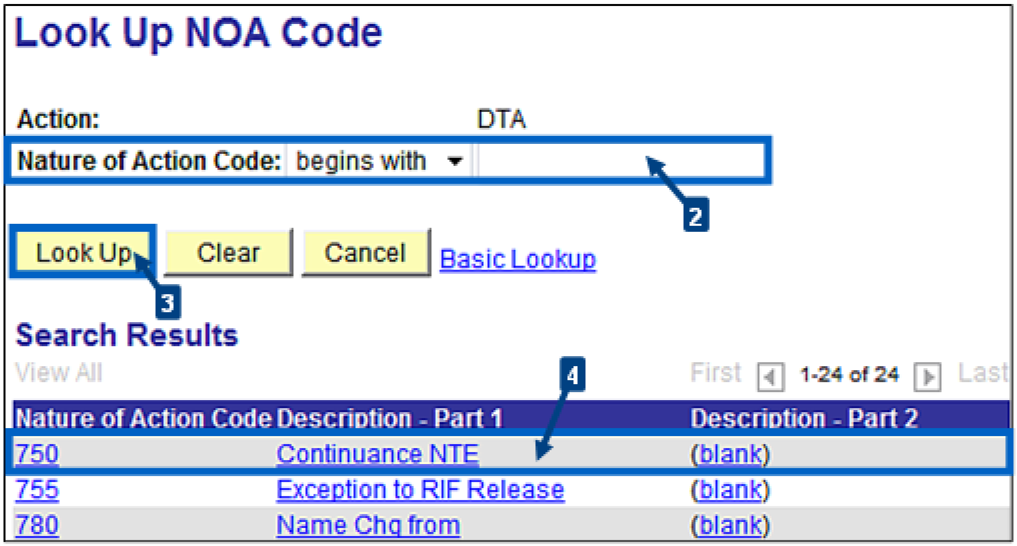
1. Select the **Lookup** icon.



Chapter 3 Figure 19: Magnifying Glass / Lookup Icon

Note: After selecting the lookup you will either be required to search for relevant data or select from a short list.

2. (Optional): Enter relevant search criteria.
3. (Optional): Select the **Look Up** button.
4. Select the desired item from the list. (You will be taken back to the field, which is now filled with data from the item you selected).



Chapter 3 Figure 20: Search Results Page (Lookup)

3.5 Global Table Functions

Most tables in HR Connect contain the functions detailed below.

Chapter 3 Figure 21: Global Table Functions

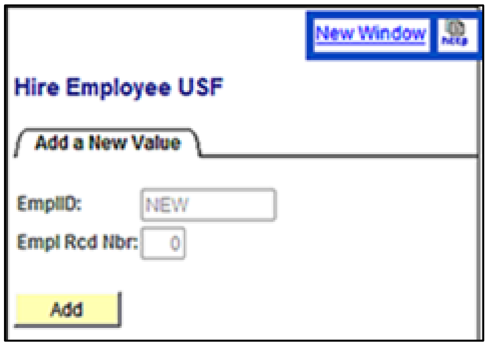
A. **Collapse/Expand**- Selecting the downward facing arrow causes the table to minimize and display only the blue header row. Once collapsed, the arrow will point upwards. Selecting it again will cause the table to reappear.
B. **Table Customization**- Reorganize, freeze/unfreeze (lock/unlock), and hide/unhide table columns.
C. **Find**- This opens an Explorer User Prompt which will allow you to conduct a general search of fields that are visible within the table.
D. **View All**- By default, HR Connect displays only thirty rows of data at a time, not including the header or title rows. To reveal all rows, select the **View All** link.
E. **Download**- This icon opens a **File Download** prompt that will ask .
F. **Next/Previous Page**- To navigate to the first page select the **First** link. To navigate to the previous or next page select the left and right arrow buttons respectively. To navigate to the last page select the **Last** link.

3.6 Opening a Duplicate Window

HR Connect includes a feather that allows users to generate a duplicate window or copy the page's http address. This allows for easier navigation when jumping between pages. Be cautious when working in duplicate windows as changes to one window may influence another.

To open a duplicate window or copy it's http address:

1. (To open a duplicate window): Select the **New Window** link. This will open a duplicate window for the page you are currently on.
2. (To copy the http address): Select the **http** icon. This will automatically copy the page's http address to your computer's clipboard.



Chapter 3 Figure 22: New Page & HTTP Links

CHAPTER 4: NAVIGATION

This section provides a basic overview of navigational terminology and system components as well as walkthroughs on how to navigate HR Connect. It should be noted that not all users will be able to view and access the same content. What you can or cannot see will be determined by the role assigned to your user account.

4.1 HOME PAGE

The main page is the first screen available to you upon logging into the system. It includes all of the tabs available as part of your role, the system banner, and all work area pagelets visible within each tab. Pagelets are HR Connect components that provide access to topically specific information or an application.

After successfully logging into HR Connect, you will be automatically directed to your home tab on the main page. Your home tab is the default tab associated with your role. For example, if you are a Manager your home tab will be the Manager tab.

These components are visually identified below:

Chapter 4 Figure 23: Main Page

The following sections provide more detailed information concerning these system components.

4.2 The Banner

The system banner is located at the top of the page, regardless of what tab or page you're on. It can be used as a tool for easy navigation back to your home tab or out of the system

Chapter 4 Figure 24: The Banner

- **A. Home**- Return to your default home page.
- **B. Sign Out**- Logout from HR Connect.
- **C. Add to Favorites**- Bookmark a page by adding it to your favorites.
- **D. Contact Us**- Get contact information for individuals who can answer HR Connect questions.

4.3 Tabs

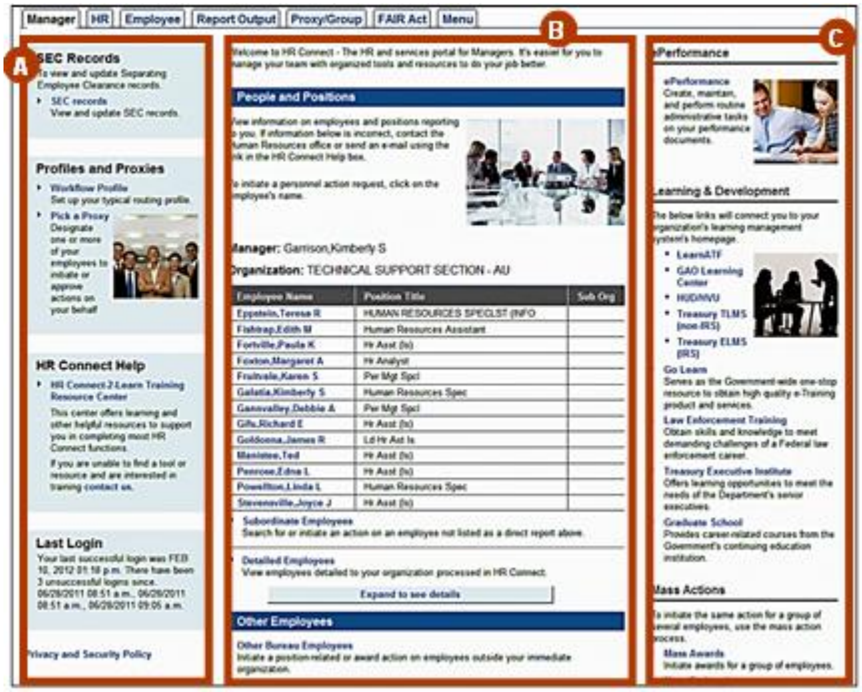
System tabs can be used to easily navigate between work areas. Selecting a tab will allow access to the work area associated with that tab, and all of its functional pagelets therein. While all available tabs are discussed below, not all may be visible from your main page. Access to certain tabs is limited by your role within the system.

Chapter 4 Figure 25: Main Tabs

- **A. Manager**- Access tools for team management.
- **B. HR**- Access tools for most Human Resources functions.
- **C. Employee**- Employees can manage their career & personal benefits information.
- **D. Report Output**- Display & print HR Connect reports.
- **E. Bureau Maintenance**- Create & maintain specifics related to HR workflows, user maintenance, HR & MSS groups, as well as MUM.
- **F. Proxy Group**- View, change, or authorize actions from Manager's Worklist
- **G. Fair Act**- View information & reports relating to the FAIR Act.
- **H. SEC**- View, maintain, & process SEC records.
- **I. Menu**- Access the Back End Menu Pagelet & Navigation Browser.

MANAGER TAB

The **Manager** tab allows access to pagelets whose functionality involves employee, position, workflow, and proxy management. The **Manager** tab also includes access to ePerformance and your personal worklist. The **Manager** tab is divided into 3 columns:



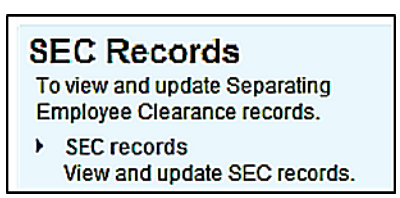
Chapter 4 Figure 26: Manager Tab

- **A. Left Column**- Consists of the **SEC Records**, **Profiles and Proxies**, **HR Connect Help**, and **Last Login** pagelets.
- **B. Middle Column**- Consists of the **People and Positions** and **Other Employees** pagelets. In addition, though not fully visible in the above image, this column includes the **Positions**, **SEC Worklist**, or **Worklist** pagelets.
- **C. Right Column**- The right column consists of the **ePerformance**, **Learning & Development**, and **Mass Actions** pagelets. In addition, though not fully visible in the above image, this column includes the **Manager Tools** and **Reports** pagelets.

These pagelets are discussed below, organized into subsections by column.

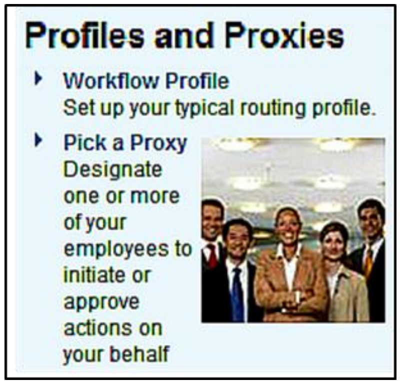
LEFT COLUMN

The **SEC Records** pagelet allows you to view and update Separating Employee Clearance records.



Chapter 4 Figure 27: SEC Records Pagelet

The **Profiles and Proxies** pagelet allows you to setup automated workflows and designate proxies.

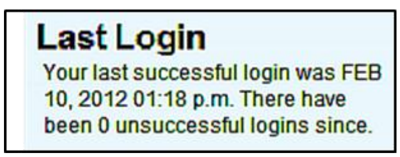


Chapter 4 Figure 28: Profiles and Proxies Pagelet

The **HR Connect Help** pagelet allows you to access the HR Connect-2-Learn Training Resource Center. This Center includes training resources such as job aids, online tools, and classroom training, etc.

Chapter 4 Figure 29: HR Connect Help Pagelet

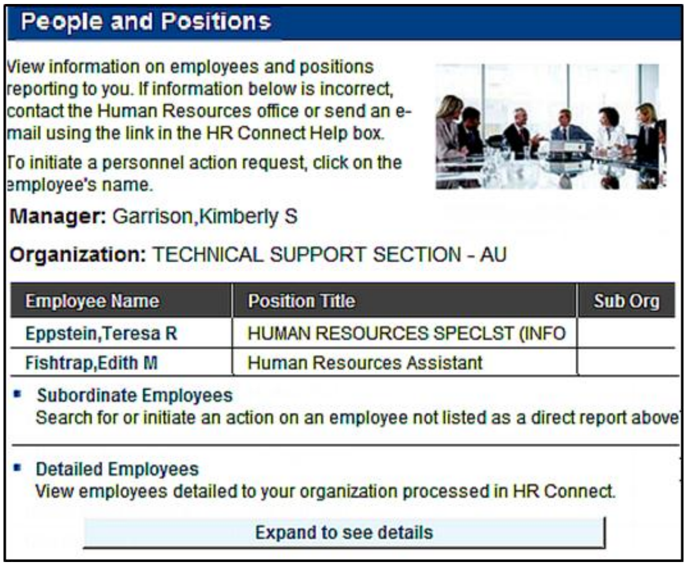
The **Last Login** pagelet displays the date & time of your last login attempt as well as the number of unsuccessful logins since you last accessed HR Connect.



Chapter 4 Figure 30: Last Login Pagelet

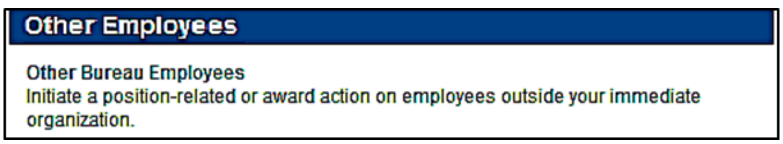
Middle Column

The **People & Positions** pagelet allows you to initiate PAR actions, create new positions, and initiate recruitment actions.



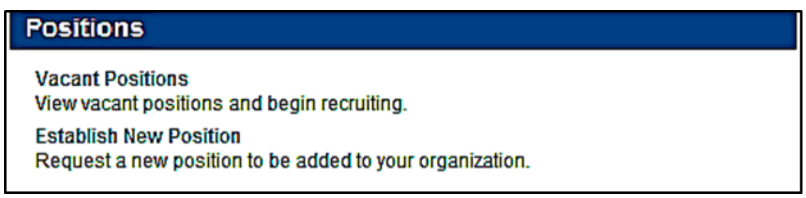
Chapter 4 Figure 31: People & Positions Pagelet

The **Other Employees** pagelet allows you to initiate actions on employees outside of your immediate organization.



Chapter 4 Figure 32: Other Employees Pagelet

The **Positions** pagelet allows you to view vacancies, create new positions, and initiate recruitment actions.

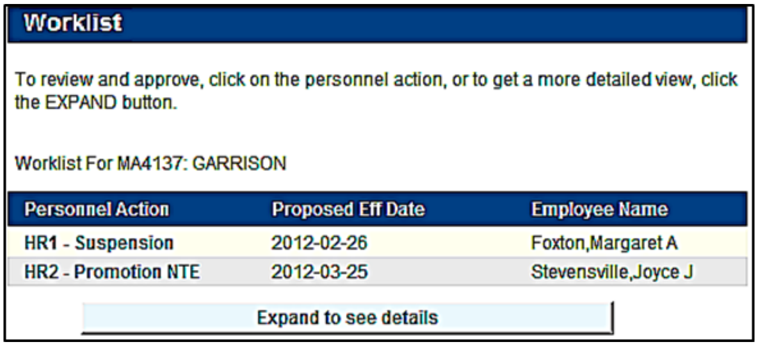


Chapter 4 Figure 33: Positions Pagelet

The **SEC Worklist** pagelet allows you to approve SEC records for your employees.

Chapter 4 Figure 34: SEC Worklist Pagelet

The **Worklist** pagelet allows you to process PARs forwarded to you for approval.



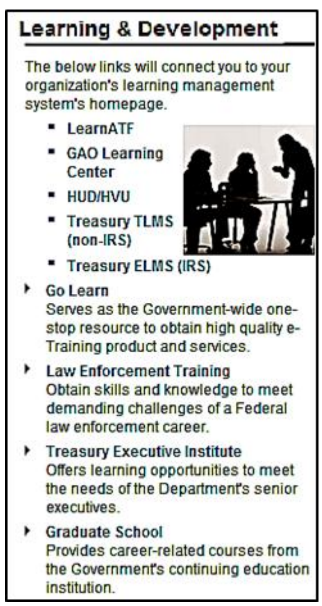
Chapter 4 Figure 35: Worklist Pagelet

RIGHT COLUMN

The **ePerformance** pagelet allows you to create & review performance documents.

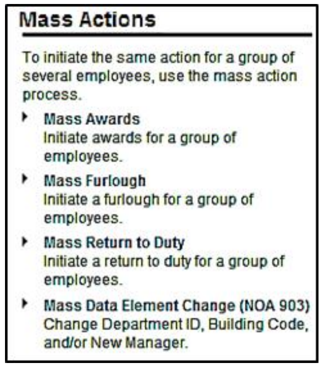
Chapter 4 Figure 36: ePerformance Pagelet

The **Learning & Development** pagelet allows access to your agency's learning system and training resources.



Chapter 4 Figure 37: Learning & Development Pagelet

The **Mass Actions** pagelet allows you to initiate the following actions for groups of employees: Awards, Furlough, Return to Duty, and Mass Element Data Change.

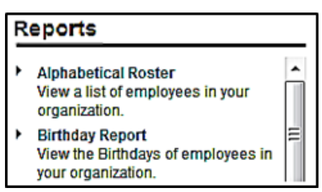


Chapter 4 Figure 38: Mass Actions Pagelet

The **Manager Tools** pagelet allows you to run demographic reports, print position descriptions, and access the Safety and Health Information Management System (SHIMS).

Chapter 4 Figure 39: Manager Tools Pagelet

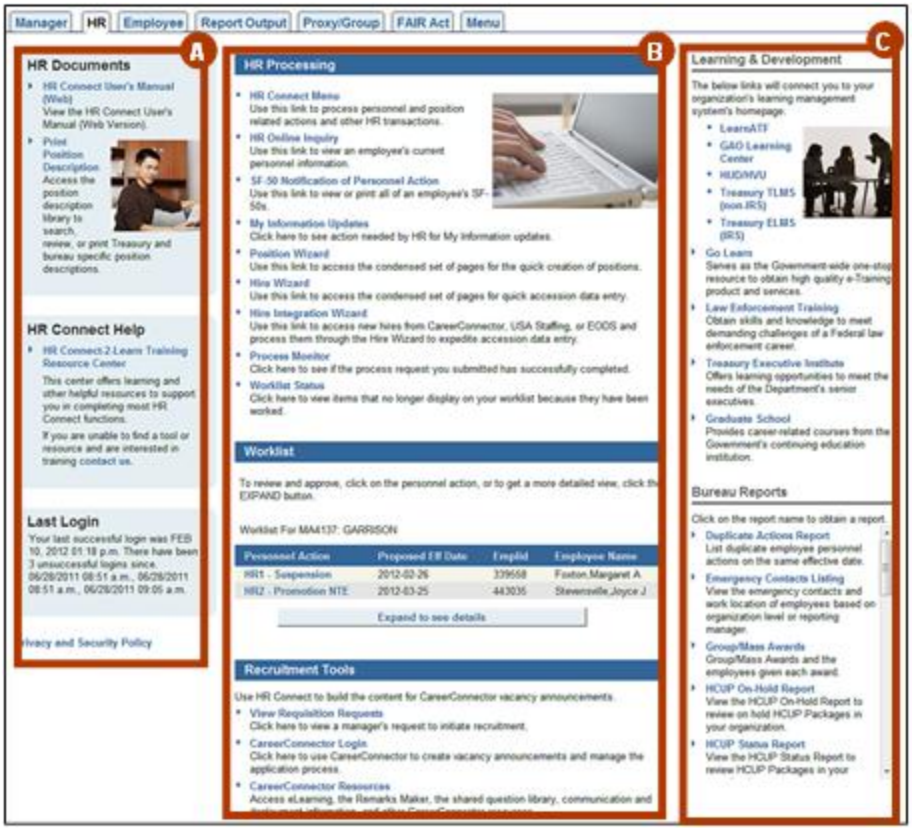
The **Reports** pagelet allows you to run reports on employee information (such as roster, birthday, etc.) and the status of actions initiated on subordinates.



Chapter 4 Figure 40: Reports Pagelet

HR TAB

The Human Resources (**HR**) tab allows access to pagelets whose functionality involves HR processing tools and information. The **HR** tab also includes access to learning resources and your personal worklist. As with most tabs, the **HR** tab is divided into 3 columns:



Chapter 4 Figure 41: HR Tab

A. **Left Column**- Consists of the **HR Documents**, **HR Connect Help**, and **Last Login** pagelets.
B. **Middle Column**- Consists of the **HR Processing**, **Worklist**, and **Recruitment Tools** pagelets.
C. **Right Column**- Consists of the **Learning & Development** and **Bureau Reports** pagelets.

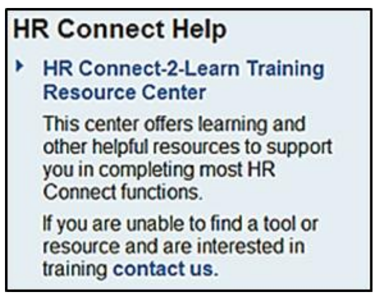
These pagelets are discussed below, organized into subsections by column.

LEFT COLUMN

The **HR Documents** allows you to view HR Connect reference documents and access the position description library.

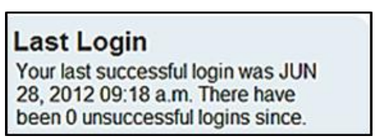
Chapter 4 Figure 42: HR Documents Pagelet

The **HR Connect Help** pagelet allows you to access the HR Connect-2-Learn Training Resource Center. This Center includes training resources such as job aids, online tools, and classroom training, etc.



Chapter 4 Figure 43: HR Connect Help Pagelet

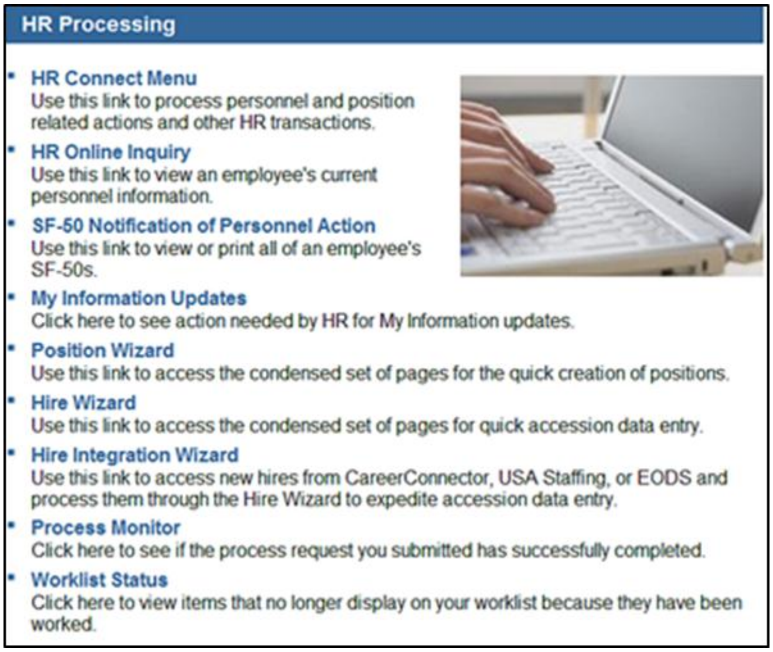
The **Last Login** pagelet allows you to view the date and time of your last login attempt, as well as the number of unsuccessful logins since you last accessed HR Connect.



Chapter 4 Figure 44: Last Login Pagelet

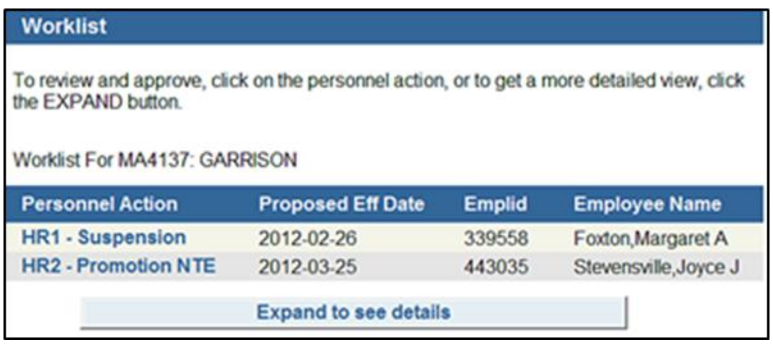
Middle Column

The **HR Processing** pagelet allows you to access the HR Connect Menu, HR Online Inquiry, SF-50 Notification of Personnel Action, My Information Updates, Position Wizard, Hire & Hire Integration Wizards, Process Monitor, & Worklist Status.



Chapter 4 Figure 45: HR Processing Pagelet

The **Worklist** pagelet allows you to access PARs that have been sent to your individual worklist.



Chapter 4 Figure 46: Worklist Pagelet

The **Recruitment Tools** pagelet allows you to view a manager's recruiting requests, access CareerConnector, and CareerConnector Resources.

Chapter 4 Figure 47: Recruitment Tools Pagelet

RIGHT COLUMN

The **Learning & Development** pagelet allows access to your agency's learning system and training resources.

Chapter 4 Figure 48: Learning & Development Pagelet

The **Bureau Reports** pagelet allows you to access a variety of Bureau reports concerning personnel actions.

Chapter 4 Figure 49: Bureau Reports Pagelet

Employee Tab

The **Employee** tab allows access to pagelets that provide tools to view and manage your personal information. The **Employee** tab also includes access to learning resources and limited access to initiating personnel actions on your account (e.g., retirement, resignation, workers compensation claims, etc.). The **Employee** tab is divided into three columns:

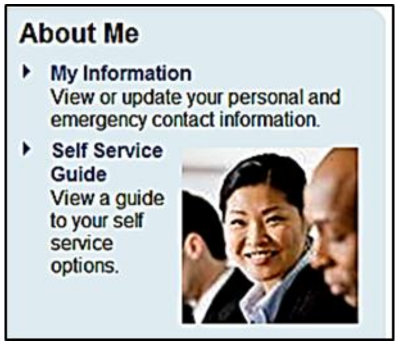
Chapter 4 Figure 50: Employee Tab

D. **Left Column**- Consists of the **About Me**, **HR Connect Help**, and **Last Login** pagelets.
E. **Middle Column**- Consists of the **ePerformance** and **Links to HR Tools** pagelets.
F. **Right Column**- Consists of the **Learning & Development** and **My Career Info** pagelets.

These pagelets are discussed below, organized into subsections by column.

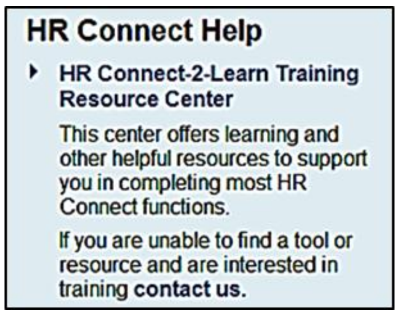
Left Column

the **About Me** pagelet allows you to review and, when appropriate, modify your personal information stored in HR connect.



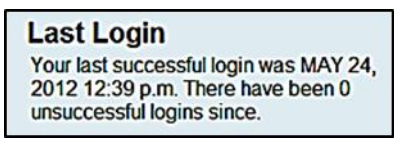
Chapter 4 Figure 51: About Me Pagelet

The **HR Connect Help** pagelet allows you to access the HR Connect-2-Learn Training Resource Center.



Chapter 4 Figure 52: HR Connect Help Pagelet

The **Last Login** pagelet allows you to view the date and time of your last login attempt as well as the number of unsuccessful logins since you last accessed HR Connect.

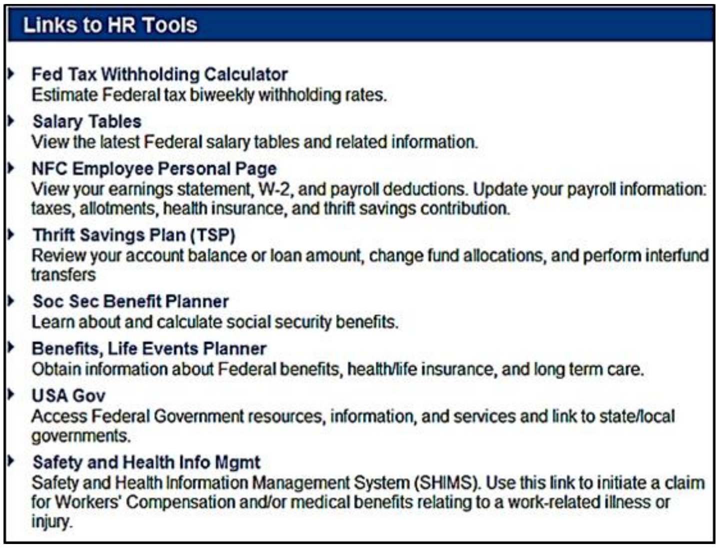


Chapter 4 Figure 53: Last Login Pagelet

The **ePerformance** pagelet allows you to create, maintain, and review performance documents.

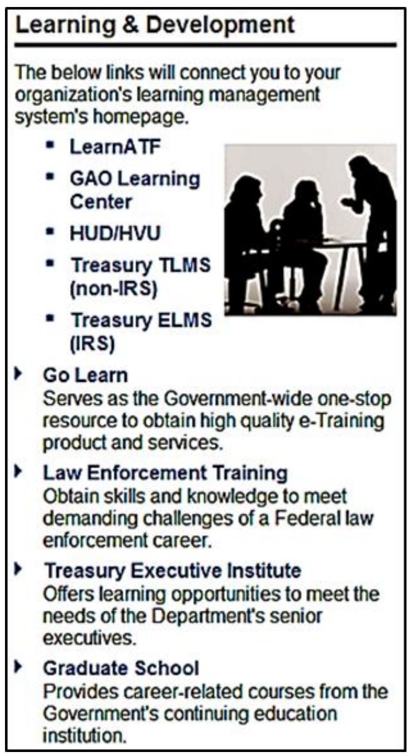
Chapter 4 Figure 54: ePerformance Pagelet

The **Links to HR Tools** pagelet allows you to access external government resources, as well as pay, benefits, and retirement tools.



Chapter 4 Figure 55: Links to HR Tools

The **Learning & Development** pagelet allows access to your agency's learning system and training resources.



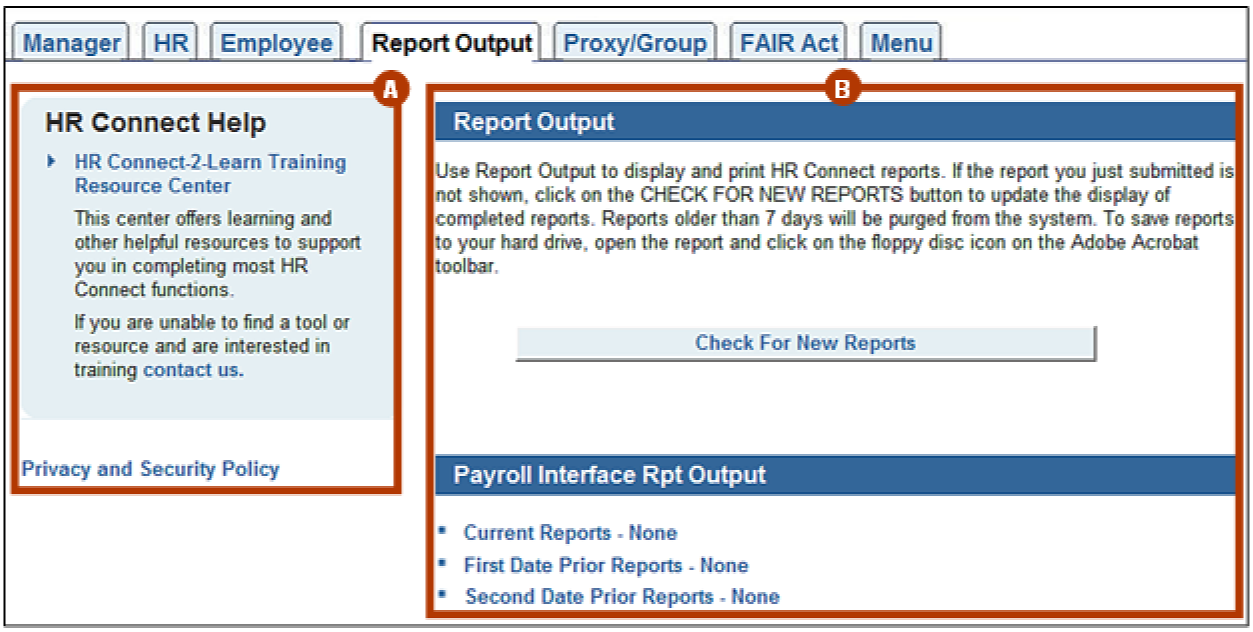
Chapter 4 Figure 56: Learning & Development

The **My Career Info** pagelet allows you to conduct a job search and access the position description library. This pagelet may also include information specific to your organization.

Chapter 4 Figure 39: My Career Info

Report Output Tab

The **Report Output** tab allows access to pagelets that provide tools to check for and review reports generated within the past seven days. Unlike most tabs, the **Report Output** tab is divided into only two columns:



Chapter 4 Figure 57: Report Output Tab

A. **Left Column**- Consists soley of the **HR Connect Help** pagelet.
B. **Right Column**- Consists of the Report Output and Payroll Interface Rpt Output pagelets.

These pagelets are discussed below, organized into subsections by column.

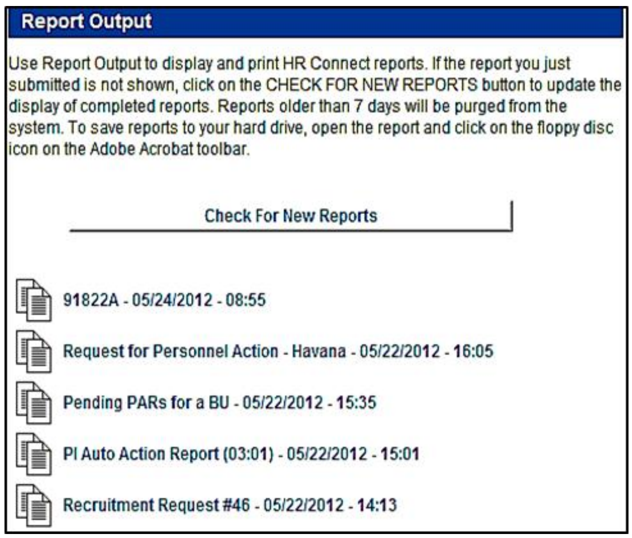
Left Column

The **HR Connect Help** pagelet allows you to Access the HR Connect-2-Learn Training Resource Center.

Chapter 4 Figure 58: HR Connect Help Pagelet

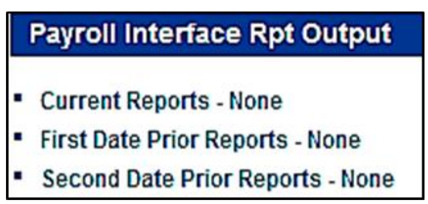
RIGHT COLUMN

The **Report Output** pagelet allows you to display & print HR Connect reports.



Chapter 4 Figure 59: Report Output Pagelet

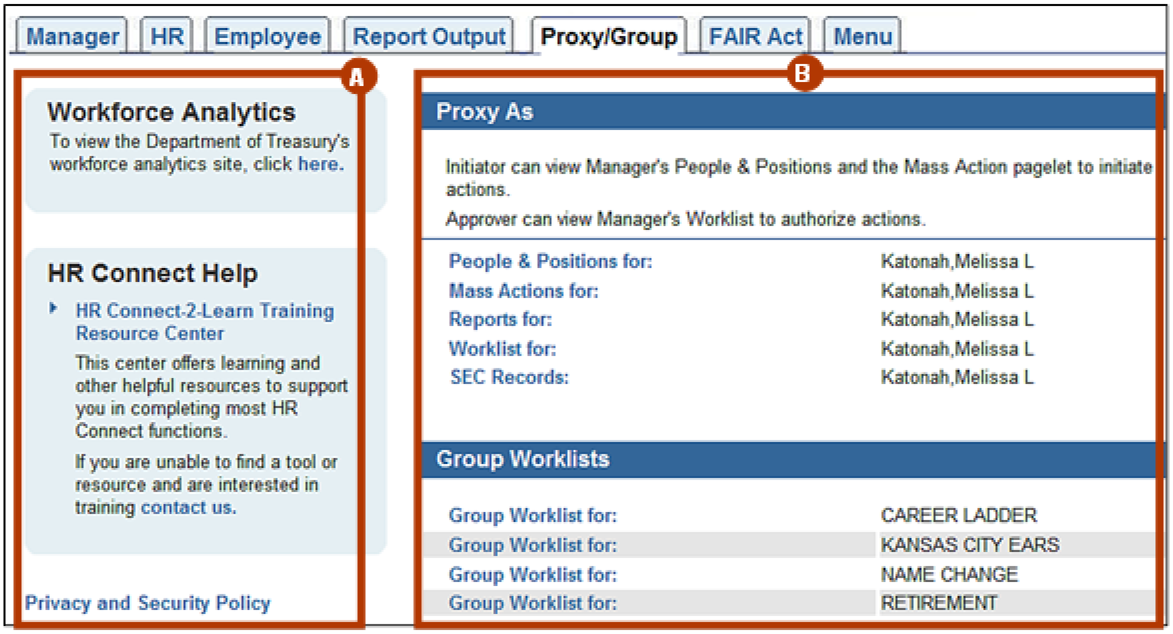
The **Payroll Interface Rpt Output** pagelet allows you to view both Current, First, and Second Date prior reports.



Chapter 4 Figure 60: Payroll Interface Report Output Pagelet

PROXY/GROUP TAB

The **Proxy/Group** tab allows access to the Proxy As and Group work lists pagelets. Unlike most tabs, the **Proxy/Group** tab is divided into only 2 columns:



Chapter 4 Figure 61: Proxy/Group Tab

A. **Left Column**- Consists of the **HR Connect Help** pagelets.
B. **Right Column**- Consists of the Proxy As and Group Worklists pagelets.

These pagelets are discussed below, organized into subsections by column.

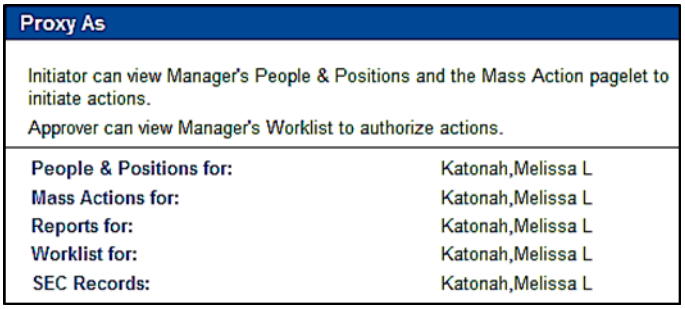
Left Column

The **HR Connect Help** pagelet allows you to Access the HR Connect-2-Learn Training Resource Center.

Chapter 4 Figure 62: HR Connect Help Pagelet

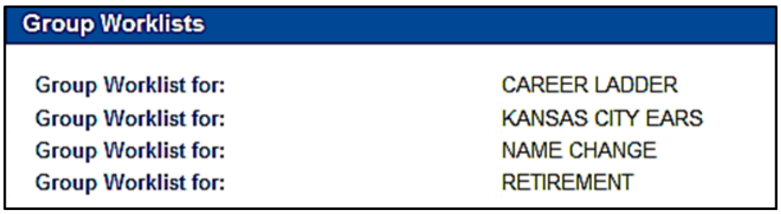
Right Column

The **Proxy As** pagelet provides the ability to initiate or approve actions, SEC documents, mass actions,or reports, on behalf of a manager



Chapter 4 Figure 63: Proxy As Pagelet

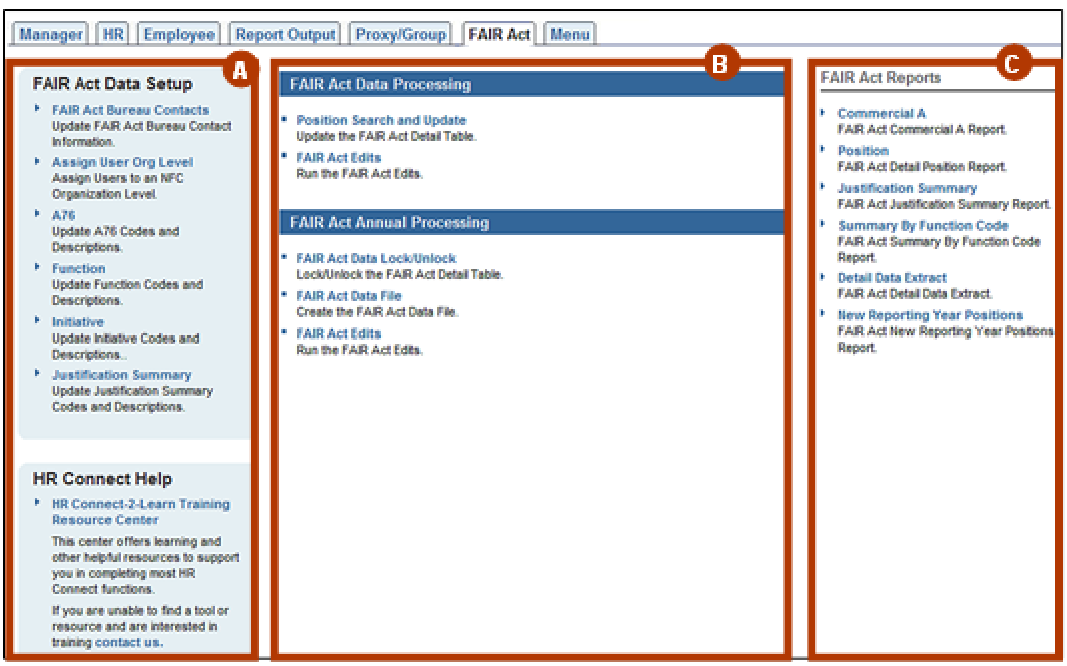
The **Group Worklists** pagelet allows you to access the worklists for your workgroups.



Chapter 4 Figure 64: Group Worklists Pagelet

FAIR Act Tab

The **FAIR Act** tab allows access to pagelets that provide access FAIR ACT data, processing tools, and reports. As with most tabs, the **FAIR Act** tab is divided into three columns:



Chapter 4 Figure 65: Fair Act Tab

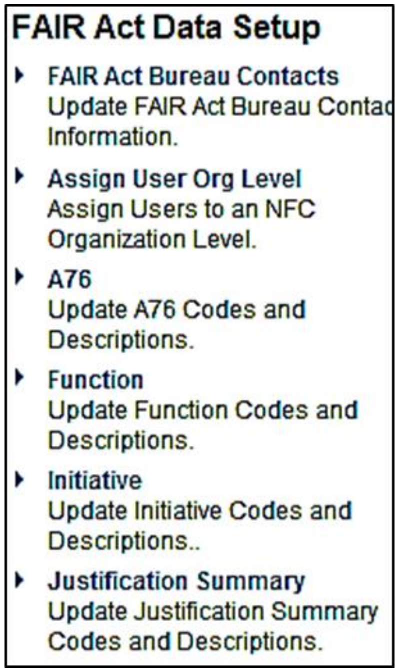
A. **Left Column**- Consists of the FAIR Act Data Setup and HR Connect Help pagelets.

B. **Middle Column**- Consists of the FAIR Act Data Processing and FAIR Act Annual Processing pagelets.
C. **Right Column**- Consists solely of the FAIR Act Reports pagelet.

These pagelets are discussed below, organized into subsections by column.

LEFT COLUMN

The **FAIR Act Data Setup** pagelet allows you to view and update Fair Act data.



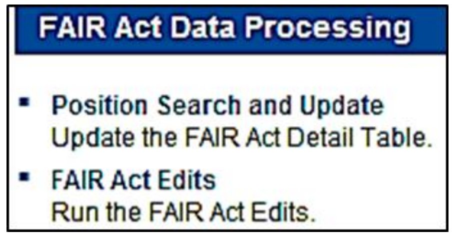
Chapter 4 Figure 66: Fair Act Data Setup Pagelet

The **HR Connect Help** pagelet allows you to access the HR Connect-2-Learn Training Resource Center.

Chapter 4 Figure 67: HR Connect Help Pagelet

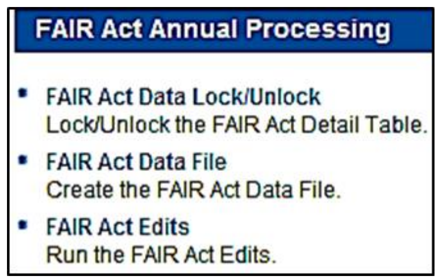
Middle Column

The **Fair Act Data Processing** pagelet allows you to search for and edit Fair Act position information.



Chapter 4 Figure 49: Fair Act Data Processing

The **Fair Act Data Annual Processing** pagelet allows you to view and edit yearly Fair Act data.



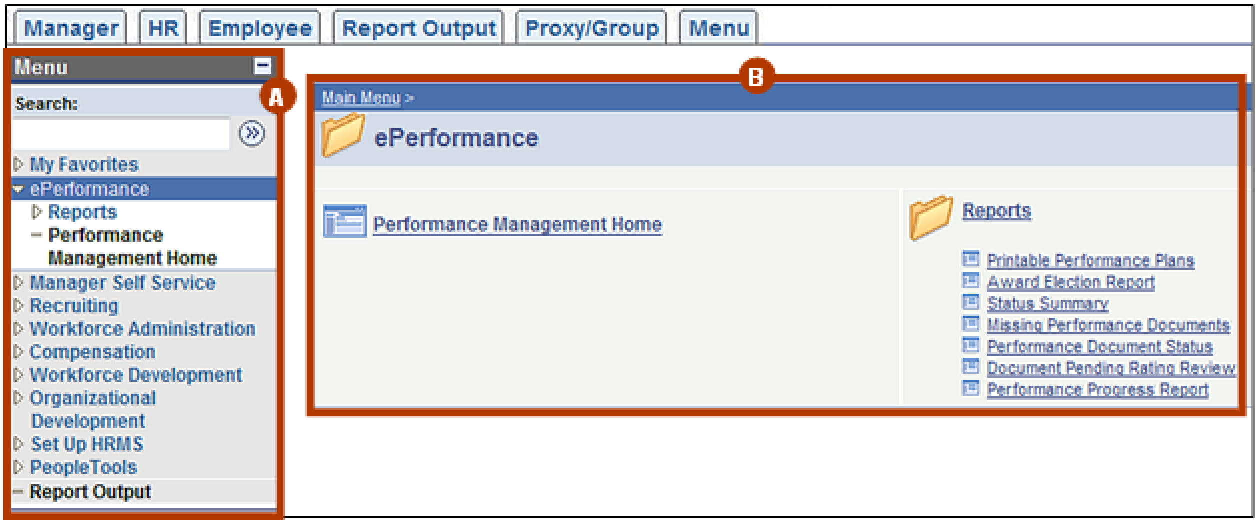
Chapter 4 Figure 50: Fair Act Data Annual Processing Pagelet

The **Fair Act Data Reports** pagelet allows you to generate reports that contain Fair Act data.

Chapter 4 Figure 51: Fair Act Data Reports Pagelet

Menu Tab

The Menu tab allows access to the Back End Menu pagelet. This too can be used to navigate the Back End of HR Connect. The majority of actions discussed in this user guide will be located in the Back End Menu. The Menu tab initially consists of only one column. When an item in the menu is selected, a second pagelet (the Explorer Window) will appear to the right with information corresponding to the menu item chosen.



Chapter 4 Figure 68: Menu Tab with Explorer Window

A. **Left Column**- Consists solely of the **Back End Menu** pagelet.
B. **Right Column**- The right column, called the **Explorer Window,** appears when the desired item from the **Back End** Menu is selected.

Menu options, and their corresponding explorer windows, are discussed in further detail in the following subsections.

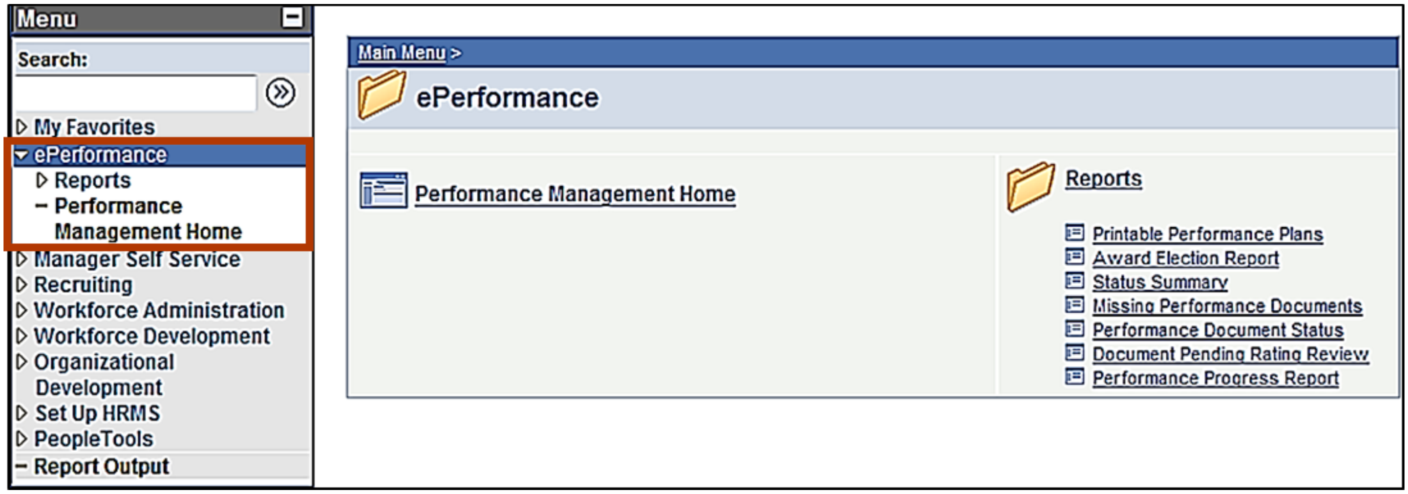
MY FAVORITES

The **My Favorites** menu provides access to the My Favorites bookmarking tool, as well as a list of links to pages you've previously bookmarked.

Chapter 4 Figure 69: Back-End Menu

EPERFORMANCE

The **ePerformance** menu provides access to performance related documents and reports.



Chapter 4 Figure 70: ePerformance Menu Explorer Window

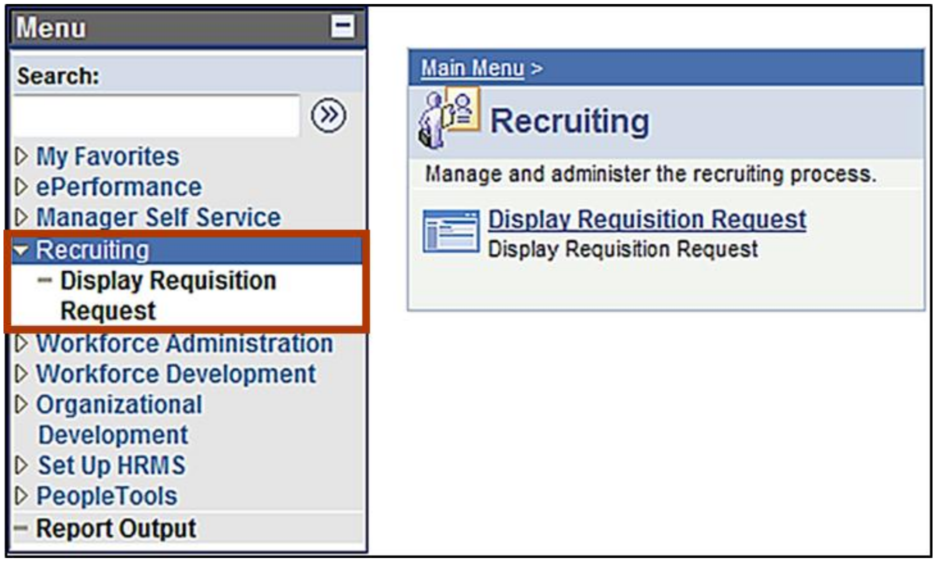
MANAGER SELF SERVICE

The **Manager Self Service** menu allows managers to access tools to manage their proxies and workflow.

Chapter 4 Figure 71: Manager Self Service (MSS) Menu Explorer Window

Recruiting

The **Recruiting** menu allows users with the appropriate roles to manage and administer the recruiting process.



Chapter 4 Figure 72: Recruiting Menu Explorer Window

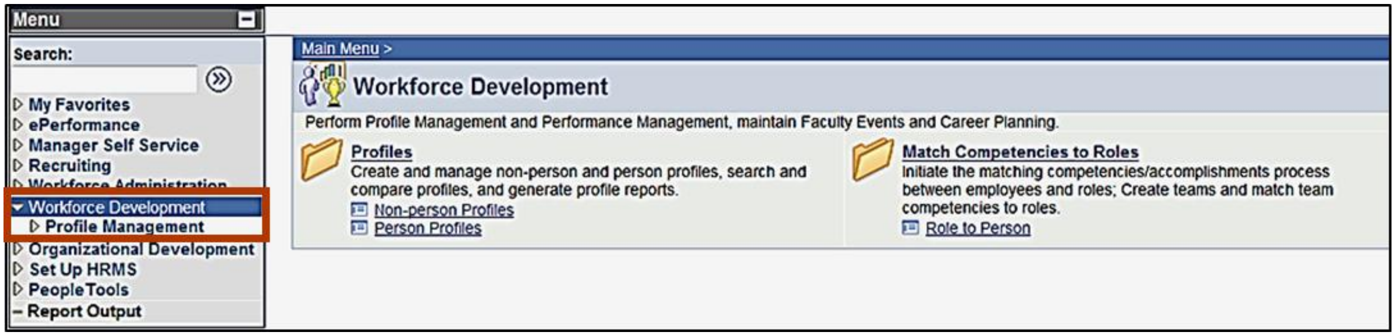
Workforce Administration

The **Workforce Administration** menu allows you to conduct personnel actions (e.g., hiring an employee, cancelling an action, etc.) and maintain personal and job data.

Chapter 4 Figure 73: Workforce Administration Menu Explorer Window

Workforce Development

The **Workforce Development** menu allows you to access personnel profiles and career planning tools.



Chapter 4 Figure 74: Workforce Development Menu Explorer Window

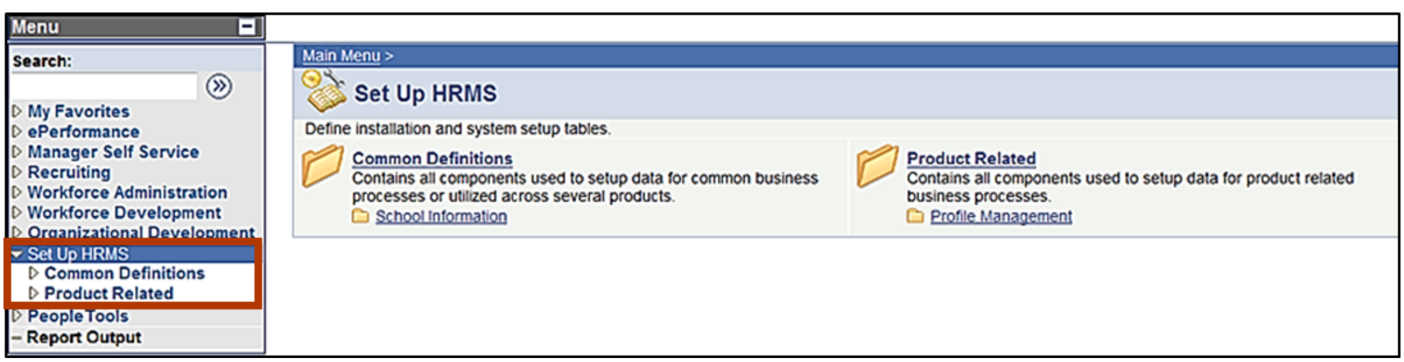
Organizational Development

The **Organizational Development** menu allows you to conduct and process personnel actions, maintain a succession planning system, and take advantage of position management information.

Chapter 4 Figure 75: Organizational Development Menu Explorer Window

Set Up HRMS

The **Set Up HRMS** menu allows users to add and maintain account codes, department IDs and work locations.



Chapter 4 Figure 76: Set Up HRMS Menu Explorer Window

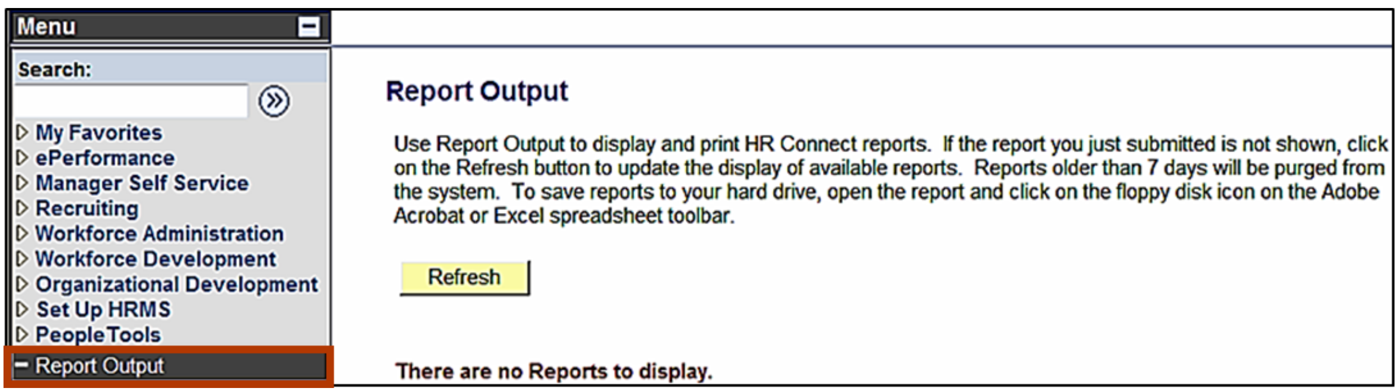
People Tools

The **People Tools** menu allows users to monitor the progress of their reports posting to their report output tab."

Chapter 4 Figure 77: People Tools Menu Explorer Window

Report Output

The **Report Output** menu allows users to display and print HR Connect Reports. This functionality is similar to that in the **Report Output** tab.



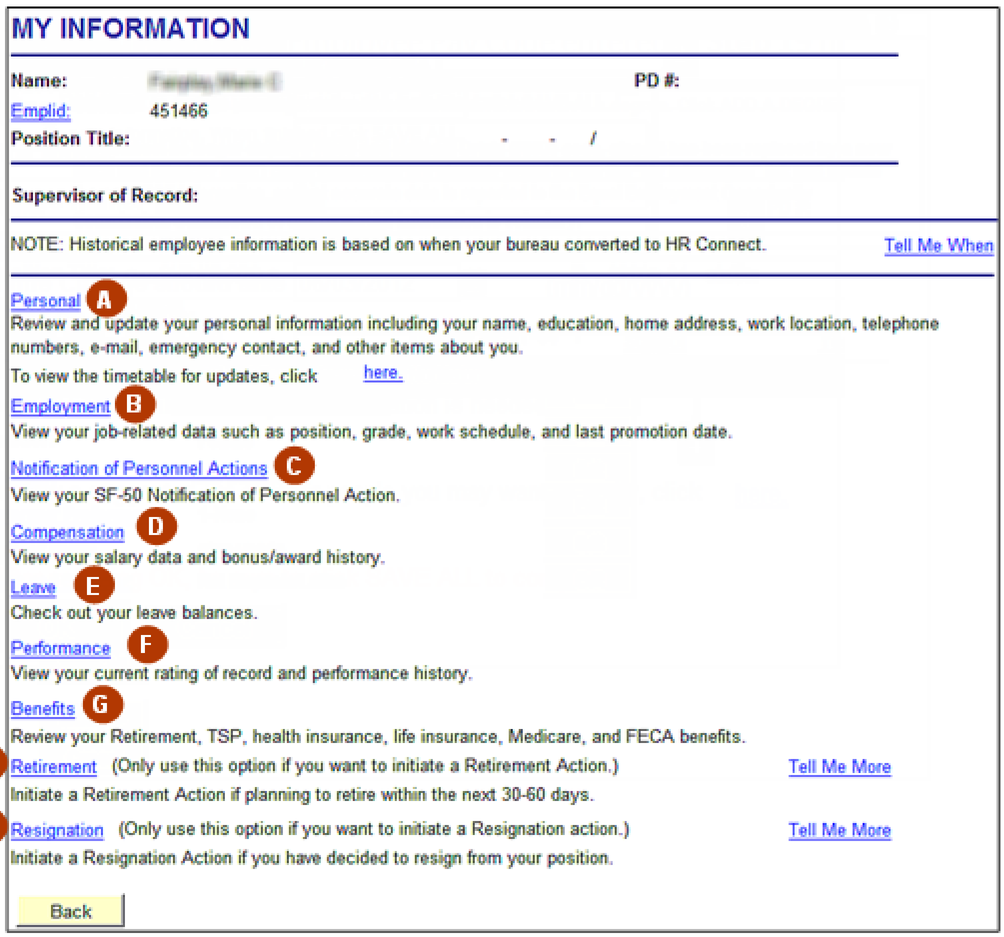
Chapter 4 Figure 78: Report Output Menu

CHAPTER 5: EMPLOYEE SELF SERVICE (ESS)

Chapter 5 Figure 79: Employee Home Page

The **My Information** page can be used to review and modify personal information. Follow the path below to access **My Information** page.

Employee tab> About Me pagelet> My Information link>My Information page



Chapter 5 Figure 80: My Information

A. Personal- View or update information concerning your education, work location, contact information, etc.

B. Employment- View information concerning your position (e.g., Work Schedule, Duty Hours, etc.) and work history (e.g., Years of Service, Last Equivalent Increase, etc.).
C. Notification of Personnel Actions- View your SF-50 Notifications.
D. Compensation- View your salary data and bonus/award history.
E. Leave- View your leave and compensatory time balances.
F. Performance- View your current rating of record and performance history.
G. Benefits- View your retirement, TSP, life and health insurance, Medicare, and FECA benefit information.
H. Retirement-Initiate a Retirement Action if you plan to retire in the next 30-60 days.
I. Resignation- Initiate a Resignation Action to resign from your current position.

The following sections will explore actions conducted via the **A. Personal**, **C. Notification of Personnel Actions**, **H. Retirement**, and **I. Resignation** links.

5.1 Modifying/Reviewing Personal Information

To review and/or modify your personal information select the **Personal** link on the **My Information** page. This takes you to the **My Information – Personal** page, which consists of 7 tabs: **Personal Data, Education**, **Address**, **Work Location**, **Phone/E-mail**, **Emergency Contact Information**, and **Job Related Skills**. These tabs will be discussed below in order of appearance from left to right.

> **Note:** Not all steps are required in the walkthroughs provided in this section, though it is recommended that you provide as much information as possible. Any step that is optional will be marked.

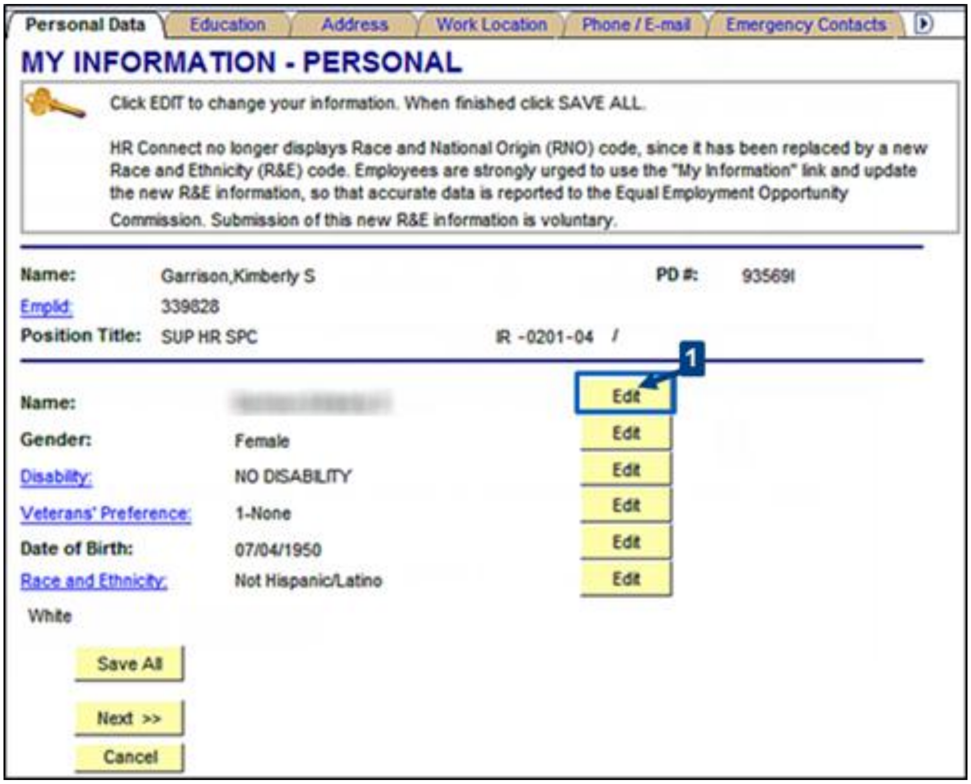
Personal Data Tab

Employee tab>About Me pagelet>My Information link>Personal link>Personal Data tab

To initiate any change action, select the **Edit** button next to the item that you would like to modify. While the example below involves submitting a name change request, the steps involved are similar for all information on the Personal Data tab. While the majority of Change Requests will immediately result in a change of personal data, changes to your name or veterans preference require HR processing before taking effect.

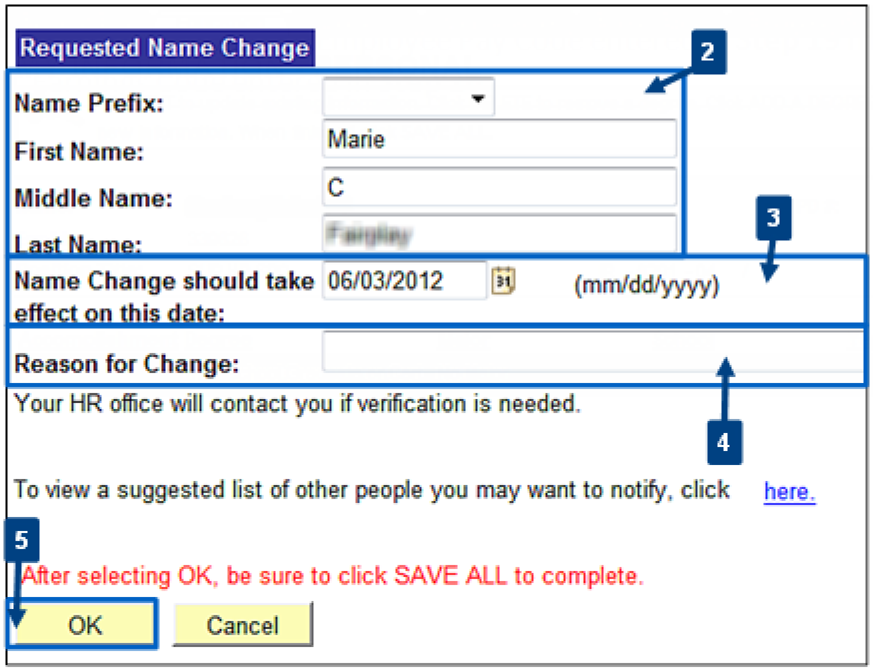
To change your personal data in HR Connect:

1. Select the **Edit** button.



Chapter 5 Figure 81: My Information – Personal

2. On the My Information – Update Name page, enter or select changes to your **Name**.
3. Enter the **Effective Date**. This is the day upon which your name change will be effective in the system.
4. (Optional): Identify the **Reason for Change**.
5. Select the **OK** button. (This will take you to the **Personal Data** tab.)



Chapter 5 Figure 82: My Information – Update Name

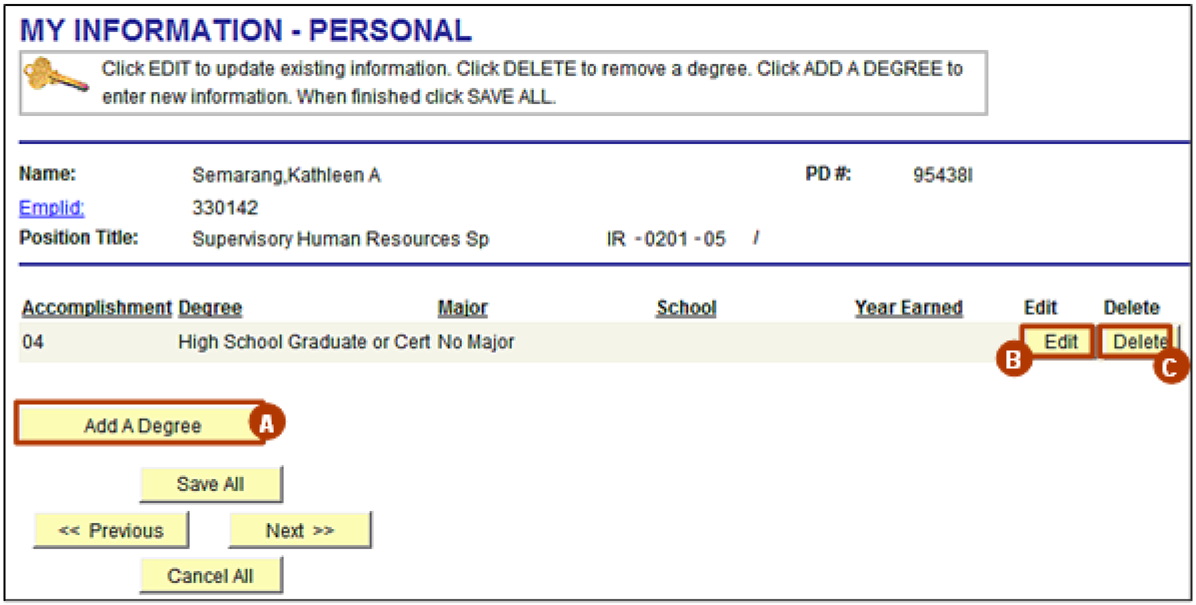
Caution! Selecting **OK** will not save your work or submit your change for processing. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

6. On the **Personal Data** tab, select the **Save All** button.
7. On the Confirmation page, select the **OK** button.
8. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

THE EDUCATION TAB

Employee tab>About Me pagelet>My Information link>Personal link>Education tab

The Education tab allows you to Add, Edit, or Delete a Degree.



Chapter 5 Figure 83: Education Tab

A. **Add A Degree**- Add a new degree to your account.
B. **Edit**- Update or otherwise alter an existing degree.
C. **Delete**- Remove an existing degree from your account.

ADDING A DEGREE

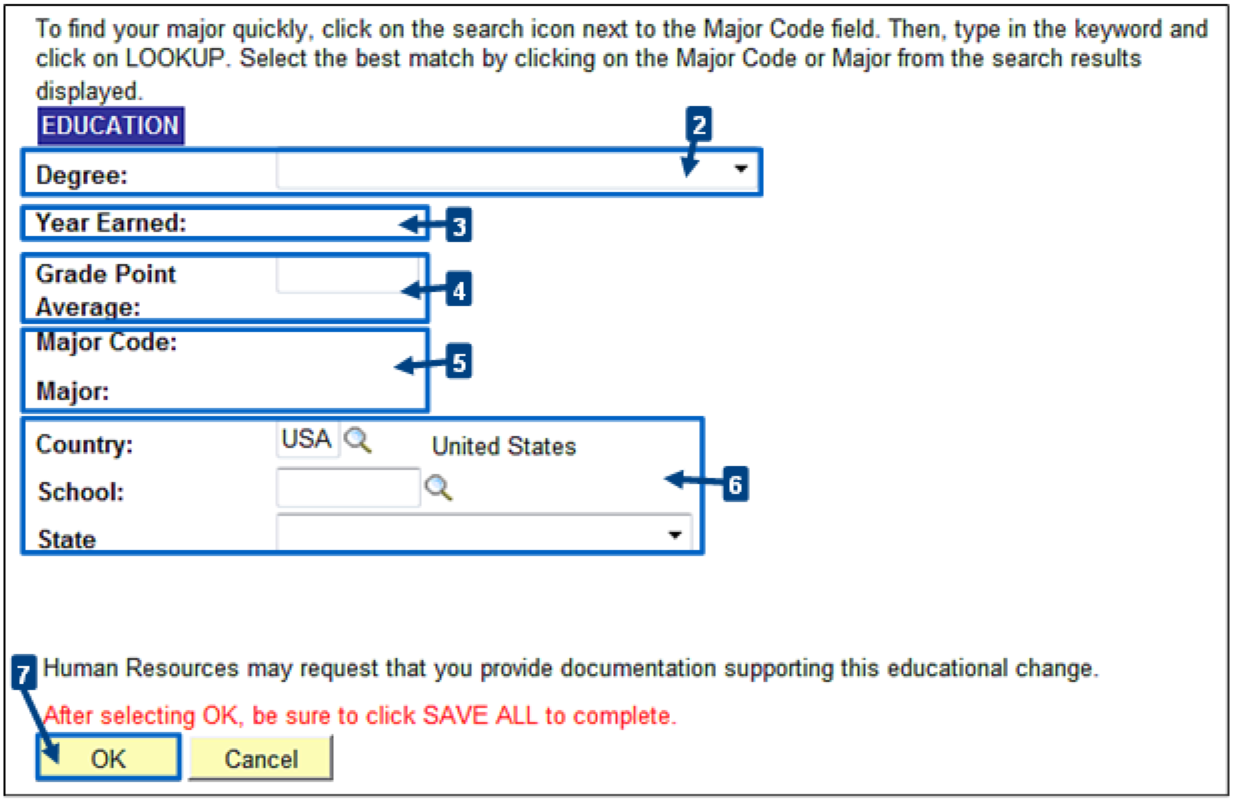
Employee tab>About Me pagelet>My Information link>Personal link>Education tab

To add academic information:

1. Select the **Add a Degree** button.
2. On the **My Information– Update Education** page, select a **Degree** from the dropdown menu.
3. (Optional): Enter the year you earned the degree in the **Year Earned** field.
4. (Optional): Enter the cumulative **Grade Point Average**.
5. (Optional): Enter the **Major Code** associated with your degree using the field provided.

Note: The **Major** field is automatically populated to correspond to the Major Code chosen in Step 6.

6. (Optional): Enter the **Country**, **School**, and **State** in which the degree was earned.
7. Select the **OK** button.



Chapter 5 Figure 84: Add a Degree Form

Caution! Selecting **OK** will not save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

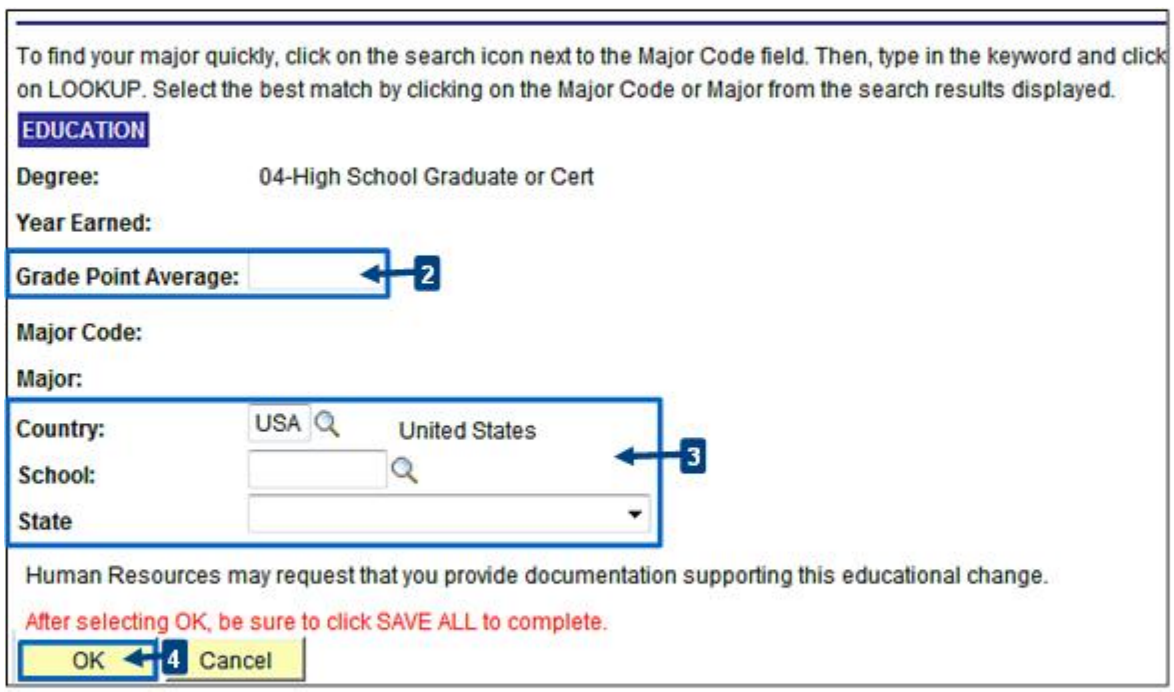
8. On the **Education** tab, select the **Save All** button.
9. On the confirmation page, select the **OK** button.
10. Select the **OK** button in the **Message Window**. The message will disappear and you will remain on the **My Information** page.

EDITING A DEGREE

Employee tab>About Me pagelet>My Information link>Personal link>Education tab

Once a degree has been assigned to your account, you will have the ability to modify certain information associated with that degree.

1. Select the **Edit** button next to the degree to be edited. This will take you to the **My Information – Update Education** page.
2. On the **Update Education** page, you can update your **Grade Point Average** by modifying or entering the correct GPA in the field provided.
3. To update where you earned your degree, enter or modify the information in the **Country**, **School**, and **State** fields
4. Select the **OK** button. (This will take you to the **Education** tab.)



Chapter 5 Figure 85: Edit a Degree Form

Caution! Selecting **OK** will not save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

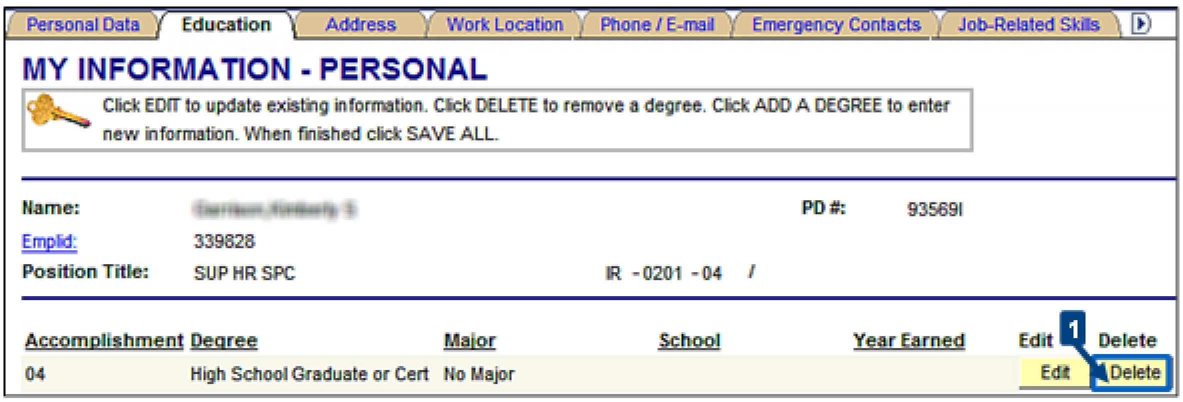
5. On the **Education** tab, select the **Save All** button.
6. On the confirmation page, select the **OK** button.
7. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Deleting a Degree

Employee tab>About Me pagelet>My Information link>Personal link>Education tab

Once a degree has been assigned to your account, you will have the ability to modify that information. Certain information is not, however, modifiable (e.g., **Degree**, **Year**, and **Major**).In such a case where unalterable information is incorrect, you may delete the entry.

1. Select the **Delete** button next to the degree. (This will take you to the **Delete** Confirmation page.)



Chapter 5 Figure 86: My Information- Personal For Deleting A Degree

2. Select the **Yes-Delete** button. (This will take you to the **Education** tab; where the degree is no longer listed.)

