



University of Connecticut

Employee Data Changes: General Data Changes

Overview

Department Processors and HR Processors have the ability to make various data change to an employee’s data, including: FTE, Job End Date, End of Probationary Period, Supervisor ID and Location.

There are **seven** Smart HR templates Department Processors or the HR Department will use to maintain an employee’s general data. These seven are:

Template ID	Description	Who Uses It
UC_TBH_DC_STUD_DAT	Student Data / Pay Change	Department Processor
UC_TBH_DC_GRAD_DAT	Graduate Payroll Data Changes	Department Processor
UC_TBH_DC_CLAS_DEP	Classified Data Change – Dept. Initiated	Department Processor
UC_TBH_DC_CLAS_HR	Classified Data/Pay Change – HR Initiated	HR Department
UC_TBH_DC_U_DATA_D	Unclassified Data Change – Dept. Initiated	Department Processor
UC_TBH_DC_SPNT_PAY	Special Payroll Non-Teaching Pay Change	Department Processor
UC_TBH_DC_SPT_PAY	Special Payroll Teaching Pay Change	Department Processor

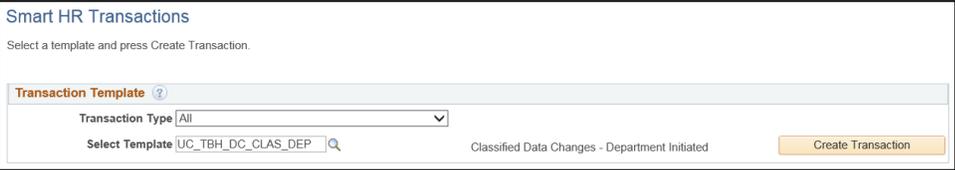