Caution! While it is no longer visible, this degree is still assigned to your account. To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

3. On the **Personal Data** tab, select the **Save All** button.
4. On the Confirmation page, select the **OK** button.
5. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

THE ADDRESS TAB

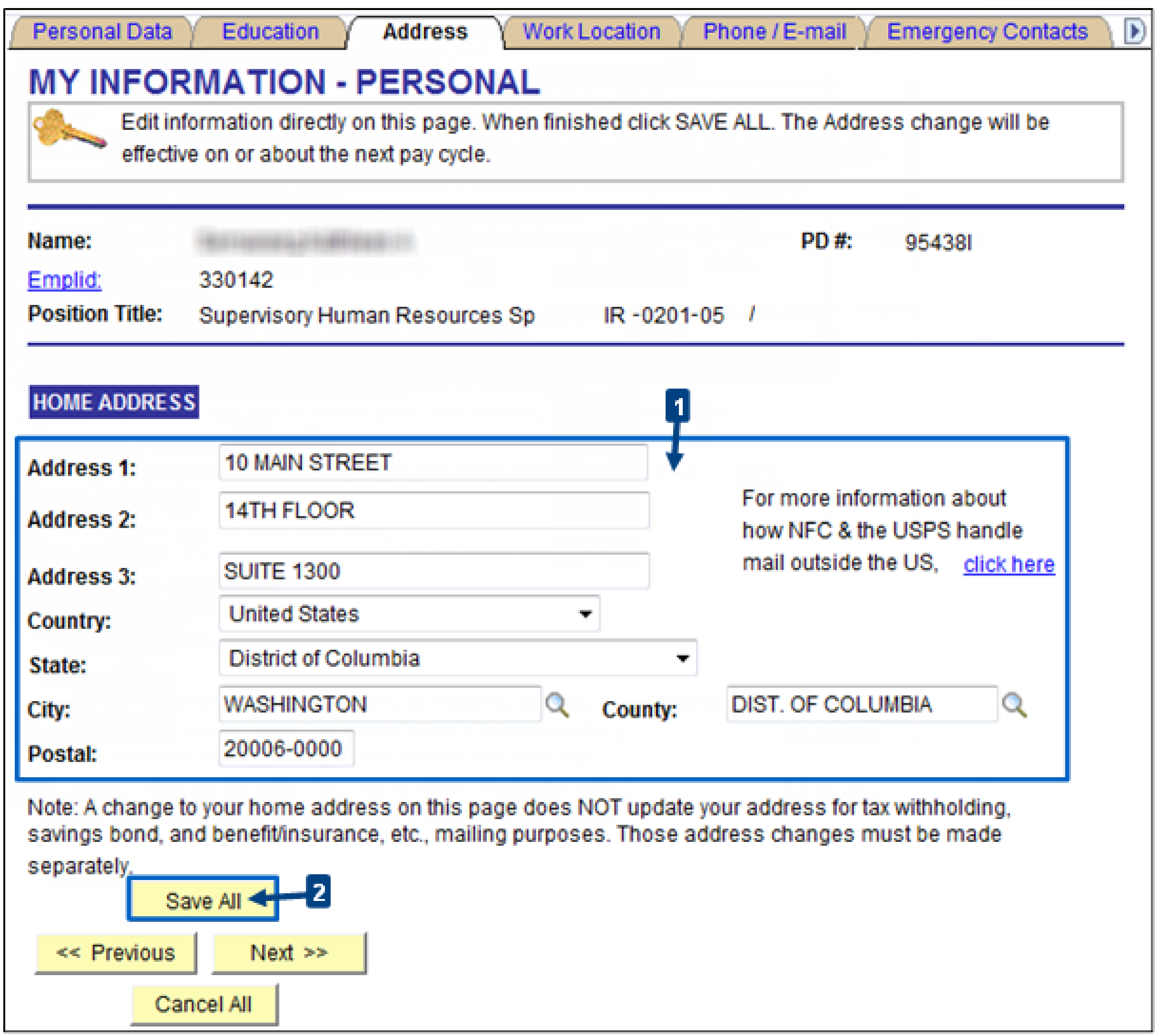
Employee tab>About Me pagelet>My Information link>Personal link>Address tab

The **Address** tab allows the viewing and editing of your primary residence address, as listed in HR Connect. On the **Address** tab, to update your home address:

1. Enter the correct information in the (**Address**, **Country**, **State**, **City**, and **Postal** code) fields provided.

Caution! The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

2. Select the **Save All** button.



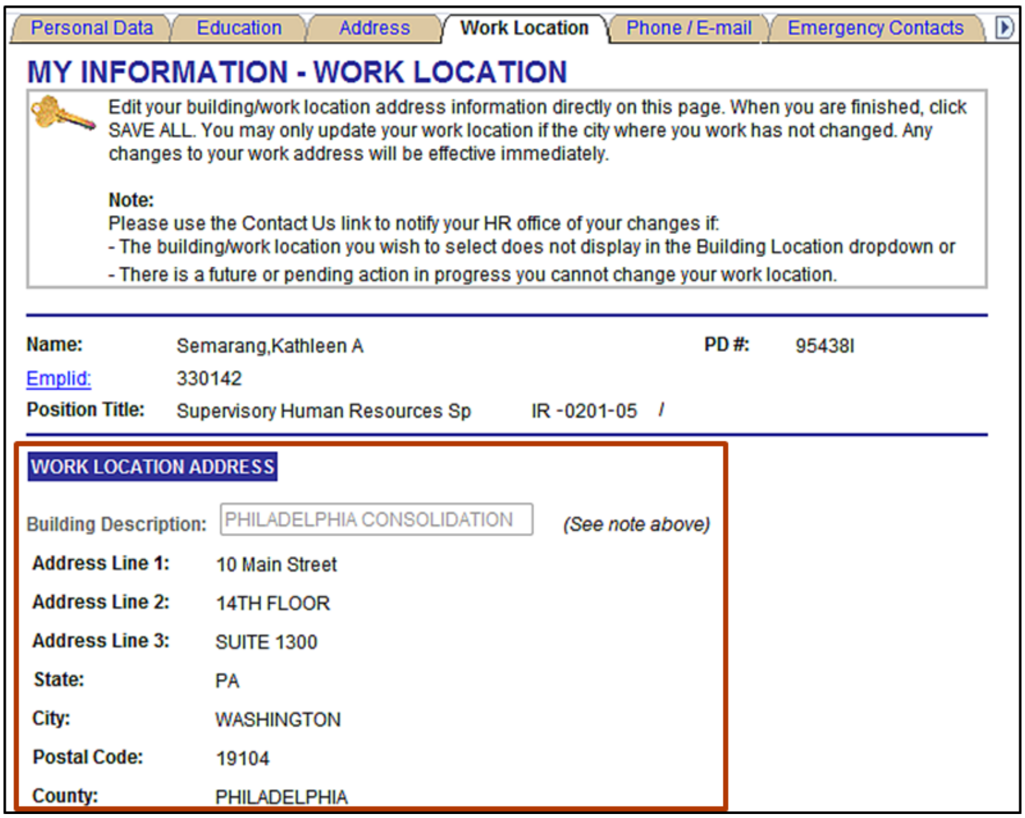
Chapter 5 Figure 87: Address Tab

3. On the confirmation page, select the **OK** button.
4. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

THE WORK LOCATION TAB

Employee tab>About Me pagelet>My Information link>Personal link>Work Location tab

Unlike other Personal Information, your Work Location cannot be modified in the front end of the system. This is tied to your position, and can only be altered by someone with access to MSS or HRSS functionality. The Work Location tab allows you to view, but not change, your Work Location Address.

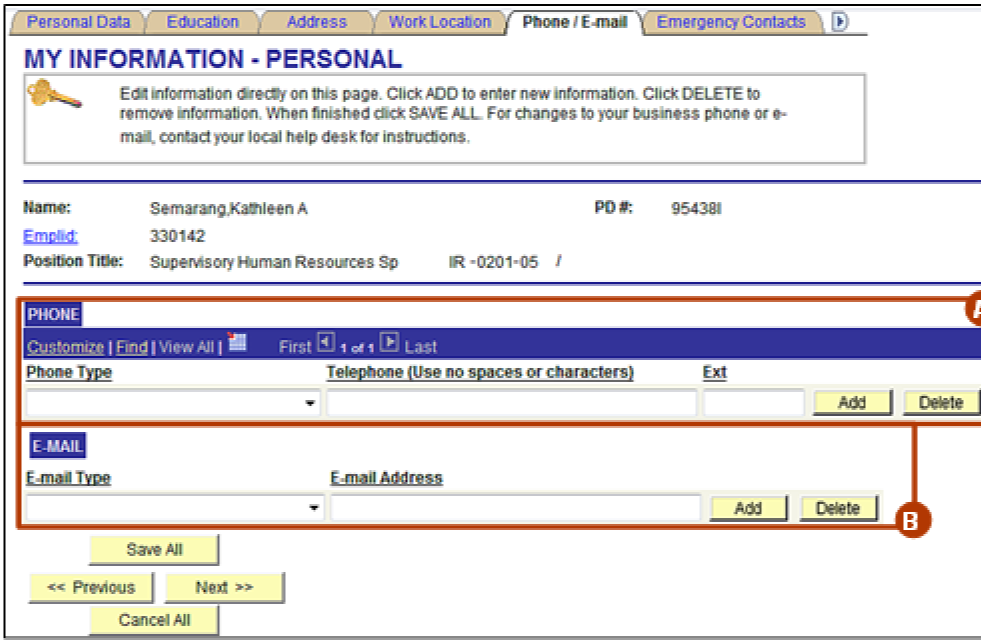


Chapter 5 Figure 88: Work Location Address Tab

The Phone/E-mail Tab

Employee tab>About Me pagelet>My Information link>Personal link>Phone/E-mail tab

The **Phone/E-Mail** tab allows you to add or remove phone numbers and e-mail addresses from your HR Connect account.



Chapter 5 Figure 89: Phone/E-mail Tab

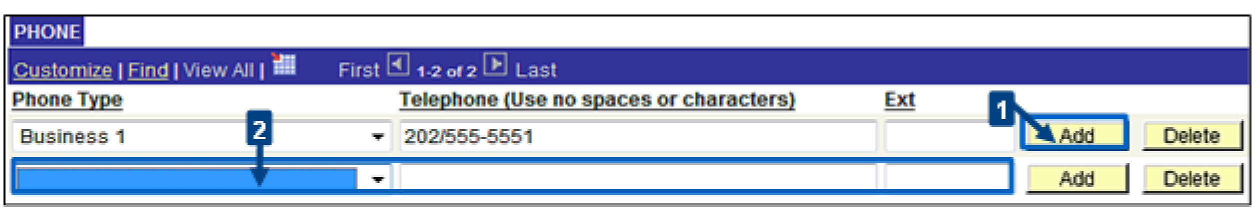
A. **Phone**- Add or remove phone information including phone type (e.g., Home, Business, etc.), phone number, and extension.
B. **E-mail**- Add or remove e-mail information including e-mail type (e.g., Home, Business, etc.) and e-mail address.

Update Phone/E-mail Information

Employee tab>About Me pagelet>My Information link>Personal link>Phone/E-mail tab

While this tab contains separate pagelets for phone and e-mail information, the following process is the same for making changes in either pagelet. To update your phone or e-mail information:

1. Select the **Add** button to add a new row.
2. Enter your **Phone** (or **E-mail**) information.



Chapter 5 Figure 90: Phone Information – Row Added

Note: While Business is an available option for e-mails, business e-mails are updated from your organization's official directory. You are unable to

Add a business e-mail via this method. To add or change your business e-mail, contact your local helpdesk.

Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

3. On the **Phone/Email** tab, select the **Save All** button.
4. On the Confirmation page, select the **OK** button.
5. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Remove Phone/E-Mail Information

Employee tab>About Me pagelet>My Information link>Personal link>Phone/E-mail tab

1. Select the **Delete** button across from the phone number or e-mail address to be removed. This will generate a **Confirmation Message**.
2. In the **Confirmation Message** pop-up, select the **OK** button. After doing so, the Phone/E-mail tab will refresh.

Note: The phone number (or e-mail) is no longer listed.

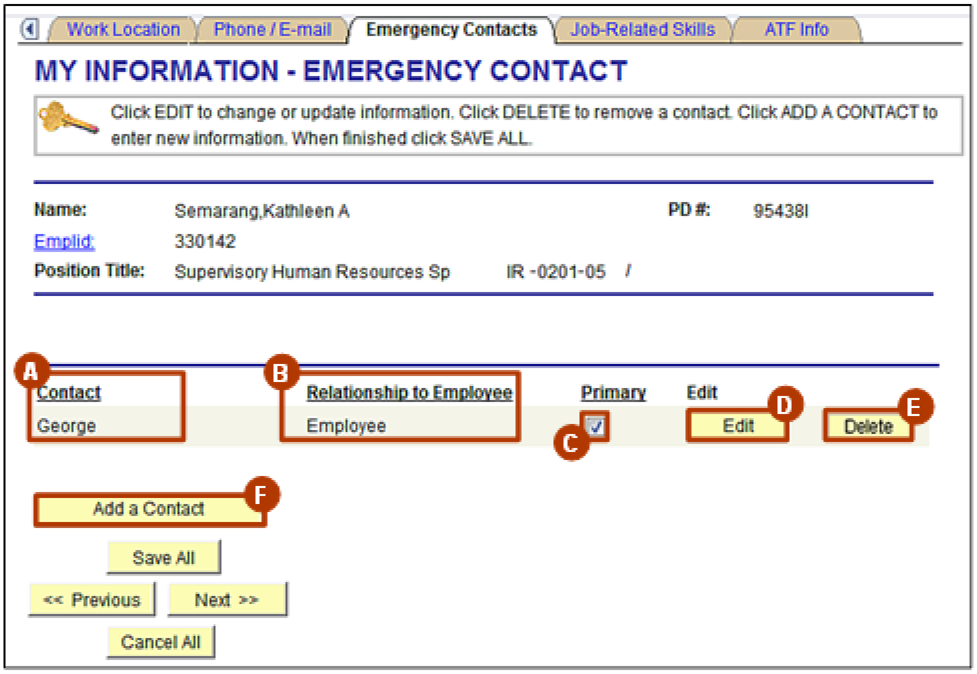
Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

3. On the **Phone/Email** tab, select the **Save All** button.
4. On the Confirmation page, select the **OK** button.
5. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Emergency Contacts

Employee tab>About Me pagelet>My Information link>Personal link>Emergency Contacts tab

The **Emergency Contacts** tab allows you to add, edit, or remove your emergency contacts in HR Connect.



Chapter 5 Figure 91: Emergency Contacts Tab

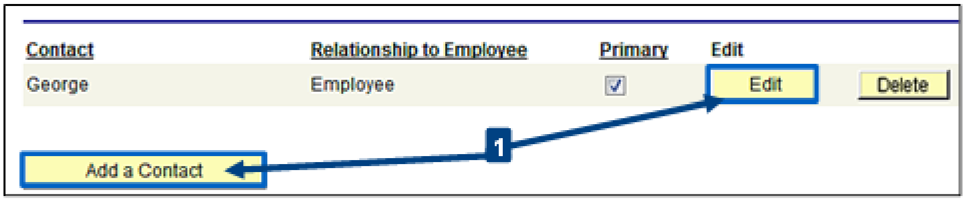
A. **Contact**- View the names of your existing emergency contact(s).
B. **Relationship to Employee**- View your relationship with the emergency contact.
C. **Primary**- Identify the primary emergency contact.
D. **Edit**- Modify existing contact information.
E. **Delete**- Remove existing contact information.
F. **Add a Contact**- Add a new emergency contact.

Adding/Editing an Emergency Contact

Employee tab>About Me pagelet>My Information link>Personal link>Emergency Contacts tab

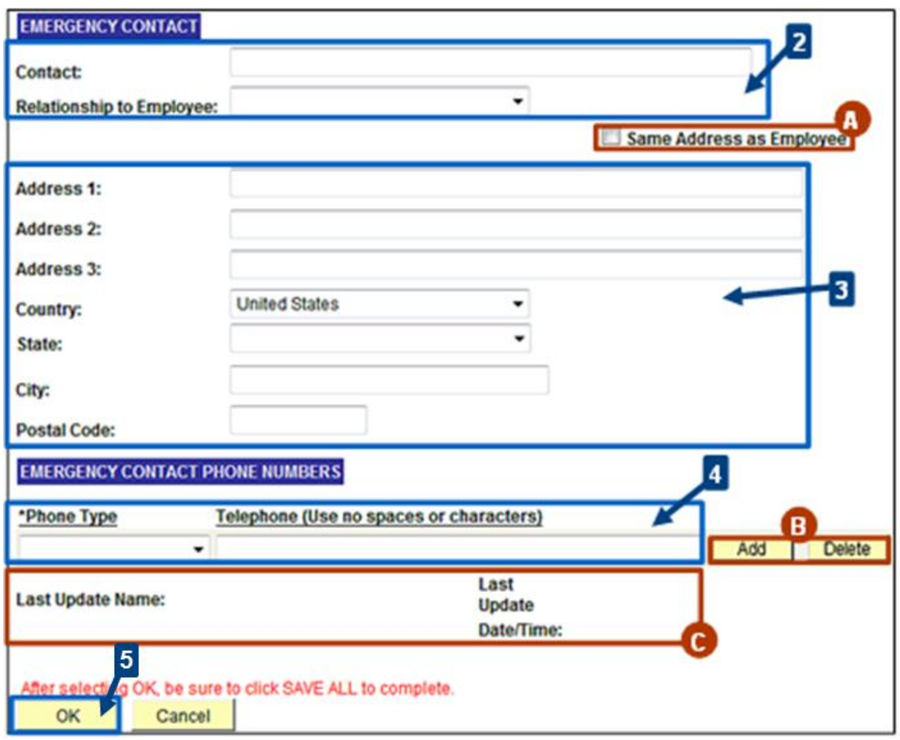
The steps below focus on adding a new contact. The information provided below can also be used to edit a contact.

1. To add a new contact, select the **Add a Contact** button. (To edit an existing contact, select the **Edit** button instead.)



Chapter 5 Figure 92: Emergency Contact Information

2. On the **Update Emergency Contact** page, enter or select the desired information for the **Contact field** and **Relationship to Employee** dropdown menu.
3. Enter the mailing **Address** of the contact in the fields provided.
4. Enter the contact's **Telephone** information in the fields provided.
5. Select the **OK** button. (This will take you back to the **Emergency Contacts** tab.)



Chapter 5 Figure 93: Emergency Contact Information Form

A. If you are at the same address as this Emergency Contact, you may automatically enter your address into Step 3 by selecting the **Same Address as Employee** checkbox.

B. If necessary, you may **Add** multiple phone numbers or **Delete** an existing phone number.
C. You may review the **Last Update Name** and **Last Update Date/Time**.

Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

6. On the **Emergency Contacts** tab, select the **Save All** button.
7. On the Confirmation page, select the **OK** button.
8. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Deleting an Existing Emergency Contact

Employee tab>About Me pagelet>My Information link>Personal link>Emergency Contacts tab

1. Select the **Delete** button.
2. In the pop-up message, select the **OK** button. (After selecting the **OK** button, the **Emergency Contact** tab refreshes; the contact is no longer listed.)

Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

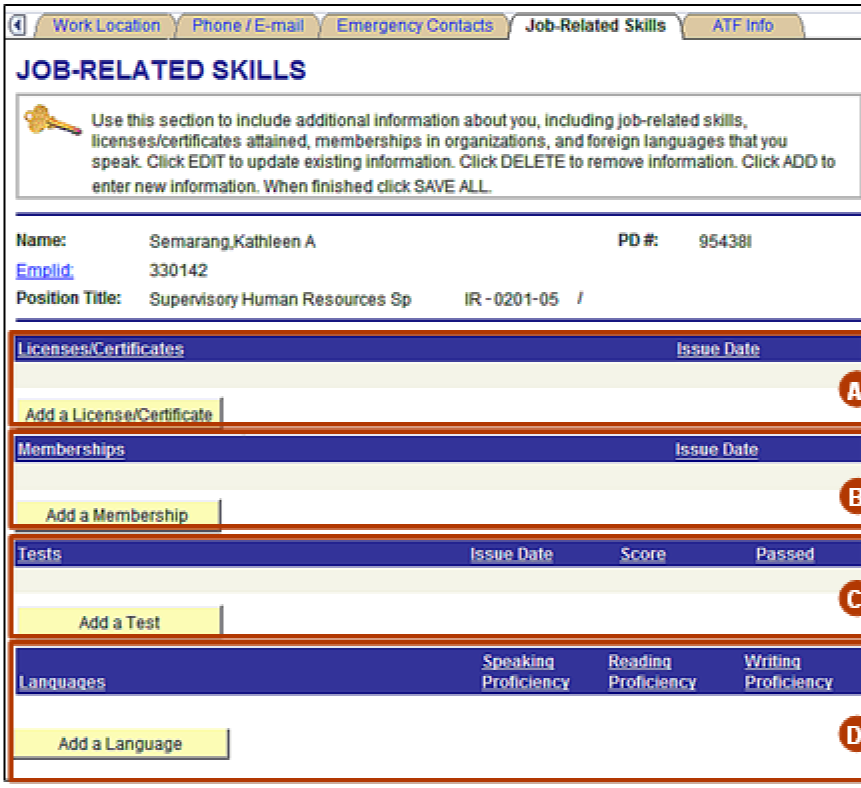
3. On the **Emergency Contacts** tab, select the **Save All** button.
4. On the Confirmation page, select the **OK** button.
5. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Job-Related Skills

Employee tab>About Me pagelet>My Information link>Personal link>Job-Related Skills tab

The **Job-Related Skills** tab allows you to add and/or edit information pertaining to certifications, memberships, test scores, and language proficiencies you have earned.

Note: To access the Job Related Skills tab, select the Tab Advance arrow.



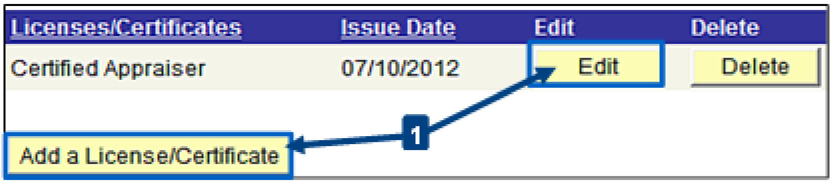
Chapter 5 Figure 94: Job-Related Skills Tab

A. **Licenses/Certificates**- Allows you to add and/or view the name and issuance date of any Licenses/Certificates assigned to your account.
B. **Memberships**- Allows you to add and/or view the name and issuance date of any Memberships assigned to your account.
C. **Tests**- Allows you to add and/or view the name, issuance date, and outcome (score and whether or not you passed) of any test assigned to your account.
D. **Languages**- Allows you to add and/or view the name and proficiency (speaking, reading, and writing) of any language assigned to your account.

Add/Edit a License/Certificate

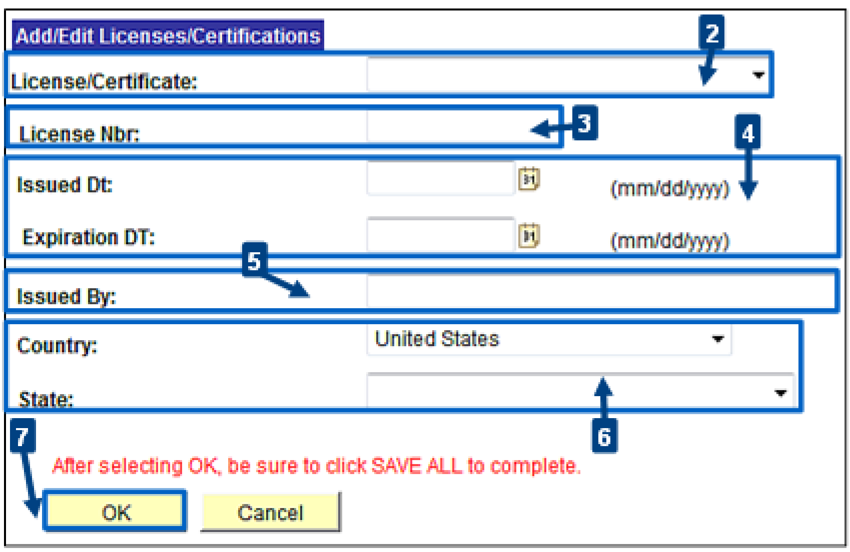
Employee tab>About Me pagelet>My Information link>Personal link>Job-Related Skills tab

1. Select the **Add a License/Certificate** button (or the **Edit** button associated with the license/certificate).



Chapter 5 Figure 95: Licenses/Certificates Information

2. On the Add/Edit Licenses/Certifications page, select the appropriate **License/Certificate** from the dropdown menu.
3. (Optional): Enter the number associated with your license in the **License Nbr** field.
4. Enter the license's/certificate's issuance date in the **Issued Dt** field (Optional: and expiration date in the **Expiration DT** field).
5. (Optional): Enter who the license/certificate was **Issued By** in the field provided.
6. (Optional): Enter where the license/certificate was issued in the **Country** and **State** fields.
7. Select the **OK** button.



Chapter 5 Figure 96: Add/Edit Licenses/Certifications Form

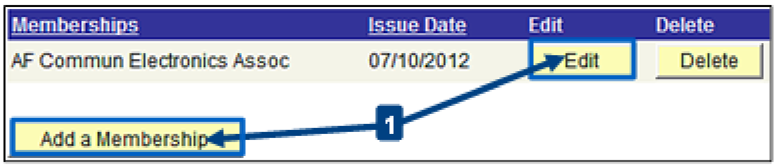
Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

8. On the **Job Related Skills** tab, select the **Save All** button.
9. On the Confirmation page, select the **OK** button.
10. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

ADD/EDIT A MEMBERSHIP

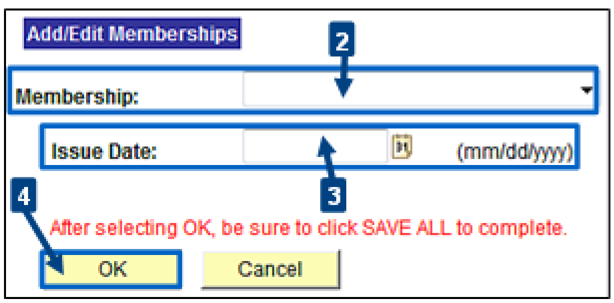
Employee tab>About Me pagelet>My Information link>Personal link>Job-Related Skills tab

1. Select the **Add a Membership** button (or the **Edit** button). This will take you to the **Add/Edit Memberships** page.



Chapter 5 Figure 97: Memberships Information

2. Select the appropriate **Membership** from the dropdown menu.
3. (Optional): Enter the date the membership was issued in the **Issued Date** field.
4. Select the **OK** button.



Chapter 5 Figure 98: Add/Edit Memberships Page

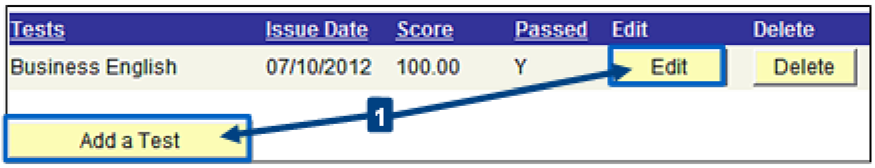
Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

5. On the **Job Related Skills** tab, select the **Save All** button.
6. On the Confirmation page, select the **OK** button.
7. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

ADD/EDIT A TEST

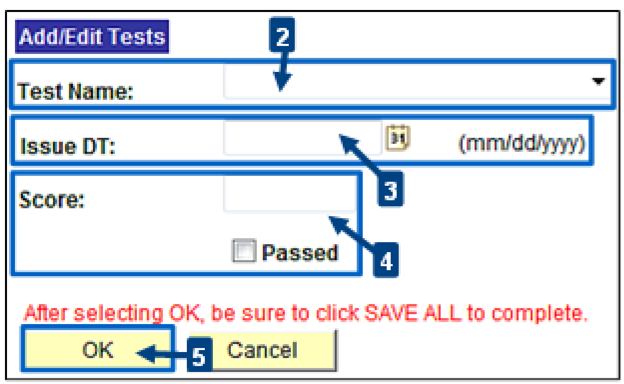
Employee tab>About Me pagelet>My Information link>Personal link>Job-Related Skills tab

1. Select the **Add a Test** button (or the **Edit** button associated with the test). This will take you to the **Add/Edit Tests** page.



Chapter 5 Figure 99: Tests Information

2. Select the appropriate **Test Name** from the dropdown menu provided.
3. (Optional): Enter the issuance date in the **Issue DT** field.
4. (Optional): Enter your test **Score** in the field provided and identify whether or not you **Passed** the test using the checkbox provided.
5. Select the **OK** button.



Chapter 5 Figure 100: Add/Edit Tests Page

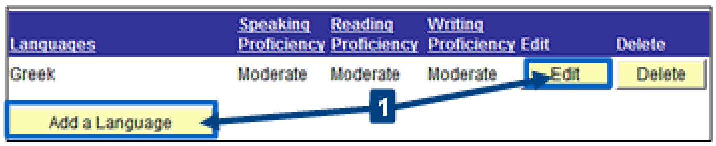
Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

6. On the **Job Related Skills** tab, select the **Save All** button.
7. On the Confirmation page, select the **OK** button.
8. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Add/Edit a Language

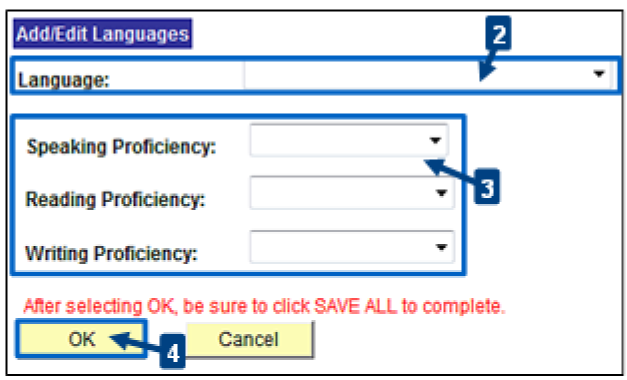
Employee tab>About Me pagelet>My Information link>Personal link>Job-Related Skills tab

1. Select the **Add a Language** button (or the **Edit** button associated with the language). Doing so will forward you to the **Add/Edit Languages** page:



Chapter 5 Figure 101: Languages Information

2. Select the appropriate **Language** from the dropdown menu provided.
3. (Optional): Select your **Speaking**, **Reading**, and **Writing Proficiencies** in the dropdown menus provided.
4. Select the **OK** button.



Chapter 5 Figure 102: Add/Edit Languages Page

Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

5. On the **Job Related Skills** tab, select the **Save All** button.
6. On the Confirmation page, select the **OK** button.
7. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

Deleting Job Related Skills

Employee tab>About Me pagelet>My Information link>Personal link>Job-Related Skills tab

In addition to adding and editing Licenses/Certifications, Memberships, Tests, and Languages, the Job Related Skills tab allows you to remove information from these pagelets. All Job Related Skills utilize the same steps for deletion.

1. Select the **Delete** button corresponding to the Job Related Skill you intend to remove. This will take you to the **Delete Confirmation** page.
2. On the **Delete Confirmation** page, select the **Yes Delete** button.After doing so, you will be returned to the **Job Related Skills** tab (where the Job Related Skill is no longer listed).

Caution! To complete this change, you will need to save your work. The following steps may be completed at any point, but must be completed before exiting the My Information-Personal section of HR Connect.

3. On the **Job Related Skills** tab, select the **Save All** button.
4. On the Confirmation page, select the **OK** button.
5. Select the **OK** button in the **Message Window**. (The message will disappear and you will remain on the **My Information** page.)

5.2 Reviewing SF-50 Notification of Personnel Actions

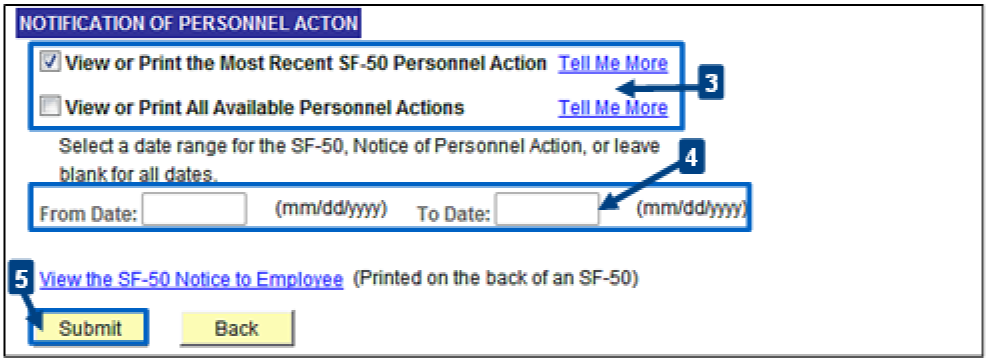
Employee tab>About Me pagelet>My Information link>My Information page

Via ESS, you may review personnel actions taken on your account by generating an SF-50 report. To generate an SF-50 report:

1. On the **My Information** page, select the **Notification of Personnel Actions** link.
2. On the confirmation page, select the **Cancel** button. (Alternatively, selecting **OK** will direct you to the **Report Output** page.)
3. On the **My Information – SF50 Notification of Personnel Action** page, select the **Print Most Recent**, or **Print All Available Personnel Actions**, check box.

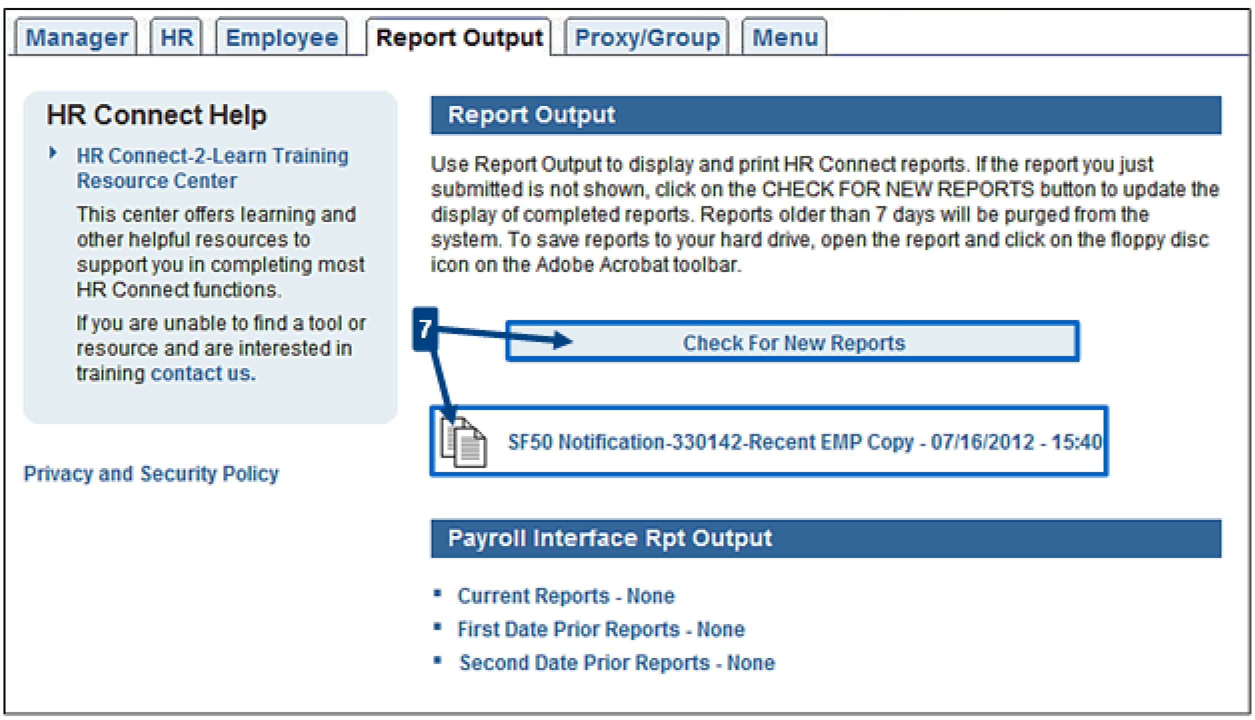
Note: If you select the **Print Most Recent SF-50 Personnel Action,** then skip to **Step 5**, as **Step 4** will not be available.

4. Enter a date range in **From Date** and **To Date** fields provided.
5. Select the **Submit** button.



Chapter 5 Figure 103: My Information – SF50 Notification of Personnel Action Page

6. On the **Report Manager** confirmation page, select the **OK** button. This will take you to the **Report Output** page.
7. Select the appropriate **SF50 Notification** report link (This will take you to the **Report Output** page; if this link does not appear, wait a minute and select the **Check For New Reports** button).



Chapter 5 Figure 104: Report Output Tab

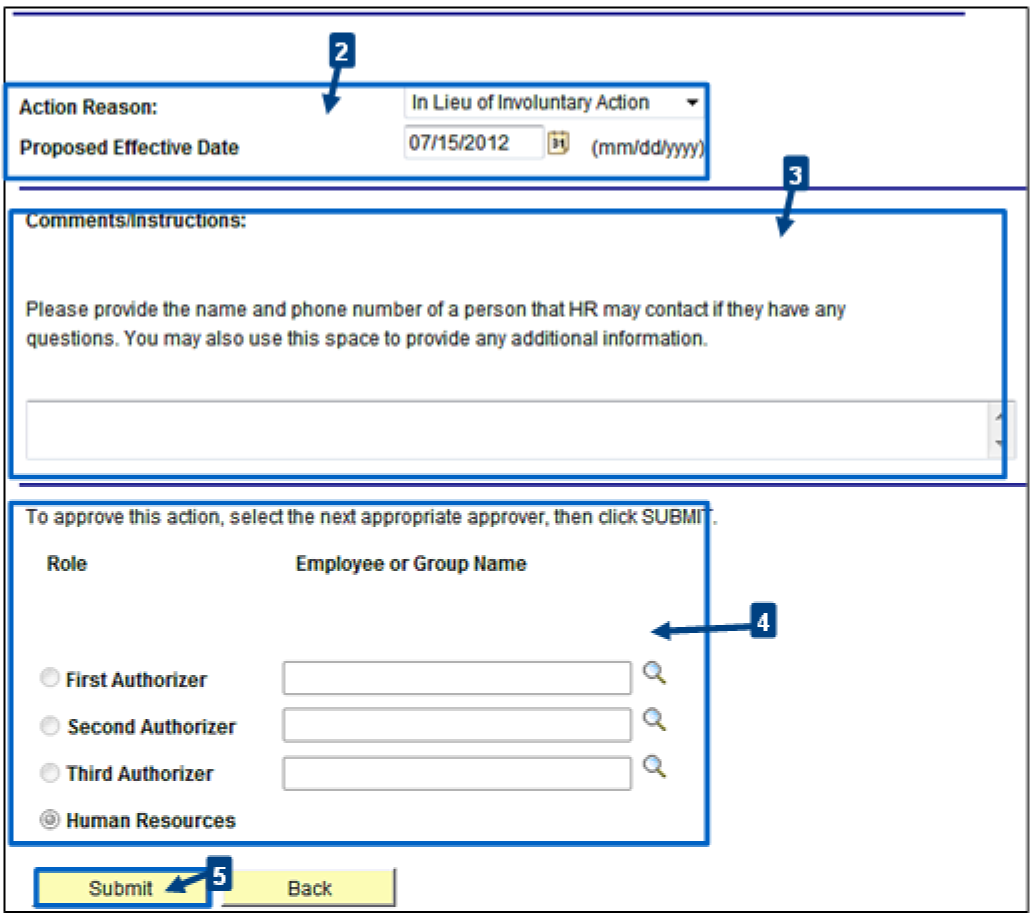
5.3 Initiating a Voluntary Separation

The process for initiating a voluntary separation is the same when the separation is the result of a retirement or a resignation. While the reasons behind such actions significantly differ, for the purposes of documentation they are interchangeable.

Initiating a Voluntary Separation

Employee tab>About Me pagelet>My Information link>My Information page

1. On the **My Information** page, select the **Retirement** link to initiate a retirement or the **Resignation** link to initiate a resignation. This will take you to the **Retirement** or **Resignation** page.
2. Select the appropriate **Action Reason** and **Proposed Effective Date** from the dropdown menu and date field provided.
3. If necessary, provide supplementary **Comments/Instructions** in the field provided**.**
4. If possible, specify an **Authorizer** (If you are unable to edit these fields, your action will be routed to Human Resources).
5. Select the **Submit** button. (This will take you to the **SEC Records Maintenance** page.)



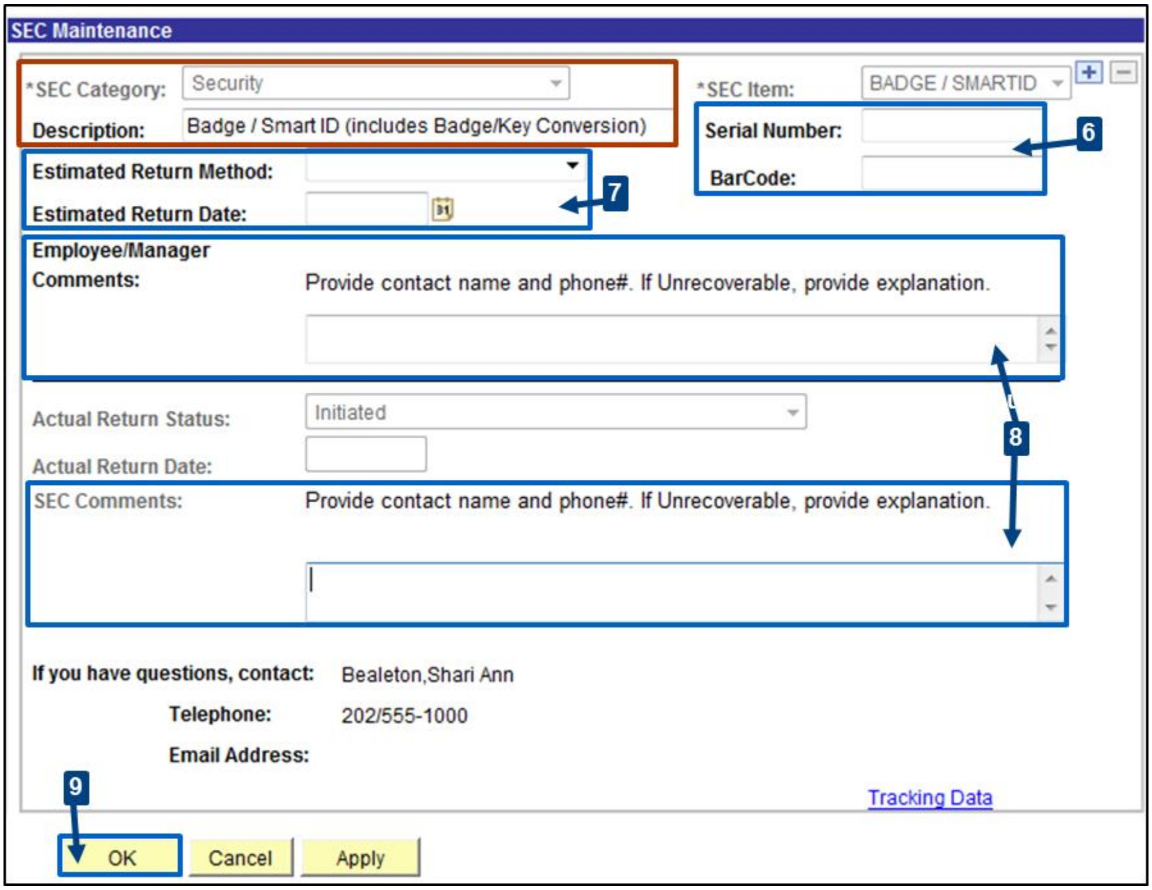
Chapter 5 Figure 105: Resignation or Retirement Page

SEC Records Maintenance

Employee tab>About Me pagelet>My Information link>My Information page>Retirement or Resignation link>Submit button>SEC Records Maintenance page

On the **SEC Records Maintenance** page you will see a list of items which need to be returned before you may complete your voluntary separation. Items are organized by **SEC Category** (e.g., Security, Information Technology, etc.) and are identified in the **Description** field.

6. Enter the items **Serial Number** and **Bar Code** in the fields provided.
7. Select the **Estimated Return Method** and **Date** in the dropdown menu and date field provided.
8. (Optional): Enter a comment in the**Employee/Manager Comments** and **SEC Comments** fields provided (e.g., why you are unable to return the item).
9. Select the **OK** button. (This will produce a confirmation message and will take you back to your home tab.)



Chapter 5 Figure 106: SEC Records Maintenance Page

CHAPTER 6: MANAGER SELF SERVICE (MSS)

6.1 MANAGER SELF SERVICE

Managers and their proxies can initiate a variety of actions, and perform a variety of functions from the Manager Tab. These include Personnel Action Requests (PAR's), Human Resource Actions, and other processes which relate to setting up or using particular functions. These processes include:

- Setting up workflows
- Picking a proxy
- Using the People and Positions pagelet

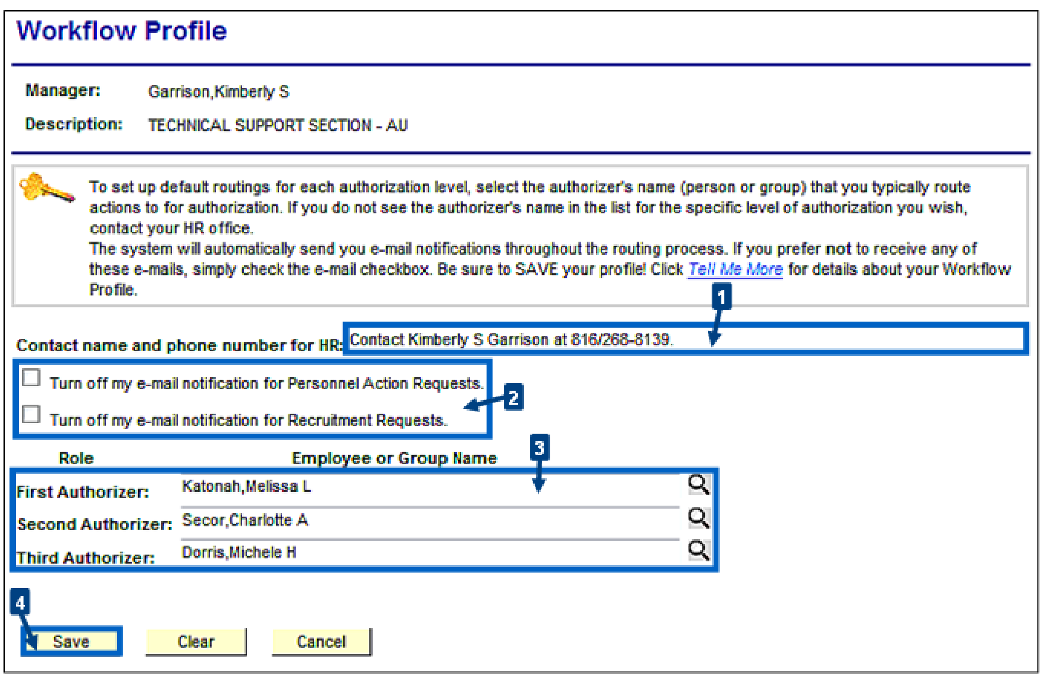
WORKFLOW

HR Connect includes the functionality to create a workflow, and manage the routing of actions within your organization.

SETTING UP A WORKFLOW PROFILE

Manager tab>Profiles and Proxies pagelet>Workflow Profile link>Workflow Profile page

1. Enter the name and office phone number in the **Contact name and phone number for HR** field for the individual who can be contacted by HR should there be questions about the action.
2. Select **E-mail Notification** preferences.
3. Enter the names of **Authorizers**.
4. Select the **Save** button.



Chapter 6 Figure 107: Workflow Profile Page

Pick a Proxy

Managers can designate an individual to carry out administrative actions on their behalf. This can be temporary while that manager is away from the office, or on a semi-permanent basis, at the discretion of the manager.

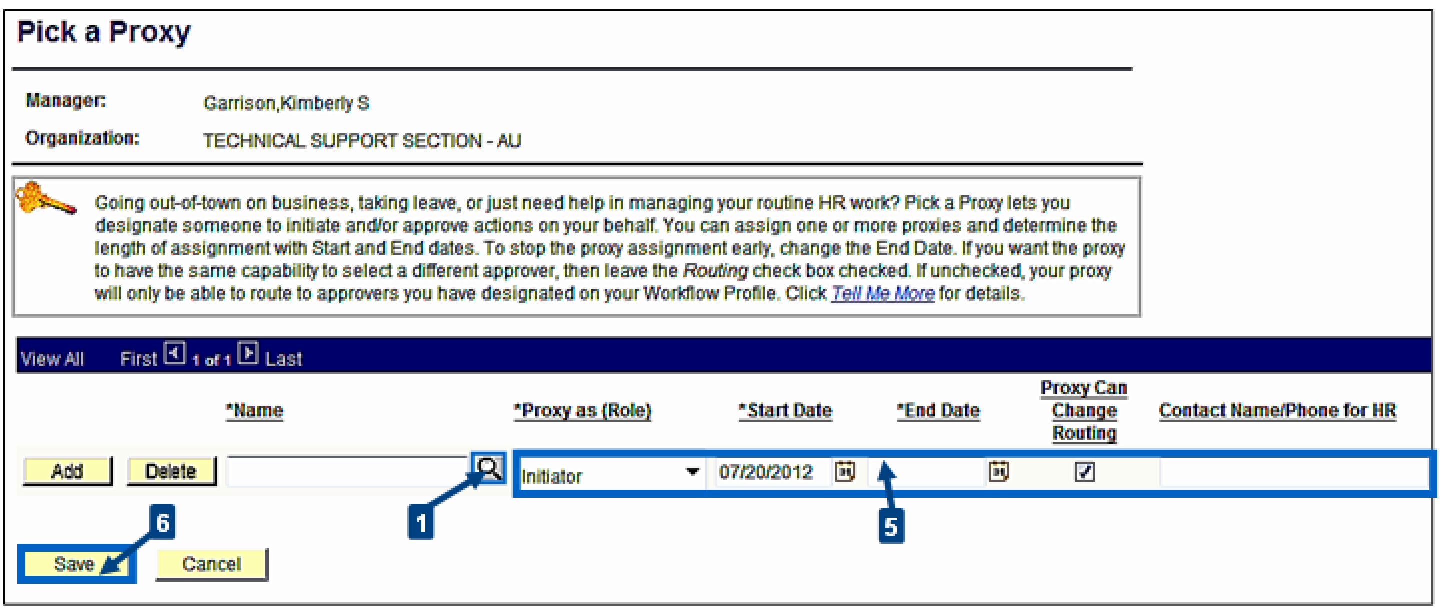
Setting Up a Proxy

Manager tab>Profiles and Proxies pagelet>Pick a Proxy link>Pick a Proxy page

1. Select the **Proxy** lookup.
2. On the **Proxy Lookup** page, enter the proxy **Name** and **Organization** information in the fields provided.
3. Select the **Search** button.
4. Select your proxy from the search results. This will take you back to the **Pick a Proxy** page.
5. On the **Pick a Proxy** screen, specify the **Role**, **Start** and **End Date**, **Routing Privelege**, and Contact Information for the proxy.

> **Note:** The Proxy Can Change Routing checkbox should always be selected as the proxy takes on the workflow profile of the manager. This will ensure that the Proxy will be able to change the routing so that the correct authorizers approve the action.

6. Select the **Save** button. This will take you to the **Pick a Proxy Notification** screen.
7. Select the **Close** button.

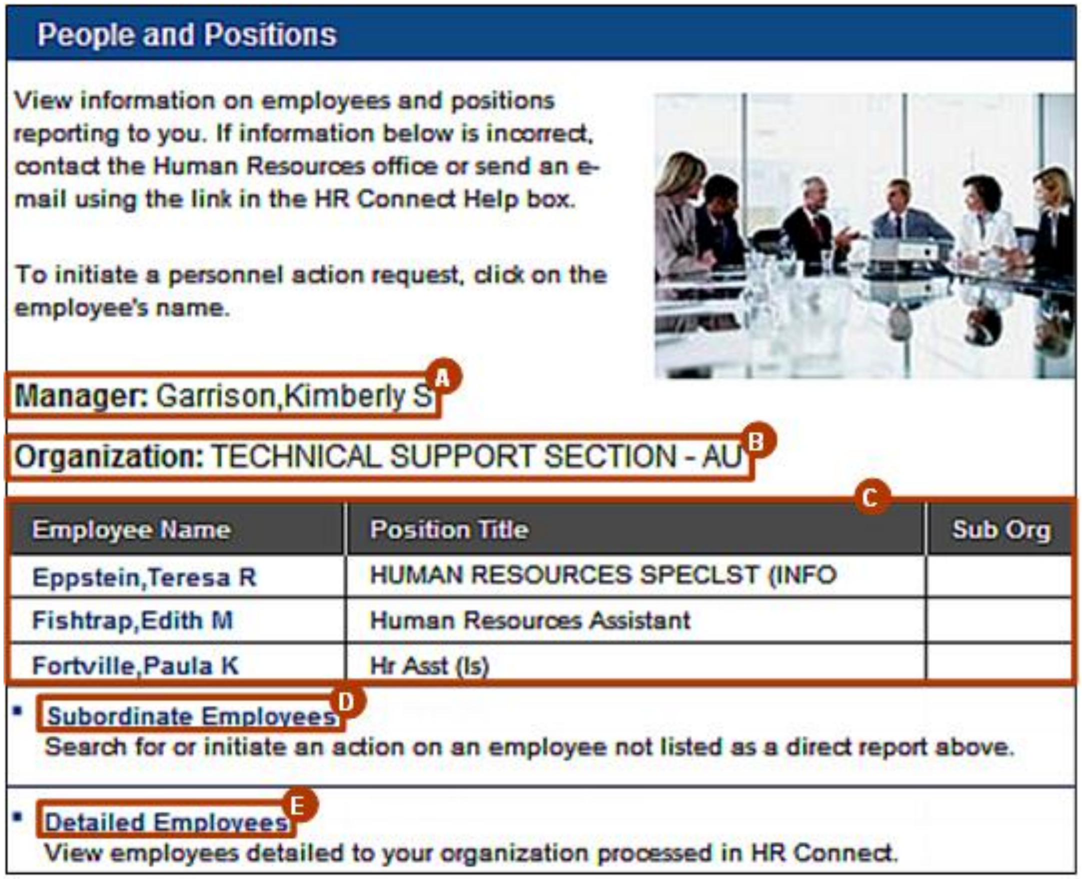


Chapter 6 Figure 108: Pick A Proxy Screen

People & Positions

The **People and Positions** pagelet allows managers to view information relating to employees and positions who report to them. This includes employees who report directly to that manager, the subordinates of that employee, and employees who have been detailed to that manager.

Manager tab>People and Positions pagelet



Chapter 6 Figure 109: People & Positions Pagelet

A. **Manager**- Your name.
B. **Organization**- The organization in which you work.
C. **Employee Table**- A list of employees who report directly to you.
D. **Subordinate Employees**- Employee information for an individual who reports indirectly to you.
E. **Detailed Employees**- Employee information for an individual who has been detailed to your organization.

VIEW AN EMPLOYEE'S INFORMATION

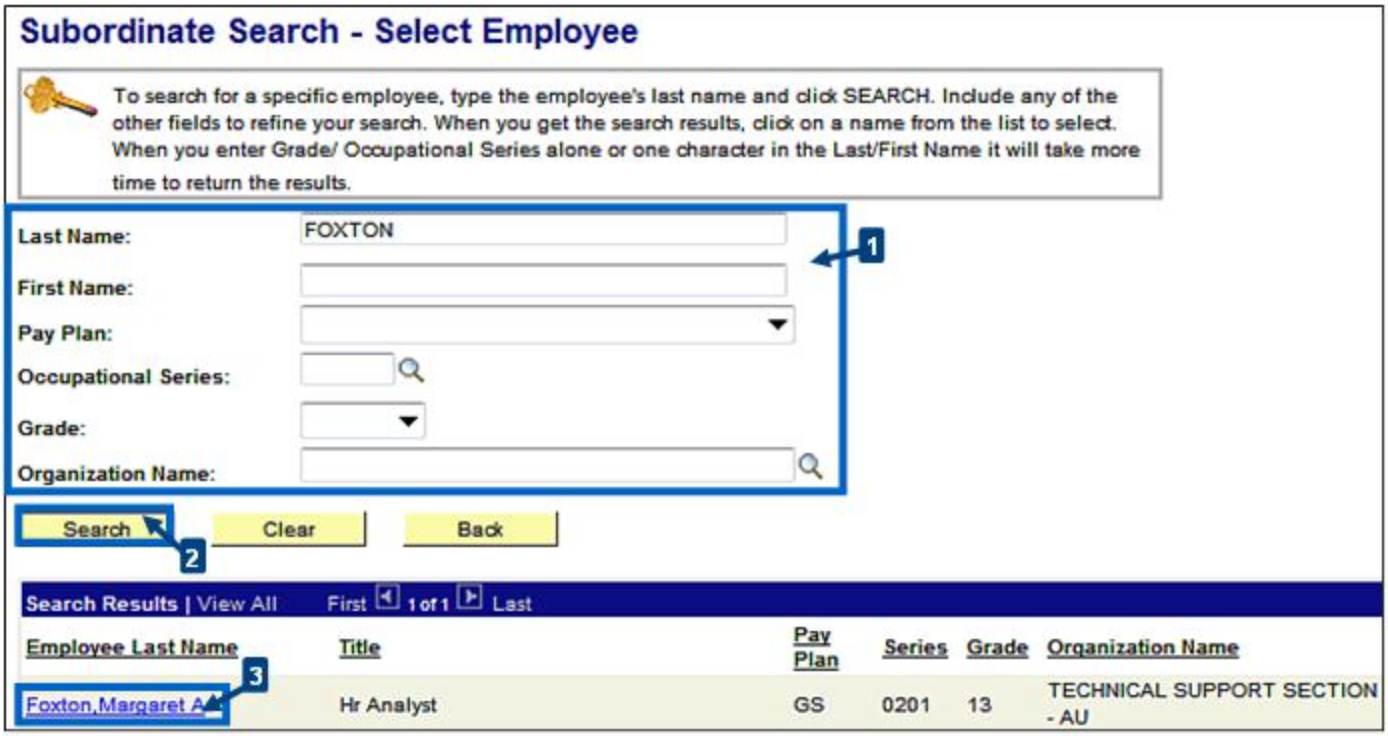
Manager tab>People and Positions pagelet

1. Select the desired **Employee Name** from the list.
2. View the desired information from the **Employee Data/Personnel Actions** page.

VIEW A SUBORDINATE EMPOYEE'S INFORMATION

Manager tab>People and Positions pagelet >Subordinate Employees link>Subordinate Search – Select Employee page

1. Enter or select the desired information.
2. Select the **Search** button.
3. In the search results, select the **Employee Last Name** from the list. (This will take you to the **Employee Data/Personnel Actions** page.)



Chapter 6 Figure 110: Subordinate Search- Select Employee Page

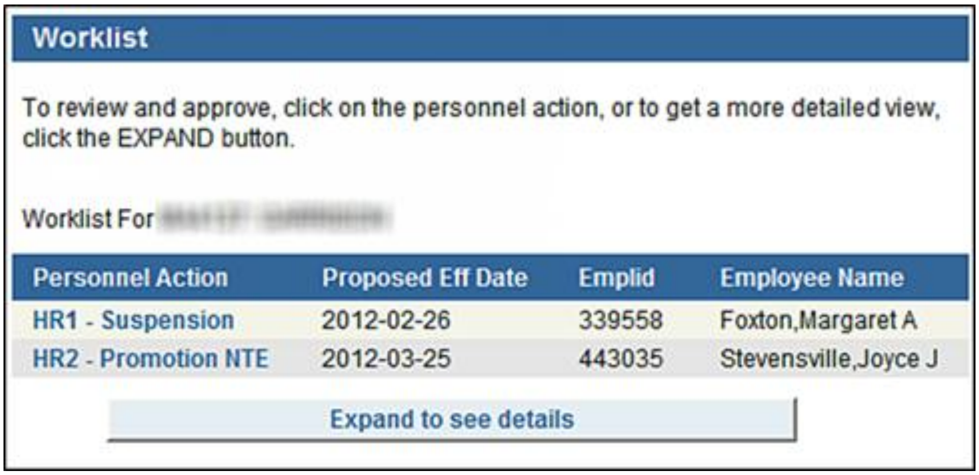
CHAPTER 7: HUMAN RESOURCES SELF SERVICE (HRSS)

While MSS actions may be initiated through the Manager tab (the front-end of HR Connect), HRSS actions must by processed by HRSS users via the **HR tab** and **Back-End Menu.** The following are the primary functions of HRSS:

- Reviewing your Individual Worklist.
- Viewing the status of worked items that no longer appear in your Individual or Group Worklists.
- Viewing an Employee's Personal Information.
- Reviewing and printing an SF-50 Notification of Personnel Actions.
- Viewing and printing a Position Description.

7.1 REVIEWING YOUR INDIVIDUAL WORKLIST

Similar to the Manager's Worklist, any PARs requiring processing or authorization assigned to your account will appear in your **Individual Worklist**.

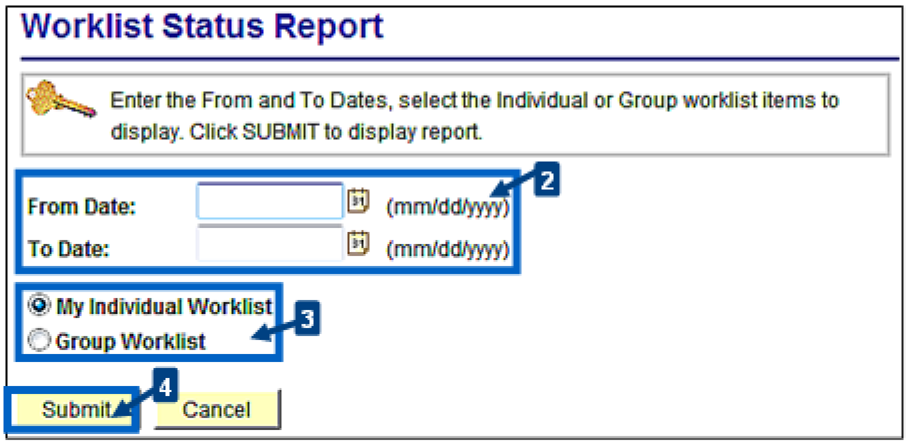


Chapter 7 Figure 111: Individual Worklist

7.2 VIEW WORKLIST STATUS

HR Tab>HR Processing pagelet>Worklist link

1. Select **Worklist Status**.
2. Enter/Select the desired **From Date** & **To Date**.
3. Select your **Individual** or **Group** worklist.
4. Select the **Submit** button. (This will take you to the **Worklist Status Report** for the worklist you selected.)

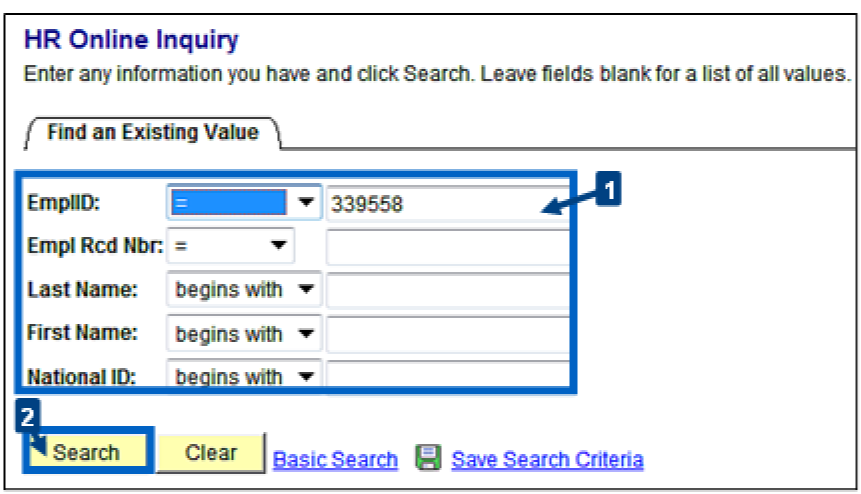


Chapter 7 Figure 112: Worklist Status Report

7.3 VIEW AN EMPLOYEE'S PERSONAL INFORMATION

HR Tab>HR Processing pagelet

1. In the **HR Processing** pagelet, select the **HR Online Inquiry** link.
2. On the **HR Online Inquiry** page, enter the desired **search criteria** in the fields provided.
3. Select the **Search** button. The **HR Online Inquiry Screen** (with the employee's personal information),will then display.



Chapter 7 Figure 113: HR Online Inquiry Search Screen

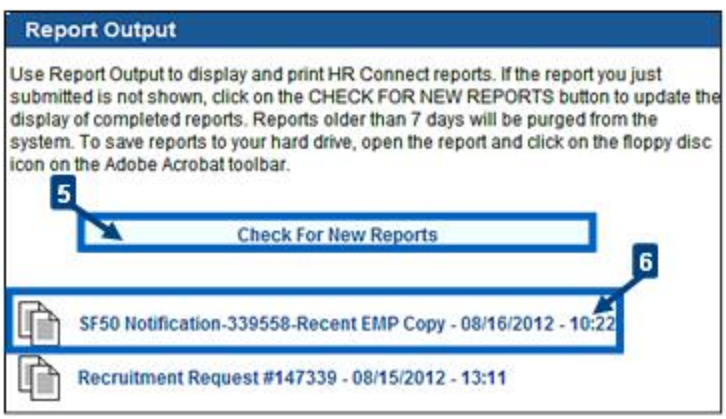
7.4 View or Print an Employee's SF-50

HR Tab>HR Processing pagelet>SF-50 Notification of Personnel Action link

1. Enter the desired **Employee ID** in the **EmplID** field.
2. Select the **Search** button.
3. Select the **View or Print the Most Recent SF-50 Personnel Action** checkbox.
4. Select the **Submit** button.

Chapter 7 Figure 114: HR Processing- SF-50 Notification Of Personnel Actions

5. From the Report Output page, select **Check for New Reports**.
6. Select the desired report. (The employee's SF-50 form will then display.)

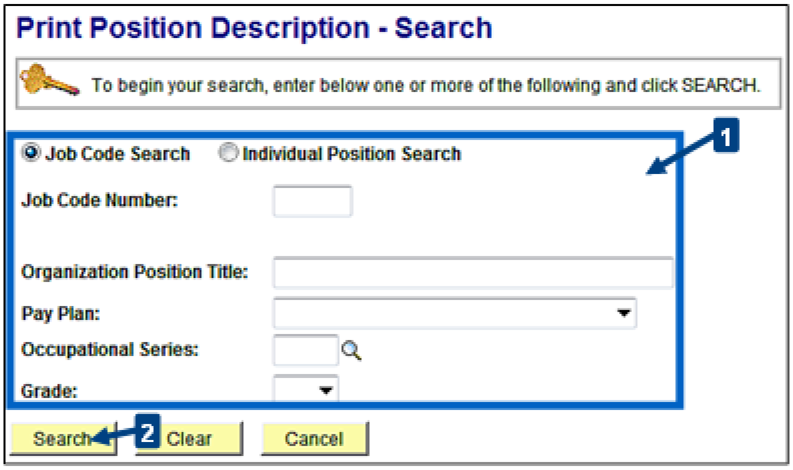


Chapter 7 Figure 115: Report Output (SF-50 Form)

7.5 PRINT A POSITION DESCRIPTION

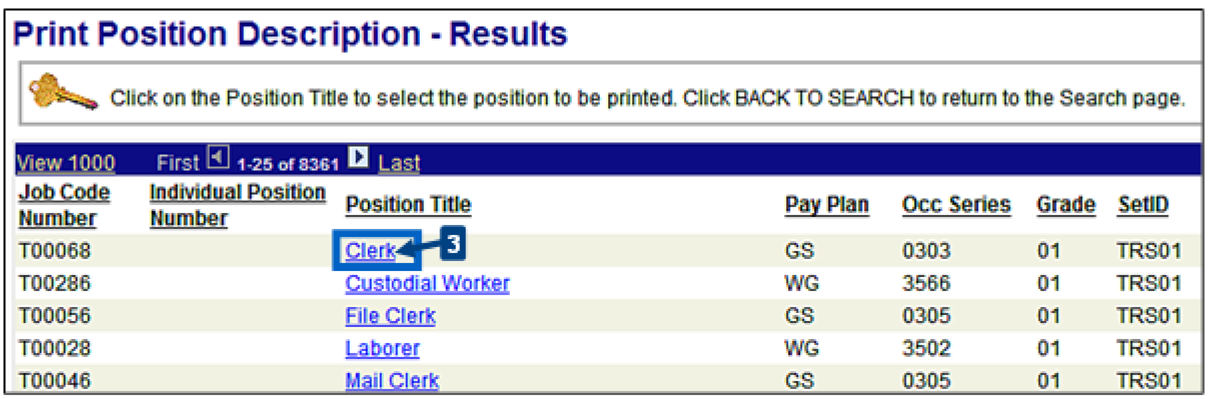
HR Tab>HR Documents pagelet>Print Position Description link

1. Enter/Select the Job Code search criteria.
2. Select the **Search** button.



Chapter 7 Figure 116: Print Position Description- Search

3. In the **Search Results**, select the desired **Position Title**.



Job Code Number	Individual Position Number	Position Title	Pay Plan	Occ Series	Grade	SetID
T00068		Clerk	GS	0303	01	TRS01
T00286		Custodial Worker	WG	3566	01	TRS01
T00056		File Clerk	GS	0305	01	TRS01
T00028		Laborer	WG	3502	01	TRS01
T00046		Mail Clerk	GS	0305	01	TRS01

Chapter 7 Figure 117: Print Position Description- Results

4. On the Report Output page, select **Check for New Reports**.

Note: If no reports are visible, select the Check for New Reports button to refresh the list.

5. Select the desired report. The **Position Description** will then display.

CHAPTER 8: POSITION MANAGEMENT

8.1 OVERVIEW

HR Connect is a position-driven system; it requires that a position exist in the system before hiring or promotion actions can be performed. The defining characteristics of any position (e.g., General Schedule, Title, Manager Level, etc.) are referred to as its Position Description (PD), referred to in HR Connect as a Job Code (JC). While each position is assigned a unique eight-digit Position Number, many positions may share the same job code.

This section provides walkthroughs for the creation and management of Job Codes, Positions, and Requisition Requests from the perspective of both MSS and HRSS users.

8.2 POSITION DESCRIPTION/JOB CODE MANAGEMENT

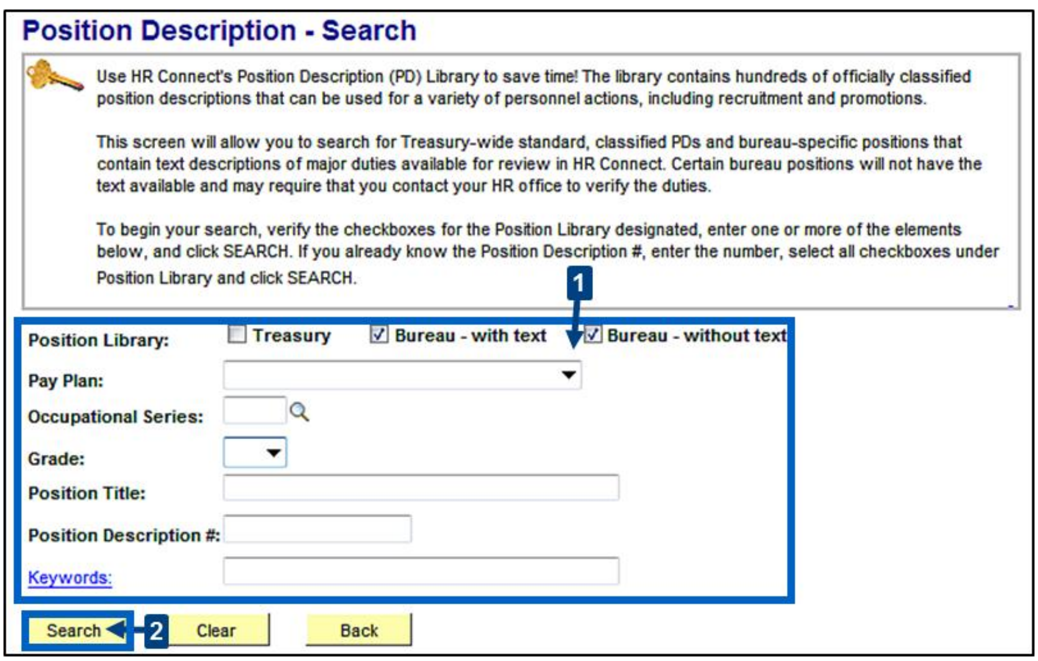
While Job Codes may be requested by Managers, MSS roles do not include functionality to process such requests. HRSS provides the functionality necessary to create Job Codes by either approving Job Code requests or, if no request was submitted, initiating the creation of new Job Codes.

To initiate and process a Job Code request:

INITIATING A JOB CODE REQUEST IN MSS

Manager tab>Positions pagelet>Establish New Position link>Position Description – Search page

1. Enter the **search criteria** associated with the desired job code.
2. Select the **Search** button.

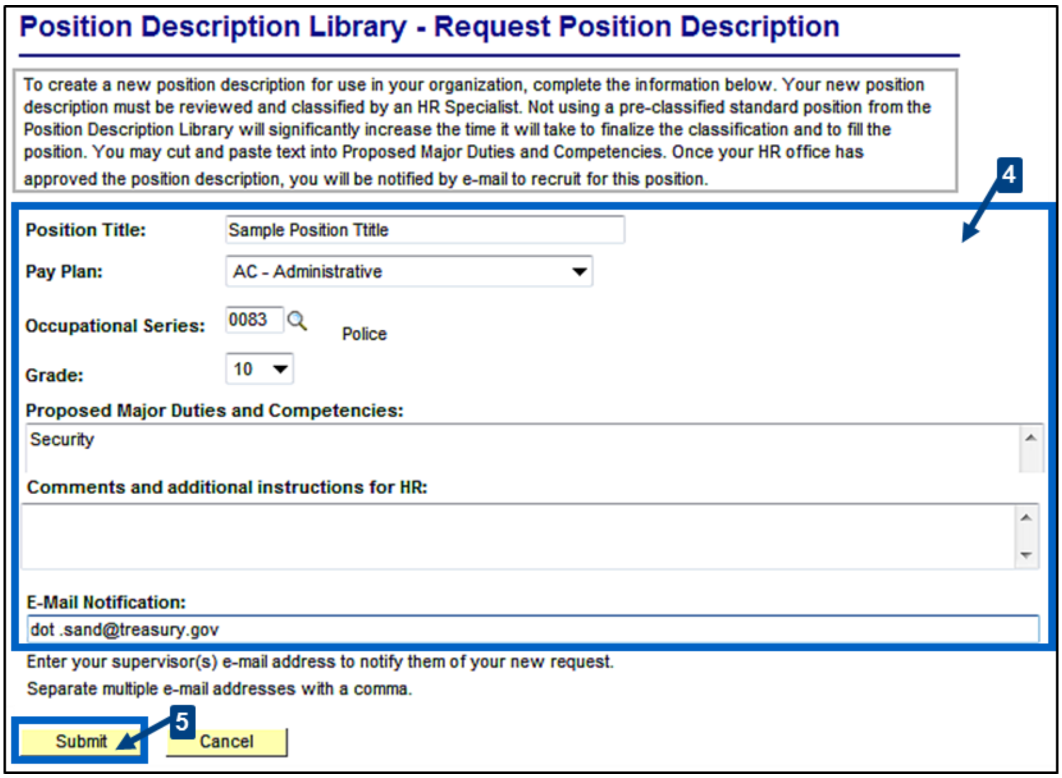


Chapter 8 Figure 118: Position Description Search For Job Code Creation Request

3. In the **Search Results**, select the **Click Here** link.

Figure 119: Create New Job Code Click Here Link

4. On the **Position Description Library** page, enter or select the appropriate **Job Code/Position Description** information.
5. Select the **Submit** button.



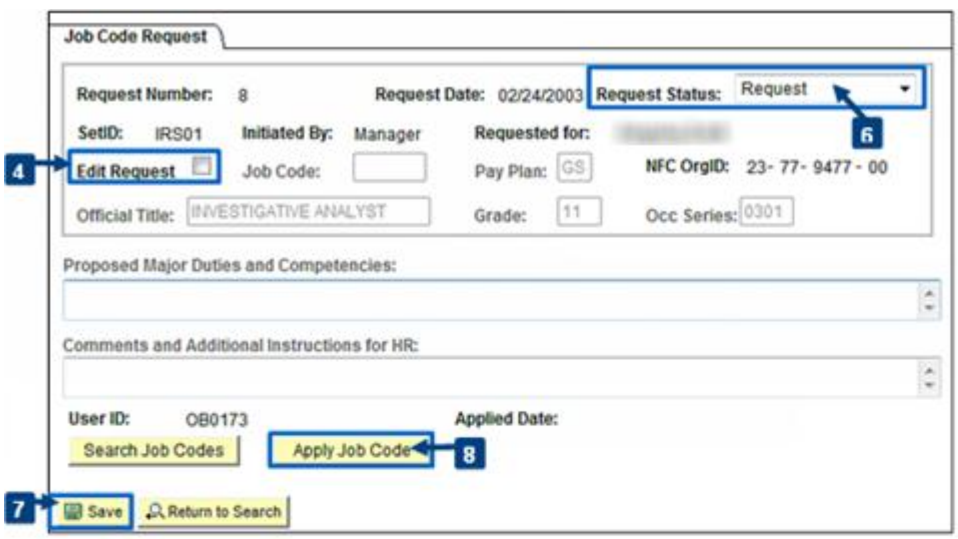
Chapter 8 Figure 120: Position Description Library- Request Position Description

6. In the **Confirmation** message, select the **OK** button. (This will take you back to your Home Page.)

Processing a Job Code Request in HRSS

Menu tab>Organizational Development menu>Position Management link>Define Position Data USF link>Job Code Request link>Job Code Request page

1. On the **Job Code Request** page, enter search criteria (e.g., **Request Number**).
2. Select the **Search** button.
3. In the **Search Results**, select the desired **Req#** (Request Number) link.
4. If changes are necessary, select the **Edit Request** checkbox. (If not, skip to step 6).
5. Make any necessary changes.
6. Select the **Request Status** from the dropdown menu.
7. Select the **Save** button.
8. To create the requested job code, select the **Apply Job Code** button. (This will take you to the **Add a New Value** tab on the **Job Code USF** page. To complete this process, follow the steps provided in the **Creating/Modifying a Job Code in HRSS** section.)

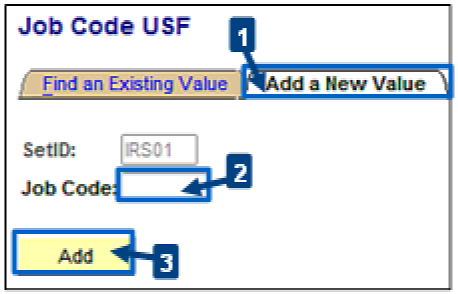


Chapter 8 Figure 121: Reviewing a Job Code Request

CREATING/MODIFYING A JOB CODE IN HRSS

Menu tab>Organizational Development menu>Position Management link>Define Position Data USF link>Job Codes link>Job Code USF page

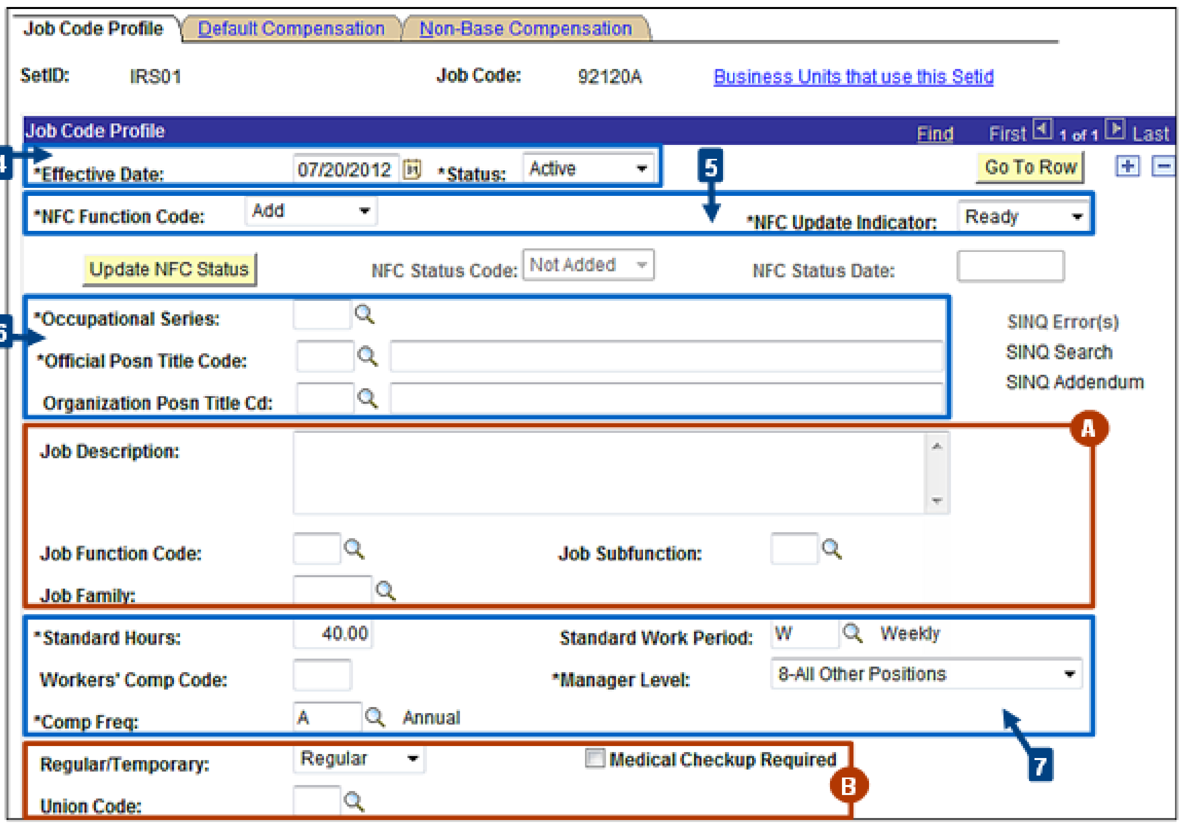
1. Select the **Add a New Value** tab.
2. Enter the **Job Code** you would like to create.
3. Select the **Add** button.



Chapter 8 Figure 122: Job Code USF Page

Note: The steps for creating a new job code are similar to the steps for modifying an existing job code. To modify an existing job code, select the add a new row (**+**) button on the Job Code Profile tab prior to Step 4.

4. Enter the desired **Effective Date** (defaults to current date) and select the appropriate **Status** (defaults to active) in the date field and dropdown menu provided.
5. Ensure that the **NFC Function Code** and **Update Indicator** in the dropdown menus are set to **Add** and **Ready** respectively.
6. Enter the **Occupational Series** and **Official Posn** (Position) **Title Code** (Optional: as well as the **Organization Posn** [Position] **Title Code**) in the fields provided.
7. Enter the **Standard Hours**, **Standard Work Period**, **Comp Freq** (Compensation Frequency), and select the **Manager Level** associated with the job code in the fields and dropdown menu provided. If necessary you may also enter the **Workers' Comp** (Compensation) **Code** in the field provided.

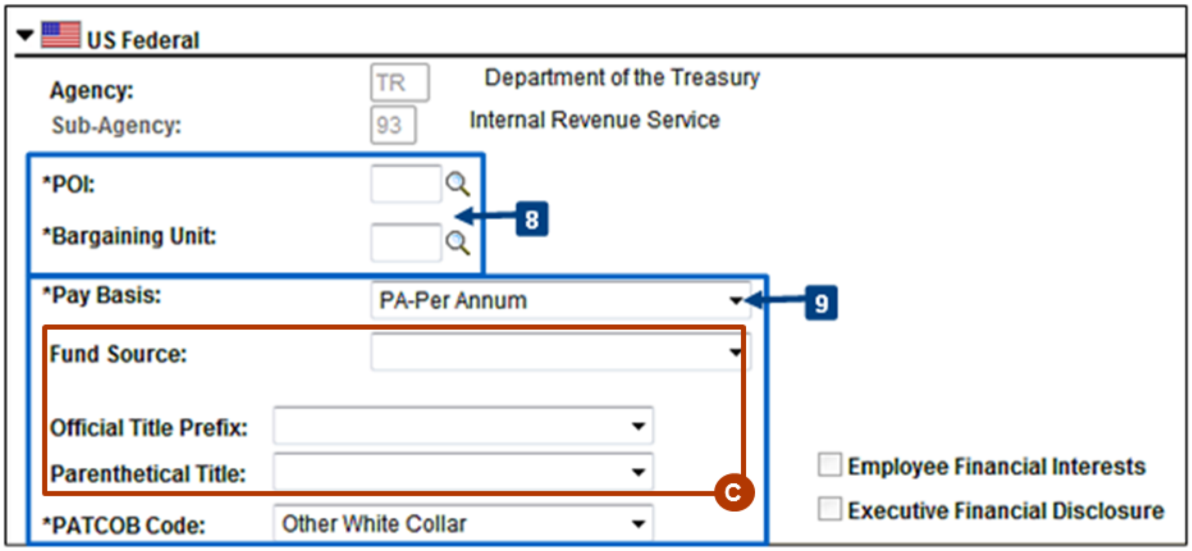


Chapter 8 Figure 123: Job Code Profile Tab – Job Code Profile Pagelet

You may also enter:

A. The **Job Description**, **Function** and **Subfunction Codes**, and **Job Family** associated with the Job Code.
B. The **Union Code** associated with the Job Code. You may also specify whether or not the Job Code is **Regular/Temporary** and if a **Medical Checkup is Required** for positions assigned this job code.

8. Enter the appropriate **POI** (Personnel Office ID) and **Bargaining Unit** in the fields provided.
9. Select the **Pay Basis** and **PATCOB Code**, corresponding to the occupational category associated with the job code, in the dropdown menus provided.

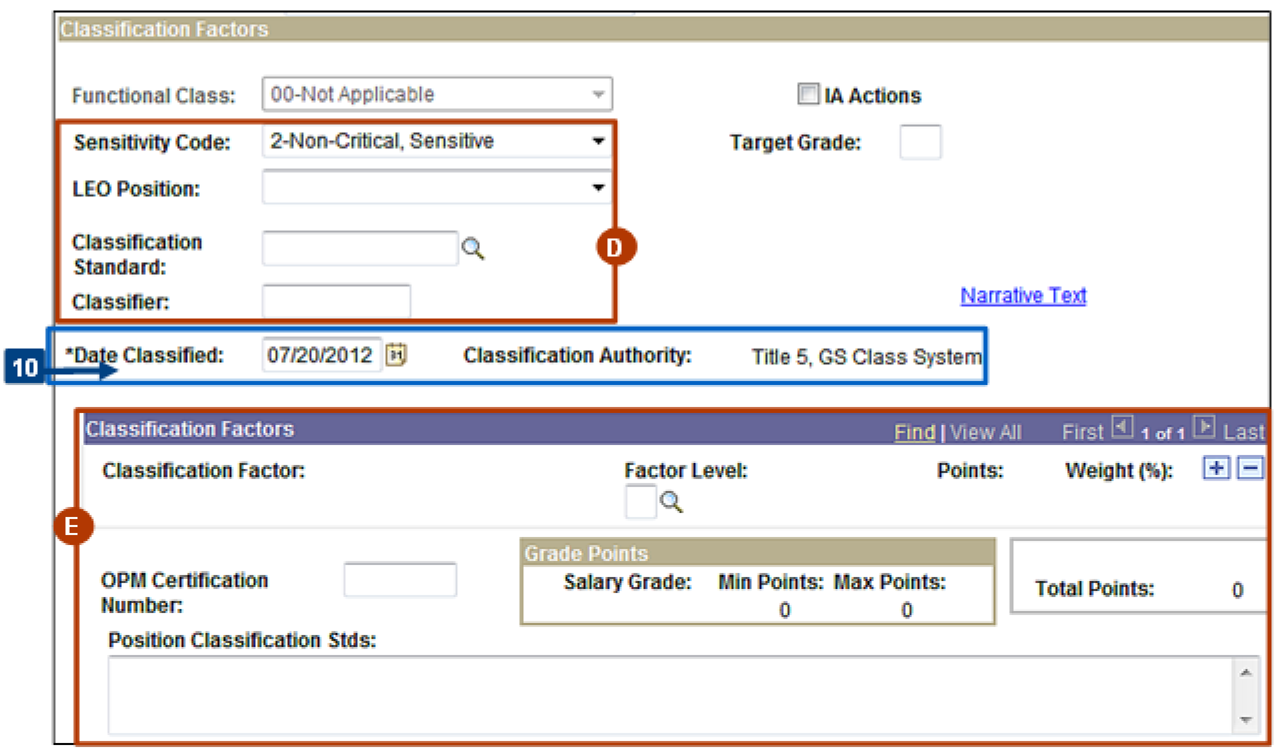


Chapter 8 Figure 124: Job Code Profile Tab – US Federal Pagelet

You may also enter:

C. The **Fund Source**, **Official Title Prefix**, and **Parenthetical Title** associated with the Job Code.

10. Enter the classification date in the **Date Classified** field.

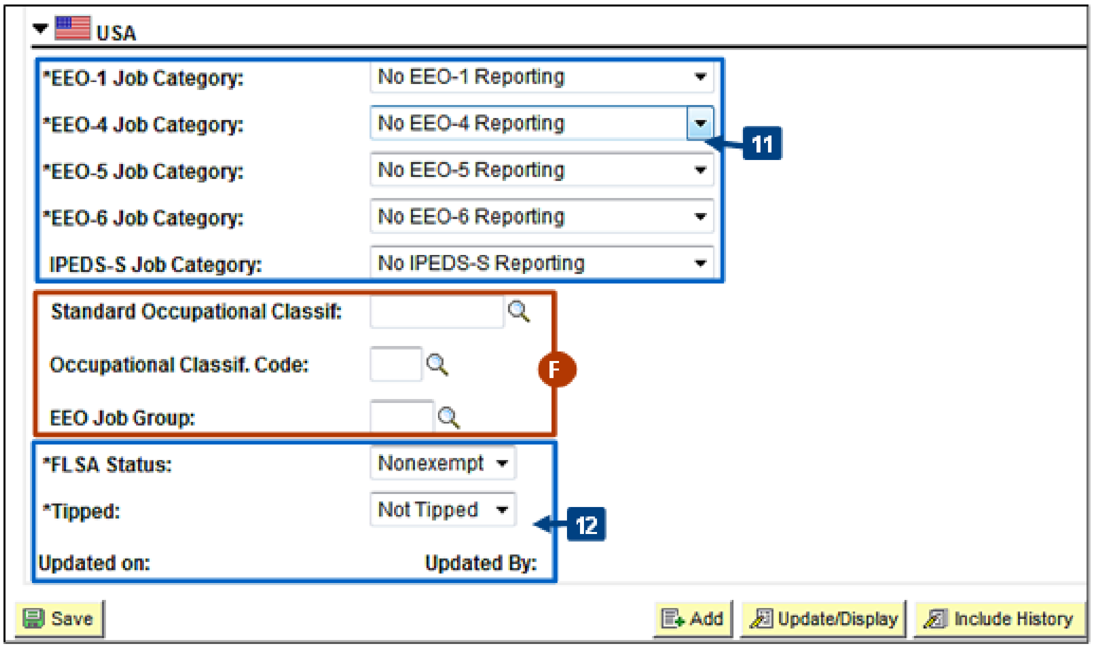


Chapter 8 Figure 125: Job Code Profile Tab – Classification Factors Pagelet

Here you may also enter:

D. The **Sensitivity Code**, **LEO Position**, **Classification Standard, and Classifier** associated with the Job Code.
E. The **Factor Level**, **OPM Certification Number**, and **Position Classification Stds** associated with the **Classification Factor**.

11. Select the appropriate **EEO/IPEDS Job Categories** in the dropdown menus provided.
12. Ensure the information in the **FLSA Status** (Fair Labor Standards Act Status) and **Tipped** dropdown menus provided are correct.

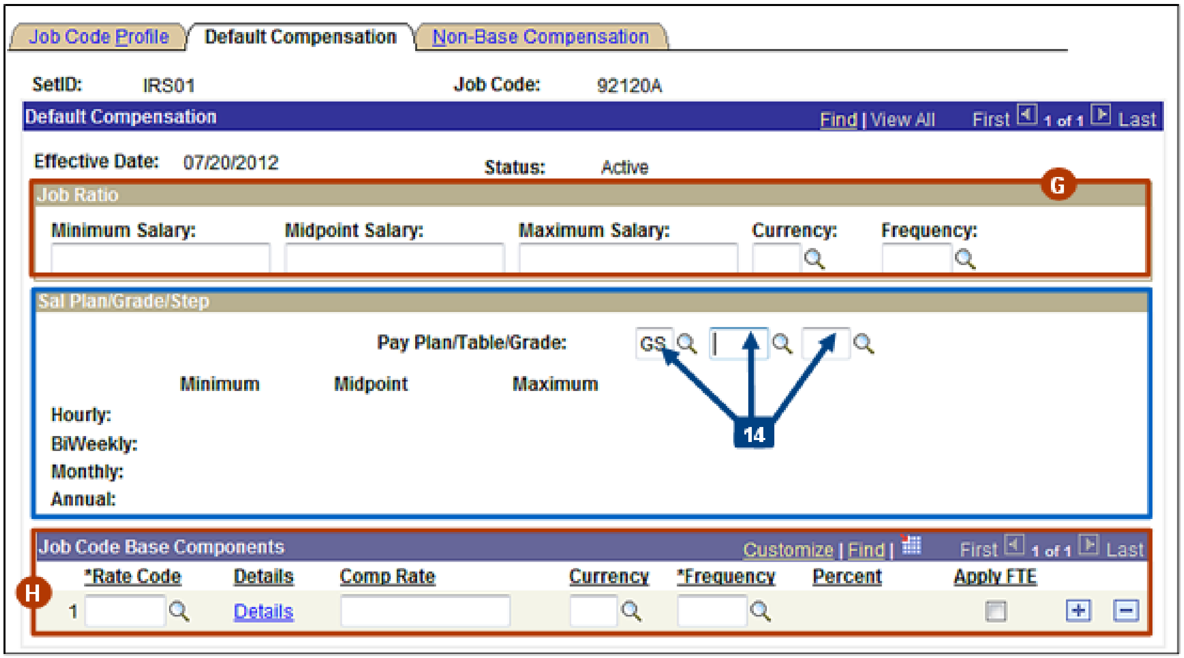


Chapter 8 Figure 126: Job Code Profile Tab – USA Pagelet

You may also enter:

F. The **Standard Occupational Classif** (Classification), **Occupational Classif** (Classification) **Code**, and **EEO Job Group** in the fields provided.

13. Select the **Default Compensation** tab.
14. Enter the **Pay Plan/Table/Grade** in the fields provided.



Chapter 8 Figure 127: Default Compensation Tab

Here you may also enter:

- **G. Minimum**, **Midpoint**, **Maximum Salary** information in addition to **Currency** and **Frequency** of payment.
- **H. Rate Code**, **Comp** (Compensation) **Rate**, **Currency**, and **Frequency**

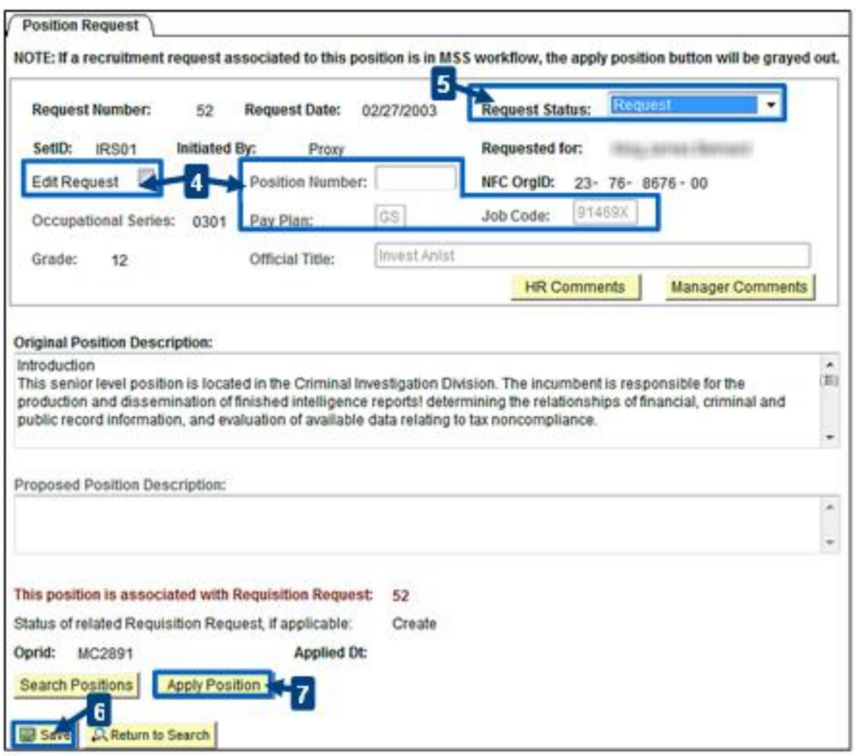
15. Select the **Non-Base Compensation** tab.
16. (Optional): Review the **Rate Code**, **Comp Rate**, **Currency** and **Frequency** of Non-Base Compensation.
17. Select the **Save Button** to create the Job Code. (This will refresh the tab and create the job code.)

8.3 Position Management

Processing a Position Request in HRSS

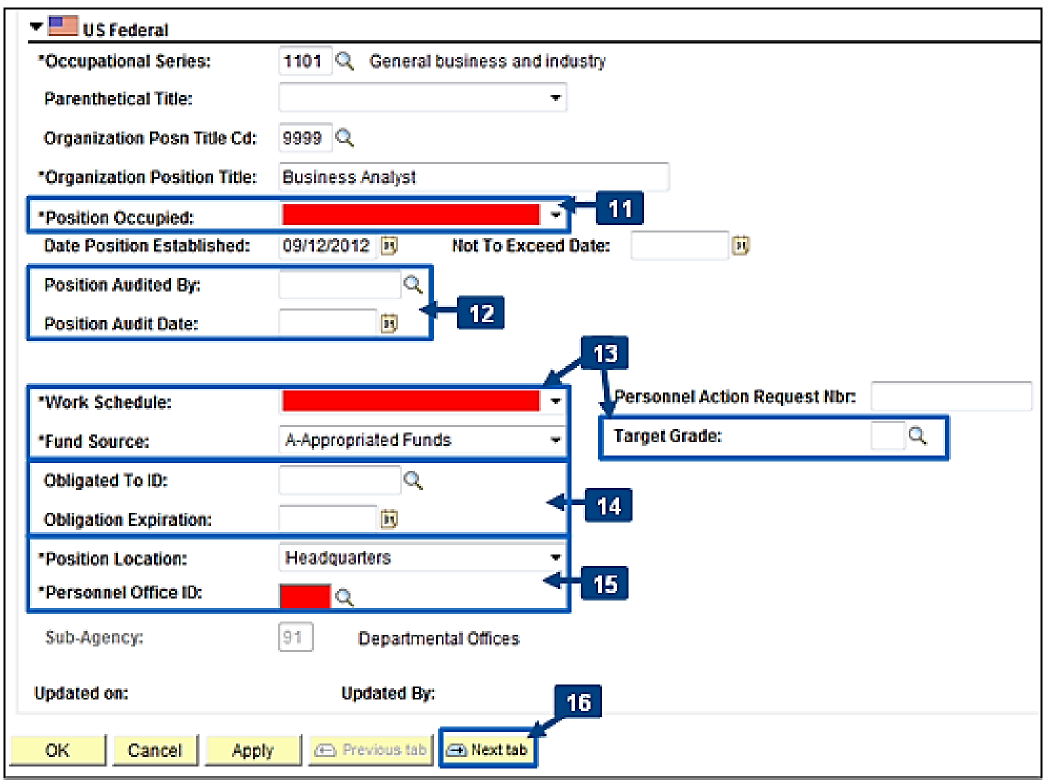
Menu tab>Organizational Development link>Position Management link>Maintain Positions/Budgets link>Position Request link>Position Request page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. In the **Search Results**, select the desired **Req#** (Request Number) link.
4. (To make changes): In the **Position Request** tab, select the **Edit Request** checkbox and make changes to the **Position Number**, **Pay Plan**, or **Job Code**.
5. Select the **Request Status** from the dropdown menu.
6. Select the **Save** button.
7. To create the requested job code, select the **Apply Position** button.



Chapter 8 Figure 128: Position Request Form

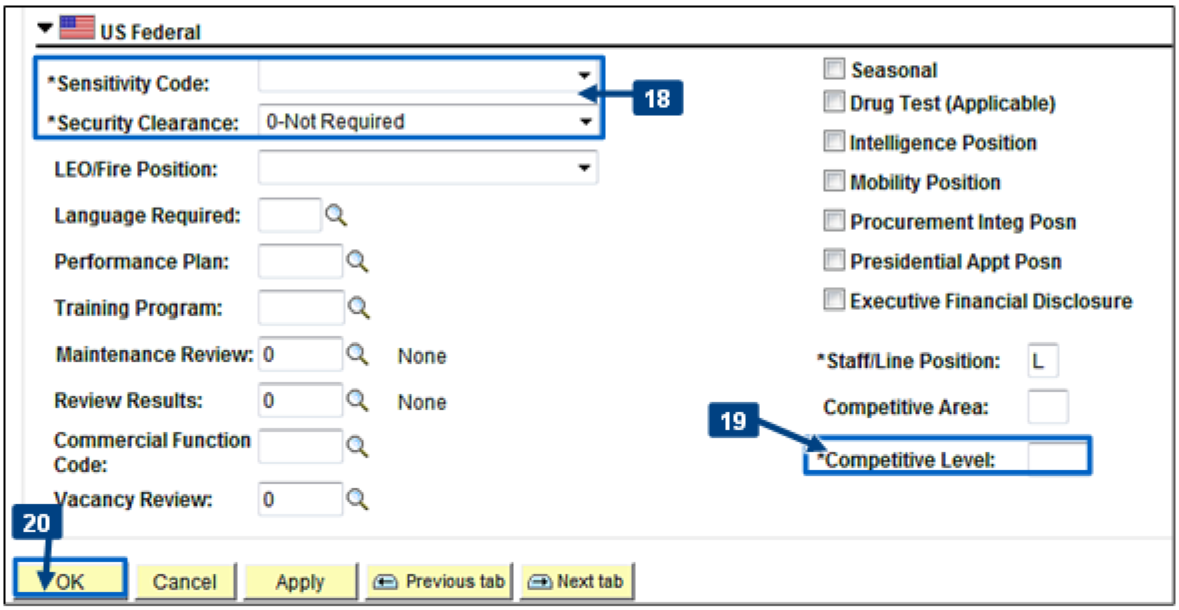
8. On the **Description** tab, review the **Position Information** pagelet for accuracy.
9. In the **Job Information** pagelet, select **Full/Part Time** status from the dropdown menu.
10. In the **Work Location** pagelet, enter or lookup the appropriate **Department** and **Location**. (Location may automatically populate, depending on the Department chosen.)
11. In the **US Federal** pagelet, select the **Position Occupied**.
12. (Optional): Enter or lookup the position auditor and audit date in the **Position Audited By** and **Position Audit Date** fields.
13. Select the appropriate **Work Schedule**, **Fund Source**, and **Target Grade**.
14. Enter or lookup obligation information in the **Obligated To ID** and **Obligation Expiration** fields.
15. Select the appropriate **Position Location** and **Personnel Office ID**.
16. Select the **Next Tab** button.



Chapter 8 Figure 129: Position Request Tab - US Federal Pagelet

17. On the **Specific Information** tab, review information for accuracy.
18. In the **US Federal** pagelet, select the appropriate **Sensitivity Code** and **Security Clearance**.
19. Enter the appropriate **Competitive Level**.
20. Select the **Apply** button.

Caution! A confirmation message displays: "Please ensure that you press the **OK** button to complete this position request." This message refers to the **OK** button on the **Description** tab.



Chapter 8 Figure 130: Specific Information Tab - US Federal Pagelet

21. In the confirmation message, select the **OK** button.
22. In the **Description** tab, select the **OK** button. (This takes you to the Position Request page.)

CREATING A POSITION IN HRSS

HRSS (Front End): *HR tab>HR Processing pagelet>Position Wizard link>HR Position Wizard – Entry page*

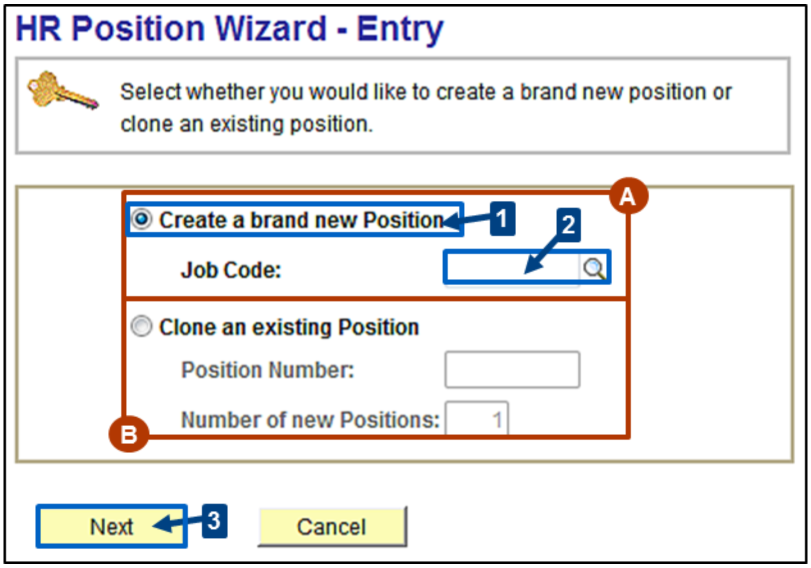
HRSS (Back End): *Menu tab>Organizational Development menu>Position Management link>Maintain Position Budgets link>HR Position Wizard link>HR Position Wizard – Entry page*

The HR Position Wizard provides two methods for creating a position:

- **Create a brand new Position**- This option generates a blank position.
- **Clone an Existing Position**- This option copies data from an existing position and enters it into the new position. The cloning option also allows for the generation of multiple new positions.

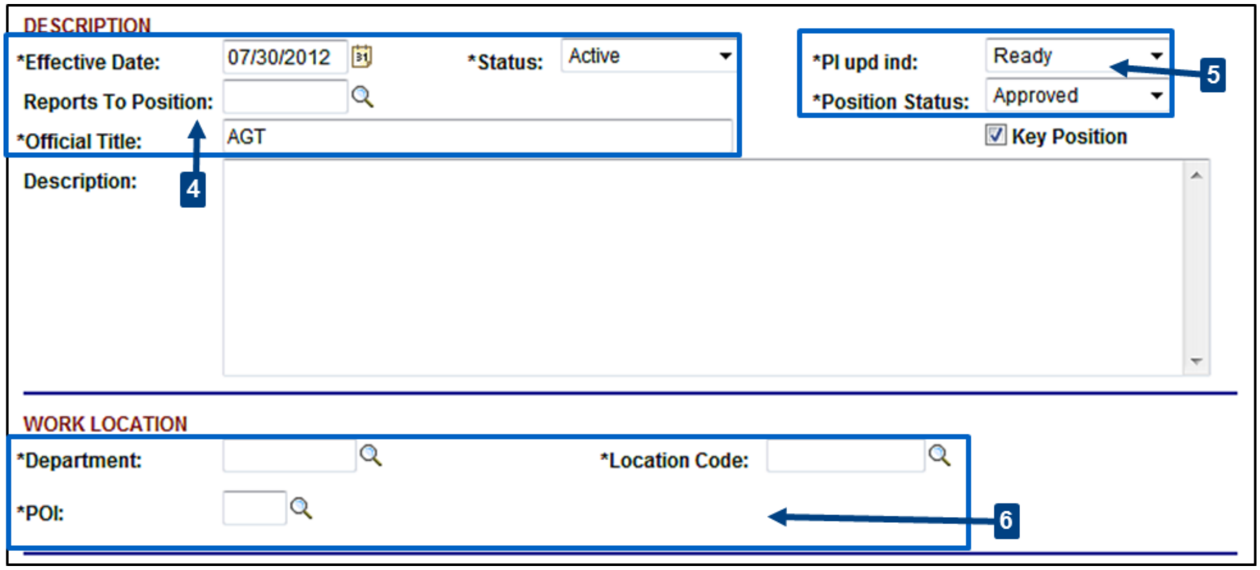
The process for creating a brand new position and cloning an existing position involve the same steps, with the only difference being that cloning a position will reduce the amount of information to be entered. The following walkthrough demonstrates the creation of a brand new position.

1. On the **HR Position Wizard – Entry** page, select the **Create a brand new Position** radio button.
2. Enter a **Job Code** in the field provided.
3. Select the **Next** button.



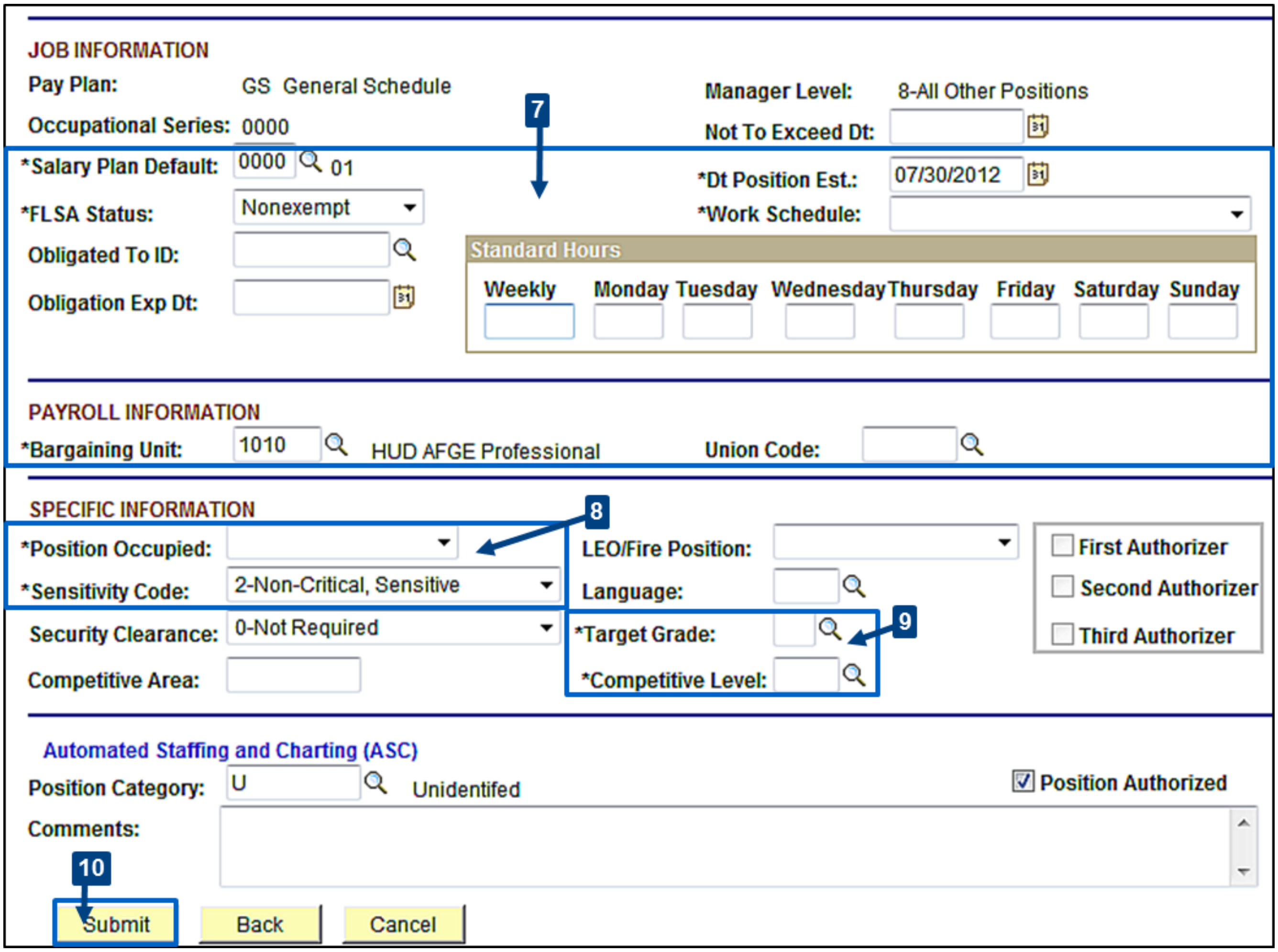
Chapter 8 Figure 131: HR Position Wizard

4. On the **Create a New Position** page, enter the **Effective Date**, **Official Title**, and, if necessary, **Reports to Position** in the fields provided.
5. Ensure that the **Status**, **PI upd ind** (Payroll Interface Update Indicator), and **Position Status** are correct.
6. Enter the **Department**, **Location Code**, and **POI** (Personnel Office Identifier) in the fields provided.



Chapter 8 Figure 132: Create A Position Form – Description And Work Location Pagelets

7. Ensure that the **Salary Plan Default**, **Dt Position Est.** (Date Position Established), **FLSA Status** (Fair Labor Standards Act Status), and **Bargaining Unit** are correct.
8. Select the **Position Occupied** and **Sensitivity Code** from the dropdown menu's provided.
9. Enter the **Target Grade** and **Competitive Level** in the fields provided.
10. Select the **Submit** button. (This will bring you to a confirmation screen where you will be presented with the Position Number and the choice to create another position.)



Chapter 8 Figure 133: Create a Position Form – Job, Payroll, and Specific Information Pagelets

11. (To create another position): On the confirmation page, select the **Yes** button. (This will take you back to the **HR Position Wizard**. Repeat **Steps 1-10**.)
12. (To exit the **HR Position Wizard**): Select the **No** button. (This will take you back to your Home Page.)

Modifying an Existing Position in HRSS

Menu tab>Organization Development link>Maintain Positions/Budgets>Add/Update Position Info link>Add/Update Position Information page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. On the **Position Description Library- Results** page, select the desired **Official Position Title**.
4. On the **Description** tab, select the add a row (**+**) button.
5. Modify the position information as necessary.
6. Select the **Save** button. (This will save your changes and refresh whichever tab you are currently on.)

8.4 Requisition Request

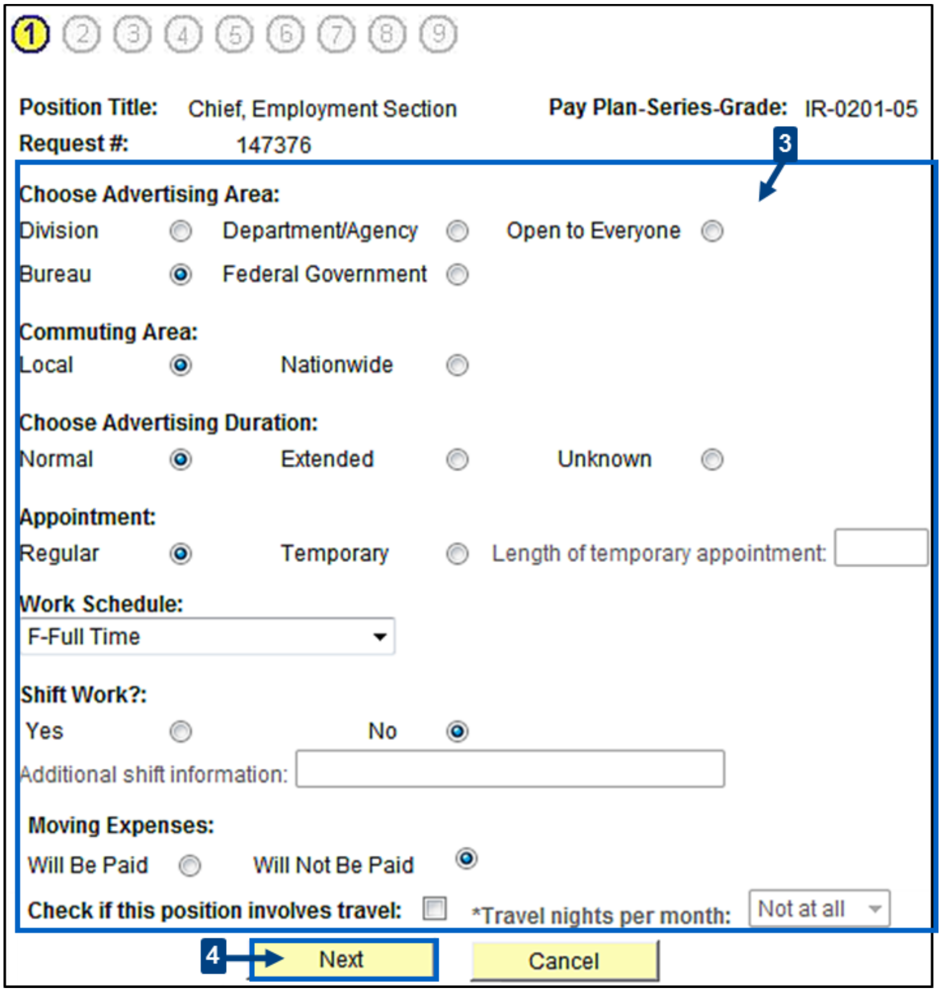
To fill an empty position, whether it was vacated or newly created, a Requisition Request is required to post a vacancy announcement. A Requisition Request may be initiated via MSS or HRSS, but requires processing through HRSS.

To initiate and process a requisition request:

Initiating a Requisition Request in MSS

Manager tab>Positions pagelet>Vacant Positions link>Vacant Positions page

1. On the **Vacant Positions** page, select a **Vacant** position.
2. On the **Recruit – Verify Position** page, select the **To Power Recruiting** button.
3. On the **Power Recruiting (1)** page, verify the position information to be **Advertised**.
4. Select the **Next** button.


1 2 3 4 5 6 7 8 9

Position Title: Chief, Employment Section   Pay Plan-Series-Grade: IR-0201-05
Request #: 147376

3

Choose Advertising Area:
Division   Department/Agency   Open to Everyone
Bureau   Federal Government

Commuting Area:
Local   Nationwide

Choose Advertising Duration:
Normal   Extended   Unknown

Appointment:
Regular   Temporary   Length of temporary appointment:

Work Schedule:
F-Full Time

Shift Work?:
Yes   No
Additional shift information:

Moving Expenses:
Will Be Paid   Will Not Be Paid
Check if this position involves travel: *Travel nights per month: Not at all

4 Next   Cancel

Chapter 8 Figure 134: Power Recruiting Form – Page 1

5. On the **Power Recruiting (2)** page, verify or add **Additional Occupational Series**.
6. Select the **Next** button.
7. On the **Power Recruiting (3)** page, verify **Position Grade Information**.
8. Select the **Next** button.
9. On the **Power Recruiting (4)** page, enter **Advertising Sources** (e.g., Newspaper, Internet, etc.) in the field provided.
10. Select the **Next** button.
11. On the **Power Recruiting (5)** page, enter the **Work Location** in the fields provided.
12. Select the **Next** button.
13. On the **Power Recruiting (6)** page, enter the **Help Wanted Box Text** in the field provided.
14. Select the **Next** button.
15. On the **Power Recruiting (7)** page, verify the listed **Job Criteria**.
16. Select the **Next** button.
17. On the **Power Recruiting (8)** page, enter desired **Job Candidate Qualifications** in the field provided.
18. Select the **Next** button.
19. On the **Power Recruiting (9)** page, select the appropriate **Routing Information**. (If this is a Backfill, in the **Is this a Backfill?** item, select **Yes**.)
20. Select the **Submit** button.
21. On the confirmation page, select the **OK** button.
22. In the pop-up message, select the **OK** button. (This will take you to your Home Page.)

Initiating a Backfill in MSS

Overview

A Backfill action is required to make a vacancy announcement when an existing position is vacated by an employee, before that position can be filled. A Backfill action may be initiated by an MSS user, but requires processing by an HRSS user.

The process for initiating a Backfill is similar to the steps shown above in Initiating a Requisition Request in MSS section.

Initiating a Backfill Action

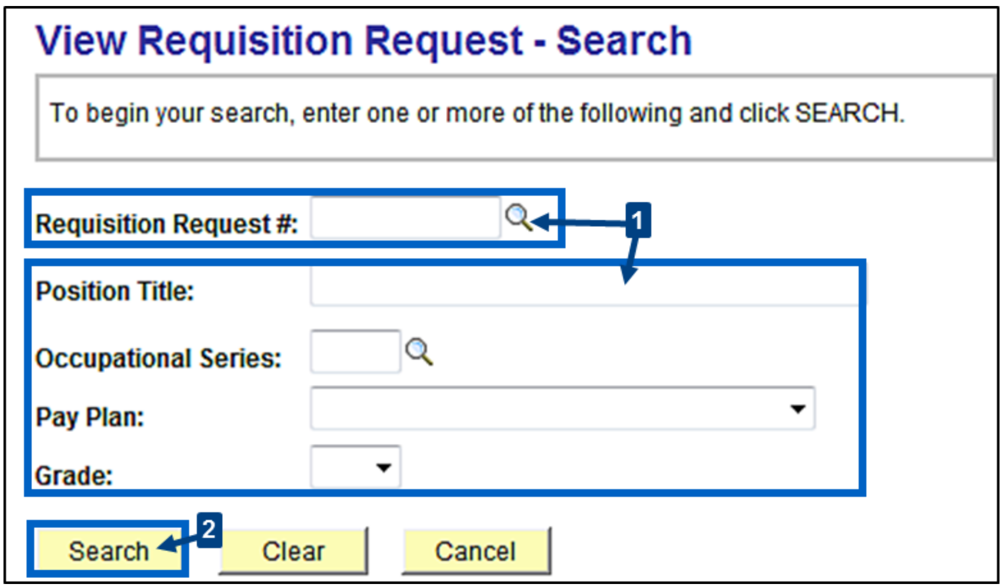
Manager tab>People and Positions pagelet>Employee Name link>Employee Actions Personnel Data page

1. In the **Personnel Actions** pagelet, select the **Backfill link.**
2. Select the **To Power Recruiting** button.
3. Complete **Steps 3-22** in the **Initiating a Requisition Request in MSS** section provided above.

Reviewing a Requisition Request in HRSS

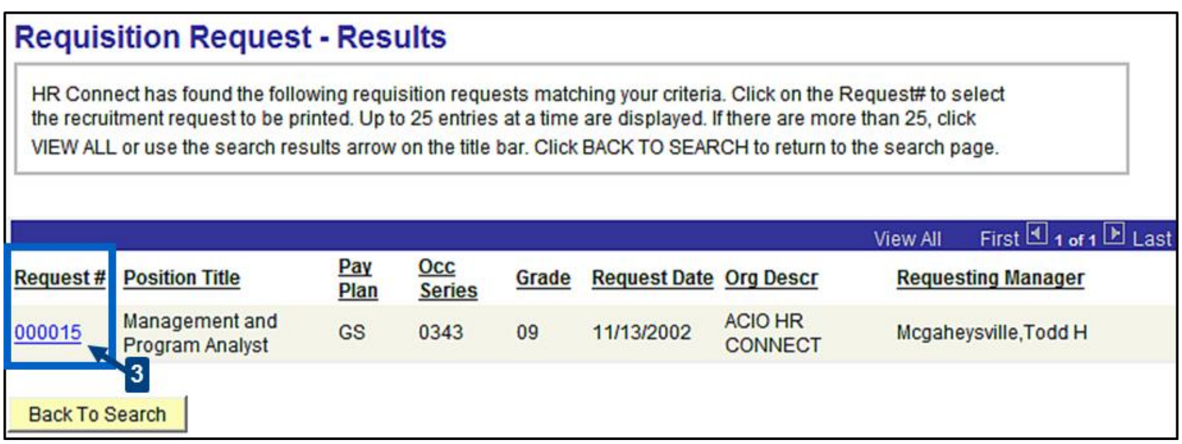
HR tab>Recruitment Tools pagelet>View Requisition Requests link>View Requisition Request Search page

1. Enter or select the **Requisition Request Number** (or search criteria) for the position to be filled in the field(s) provided.
2. Select the **Search** button.



Chapter 8 Figure 135: View Requisition Request – Search Page

3. In the **Search Results**, select the appropriate **Request Number**.



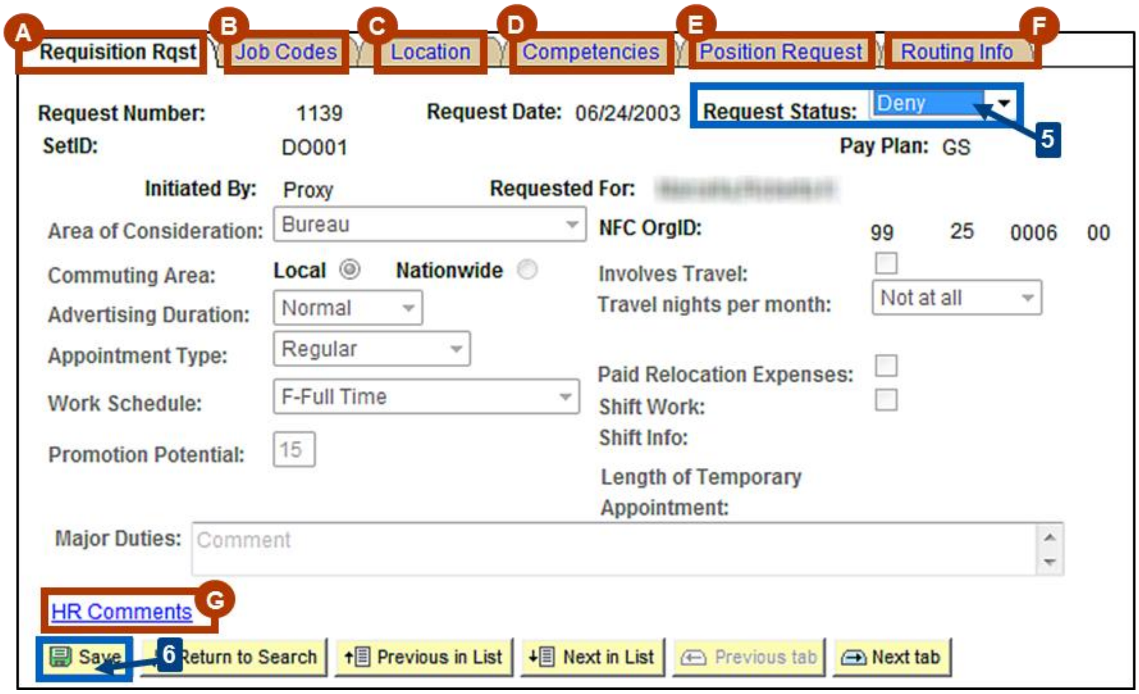
Chapter 8 Figure 136: Requisition Request – Results Page

4. On the **Report Manager** page, select the **OK** button.
5. On the **Report Output** tab, select the **Recruitment Request** report link. (This will open the **Power Recruiting - Summary** in a new window. If no reports are visible, select the **Check for New Reports** button to refresh the list.)

PROCESSING A REQUISITION REQUEST IN HRSS

Menu tab> Recruiting menu> Display Requisition Request link>Display Requisition Request Search page

1. Enter the **Requisition Request Number** (or relevant **search criteria)** for the position to be filled in the field(s) provided.
2. Select the **Search** button.
3. In the **Search Results**, select the appropriate **Requisition Request**.
4. Review the requisition request.
5. In the **Requisition Rqst** tab, select the appropriate **Request Status** from the dropdown menu.
6. Select the **Save** button. (This will save your and refresh the **Requisition Rqst** tab.)



Chapter 8 Figure 137: Requisition Request Tab

A. **Requisition Rqst- The Requisition Request tab displays a summary of the requisition request, including the Request Number and Request Status.**
B. **Job Codes**- This tab displays the Position Description/Job Code data associated with the requisition request.
C. **Location**- This tab displays the advertised job location and **Advertising Sources**.
D. **Competencies**- This tab presents the competencies to be posted in the vacancy announcement.

E. **Position Request**- This tab presents information pertaining to the vacant position to be filled.
F. **Routing Info**-The **Routing Information** tab displays tracking data (i.e., actions taken and relevant comments) associated with the requisition request.
G. **HR Comments**- This link takes you to the **HR Comments** page where you can add comments to the Requisition Request.

Chapter 9: ePerformance

9.1 ePerformance Overview

HR Connect's ePerformance is a performance plan management tool accessible to Employees and Managers. It involves the creation and maintenance of performance documents. These documents outline plans and form the basis for performance ratings for a given assessment period. The ePerformance module is highly customizable and, as a result, procedural details will vary across, and even within, organizations. The following section presents a high-level overview of the ePerformance process.

The assessment process consists of 3 stages:

1. Establishing a Plan
2. Midyear Review
3. Final Review

The ePerformance process commonly involves 3 individuals:

1. Employee
2. Rating Official (Manager)
3. Reviewing Official

The User Guide will be primarily focused on the interaction between Employees and Rating Officials at the Establishing a Plan and Final Review stages.

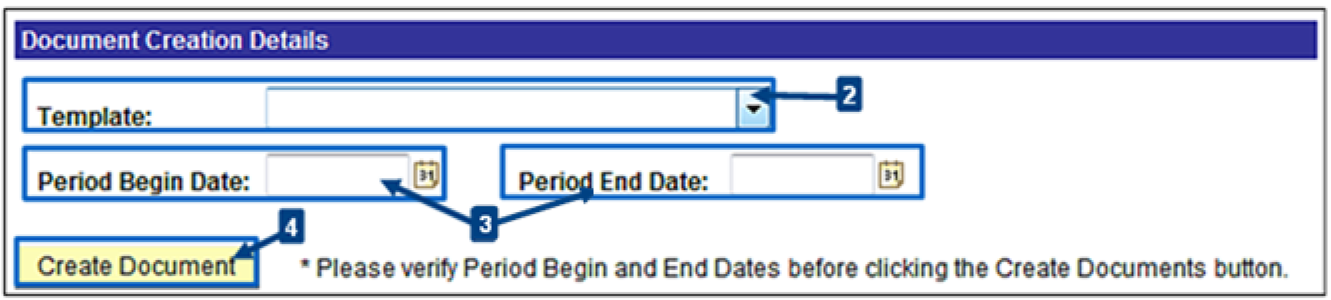
9.2 Establishing a Performance Plan (ESS)

The following subsections will focus on the ESS (Rating Official) role in establishing a performance document. Subsections will be organized by ePerformance stage.

Creating & Maintaining a Performance Plan/Document

Employee tab>ePerformance pagelet>ePerformance link>Performance Management Home page

1. Select the **Create My Performance Document** link.
2. On the **Create Your Performance Document** page, select the desired document **Template**.
3. Ensure the **Period Begin** and **End Dates** are correct.
4. Select the **Create Document** button. (This will create the document and set its status as In Progress. This will take you to the **Maintain Performance Document** page; refer to Step 2 of Maintaining a Performance Plan/Document.)



Chapter 9 Figure 138: Document Creation Details Pagelet

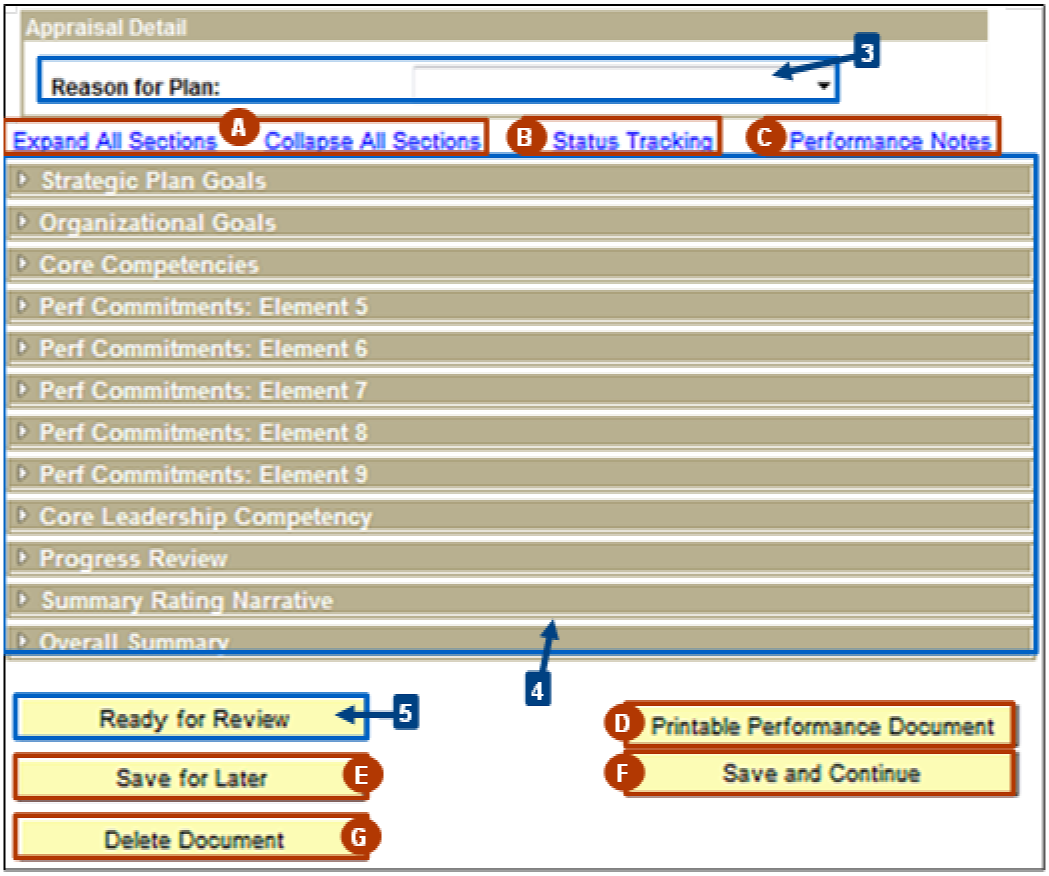
Maintaining a Performance Plan

Employee tab>ePerformance pagelet>ePerformance link>Performance Management Home page

1. On the **Performance Management Home** page, select the **Maintain My Performance Document** link.
2. On the **Maintain Documents** page, select your **Name** inline with the desired document.
3. Select the **Reason for Appraisal** using the dropdown menu.
4. Enter performance plan (e.g., **Goals**, **Competencies**, **Commitments**, etc.).

> **Note:** The information to be entered in this step may vary across organizations and/or performance documents.

5. Select the **Ready for Review** button.



Chapter 9 Figure 139: ESS Maintain Performance Document Page

A. **Expand/Collapse All Sections**– These links allow you to expand or collapse all pagelets at once.
B. **Status Tracking**– This link provides information concerning the documents current status, including information on actions taken and the current document status (e.g., Plan In Progress).
C. **Performance Notes**– This link directs you to a page where you can enter comments concerning the performance document.
D. **Printable Performance Document**– This button generates a printable version of the performance document in the **Report Output** tab.
E. **Save for Later**– This button allows you to save your work and leave the Performance Management section.
F. **Save and Continue**– This button allows you to save your work and continue entering your performance plan.
G. **Delete Document**– Selecting this button will allow you to delete the document.

6. On the **Ready for Review** page, enter or lookup your **Rating Official**.
7. Select the **Ready for Review** button.
8. On the **Ready for Review Confirmation** page, select the **OK** button.

> **Note:** This will transition ownership of the document from you to your manager (or alternative rating official). You will be unable to make changes to the document until the document is returned.

Revising a Performance Plan

Employee tab>ePerformance pagelet>ePerformance link>Performance Management Home page

It is possible that your manager (or alternative rating official) returns your performance document for revisions. Such an action will once again grant you ownership of the document and allow you to make edits.

To revise your performance document:

1. On the **Performance Management Home** page, select the **Maintain My Performance Document** link.
2. On the **Maintain Documents** page, select your **Name** inline with the desired document.
3. On the **Maintain Performance Document** page, make any necessary changes to your plan.
4. Select the **Ready for Review** button.
5. On the **Ready for Review Confirmation** page, select the **OK** button. (This will take you to the **Maintain Documents** page.)

Signing a Performance Plan

Employee tab>ePerformance pagelet>ePerformance link>Performance Management Home page

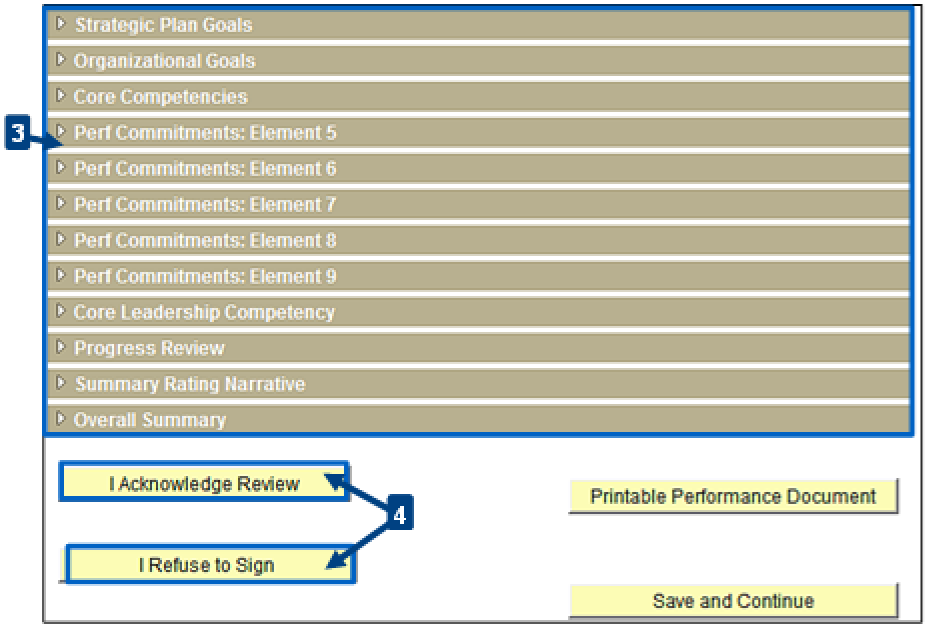
Once the document has been approved by your rating official, it will be returned to you for review. At this point you may choose to either sign or refuse to sign the document. OPM guidelines require that a plan must be reviewed by an employee before it is established, to ensure that employee's understand what their performance review will be based on in the coming year. These guidelines do not require that the employee agree with the plan.

To review and sign your performance plan/document:

1. On the **Performance Management Home** page, select the **Maintain My Performance Document** link.
2. On the **Maintain Documents** page, select your **Name** inline with the desired document.
3. On the **Maintain Performance Document** page, review your performance plan.
4. Select the **I Acknowledge Review** button to indicate approval or the **I Refuse to Sign** button to indicate that you do not approve the plan. (Selecting either button will

indicate that you have reviewed the document and will change the document's status to Plan Established.)

Note: Following Step 5, regardless of your choice, you will need to pass through 2 confirmation screens before you are ultimately returned to the Maintain Documents page.



Chapter 9 Figure 140: ESS Maintain Performance Document – Acknowledge Review

9.3 Establishing a Performance Plan (MSS)

The following subsections will focus on the MSS (Rating Official) role in establishing a performance document. Subsections will be organized by ePerformance stage

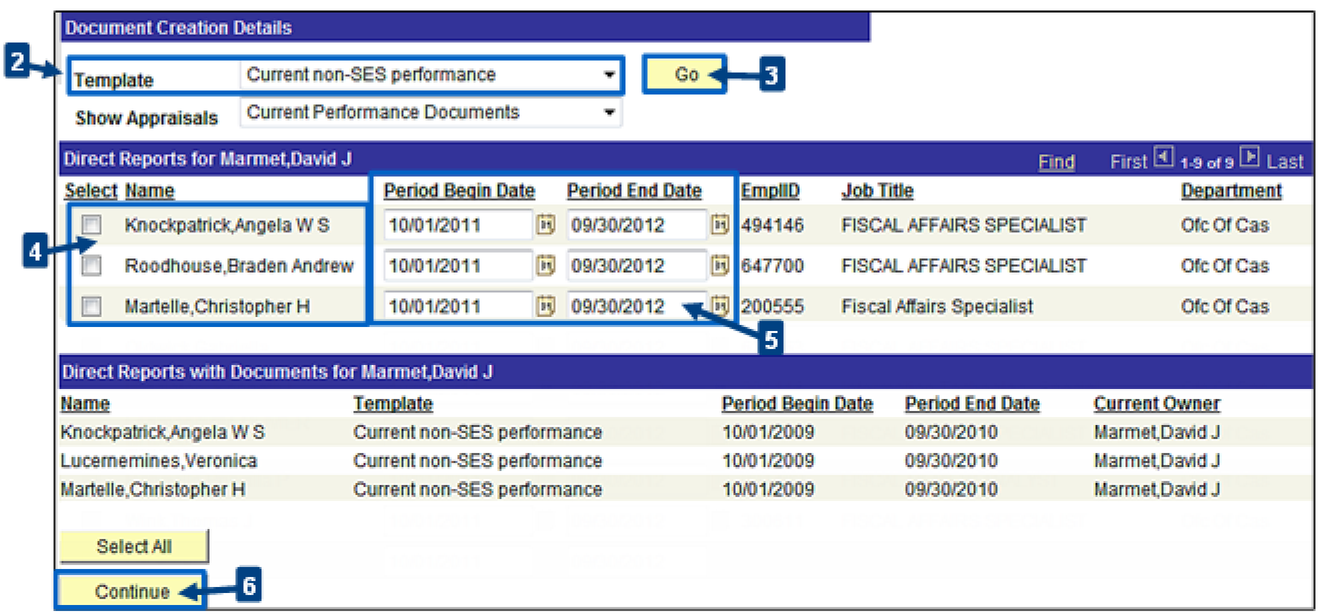
Creating a Performance Document for Direct Reports

Manager tab>ePerformance pagelet>ePerformance link>Performance Management Home page

Although employees may enter their own performance plans through ESS, MSS includes functionality that allows managers to create performance documents for any of their direct reports.

To create a performance document:

1. In the **Performance Documents - Manager** pagelet, select the **Create Performance Documents** link.
2. On the **Select Employees** page, select the desired document **Template**.
3. Select the **Go** button.
4. Select the relevent **Employee(s)**.
5. Verify the **Period Begin** and **End Dates**.
6. Select the **Continue** button.
7. On the **Create Performance Documents** page, select the **Create Documents** button. (This will take you to a confirmation page. The document is accessible through the Maintain Documents page.)



Chapter 9 Figure 141: MSS Create Documents For Direct Reports

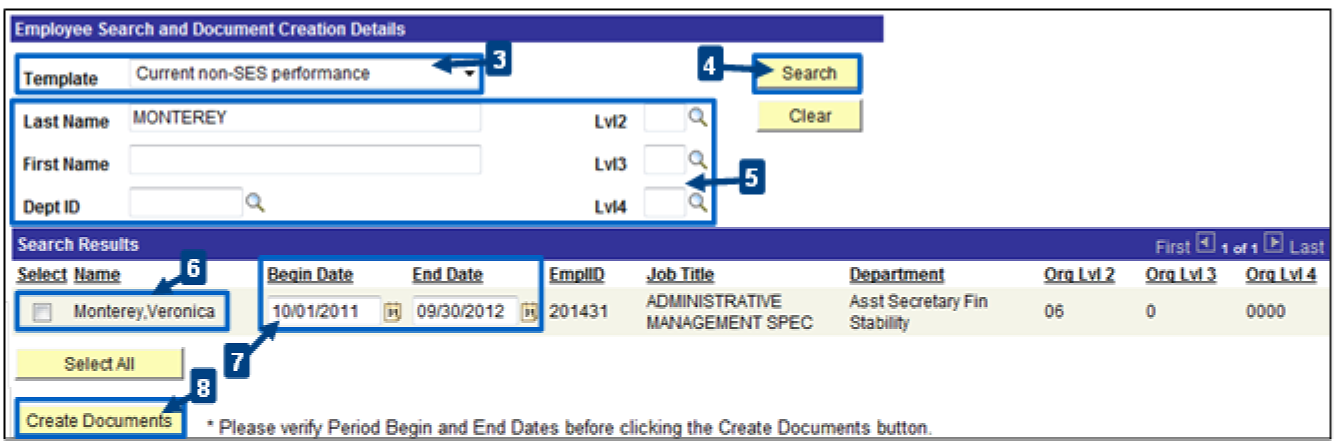
Creating a Performance Document for Other Employees

Manager tab>ePerformance pagelet>ePerformance link>Performance Management Home page

HR Connect includes functionality to create performance documents for employees that are not among your direct reports through MSS.

To create performance documents for other employees:

1. In the **Performance Documents - Manager** pagelet, select the **Create Performance Documents** link
2. On the **Select Employees** page, select the **Create Document for Other Employees** link
3. Select the desired document **Template**.
4. Enter the search criteria.
5. Select the **Search** button.
6. In the search results, select the desired **Employee(s)**.
7. Verify the **Begin** and **End Date**.
8. Select the **Create Documents** button. (This will take you to the **Create Documents for Other Employees - Results** page. The document is accessible through the **Maintain Documents** page.)



Chapter 9 Figure 142: MSS Create Documents For Other Employees

Reviewing a Performance Plan/Document

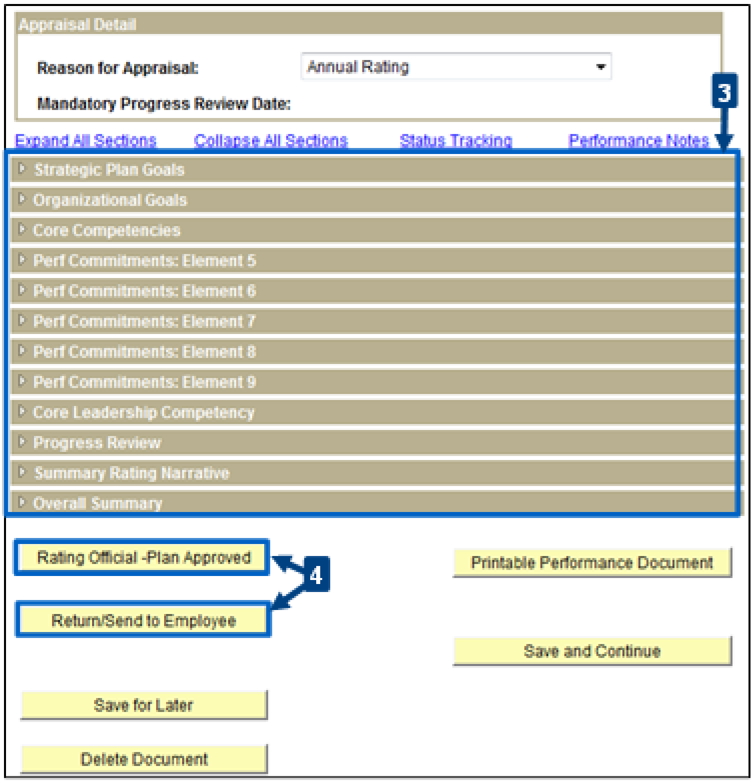
Manager tab>ePerformance pagelet>ePerformance link>Performance Management Home page

Once processed, a Performance Plan requires a Rating Official's approval before it can be submitted to the employee for final review.

To review a performance plan/document:

1. In the **Performance Documents - Manager** pagelet, select the **Maintain Performance Documents** link
2. On the **Maintain Documents** page, select **Employee** inline with the desired document.
3. On the **Maintain Performance Document** page, review the performance document for accuracy.
4. Select the **Rating Official – Plan Approved** button to Accept or the **Return to Sender/Employee** button to Reject the document.

> **Note:** Following Step 4, regardless of your choice, you will need to pass through 2 confirmation screens before you are ultimately returned to the Maintain Documents page.
>
> **If you chose to Accept:** This will send a notification to the employee under review and will change the status to Rqst Emp Plan Approval, allowing the employee to approve the plan.
>
> **If you chose to Reject:** This will send a notification to the employee under review and will keep the status as Plan In Progress, allowing the employee to make changes/corrections to the plan.



Chapter 9 Figure 143: MSS Review Performance Plan

Sending a Performance Plan/Document to a Review Official

Manager tab>ePerformance pagelet>ePerformance link>Performance Management Home page

Once an Employee and Manager have agreed upon a performance plan, the Manager (the Rating Official) will need to forward the document on to a Review Official (another MSS user).

To make a document available to a Review Official:

1. In the **Performance Documents - Manager** pagelet, select the **Maintain Performance Documents** link.
2. On the **Maintain Documents** page, select **Employee** inline with the desired document.
3. On the **Maintain Performance Document** page, select the **Make Avail to Review Official** button.
4. On the **Make Avail to Review Official** page, enter or lookup the desired **Reviewing Official**.
5. Select the **Make Avail to Review Official** button.
6. On the **Make Avail to Review Official Confirmation** page, select the **OK** button. (This will take you to the **Maintain Documents** page.)

9.4 Mid-Year Review (ESS & MSS)

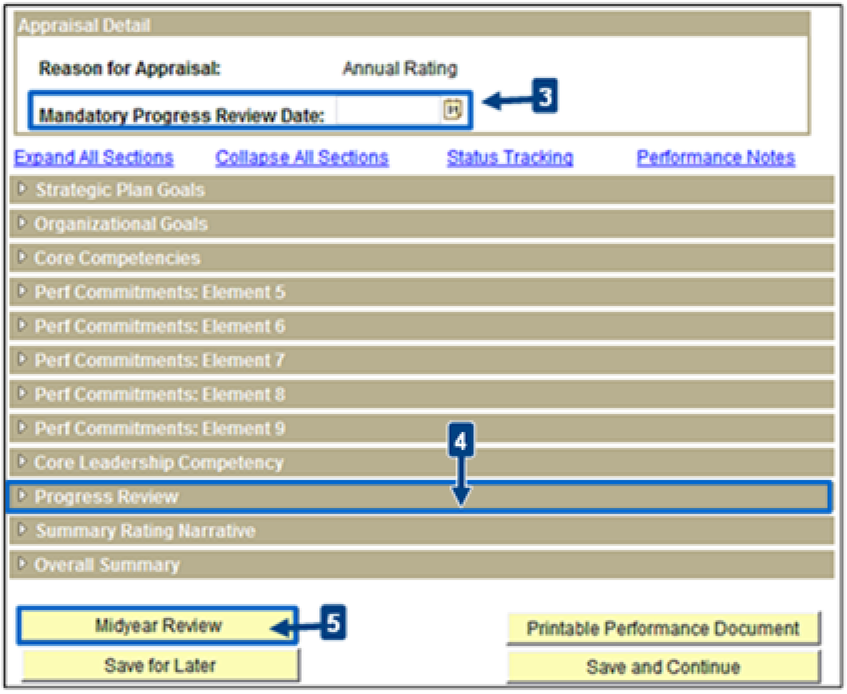
The Mid-Year Review process will vary significantly across organizations. The following is an example of the Mid-Year Review process, wherein the manager provides a Mid-Year Review and the employee acknowledges the review.

Initiating Mid-Year Review (MSS)

Manager tab>ePerformance pagelet>ePerformance link>Performance Management Home page

To initiate a Mid-Year Review:

1. In the **Performance Documents - Manager** pagelet, select the **Maintain Performance Documents** link.
2. On the **Maintain Documents** page, select **Employee** inline with the desired document.
3. On the **Maintain Performance Document** page, enter or lookup the **Mandatory Progress Review Date**.
4. Enter the employee's midyear **Progress Review**.
5. Select the **Midyear Review** button.
6. On the **Midyear Review** page, Select the **Midyear Review** button.
7. On the **Midyear Review Confirmation** page, select the **OK** button. (This will take you to the **Maintain Documents** page.)



Chapter 9 Figure 144: Initiate Midyear Review

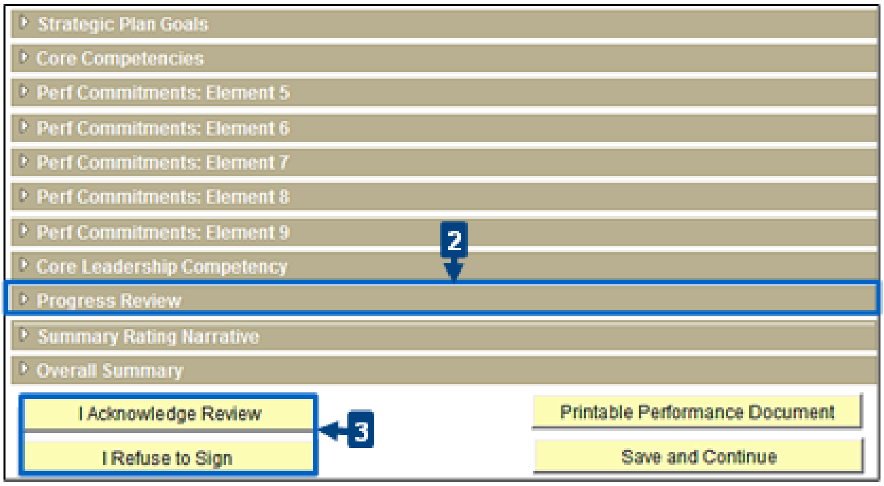
MID-YEAR REVIEW (ESS)

Employee tab>ePerformance pagelet>ePerformance link>My Performance Documents - Employee pagelet>Maintain My Performance Document link>Maintain Documents page

To acknowledge a midyear review:

1. Select your **Name** inline with the desired document.
2. On the **Maintain Performance Document** page, review the **Progress Review** entered by your Rating Official.
3. Select the **I Acknowledge Review** button to indicate approval or the **I Refuse to Sign** button to indicate disapproval. (Selecting either button will indicate that you have reviewed the document and will change the document's status to Plan Established.)

Note: Following **Step 3**, regardless of your choice, you will need to pass through two confirmation screens before you are ultimately returned to the **Maintain Documents** page.

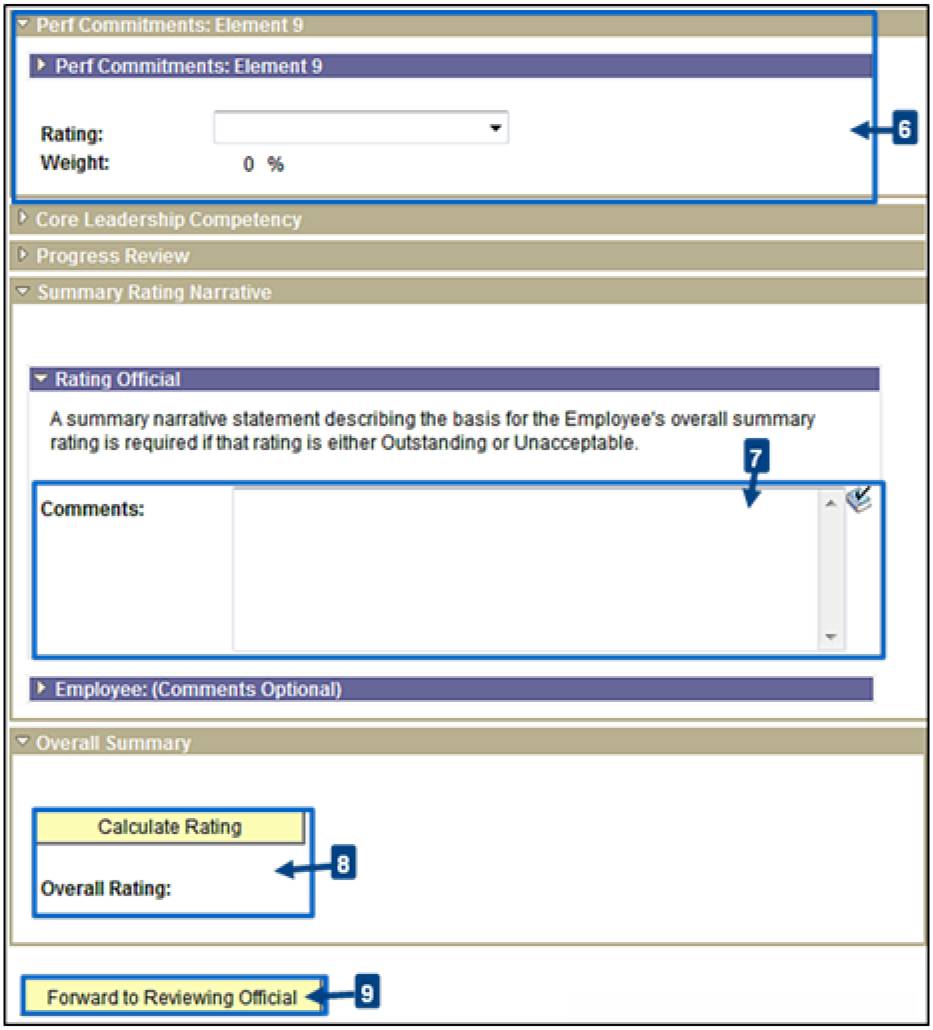


Chapter 9 Figure 145: Acknowledging A Midyear Review

9.5 FINAL PERFORMANCE REVIEW (MSS – RATING OFFICIAL)

Manager tab>ePerformance pagelet>ePerformance link>Performance Documents – Manager pagelet>Maintain Performance Documents link>Maintain Documents page

1. On the **Maintain Documents** page, select **Employee** inline with the desired document.
2. On the **Maintain Performance Document** page, select the **Input Final Ratings** button.
3. On the **Input Final Ratings** page, select the **Input Final Ratings** button.
4. On the **Input Final Ratings Confirmation** page, select the **OK** button.
5. On the **Maintain Documents** page, select **Employee** inline with the desired document.
6. On the **Maintain Performance Document** page, select ratings for all relevant **Critical Elements**/**Commitments/Goals**.
7. (If rating is Outstanding or Unacceptable): In the **Summary Rating Narrative** pagelet, enter a **Comment** explaining the rating.
8. In the **Overall Summary** pagelet, select the **Calculate Rating** button. (This will generate an average score, based on the weights and scores from Critical Elements, Commitments, Goals, etc.)
9. Select the **Forward to Reviewing Official** button.



Chapter 9 Figure 146: Maintain Performance Document Page

10. On the **Forward to Reviewing Official** page, enter or lookup the appropriate **Reviewing Official**.
11. Select the **Forward to Reviewing Official** button.
12. On the **Forward to Reviewing Official Confirmation** page, select the **OK** button. (This will transfer document ownership to the Reviewing Official and take you back to the **Maintain Documents** page. The documents status will be: Rqst Rvw Official Final Apprvl.)

Note: Once approved by the Reviewing Official, navigate back to the document and select the **Make Available to Employee** button.

9.6 Final Performance Review (MSS – Reviewing Official)

Manager tab>ePerformance pagelet>ePerformance link>Performance Documents – Manager pagelet>Maintain Performance Documents link>Maintain Documents page

Once approved, your organization's review process may require that an additional MSS user (i.e., the Reviewing Official) review the performance document before a performance assessment can be finalized.

1. On the **Maintain Documents** page, select **Employee** inline with the desired document.
2. On the **Maintain Performance Document** page, review the performance plan.
3. (To Approve): Select the **Rating Reviewed** button. (This will return the document to the original Rating Official and mark the document as Review Official Apprvd Rating.)
4. (To Reject): Select the **Return for Edits** button. (This will return the document to the original Rating Official for changes [or you may route the document to another Rating Official]).

9.7 Final Performance Review (ESS)

Manager tab>ePerformance pagelet>ePerformance link>Performance Documents – Manager pagelet>Maintain Performance Documents link>Maintain Documents page

1. On the **Maintain Documents** page, select **Your Name** inline with the desired document.
2. On the **Maintain Performance Document** page, review your final rating.
3. Select the **I Acknowledge Review** button to indicate approval or the **I Refuse to Sign** button to indicate disapproval. (Selecting either button will indicate that you have reviewed the document and will change the document's status to Plan Established.)

> **Note:** Following Step 3, regardless of your choice, you will need to pass through 2 confirmation screens before you are ultimately returned to the Maintain Documents page.

9.8 Transferring & Copying Performance Documents (MSS)

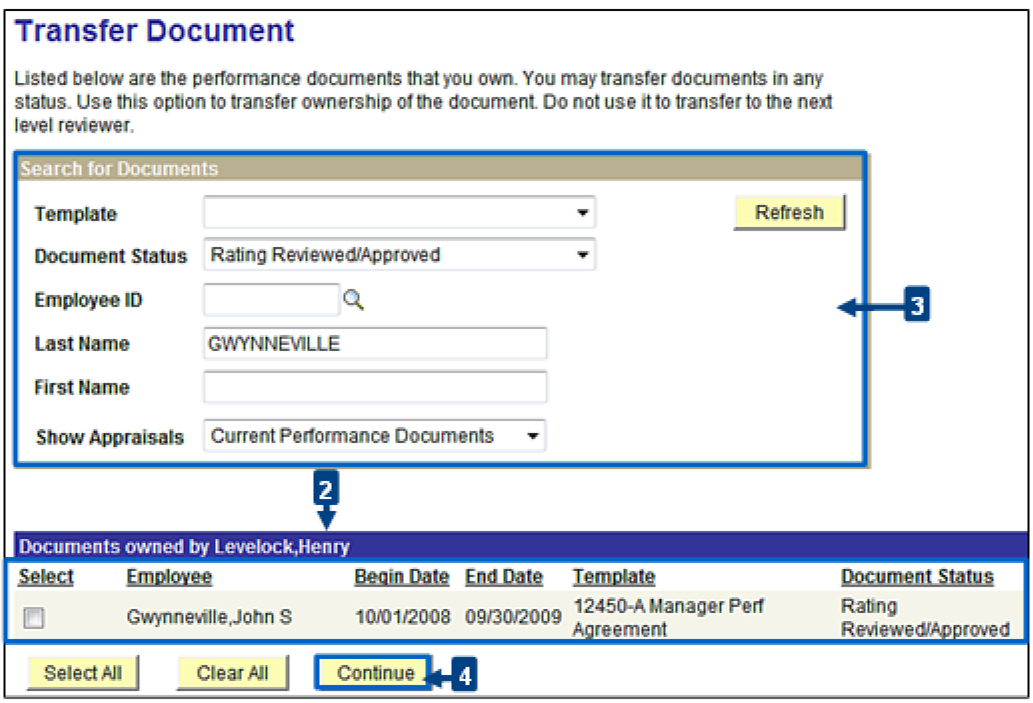
Manager tab>ePerformance pagelet>ePerformance link>Performance Management Home page

HR Connect includes functionality for Manager's to transfer documents and copy documents to other rating officials.

Transferring Performance Documents

To transfer a performance document:

1. In the **Performance Documents - Manager** pagelet, select the **Transfer Performance Documents** link.
2. On the **Transfer Document** page, **Select** documents to transfer.
3. (Optional): Filter results by entering **search criteria** and selecting the **Refresh** button.
4. Select the **Continue** button.
5. On the next **Transfer Document** page, enter or lookup the **Receiving Manager's ID**.
6. Select the **Save** button.
7. On the **Save Confirmation** page, select the **OK** button. (This will take you to the **Transfer Document** page.)



Chapter 9 Figure 147: MSS Transfer Document Page

Copying Performance Documents

To copy a performance document:

1. In the **Performance Documents - Manager** pagelet, select the **Copy Performance Documents** link.
2. On the **Copy Document** page, select the **Employee Name** inline with the document to copy.
3. On the **Select Employees** page, select **Direct Reports** you would like to copy the document to.
4. Select the **Copy Document** button. (This will take you to the **Copy Document - Results** page.)

9.9 Employee Performance Record

HR Connect's ePerformance module was designed primarily as a Front End tool for ESS and MSS users. In addition to ePerformance, HR Connect includes functionality for HRSS users to manually add and edit rows to an employee's performance record.

Manual Record ePerformance Entry (HRSS)

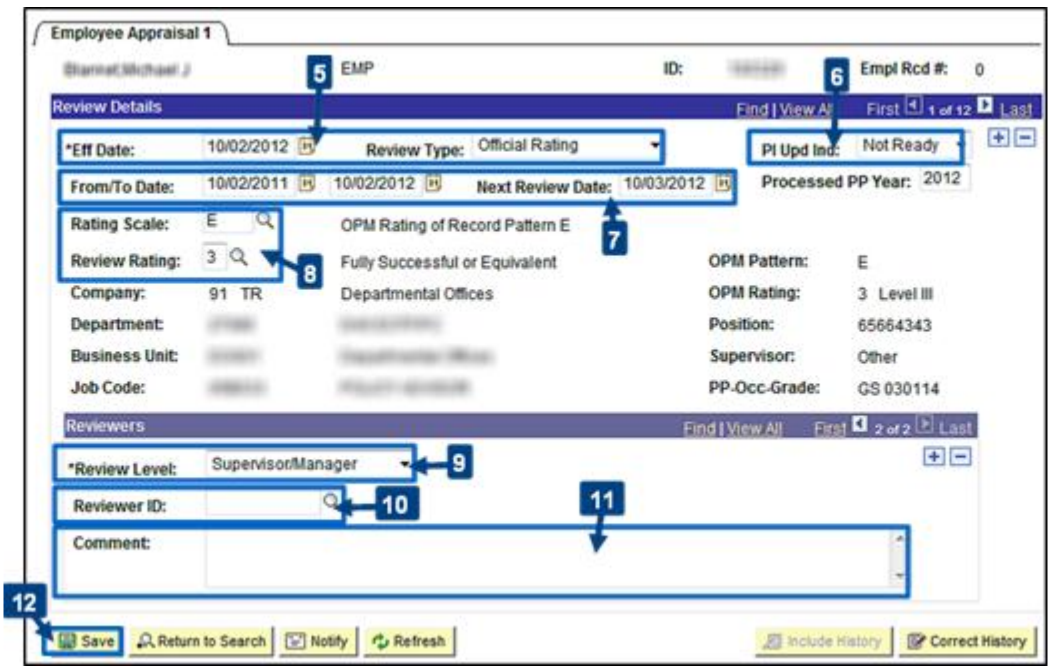
To manually edit an employee's performance record:

Menu tab>Back End Menu pagelet>Compensation menu>Employee Review History link>Review History USF link>Review History USF page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. (Optional): In the search results, select the desired employee.

> **Note:** Adding a row will create a new appraisal record. Alternatively, you may edit an existing row by selecting the Correct History button and skipping Step 4.

4. On the **Employee Appraisal** tab, select the add a row (**+**) button.
5. In the **Review Details** pagelet, Enter or select the **Eff Date** (Effective Date) and **Review Type**.
6. Select the appropriate **PI Upd Ind** status.
7. Enter or select the **From/To** and **Next Review Dates**.
8. Enter or lookup the appropriate **Rating Scale** and **Review Rating**.
9. In the **Reviewers** pagelet, select the appropriate **Review Level** (e.g., Supervisor, Self, Peer, etc.).
10. (Optional): Enter or lookup the **Reviewer ID**.
11. (Optional): Enter a reviewer **Comment**.
12. (Optional): To add an additional reviewer select the add a row (**+**) button and return to step 8.
13. Select the **Save** button. (This will refresh the **Employee Appraisal 1** tab and save your work.)



Chapter 9 Figure 148: Employee Appraisal 1 Tab

CHAPTER 10: LABOR RELATIONS

10.1 OVERVIEW

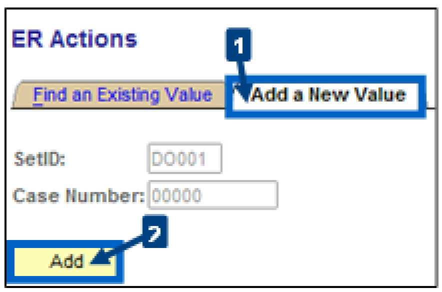
The Labor Relations feature of HR Connect allows for the tracking, management, and documentation of Disciplinary Cases (e.g., insubordination, suspensions, warnings, etc.) and Grievances (e.g., EEO discrimination, formal complaints, etc.). The processes for tracking, managing, and documenting cases and grievances appeals will be outlined in the following sub-sections.

10.2 DISCIPLINARY CASES

ADDING AND MODIFYING A DISCIPLINARY CASE

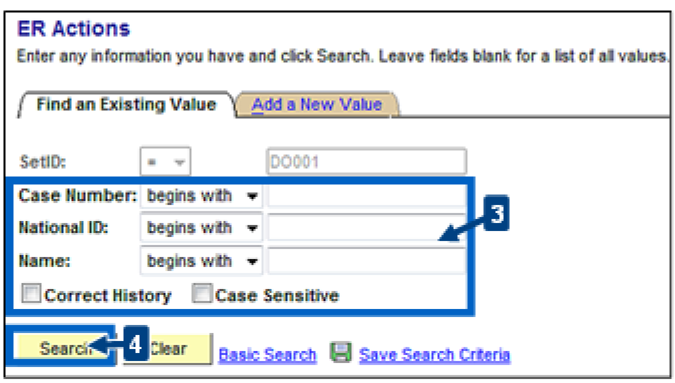
Menu tab>Workforce Administration menu>Labor Administration link>ER Actions link>ER Actions page

1. (Adding a New Case): Select the **Add a New Value** tab.
2. (Adding a New Case): Select the **Add** button. (This will take you to the **Summary** tab. Skip to **Step 5**.)



Chapter 10 Figure 149: ER Actions Add A New Value Tab

3. (Modifying an Existing Case): Enter the relevant search criteria (i.e., **Case Number**, **National ID**, and/or **Name**).
4. (Modifying an Existing Case): Select the **Search** button.



Chapter 10 Figure 150: ER Actions Find An Existing Value Tab

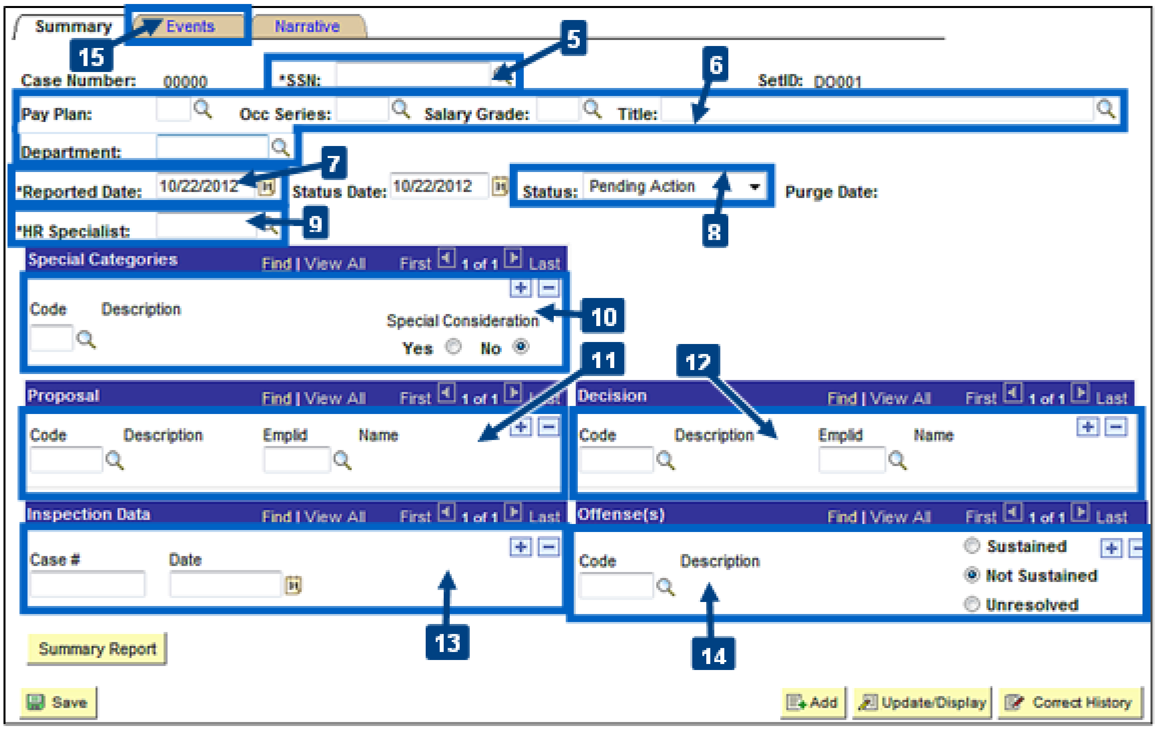
5. On the **Summary** tab, enter or verify the employee's **SSN** (Social Security Number).
6. (Optional): Verify the employee's **Pay Plan**, **Occ Series** (Occupational Series), **Salary Grade**, **Title**, and/or **Department**.
7. Enter or verify the date the offense was reported in the **Reported Date** field.
8. Select the appropriate **Status**.
9. Enter or lookup the employee ID of the **HR Specialist** working the case.

> **Note:** In Steps 10-14 you may add rows to include multiple disciplinary actions by selecting the add row (**+**) button. To remove an action row, select the remove row (**-**) button.

10. (Optional): Enter or lookup the applicable special category **Code** and whether the action requires **Special Consideration**.
11. (Optional): Enter or lookup the proposed disciplinary step **Code** and the ID of the associated employee (**EmplID**).
12. (Optional): Enter or lookup the **Code** and employee ID (**EmplID**) associated with decisions for the proposed disciplinary steps in **Step 11**.
13. (Optional): Enter or verify the **Case #s** (Case Numbers) and **Dates** associated with **Inspection Data**.
14. (Optional): Enter or lookup the **Code** relating to each offense and indicate whether the offense was **Sustained**, **Not Sustained**, or **Unresolved**.

> **Note:** To print an **ER Action Case Summary Report**, select the **Summary Report** button and, on the following confirmation page, select the **Yes** button. This will direct you to the **Report Output** page.

15. Select the **Events** tab.

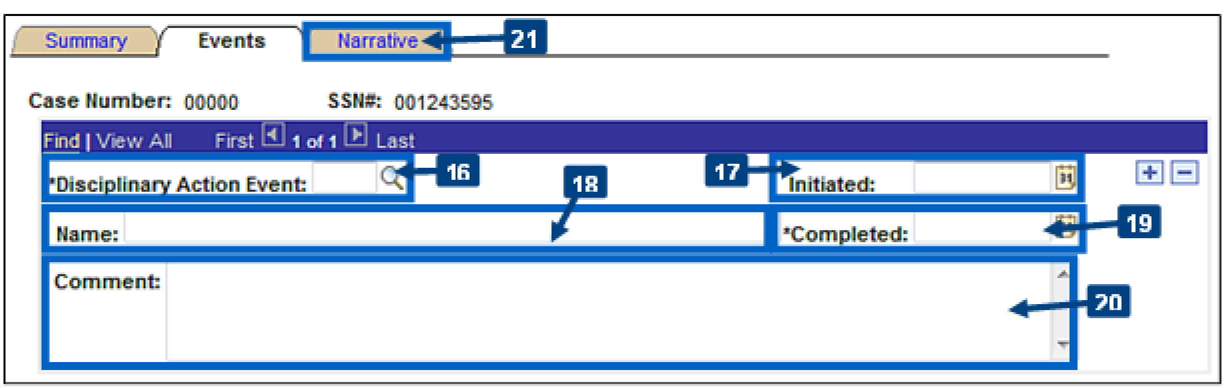


Chapter 10 Figure 151: Disciplinary Action Summary Tab

16. On the **Events** tab, enter or lookup the appropriate **Disciplinary Action Event** code.
17. Enter or verify the date the disciplinary action was **Initiated**.
18. Enter or verify the **Name** of the individual who worked the action.
19. Enter or verify the date the disciplinary action was **Completed**.
20. (Optional): Enter a **Comment** about the disciplinary event.

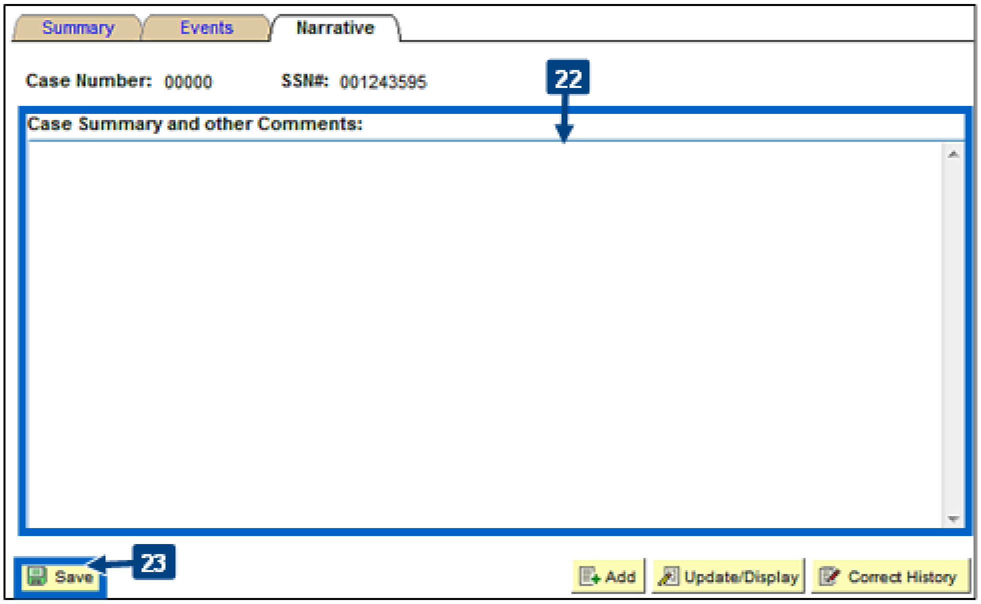
Note: In Steps 10-14 you may add rows to include multiple disciplinary actions by selecting the add row (+) button. To remove an action row, select the remove row (-) button.

21. Select the **Narrative** tab.



Chapter 10 Figure 152: Disciplinary Action Events Tab

22. On the **Narrative** tab, enter any appropriate text in the **Case Summary and Other Comments** field (text from e-mails, letters, etc.).
23. Select the **Save** button. (This will save your work and refresh the **Narrative** tab.)



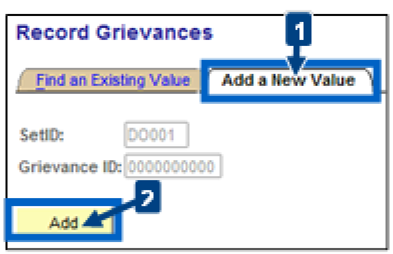
Chapter 10 Figure 153: Disciplinary Action Narrative Tab

10.3 Grievances

Adding and Modifying a Grievance

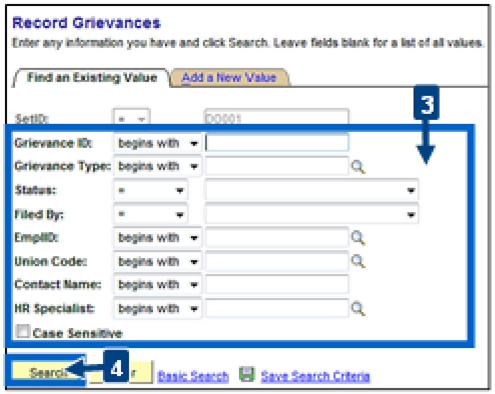
Menu tab>Workforce Administration menu>Labor Administration link>Record Grievances link>Record Grievances page

1. (Adding a New Grievance): Select the **Add a New Value** tab.
2. (Adding a New Grievance): Select the **Add** button. (This will take you to the **Summary** tab. Skip to **Step 5**.)



Chapter 10 Figure 154: Add A New Grievance

3. (Modifying an Existing Case): Enter the relevant search criteria (e.g., **Grievance ID**, **Grievance Type**, **HR Specialist**, etc.).
4. (Modifying an Existing Case): Select the **Search** button.

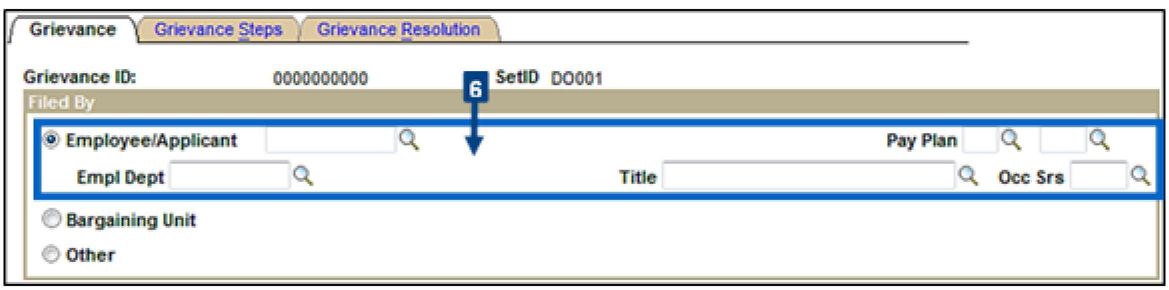


Chapter 10 Figure 155: Find An Existing Grievance

5. On the **Grievance** tab, select the type of entity (**Employee/Applicant**, **Bargaining Unit**, or **Other**) that filed the grievance.

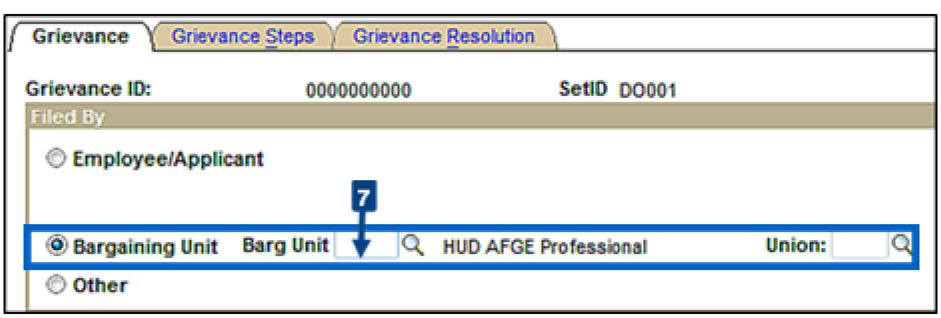
Note: The fields that appear in the Field By pagelet will vary based on your choice in Step 5. These variants are presented in Steps 6-8.

6. (If you selected Employee/Applicant): In the **Field By** pagelet, enter or lookup the Employee/Applicant and verify the **Pay Plan**, **Empl Dept** (Employee Department), **Title**, and **Occ Srs** (Occupational Series).



Chapter 10 Figure 156: Grievance Tab – Employee/Applicant Selected

7. (If you selected Bargaining Unit): In the **Field By** pagelet, enter or lookup the **Barg Unit** (Bargaining Unit) and **Union**.

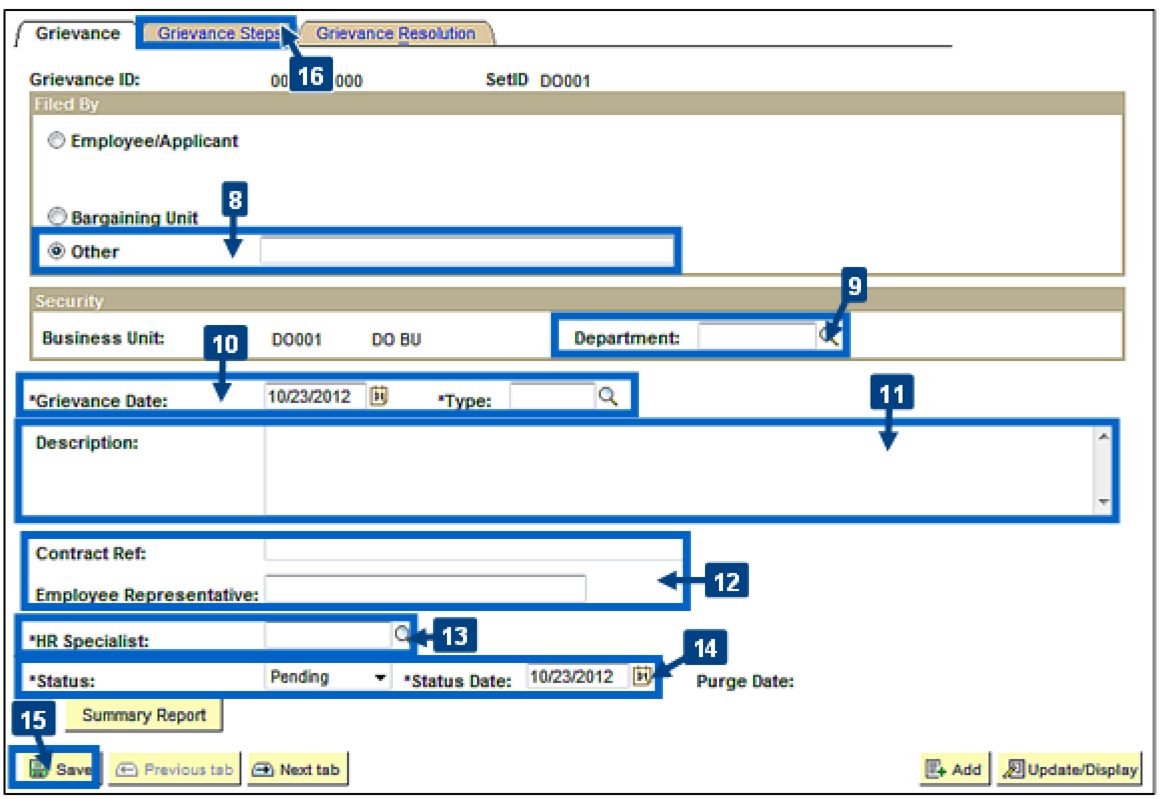


Chapter 10 Figure 157: Grievance Tab – Bargaining Unit Selected

8. (If you selected Other): In the **Field By** pagelet, enter the source of the grievance in the **Other** field.
9. In the **Security** pagelet, enter or lookup the **Department** ID.
10. Enter or verify the **Grievance Date** and **Type**.
11. (Optional): Enter or verify a narrative describing the grievance in the **Description** field.
12. (Optional): Enter or verify the relevant labor **Contract Ref** (Contract Reference) and **Employee Representative**.
13. Enter or verify the **HR Specialist** working the grievance.
14. Select or verify the grievance **Status** and **Status Date**.

Note: To print a Grievance Summary Report, select the **Summary Report** button and, on the confirmation page that follows, select the **Yes** button. This will direct you to the Report Output page.

15. Select the **Save** button.
16. Select the **Grievance Steps** tab.

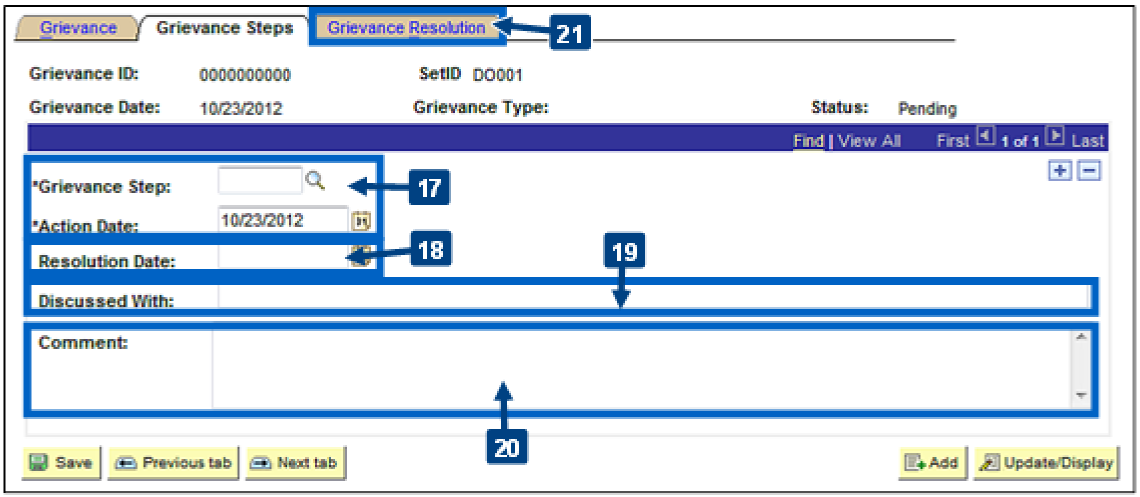


Chapter 10 Figure 158: Grievance Tab – Other Selected

17. On the **Grievance Steps** tab, enter or verify the appropriate grievance **Step** and **Action Date**.
18. (When the grievance is resolved): Enter or select the **Resolution Date**.
19. (Optional): Enter or verify the name of the individual (Last, First Middle) with whom the grievance was **Discussed**.
20. (Optional): Enter or verify the narrative regarding this grievance step in the **Comment** field.

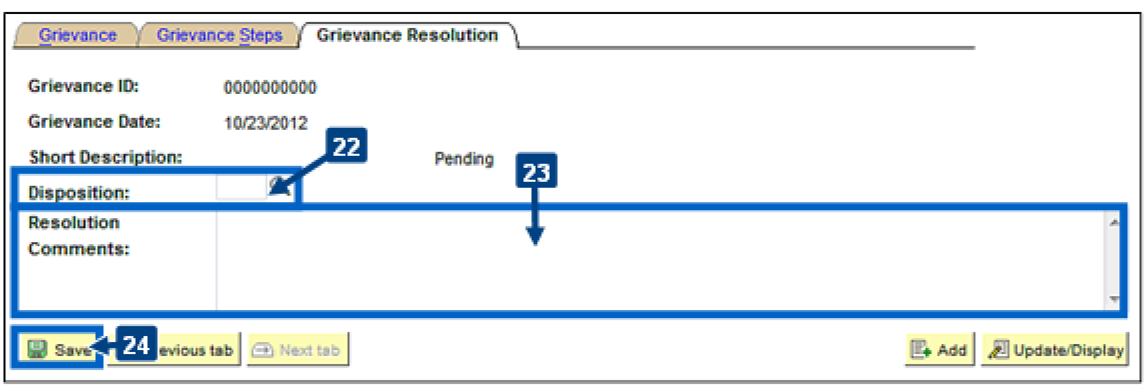
Note: In **Steps 17-20** you may add rows to include multiple grievance steps by selecting the add row (**+**) button. To remove a grievance step row, select the remove row (**-**) button.

21. Select the **Grievance Resolution** tab.



Chapter 10 Figure 159: Grievance Steps Tab

22. (If the grievance is resolved): On the **Grievance Resolution** tab, enter or lookup the resolution type in the **Disposition** field.
23. (If the grievance is resolved): Enter or verify narrative comments in the **Resolution Comments** field.
24. Select the **Save** button. (This will save your work and refresh the **Grievance Resolution** tab.)



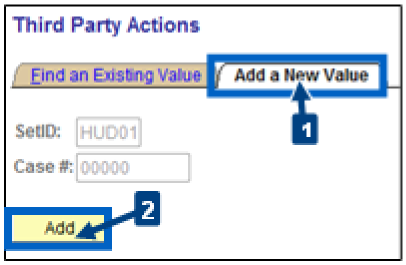
Chapter 10 Figure 160: Grievance Resolution Tab

10.4 Third Party Actions

Adding and Modifying a Third Party Action

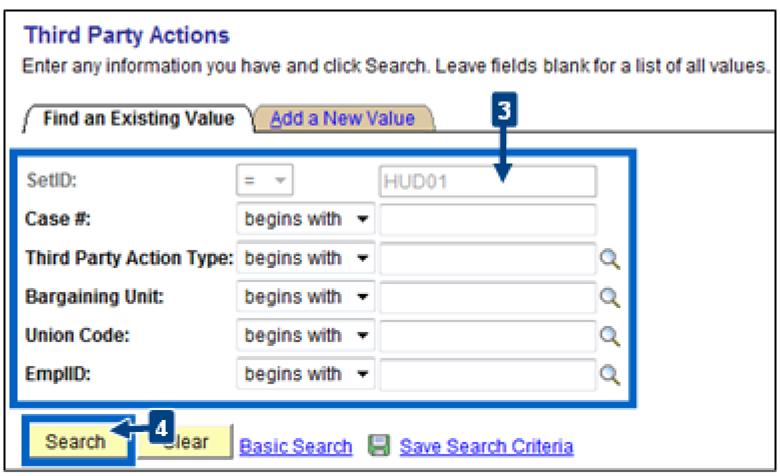
Menu tab>Workforce Administration menu>Labor Administration link>Record Grievances link>Record Grievances page

1. (Adding a Third Party Action): Select the **Add a New Value** tab.
2. (Adding a Third Party Action): Select the **Add** button. (This will take you to the **Actions** tab. Skip to **Step 5**.)



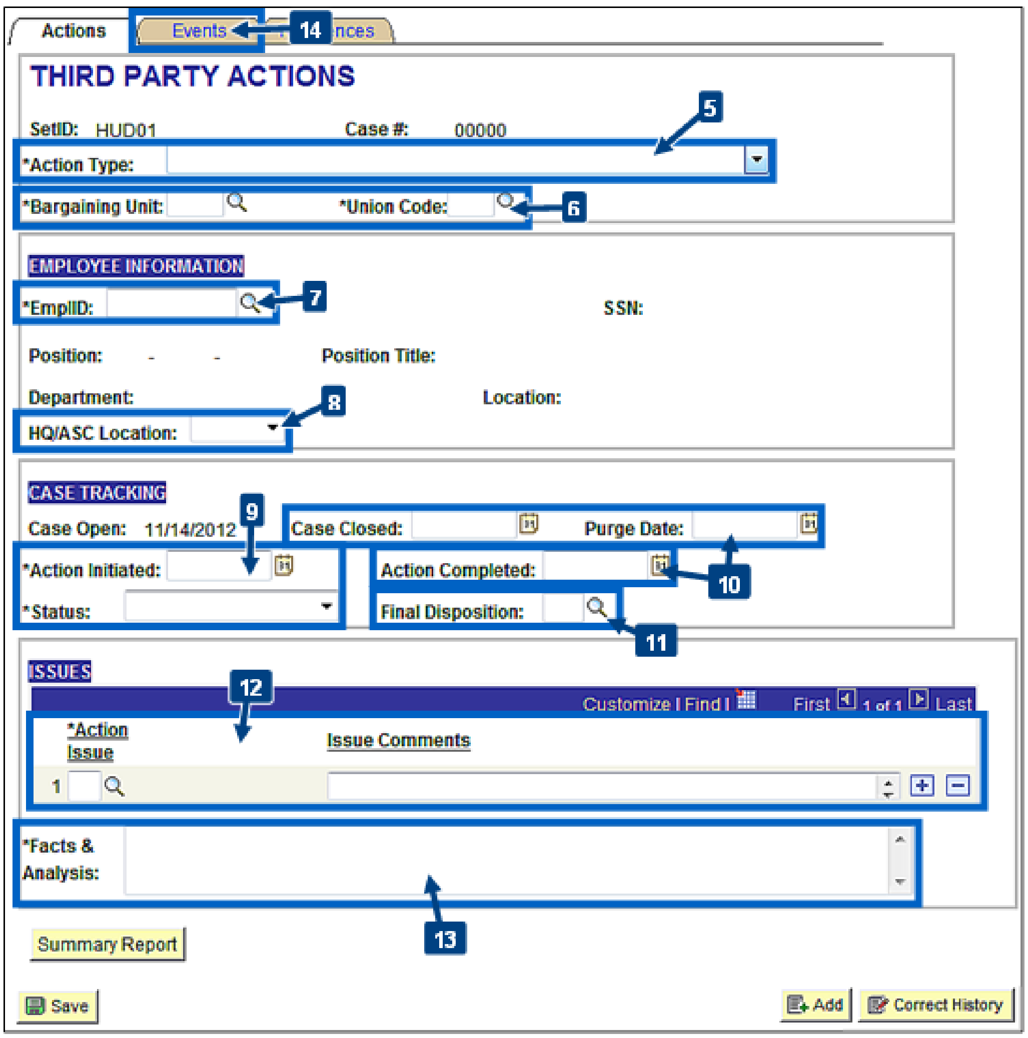
Chapter 10 Figure 161: Add A New Third Party Action

3. (Modifying an Existing Action): Enter the relevant search criteria (e.g., **Case #**, **Third Party Action Type**, etc.).
4. (Modifying an Existing Action): Select the **Search** button.



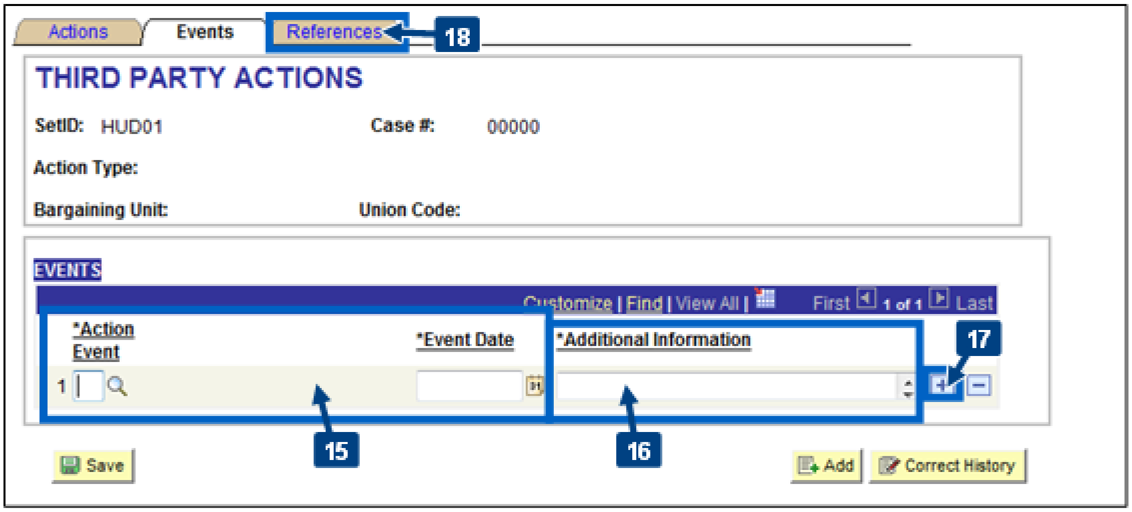
Chapter 10 Figure 162: Find An Existing Third Party Action

5. On the **Actions** tab, select the **Action Type**.
6. Enter or lookup the **Bargaining Unit** and **Union Code**.
7. In the **Employee Information** pagelet, enter or lookup the employee's ID (**EmplID**).
8. Select the appropriate **HQ/ASC Location**.
9. In the **Case Tracking** pagelet, enter or select the **Action Initiated** date and case **Status**.
10. (If applicable): Enter the date when the case was **Closed** or **Purged** and when the action was **Completed**.
11. (If applicable): Enter or lookup the **Final Disposition**.
12. (If applicable): In the **Issues** pagelet, enter or lookup the **Action Issue** and **Issue Comments**.
13. Enter details about the Third Party in the **Facts & Analysis** field.
14. Select the **Events** tab.



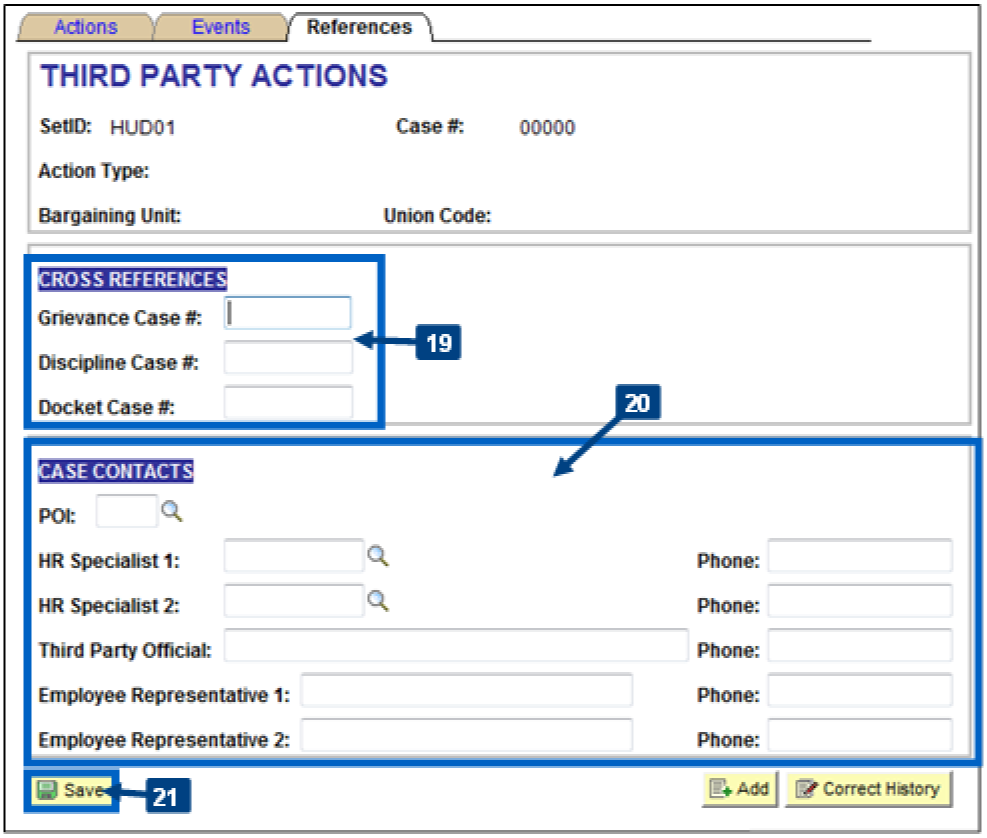
Chapter 10 Figure 163: Third Party Actions – Actions Tab

15. On the **Events** tab, enter or lookup the **Action Event** code and **Event Date**.
16. Enter **Additional Information** pertaining to the event.
17. (Optional): Add additional events by selecting the add a row (**+**) button and return to **Step 15**.
18. (Optional): Select the **References** tab.



Chapter 10 Figure 164: Third Party Actions – Events Tab

19. (Optional): On the **References** tab, enter relevant cross referenced **Case #'s**.
20. (Optional): Enter or lookup **Case Contacts** and provide contact **Phone** numbers.
21. Select the **Save** button. (This will save your work and refresh the tab you are currently on.)

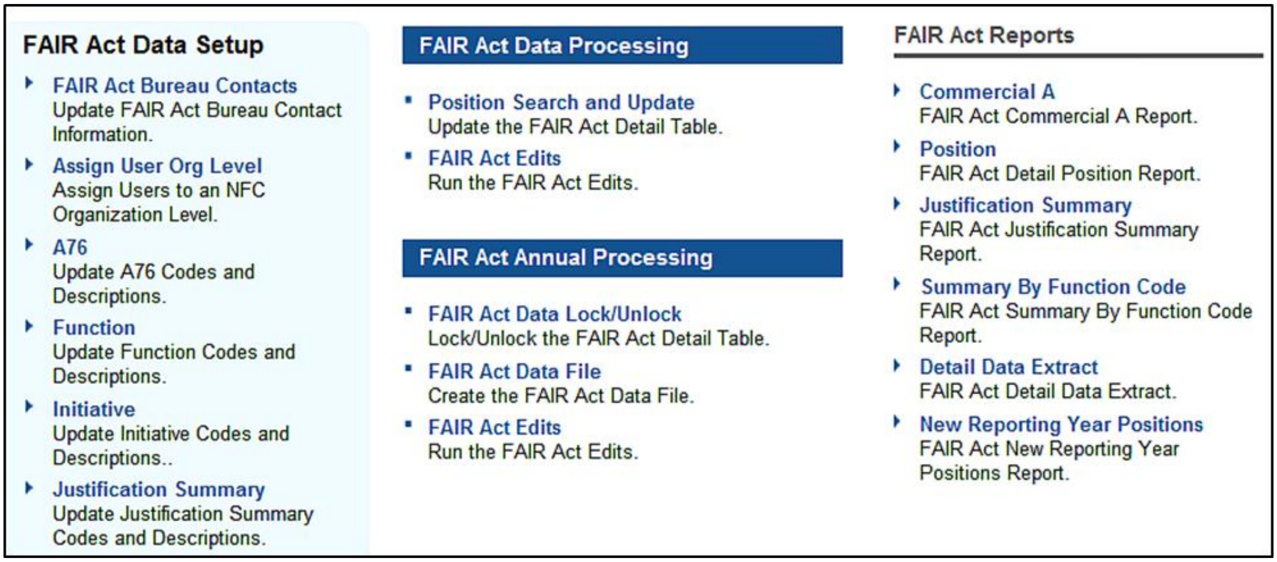


Chapter 10 Figure 165: Third Party Actions – References Tab

CHAPTER 11: FAIR ACT

11.1 OVERVIEW

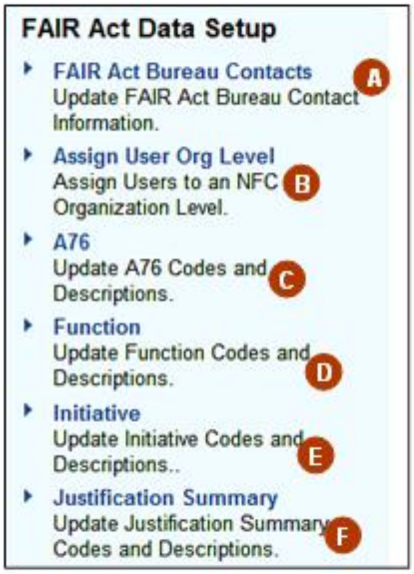
The **FAIR Act** tab consists of tools that allow designated HR employees to manage and support the various activities necessary to maintain compliance with the Federal Activities Inventory Reform (FAIR) Act of 1998. The **FAIR Act** tab consists of 4 pagelets: **FAIR Act Data Setup**, **FAIR Act Data Processing**, **FAIR Act Annual Processing**, and **FAIR Act Reports**. These pagelets will be discussed separately in the following subsections.



Chapter 11 Figure 166: FAIR Act Tab Pagelets

11.2 FAIR ACT DATA SETUP PAGELET

The tools accessible from the FAIR Act Data Setup pagelet allow users to update their organization's FAIR Act data. Specifically, these tools allow updates to FAIR Act Bureau Contacts, a user's NFC Organization Level, A76 Codes, Function Codes, initiative Codes, and Justification Summary Codes. Below are brief descriptions of each function:

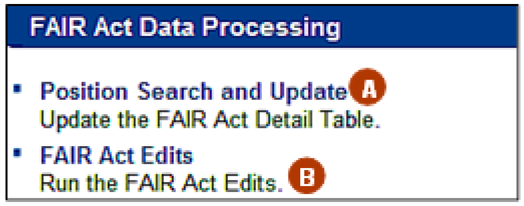


Chapter 11 Figure 167: FAIR Act Data Setup Pagelet

A. **FAIR Act Bureau Contacts**– Add or update FAIR Act contacts for each available Bureau/Agency. This tool generates contact information based on data in the employee's most recent record.
B. **Assign User Org Level**– Add or modify a user's NFC organization level within a given bureau.
C. **A76**- Add or update the effective date, status, and description associated with A76 studies that are being conducted at your organization. Positions that are subject to these studies will have an A76 value assigned to them.
D. **Function**- Add or update the function code, effective date, status, and description for positions. Each function code consists of a letter, followed by a numbered substring for further specification.
E. **Initiative**- Add or update the initiative code, effective date, status, and description for positions classified as Status Commercial or Reason E, that are to be part of a major reorganization or restructuring initiative.
F. **Justification Summary**- Update the effective date, description, and status of justification summary codes designed to further justify and support various combinations of status and reason codes.

11.3 FAIR Act Data Processing Pagelet

The FAIR Act Data Processing pagelet provides search tools for locating and updating populated FAIR Act data. These include the Position Search & Update tool and FAIR Act Edits tool. Brief description of each function is provided below:

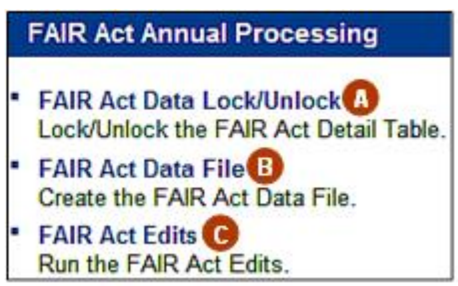


Chapter 11 Figure 168: FAIR Act Data Processing Pagelet

A. **Position Search and Update**– This tool allows users to search for existing FAIR Act positions according to one or more of the following categories: Criteria, Value, and/or Value To Range. After selecting one or more positions, this tool allows for the modification of that position's FAIR Act values (e.g., Function Code, Reason Code, A-76 Study, Initiative, COTR, etc.).
B. **Fair Act Edits**– This tool allows users to generate a report of all the FAIR Act edits performed in the current reporting year.

11.4 FAIR Act Annual Processing Pagelet

The FAIR Act Data Processing pagelet provides tools for maintaining control of the data contained within the FAIR Act Detail Table. These include the FAIR Act Data Lock/Unlock tool, FAIR Act Data File tool, and FAIR Act Edits tool. Brief descriptions of these features are provided below:



Chapter 11 Figure 169: FAIR Act Annual Processing Pagelet

A. **FAIR Act Data Lock/Unlock**– Once all errors are corrected in the FAIR Act Detail Table, this tool can be used to lock and unlock the FAIR Act Detail Table. Locking the table prevents any changes from being made.
B. **Fair Act Data File**– This tool allows users to generate a PDF or Excel file containing all of FAIR Act position data available for your organization.
C. **Fair Act Edits**– This tool allows users to generate a report of all the FAIR Act edits in the current reporting year.

11.5 FAIR Act Reports Pagelet

The FAIR Act Data Report pagelet provides access to all of the available FAIR Act reports. These reports include Commercial A, Position, Justification Summary, Summary By Function Code, Detail Data Extract, and New Reporting Year Positions. Brief descriptions of these reports are provided below:

Chapter 11 Figure 170: FAIR Act Reports Pagelet

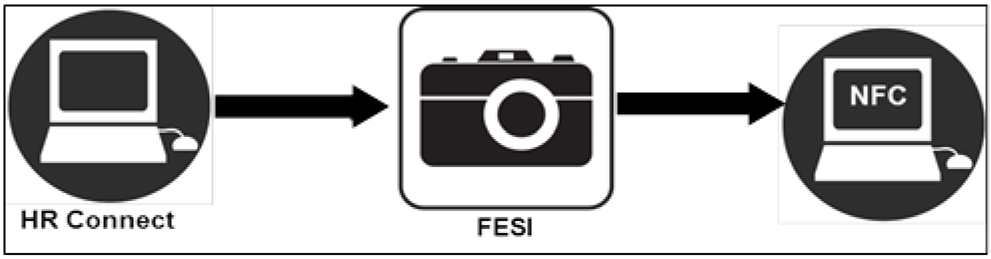
A. **Commercial A**– Generates a report of newly designated Commercial A Positions for a reporting year. To run a report you must specify a Bureau, Reporting Year, and Organizational Level.
B. **Position**– Generate a report of FAIR Act position information (e.g., position number, name, occupational series, function, organization code, position location, etc.). To run a report you must specify a Bureau, Reporting Year, and Organizational Level.
C. **Justification Summary** – Generate a report of a position's justification summary information (e.g., abbreviation, occupational series, reason, justification summary, etc.). To run a report you must specify a Bureau, Reporting Year, and Organizational Level.
D. **Summary By Function Code**– Generate a report of a position's function code information (e.g., function code, description, status, etc.). To run a report you must specify a Bureau, Reporting Year, and Organizational Level.
E. **Detail Data Extract**– Generate a report that contains a complete line-by-line listing of your Detail table. To run a report you must specify a Bureau, Reporting Year, and Organizational Level.
F. **New Reporting Year Positions**– Generate a report that shows all active and encumbered positions added since the last population of the Detail Table. To run a report you must specify a Bureau, Reporting Year, and Organizational Level.

CHAPTER 12: PAYROLL

12.1 OUTBOUND PAYROLL INTERFACE

OVERVIEW

The Front End System Interface (FESI) captures a snapshot of data on the front-end system (i.e., HR Connect) and transmits that data to the system of record (i.e., NFC). This allows users to enter data via HR Connect and have that data transmitted to NFC on a regular processing schedule.



Chapter 12 Figure 171: Taking A Snapshot Of HR Connect & Submitting It To NFC

HR Connect does not transmit an action to NFC until the processing cycle for its effective pay period begins. Below is a sample payroll and interface-processing calendar. Processing between NFC and HR Connect is the same for each two week payroll-processing period.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	
	FIRST PASS PINE PINE	PINE	PINE	PINE	PINE	T&A'S ENTERED & TRANSMITTED	PP 14 (WK2)

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	
TIME	TIME PINE	TIME PINE	TIME PINE	TIME PAYE PINE	TIME PAYE PINE		(WK 1)
							PP 15
BEAR	EFT PAYDAY			PAPER CHECK PAYDAY			(WK 2)

Chapter 12 Figure 172: Payroll Personnel Processing Calendar

The following are definitions, provided by the NFCs Payroll/Personnel Manual, for the acronyms used in the above image:

- **PINE**- The Personnel Edit Subsystem (**PINE**) edits data released into FESI before it is applied to the Payroll/Personnel System. **PINE** processes personnel actions and payroll transactions on the first Saturday of the pay period and during each work week (Monday through Friday).
- **T&A**- Time & Attendance (**T&A**) data are received every two weeks from an agency's time and attendance system through FESI.
- **TIME**- Time and Attendance Validation System (**TIME**) performs validates and edits **T&A** data before it can be applied to the Payroll Personnel System database.
- **BEAR**- Bi-weekly Examination Analysis and Reporting (BEAR) analyzes payroll and personnel transactions that occur during a pay period and closes out the previous pay period. BEAR processes on the second Sunday following the associated pay period (e.g., The BEAR in the above image occurs in PP15, but applies to PP14).
- **PAYE**- Payroll Processing System (**PAYE**) processes payroll, personnel, and **T&A** data before the end of each pay period. **PAYE** processes data on the first Thursday and Friday of a pay period.
- **EFT**- Electronic Funds Transfer (**EFT**; i.e., Direct Deposit) or payday occurs on the second Monday of the following pay period (e.g., the **EFT** in the image above applies to PP14, but occurs during PP15).

Transaction Processing

Transactions are entered into HR Connect on a daily basis. These transactions are then transmitted to NFC for payroll processing. The status set in the Payroll Interface Update Indicator (**PI Upd Ind**) field on the **Data Control** tab of an employee's record determines when a transaction is ready to be sent to NFC.

Once a row has been inserted into HR Connect, its update indicator will default to **Not Ready**. A post-dated record (i.e., with a future date) or a record marked as **Not Ready** will not be transmitted to NFC.

To submit a record to NFC, the **PI Upd Ind** field must be set to **Ready**. To set the indicator to ready, its associated **PAR Status** must be set to **HR**.

> **Note:** Make sure the effective date of the action is in the current or prior cycle before saving the action. If the post-effective date PAR action is saved as Not Ready, users must use the Correct History mode to change the PI Upd Ind field to **Ready**.

Chapter 12 Figure 173: Data Control Tab PI Upd & PAR Status Fields

Once submitted, FESI will automatically convert the record's status to **Processed** to reflect that the record has been transmitted to NFC.

> **Note:** A Processed status indicates that the batch file was sent to the NFC for processing, not that NFC has finished processing the data.

SINQ Reports

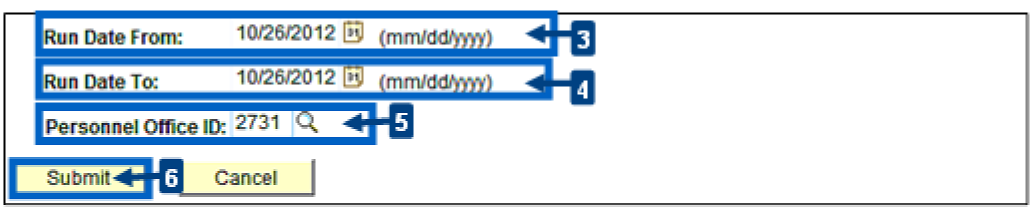
The outbound transmission to NFC will generate Suspense, Inquiry, and Correction System (SINQ) reports. SINQ reports are generated when a transaction fails PINE validation. Corrections to such transactions should be made in HR Connect, not in SINQ.

The following SINQ reports are available in HR Connect via the **Bureau Reports** pagelet on the **HR** tab:

- **SINQ Document Type Count Rpt**- Generate a report on the number of SINQ errors per document type within a given timeframe. This report may be sorted by POI.
- **SINQ Error Message Count Rpt**- Generate a report on the number of unique error messages per document type within a given timeframe. This report may be sorted by sub-agency, POI, document type, and error code.
- **SINQ Summary by User ID Rpt**- Generate a report of SINQ errors by User ID within a given timeframe. This report may be sorted by sub-agency, POI, and document type.

All three reports are generated using the following generic procedure:

1. Select the **HR** tab.
2. In the **Bureau Reports** pagelet, select the desired **SINQ** report.
3. On the **SINQ Document Type Count Report** page, enter or select the desired **Run Date From** date.
4. Enter or select the desired **Run Date To** date**.**
5. Enter or select the desired **Personnel Office ID**.
6. Select **Submit**.



Chapter 12 Figure 174: SINQ Document Type Count Report

7. On the **Report Output** tab, select the desired report. (This will open the selected SINQ report.)

Note: It may take some time for the report to generate. Wait a few minutes and then select the **Check for New Reports** button and repeat Step 7.

12.2 Inbound Payroll Interface

Overview

The goal of the Inbound Payroll Interface is to insert the NFC automatic transactions into HR Connect.

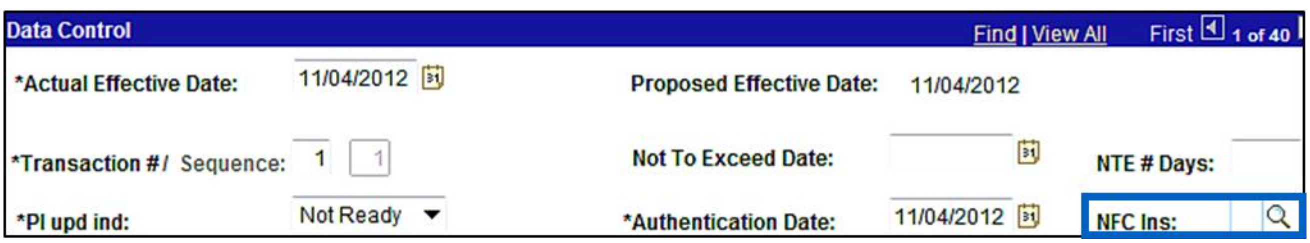
Some NFC generated automatic actions require insertion into HR Connect by the Inbound Payroll Interface process. These actions correspond to the following Nature of Action (NOA) codes:

- **880**- Change in Tenure Group
- **882**- Change in SCD (Service Computation Date)
- **891**- General Manager (GM) Within Grade Increase (WGI)
- **892**- Within Grade Increase (WGI)
- **894**- Pay Adjustment
- **895**- Locality Payment
- **903**- Change in Data Element

Prior to being loaded into HR Connect, incoming data from NFC is checked to ensure all necessary information is included. NFC automated actions are generated each pay period following BEAR processing.

To maintain data integrity, all future actions based on the insertion of an NFC-generated action have an indicator (NFC Insertion; **NFC Ins**) to identify any insertions or modifications needed or conducted. The available **NFC Ins** indicator values are:

- **I**- Inserted for an NFC generated action.
- **M**- Modified by an NFC generated action.
- **N**- Needs a manual modification for NFC Insertion.
- **R**- Record has been reviewed for NFC insertion.

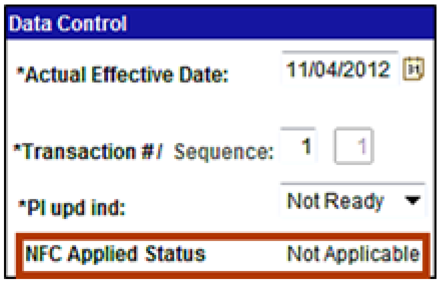


Chapter 12 Figure 175: Data Control Tab NFC Ins Field

Transaction Processing

A full transaction between HR Connect and NFC follows these generic steps:

1. NFC receives a data file from HR Connect via FESI.
2. NFC runs a PINE to validate data.
3. NFC processes the data.
4. NFC communicates a status code for the processed action back to HR Connect.
5. The Inbound Interface program updates the **NFC Applied Status** field on the **Data Control** tab of the relevant employee's record.



Chapter 12 Figure 176: Data Control Tab NFC Applied Status

NFC Applied Status field values are:

- **DI All Match-** Indicates that the record has been successfully sent to NFC and that HR Connect and NFC have matching data.
- **DI Mismatch-** Indicates that the record has been successfully sent to NFC, but that there is a data mismatch between HR Connect and NFC.
- **Pending-** Indicates that the record has been successfully sent to NFC, but has not yet been applied.
- **Not Applicable-** Indicates that the action has not yet been sent to NFC.

Address Changes

Address changes may be conducted in HR Connect or received from NFC via the inbound interface. Address changes originating from NFC will automatically be inserted into HR Connect. In HR Connect these changes can be made through Employee Self Service (ESS).

The Inbound Payroll Interface will overwrite address information on the current action and any relevant pending actions. Address information will be attached to the last most recent action.

Payroll Interface Reports

There are several reports available outside of HR Connect that can aid in verifying information processed inbound to HR Connect. Inbound reports, generated from NFC to HR Connect that identify discrepancies between NFC and HR Connect are shown below. Please note that that while visible, some of the reports listed below have been retired or moved to other locations within HR Connect.

- **History Correction Update Process (HCUP) Report**- Designed to correct past dated transactions in HR Connect and NFC.
- **Mis-Match Report**- Identifies values that were transmitted to NFC from HR Connect that did not match, and specifies the value that was applied to the NFC database.
- **Pending Transaction Report**- Shows details of actions that have been transmitted to NFC through the interface from HR Connect, but have not been applied to the NFC database.
- **Auto Action Summary Report**- Shows details of actions that have been transmitted to NFC through the interface from HR Connect, but have not been applied to the NFC database.
- **Auto Action 903 Report**- Identifies all of the NOA 903 actions generated directly by NFC that are not in HR Connect after BEAR runs.
- **Auto Action Audit Report**- Lists all of the automatic actions returning from NFC that do not meet HR Connect validation, and are not inserted into HR Connect
- **Database to Database Compare Report**- Created daily using a download from NFC Table 102.

Note: Some of the Payroll Interface Reports may have been retired or moved to a different location in your version of HR Connect.

There are also Payroll Interface reports that can be generated from the **Bureau Reports** pagelet, on the **HR** tab, within HR Connect. These reports are:

- **PI Auto Action Error Report**- Generate a report of inbound interface actions that were **NOT** inserted into HR Connect within a given timeframe. This report may be filtered by POI office.
- **PI Auto Action Insert Report**- Generate a report of inbound interface actions that were inserted into HR Connect within a given timeframe. This report may be filtered by POI office.
- **PI Auto Action Report**- Generate a report of all inbound payroll interface actions requiring manual modification (**NFC Insert Indicator = N**) within a given timeframe. This report may be filtered by POI office.
- **PI Auto Action Report**- Generate a report of all inbound payroll interface actions within a given timeframe. This report may be filtered by POI office.
- **PI Pay Document Error Report**- Generate a report of all inbound payroll interface pay document transaction errors within a given timeframe. This report may be filtered by POI office.

12.3 Identifying SINQ Errors

Overview

SINQ Searches may be conducted to view and correct for SINQ errors without having to leave HR Connect. A SINQ search is limited so that only SINQs originating in HR Connect may be worked within HR Connect. Search functionality is available in the Back End Menu; though accessibility is limited depending on your role.

HR Connect provides two SINQ Searches:

- PINE SINQ Search
- PMSO SINQ Search

The following subsections provide walkthroughs for conducting a PINE or PMSO search.

PINE SINQ Search

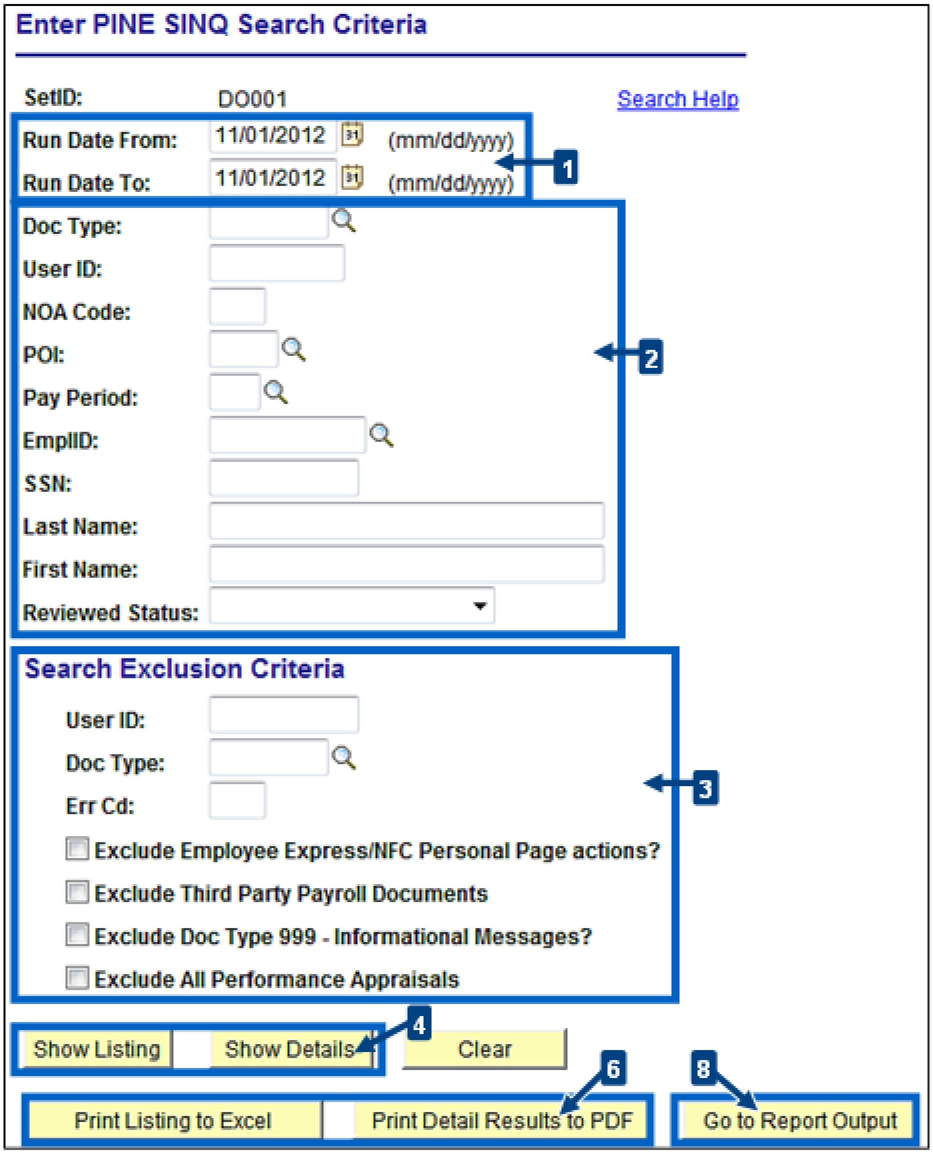
The PINE SINQ Search identifies actions that failed to pass through Personnel Edit Subsystem (PINE) validation.

To run a PINE SINQ Search:

Menu tab>Organizational Development menu>Position Management link>PINE SINQ Search link>Enter PINE SINQ Search Criteria page

1. Specify the **Run Date From** and **To** dates.
2. (Optional): Enter the relevant search criteria (e.g., **Document Type**, **User ID**, **NOA Code**, **POI**, **Pay Period**, **Employee ID**, etc.).
3. (Optional): Enter **Search Exclusion Criteria** (e.g., **User ID**, **Doc Type**, **Error Code**, **Performance Appraisals**, etc.).
4. Select the **Show Listing** or **Show Details** buttons. (This will take you to a listing of SINQ messages matching your search criteria.)
5. (To print your results): On the listing results page, select the **Return to Search** button.

6. (To print your results): Select the **Print Listing to Excel** or **Print Detail Results to PDF**.
7. (To print your results): In the confirmation message, select the **OK** button.
8. (To print your results): Select the **Go to Report Output** button. (This will take you to the Report Output tab where you may retrieve your printed listing.)



Chapter 12 Figure 177: PINE SINQ Search Form

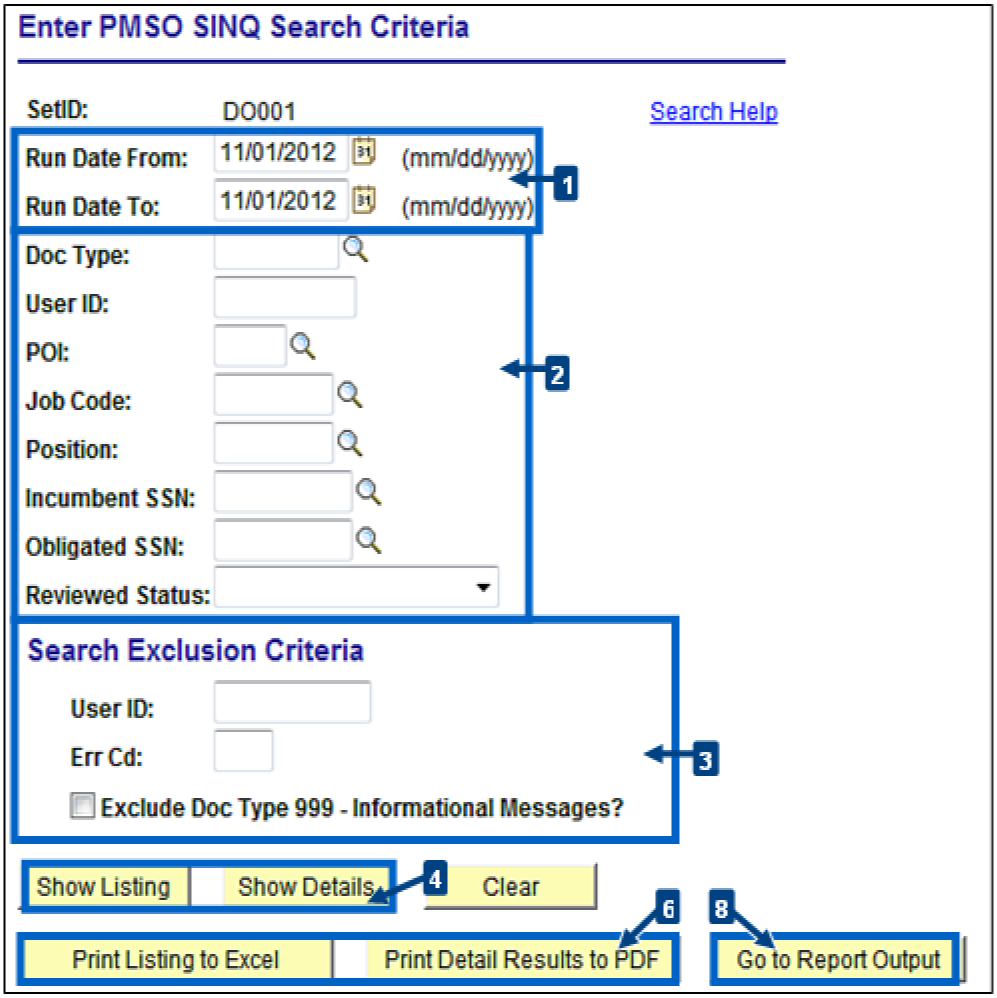
PMSO SINQ Search

The PMSO SINQ Search identifies actions that failed validation in the Position Management System (PMSO) to pass through Personnel Edit Subsystem validation.

To run a PINE SINQ Search:

Menu tab>Organizational Development menu>Position Management link>PMSO SINQ Search link>Enter PMSO SINQ Search Criteria page

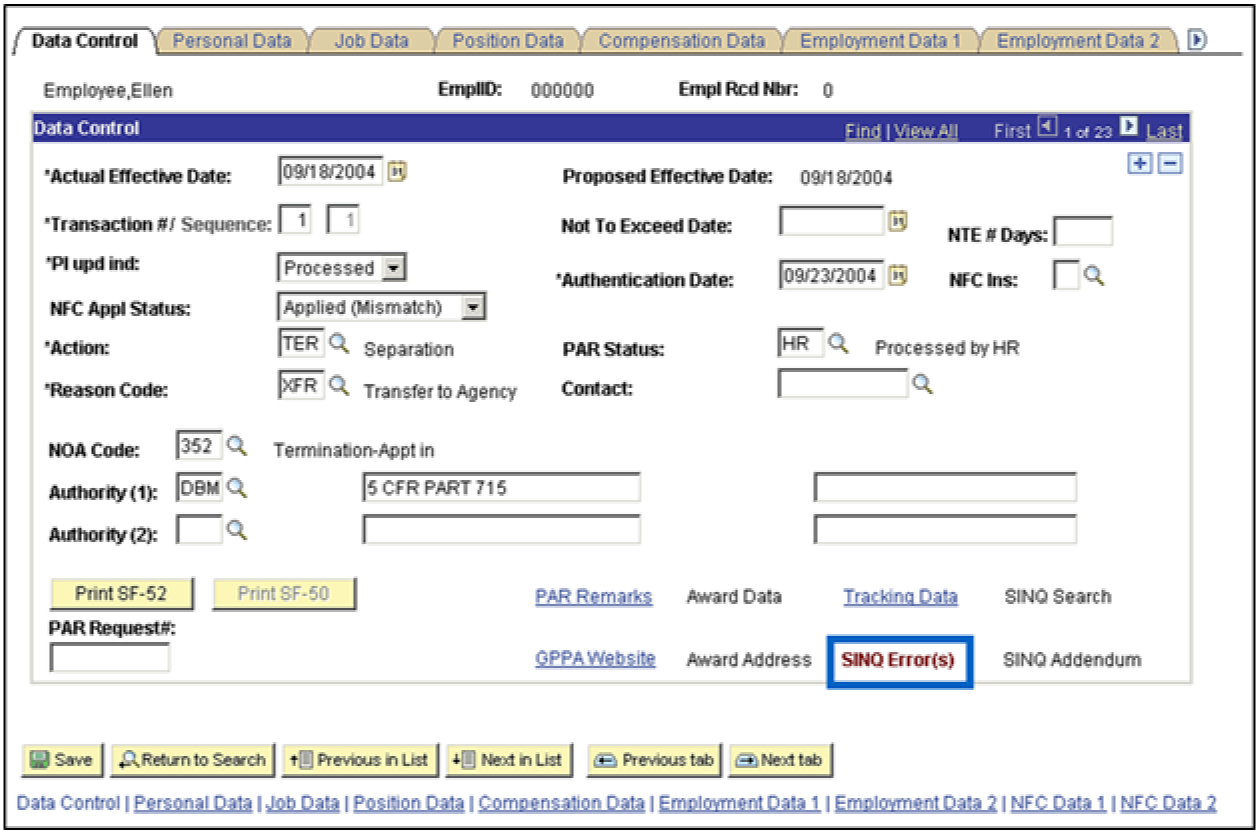
1. Specify the **Run Date From** and **To** dates.
2. (Optional): Enter the relevant search criteria (i.e., **Document Type**, **User ID**, **POI**, **Job Code**, **Position**, **Incumbent/Obligated Social Security Number**, and/or **Reviewed Status**).
3. (Optional): Enter **Search Exclusion Criteria** (i.e., **User ID**, **Error Code**, or **Doc Type 999 - Informational Messages**).
4. Select the **Show Listing** or **Show Details** buttons. (This will take you to a listing of SINQ messages matching your search criteria.)
5. (To print your results): On the listing results page, select the **Return to Search** button.
6. (To print your results): Select the **Print Listing to Excel** or **Print Detail Results to PDF**.
7. (To print your results): In the confirmation message, select the **OK** button.
8. (To print your results): Select the **Go to Report Output** button. (This will take you to the Report Output tab where you may retrieve your printed listing.)



Chapter 12 Figure 178: PMSO SINQ Search Form

SINQ Links

In addition to search functionality, each employee's record in HR Connect has a link, **SINQ Error(s)**, at the bottom of the **Data Control** tab. This link is inactive when no SINQ error exists. When a SINQ error does exist, the link will activate and turn red. Select the **SINQ Error(s)** link to view a detailed listing of SINQ errors for this record.



Chapter 12 Figure 179: SINQ Error Link

12.4 Reconciliation

Overview

SINQ and inbound interface reports can be used to identify potential inconsistencies between records in HR Connect and/or NFC. When an inconsistency is identified, corrections must be made within HR Connect and then transmitted to NFC for application. A correction should never be directly applied to NFC.

The following information should be reconciled: **Job Code Data**, **Position Data**, and **PAR Data**.

Job Code Data Reconciliation

After identifying a SINQ error resulting from a Job Code discrepancy, determine where the data needs to be corrected (i.e., NFC or HR Connect). This determination will influence the steps necessary to correct the SINQ error.

To reconcile Job Code Data:

Menu tab>Organizational Development menu>Position Management link>Define Position Data USF link>Job Codes link>Job Code USF page

1. Enter the **Job Code** and/or relevant search criteria.
2. Select the **Search** button.
3. (If the search returns multiple results): In the search results, select the appropriate **Job Code**.
4. Make any necessary corrections to the **Job Code Profile**, **Default Compensation**, and/or **Non-Base Compensation** tabs.
5. Select the **Job Code Profile** tab.
6. On the Job Code Profile tab:
7. (If the job code does not exist in NFC): change the **NFC Update Indicator** field to **Ready** and ensure that the **NFC Function Code** is set to **Add**.
8. (If the job code data in NFC is incorrect): change the **NFC Update Indicator** field to **Ready**.
9. (If the job code data in HR Connect is incorrect): leave the **NFC Update Indicator** field set to **Processed**.
10. Select the **Save** button. (This will save your work and refresh the **Job Code Profile** tab.)

Position Data Reconciliation

After identifying a SINQ error resulting from a Position Data discrepancy, determine where the data needs to be corrected (i.e., NFC or HR Connect). This determination will influence the steps necessary to correct the SINQ error.

To reconcile Position Data:

Menu tab>Organizational Development menu>Position Management link>Maintain Positions/Budgets link>Add/Update Position Info link>Add/Update Position Info page

1. Enter the appropriate **Position Number** and/or relevant search criteria**.**
2. Select the **Search** button.
3. (If the search returns multiple results): Select the appropriate **Position Number**.
4. Make any necessary corrections to the **Description**, **Specific Information**, and/or **Budget and Incumbents** tabs.
5. Select the **Description** tab.
6. On the **Description** tab:
   a. (If the job code does not exist in NFC): Change the **NFC Update Indicator** field to **Ready** and ensure that the **NFC Function Code** is set to **Add**.
   b. (If the job code data in NFC is incorrect): **Change the NFC Update Indicator** field to **Ready**.
   c. (If the job code data in HR Connect is incorrect): Leave the **NFC Update Indicator** field set to **Processed**.
7. Select the **Save** button. (This will save your work and refresh the **Description** tab.)

PAR Data Reconciliation

After identifying a SINQ error resulting from a Personnel Action Request (PAR) data discrepancy, determine where the data needs to be corrected (i.e., NFC or HR Connect). This determination will influence the steps necessary to correct the SINQ error.

To reconcile PAR Data:

Menu tab>Workforce Administration menu>Job Information link>HR Processing link>HR Processing page

1. Enter the relevant employee ID (**EmplID**) and/or search criteria.
2. Select the **Search** button.
3. (If the search returns multiple results): In the search results, select the appropriate **Job Code**.
4. Locate the relevant employee record.
5. On the Job Code Profile tab:
   a. (If the action did not apply in NFC): Ensure that the **PAR Status** is set to **HR** and change the **PI Upd Ind** field to **Ready**.

b. (If the PAR data in NFC is incorrect): Submit a Correction transaction to NFC. (Please consult the **PAR** chapter's **Correction** section for step by step instruction.)

c. (If the PAR data in HR Connect is incorrect): Leave the **NFC Update Indicator** field set to **Processed** and make any necessary corrections.

> **Note:** You cannot correct the **Effective Date** field through Correct History mode in HR Connect.
>
> If you need to correct the **Effective Date**, you must cancel the action and insert a new row with the correct **Effective Date**. (Please consult the PAR chapter's Cancellation section for step by step instruction.)

6. Select the **Save** button. (This will save your work and refresh the **Data Control** tab.)

CHAPTER 13: PERSONNEL ACTION REQUESTS (PARS)

13.1 INTRODUCTION TO PARS

OVERVIEW

Personnel Action Requests (PARs) include any personnel or payroll action taken to modify an employee's record in HR Connect. PARs may be position related (e.g., Change in Work Schedule, Change in Hours, etc.) or non-position related (e.g., Suspension, Personal Data Change, etc.) and may be initiated in the Front End (via ESS or MSS) or the Back End (via HRSS). Once initiated and properly routed, PAR actions will be made available through your individual or group worklist. Following processing by an HRSS user, changes to an employee's record may be transmitted to NFC via the Front End System Interface (**FESI**).

This section provides walkthroughs for both MSS and HRSS users. Primarily, this user guide presents PAR initiation from the perspective of an MSS user and processing from that of an HRSS user (Consult the **Employee Self Service** chapter for more ESS walkthroughs.).

The following subsections provide general information concerning PAR initiation and processing. In addition, walkthroughs are provided for initiating PAR actions via HRSS and accessing PAR actions through various worklists and the Back End Menu.

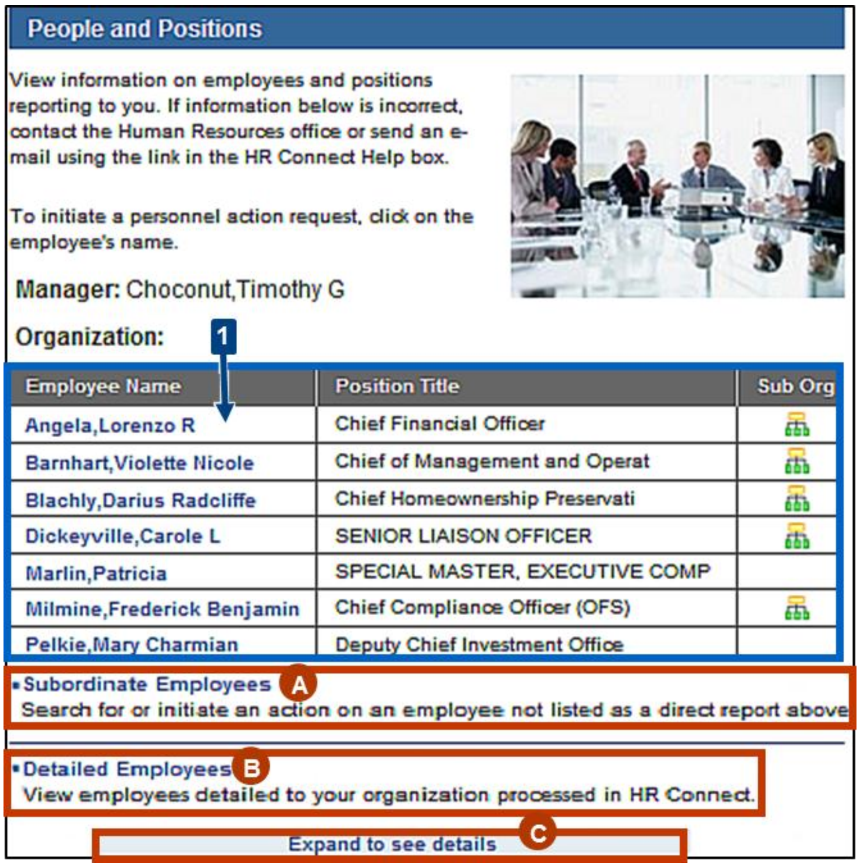
Initiating PARs via MSS

The process for initiating PARs via MSS involve many of the same pages, tabs, links, and fields. This section identifies and describes these sections in the context of PAR initiation (For more generic information about the **Manager** tab, consult the **Navigation** chapter).

To initiate a PAR via MSS:

Manager tab>People and Positions pagelet

1. In the list of direct reports, select the appropriate **Employee Name**. (Alternatively you may search for other **Subordinate** or **Detailed Employees** in your organization.)

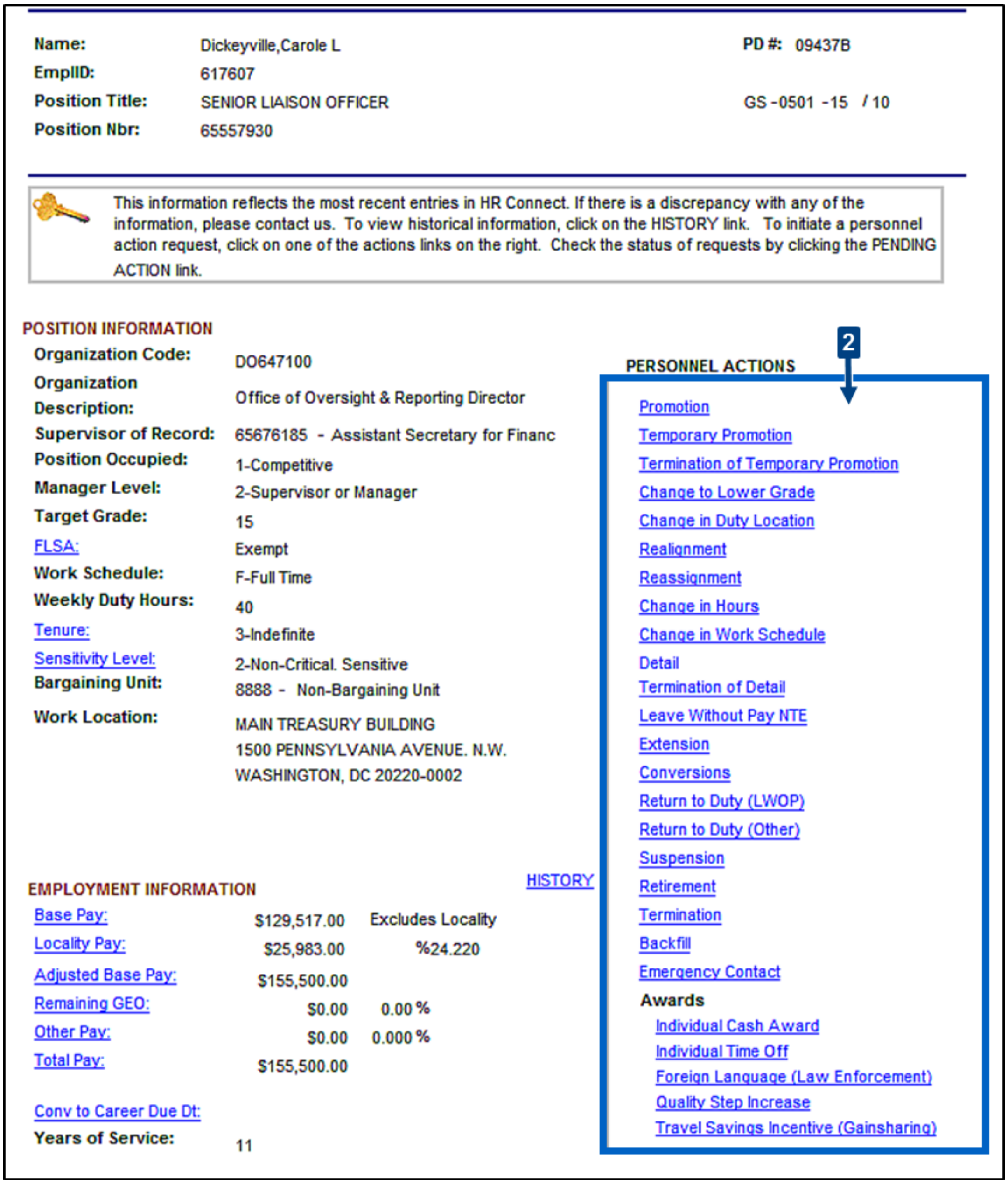


Chapter 13 Figure 180: MSS People & Positions Pagelet

A. **Subordinate Employees**- This link provides access to the **Subordinate Search- Select Employee** page. Allows access to subordinate employee's basic information and the ability to initiate PAR actions for that individual.
B. **Detailed Employees**– This link provides access to the **Detailed Employees** page. Allows access to a detailed employee's basic information and the ability to initiate PAR actions for that individual.
C. **Expand to see details**- This button provides access to the **People and Positions** page. Allows access to additional employee and position information.

2. Select the appropriate **Personnel Action** link.

Note: When processing actions that involve a change in the employee's position number (i.e., Promotion, Temporary Promotion, Change to a Lower Grade, Reassignment, and Detail) you will be directed to the Vacant Positions page before reaching the PAR form.



Chapter 13 Figure 181: Employee Data/Personnel Actions Page

3. (Only for PARs involving a change in position): From the **Personnel Actions- Vacant Positions** page, select the desired **Position #** link.

Personnel Actions - Vacant Positions

This page allows you to view your current approved vacancies. Click on the Position # below to perform an action on a vacant position. To see the full text of major duties and responsibilities, click on "View PD". If there is no vacant position that meets your needs, click on the link at the bottom of the page to search the PD library for the appropriate position description.

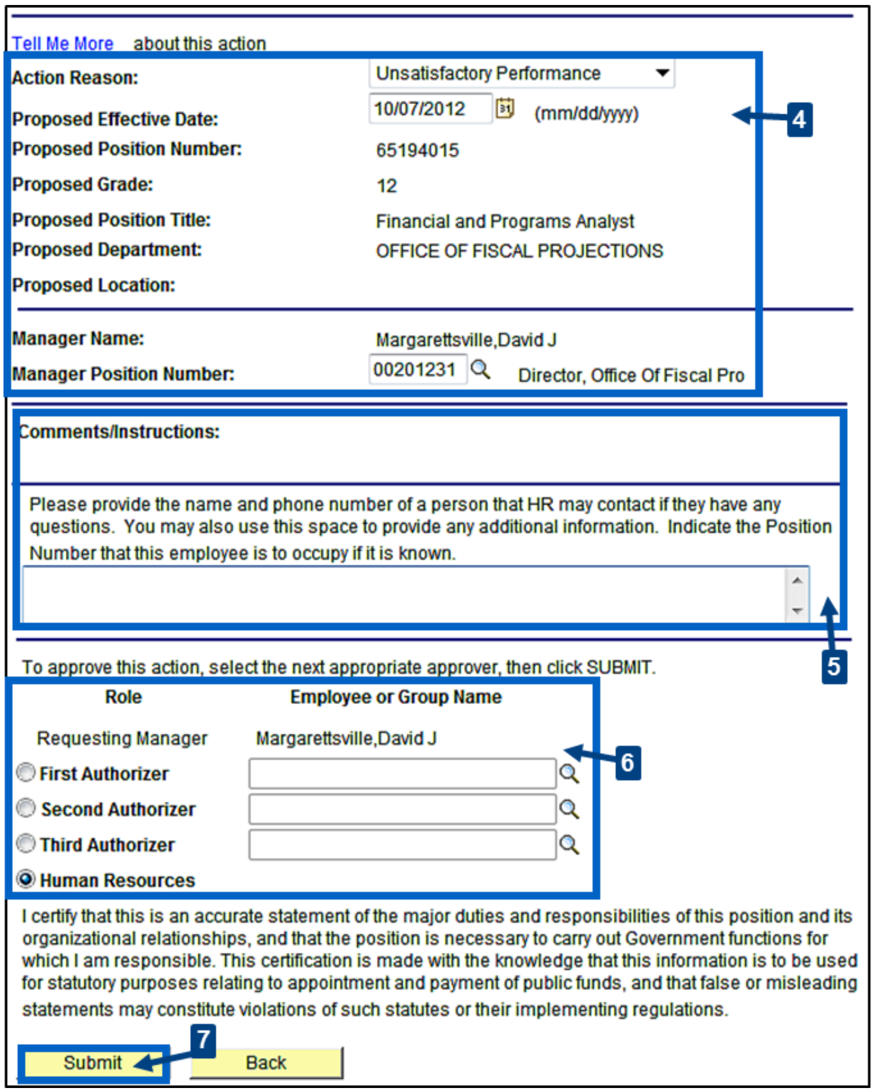
If you are processing a promotion to a career ladder position, click here

View All First 1-10 of 247 Last

Position Description #	Position #	Pay Plan/Series/Grade	Position Title	Major Duties
011137	65355818 3	GS-0301-09	Media Coordinator	MEDIA COORDINATOR GS-0301-09 PD# 011137 CAREER LADDER: GS-0301-07: 08284B I. INTRODU
011137	65382115	GS-0301-09	Media Coordinator	MEDIA COORDINATOR GS-0301-09 PD# 011137 CAREER LADDER: GS-0301-07: 08284B I. INTRODU
011281	65447161	GS-0301-11	Media Coordinator	Media Coordinator GS-301-11 I. INTRODUCTION The purpose of this position is to serve as a Med

Chapter 13 Figure 182: Personnel Actions- Vacant Positions Page

4. From the **PAR** page, enter the required information. (Consult the relevant PAR chapter section for more information.)
5. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
6. Enter or lookup the appropriate **Authorizer**.
7. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 183: PAR Page

Authorizing PARs via MSS

If an action requires MSS authorization prior to HRSS processing, the initiator may route the action to another MSS user. When routed for MSS authorization, actions will appear in that Manager's individual **Worklist** available on the **Manager** tab. The MSS authorizer may choose to approve the action and route it for further authorization/processing or disapprove the action and delete it.

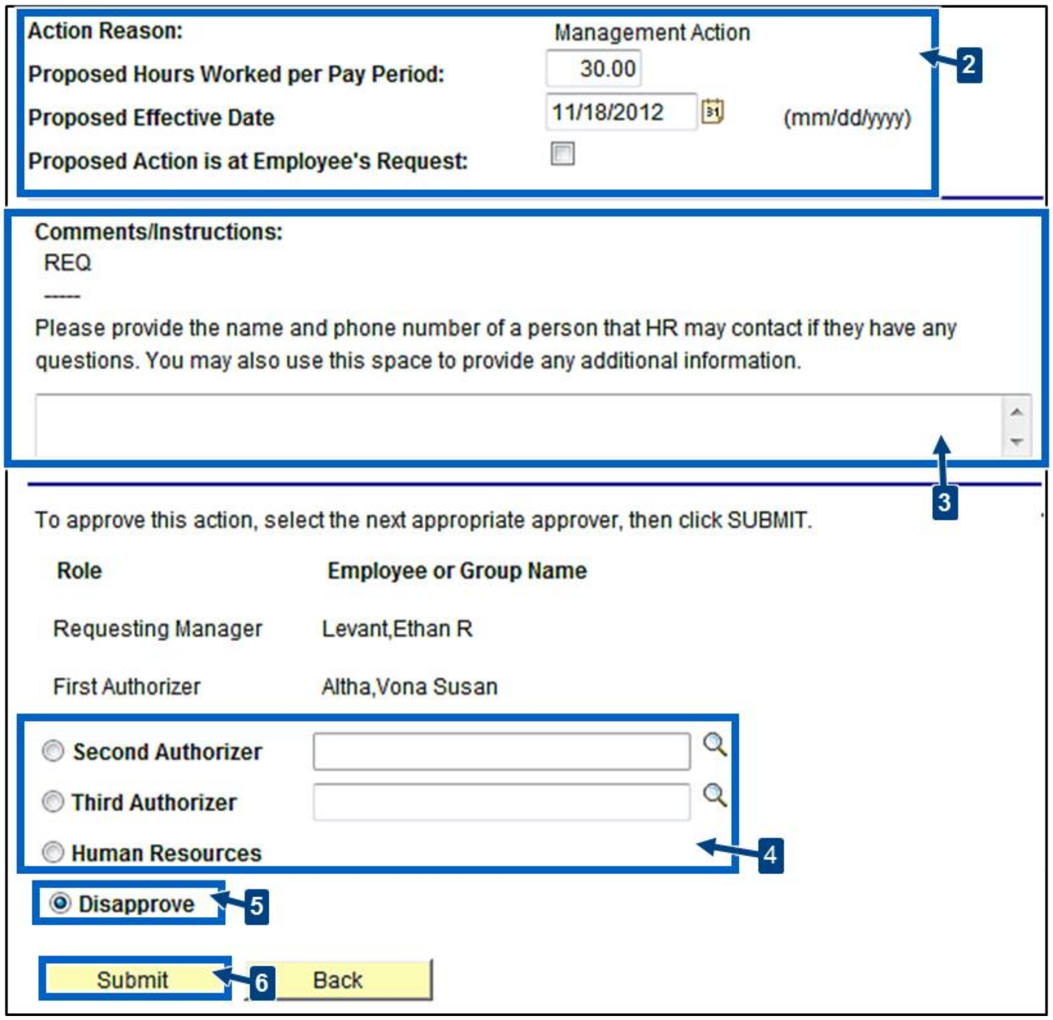
To approve or disprove a PAR via MSS:

Manager tab>Worklist pagelet

1. Select the desired **Personnel Action** link.

Chapter 13 Figure 184: Manager Worklist Pagelet

2. On the **PAR** page, review the information provided and make any changes as necessary.
3. (To **Disapprove**): Enter your reason for disapproval in the **Comments** field.
4. (To **Approve**): Enter or lookup the next MSS **Authorizer** (or select **Human Resources** to route the action for processing).
5. (To **Disapprove**): Select the **Disapprove** radio button. (Upon submission, this will delete the action and send an e-mail to the initiator.)
6. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 185: Authorizing a PAR Action Example

HRSS Initiating a PAR

Menu tab>Workforce Administration menu>Job Information link>HR1 Authorization link>HR1 Authorization page

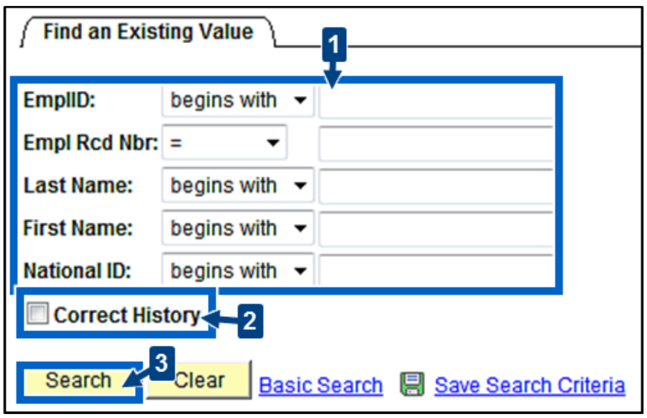
Primarily, this User Guide presents PAR initiation from the perspective of an MSS user. In addition to Front End MSS initiation, HR Connect includes functionality for HRSS users to initiate PAR actions through the Back End Menu. This process involves inserting a new row into the employee's record and manually entering PAR data.

To initiate a PAR action via HRSS:

1. Enter the employee's ID (**EmplID**) and any relevant search criteria.
2. Ensure that the **Correct History** box is empty.

> **Note:** The **Correct History** checkbox allows you to overwrite existing data. This checkbox should only be selected when correcting an employee's record. Consult the PAR chapter's Correction section for more information.

3. Select the **Search** button.



Chapter 13 Figure 186: HR1 Authorization Page

4. On the **Data Control** tab, select the add a row (**+**) button.
5. In the new row, enter relevant PAR data. (Consult the PAR section associated with the desired action for more information.)
6. Select the **Data Control** tab.
7. On the **Data Control** tab, enter processing data. (Consult the **HRSS Processing a PAR** subsection for more information.)
8. Select the **Save** button.
9. Enter or lookup the appropriate **HR Authorizer** (HR2, HR3, or HR Processing). (Consult the **HRSS Routing a PAR** subsection for more information.)
10. Select the **OK** button. (This will take you to the **Data Control** tab).

Working an Existing PAR In HRSS

After actions are initiated via MSS or HRSS, as part of the workflow they are then routed to individuals in HR for authorization and processing, before the approved action is sent to NFC.

Each organization has set up its own rules for routing PAR actions through the workflow, based on **NOA** codes, **POI** (Personnel Office Identifier), and **Department**.

HRSS users can access PARs routed for processing via the **Back End Menu** or via their individual, group, or web worklist.

Individual Worklist

Actions will appear in your individual worklist only if they are routed directly to your account.

To access a PAR through your individual worklist:

HR tab>Worklist pagelet

1. Select the desired **Personnel Action** link. (This will take you to the **Data Control** tab for that action.)

> **Note:** Selecting the **Expand to see details** button will take you to a more detailed version of your individual worklist.

> **Caution!** You will be taken to the **Most Recent** action on the employee's record, which may not be the action you intend to work. Verify that you are in the correct row of the employee's record before working the action.

Chapter 13 Figure 187: Individual Worklist

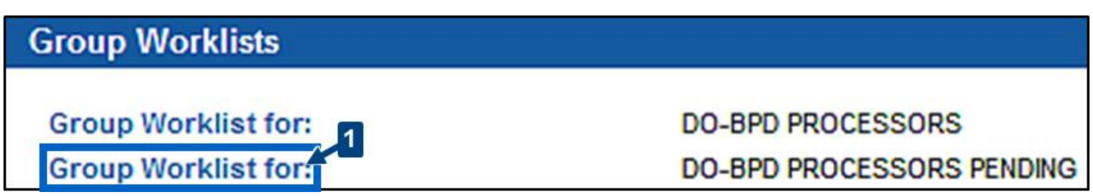
Group Worklist

Actions will be found in your **Group Worklist** only if they are routed to a group of which you are a member.

To access a PAR through your **Group Worklist**:

Proxy/Group tab>Group Worklists pagelet>Group Worklist for link>Worklist for Group page

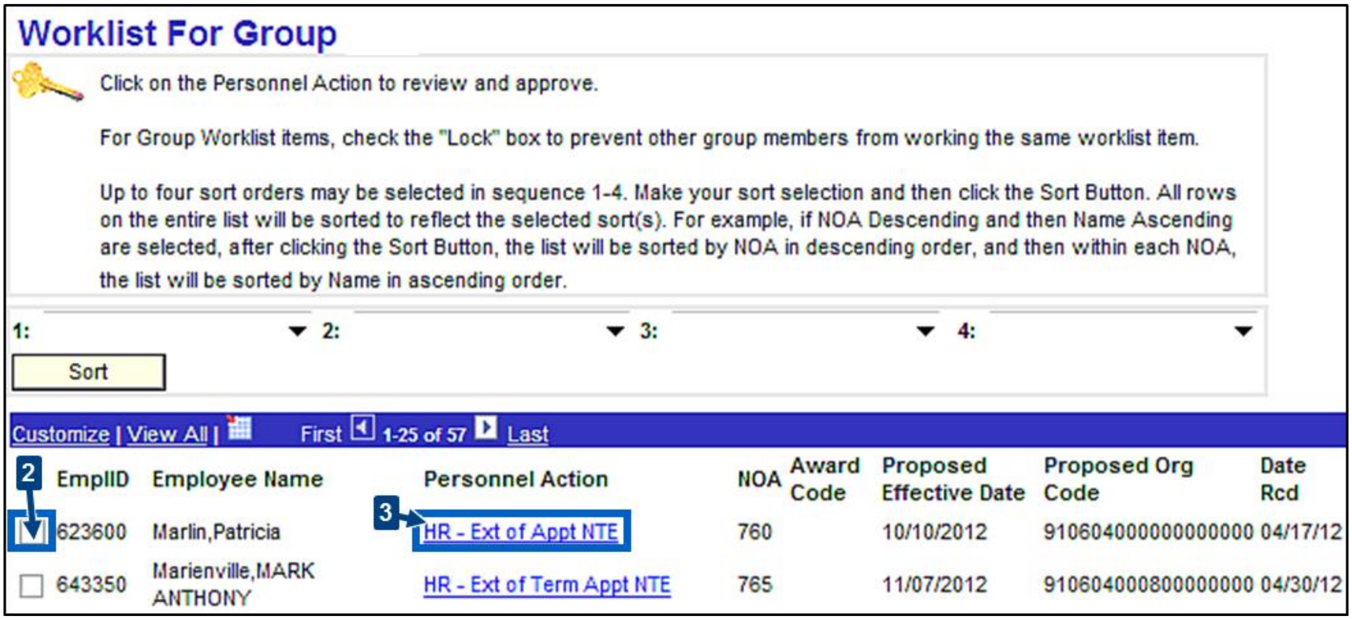
1. Select the desired **Group Worklist for** link.



Chapter 13 Figure 188: Group Worklists Pagelet

2. (Optional): On the **Worklist For Group** page, claim the action by selecting the **checkbox** in line with the desired PAR. (This will prevent other group members from working the claimed action.)
3. Select the desired **Personnel Action** link. (This will take you to the **Data Control** tab for that action.)

Caution! You will be taken to the **Most Recent** action on the employee's record, which may not be the action you intend to work. Verify that you are in the correct row of the employee's record before working the action.



Chapter 13 Figure 189: Worklist For Group Page

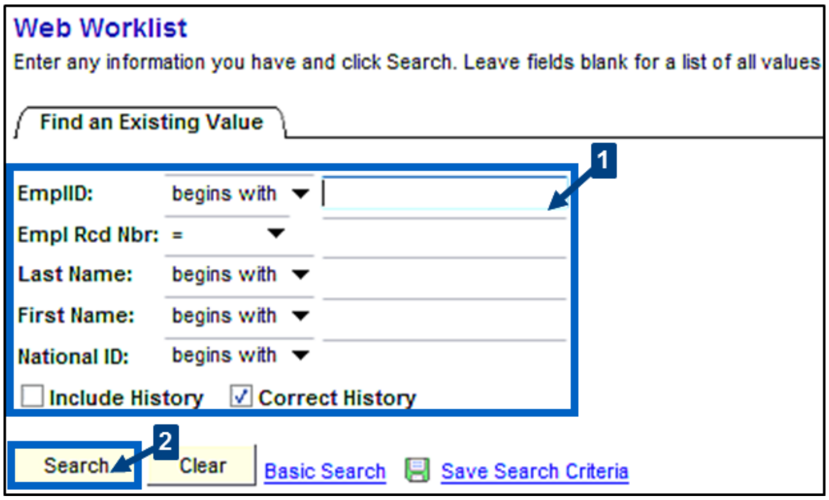
WEB WORKLIST

The **Web Worklist** is a safety net where routed actions are placed if there is no rule in place to identify the appropriate worklist where the action should be automatically routed. In practice, the **Web Worklist** is an intermediate step, wherein an HRSS user must manually reroute the action to the appropriate group or individual worklist.

To reroute a **Web Worklist** action:

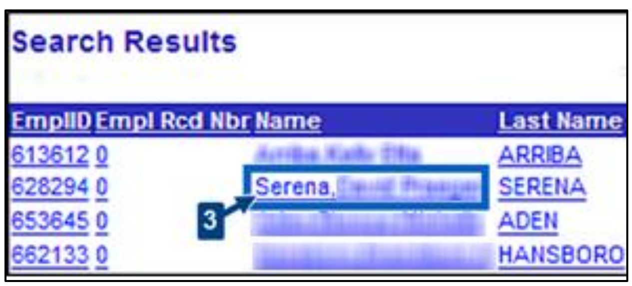
Menu tab>Workforce Administration link>Job Information link>Web Worklist page

1. Enter the relevant search criteria.
2. Select the **Search** button.



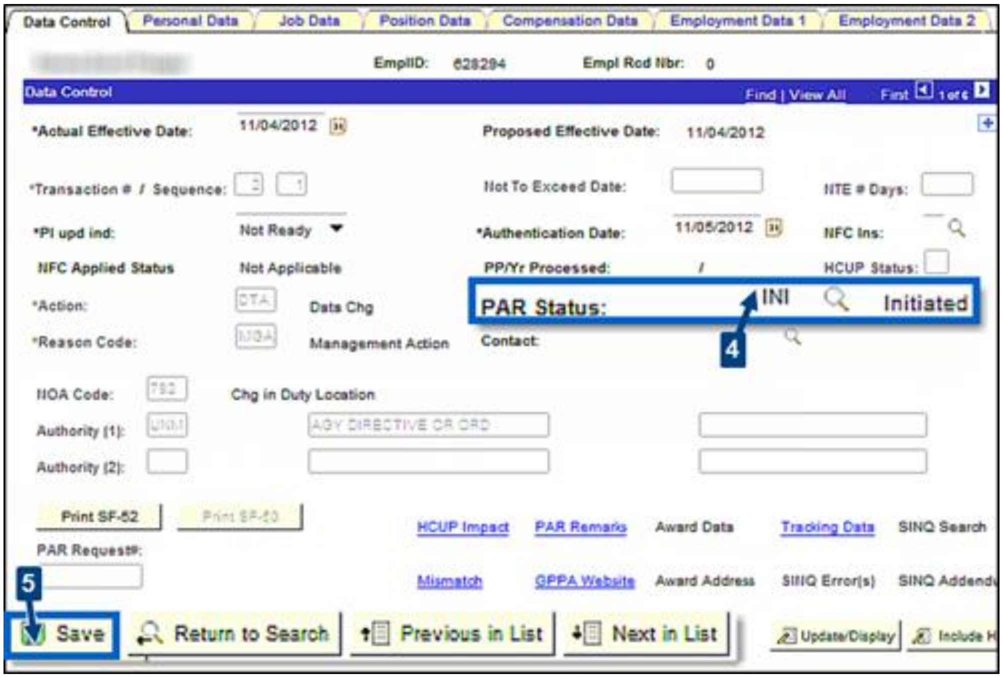
Chapter 13 Figure 190: Web Worklist Search Page

3. In the **Search Results**, select the desired employee **Name**.



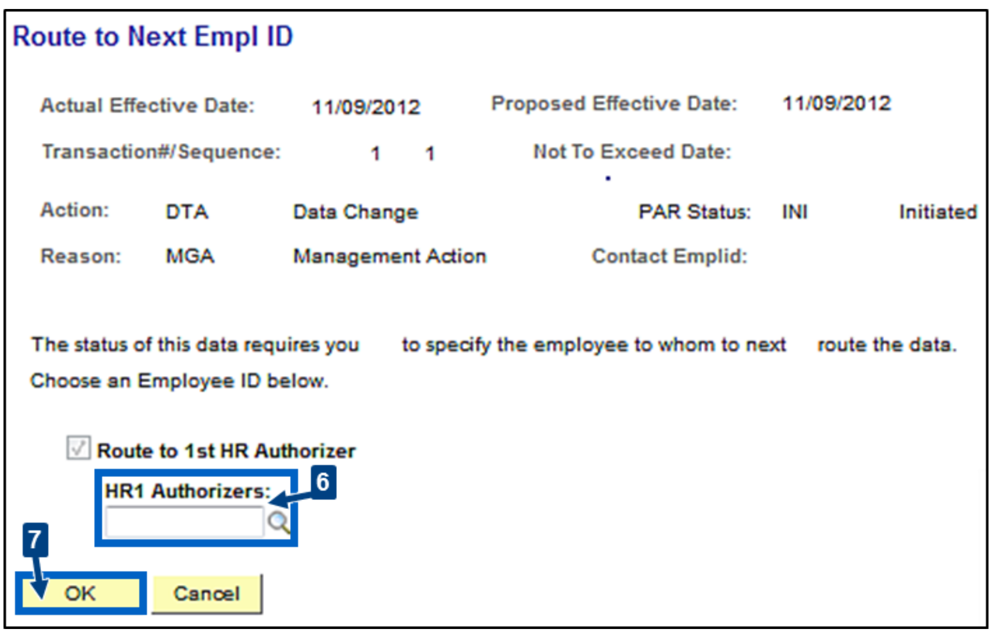
Chapter 13 Figure 191: Web Worklist Search Page Search Results

4. On the **Data Control** tab, change the **PAR Status** from **WEB** to **INI**.
5. Select the **Save** button.



Chapter 13 Figure 192: Data Control Tab For Web Worklist

6. On the **Route to Next Empl ID** page, enter or select the desired **HR1 Authorizer**.
7. Select the **OK** button. (This will take you to the **Data Control** tab and route the action to the appropriate worklist.)



Chapter 13 Figure 193: Route to Next Empl ID

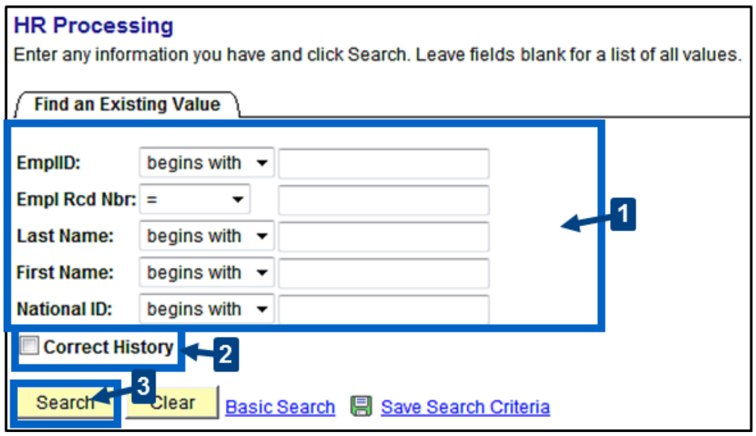
Back End PAR Access

If an action is not routed to your account or a group of which you are a member, HR Connect includes functionality to search for an employee's record using the Back End Menu. This tool may also be useful for accessing an action that you have previously worked, but is no longer present in your worklists.

To access an employee's record via the Back End:

Menu tab>Workforce Administration menu>Job Information link>HR Processing link>HR Processing page

1. Enter the employee's ID (**EmplID**) and/or any relevant search criteria.
2. (Optional): Select the **Correct History** checkbox. (When filled, this unlocks greyed out fields and allows you to overwrite existing data.)
3. Select the **Search** button.



Chapter 13 Figure 194: HR Processing Page

4. Select the **Search** button. (This will take you to the **Data Control** tab of the employee's record.)

Cancellations

Overview

HR Connect includes the functionality to cancel actions. The method for implementing a cancellation varies depending on the action's timeframe status (Current or Historic).

To perform a Cancellation for a Current action or Historic action:

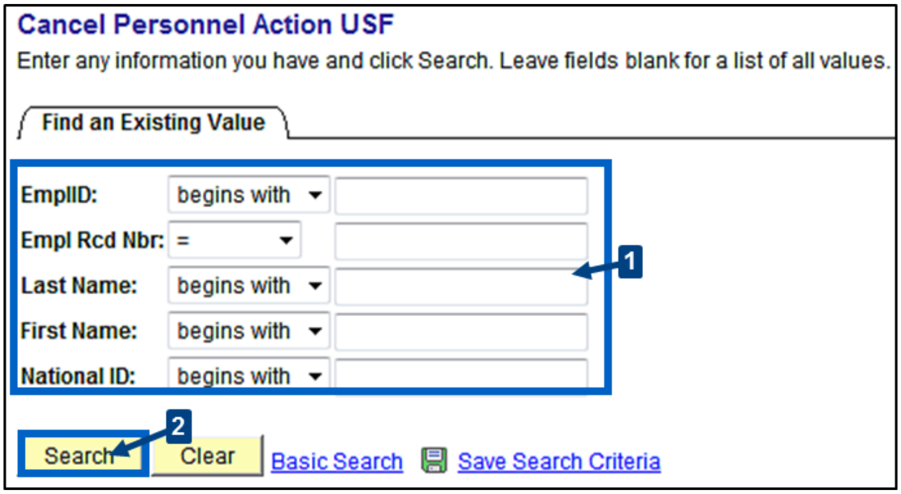
Current Actions

Menu tab>Workforce Administration menu>Job Information link>Cancellation link>Cancel Personnel Action USF page

An action is considered current if it has the most recent effective date of all actions in the employee's record. If multiple actions have the same effective date, their ordering will be determined by highest sequence number.

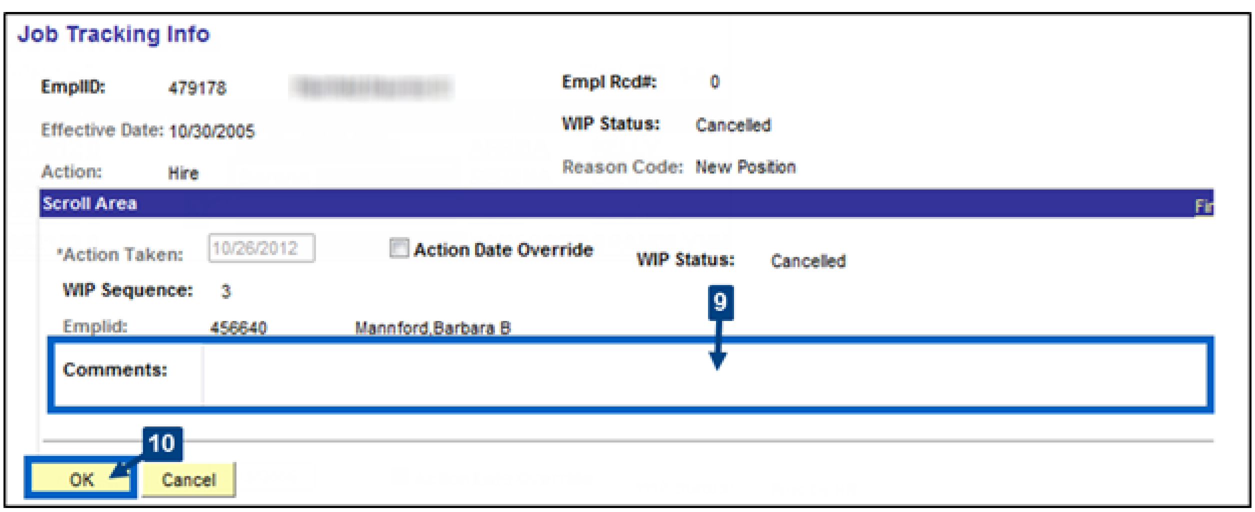
To correct a current action:

1. On the **Cancel Personnel Action USF** page, enter the relevant search criteria.
2. Select the **Search** button.



Chapter 13 Figure 195: COR Processing Search Form

3. On the **Data Control** tab, verify the date the action is to be cancelled in the **Actual Effective Date** field.
4. In the **PAR Status** field, enter or lookup **CAN**.
5. In the **NOA Code** field, verify that the NOA Code is **001** (Cancellation).
6. Verify the legal authority in the **Authority (1)** field.
7. Enter or select an **Authentication Date**.
8. Select the **Tracking Data** link.
9. On the **Job Tracking Info** page, enter the reason for cancellation in the **Comment** field.
10. Select the **OK** button.



Chapter 13 Figure 196: Job Tracking Info Page – Cancellation

11. Select the **Save** button. (This will take you to the **Data Control** tab).

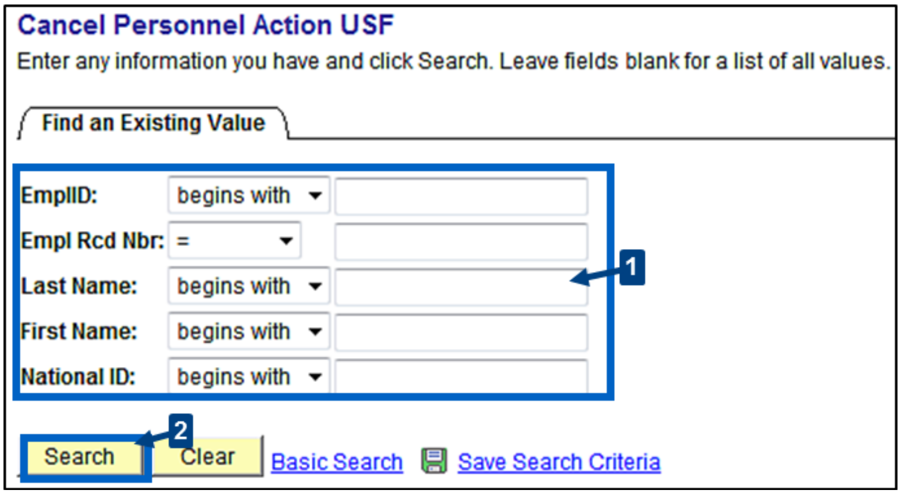
Historic Actions

Menu tab>Workforce Administration menu>Job Information link>Cancellation link>Cancel Personnel Action USF page

A historic row is any row that does not have the most recent effective date, but has been entered after HR Connect was implemented at your organization. The basic steps are the same for cancelling a current row, with the caveat that changes to a historic row may influence any row following it, including the current row.

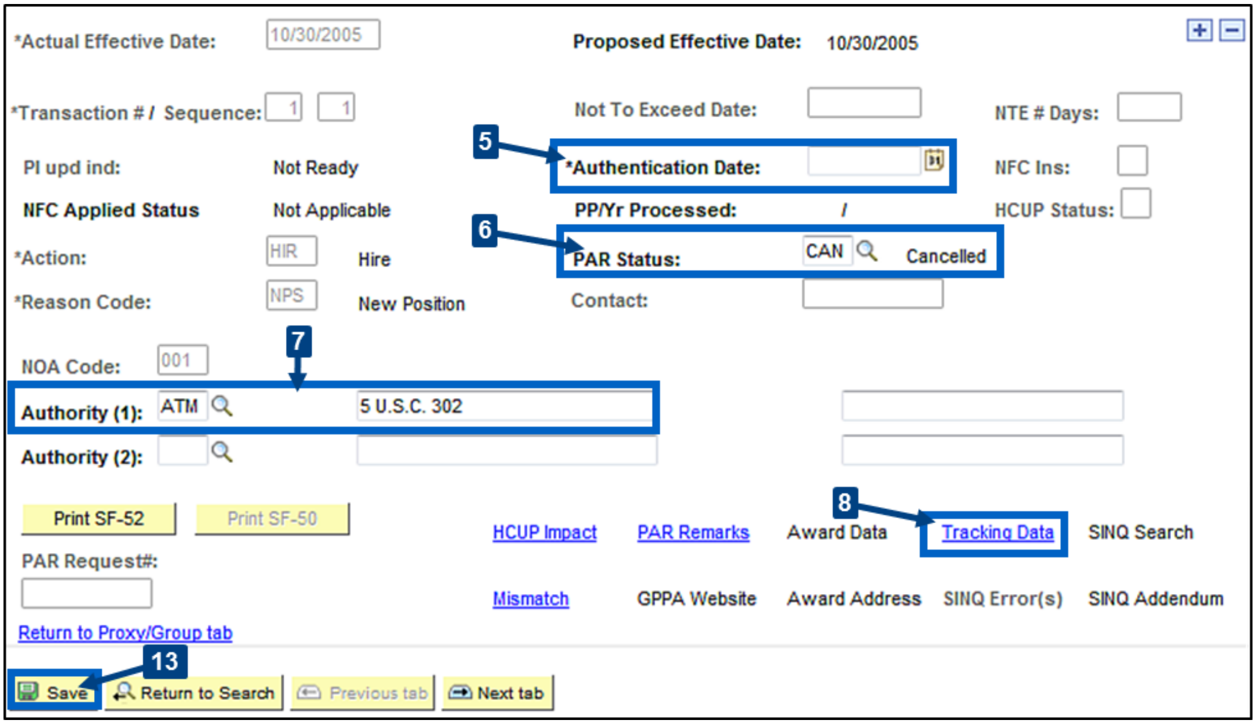
To cancel an Historic Action:

1. On the **Cancel Personnel Action USF** page, enter the relevant search criteria.
2. Select the **Search** button.



Chapter 13 Figure 197: COR Processing Search Form

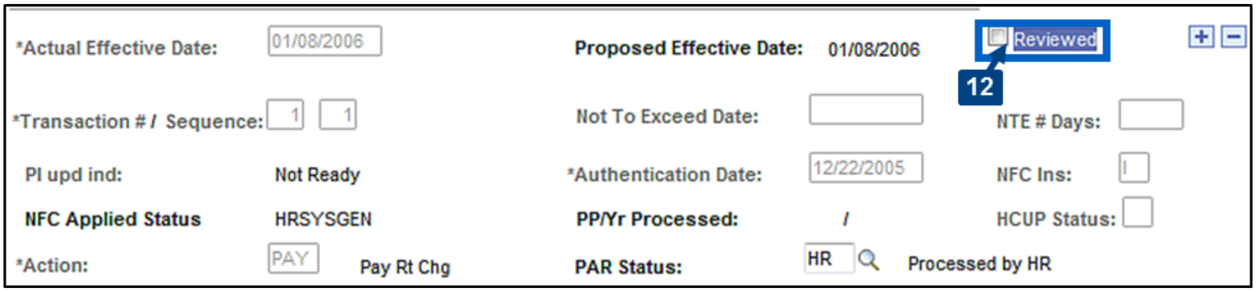
3. On the **Data Control** tab, select the **View All** link.
4. Locate the action to be cancelled by scrolling through the rows of the employee's record.
5. In the appropriate row, enter the **Authentication Date**.
6. In the **PAR Status** field, enter or select **CAN**.
7. Verify the legal authority in the **Authority (1)** field.
8. Select the **Tracking Data** link.



Chapter 13 Figure 198: Data Control Tab – Cancellation Example

9. On the **Job Tracking Info** page, enter the reason for cancellation in the **Comment** field.
10. Select the **OK** button.
11. On the **Data Control** tab, review all rows above the cancelled row to assess the cancellations impact.
12. Once a row is reviewed, select the **Reviewed** checkbox.

Note: If a row is adversely impacted by the cancellation, make corrections to that row using the procedure outlined in the Corrections section of the User Guide.



Chapter 13 Figure 199: Reviewing Impacted Rows

13. Select the **Save** button.
14. On the first confirmation page, select the **Yes** button.
15. On the second confirmation page, select the **Yes** button. (This will take you back to the **Data Control** tab.)

CORRECTIONS

OVERVIEW

HR Connect includes functionality to perform corrections to actions in an employee's record. The method for implementing a correction varies depending on the action's timeframe status (Current, Historic, or Pre-dating HR Connect).

To perform a Correction for a Current action, Historic action, or Actions predating HR Connect implementation:

CURRENT ACTIONS

Menu tab>Workforce Administration menu>Job Information link>COR Processing link>COR Processing page

An action is considered current (for correction purposes) if it has the most recent effective date of all actions in the employee's record (other than exception actions like awards, details not released to NFC, and change in data element). If multiple actions have the same effective date, their ordering will be determined by highest sequence number.

T correct a Current Action:

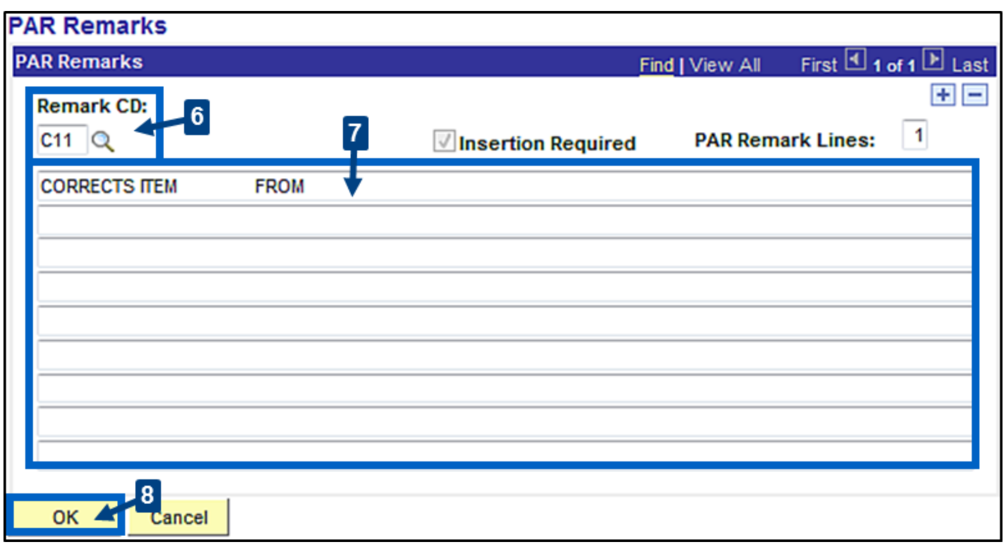
1. On the **COR Processing** page, enter the relevant search criteria.
2. Select the **Search** button.

Chapter 13 Figure 200: COR Processing Search Form

3. On the **Data Control** tab, select the add a row (**+**) button.
4. Enter the **Authentication Date**.
5. Select the **PAR Remarks** link.
6. In the **Remark CD** field on the **PAR Remarks** page, enter or select **C11**.
7. In the remark row, fill in the blanks by entering the **Item** to be corrected and record the original data in the **From** field.

Note: For additional remarks, select the add row (**+**) button & repeat **Steps 6-7** as necessary. To remove a remark select the remove row (**-**) button.

8. Select the **OK** button.



Chapter 13 Figure 201: PAR Remarks – Correction

9. Make all necessary corrections to the employee's record.
10. On the **Data Control** tab, enter or lookup the appropriate **PAR Status**.
11. (If PAR Status = COR): In the **PI upd ind** dropdown menu, select **Ready**.
12. Select the **Save** button. (This will save your changes and refresh the tab.)

Historic Actions

Menu tab>Workforce Administration menu>Job Information link>COR Processing link>COR Processing page

A historic row is any row that does not have the most recent effective date (other than exceptions actions), but has been entered after HR Connect was implemented at your organization. The basic steps are the same for correcting a current row, with the caveat that changes to a historic row may influence any row following it, including the current row and that the **PI Upd Ind** may not be set to **Ready**.

1. On the **COR Processing** page, enter the relevant search criteria.
2. Select the **Search** button.
3. On the **Data Control** tab, select the **view all** link.
4. Review all rows with a more recent effective date than the historic row and assess the potential impact your correction will have.
5. Select the add a row (**+**) button in the historic row.
6. Enter the **Authentication Date**.
7. Select the **PAR Remarks** link in the historic row.
8. In the **Remark CD** field on the **PAR Remarks** page, enter or select **C11**.
9. In the remark row, fill in the blanks by entering the **Item** to be corrected and record the original data in the **From** field.

> **Note:** For additional remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

10. Select the **OK** button.
11. Make all necessary corrections to that row.
12. On the **Data Control** tab, enter or lookup the appropriate **PAR Status**.
13. (If PAR Status = COR): In the **PI upd ind** dropdown menu, select **Ready**.
14. Repeat **Steps 5-13** for each affected row.
15. Select the **Save** button. (This will save your changes and refresh the tab.)

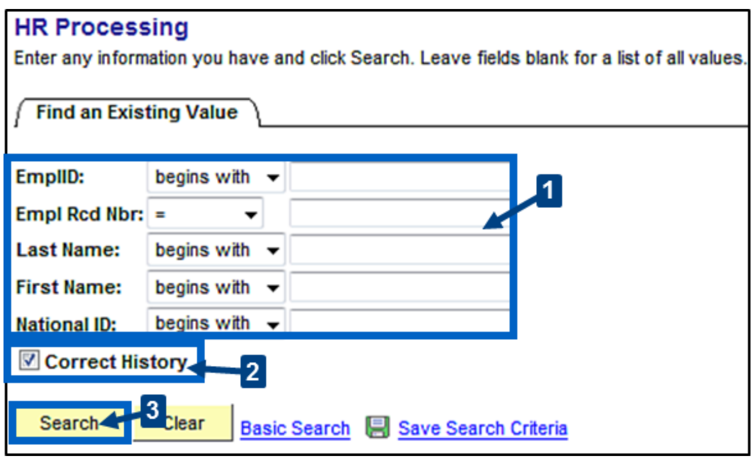
Actions Predating HR Connect

Menu tab>Workforce Administration menu>Job Information link>HR Processing link>HR Processing page

Any action that is not the current action will not be communicated to the NFC (i.e., the Payroll Interface update indicator will be left as Not Ready).

To make a correction to an Action Predating HR Connect:

1. On the **HR Processing** page, enter the relevant search criteria.
2. Select the **Correct History** checkbox.
3. Select the **Search** button.



Chapter 13 Figure 202: HR Processing Search Form

4. On the **Data Control** tab, select the **view all** link.
5. Review all rows with a higher effective date than the historic row and assess the potential impact your correction will have.
6. Select the add a row (**+**) button in the historic row.
7. Enter the **Authentication Date**.
8. Select the **PAR Remarks** link in the historic row.
9. In the **Remark CD** field on the **PAR Remarks** page, enter **C11**.
10. In the remark row, fill in the blanks by entering the **Item** to be corrected and record the original data in the **From** field.

Note: For additional remarks, select the add row (**+**) button & repeat Steps 9-10 as necessary. To remove a remark select the remove row (**-**) button.

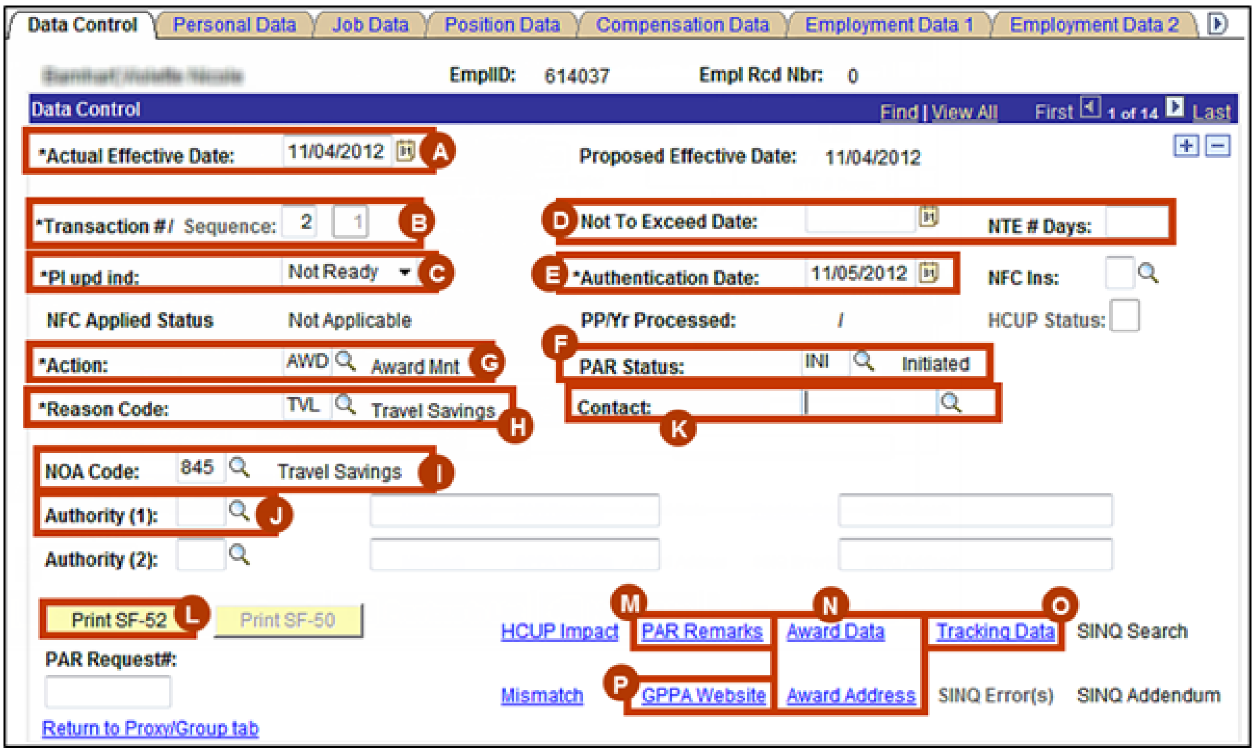
11. Select the **OK** button.
12. Make all necessary corrections to that row.
13. On the **Data Control** tab, enter or lookup the appropriate **PAR Status**.
14. (If PAR Status = COR): Verify that the **PI upd ind** dropdown menu has defaulted to **Not Ready**.
15. Repeat **Steps 6-14** for each affected row.
16. Select the **Save** button. (This will save your changes and refresh the tab.)

Common HRSS PAR Pages

In authorizing and processing PAR actions, many of these actions utilize some of the same pages, tabs, links, and fields. Those items will be identified and described in this section.

Data Control Tab

The **Data Control** tab provides the basic parameters for authorizing and processing a PAR action. It includes information that defines the duration of, and provides the justification for, and status of an action.



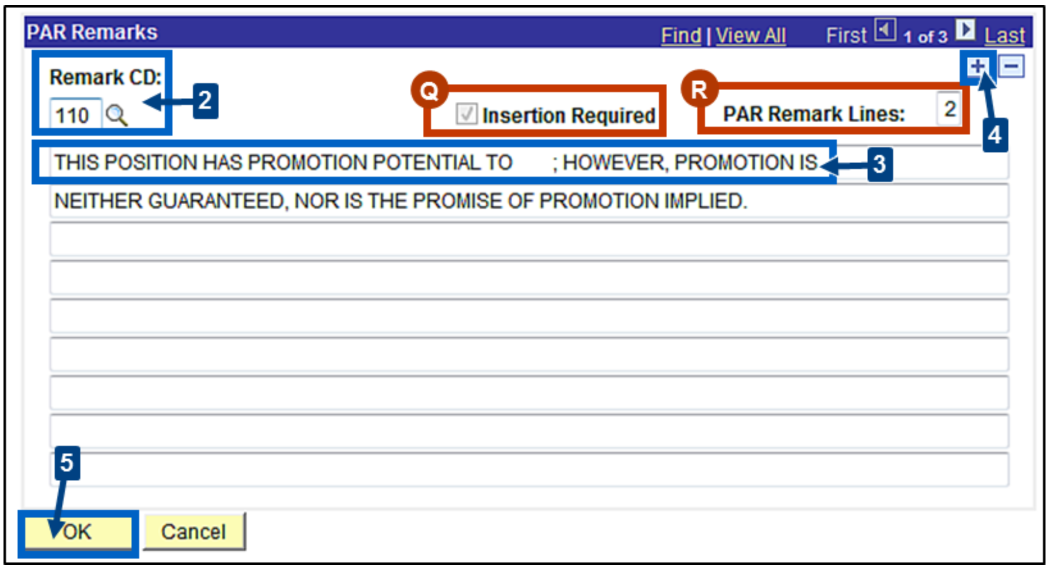
Chapter 13 Figure 203: Data Control Tab Elements Labeled

A. **Actual Effective Date**- Indicates the date when the action became or will become effective.
B. **Transaction #/Sequence**- When two actions share the same effective date, the sequence number determines which will be shown first. For example, the action with the most recent effective date and highest sequence number will be shown in the first row of an employee's record.

C. **Not To Exceed Date**- Indicates the date when a temporary action is scheduled to end. Alternatively, you may enter the number of days the action is to remain active in the **NTE # Days** field. This will automatically calculate and generate the Not To Exceed Date.
D. **Pl upd ind**- The Payroll Interface Update Indicator (**PI upd ind**) indicates the actions status for communicating with NFC. When set to **Not Ready** the action will not be transmitted. When set to **Ready**, the action is queued for submission to NFC. When the status is **Processed**, this indicates that the action was transmitted to NFC.
E. **Authentication Date**- This date is used for the sequencing of actions in NFC. The date entered here will appear in box 49 of the SF-50.
F. **PAR Status**- Indicates the actions authorization status INI = Initiated, HR1 = First Level Authorization, HR2 = Second Level Authorization, HR3 = Third Level Authorization, HR = Processed by HR). Additionally actions can be rejected (RJT), returned to the initiator (RET), corrected (COR), or cancelled (CAN).
G. **Action**- Indicates the action being taken as a 3 letter code (e.g., PRO = Promotion, REH = Rehire, TER = Separation, etc.).
H. **Reason Code**- Indicates the reason for the action (e.g., CMS = Competitive Selection, JRE = Job Reclassification, NCP = Normal Career Progression, etc.).
I. **NOA Code**- Nature of Action (NOA) Codes further explain the action taken (e.g., 702 = Promotion, 703 = Temporary Promotion, 740 = Position Change, etc.).
J. **Authority (1)**- Identifies the legal authority code under which the action is taken (i.e., the law, Executive Order, regulation, agency directive, etc.).
K. **Contact**- Identifies an employee who may be contacted for more information regarding the action.
L. **Print SF-52**- Selecting the **Print SF-52** button will generate an SF-52 report and take you to the **Report Output** page. Select the relevant **Request for Personnel Action** report link to review the employee's SF-52.
M. **PAR Remarks link**- Opens the **PAR Remarks** page (shown below) wherein you may generate pre-formatted text and enter information required for the **NOA Code** chosen. Comments entered here will appear on the employee's SF-50.
N. **Award Data & Award Address**- These links provide reward relevant information and are available only when processing an award action. For more information, consult the **Award** section in the **PAR** chapter of this User Guide.
O. **Tracking Data link**- Opens the **Job Tracking Info** page (shown below), wherein you may add or view comments about the current transaction. Any comments entered during the MSS request process will be stored here.
P. **GPPA Website**- This link will open the Office of Personnel Management's **Guide to Processing Personnel Actions** (GPPA).

To enter or modify a PAR Remark:

1. On the **Data Control** tab, select the **PAR Remarks** link.
2. Review or lookup the appropriate **Remark CD**. The Remark Code will automatically generate text.
3. Enter any necessary information in the remark rows. (The Remark CD chosen may require you to enter additional information.)
4. (Optional): Select the add row (**+**) button to enter additional remarks. (Repeat **Steps 2-3**).
5. Select the **OK** button. (This will return you to the **Data Control** tab.)

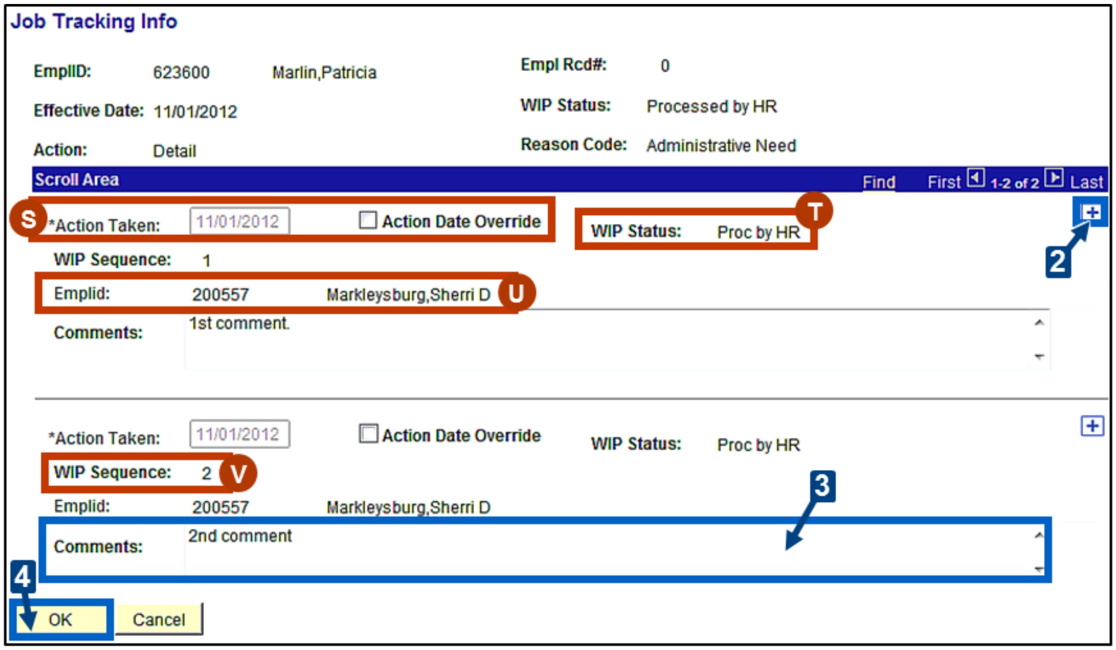


Chapter 13 Figure 204: PAR Remarks Page

Q. **Insertion Required**- Indicates whether or not the **Remark CD** requires any additional text to be entered in the automatically generated remark text.
R. **PAR Remark Lines**- Indicates the number of lines required for the chosen **Remark CD**. This count does not include any manually added content.

To add a new comment in **Job Tracking Info**:

1. On the **Data Control** tab, select the **Tracking Data** link.
2. Select the add row (**+**) button to enter a new comment.
3. Enter a note or instruction into the **Comment** field.
4. Select the **OK** button. (This will return you to the **Data Control** tab.)

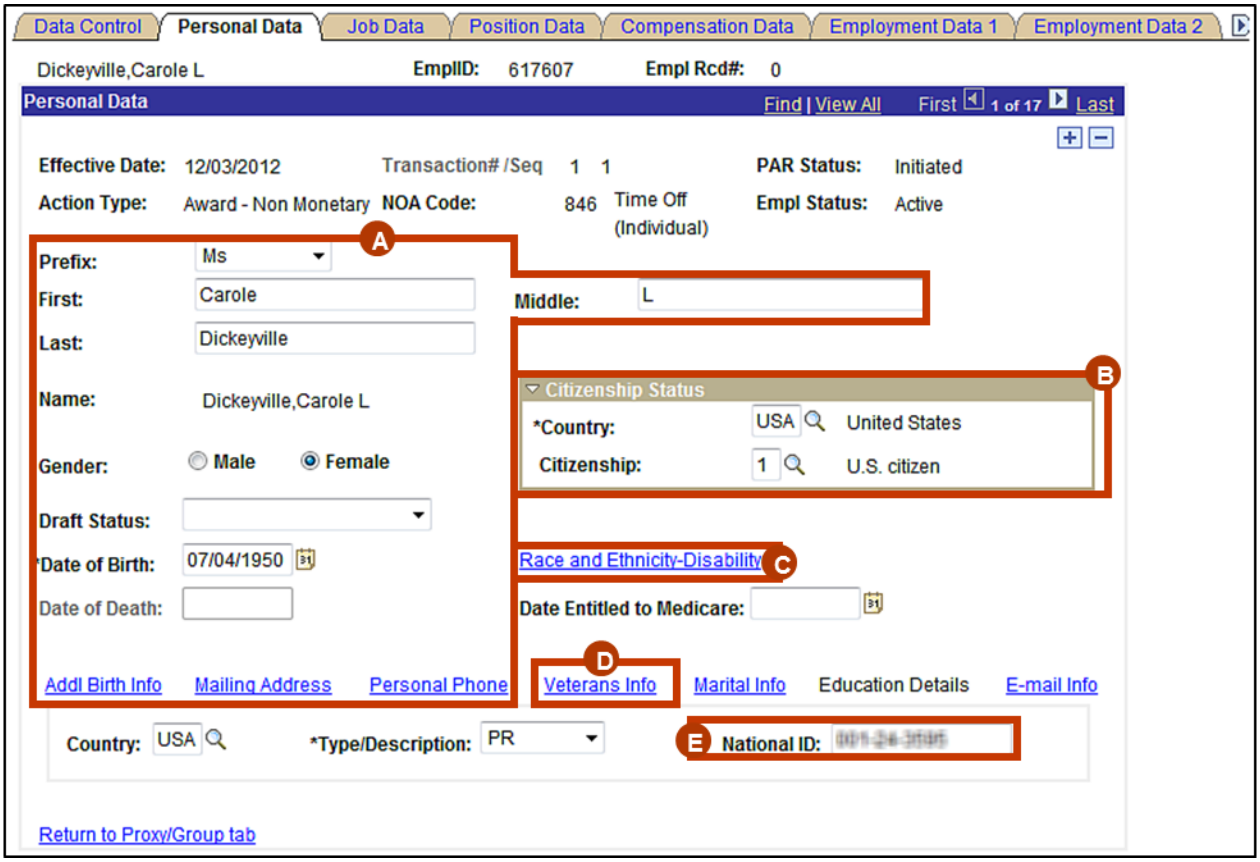


Chapter 13 Figure 205: Job Tracking Info Page

S. Action Taken- Indicates the date that the comment was entered. This date can be modified by selecting the **Action Date Override** checkbox.
T. WIP Status- The Work In Progress (WIP) Status is dependent on the action's PAR Status at the time the comment was entered.
U. Emplid- Identifies the employee who originally entered the comment.
V. WIP Sequence- Identifies the order of comments. The highest WIP Sequence number indicates the most recently entered comment.

PERSONAL DATA TAB

The **Personal Data** tab provides personal information specific to the employee to which the action pertains.

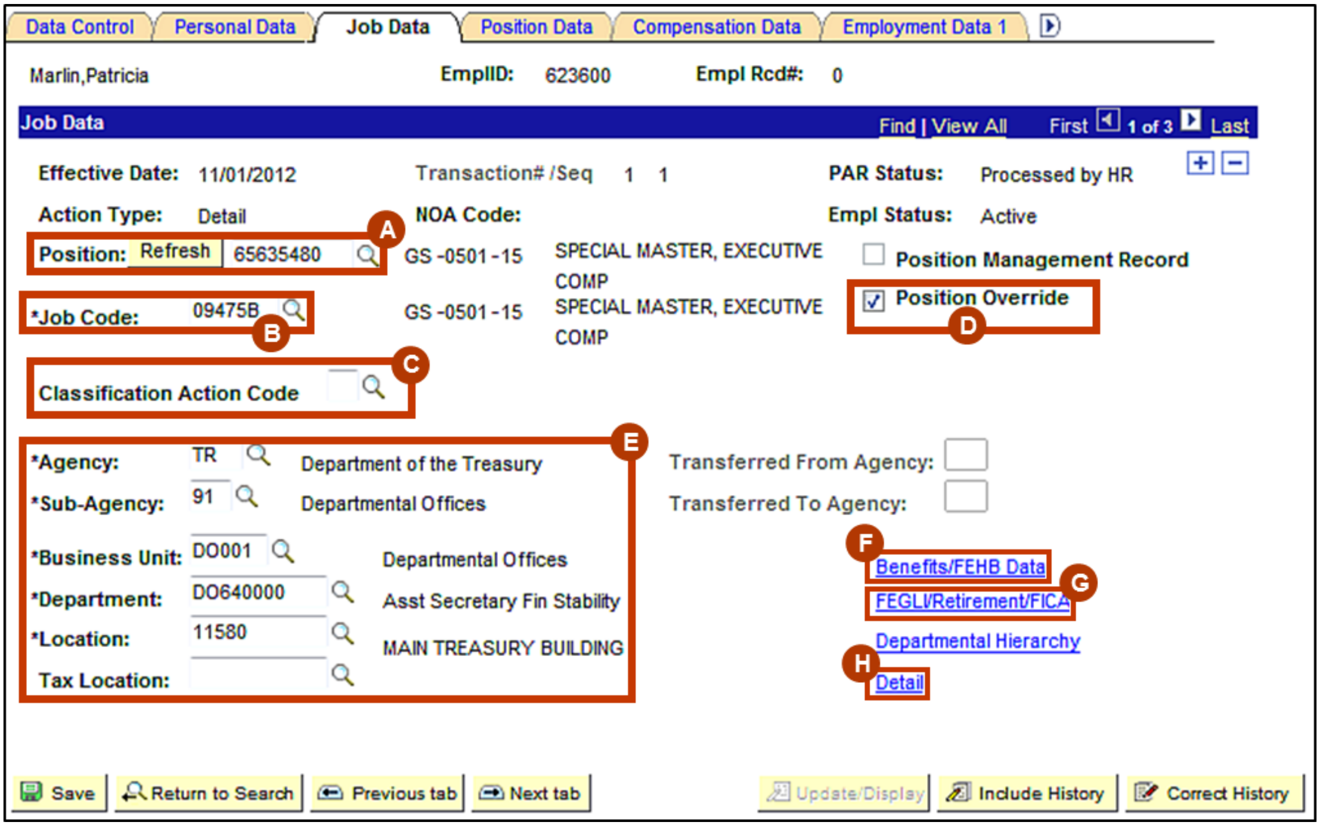


Chapter 13 Figure 206: Personal Data Tab

- **A. Identifying Information**- This includes the employee's Name, Gender, Date of Birth, Mailing/Home Address, etc.
- **B. Citizenship Status**- Identifies the employee's home country and citizenship status.
- **C. Race and Ethnicity-Disability**- This link takes you to the **Race and Ethnicity-Disability** page. Here you can enter, view, or update the employee's disability status, race, and/or ethnicity.
- **D. Veterans Info**- This link takes you to the **Veterans Info** page, wherein you may enter, view, or update the employee's veterans status.
- **E. National ID**- Identifies the employee's Social Security Number or National ID.

JOB DATA TAB

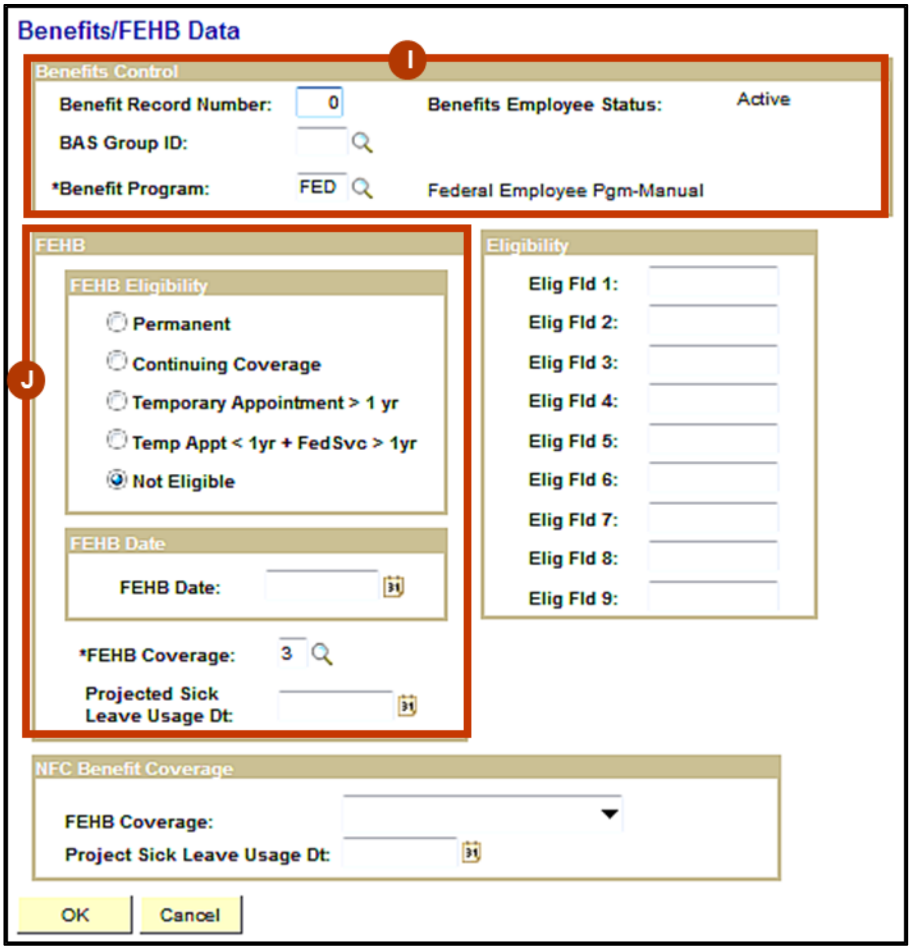
The **Job Data** tab provides organizational and benefits related information relating to a particular job.



Chapter 13 Figure 207: Job Data Tab

A. **Position**- Identifies the employee's **Position Number**.
B. **Job Code**- Identifies the **Job Code** associated with the employee's **Position Number**.
C. **Classification Action Code**- When an employee leaves a position, this code communicates to NFC what action should be taken regarding the vacant position (i.e., 0 = Leave Vacant, 1 = Abolish Position, 2 = Inactivate Position).
D. **Position Override**- When the checkbox is filled, this allows users to override position defaults by making grayed out fields accessible.
E. **Work Location**- the employee's Agency, Business Unit, Department, Location, etc.
F. **Benefits/FEHB Data Link**- This link takes you to the **Benefits/FEHB Data** page (shown below), wherein you to view or edit employee benefits plan data.
G. **FEGLI/Retirement/FICA Link**– This link takes you to the **FEGLI/Retirement/FICA** page (shown below), wherein you can view or edit an employee's Federal Employees Group Life Insurance (**FEGLI**), Retirement, and/or Federal Insurance Contributions Act (**FICA**) **Status** data.
H. **Detail Link**- This link takes you to the **Detail Assignment** page, wherein you may view or enter the employee's **Detail Position Number**.

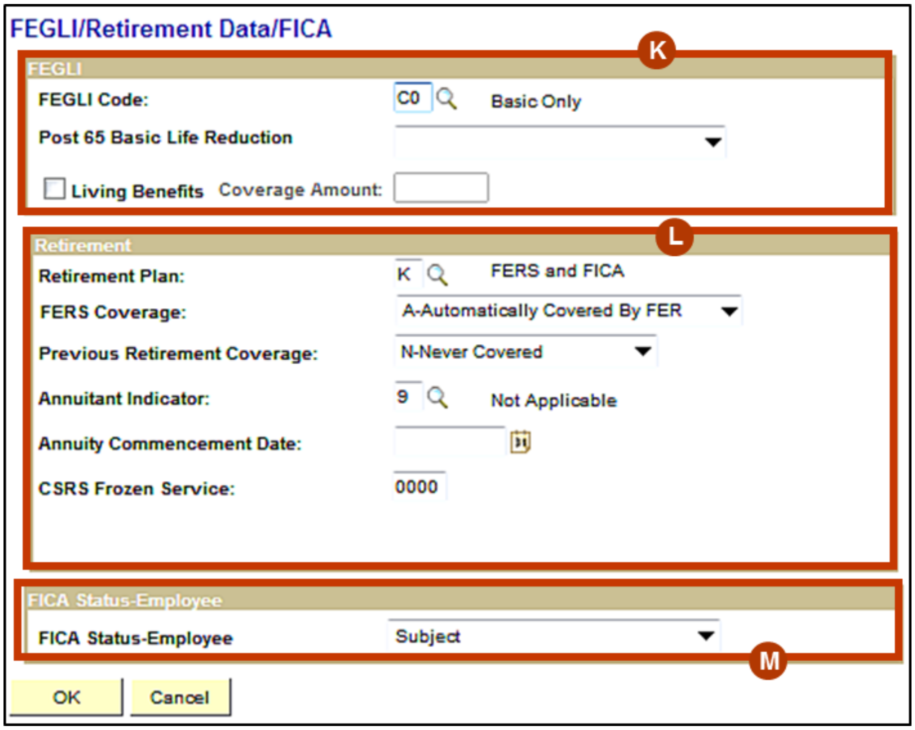
The **Benefits/FEHB Data** page is presented in more detail below:



Chapter 13 Figure 208: Benefits/FEHB Data Page

I. **Benefits Control**- This pagelet includes the employee's Benefit Record Number, Group ID, and Benefit Program code.
J. **FEHB**- This pagelet includes Federal Employee Health Benefits (**FEHB**) data, including **FEHB Eligibility**, **Date**, **Coverage** code, and the employee's **Projected Sick Leave Usage Date**.

The **Benefits/FEHB Data** page is presented in more detail below:



Chapter 13 Figure 209: FEGLI/Retirement Data/FICA Page

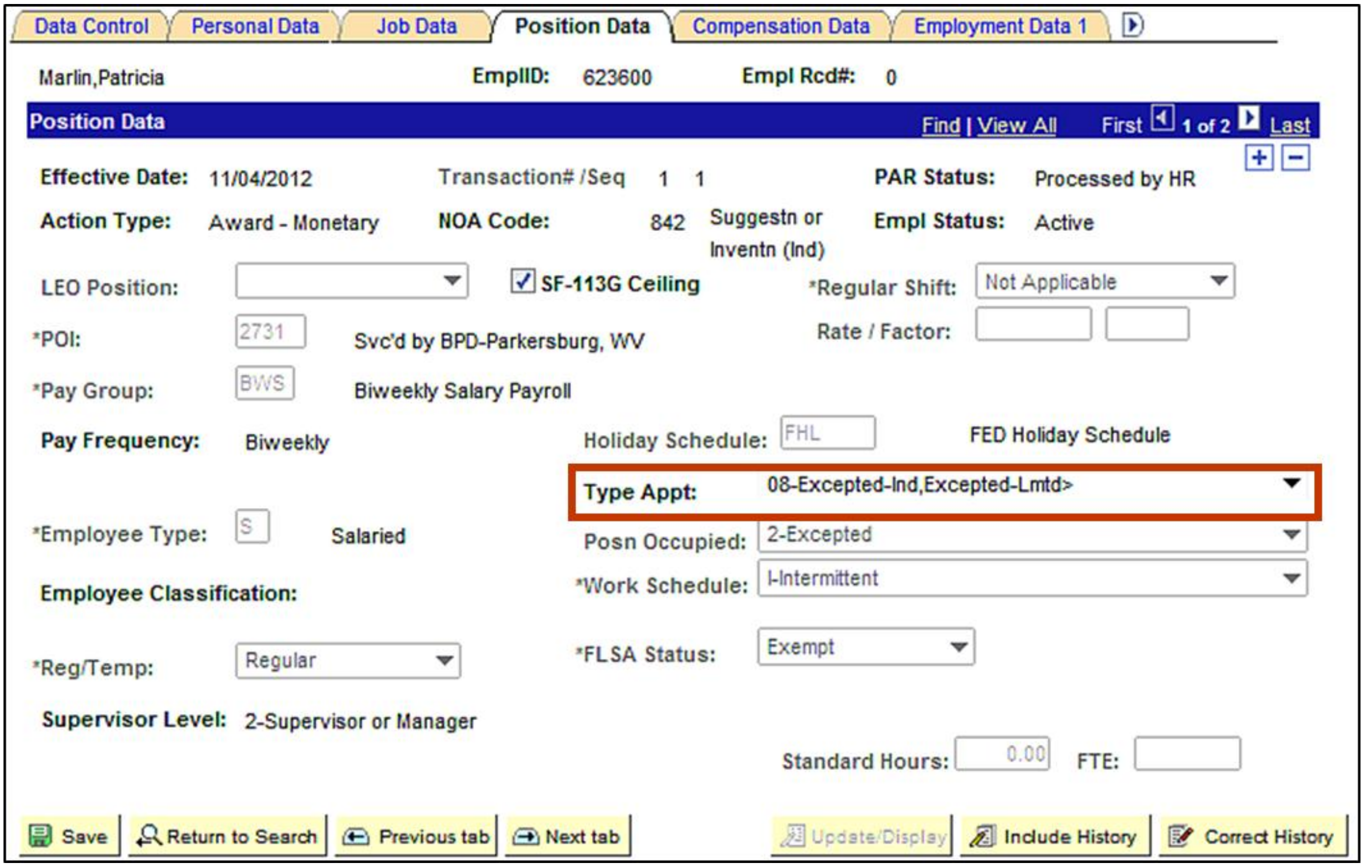
K. **FEGLI**- This pagelet identifies the employee's Federal Employees Group Life Insurance (**FEGLI**) **Code**, **Post 65** (Military) **Basic Life Reduction** percentage, and living benefits coverage. (To enter a **Coverage Amount**, the **Living Benefits** checkbox must be filled.)

L. **Retirement**- This pagelet includes information pertaining to the employee's retirement plan, coverage, and annuity.

M. **FICA Status-Employee**- Identifies the employee's Federal Insurance Contributions Act (**FICA**) **Status** (i.e., Exempt, Medicare, or Subject).

POSITION DATA TAB

The **Position Data** tab presents information relating to the employee's position. This information defaults from the position number on the Job Data tab. The majority of information will remain greyed out unless its corresponding NOA Code is entered (e.g., **782** to modify **Standard Hours**, **781** to modify **Work Schedule**, etc.). Appointment Type (**Type Appt**) can be edited without a specific NOA code.



Chapter 13 Figure 210: Position Data Tab

COMPENSATION DATA TAB

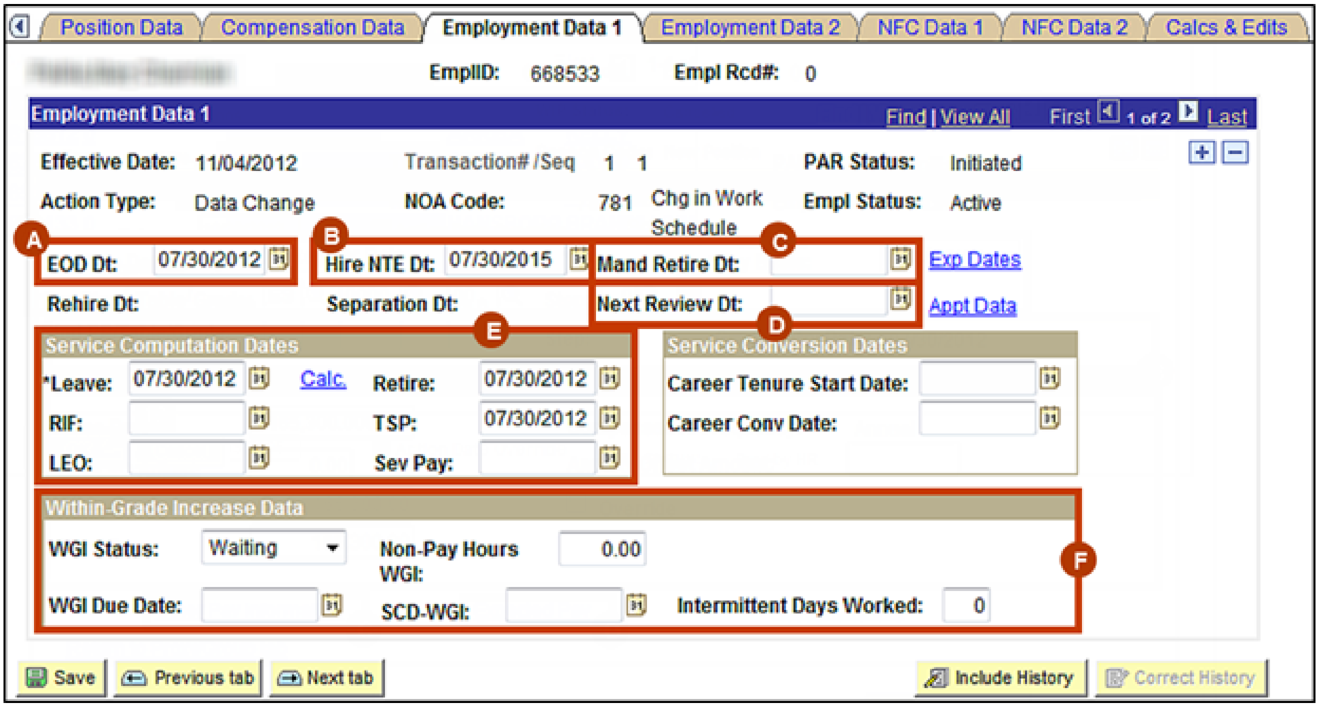
The **Compensation Data** tab presents information pertaining to an employee's financial or other compensation (e.g., Pay Plan, Base Salary, Pay Basis, etc.).

Chapter 13 Figure 211: Compensation Tab Items Labeled

A. **Compensation Information**- Identifies the employee's Pay Rate Determinant, Pay Basis, and Pay Plan/Table/Grade & Step.
B. **Quoted Pay-** Indicates the employee's **Base Pay**, Locality and Law Enforcement Officer Adjustment (**Loc/LEO Adj**), **Adjusted Base Pay**, and **Total Pay**. If necessary, you may edit this information by selecting the **Override** checkbox.
C. **Other Pay Information-** Opens the **Other Pay Information** page wherein you may review or enter the sources of additional compensation beyond the employee's base pay.
D. **Expected Pay-** Opens the **Expected Pay** page, wherein you may review the employee's expected pay determined by Base Pay, Adjustments, and Other Pay.

EMPLOYMENT DATA 1 TAB

The **Employee Data 1** tab presents information pertaining to an employee's Within-Grade Increase Data. In addition, this tab presents the employee's service computation, mandatory retirement, and next performance review dates (among others).

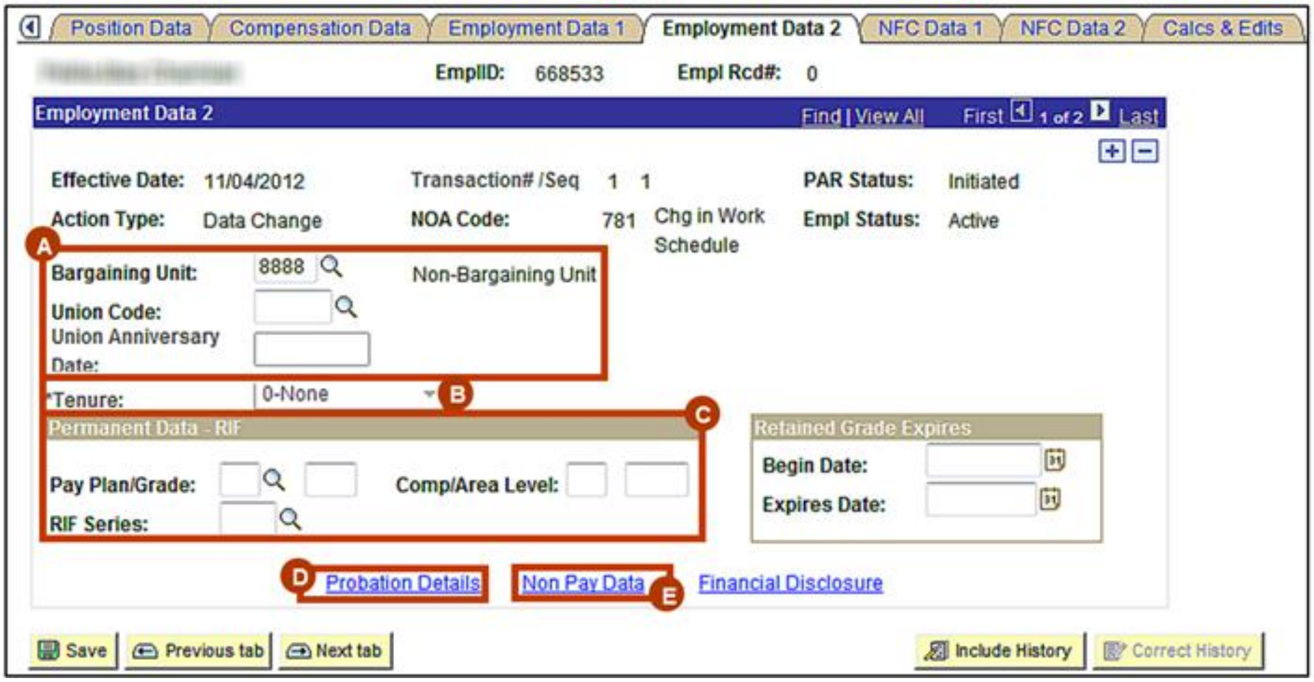


Chapter 13 Figure 212: Employment Data 1 Tab Items Labeled

A. **EOD Dt.-** The Entered On Duty (EOD) Date indicates the effective date of the hire request.
B. **Hire NTE Dt**- Indicates the date that an employee's temporary employment is scheduled to end.
C. **Mand Retire Dt**- Identifies the Mandatory Retirement Date for employees who encumber Law Enforcement Officer (LEO) positions.
D. **Next Review Dt-** Indicates the next date set for the employee to undergo a performance evaluation.
E. **Service Computation Dates**- Identifies the dates marking the beginning of the employee's **Leave**, Retirement, Reduction In Force (**RIF**), Thrift Savings Plan (**TSP**) eligibility, Law Enforcement Officer (**LEO**) retirement, and Severance Pay (**Sev Pay**) computations.
F. **Within-Grade Increase**- Indicates the **Status**, **Non-Pay Hours**, **Due Date**, **Service Computation Date**, and **Intermittent Days Worked** associated with a Within-Grade Increase (WGI).

EMPLOYMENT DATA 2 TAB

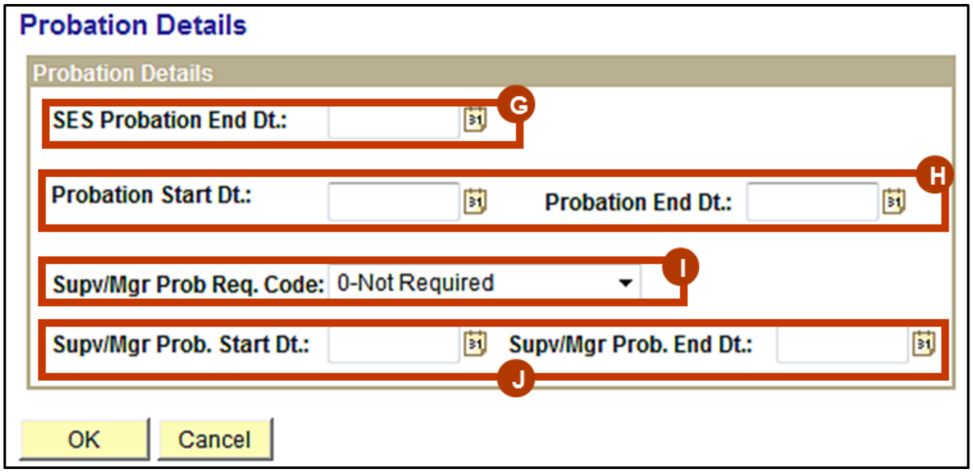
The **Employee Data 2** tab presents information pertaining to an employee's position information, tenure status, and compensation. It includes links to the **Probation Details** and **Non Pay Data** pages.



Chapter 13 Figure 213: Employment Data 2 Tab – Items Labeled

- **A. Employment Data**– Indicates position related employment information (e.g., **Bargaining Unit**, **Union Code**, and **Union Anniversary Date**). These fields default from the employee's position number.
- **B. Tenure**- Indicates the employee's tenure status.
- **C. Permanent Data - RIF**- Identifies the employee's Pay Plan and Grade (**Pay Plan/Grade**), Compensation Area and Compensation Level (**Comp/Area Level**), and Reduction In Force Series (**RIF Series**).
- **D. Probation Details**- Opens the Probation Details page (shown below), wherein you may review or enter the employee's probation information.
- **E. Non Pay Data**- Opens the **Non Pay Data** page (shown below), wherein you may review or enter the employee's **Last Date Worked**, Service Computation Date (**SCD**) **Hours**, **Probation Hours**, and/or **Career Tenure Hours**.

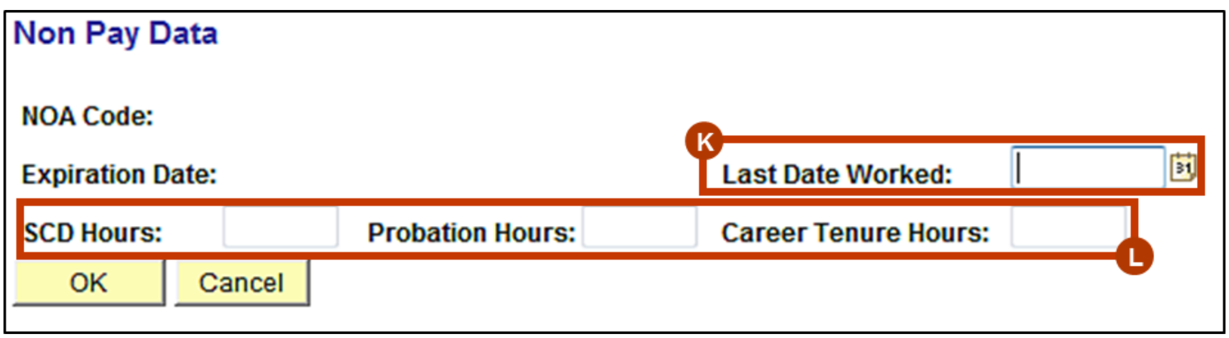
The **Probation Details** page is presented in more detail below:



Chapter 13 Figure 214: Probation Details Page Items Labeled

G. **SES Probation End Dt.**– Indicates the probation end date for an employee appointed into Senior Executive Services (SES).
H. **Probation St. and End Dt.**- Indicates the probation start and end dates for an employee hired into a career-conditional appointment.
I. **Supv/Mgr Prob Req. Code**- Identifies whether the probationary period for a supervisor/manager is required, served, or not required.
J. **Supv/Mgr Prob Start and End Dt**- Indicates the probation start and end dates for an employee with supervisor/manager duties.

The **Non Pay Data** page is presented in more detail below:

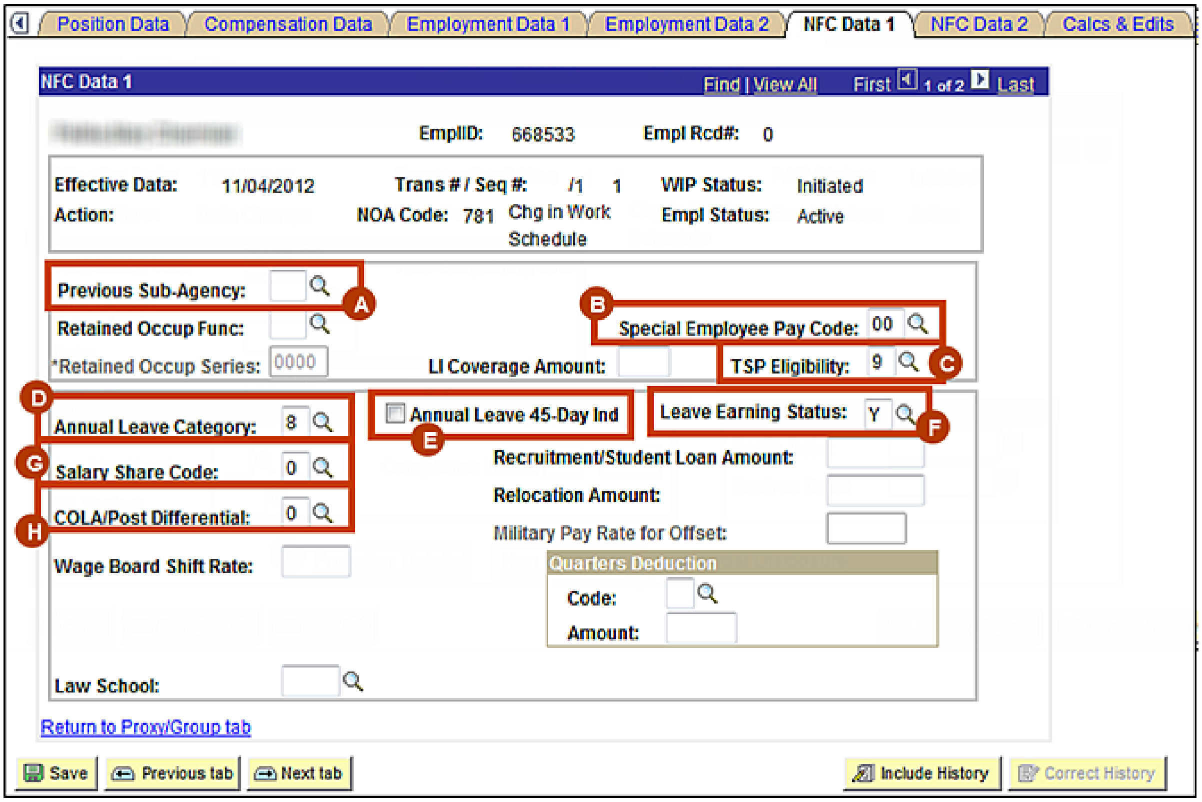


Chapter 13 Figure 215: Non Pay Data Page

K. **Last Date Worked**– Indicates the last day of the employee's pay status.
L. **Hours**- These fields indicate the employee's Service Computation Date (**SCD**), **Probation**, and **Career Tenure Hours**.

NFC DATA 1 TAB

The **NFC Data 1** tab presents information pertaining to an employee's previous agency, pay category, Thrift Savings Plan (TSP) eligibility, leave allowance category/status, and Cost of Living Allowance (COLA).

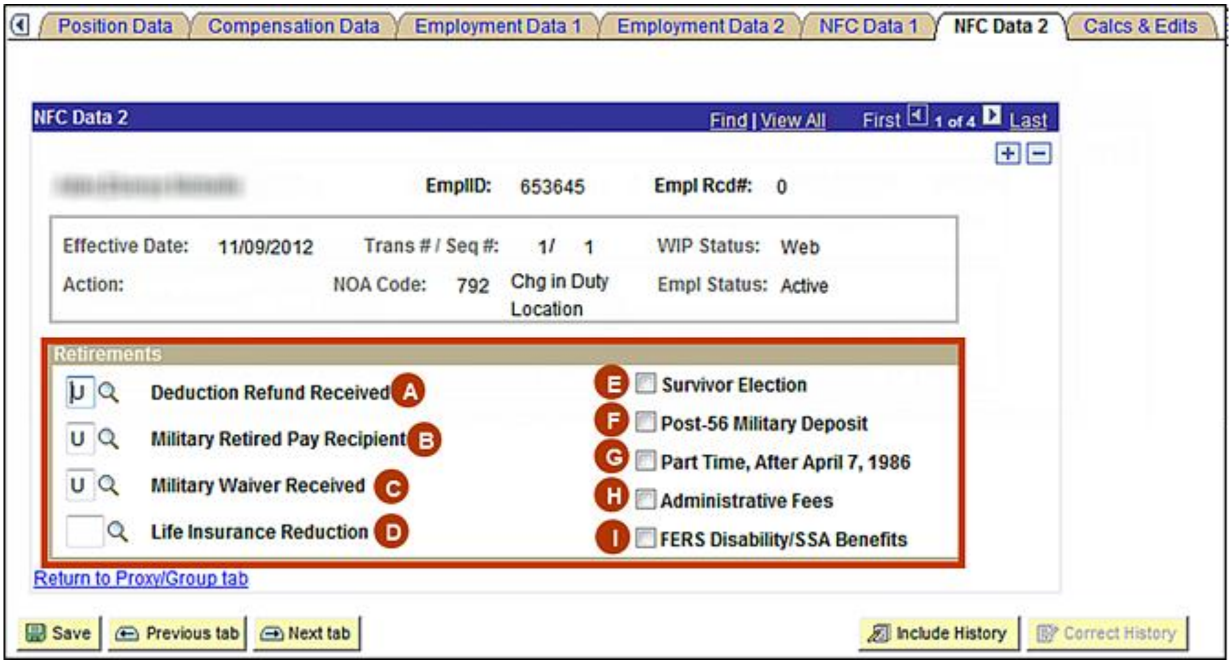


Chapter 13 Figure 216: NFC Data 1 Tab Items Labeled

A. **Previous Sub-Agency**– Indicates the previous agency for which the employee worked.
B. **Special Employee Pay Code**- Identifies the employee as belonging to a category requiring special processing (e.g., Presidential Appointment, Federal Summer Intern, etc.).
C. **TSP Eligibility**- Indicates whether the employee is eligible for the Thrift Savings Program (TSP).
D. **Annual Leave Category**- Identifies the employee's category for accruing paid leave from work.
E. **Annual Leave 45-Day Ind**- When the checkbox is filled, this indicates that the employee can carry a maximum annual leave accumulation of forty five days from one year to the next.
F. **Leave Earning Status**- Indicates that the employee is entitled to earn leave for the first leave eligible pay period.
G. **Salary Share Code**- Indicates outside source that pays a portion, or all, the salary earned by a cooperative employee or re-employed annuitant.
H. **COLA/Post Differential**- Identifies the employee's Cost of Living Allowance (COLA).

NFC Data 2 Tab

The **NFC Data 2** tab presents information pertaining to retirement benefits and military service.

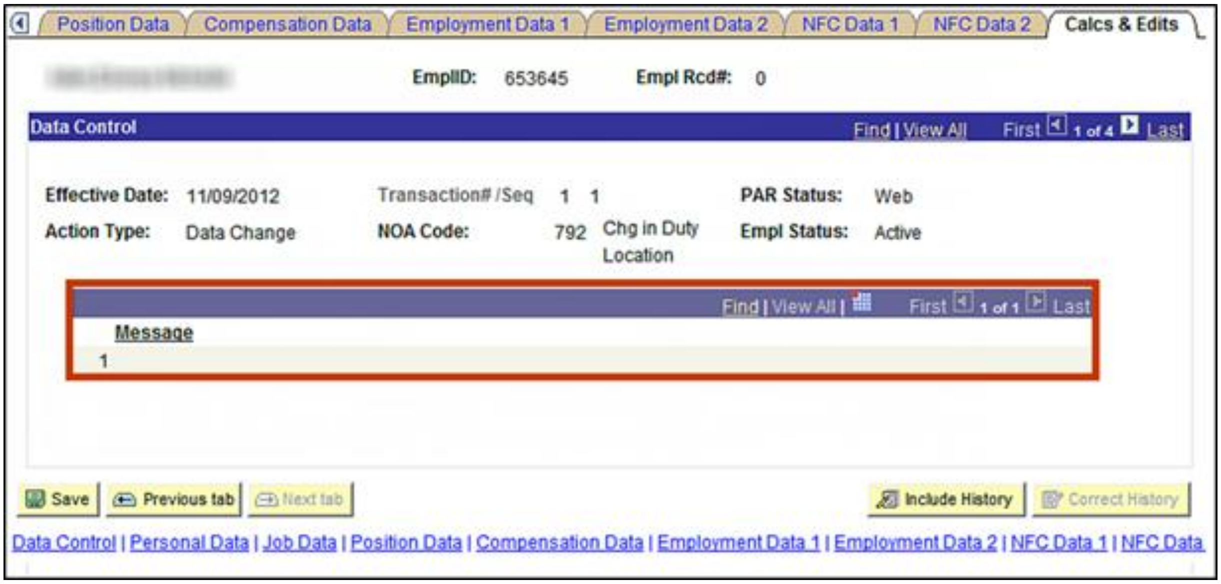


Chapter 13 Figure 217: NFC Data 2 Tab

A. **Deduction Refund Received**– Indicates whether or not the employee has received a refund of his/her retirement contributions and has repaid it.
B. **Military Retired pay Recipient**- Indicates whether or not the employee is receiving retired military pay.
C. **Military Waiver Received**- Indicates whether the employee has waived his/her retired military pay.
D. **Life Insurance Reduction**- Indicates the employee's post-retirement life insurance reduction.
E. **Survivor Election**- When the checkbox is filled, this indicates that the employee has elected survivor benefits.
F. **Post-56 Military Deposit**- When the checkbox is filled, this indicates that the employee has paid for his/her post 1956 military service and is not receiving military retired pay.
G. **Part Time, After April 7, 1986**- When the checkbox is filled, this indicates that the employee has part time service since 1986.
H. **Administrative Fees**- When the checkbox is filled, this indicates costs associated with separation incentive payments.
I. **FERS Disability/SSA Benefits**- When the checkbox is filled, this indicates that the employee has retired with a Federal Employees Retirement System (FERS) disability and/or is receiving social security disability benefits.

CALCS & EDITS TAB

The **Calcs & Edits** tab presents information pertaining to errors that might occur during the authorization and processing of an action. When an action fails to save, an error **Message** will appear with more information about the error.



Chapter 13 Figure 218: Calcs & Edits Tab

AUTHORIZING A PAR ACTION IN HRSS

After a PAR action has been initiated via either MSS or HRSS, it is then routed to Human Resources for further authorization. The authorization process may vary, based on your organizations requirements, but all MSS initiated PARs require first level authorization before they can be processed.

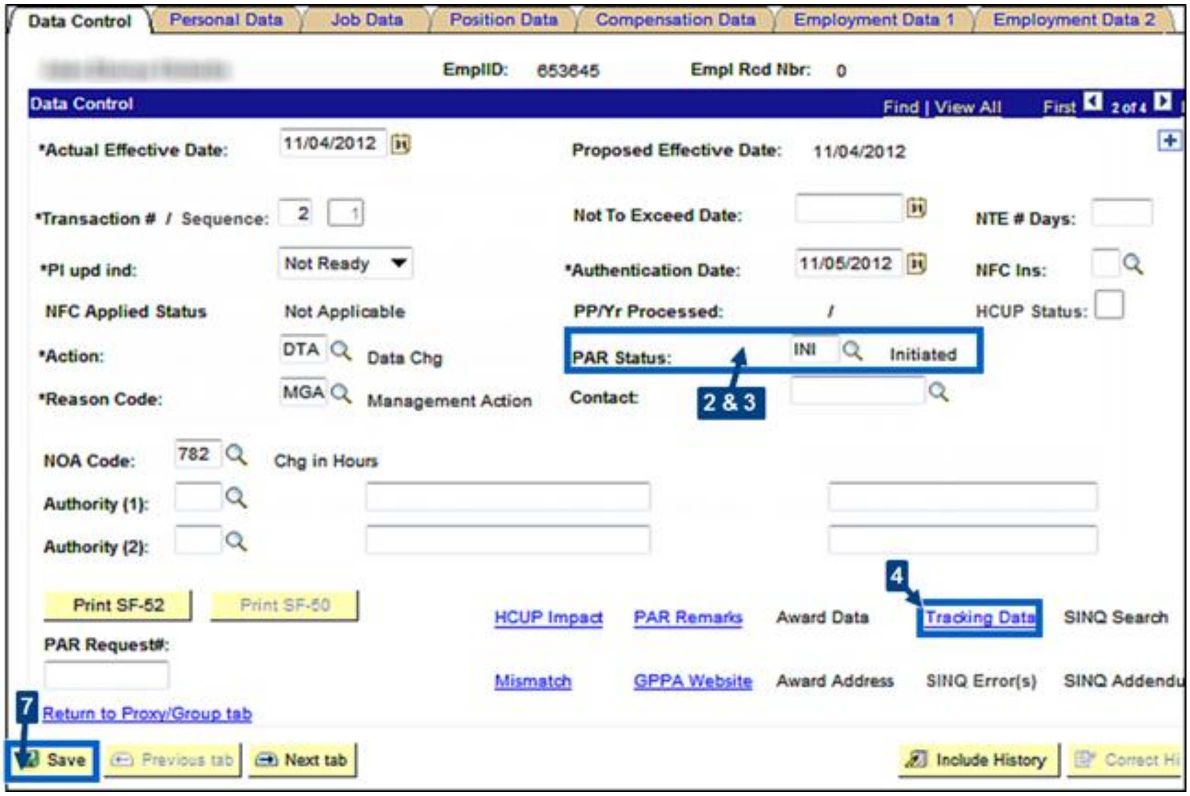
The following is a generic walkthrough for authorizing a PAR action:

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control tab***

OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control tab***

1. Verify the data associated with the PAR under review.
2. (To **Approve**): In the **PAR Status** field, enter or lookup the current authorization level (**HR1**, **HR2**, or **HR3**).
3. (To **Disapprove**): In the **PAR Status** field, select **REJ** to reject the action or **RET** to return the action to the previous authorizer for more information.
4. Select the **Tracking Data** link.
5. On the **Job Tracking Info** page, enter **Comments** regarding the change in **PAR Status**. (This is required when rejecting or returning an action.)
6. Select the **OK** button.
7. On the Data Control tab, select the **Save** button. (If the **PAR Status** is set to **HR1**, **HR2**, or **HR3**.you will be taken to the **Route To Next Empl ID** page. If the **PAR Status** is set to **REJ** or **RET**, your work will be saved and the **Data Control** tab will refresh.)



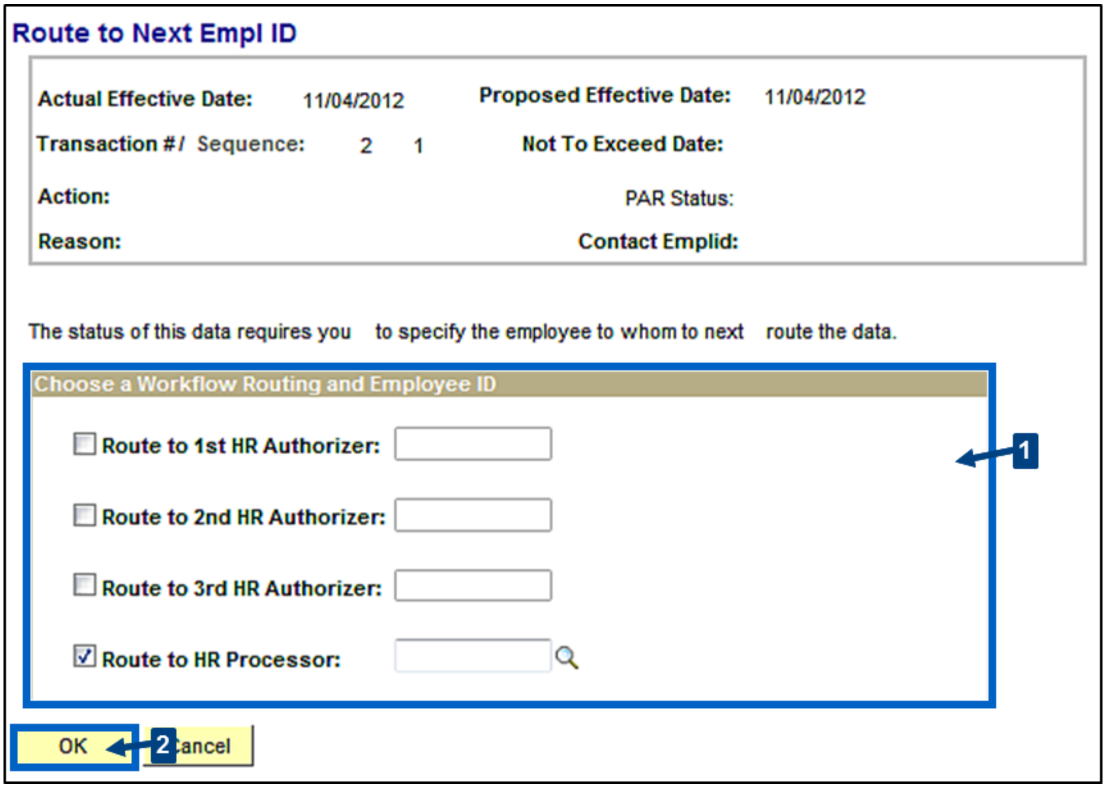
Chapter 13 Figure 219: Data Control Tab

Routing a PAR Action In HRSS

After a PAR action has been authorized via HRSS, it then needs to be routed to the next authorizer to continue the authorization, or to the HR Processor to process the action. Routing the action will place that action in the appropriate worklist from which the next authorizer or the HR processor will select and work the action.

To route a **PAR** action:

1. On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer** or **HR Processor**.
2. Select the **OK** button. (This will route the action to the selected individual and return you to the employee's record.)



Chapter 13 Figure 220: Route To Next Empl ID Page

Processing a PAR Action In HRSS

Once a PAR action has been approved through the authorization process, it is then routed for processing.

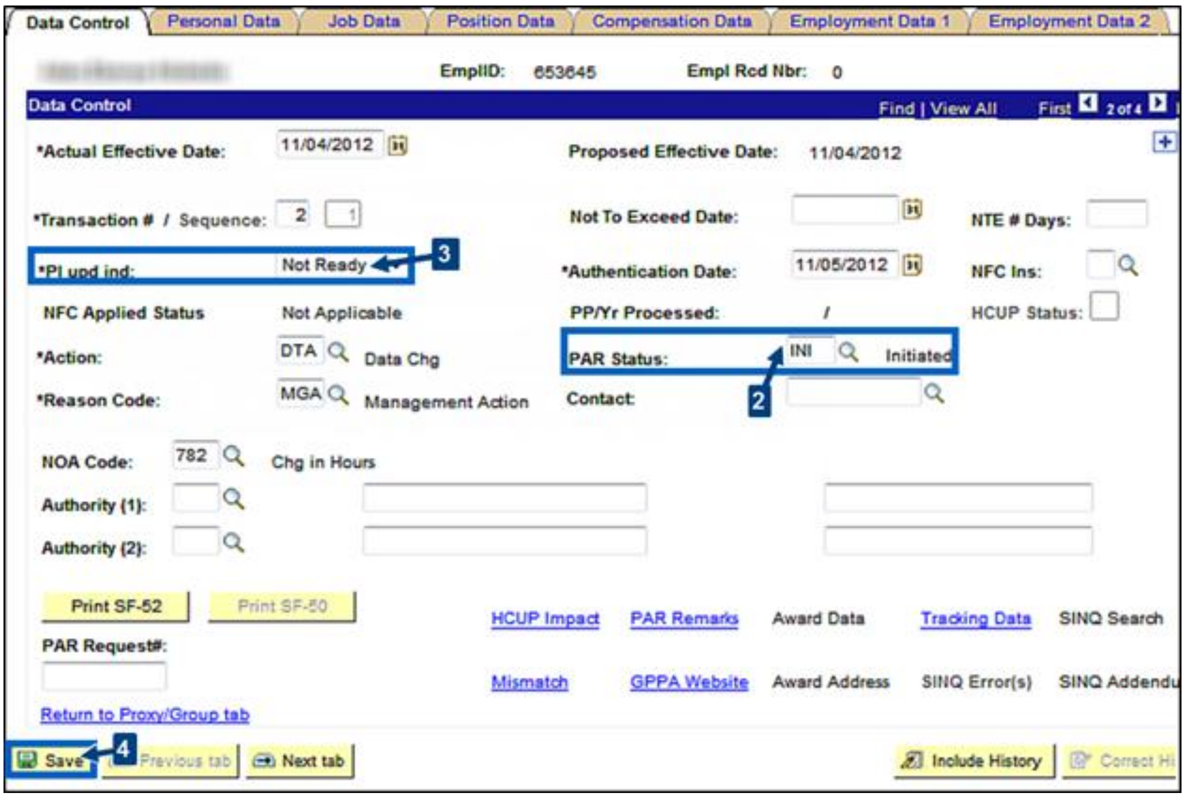
To process a **PAR** action:

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control tab***

OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control tab***

1. Verify the data associated with the PAR under review.
2. In the **PAR Status** field, enter or lookup **HR**.
3. In the **PI upd ind** dropdown menu, select **Ready**.
4. Select the **Save** button. (This will save your work and refresh the **Data Control** tab.)



Chapter 13 Figure 221: Data Control Tab- Processing A PAR

13.2 Initiating a Hiring (Accession) Action

An accession action is one in which a vacant position is filled by a new hire that doesn't already exist in the system. Two methods for performing an accession action are:

- Hire Employee USF
- Hire Wizard

In the **Hire Employee USF** method, a single empty row is created so that a new hire's record can be generated in HR Connect. The **Hire Wizard** method utilizes a simplified form to simultaneously create and populate data into a new hire's record. Both methods require that the same information be entered, and differ only in the presentation of the necessary fields for completing an accession action.

As the **Hire Wizard** provides the simplest tool for initiating accession actions, the **Hire Employee USF** method will not be covered in this section.

To initiate, authorize, and process an accession action:

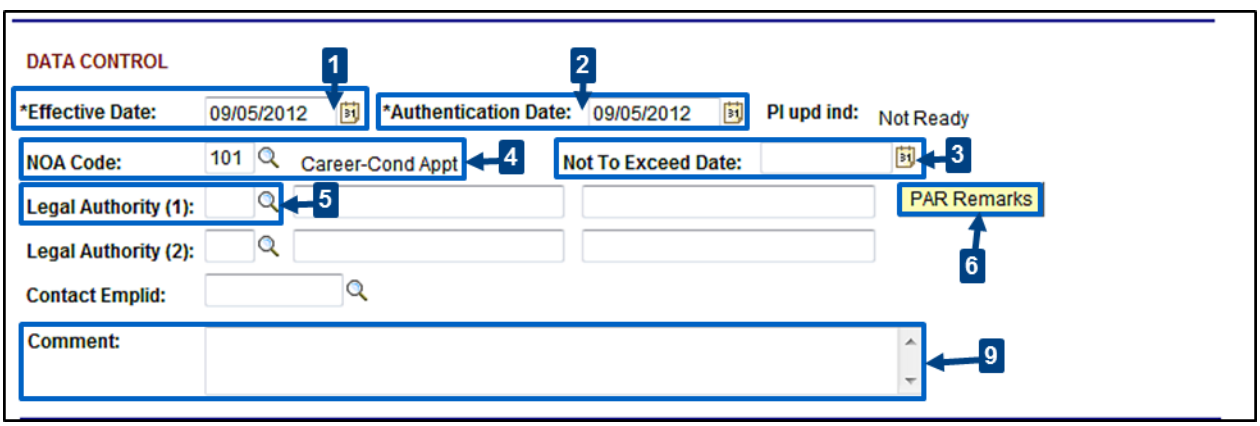
INITIATING A HIRING (ACCESSION) ACTION VIA THE HIRE WIZARD

Front End: *HR tab>HR Processing pagelet>Hire Wizard link>Hire Wizard PAR page*

OR

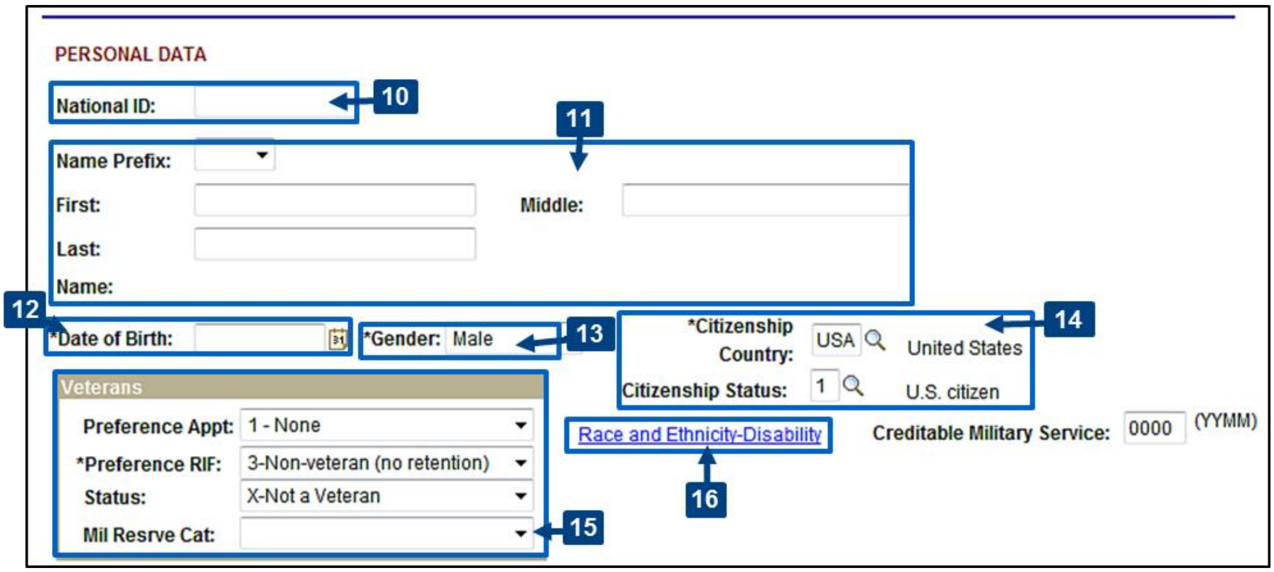
Back End: *Menu tab>Workforce Administration menu>Job Information menu>Hire Wizard menu>Hire Wizard link>Hire Wizard – PAR page*

1. In the **Data Control** pagelet, enter or select the **Effective Date**.
2. (Optional): Verify the **Authentication Date**.
3. (Optional): Enter or select the **Not to Exceed Date**.
4. Enter or select the appropriate **NOA Code**.
5. Enter or lookup the legal authority in the **Legal Authority (1)** field.
6. Select the **PAR Remarks** button.
7. On the **PAR Remarks** page, enter the probationary period dates in the **PERIOD BEGINNING @ @** row.
8. Select the **OK** button.
9. (Optional): In the Data Control pagelet, enter a **Comment**. (This will appear on the action's **Tracking Data** page.)



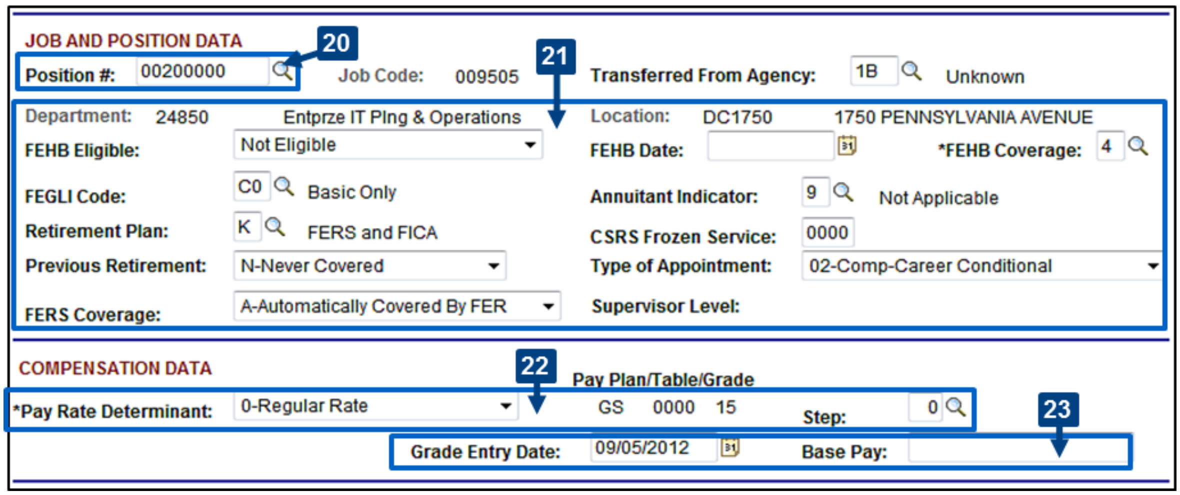
Chapter 13 Figure 222: Hire Wizard – Data Control Pagelet

10. In the Personal Data pagelet, enter the new hire's **Social Security Number/National ID**.
11. Enter the new hire's **Name**.
12. Enter the new hire's **Date of Birth**.
13. Enter the new hire's **Gender**.
14. Enter or lookup the appropriate **Citizenship Country** and **Status**.
15. Select the appropriate veteran's preference information in the **Veterans** pagelet.
16. Select the **Race and Ethnicity Disability** link.



Chapter 13 Figure 223: Hire Wizard - Personal Data Pagelet

17. On the Race and Ethnicity-Disability page, select the new hire's **Racial Category**.
18. Enter or lookup the appropriate **Disability Code**.
19. Select the **OK** button.
20. In the **Job and Position Data** pagelet, enter or lookup the **Position #**.
21. Verify the job and position information entered (e.g., **FEHB Coverage**, **Retirement Plan**, etc.).
22. In the **Compensation Data** pagelet, select the appropriate **Pay Rate Determinant** and **Step**.
23. Enter or verify **Grade Entry Date** and **Base Pay**.

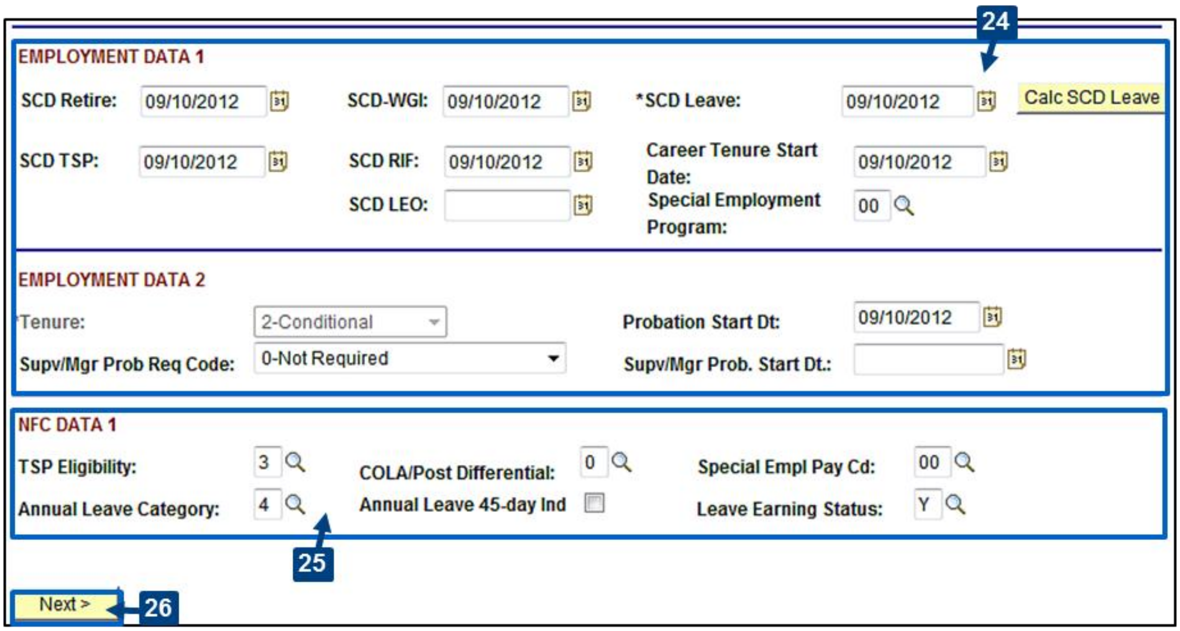


Chapter 13 Figure 224: Hire Wizard – Job And Position Data & Compensation Data Pagelet

24. In the **Employment Data** pagelets, verify the scheduled start dates **tenure**, **retirement**, **probation**, and **leave** calculations.

25. In the **NFC DATA 1** pagelet, verify NFC Data (e.g., **TSP Eligibility**, **Leave Earning Status**, etc.).

26. Select the **Next** button.



Chapter 13 Figure 225: Hire Wizard – Employment Data & NFC Data Pagelets

27. On the **Address** tab, enter the new hire's **Residence** and **Check Addresses**.
28. Select the **Next** button.
29. On the **Education** tab, enter or lookup the new hire's highest **Degree**.
30. (Optional): Enter additional education information (e.g., **GPA**, **Major**, **School**, etc.).
31. Select the **Next** button.
32. On the **Workflow Routing** tab, enter or lookup the appropriate **HR Authorizer**.
33. Select the **Submit** button. (The page will refresh and a confirmation message displays, stating that your accession action has been successful. It will additionally provide you with the new hire's Employee's ID number.)

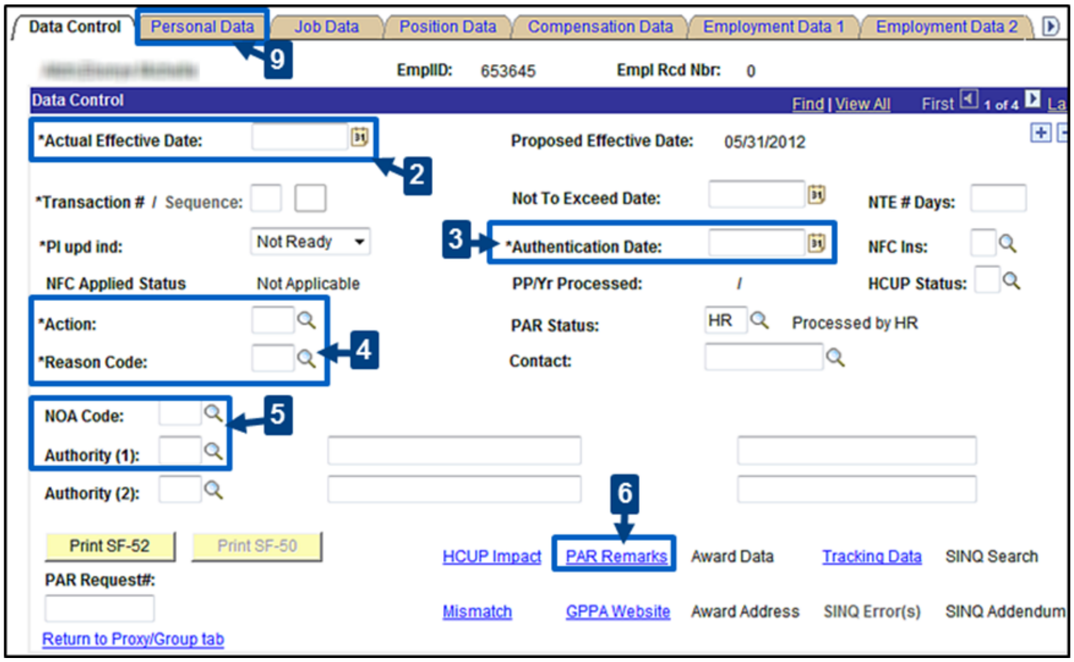
Authorizing & Processing an Accession Action in HRSS

Individual Worklist: ***HR tab>Worklist pagelet***

OR

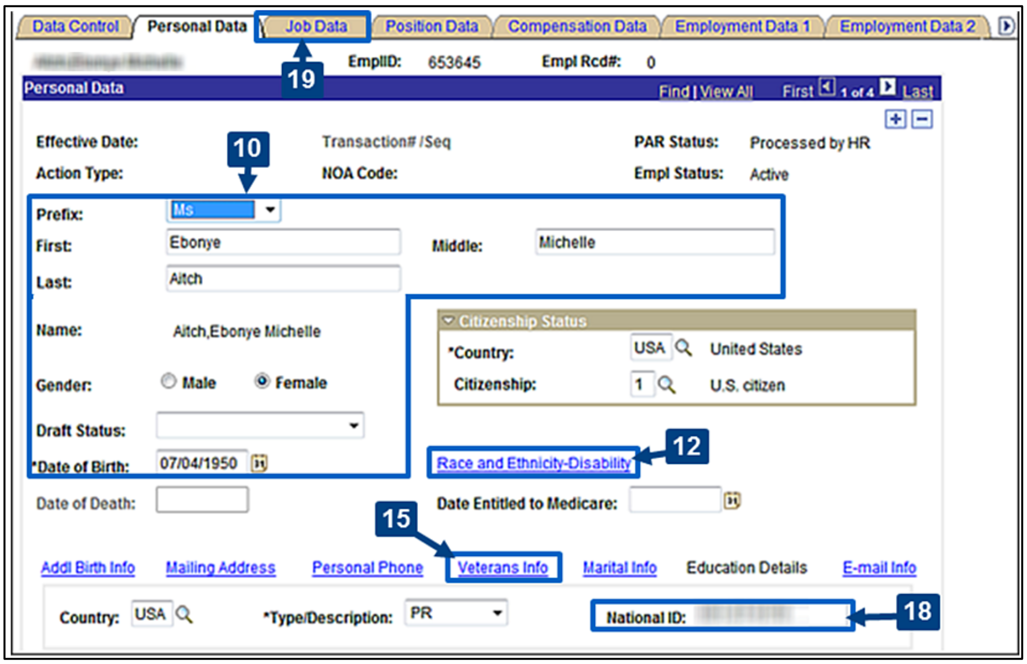
Group Worklist: ***Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Worklist For Group page***

1. Select the appropriate **Hiring Action** from your worklist.
2. On the **Data Control** tab, verify the **Actual Effective Date**.
3. Verify the **Authentication Date**.
4. Verify the **Action** and **Reason Code**.
5. Verify the **NOA Code** and **Authority (1) fields**.
6. Select the **PAR Remarks** link.
7. On the **PAR Remarks** page, verify the **PAR Remarks** are correct.
8. Select the **OK** button.
9. Select the **Personal Data** tab.



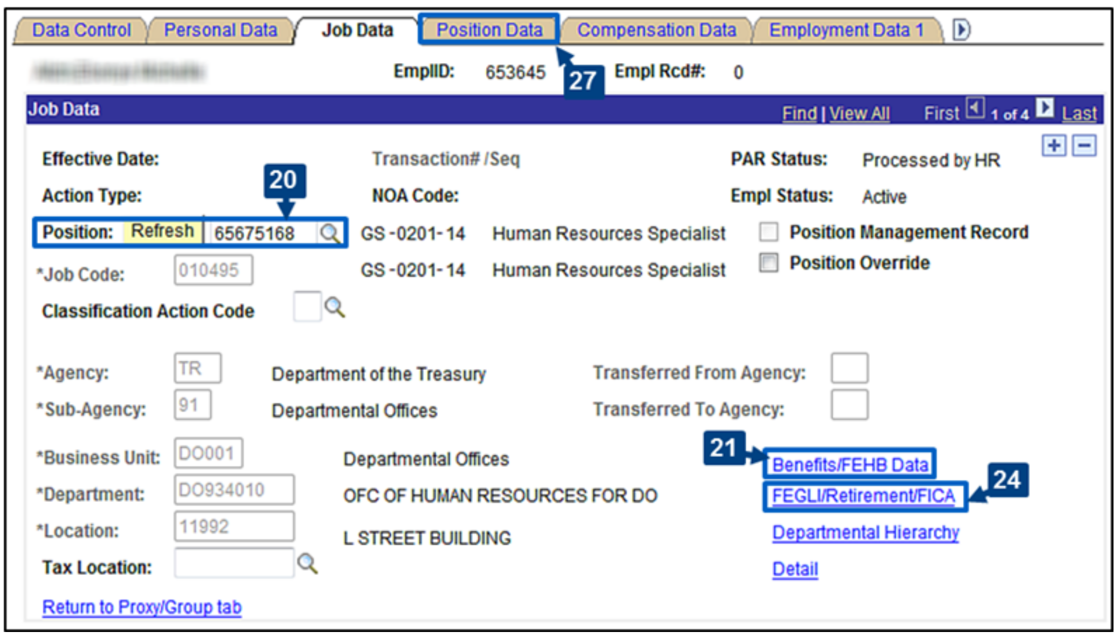
Chapter 13 Figure 226: Data Control Tab – Accession Action

10. On the **Personal Data** tab, verify the new hire's **Name**, **Gender**, and **Date of Birth**.
11. Verify the new hire's **Citizenship Status**.
12. Select the **Race and Ethnicity-Disability** link.
13. On the **Race and Ethnicity-Disability** page, verify the new hire's **Ethnicity** and **Disability** status.
14. Select the **OK** button.
15. On the **Personal Data** tab, select the **Veterans Info** link.
16. On the **Veterans Info** page, verify the new hire's **Veterans Status**.
17. Select the **OK** button.
18. On the **Personal Data** tab, verify the new hire's **National ID**.
19. Select the **Job Data** tab.



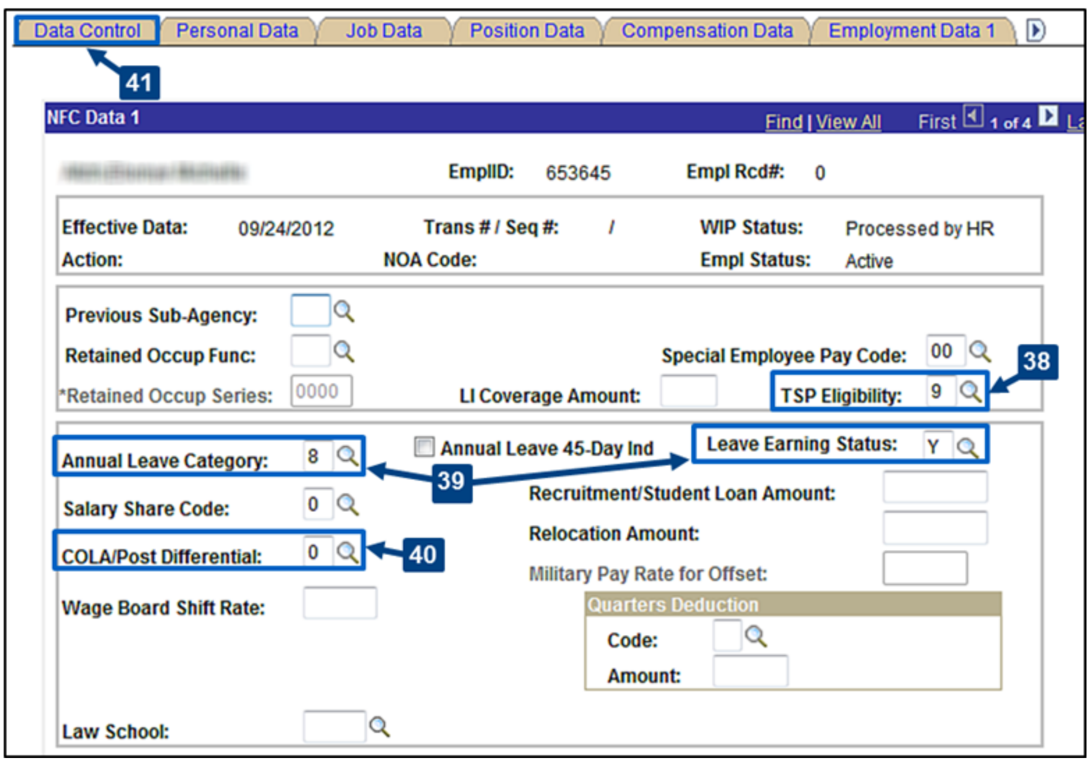
Chapter 13 Figure 227: Personal Data Tab – Accession Action

20. On the **Job Data** tab, verify the new hire's **Position #**.
21. Select the **Benefits/FEHB Data** link.
22. On the Benefits/FEHB Data page, verify the new hire's **Benefits Program**, **FEHB Eligibility**, and **FEHB Coverage**.
23. Select the **OK** button.
24. On the Job Data tab, select the **FEGLI/Retirement Data/FICA** link.
25. On the **FEGLI/Retirement Data/FICA page**, verify the following fields:
    a. **FEGLI Code**.
    b. **Retirement Plan**.
    c. **FERS Coverage**.
    d. **Previous Retirement Coverage**.
    e. **Annuitant Indicator**.
26. Select the **OK** button.
27. Select the **Position Data** tab.



Chapter 13 Figure 228: Job Data Tab – Hiring Action

28. On the **Position Data** tab, verify the position information.
29. Verify the **Appointment Type**.
30. Select the **Compensation Data** tab.
31. On the **Compensation Data** tab, verify the **Pay Rate Determinant**, **Pay Basis**, and **Pay Plan/Table/Grade**.
32. Select the **Employment Data 1** tab.
33. On the **Employment Data 1** tab, verify the **Service Computation Dates**.
34. Select the **Employment Data 2** tab.
35. On the **Employment Data 2** tab, verify the new hire's **Tenure** status.
36. (If Career Conditional): Verify the probationary period on the **Probation Details** page via the **Probation Details** link.
37. Select the **NFC Data 1** tab.
38. On the **NFC Data 1** tab, select the appropriate **TSP Eligibility**.
39. Verify the **Annual Leave Category** and **Leave Earning Status**.
40. Verify the **COLA** (Cost of Living Allowance).
41. Select the **Data Control** tab.



Chapter 13 Figure 229: NFC Data 1 Tab – Hiring Action

42. On the **Data Control** tab, enter or lookup the appropriate **PAR Status**.
43. (HR Processor Only): In the **PI upd ind** dropdown menu, select **Ready**.
44. Select the **Save** button.
45. (HR Authorizer Only): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
46. (HR Authorizer Only): Select the **OK** button. (This will take you to the **Data Control** tab).

13.3 Awards

Overview

This section outlines the procedure for initiating and processing the following employee awards:

- Individual Cash Award
- Foreign Language (Law Enforcement) Award
- Travel Savings Incentive (Gainsharing)
- Individual Time Off Award
- Quality Step Increase (QSI)

These awards can be monetary or non-monetary. While they may be initiated via MSS, processing by an HRSS user is required. In addition to Individual Awards, this section includes a walkthrough for Mass Awards.

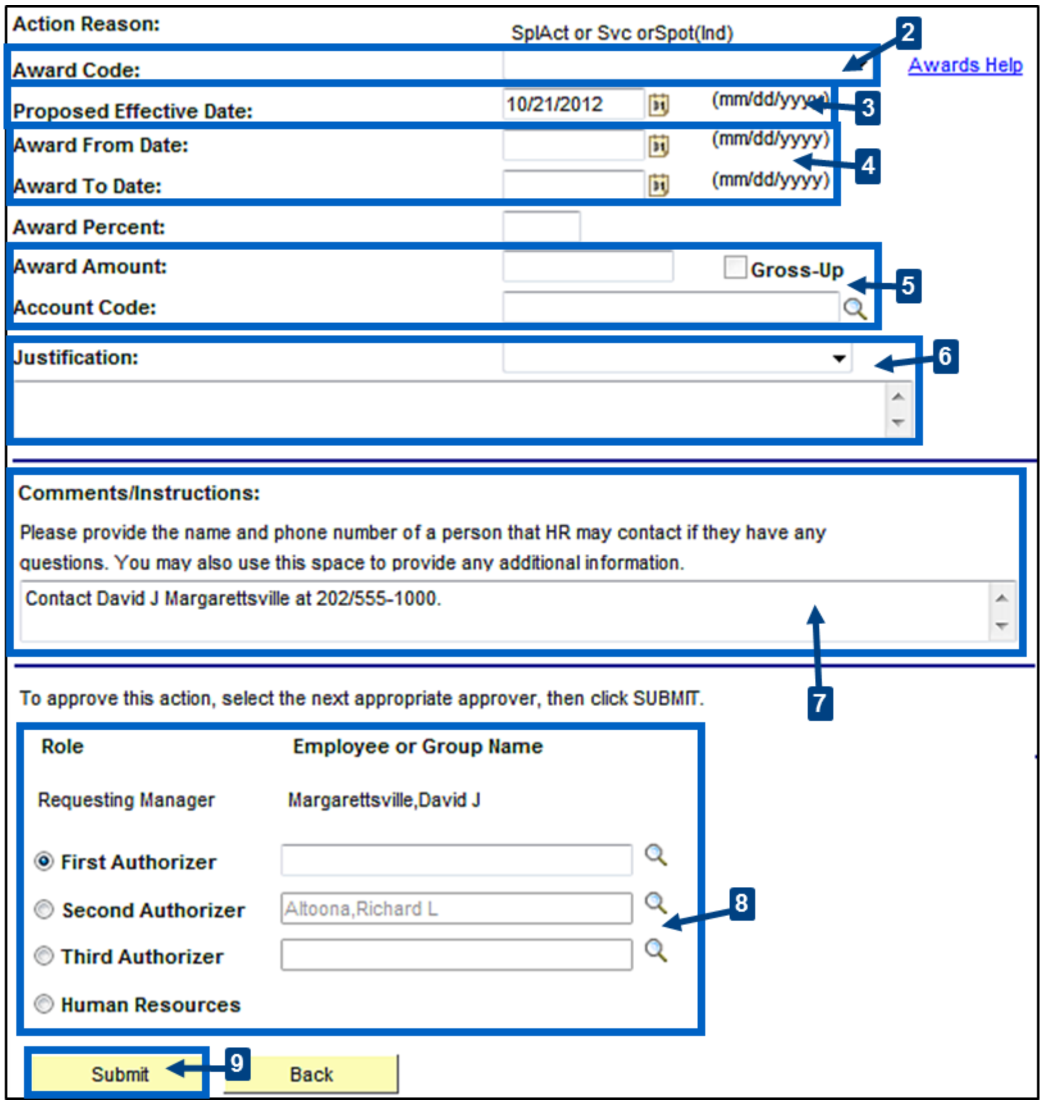
To initiate, authorize, and process a monetary or non-monetary Award action:

Initiating a Cash Award in MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Individual Cash Award**, **Foreign Language (Law Enforcement)**, or **Travel Savings Incentive (Gainsharing)** link.
2. (Individual Cash Award and Travel Savings Incentive Only): On the **Individual Cash Award** or **Travel Savings Incentive** page, select the appropriate **Award Code**.
3. Enter or verify the **Proposed Effective Date**.
4. Enter or select the **Award From** and **Award To Dates**.
5. Enter the **Award Amount** and **Account Code** (as applicable)**.**
6. Select the **Justification** for the award in the dropdown menu and, if necessary, provide further information in the textbox provided.

7. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
8. Enter or lookup the appropriate **Authorizer**.
9. Select the **Submit** button.



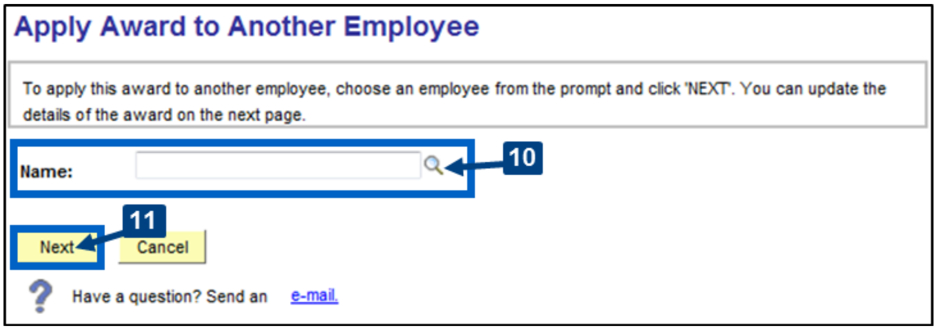
Chapter 13 Figure 230: Individual Cash Award Page

10. In the **Do you want to apply this award to another employee?** confirmation message, select the **Yes** button to award another employee or select the **No** button to return to your Home Page.

Note: Selecting the **No** button will open a confirmation message. Select the **OK** button in the confirmation message to return to your Home Page.

11. (If you selected Yes): On the **Apply Award to Another Employee** page, enter or lookup an employee **Name**.

12. (If you selected Yes): Select the **Next** button. (Repeat **Steps 2-10** as necessary.)

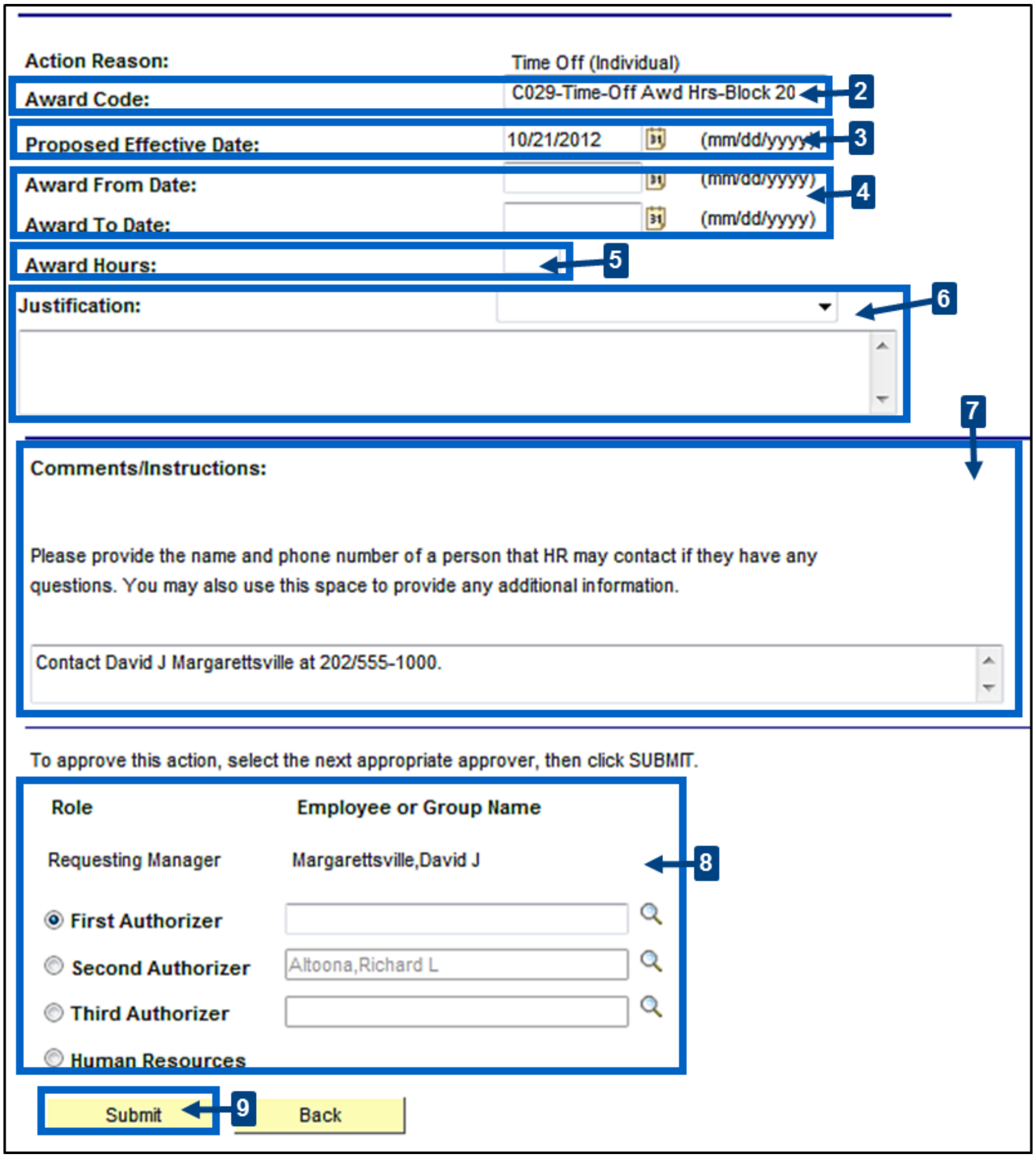


Chapter 13 Figure 231: Apply Award To Another Employee Page

Initiating an Individual Time Off Award in MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Individual Time Off Award** link.
2. On the **Individual Time Off Award** page, select the appropriate **Award Code**.
3. Enter or verify the **Proposed Effective Date**.
4. Enter or select the **Award From** and **To Dates**.
5. Enter the **Award Hours**.
6. Select the **Justification** for the award in the dropdown menu and, if necessary, provide further information in the textbox provided.
7. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
8. Enter or lookup the appropriate **Authorizer**.
9. Select the **Submit** button.



Chapter 13 Figure 232: Time Off Award Page

10. In the **Do you want to apply this award to another employee?** confirmation message, select the **Yes** button to award another employee or select the **No** button to return to your Home Page.

> **Note:** Selecting the **No** button will open a confirmation message. Select the **OK** button in the confirmation message to return to your Home Page.

11. (If you selected Yes): On the **Apply Award to Another Employee** page, enter or lookup an employee **Name**.
12. (If you selected Yes): Select the **Next** button. (Repeat **Steps 2-10** as necessary.)

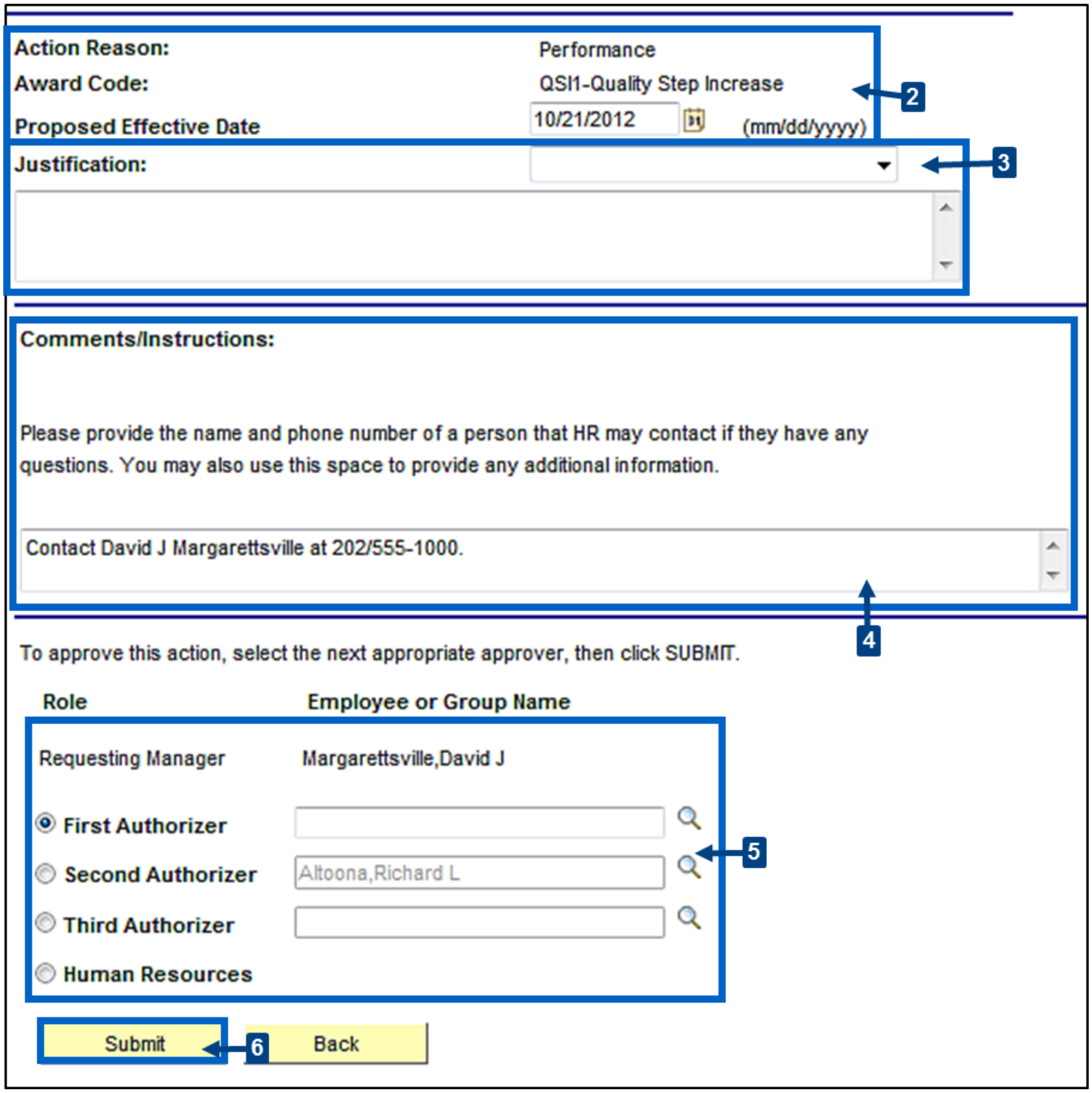
Initiating a Quality Step Increase in MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Quality Step Increase** link.

Note: The following message will display: Effective date must be at least 52 weeks since the employee was last granted a QSI. Select **OK** to continue.

2. On the **Quality Step Increase** page, enter or verify the that the **Action Reason** is **Performance**, the **Award Code** is **QSI1**, & the **Proposed Effective Date**.
3. Select the **Justification** for the award in the dropdown menu and, if necessary, provide further information in the textbox provided.
4. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
5. Enter or lookup the appropriate **Authorizer**.
6. Select the **Submit** button.



Chapter 13 Figure 233: Quality Step Increase Page

7. In the **Do you want to apply this award to another employee?** confirmation message, select the **Yes** button to award another employee or select the **No** button to return to your Home Page.

Note: Selecting the **No** button will open a confirmation message. Select the **OK** button in the confirmation message to return to your Home Page.

8. (If you selected Yes): On the **Apply Award to Another Employee** page, enter or lookup an employee **Name**.
9. (If you selected Yes): Select the **Next** button. (Repeat **Steps 2-7** as necessary.)

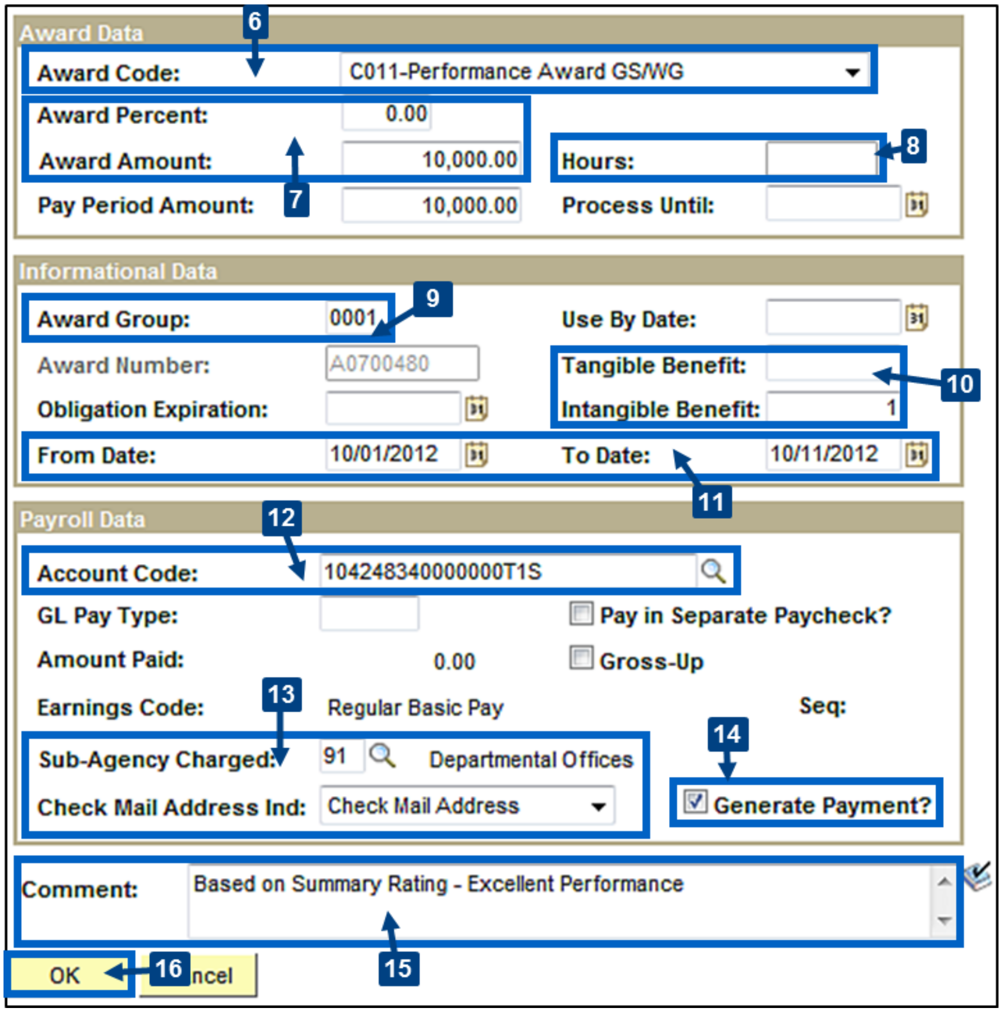
Authorizing & Processing of Awards in HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control tab***

OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control tab***

1. Verify the **Actual Effective Date**.
2. Enter or lookup the appropriate **PAR Status**.
3. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Select the **Award Data** link.
6. On the **Award Data** page, verify the **Award Code**.
7. (Cash Award Only): Verify the **Award Percent** and **Award Amount**.
8. (Time Off Award Only): Verify the awarded **Hours**.
9. Verify the number of employee's receiving the award in the **Award Group** field.
10. Enter or verify the **Tangible** and **Intangible Benefits**.
11. Verify the start (**From Date**) and end date (**To Date**) for the time period for which the employee was awarded.
12. Verify the appropriate **Account Code**.
13. Verify the **Sub-Agency Charged** and the address the payment will be sent to in the **Check Mail Address Ind** (Check Mail Address Indicator) dropdown menu.
14. Verify whether or not your organization will be generating payment in the **Generate Payment** checkbox.
15. (Optional): Enter the reason for the reward in the **Comment** field.
16. Select the **OK** button.



Chapter 13 Figure 234: Award Data Page

17. (Quality Step Increase Only): Select the **Compensation Data** tab.
18. (Quality Step Increase Only): On the **Compensation Data** tab, verify the **Step**.
19. Select the **Save** button.
20. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
21. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Compensation Data** tab).

Mass Awards

Overview

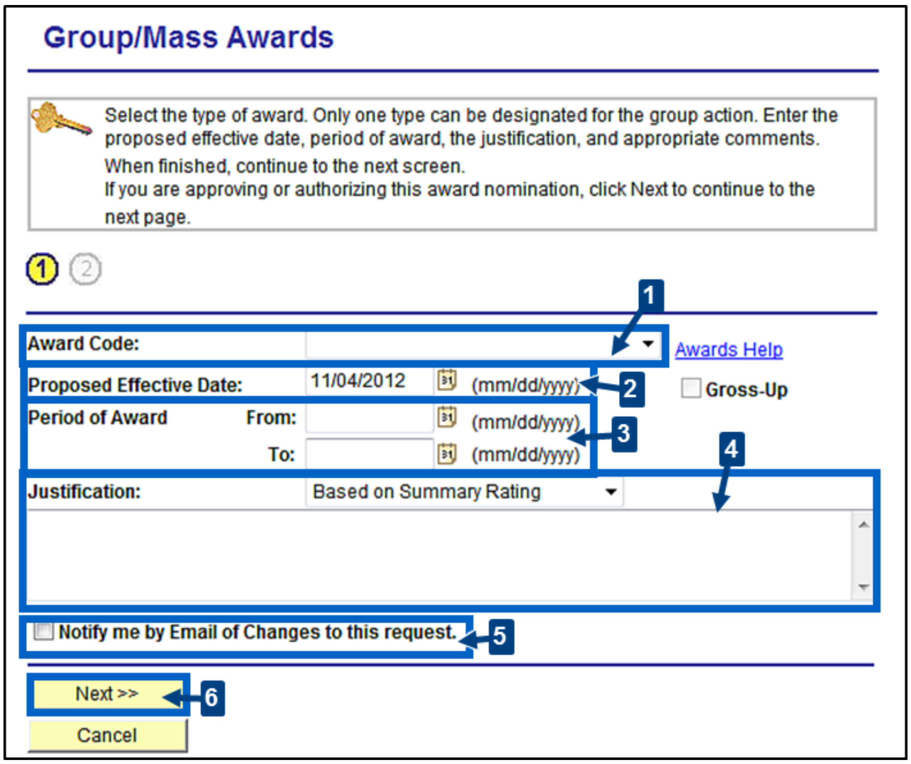
In addition to initiating Individual Awards, HR Connect includes functionality for MSS users to apply Mass Awards to select groups of individuals. A Mass Award is one which can be applied to multiple people or groups. Mass Awards may be applied to your direct reports, your immediate organization, or a selection of individuals within your organization.

The availability of Mass Actions, and the procedure for processing Mass Awards, may vary across organizations. This section will provide steps for initiating a Mass Award and an overview of Mass Award processing.

INITIATING A MASS AWARD IN MSS

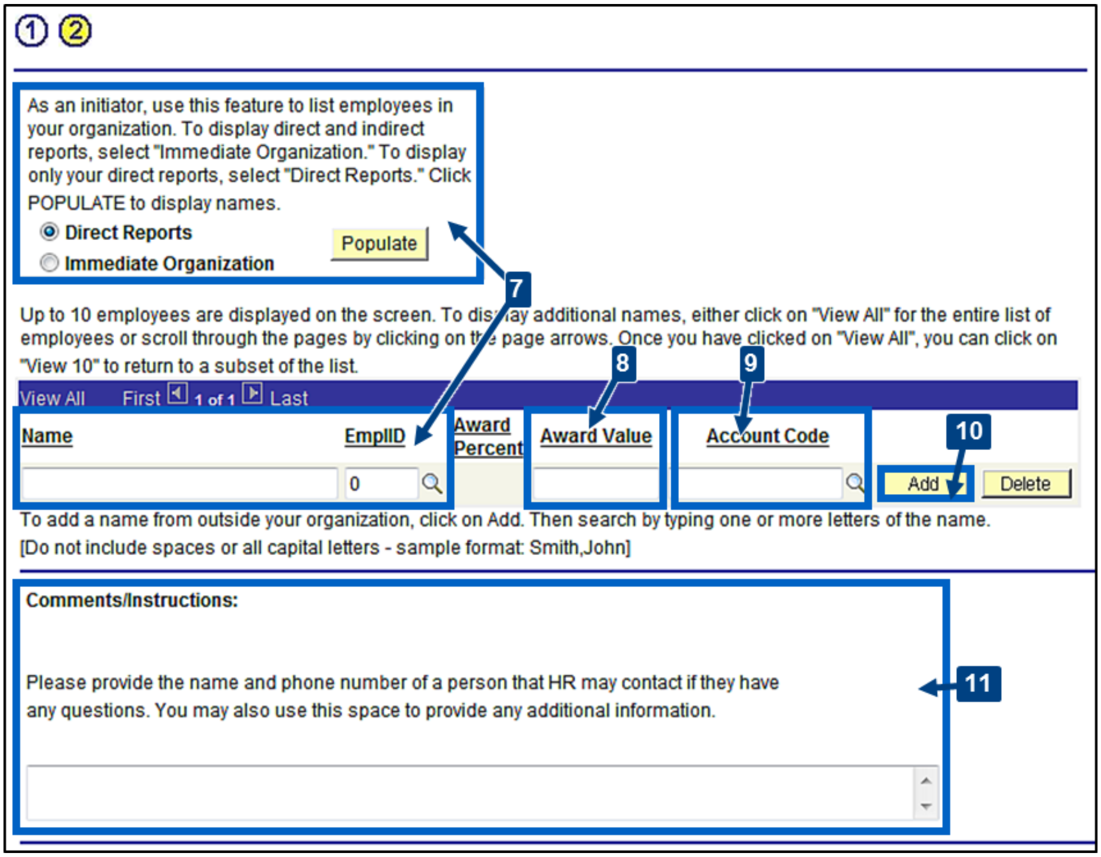
Manager tab>Mass Actions pagelet>Mass Awards link>Group/Mass Awards page

1. Select the appropriate **Award Code**.
2. Enter or select the **Proposed Effective Date**.
3. Enter or select the **Period of Award** dates.
4. Select the **Justification** and enter any additional comments as needed.
5. (Optional):Select the **Notify me by Email** checkbox.
6. Select the **Next>>** button.



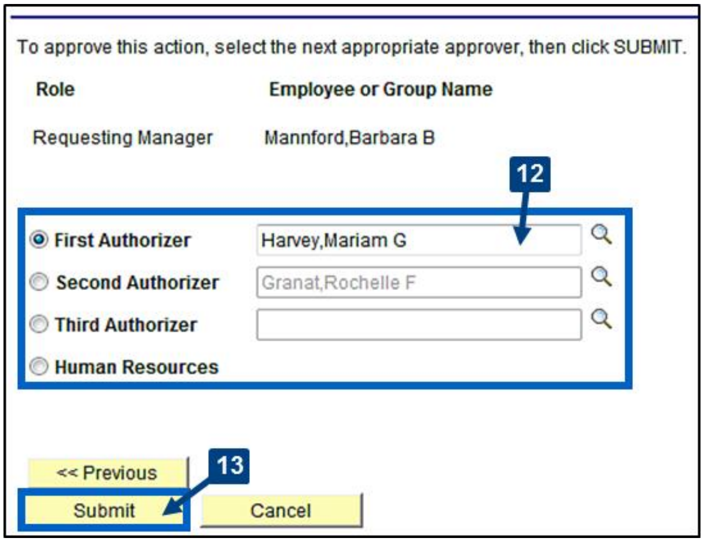
Chapter 13 Figure 235: Group/Mass Awards Form - Page 1

7. On the second **Award** page, enter or lookup the employees to be awarded. (You may automatically populate the list by selecting **Direct Reports** or **Immediate Organization** and selecting the **Populate** button.)
8. Enter the **Award** value. (the Award value can be in hours or dollars, depending on the award type chosen.)
9. (If a cash award): Enter or lookup the appropriate **Account Code**.
10. (To add more employees): Select the **Add** button.
11. (Optional): Enter the name and phone number of an individual who may be contacted by HR concerning the Mass Award in the **Comments/Instructions** field.



Chapter 13 Figure 236: Group/Mass Awards Form - Page 2

12. Enter or lookup the appropriate **Authorizer**.
13. Select the **Submit** button. (This will take you back to your Home Page.)



Chapter 13 Figure 237: Mass Awards Routing Pagelet

Authorizing & Processing a Mass Award in HRSS

As mentioned previously, the steps for processing a Mass Award may vary across organizations. In order to maintain an accurate employee's record, HR Connect provides two options:

The first option is to bypass HR Processing entirely.

- Rather than route Mass Awards to an HRSS user for processing, the action is instead transmitted directly to the NFC from the final MSS authorizer.

The second option is to process Group Awards individually for each awardee.

- Prior to routing, a Bureau Maintenance user must create a Mass Authorizer worklist.
- Once routed to Human Resources, the Mass Award will appear in the Mass Authorizer worklist.
- The Mass Authorizer will then authorize and process each award individually. The specific steps for processing Mass Awards individually are the same as those shown above for processing Individual Awards.

13.4 CHANGE IN DUTY LOCATION

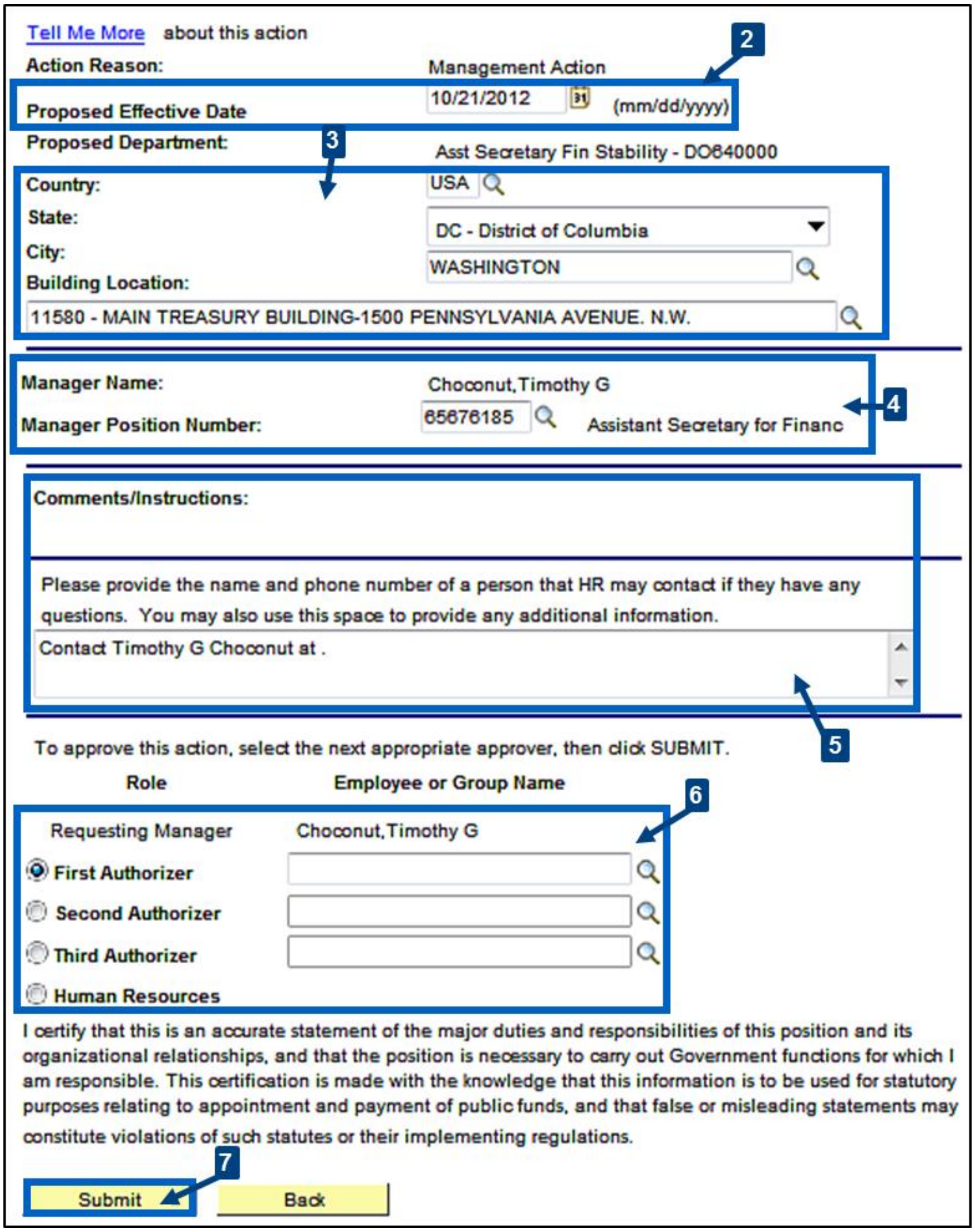
A Change in Duty Location action is performed when an employee's office location changes without any change to their department or position. A Change in Duty Location action is initiated via MSS, and then requires authorization and processing by an HRSS user.

To initiate, authorize, and process a Change in Duty Location:

INITIATING A CHANGE IN DUTY LOCATION IN MSS

Manager Tab>People and Positions pagelet>Employee Name link>Personnel Actions page

1. Select the **Change in Duty Location** link.
2. On the **Change in Duty Location** page, enter or select the **Proposed Effective Date**.
3. Enter or select the change in location information (i.e., **Country**, **State**, **City**, and **Building Location**).
4. Enter or verify the **Manager Position Number**.
5. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** who can be contacted for this action (e.g., your name).
6. Enter or lookup the appropriate **Authorizer**.
7. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 238: Change In Duty Location Page

Authorizing & Processing a Change In Duty Location in HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control page***

OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control page***

1. Enter or select the **Actual Effective Date**.
2. Enter or lookup the appropriate **PAR Status**.
3. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

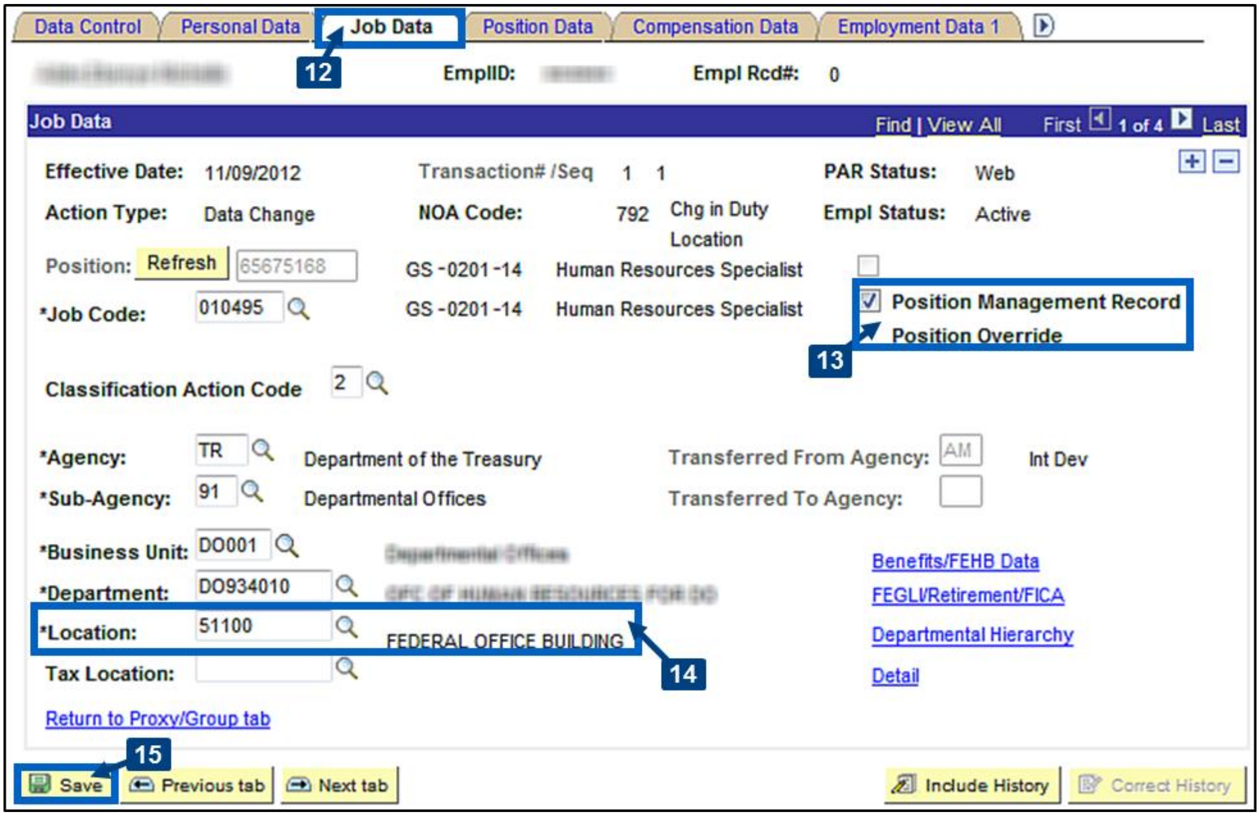
> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select the **Job Data** tab.
11. (Optional): On the **Job Data** tab, select **Position Management Record** Position **Override** checkbox.

> **Note:** The **Position Management Record Position Override** checkbox is not available to all iindividuals.

12. Enter or verify the change in **Location**.

13. Select the **Save** button.



Chapter 13 Figure 239: Job Data Tab – Change In Duty Location

14. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.

15. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Job Data** tab).

13.5 Change In Work Schedule/Hours

Overview

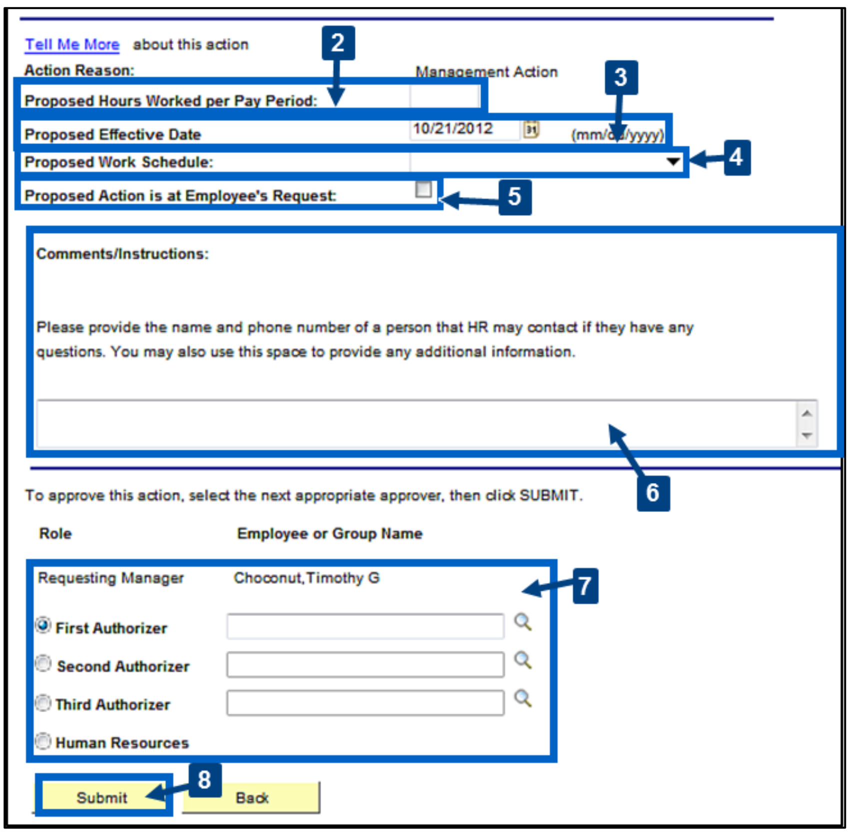
A Change in Work Schedule action is one in which an employee's work schedule, and/or work days per pay period are modified. A Change in Hours is an action in which an employee's work hours are modified. These actions may both be initiated via MSS or HRSS, and require authorization and processing via HRSS.

To initiate, process, and authorize a Change in Work Schedule or Change in Hours action:

Initiating a Change in Work Schedule/Hours in MSS

Manager Tab>People and Positions pagelet>Employee Name link>Personnel Actions page

1. Select the **Change in Work Schedule** or **Change in Hours** link.
2. (For a Change in Hours): From the appropriate page, enter the **Proposed Hours Worked per Pay Period**.
3. Enter or select the **Proposed Effective Date**.
4. (For a Change in Work Schedule):From the appropriate page, select the appropriate **Proposed Work Schedule**.
5. (Optional): If appropriate, select **Proposed Action is at Employee's Request** checkbox.
6. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** who can be contacted for this action (e.g., your name).
7. Enter or lookup the desired **Authorizer**.
8. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 240: Change In Work Schedule Page

Authorizing & Processing a Change in Hours /Work Schedule in HRSS

Individual Worklist: *HR tab>Worklist pagelet>Personnel Action link>Data Control page*

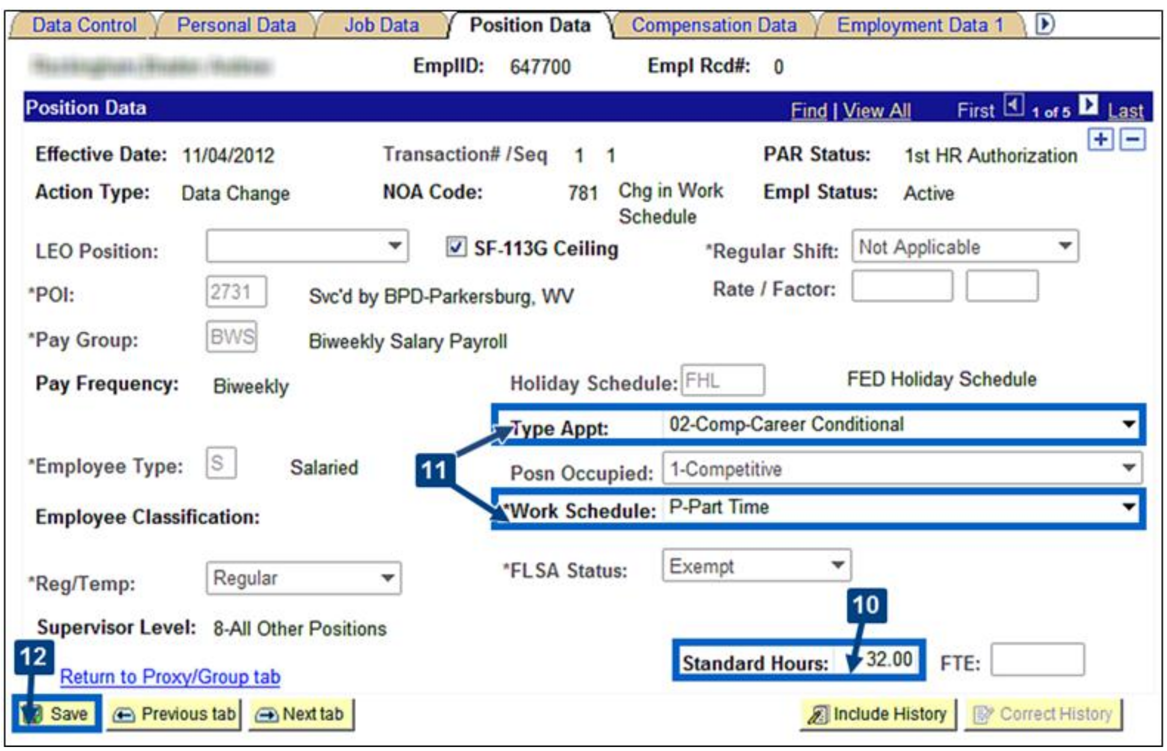
OR

Group Worklist: *Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control page*

1. Verify the **Actual Effective Date**.
2. Enter or lookup the appropriate **PAR Status**.
3. (If Par Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the appropriate **Authority** code.
6. Enter or lookup the appropriate **Remark CD**.
7. Enter any necessary information in the remark rows.

> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 6-7 as necessary. To remove a remark select the remove row (**-**) button.

8. Select the **OK** button.
9. Select the **Position Data** tab.
10. (For Change in Hours): Verify that the hours in the **Standard Hours** field are correct.
11. (For Change in Work Schedule): Verify that the **Type Appt** & **Work Schedule** selections are correct.
12. Select the **Save** button.



Chapter 13 Figure 241: Position Data Tab- Change In Work Schedule/Change In Hours

13. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
14. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Position Data** tab).

13.6 CHANGE TO LOWER GRADE

OVERVIEW

A Change to Lower Grade action is one in which an employee is transferred to a position with a lower rate of base pay. This action may be initiated by an MSS or HRSS user, but requires processing by an HRSS user.

To initiate, authorize, and process a Change to Lower Grade:

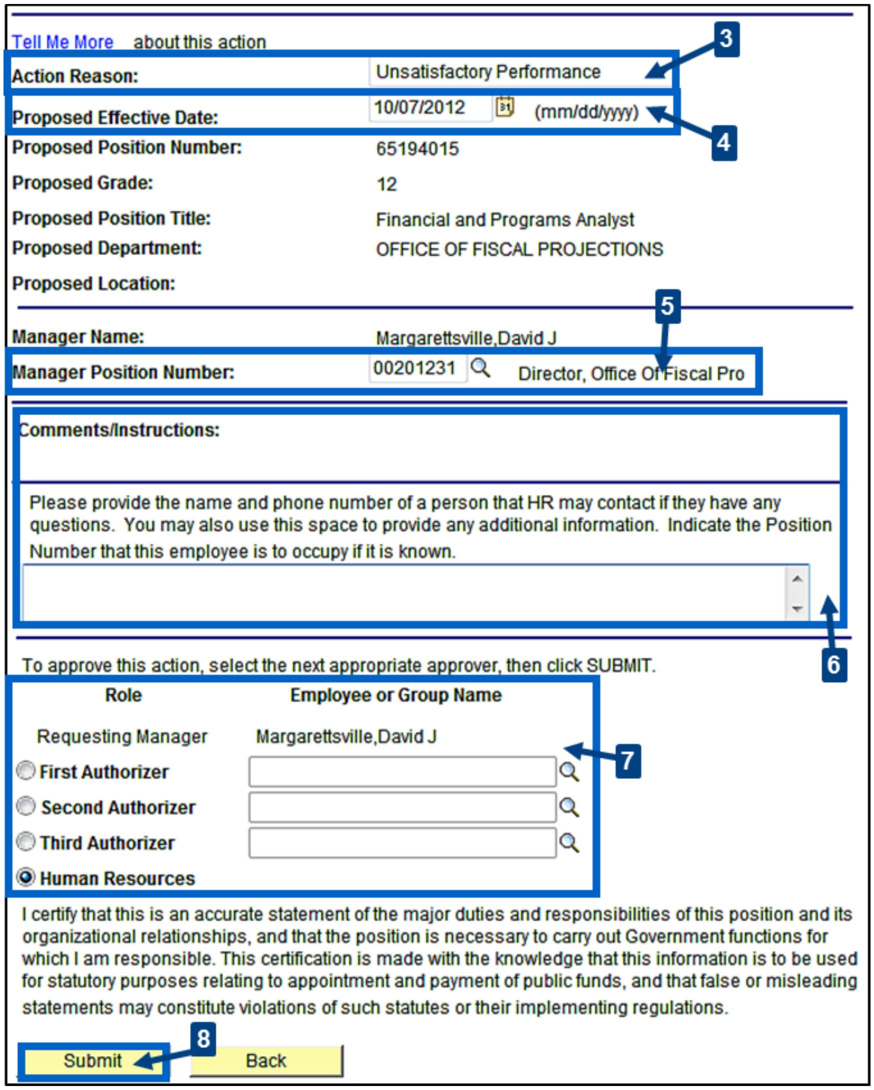
INITIATING A CHANGE TO A LOWER GRADEIN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Change to Lower Grade** link.
2. From the Personnel Actions- Vacant Positions page, select the desired **Position #** link.

> **Note:** If the position that you need is not listed, then select the **here** link (below the list), & search for the desired position from the Position Description- Search page.

3. From the **Change to Lower Grade** page, select the **Action Reason**.
4. Enter or select the **Proposed Effective Date**.
5. Enter or lookup the **Manager Position Number**.
6. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
7. Enter or lookup the appropriate **Authorizer**.
8. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 242: Change To Lower Grade Page

AUTHORIZING & PROCESSING A CHANGE TO A LOWER GRADE IN HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control tab***

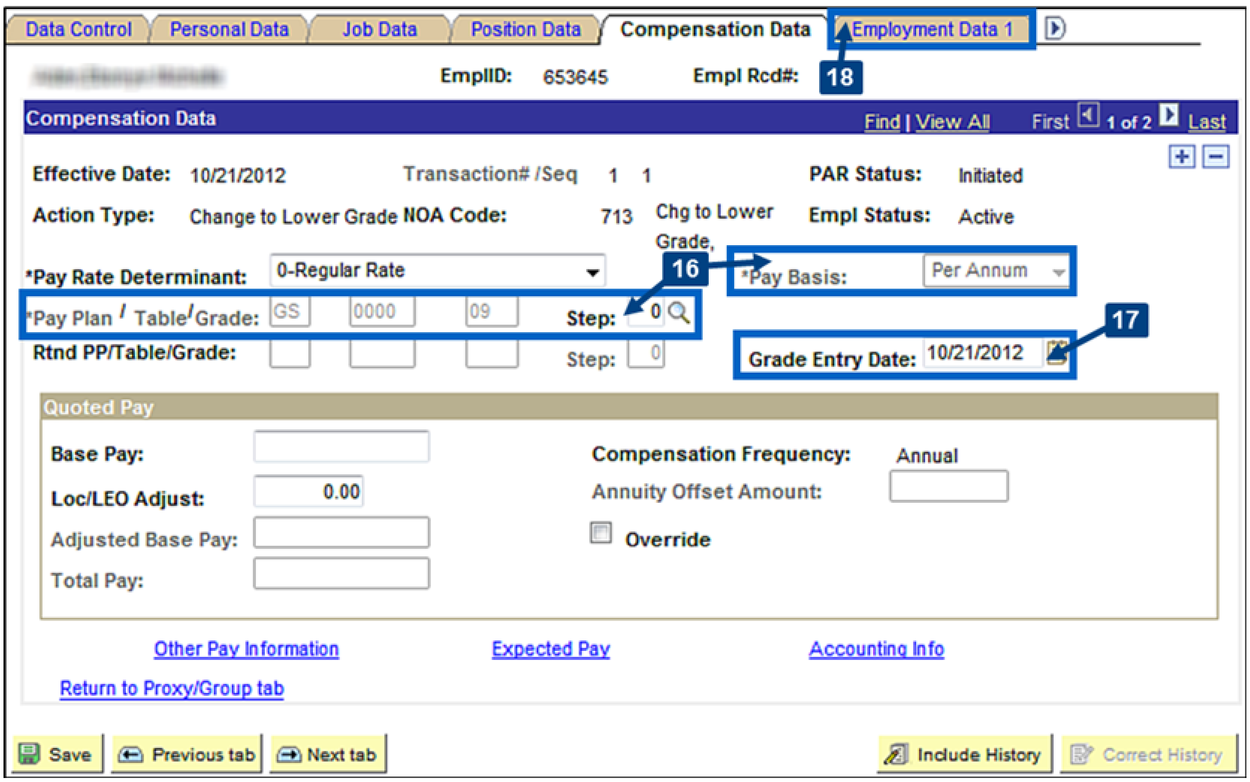
OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control tab***

1. Enter or select the **Actual Effective Date**.
2. Enter or lookup the appropriate **PAR Status**.
3. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

> **Note:** For additional remarks, select the add row (**+**) button & repeat Steps 7-8 as necessary. To remove a remark select the Remove Row (**-**) button.

9. Select the **OK** button.
10. Select the **Job Data** tab.
11. On the **Job Data** tab, verify the position information.
12. Enter or verify that the **Classification Action Code**.
13. Select the **Position Data** tab.
14. On the **Position Data** tab, verify the position information.
15. Select the **Compensation Data** tab.
16. On the **Compensation Data** tab, enter or verify the **Pay Basis**, **Pay Plan/Table/Grade**, and **Step**.
17. Enter or verify the **Grade Entry Date**.
18. Select the **Employment Data 1** tab.



Chapter 13 Figure 243: Compensation Data Tab – Change To Lower Grade

19. On the **Employment Data 1** tab, enter or verify the **Next Review Dt** and **LEI Date**.
20. Select the **Save** button.
21. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
22. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Employment Data 1** tab).

13.7 Conversion

A Conversion action is one in which an employee's appointment is changed either as a result of an employee or manager request, position reorganization, or job reclassification. A conversion action may be initiated via MSS, but requires processing by an HRSS user.

To initiate, authorize, and process a Conversion:

Initiating a Conversion in MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

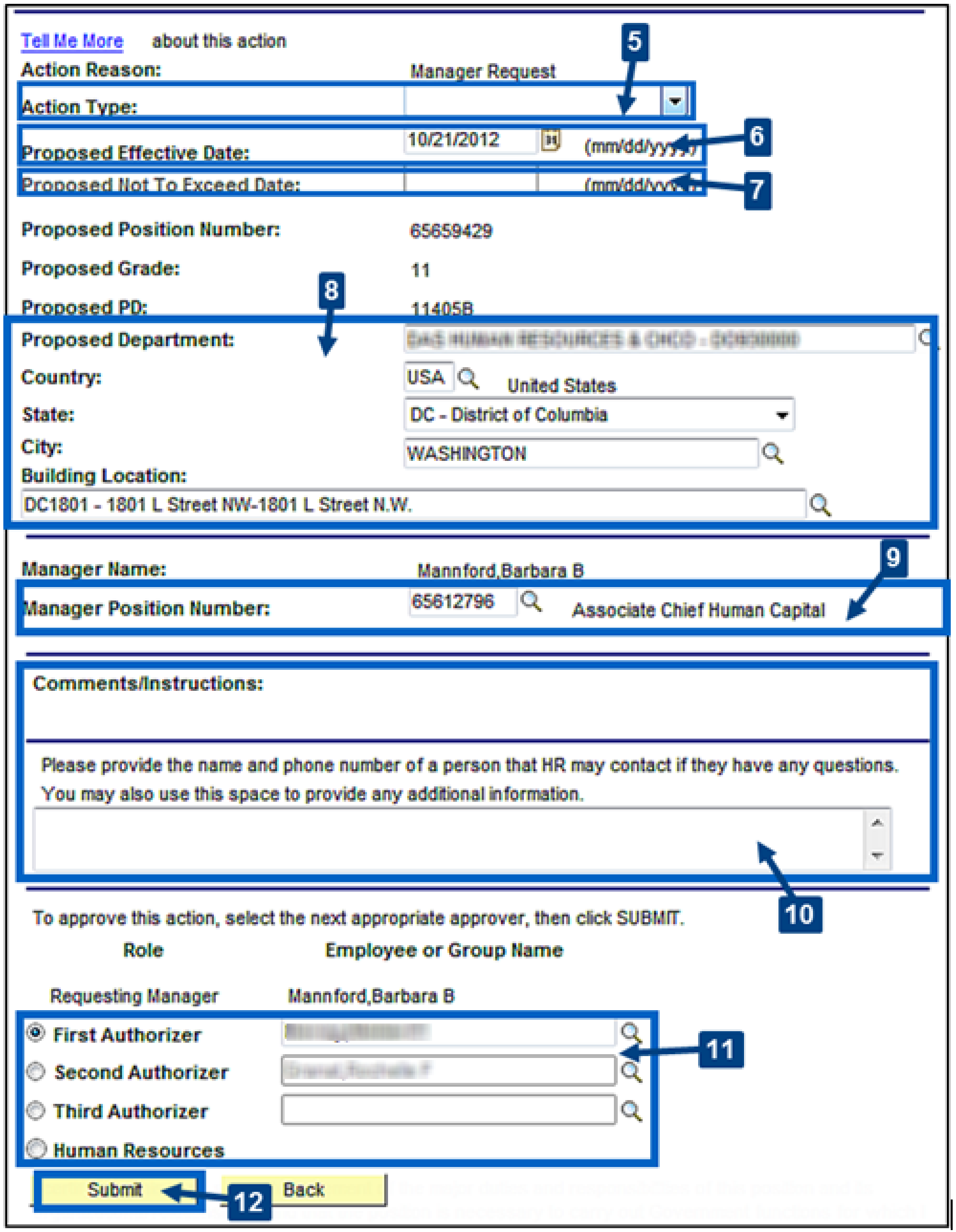
1. Select the **Conversions** link.
2. From the **Position Description - Search** page, enter the relevant search criteria.

> **Note:** If the employee's duties & responsibilities have not changed, select the **click here** link and skip to Step 5.

3. Select the **Search** button.
4. Select the desired **Position #** link.

> **Note:** If the employee is to remain in the same position, select the **Click Here** link, to the right of If employee's duties & responsibilities have not changed.

5. From the **Conversions** page, select the **Action Type**.
6. Enter or select the **Proposed Effective Date**.
7. (If you selected an NTE Action Type): Enter or select the **NTE date**.
8. Enter or lookup the **Proposed Department** and work location (i.e., **Country**, **State**, **City**, & **Building Location**.)
9. Enter or verify the **Manager Position Number**.
10. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted about this action (e.g., your name).
11. Enter or lookup the appropriate **Authorizer**.
12. Select the **Submit** button. (A confirmation message will display and you will be directed to your Home Page.)



Chapter 13 Figure 244: Conversion Request Form - MSS

AUTHORIZING & PROCESSING A CONVERSION IN HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control page***

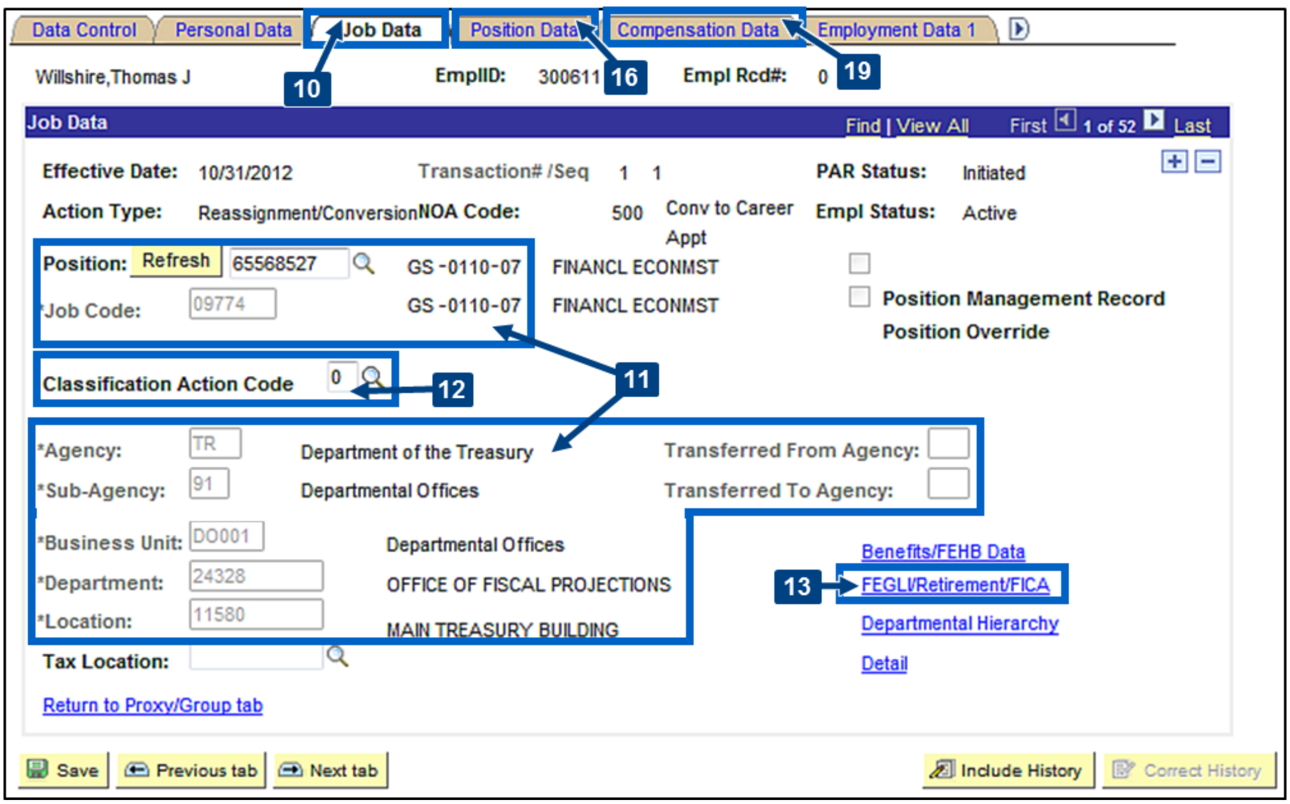
OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control page***

1. Verify the **Actual Effective Date**.
2. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
3. Select or enter the appropriate **PAR Status**.
4. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

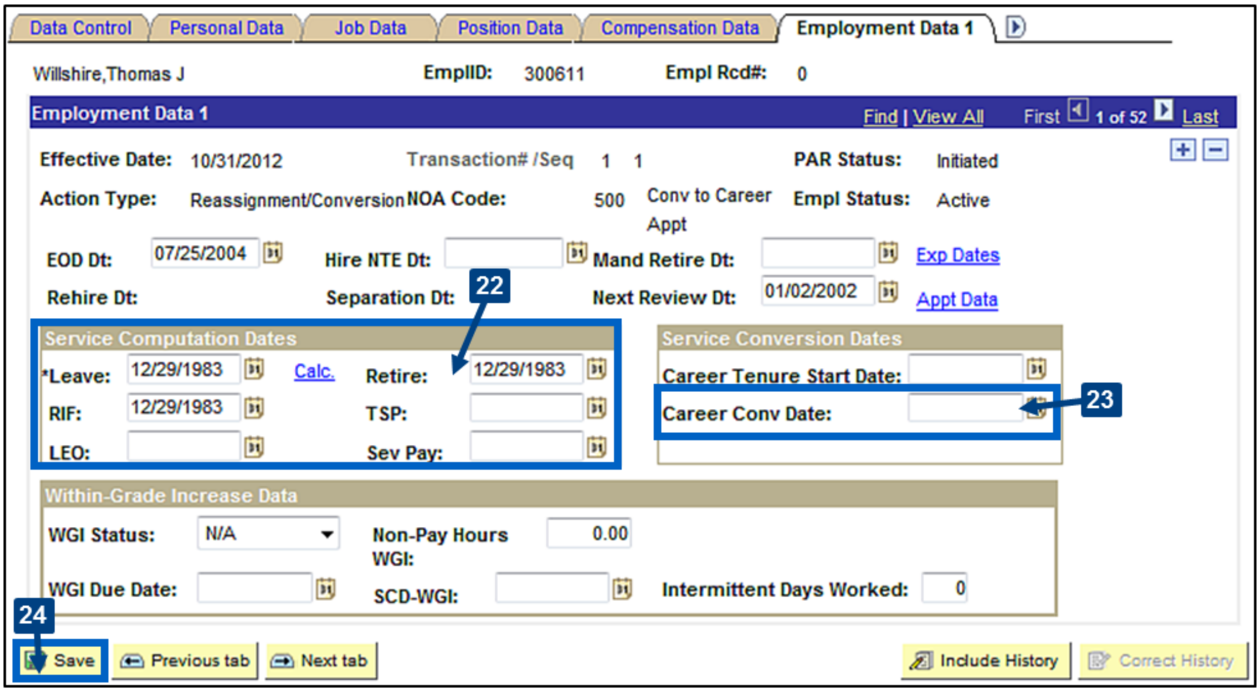
> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select the **Job Data** tab.
11. On the **Job Data** tab, verify the position information.
12. Enter or verify that the **Classification Action Code**.
13. Select the **FEGLI/Retirement/FICA** link.
14. On the **FEGLI/Retirement Data/FICA** page, verify the **FEGLI Code**, **FERS Coverage**, **Previous Retirement Coverage**, and **Annuitant Indicator**.
15. Select the **OK** button.
16. Select the **Position Data** tab.
17. On the **Position Data** tab, verify the position information.
18. Select the appropriate **Type of Appt** (Appointment).
19. Select the **Compensation Data** tab.



Chapter 13 Figure 245: Job Data Tab – Conversion Action

20. On the **Compensation Data** tab, enter or verify the **Pay Rate Determinant**, **Step**, and **Grade Entry Date**.
21. Select the **Employment Data 1** tab.
22. On the **Employment Data 1** tab, enter or verify the **Service Computation Dates** (i.e., **Leave**, **RIF**, **LEO**, **Retire**, **TSP**, **Sev Pay**).
23. (Only if Tenure Code = 2): Enter or select the **Conv Begin Date**.
24. Select the **Save** button.



Chapter 13 Figure 246: Employment Data 1 Tab – Conversion Action

25. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
26. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Employment Data 1** tab).

13.8 Data Change Request (Personal)

Changes to an employee's personal data may be conducted via ESS and/or HRSS and may or may not require HR processing.

Changes to the majority of this information (e.g., education, address, etc.) do not require HR processing. These changes may be initiated in the **My Information** module of **ESS** and will take immediate effect.

Changes to the following personal data may be initiated via ESS but do require HR processing:

- Name Change
- Veterans Preference

Not all changes may be initiated in the Front End of HR Connect. Changes to the following data may only be performed manually in the Back End of HR Connect by an HRSS user:

- Health Benefits
- Federal Employees' Group Life Insurance (FEGLI)
- Retirement Plan
- Elected Living Benefits
- Tenure Group
- Service Computation Date
- Preliminary Disability Retirement

As all changes require the same general procedure, they will be presented as one walkthrough. Steps unique to a specific change (e.g., Name Change) will be marked accordingly.

Initiating a Data Change in HRSS

Menu tab>Back End Menu pagelet>Workforce Administration menu>Job Information link>HR1 Authorization link>HR1 Authorization page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. In the search results, select the desired employee.
4. On the **Data Control** page, select the add a row (**+**) button.
5. In the new data row, perform the steps outlined below in the **Authorizing & Processing a Data Change** section.

Authorizing & Processing a Data Change in HRSS

Individual Worklist: *HR tab>Worklist pagelet>Personnel Action link>Data Control Tab*

OR

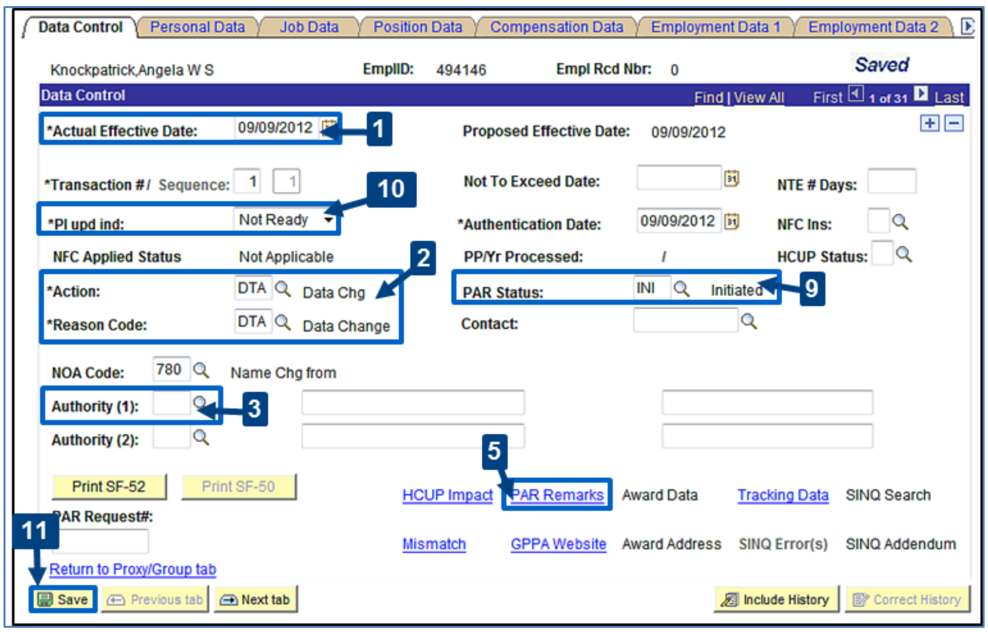
Group Worklist: *Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Worklist For Group page>Personnel Action link>Data Control tab*

1. Enter or verify the **Actual Effective Date**.
2. Enter or verify the **Action** and **Reason Code**.
3. Enter or lookup the legal authority code in the **Authority (1)** field.
4. Change or verify the necessary employee information. The following table identifies the data change (left column) and steps relating to that change (right column):

Change	Steps
a. Name	14-20
b. Veterans' Preference	14-20
c. Health Benefits	21-26
d. Federal Employees' Group Life Insurance (FEGLI)	27-34
e. Retirement Plan	27-34
f. Elected Living Benefits	27-34
g. Tenure Group	35-42
h. Service Computation Date	43-46

Chapter 13 Figure 247: Change Steps Chart

5. Select the **PAR Remarks** link.
6. Enter or lookup the appropriate **Remark CD**.
7. Enter any necessary information in the remark rows. (For additional Remarks, select the add row (**+**) button & repeat **Steps 5-6** as necessary. To remove a remark select the remove row (**-**) button.)
8. Select the **OK** button.
9. On the **Data Control** tab, enter or lookup the appropriate **PAR Status**.
10. (HR Processor Only): In the **PI upd ind** dropdown menu, select **Ready**.
11. Select the **Save** button.



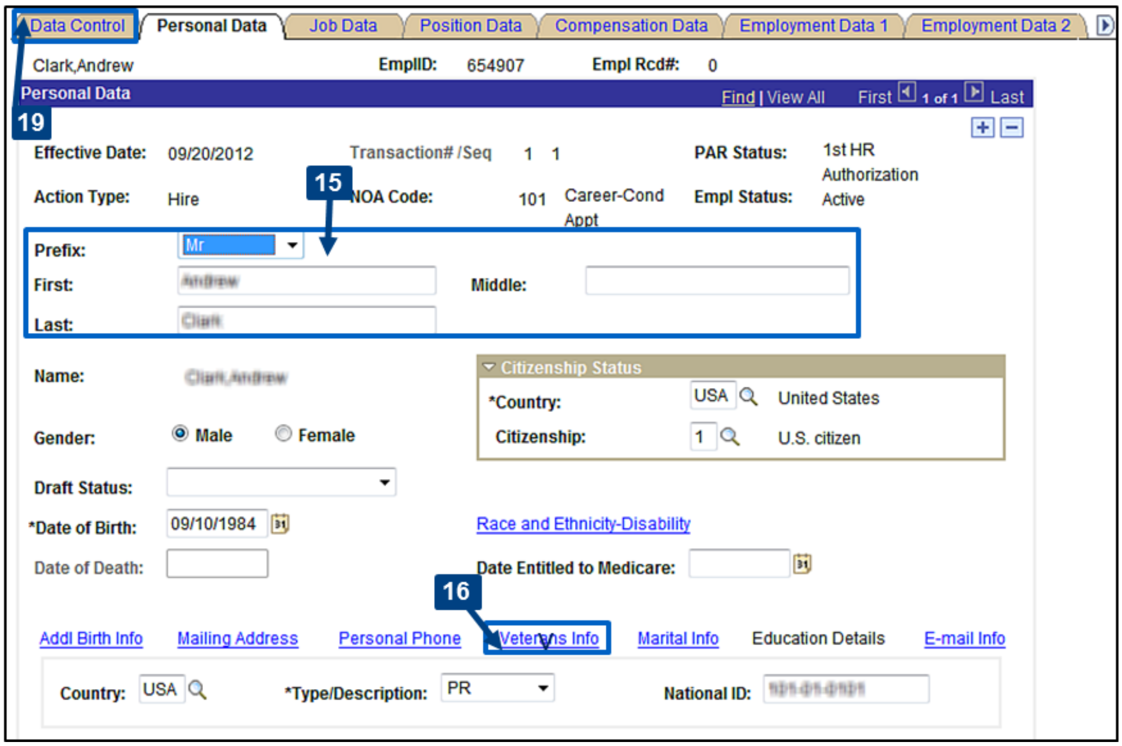
Chapter 13 Figure 248: Data Control Tab – Data Change

12. (HR Authorizer Only): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
13. (HR Authorizer Only): Select the **OK** button. (This will take you to the **Data Control** tab).

NAME CHANGE & VETERANS' PREFERENCE CHANGE

The following walkthrough provides the steps for processing changes to an employee's Name and Veterans Preference:

14. Select the **Personal Data** tab.
15. (Name Change Only): On the **Personal Data** tab, change or verify the employee's **Prefix**, **First**, **Middle**, and **Last** name.
16. (Veterans' Preference Change Only): Select the **Veterans Info** link.
17. (Veterans' Preference Change Only): On the Veterans Info page, change or verify the employee's Veterans Information (e.g., **Veterans Status**, **Creditable Military Service**, etc.).
18. (Veterans' Preference Change Only): Select the **OK** button.
19. Select the **Data Control** tab.



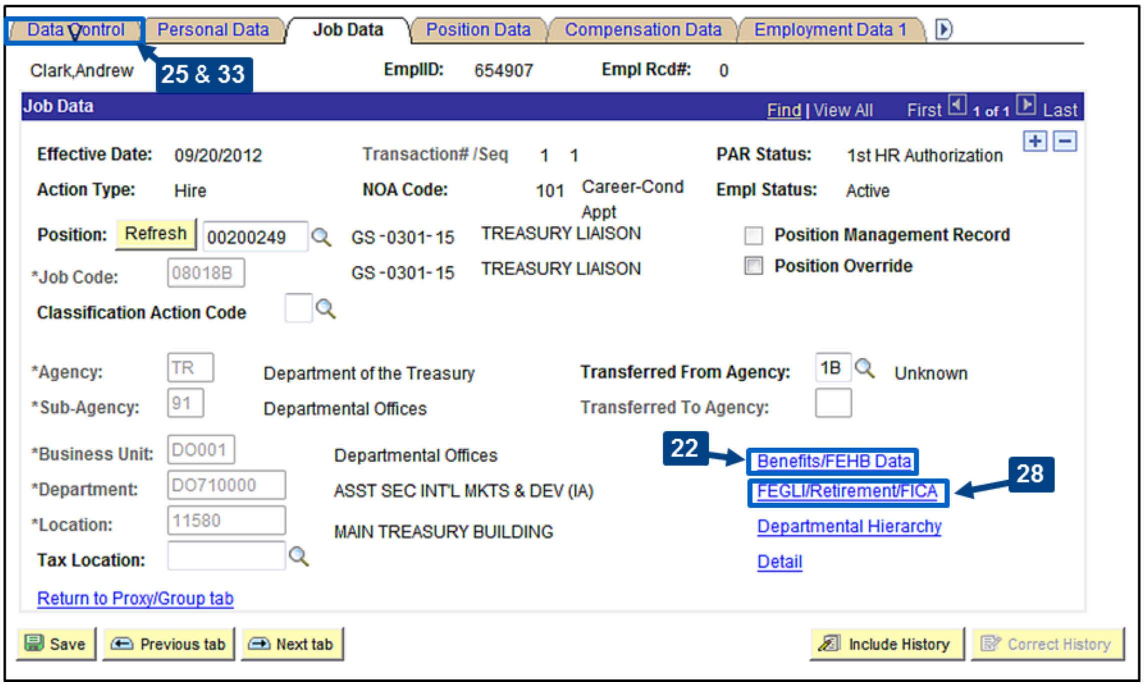
Chapter 13 Figure 249: Personal Data Tab – Change To Name & Veterans Preference

20. Return to **Step 5** to continue the process of authorizing or processing the action.

CHANGE IN BENEFITS

The following walkthrough provides the steps for initiating and processing changes to an employee's benefits:

21. Select the **Job Data** tab.
22. On the **Job Data** tab, select the **Benefits/FEHB** link.
23. On the **Benefits/FEHB Data** page, change the employee's **Benefits** and/or **FEHB** (Federal Employee Health Benefits) information.
24. Select the **OK** button.
25. Select the **Data Control** tab.



Chapter 13 Figure 250: Job Data Tab – Benefits Change

26. Return to **Step 5** to continue the process of authorizing or processing the action.

Change In FEGLI, Retirement Plan, and/or Elected Living Benefits

The following walkthrough provides the steps for initiating and processing changes to an employee's FEGLI, Retirement Plan, or Elected Living Benefits:

27. Select the **Job Data** tab.
28. On the **Job Data** tab, select the **FEGLI/Retirement/FICA** link.
29. (FEGLI Change Only): Change the employee's **FEGLI** code.
30. (Retirement Plan Change Only): Change the employee's **Retirement Plan**, **FERS Coverage**, and/or **Previous Retirement Coverage**.
31. (Elected Living Benefits Change Only): Change the employee's **Living Benefits** and/or **Coverage Amount**.
32. Select the **OK** button.
33. Select the **Data Control** tab.
34. Return to **Step 5** to continue the process of authorizing or processing the action.

Change In Tenure

The following walkthrough provides the steps for initiating and processing changes to an employee's Tenure status:

35. Select the **Position Data** tab.
36. On the **Position Data** tab, select the employee's new appointment from the **Type Appt.** dropdown menu.
37. Select the **Employment Data 2** tab.
38. On the **Employment Data 2** tab, select the employee's new **Tenure**.
39. Select the **Employment Data 1** tab.
40. On the Employment Data 1 tab, clear the **Conv Begin Date**, **Career Conv Date**, and **Career-Cond Conv Date** fields.
41. Select the **Data Control** tab.
42. Return to **Step 5** to continue the process of authorizing or processing the action.

Change In Service Computation Date

The following walkthrough provides the steps for initiating and processing changes to an employee's Service Computation Date (SCD):

43. Select the **Employment Data 1** tab.
44. On the **Employment Data 1** tab, change the date in the **Leave**, **Retire**, **RIF** (Reduction In Force), **TSP** (Thrift Savings Plan), or **Sev Pay** (Severance Pay) fields.
45. Select the **Data Control** tab.
46. Return to **Step 5** to continue the process of authorizing or processing the action.

13.9 Detail

Overview

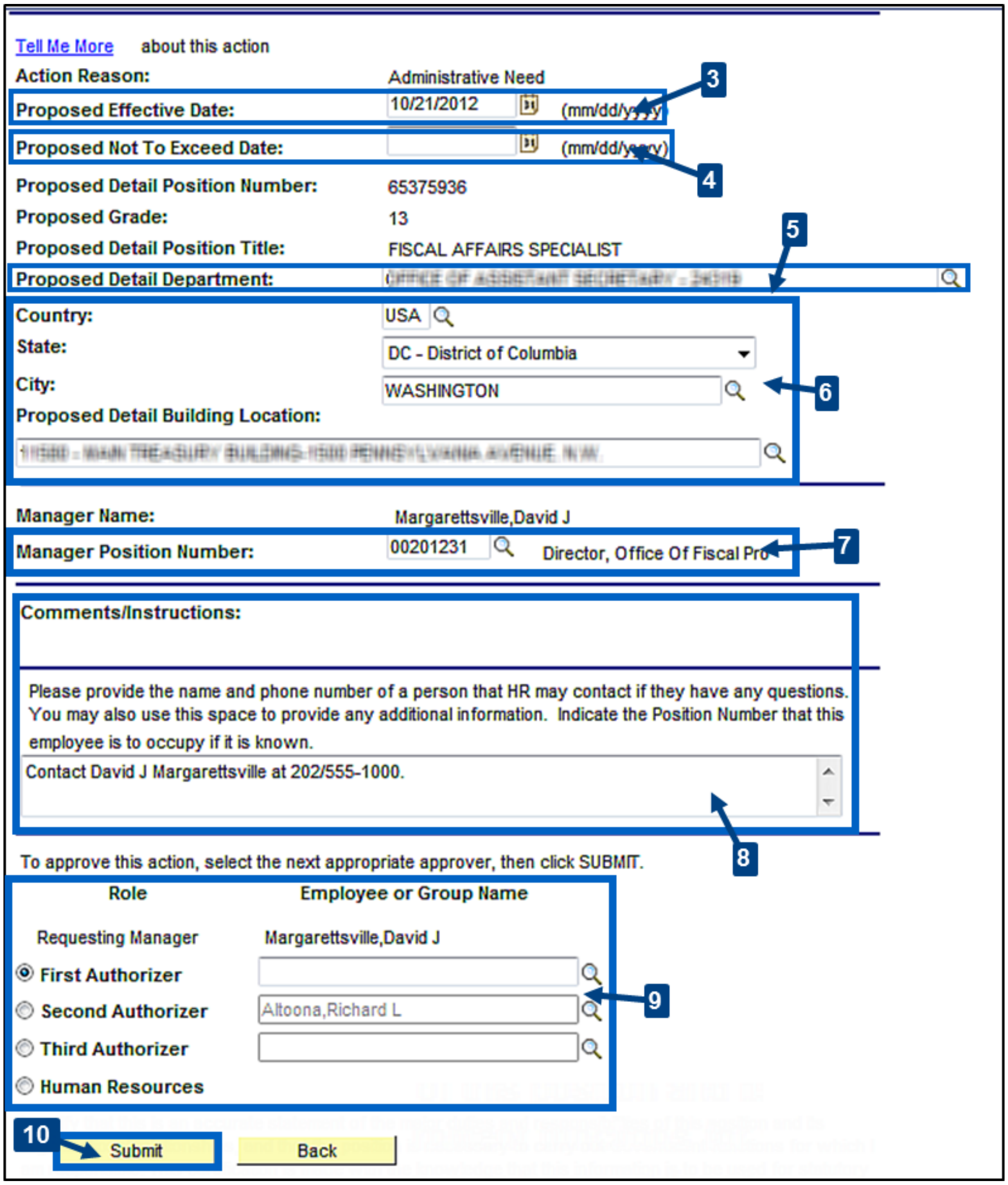
A Detail action is performed when an employee is temporarily transferred to another department. This action may be initiated by an MSS or HRSS user, but requires processing by an HRSS user.

To initiate, authorize, and process a Detail action:

Initiating a Detail in MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Detail** link.
2. From the **Personnel Actions- Vacant Positions** page, select the desired **Position #** link.
3. From the **Detail** page, enter or select the **Proposed Effective Date**.
4. Enter or select the **Proposed Not To Exceed Date**.
5. Enter or verify the **Proposed Detail Department**.
6. Enter or verify the **Manager Position Number**.
7. Enter or verify the proposed detail address (i.e., **Country**, **State**, **City**, and **Proposed Detail Building Location**.)
8. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
9. Enter or lookup the appropriate **Authorizer**.
10. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)


Tell Me More about this action

Action Reason: Administrative Need

Proposed Effective Date: 10/21/2012 (mm/dd/yyyy) 3

Proposed Not To Exceed Date: (mm/dd/yyyy) 4

Proposed Detail Position Number: 65375936

Proposed Grade: 13

Proposed Detail Position Title: FISCAL AFFAIRS SPECIALIST

5

Proposed Detail Department:

Country: USA

State: DC - District of Columbia

City: WASHINGTON 6

Proposed Detail Building Location:

Manager Name: Margarettsville,David J

Manager Position Number: 00201231 Director, Office Of Fiscal Pro 7

Comments/Instructions:

Please provide the name and phone number of a person that HR may contact if they have any questions. You may also use this space to provide any additional information. Indicate the Position Number that this employee is to occupy if it is known.

Contact David J Margarettsville at 202/555-1000.

8

To approve this action, select the next appropriate approver, then click SUBMIT.

Role	Employee or Group Name
Requesting Manager	Margarettsville,David J
First Authorizer	
Second Authorizer	Altoona,Richard L
Third Authorizer	
Human Resources	

9

10 Submit Back

Chapter 13 Figure 251: Proposed Detail Request Form

AUTHORIZING & PROCESSING A DETAIL IN HRSS

Individual Worklist: *HR tab>Worklist pagelet>Personnel Action link>Data Control tab*

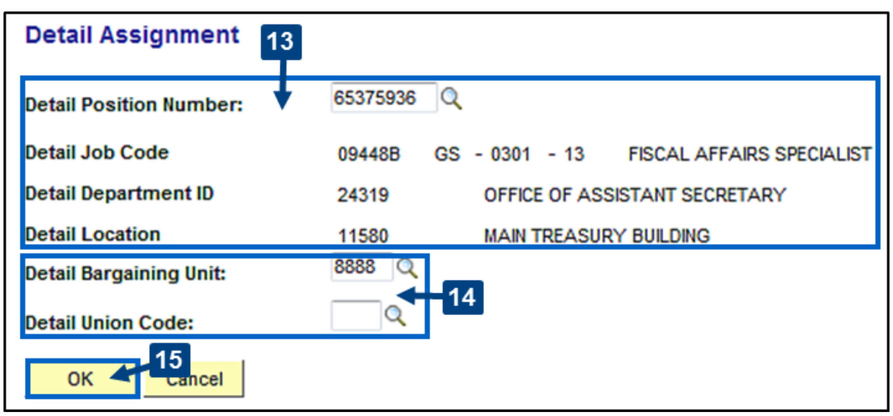
OR

Group Worklist: *Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control tab*

1. Enter or verify the **Actual Effective Date**.
2. Enter or verify the **Not To Exceed Date**.
3. Enter or lookup the appropriate **PAR Status**.
4. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
5. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
6. Enter or lookup the legal authority in the **Authority (1)** field.
7. Select the **PAR Remarks** link.
8. Enter or lookup the appropriate **Remark CD**.
9. Enter any necessary information in the remark rows.

Note: For additional remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

10. Select the **OK** button.
11. Select the **Job Data** tab.
12. On the **Job Data** tab, select the **Detail** link.
13. On the **Detail Assignment** page, enter or verify the **Detail Position Number** and related information.
14. Verify the **Detail Bargaining Unit**, and optionally, the **Detail Union Code**.
15. Select the **OK** button.



Chapter 13 Figure 252: Detail Assignment Page

16. On the **Job Data** tab, select the **Save** button.
17. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
18. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Job Data** tab).

13.10 EXTENSION OF NTE

OVERVIEW

An extension is a supplemental action that can be used to extend Not to Exceed (**NTE**) dates for existing temporary actions. The effective time period can be extended for following actions:

- Appointment
- Detail
- Leave Without Pay
- Promotion
- SES Limited Appointment
- Term of Appointment

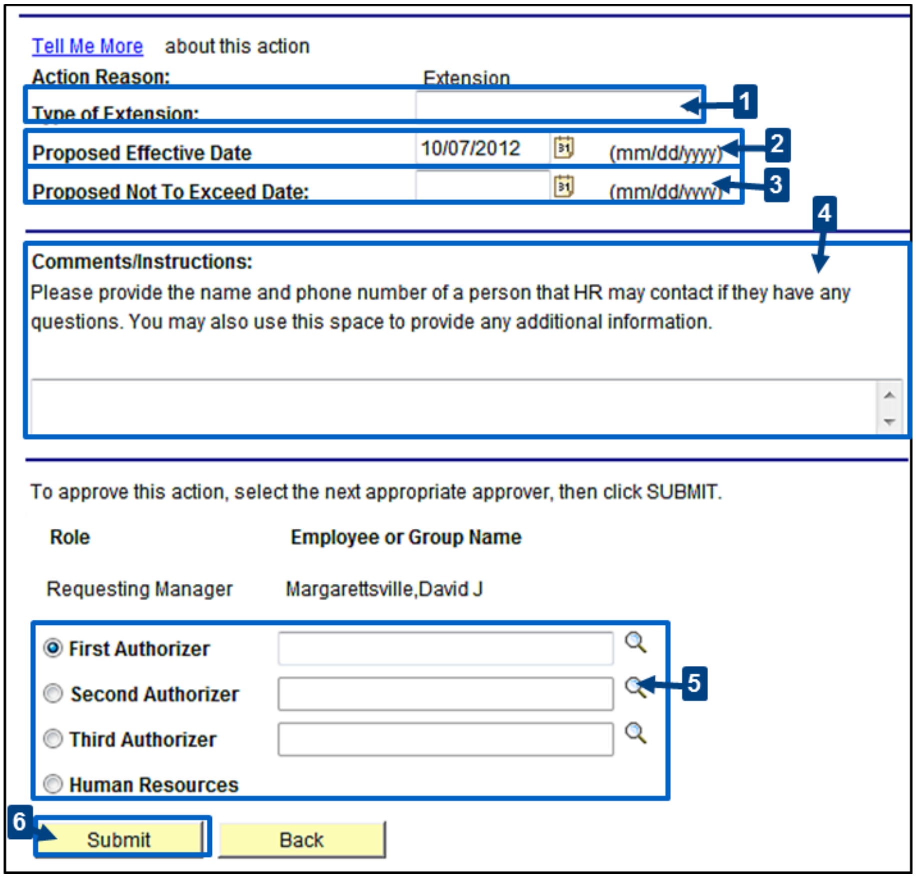
The process for requesting and processing an extension are the same, regardless of the extended action chosen.

To extend a Not to Exceed date for an existing temporary action:

INITIATING AN EXTENSION OF NTE IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet>Extension link>Extension page

1. Select the **Type of Extension**.
2. Enter or select the **Proposed Effective Date**.
3. Enter or select the **Proposed Not To Exceed Date**.
4. In the Comments/Instructions field, enter your **Name** and **Phone Number**.
5. Enter or lookup the appropriate **HR Authorizer**.
6. Select the **Submit** button. (A confirmation message will appear. Select **OK** to return to your Home Page.)



Chapter 13 Figure 253: Extension – MSS Request

Authorizing & Processing an Extension of NTE in HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Extension of NTE Action link>Data Control tab***

OR

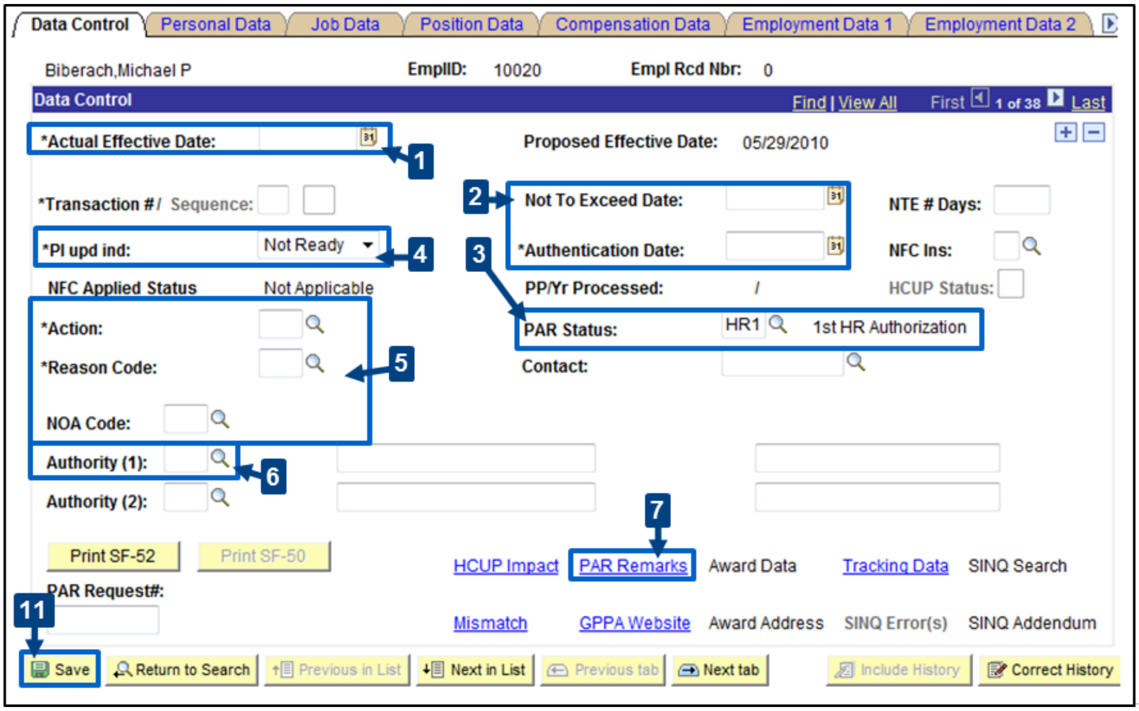
Group Worklist: ***Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Extension of NTE Action link>Data Control tab***

1. Enter or select the **Actual Effective Date**.
2. Enter or verify the **Not To Exceed Date** & **Authentication Date**.
3. Select or enter the appropriate **PAR Status**.
4. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
5. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
6. Enter or lookup the legal authority in the **Authority (1)** field.
7. Select the **PAR Remarks** link.
8. Enter or lookup the appropriate **Remark CD**.
9. Enter any necessary information in the remark rows.

Note: For additional Remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

10. Select the **OK** button.

11. On the **Data Control** tab, select the **Save** button.



Chapter 13 Figure 254: Extension– Data Control Tab

12. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.

13. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Data Control** tab).

13.11 FURLOUGH

OVERVIEW

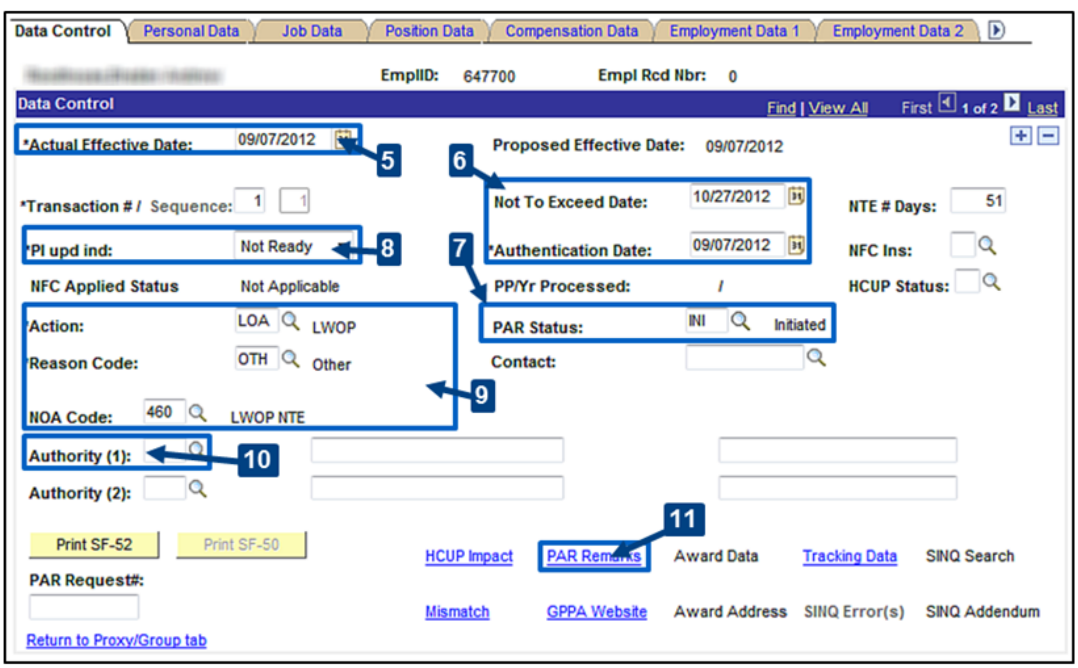
A Furlough action is one in which an employee is granted an unpaid leave of absence either by the employee's request, or as a result of a lack of funds, work, or a temporary closure. While a Leave Without Pay may be initiated via MSS, a furlough action may only be initiated via HRSS.

The initiate, authorize, and process a furlough action:

INITIATING, AUTHORIZING, AND PROCESSING A FURLOUGH IN HRSS

Menu tab>Back End Menu pagelet>Workforce Administration menu>Job Information link>HR1 Authorization link>HR1 Authorization page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. In the search results, select the desired employee.
4. On the **Data Control** page, select the add a row (**+**) button.
5. In the new row, enter or select the **Actual Effective Date**.
6. Enter or verify the **Not To Exceed Date & Authentication Date**.
7. Select or enter the appropriate **PAR Status**.
8. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
9. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
10. Enter or lookup the legal authority in the **Authority (1)** field.
11. Select the **PAR Remarks** link.



Chapter 13 Figure 255: Furlough Action- Data Control Tab

12. Enter or lookup the appropriate **Remark CD**.
13. Enter any necessary information in the remark rows.

> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 12-13 as necessary. To remove a remark select the remove row (**-**) button.

14. Select the **OK** button.
15. Select the **Employment Data 2** tab.
16. On the **Employment Data 2** tab, select the **Non Pay Data** link.
17. Enter or select the **Last Day Worked**.
18. Select the **OK** button.
19. Select the **NFC Data 1** tab.
20. On the **NFC Data 1** tab, enter or verify the **Leave Earning Status**.
21. Select the **Save** button.
22. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
23. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **NFC Data 1** tab).

13.12 LEAVE WITHOUT PAY NTE

OVERVIEW

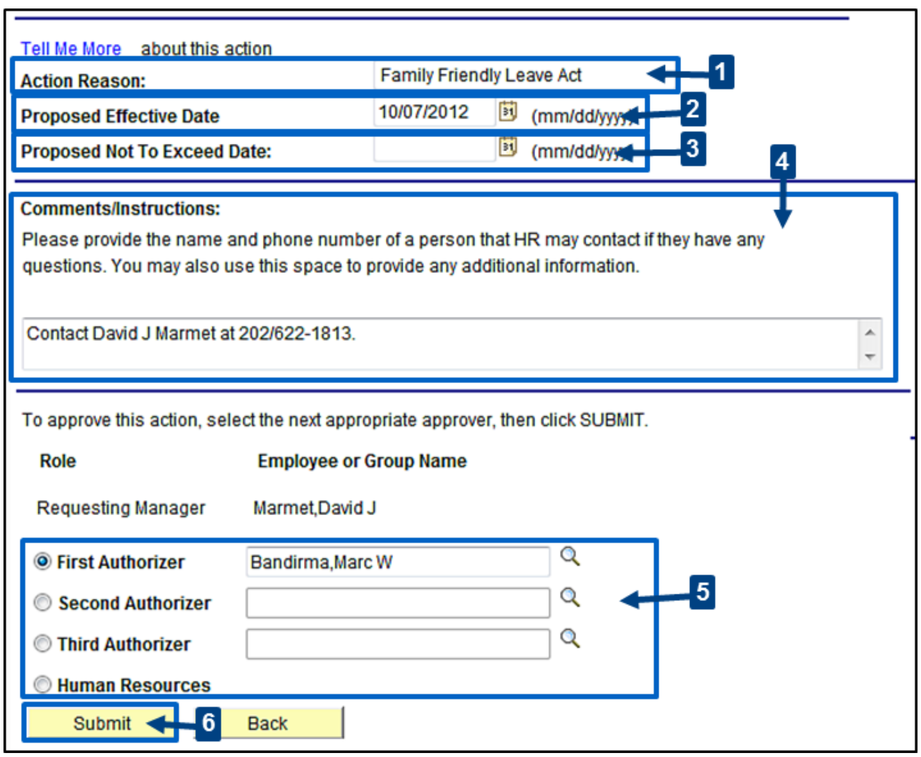
A Leave Without Pay Not to Exceed (LWOP NTE) action is one in which an employee is placed on unpaid leave for a variety of reasons (e.g., Education, Maternity/Paternity, Workers Compensation, etc.). A LWOP NTE action may be initiated via MSS or HRSS and will then be approved and processed via HRSS.

To initiate, authorize, and process a LWOP NTE action:

INITIATING A LEAVE WITHOUT PAY NTE IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet>Leave Without Pay NTE link>Leave Without Pay NTE page

1. Select the **Action Reason**.
2. Enter or select the **Proposed Effective Date**.
3. Enter or select the **Proposed Not To Exceed Date**.
4. In the Comments/Instructions field, enter your **Name** and **Phone Number**.
5. Enter or lookup the appropriate **HR Authorizer**.
6. Select the **Submit** button.



Chapter 13 Figure 256: Leave Without Pay – MSS Request

7. In the pop-up message, select the **OK** button. (This will take you to your Home Page.)

Authorizing and Processing a Leave Without Pay NTE in HRSS

***Individual Worklist:** HR tab>Worklist pagelet>Suspension Action link>Data Control tab*

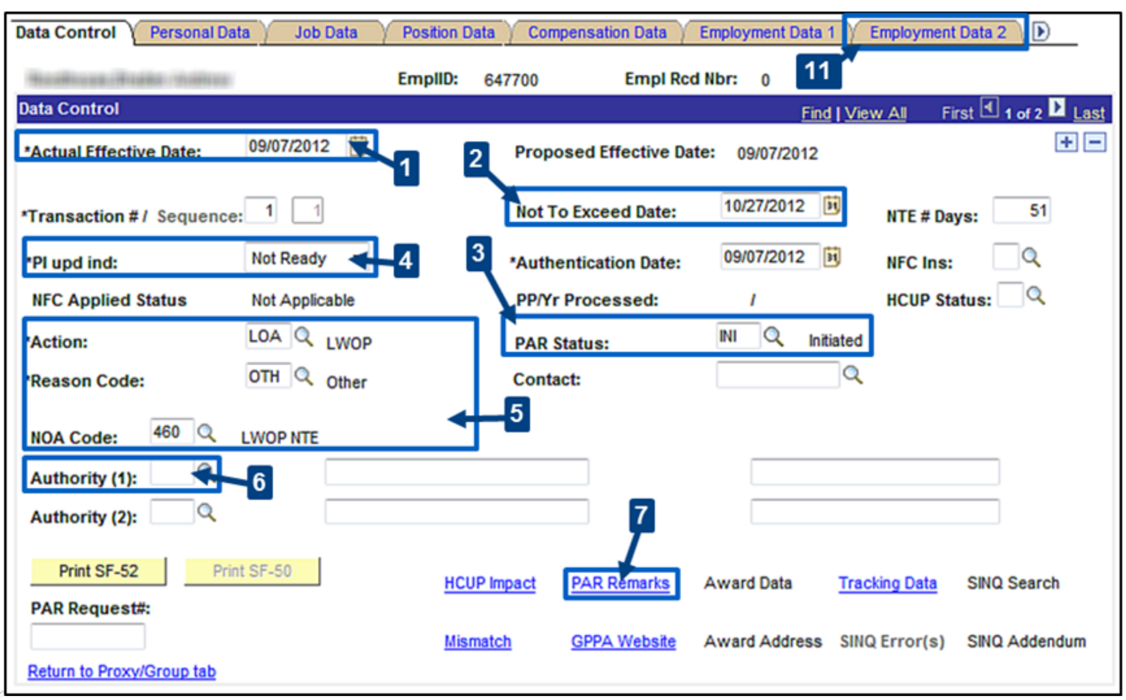
OR

***Group Worklist:** Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Leave Without Pay NTE link>Data Control tab*

1. Enter or select the **Actual Effective Date**.
2. Enter or verify the **Not To Exceed Date**.
3. Select or enter the appropriate **PAR Status**.
4. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
5. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
6. Enter or lookup the legal authority in the **Authority (1)** field.
7. Select the **PAR Remarks** link.
8. Enter or lookup the appropriate **Remark CD**.
9. Enter any necessary information in the remark rows.

Note: For additional Remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

10. Select the **OK** button.
11. Select the **Employment Data 2** tab.



Chapter 13 Figure 257: Leave Without Pay Action – Data Control Tab

12. On the **Employment Data 2** tab, select the **Non Pay Data** link.
13. On the **Non Pay Data** page, enter or verify the **Last Day Worked**.
14. Select the **OK** button.
15. Select the **NFC Data 1** tab.
16. On the **NFC Data 1** tab, enter or verify the employee's **Leave Earning Status**.
17. Select the **Save** button.
18. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
19. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **NFC Data 1** tab).

13.13 PAY RATE CHANGE

A Pay Rate change must be initiated in the back end of HR Connect by an HRSS user. HR Connect includes functionality to conduct the following Pay Rate Change transactions:

- Annuitant Adjustment
- Administrative Uncontrollable Overtime (AUO)
- Availability Pay
- Quality Increase
- Within Grade Increase (WGI)
- Denial of Within Grade Increase (WGI)
- General Manager (GM) Within Grade Increase (WGI)
- Termination of Grade Retention (TGR)

While all follow the same general procedure, steps do vary depending on the type of Pay Rate Change transaction. The unique steps associated with each action are outlined in the table below:

Change	Unique Step(s)
a. Annuitant Adjustment	15
b. Quality Increase	16
c. WGI	16
d. GM WGI	16
e. Retention Allowance	17-19
f. AUO	17-21
g. Availability Pay	20-21
h. TGR	22-23

Table 1: Pay Rate Change Actions & Unique Steps

To initiate, authorize, and process a Pay Rate change action:

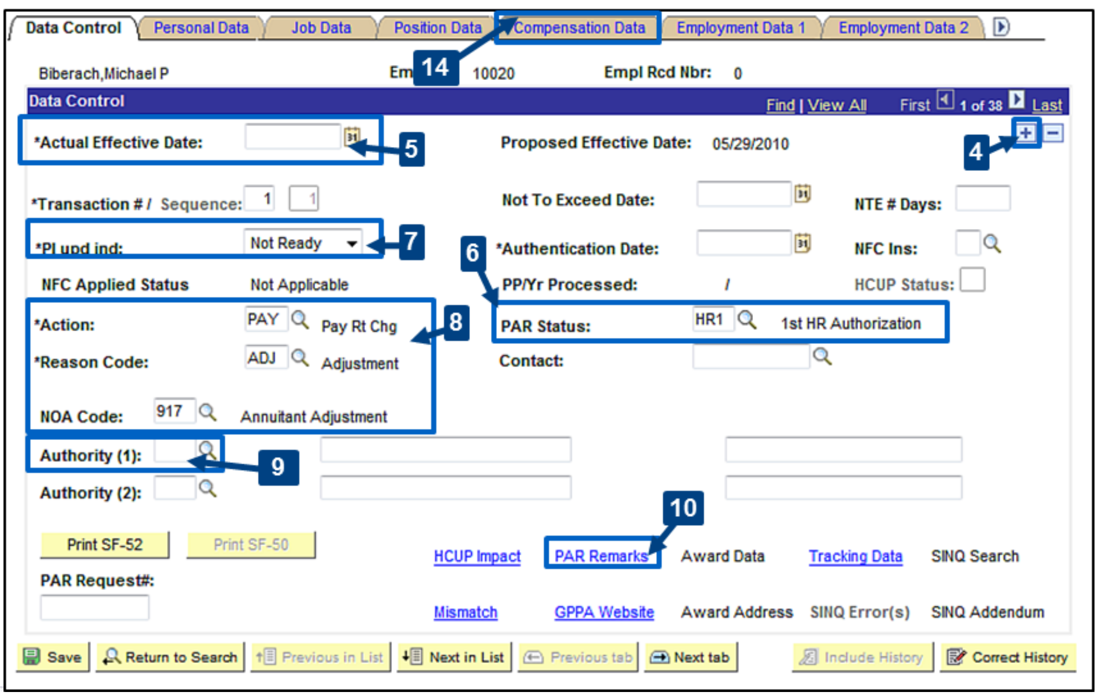
Initiating, Authorizing, and Processing a Pay Rate Change in HRSS

Menu tab>Back End Menu pagelet>Workforce Administration menu>Job Information link>HR1 Authorization link>HR1 Authorization page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. In the search results, select the desired employee.
4. On the **Data Control** page, select the add a row (**+**) button.
5. Enter or select the **Actual Effective Date.**
6. Select or enter the appropriate **PAR Status**.
7. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
8. Enter or select the **Action**, **Reason Code**, and **NOA Code** fields.
9. Enter or lookup the legal authority in the **Authority (1)** field.
10. Select the **PAR Remarks** link.
11. Enter or lookup the appropriate **Remark CD**.
12. Enter any necessary information in the remark rows.

> **Note:** For additional Remarks, select the add row (**+**) button & repeat steps 11-12 as necessary. To remove a remark select the remove row (**-**) button.

13. Select the **OK** button.
14. Select the **Compensation Data** tab.



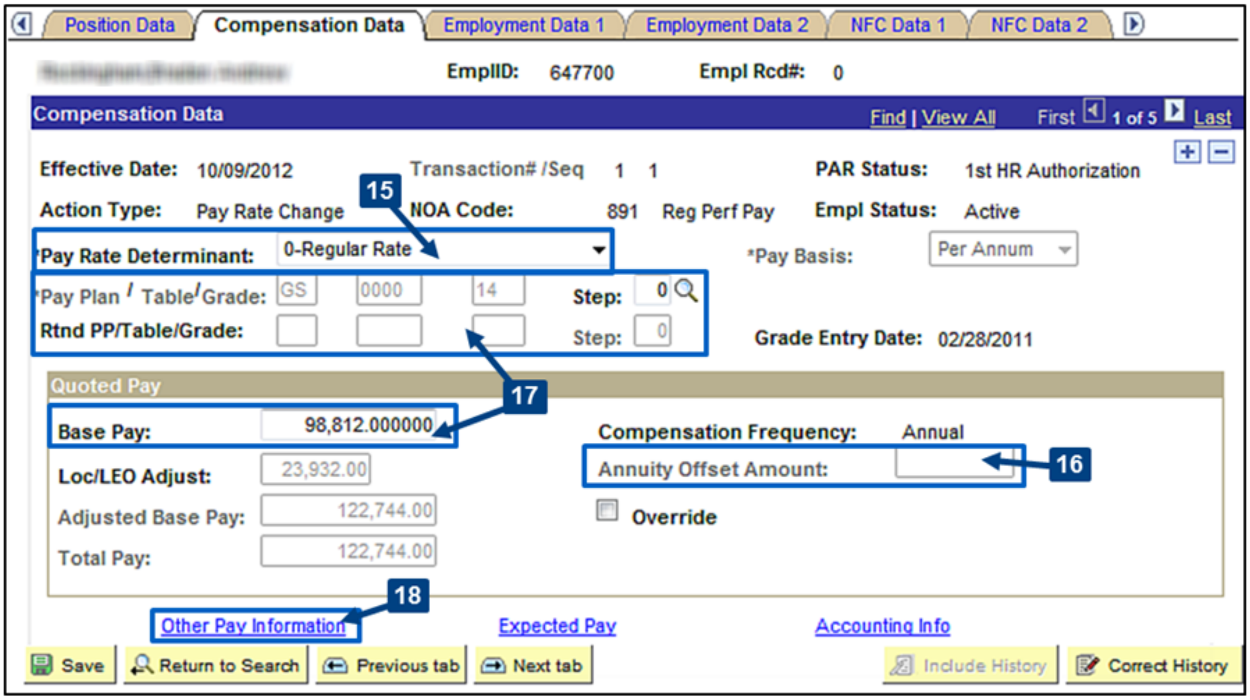
Chapter 13 Figure 258: Pay Rate Change Action – Data Control Tab

15. Select or verify the **Pay Rate Determinant**.

16. (Annuitant Adjustment Only): Enter or verify the **Annuity Offset Amount**.

17. (Quality Increase, WGI, GM WGI, & TGR Only): Enter or verify the **Step**, **Step Entry Date**, and **Base Pay**.

18. (AUO and Retention Allowance Only): Select the **Other Pay Information** link.



Chapter 13 Figure 259: Pay Rate Change - Compensation Data Tab

19. (AUO and Retention Allowance Only): On the **Other Pay Information** page, enter or lookup the appropriate **Earnings Code**.

Note: For additional Earnings Codes, select the add row (**+**) button. To remove a remark select the remove row (**-**) button.

20. (AUO and Retention Allowance Only): Select the **OK** button.

21. (AUO and Availability Pay Only): Select the **NFC Data 1** tab.

22. (AUO and Availability Pay Only): On the **NFC Data 1** tab, enter or lookup the **Special Employee Pay Code**.

Caution! The Special Employee Pay Code entered in **Step 19** must be compatible with the Earnings Code entered in **Step 16**.

23. (TGR Only): Select the **Employment Data 2** tab.
24. (TGR Only): On the **Employment Data 2** tab, enter or select the **Expires Date**.
25. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
26. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Employment Data 2** tab).

13.14 PROMOTIONS

OVERVIEW

The two main types of promotions are Career Ladder and Temporary promotions. A Career Ladder Promotion is a standard type of promotion that is part of the employee's normal career track. A Temporary Promotion is when an employee is promoted for a limited time to meet a particular need. This could include situations where an existing employee takes a temporary leave, or if someone leaves the organization, thus necessitating someone to fill the position on an interim basis until a permanent replacement can be found. It should also be noted that promotions can be classified as either Competitive or Non-Competitive. A Competitive Promotion is one in which there are multiple candidates for the same position, while with a Non-Competitive Promotion, there is only one candidate.

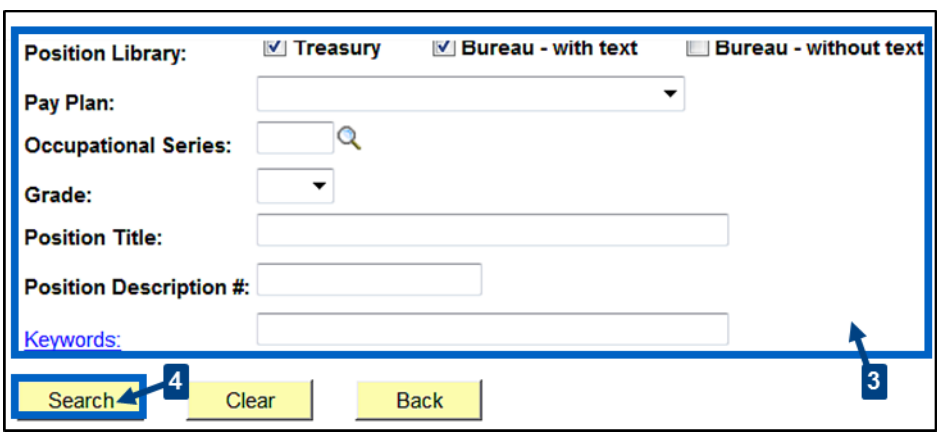
Regardless of the type of promotion, the phases are the same. Promotions must first be initiated (MSS), then authorized (MSS), and finally processed (HRSS). The initiation phase kicks off the action and provides the information necessary to move the action forward. The authorization phase is when others can approve return, or reject the action from continuing. The processing phase allows HR to complete the action so that it can be sent to NFC.

To initiate, authorize, and process a Promotion action:

INITIATING A PROMOTION IN MSS

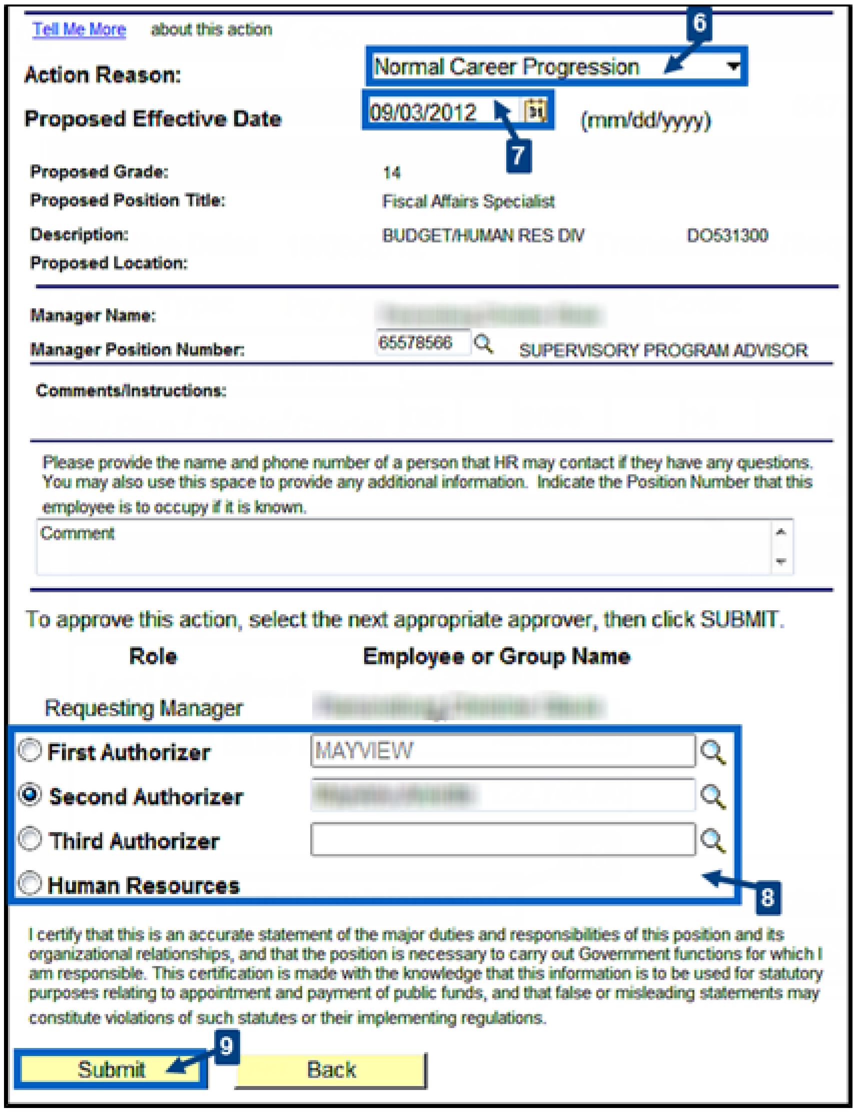
Manager Tab>People and Positions pagelet>Employee Name link>Employee Data/Personnel Actions page

1. Select the **Promotion** link.
2. On the **Personnel Actions – Vacant Positions** page, select the appropriate **Position #** or, if you are conducting a Career Ladder Promotion, select the **click here** link.
3. (Career Ladder Promotion Only): On the **Position Description- Search** page, enter the relevant search criteria.
4. (Career Ladder Promotion Only): Select the **Search** button.



Chapter 13 Figure 260: Position Description- Search (For Promotion)

5. (Career Ladder Promotion Only): On the **Position Description Library – Results** page, select the appropriate **Official Position Title**.
6. On the **Promotion** page, select the **Action Reason**. (This field is automatically filled when conducting a Career Ladder Promotion.)
7. Enter or select the **Proposed Effective Date**.
8. Enter or lookup the appropriate **Authorizer**.
9. Select the **Submit** button. (A confirmation message will display. select the **OK** button to return to your Home Page.)



Chapter 13 Figure 261: Promotion Request Form

Authorizing & Processing a Promotion in HRSS

Individual Worklist: HR tab>Worklist pagelet>Personnel Action link>Data Control tab

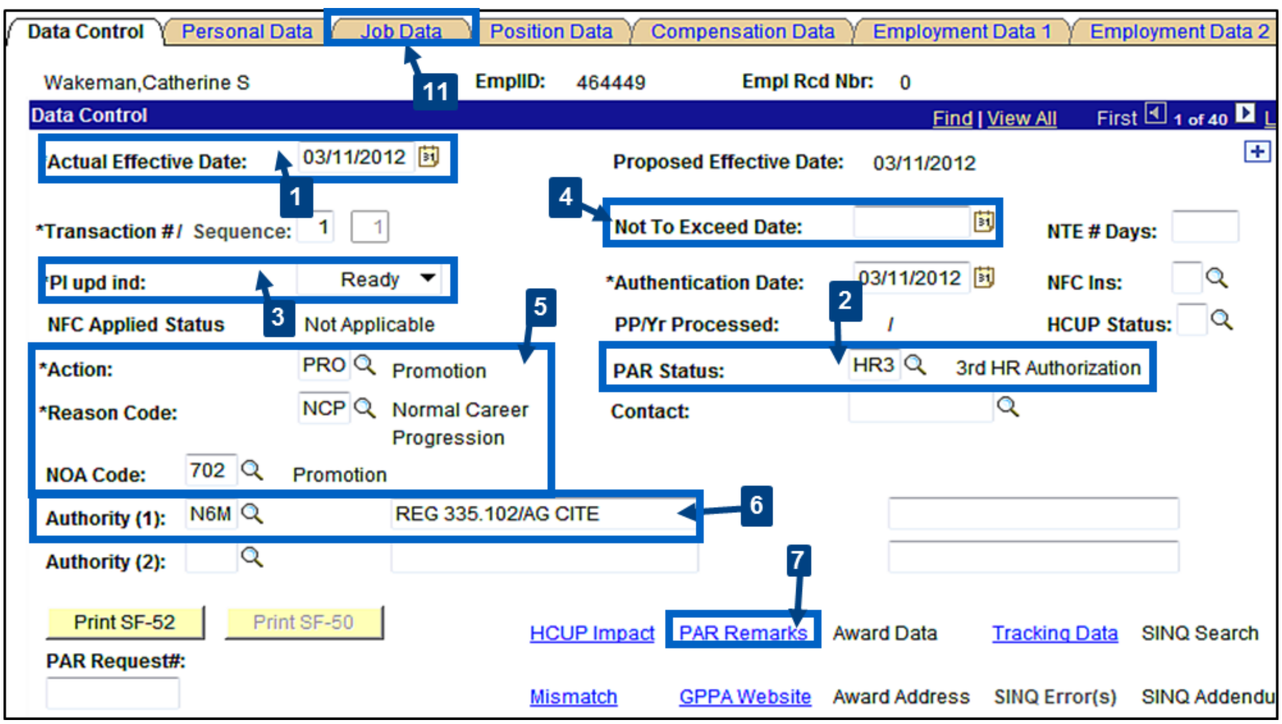
OR

Group Worklist: Proxy/Group tab>Group Worklist pagelet> Group Worklist link>Personnel Action link>Data Control tab

1. Enter or select the **Actual Effective Date**.
2. Enter or lookup the appropriate **PAR Status**.
3. (If the PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. (Temporary Promotion Only): Enter or select the **NTE Date**.
5. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
6. Enter or lookup the legal authority in the **Authority (1)** field.
7. Select the **PAR Remarks** link.
8. Enter or lookup the appropriate **Remark CD**.
9. Enter any necessary information in the remark rows.

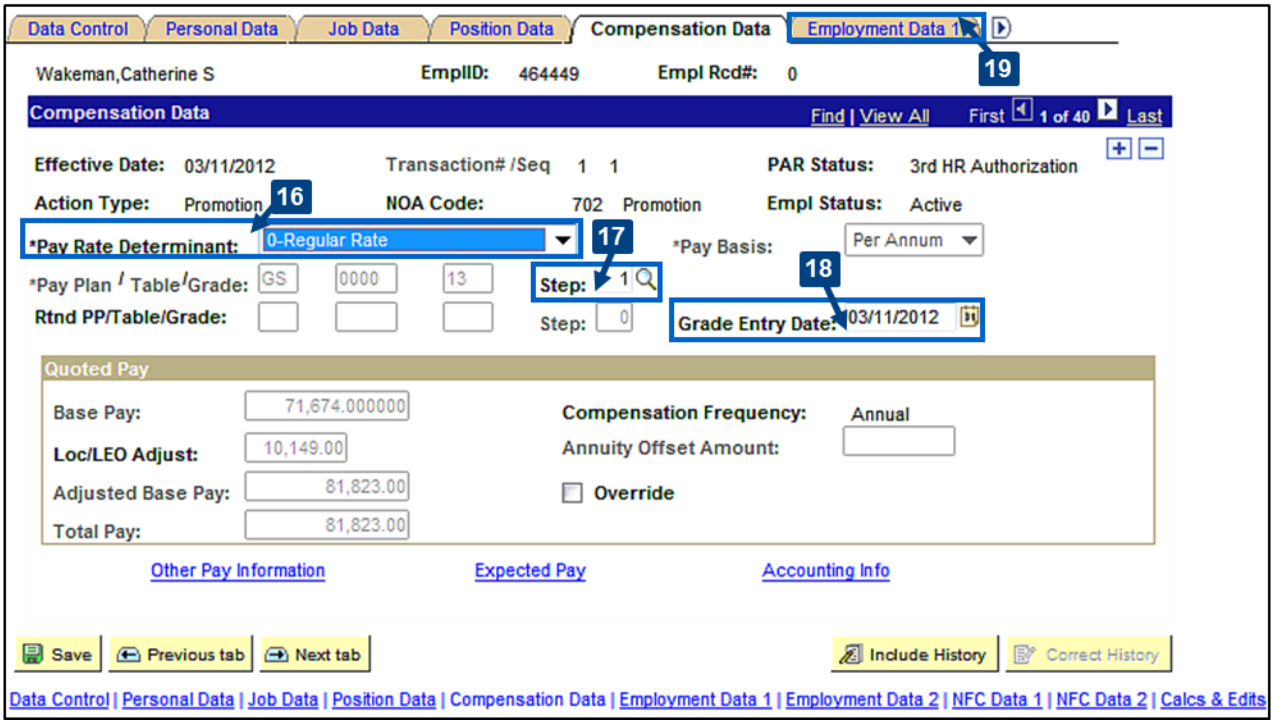
> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 8-9 as necessary. To remove a remark select the remove row (**-**) button.

10. Select the **OK** button.
11. Select the **Job Data** tab.



Chapter 13 Figure 262: Data Control Tab (Promotion)

12. On the **Job Data** tab, enter or lookup the **Position** to which the employee is being promoted.
13. Select the **Position Data** tab.
14. On the **Position Data** tab, select the desired appointment type (**Type Appt**).
15. Select the **Compensation Data** tab.
16. On the Compensation Data tab, Enter or verify the **Pay Rate Determinant**.
17. Enter or verify the **Pay Plan/Table/Grade** and **Step**.
18. Enter or verify the **Grade Entry Date**.
19. Select the **Employment Data1** tab.



Chapter 13 Figure 263: Compensation Data Tab (Promotion)

20. On the **Employment Data 1** tab, enter or select the **SCD-WGI** date.
21. Select the **Save** button.
22. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
23. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Employment Data 1** tab).

13.15 REALIGNMENT

OVERVIEW

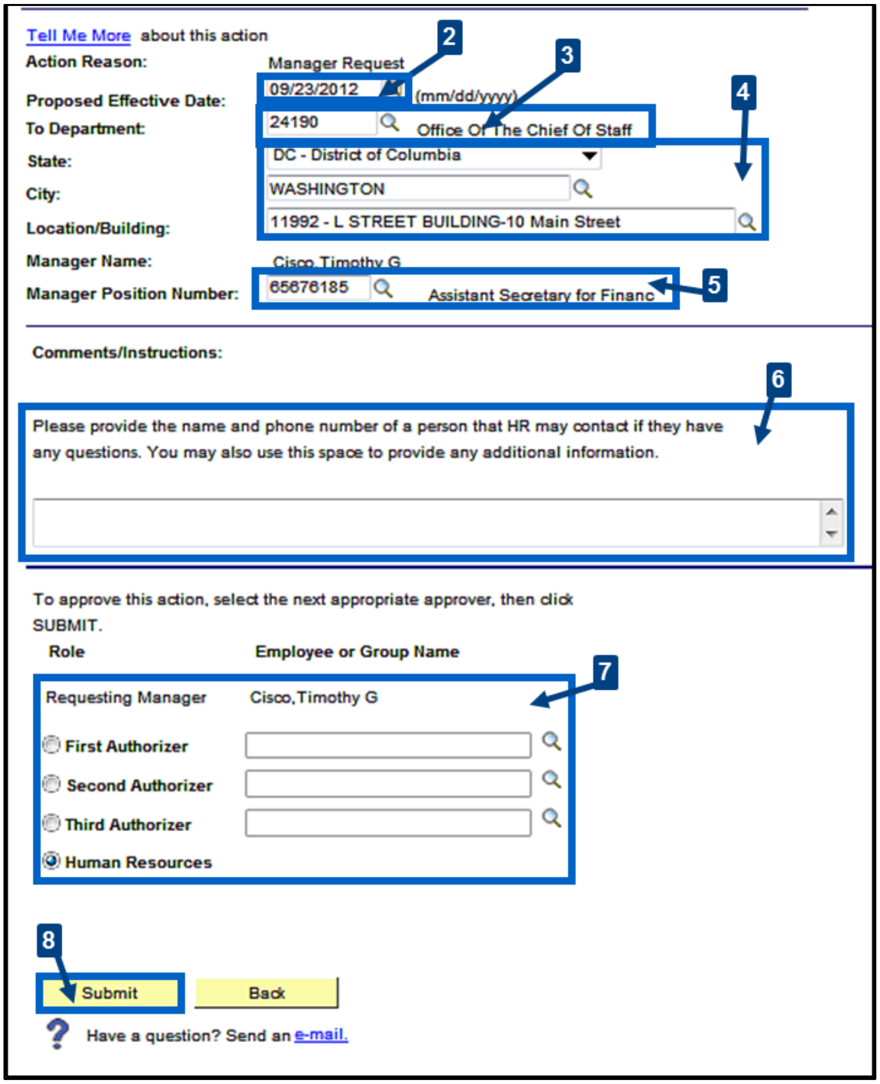
A Realignment occurs when an employee's position remains the same, but the organization to which that employee belongs, changes. Realignment actions are initiated via MSS, and both authorized and processed via HRSS.

To initiate, authorize, and process a Realignment action:

INITIATING A REALIGNMENT IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Realignment** link.
2. On the **Realignment** page, enter or select the **Proposed Effective Date**.
3. Select the department the employee will be realigned to in the **To Department** field.
4. Enter or select the employee's new office location (i.e., **State**, **City**, and **Location/Building**)
5. Enter or lookup the **Manager Position Number**.
6. In the **Comments/Instructions** field, enter the contact person's **Name** and **Phone Number**.
7. Enter or lookup the appropriate **Authorizer**.
8. Select the **Submit** button.



Chapter 13 Figure 264: Realignment Page

9. A message will display, asking you if you would like to initiate another Realignment action. Select **Yes** to initiate another action, or **No** to continue on with your current action.
10. (Optional): From the **Apply Realignment to Another Employee** page, Enter or select the desired employee.
11. (Optional): Select **Next**.
12. (Optional):Repeat **Steps 2-8**.
13. In the pop-up message, select the **OK** button. (This will take you to your Home Page.)

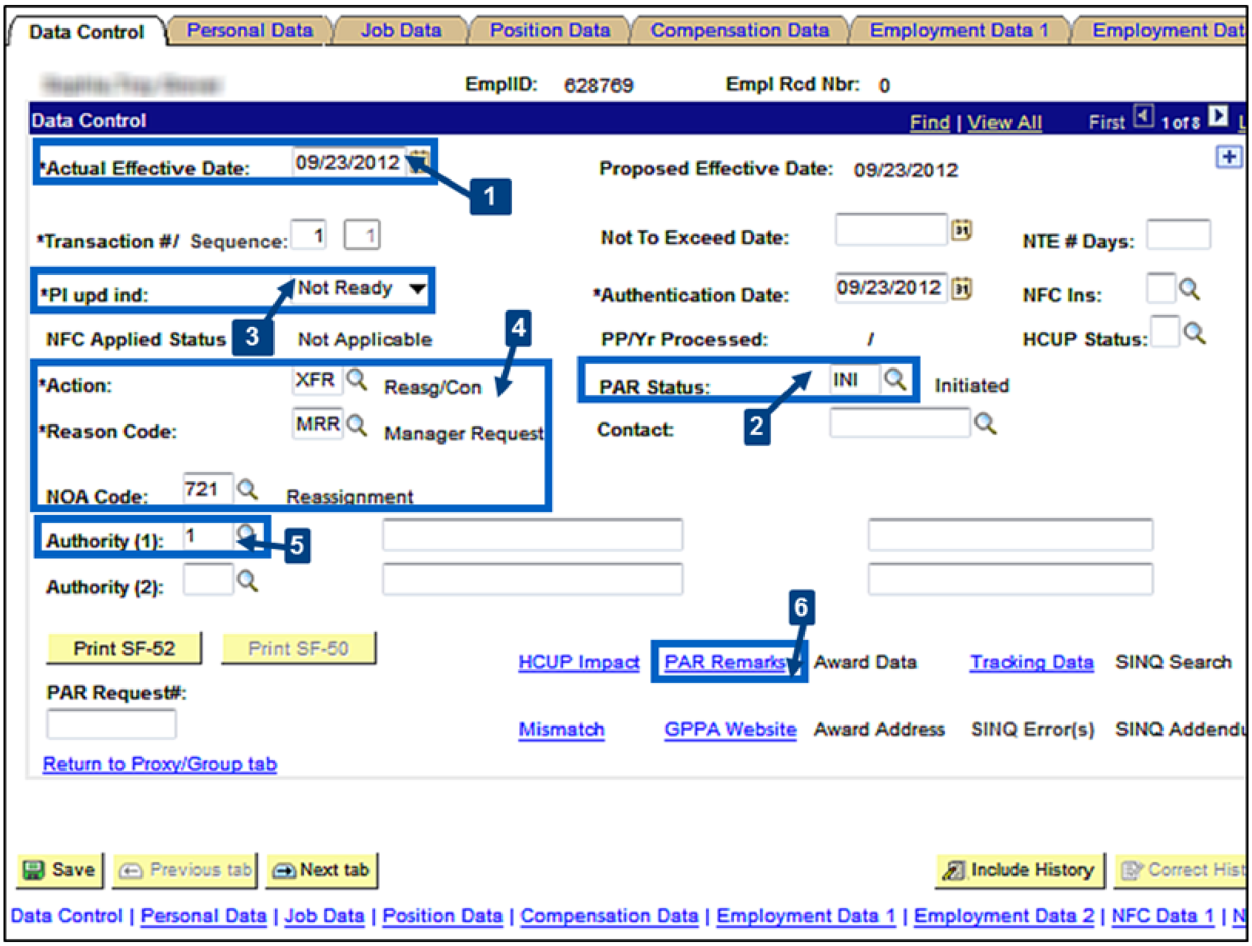
Authorizing & Processing a Job Realignment in HRSS

***Individual Worklist:** HR tab>Worklist pagelet>Personnel Action link>Data Control page*

OR

***Group Worklist:** Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control page*

1. Enter or verify the **Actual Effective Date**.
2. Select or enter the appropriate **PAR Status**.
3. (If PAR Status is HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **Par Remarks** link.



Chapter 13 Figure 265: Job Realignment Data Control Tab

7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

> **Note:** For additional remarks, select the add row (**+**) button & repeat steps 7-8 as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select the **Job Data** tab.
11. On the **Job Data** tab, verify the position information (e.g., **Business Unit**, **Department**, **Location**, etc.)
12. Select the **Compensation Data** tab.
13. On the **Compensation Data** tab, verify the **Step**.
14. Select the **Save** button.
15. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
16. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Compensation Data** tab.)

13.16 REASSIGNMENT

OVERVIEW

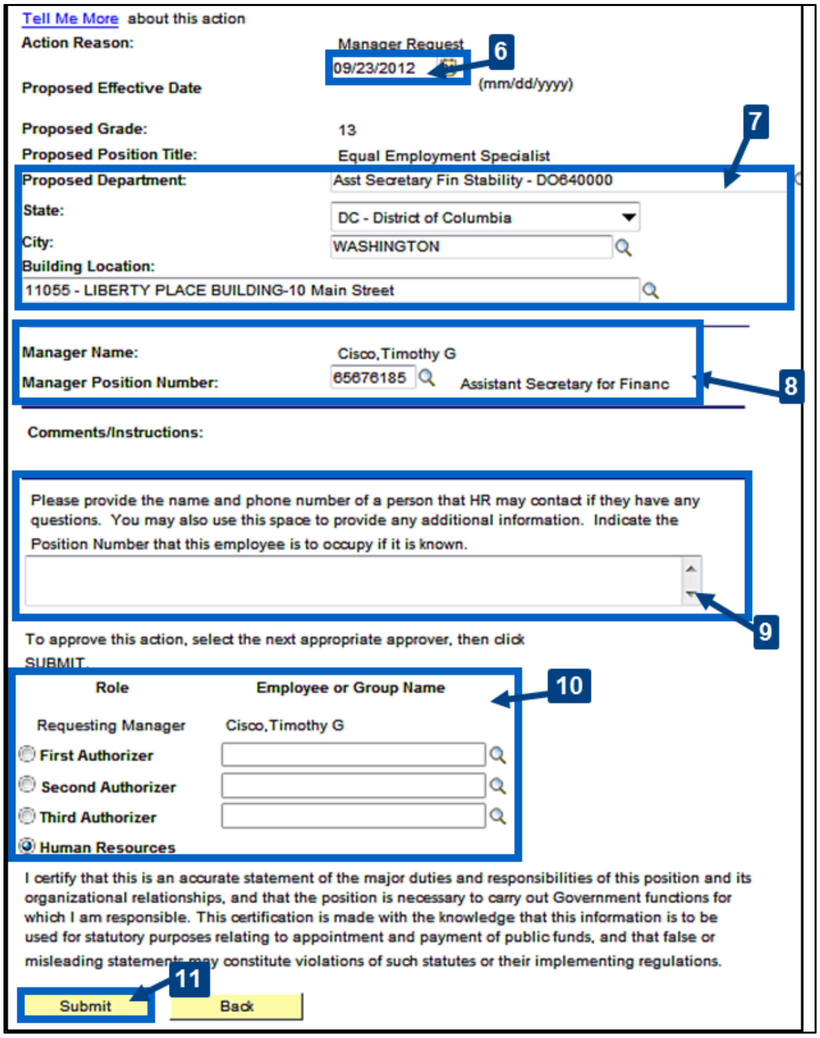
A Reassignment is an action by which an employee is assigned to a position that is different from the one that the individual currently occupies. This position can be within the current organization, or to a new organization. The action will be initiated via MSS, and then approved and processed via HRSS.

To initiate, authorize, and process a Reassignment:

INITIATING A REASSIGNMENT IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Reassignment** link.
2. On the **Personnel Actions – Vacant Positions** page, select the appropriate **Position #** or, if the position is not listed, select the **here** link at the bottom of the page.
3. (If you selected the **here** link): On the **Position Description- Search** page, enter the relevant search criteria.
4. (If you selected the **here** link): Select the **Search** button.
5. (If you selected the **here** link): On the **Position Description Library – Results** page, select the appropriate **Official Position Title**.
6. On the **Reassignment** page, enter or select the **Proposed Effective** date.
7. Enter or select the employee's new **Proposed Department** and **Office Location** (i.e., **State**, **City**, and **Building Location**).
8. Enter or lookup the **Manager Position Number**.
9. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of the person who can be contacted for this action (e.g., your name).
10. Enter or lookup the appropriate **Authorizer**.
11. Select the **Submit** button. (A confirmation message will display, select the **OK** button to return to your Home Page.)



Chapter 13 Figure 266: Reassignment Page

AUTHORIZING & PROCESSING A JOB REASSIGNMENT IN HRSS

Individual Worklist: *HR tab>Worklist pagelet>Personnel Action link>Data Control page*

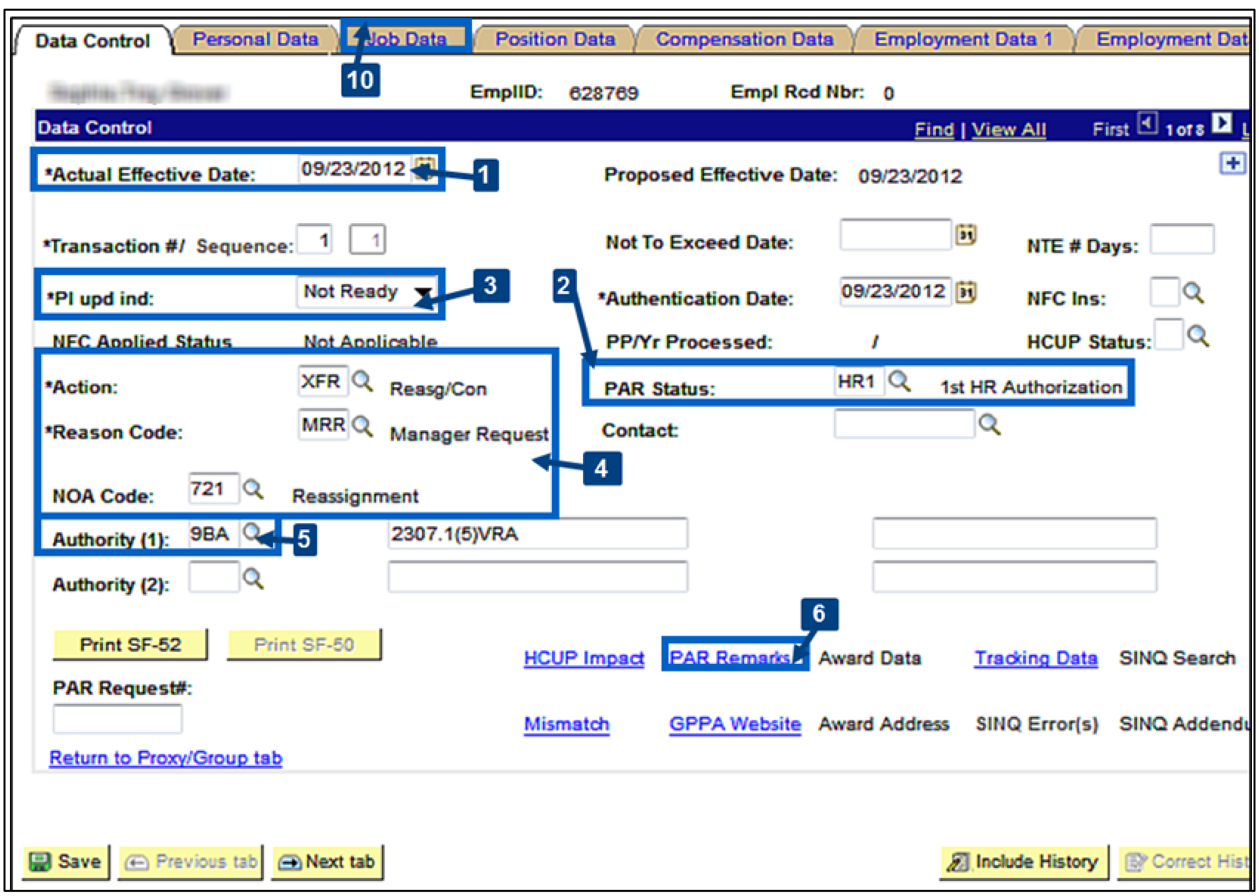
OR

Group Worklist: *Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control page*

1. Enter or verify the **Actual Effective Date**.
2. Select or enter the appropriate **PAR Status**.
3. (If the PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 7-8 as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select the **Job Data** tab.



Chapter 13 Figure 267: Processing A Job Reassignment – Data Control Tab

11. On the **Job Data** tab, verify the position information (e.g., **Business Unit**, **Department**, **Location**, etc.)
12. Select the **Compensation Data** tab.
13. On the **Compensation Data** tab, verify the **Step**.
14. Select the **Save** button.
15. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
16. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Compensation Data** tab).

13.17 REHIRE (USING THE BACK END)

OVERVIEW

The process for rehiring an employee is different from that of hiring a new employee. An accession (hiring) action involves filling a vacant position with an employee that doesn't already exist in the system. With a rehiring action, the person being rehired already exists in the system, as that employee has previously worked for the organization but had been separated from the organization. The normal method for performing an accession action (i.e. creating a new data row) will not work. To properly rehire an employee, it will be necessary to add a row to their existing inactive record.

This action will need to be initiated, authorized, and processed by HR, via the **Back End Menu**.

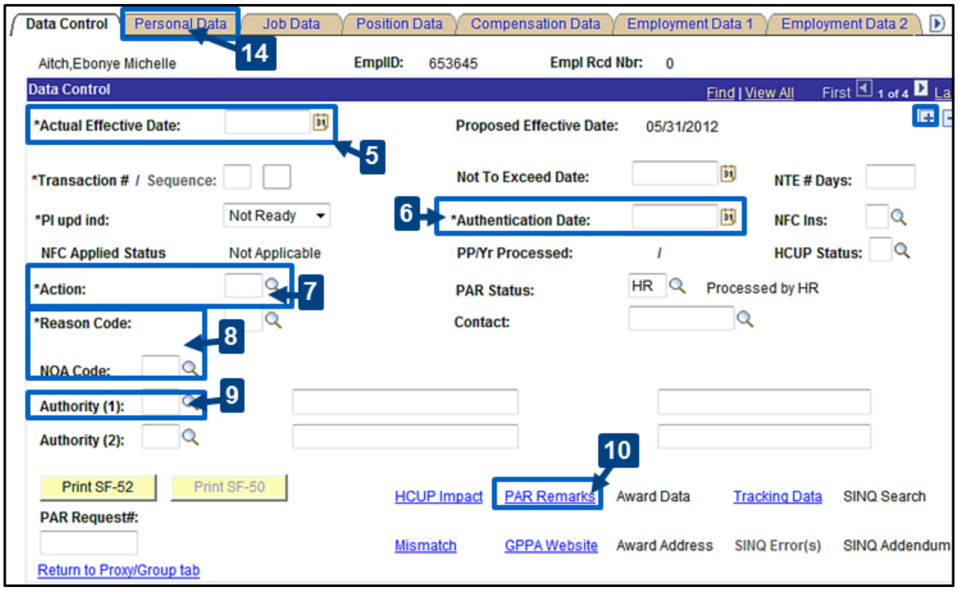
INITIATING, AUTHORIZING, AND PROCESSING A REHIRE IN HRSS

Menu tab>Workforce Administration menu>Job Information menu>HR1 Authorization link>HR1 Authorization page

1. Enter the relevant search criteria.
2. Select the **Search** button.
3. In the search results, select the desired employee.
4. On the **Data Control** tab, select the add a new row (**+**) button.
5. Enter the desired **Actual Effective Date**.
6. Enter the appropriate **Authentication Date**.
7. In the **Action** field, enter or lookup **REH** (Rehire).
8. Enter or select the appropriate **Reason Code** and **NOA Code**.
9. Enter or lookup the legal authority in the **Legal Authority (1)** field.
10. Select the **PAR Remarks** link.
11. Enter or lookup the appropriate **Remark CD**.
12. Enter any necessary information in the remark rows.

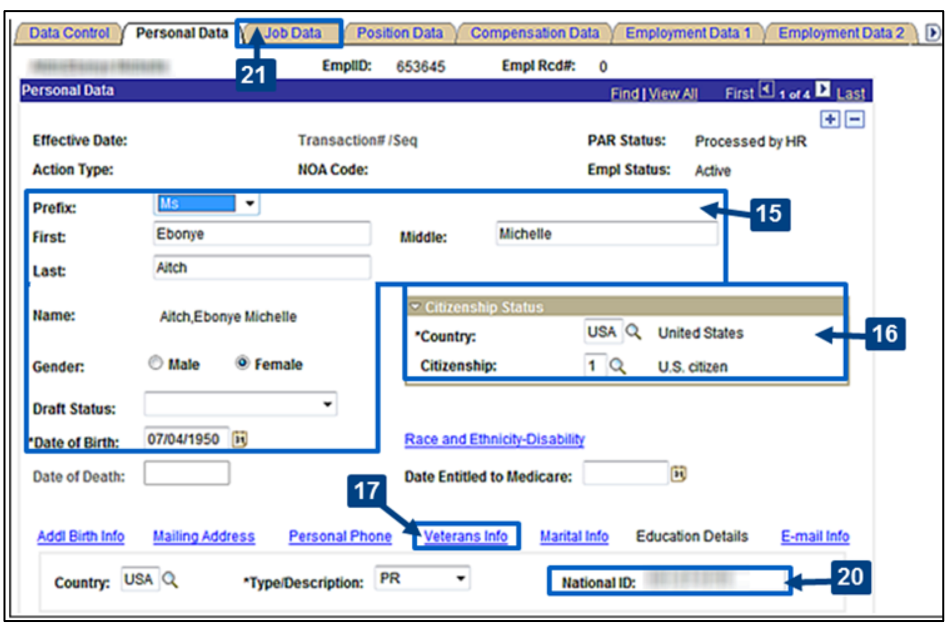
Note: For additional remarks, select the add row (**+**) button & repeat Steps 11-12 as necessary. To remove a remark select the remove row (**-**) button.

13. Select the **OK** button.
14. Select the **Personal Data** tab.



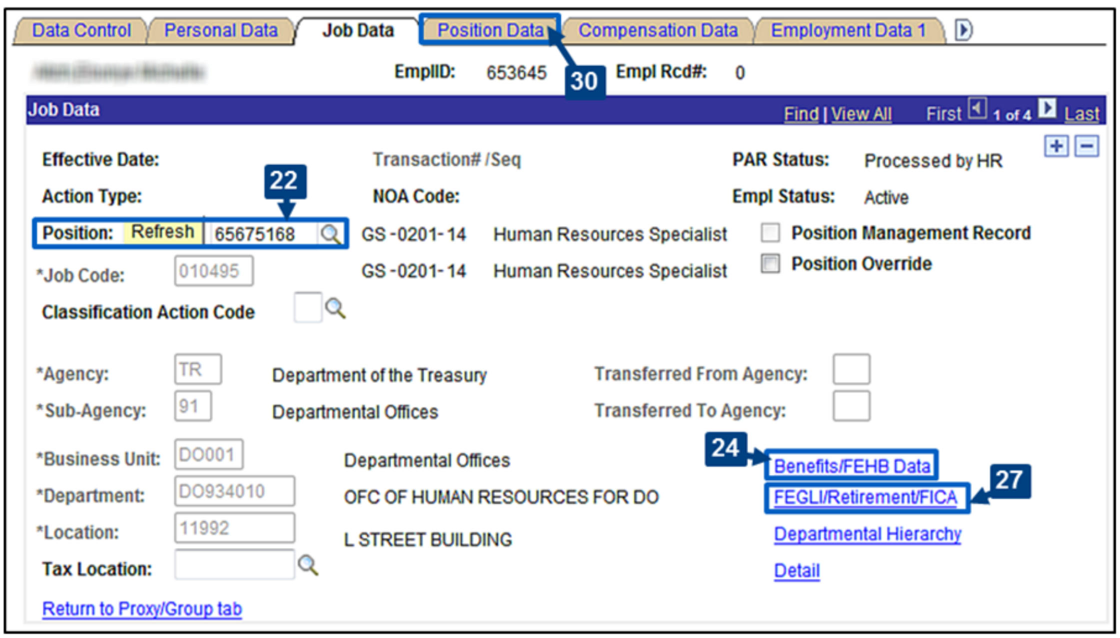
Chapter 13 Figure 268: Data Control Tab – Rehire Action

15. On the **Personal Data** tab, verify the new hire's **Name**, **Gender**, and **Date of Birth**.
16. Verify the new hire's **Citizenship Status**.
17. Select the **Veterans Info** link.
18. On the **Veterans Info** page, verify the new hire's **Veterans Status**.
19. Select the **OK** button.
20. On the **Personal Data** tab, verify the new hire's **National ID**.
21. Select the **Job Data** tab.



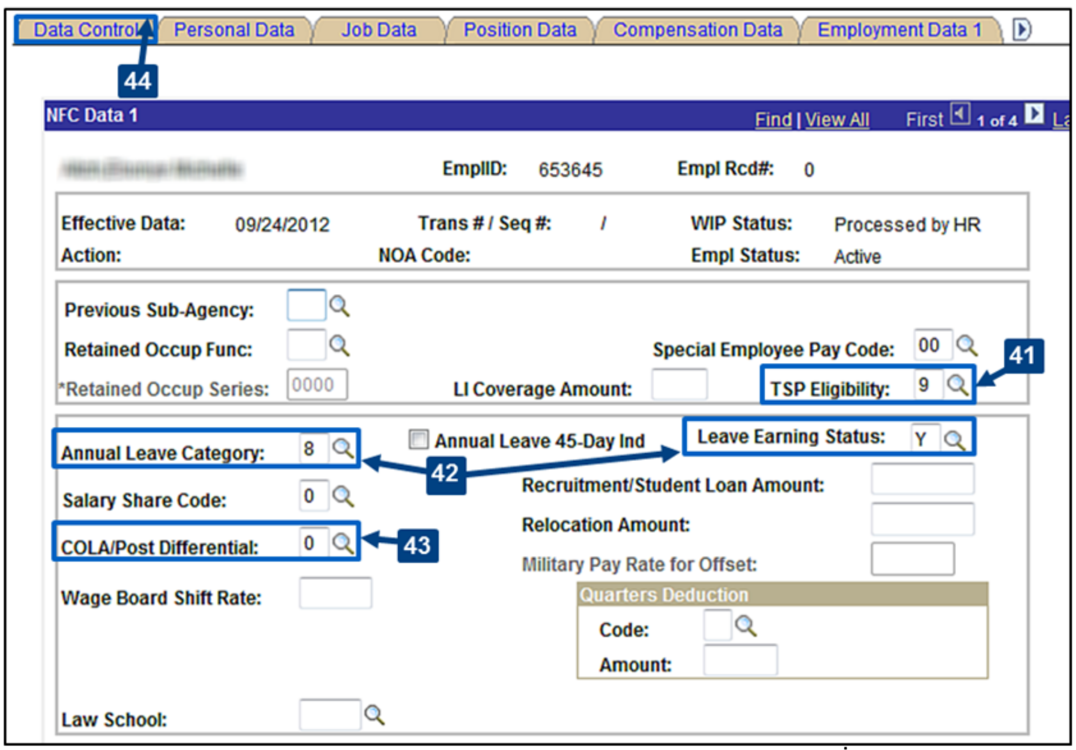
Chapter 13 Figure 269: Personal Data Tab – Rehire Action

22. On the **Job Data** tab, enter the new hire's **Position #**.
23. (Optional): Enter the appropriate code in the **Transferred From Agency** field.
24. Select the **Benefits/FEHB Data** link.
25. On the Benefits/FEHB Data page, verify the new hire's **Benefits Program**, **FEHB Eligibility**, and **FEHB Coverage**.
26. Select the **OK** button.
27. On the Job Data tab, Select the **FEGLI/Retirement Data/FICA** link.
28. On the **FEGLI/Retirement Data/FICA page**, verify the following fields:
    a. **FEGLI Code**.
    b. **Retirement Plan**.
    c. **FERS Coverage**.
    d. **Previous Retirement Coverage**.
    e. **Annuitant Indicator**.
29. Select the **OK** button.
30. Select the **Position Data** tab.



Chapter 13 Figure 270: Job Data Tab – Rehire Action

31. On the **Position Data** tab, verify the position information.
32. Select the appropriate **Appointment Type**.
33. Select the **Compensation Data** tab.
34. On the Compensation Data tab, verify the **Pay Rate Determinant**, **Pay Basis**, and **Pay Plan/Table/Grade**.
35. Select the **Employment Data 1** tab.
36. On the Employment Data 1 tab, verify the **Service Computation Dates**.
37. Select the **Employment Data 2** tab.
38. On the **Employment Data 2** tab, verify the new hire's **Tenure** status.
39. (If Career Conditional): Verify the probationary period on the **Probation Details** page via the **Probation Details** link.
40. Select the **NFC Data 1** tab.
41. On the **NFC Data 1** tab, select the appropriate **TSP Eligibility**.
42. Verify the **Annual Leave Category** and **Leave Earning Status**.
43. Verify the **COLA** (Cost of Living Adjustment).
44. Select the **Data Control** tab.



Chapter 13 Figure 271: NFC Data 1 Tab – Rehire Action

45. On the **Data Control** tab, enter or lookup the appropriate **PAR Status**.
46. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
47. Select the **Save** button.
48. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
49. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Data Control** tab).

13.18 RETIREMENT

OVERVIEW

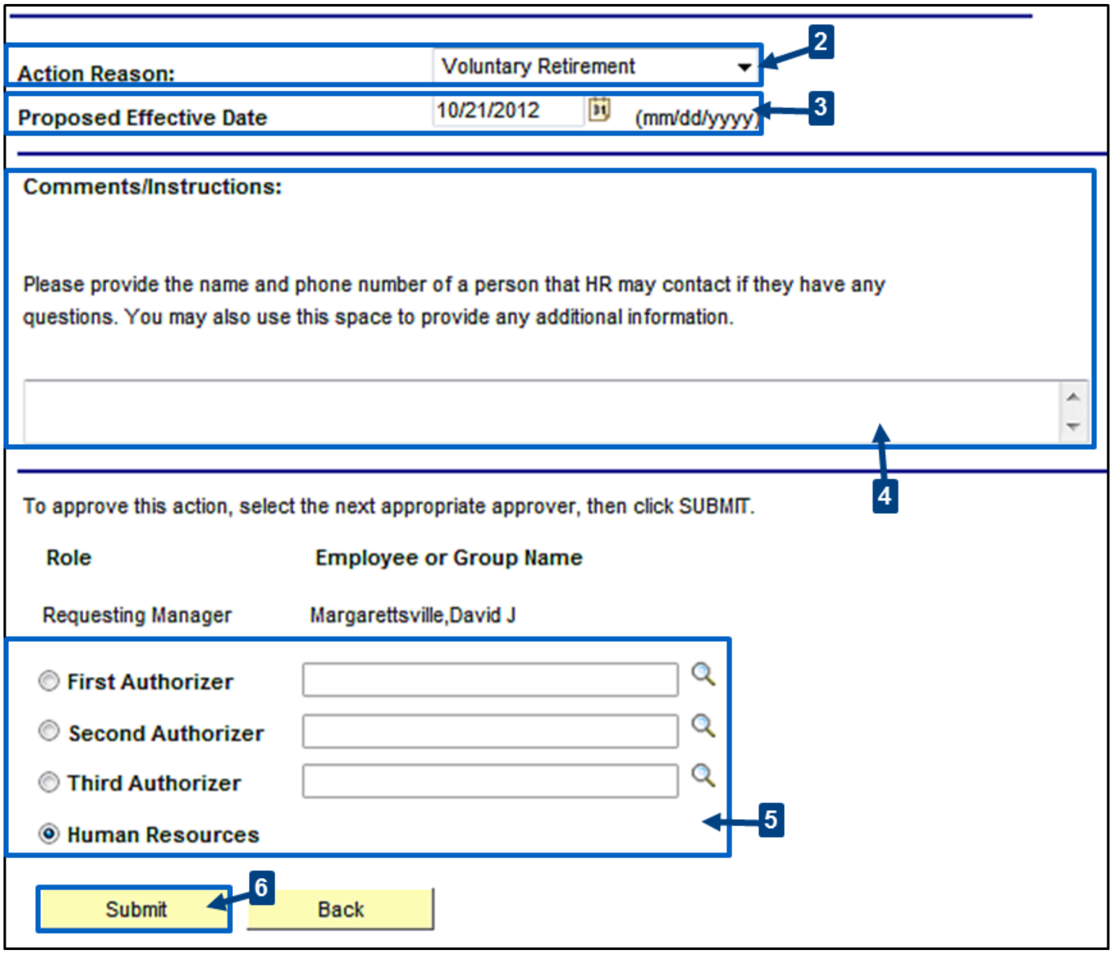
An employee may initiate a retirement action if he or she is planning to retire within the next 30-60 days. This document may be initiated via ESS or MSS, and will then be approved and processed via HRSS. The steps for initiating a Retirement via ESS are presented in the ESS Actions section. This section focuses primarily on MSS and HRSS functionality.

To initiate, authorize, and process a Retirement:

INITIATING A RETIREMENT IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Retirement** link.
2. On the **Retirement** page, select the appropriate **Action Reason**.
3. Enter or select the **Proposed Effective Date**.
4. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** who can be contacted for this action (e.g., your name).
5. Enter or lookup the appropriate **Authorizer**.
6. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 272: The Initiate A Retirement Action Form

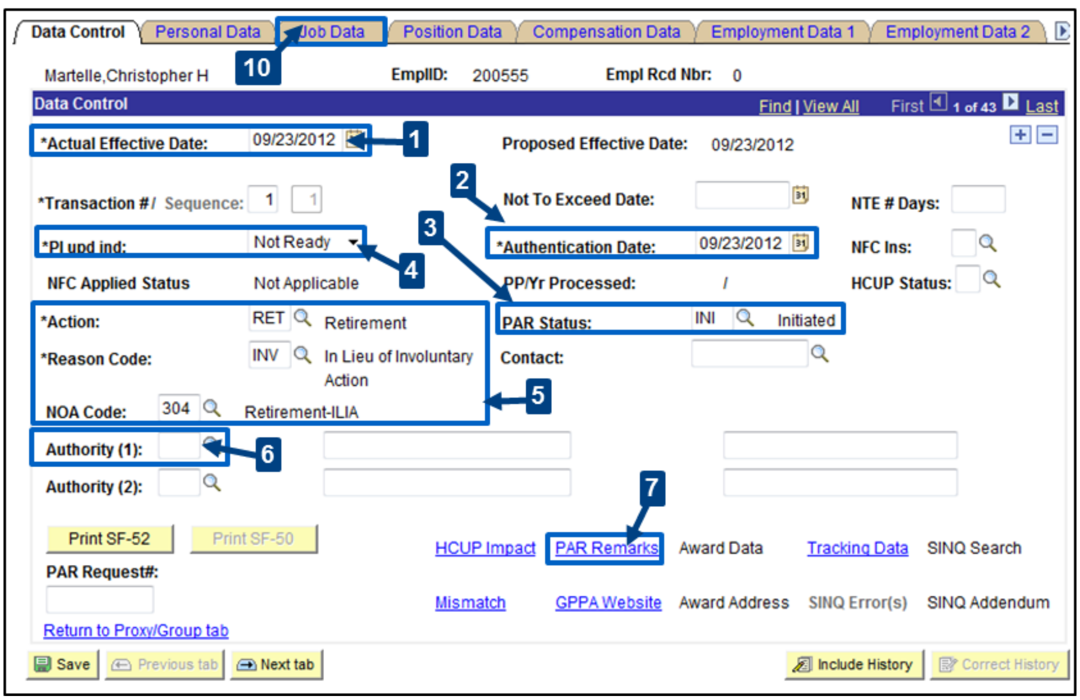
AUTHORIZING & PROCESSING A RETIREMENT IN HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Retirement Action link>Data Control tab***

OR

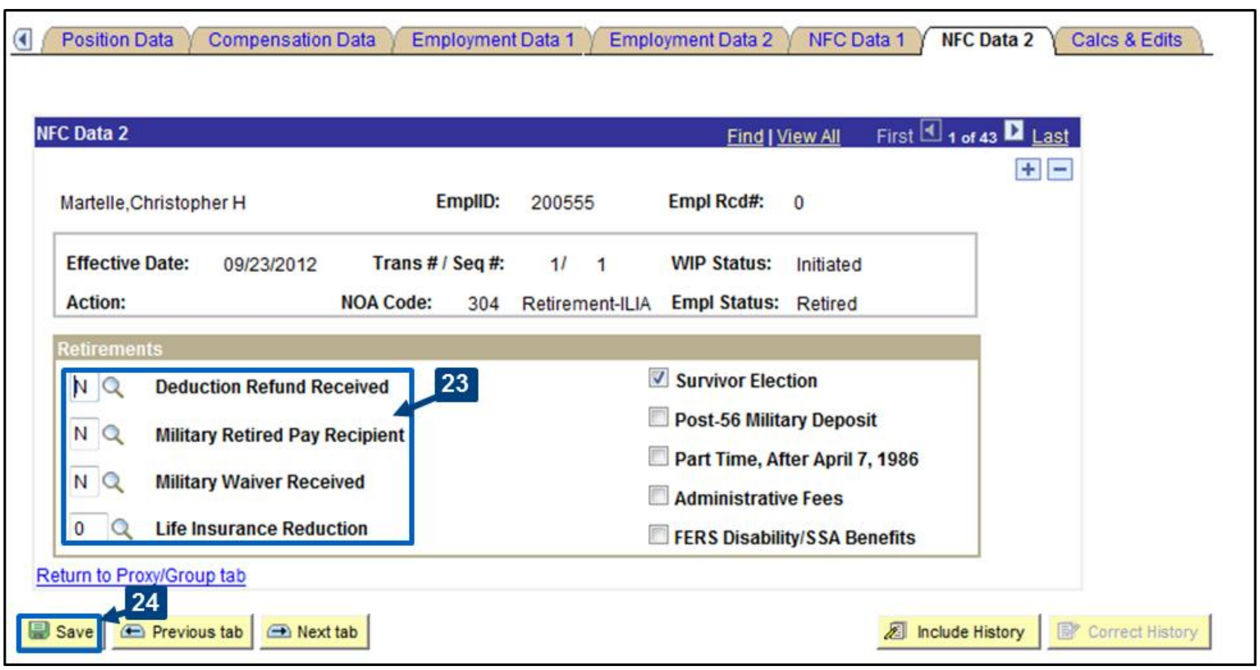
Group Worklist: ***Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Retirement Action link>Data Control tab***

1. Enter or verify the **Actual Effective Date**.
2. Enter or verify the **Authentication Date**.
3. Select or enter the appropriate **PAR Status**.
4. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
5. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
6. Enter or lookup the legal authority in the **Authority (1)** field.
7. Select the **PAR Remarks** link.
8. On the **PAR Remarks** page, enter the retiree's **Forwarding Address**. In the appropriate remark row.
9. Select the **OK** button.
10. Select the **Job Data** tab.



Chapter 13 Figure 273: Retirement Action – Data Control Tab

11. On the **Job Data** tab, verify that the **Transferred To Agency** field is correct (i.e., 5A – Retirement).
12. Enter the appropriate **Classification Action Code**.
13. Select the **Benefits/FEHB** link.
14. On the **Benefits/FEHB Data** page, enter the **Project Sick Leave Usage Dt** if applicable.
15. Select the **OK** button.
16. Select the **Employment Data 2** tab.
17. Select the **Non Pay Data** link.
18. On the **Non Pay Data** page, verify the **Last Date Worked**.
19. Select the **OK** button.
20. Select the **NFC Data 1** tab.
21. On the **NFC Data 1** tab, enter or lookup the **Leave Earning Status**.
22. Select the **NFC Data 2** tab.
23. On the **NFC Data 2** page, verify the information in the following fields:
    a. **Deduction Refund Received**
    b. **Military Retired Pay Recipient**
    c. **Military Waiver Received**
    d. **Life Insurance Reduction**
24. Select the **Save** button.



Chapter 13 Figure 274: Retirement Action - NFC Data 2 Tab

25. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.

26. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **NFC Data 2** tab).

13.19 Return to Duty

Overview

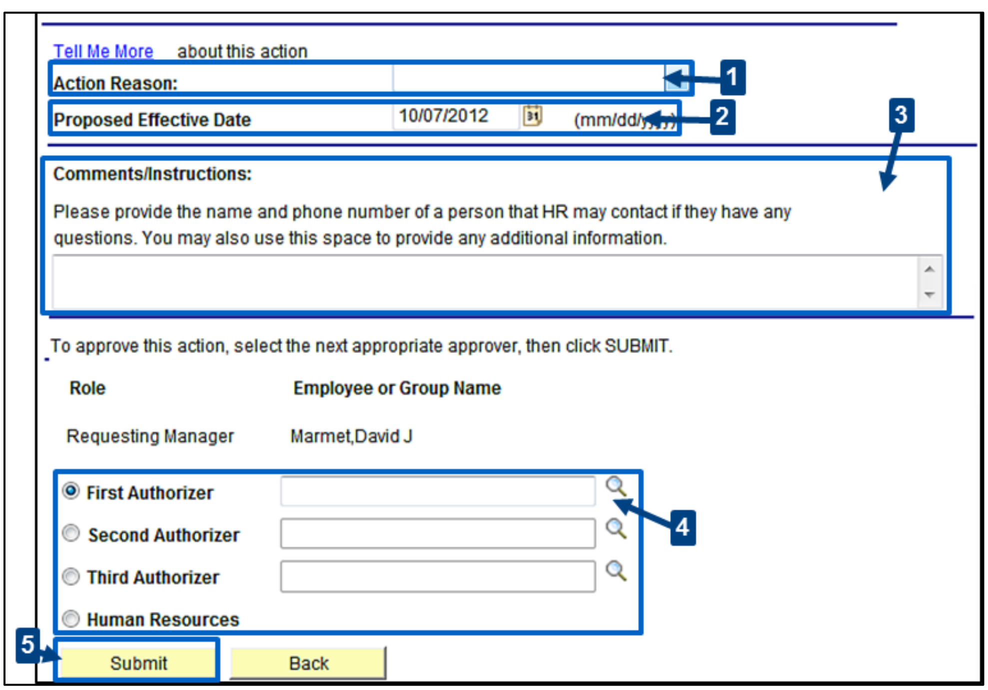
A Return to Duty action is one in which an employee returns to their position following a leave of absence (e.g., return from Leave Without Pay [LWOP] or Suspension/Furlough [REC]). While the reason for the leave of absence may vary, the steps for initiating, approving, and processing a return to duty action are the same. A return to duty may be initiated via MSS or HRSS, and will then be approved and processed via HRSS.

To initiate, authorize, and process a separation:

Initiating a Return to Duty Action in MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet>Return to Duty (LWOP or Other) link>Return to Duty page

1. Select the appropriate **Action Reason**.
2. Enter or select the **Proposed Effective Date**.
3. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** who can be contacted for this action (e.g., your name).
4. Enter or lookup the appropriate **Authorizer**.
5. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 275: Return to Duty – MSS Request

Authorizing & Processing a Return to Duty Action in HRSS

***Individual Worklist:** HR tab>Worklist pagelet>Return to Duty Action link>Data Control tab*

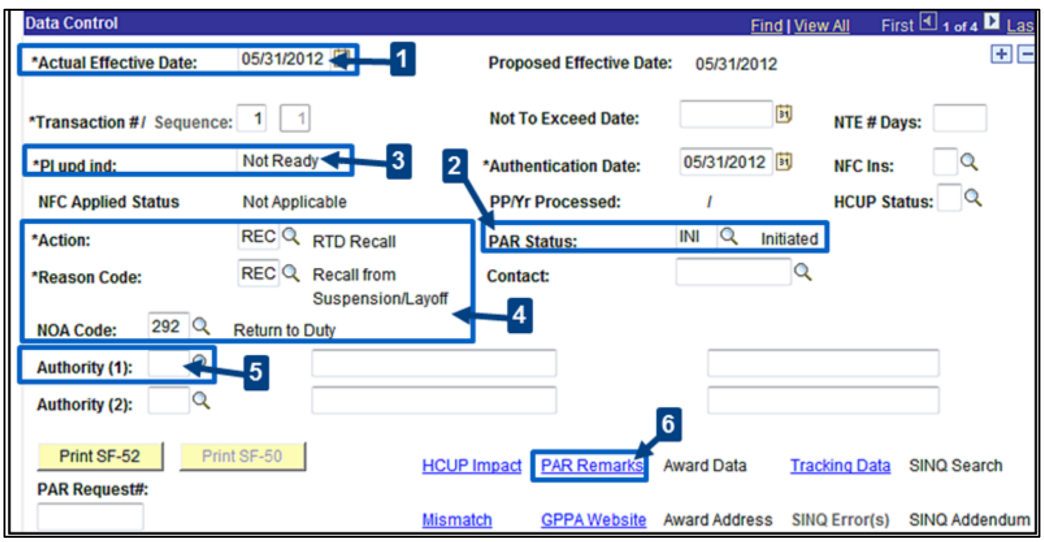
OR

***Group Worklist:** Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Return to Duty Action link>Data Control tab*

1. Enter or select the **Actual Effective Date**.
2. Select or enter the appropriate **PAR Status**.
3. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

> **Note:** For additional Remarks, select the add row (**+**) button & repeat Steps 7-8 as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select the **NFC Data 1** tab.



Chapter 13 Figure 276: Return to Duty – Data Control Tab

11. On the **NFC Data 1** tab, enter the **Leave Earning Status**.
12. Select the **Save** button.
13. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
14. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **NFC Data 1** tab).

13.20 SUSPENSION

OVERVIEW

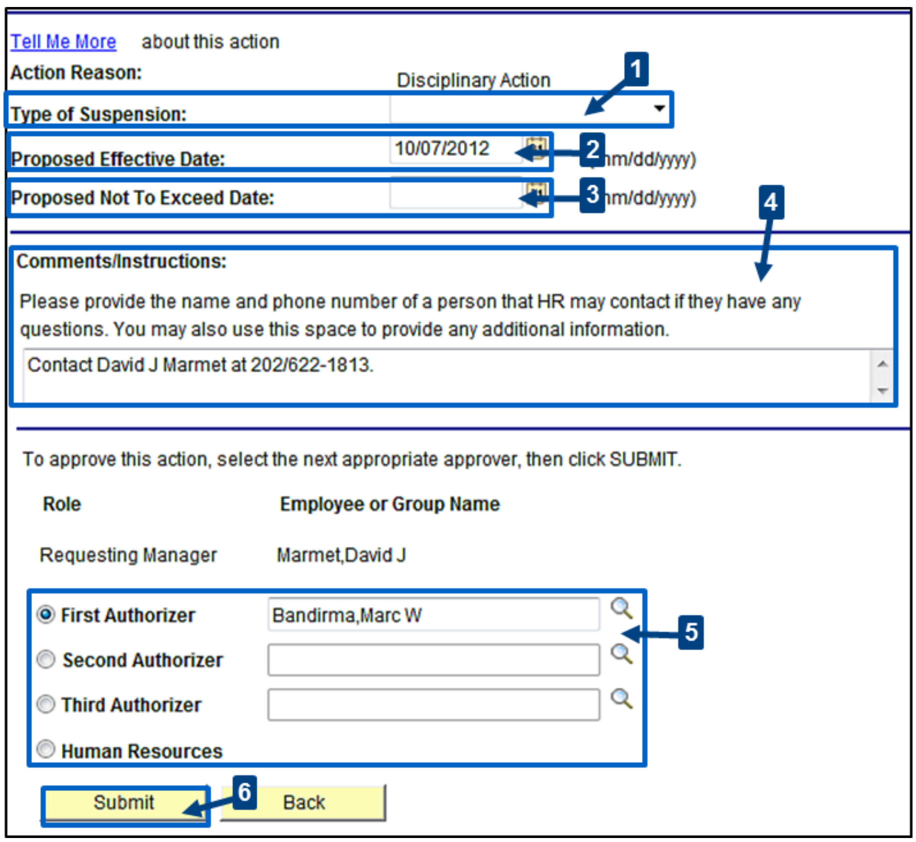
A Suspension action is one in which an employee is temporarily placed on unpaid leave for disciplinary reasons. While the disciplinary reasons for, and length of, a suspension can vary, the steps for initiating and processing such an action are the same. A suspension is initiated via MSS and then authorized and processed via HRSS.

To initiate, authorize, and process a suspension:

INITIATING A SUSPENSION IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet>Suspension link>Suspension page

1. Select the **Type of Suspension**.
2. Enter or select the **Proposed Effective Date**.
3. (Optional) Enter or select the **Proposed Not To Exceed Date**.
4. In the **Comments/Instructions** field, enter your **Name** and **Phone Number**.
5. Enter or lookup the appropriate **HR Authorizer**.
6. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 277: Suspension – MSS Request

Authorizing and Processing a Suspension in HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Suspension Action link>Data Control tab***

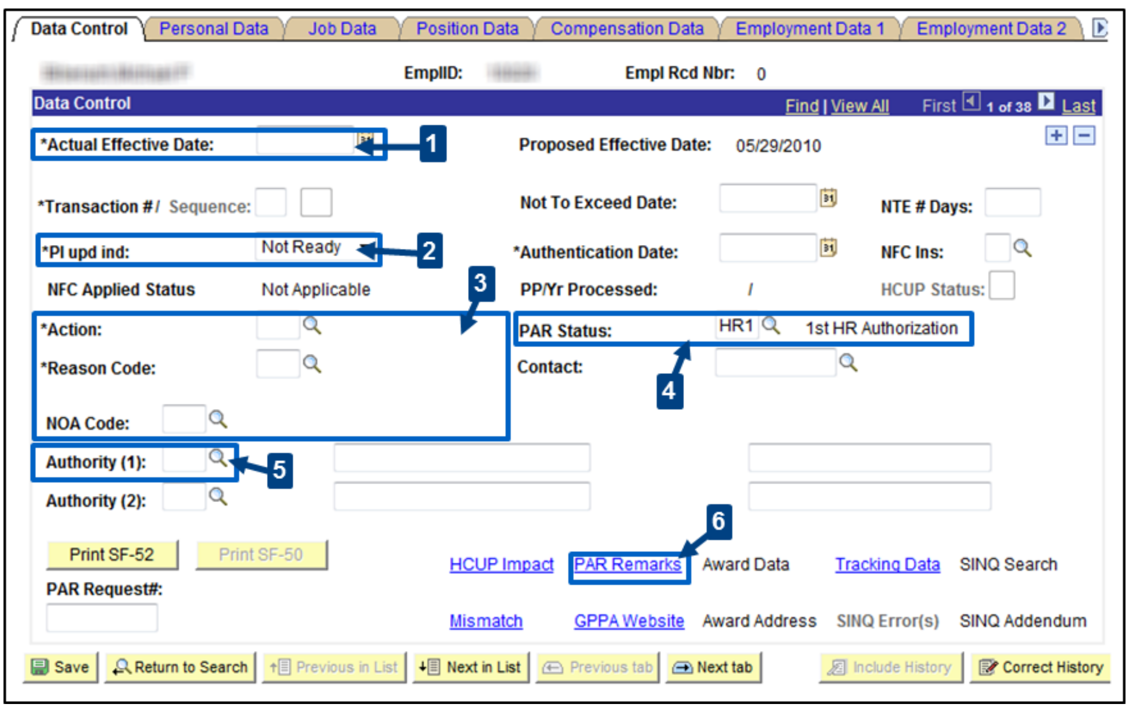
OR

Group Worklist: ***Proxy/Group tab>Group Worklists pagelet>Group Worklist for: link>Suspension Action link>Data Control tab***

1. Enter or select the **Actual Effective Date**.
2. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
3. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
4. Select the appropriate **PAR Status**.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

Note: For additional Remarks, select the add row (**+**) button & repeat **Steps 7-8** as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select the **NFC Data 1** tab.



Chapter 13 Figure 278: Suspension Action – Data Control Tab

11. On the **NFC Data 1** tab, enter the **Leave Earning Status**.
12. Select the **Save** button.
13. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
14. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **NFC Data 1** tab).

13.21 TERMINATION OF TEMPORARY PROMOTION/DETAIL

OVERVIEW

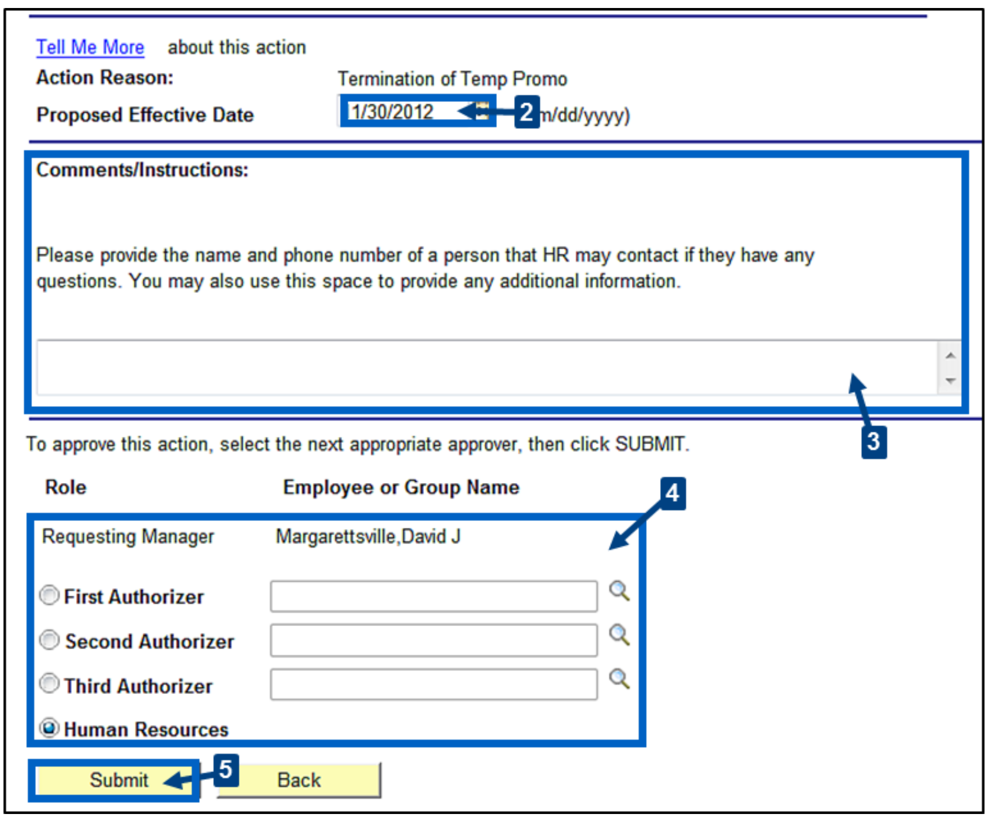
A Termination of Temporary Promotion or Detail action is performed when a temporary promotion or detail ends prior to the originally anticipated end date. This action may be initiated by an MSS or HRSS user, but requires processing by an HRSS user. This section demonstrates the procedure for ending a Temporary Promotion or Detail. Since the procedure for both actions is the same, this section uses Temporary Promotion as an example.

To initiate, authorize, and process a Termination of Temporary Promotion OR Detail action:

INITIATING A TERMINATION OF TEMPORARY PROMOTION OR DETAIL IN MSS

Manager tab>People and Positions pagelet>Employee Name link>Personnel Actions pagelet

1. Select the **Termination of Temporary Promotion** link (or **Termination of Detail** link).
2. On the **Termination of Temporary Promotion** page (or **Termination of Detail** page), enter or select the **Proposed Effective Date**.
3. In the **Comments/Instructions** field, enter the **Name** and **Phone Number** of an individual who can be contacted for this action (e.g., your name).
4. Enter or lookup the appropriate **Authorizer**.
5. Select the **Submit** button. (A confirmation message will display. Select the **OK** button to return to your Home Page.)



Chapter 13 Figure 279: Termination Of Temporary Promotion Page

Processing a Termination Of Temporary Promotion in HRSS

Individual Worklist: ***HR tab>Worklist pagelet>Personnel Action link>Data Control tab***

OR

Group Worklist: ***Proxy/Group tab>Group Worklist pagelet>Group Worklist link>Personnel Action link>Data Control tab***

1. Verify the **Actual Effective Date**.
2. Enter or lookup the appropriate **PAR Status**.
3. (If PAR Status = HR): In the **PI upd ind** dropdown menu, select **Ready**.
4. Verify that the **Action**, **Reason Code**, and **NOA Code** fields are correct.
5. Enter or lookup the legal authority in the **Authority (1)** field.
6. Select the **PAR Remarks** link.
7. Enter or lookup the appropriate **Remark CD**.
8. Enter any necessary information in the remark rows.

> **Note:** For additional remarks, select the add row (**+**) button & repeat Steps 7-8 as necessary. To remove a remark select the remove row (**-**) button.

9. Select the **OK** button.
10. Select **Job Data** tab.
11. On the **Job Data** tab, enter or lookup the appropriate **Classification Action Code**.
12. Select the **Save** button.
13. (If PAR Status = HR1-HR3): On the **Route to Next Empl ID** page, enter or lookup the next **HR Authorizer**.
14. (If PAR Status = HR1-HR3): Select the **OK** button. (This will take you to the **Job Data** tab).

Chapter 14: Reporting

14.1 Overview

In HR Connect, it is possible to generate a variety reports. Access to reports is dependent on your role within the system. These reports are divided into three sections based on whether they are unique to MSS Users (**Unique Manager Tab Reports**), unique to HRSS users (**Unique HR Tab Reports**), and reports that are available to both MSS and HRSS users (**Manager & HR Tab Shared Reports**).

The purpose of this section is to provide a descriptive list of all reports available to MSS and HRSS users in HR Connect.

14.2 Manager & HR Tab Shared Reports

The following reports are available in both the **Reports** pagelet on the **Manager** tab and the **Bureau Reports** pagelet on the **HR** tab:

- **Emergency Contacts.** View or print a tabulated list of emergency contacts for your direct reports or all employees in your immediate organization. You may also conduct an Emergency Contact Coordinator Search.
- **NTE Date Report.** The **NTE** (Not To Exceed) **Date Report** generates a list of temporary actions with NTE dates expiring within a specified timeframe for individual employees, all employees, or your direct reports.
- **Pending Actions Report.** View a tabulated list of pending actions for all employees, individual employees, or your direct reports.
- **Pending and Processed Actions.** View or print the status of actions taken on an individual employee within a specified timeframe.
- **Individual Pending and Processed Awards Report.** Generate a report on individual awards granted to all employees or direct reports within a specific timeframe.
- **Group/Mass Awards.** Generate a report on group/mass awards granted to employees within a range of effective dates. This report differs slightly across tabs, as the Manager's report is titled **Group/Mass Pending and Processed Awards** and includes filters by award type for all employees or direct reports.

The following report is available in both the **Manager Tools** pagelet on the **Manager** tab and the **HR Documents** pagelet on the **HR** tab:

- **Print Position Description.** View or print a report of characteristics (e.g., Grade, Pay Basis, Major Duties, etc.) associated with a Position Description/Job Code.

14.3 Unique Manager Tab Reports

The following reports are only available in the **Reports** pagelet on the **Manager** tab.

- **Alphabetical Roster.** View a roster of your direct reports or all employees in your immediate organization including the employee's Name, Title, Pay Plan, Salary, Grade Date, Service Date, and Organization.
- **Birthday Report.** View a tabulated list of birthdays for your direct reports or all employees in your immediate organization. The report may be filtered to include only birthday's within a given month.
- **Employee Leave Report.** View or print a tabulated list of leave balances (e.g., Sick Leave, Time Off Balance, etc.) for your direct reports or all employee's in your immediate organization.
- **Employee Location Report.** View a tabulated list of addresses, linked to a list of employee's at that given location, for your direct reports or all employees in your immediate organization. The report may be filtered to include only employees at a given location.
- **Performance Appraisal Summary Report.** View a tabulated list of performance appraisal results (i.e., Review Period, Last Performance Appraisal, OPM Rating, and Due Date) attributed to your direct reports or all employees within your immediate organization.
- **Recruitment Requests Pending Manager Review.** View the status of pending requisition requests matching given search criteria (i.e., Request #, Official Position Title, Occupational Series, Pay Plan, and/or Salary Grade).
- **Financial Disclosure Report.** View the status of financial disclosure forms for your direct reports or all employees within your immediate organization.

14.4 Unique HR Tab Reports

The following reports are only available in the **Reports** pagelet on the **HR** tab:

- **Duplicate Actions Report.** Generate a report of all actions taken within a given timeframe with the same NOA (Nature of Action) Code. This report may also be filtered by Organization and Personnel Office ID.
- **HCUP On Hold Report.** View or print a tabulated list of all HCUP packages that match given search criteria (i.e., EPIC User ID, Pay Period, Pay Year, HCUP Package Status, On Hold Reason, Employee ID, and Employee's First and Last Name).
- **HCUP Status Report.** View or print a tabulated list of HCUP Packages Summaries, Underlying PAR Actions, Future PAR Actions Not Updated by HCUP, and/or HCUP Packages Needing Review. This report may be filtered based on given search criteria (i.e., EPIC User ID, Pay Period, Pay Year, HCUP Package Status, On Hold Reason, Employee ID, and Employee's First and Last Name).
- **PI Auto Action Error Report.** Generate a report of inbound interface actions that were **NOT** inserted into HR Connect within a given timeframe. This report may be filtered by POI office.

- **PI Auto Action Insert Report.** Generate a report of inbound interface actions that were inserted into HR Connect within a given timeframe. This report may be filtered by POI office.
- **PI Auto N Action Report.** Generate a report of all inbound payroll interface actions requiring manual modification (**NFC Insert Indicator = N**) within a given timeframe. This report may be filtered by POI office.
- **PI Auto Action Report.** Generate a report of all inbound payroll interface actions within a given timeframe. This report may be filtered by POI office.
- **PI Pay Document Report.** Generate a report of all inbound payroll interface pay document transaction errors within a given timeframe. This report may be filtered by POI office.
- **SF-50 Notification Error Report.** Generate a report of all existing SF-50 (Notification of Personnel Action) errors. This report may be filtered by POI office.
- **SINQ Document Type Count Rpt.** Generate a report on the number of SINQ errors per document type within a given timeframe. This report may be sorted by sub-agency, POI, and document type.
- **SINQ Error Message Count Rpt.** Generate a report on the number of unique error messages per document type within a given timeframe. This report may be sorted by sub-agency, POI, document type, and error code.
- **SINQ Summary by User ID Rpt.** Generate a report of SINQ errors by User ID within a given timeframe. This report may be sorted by sub-agency, POI, and document type.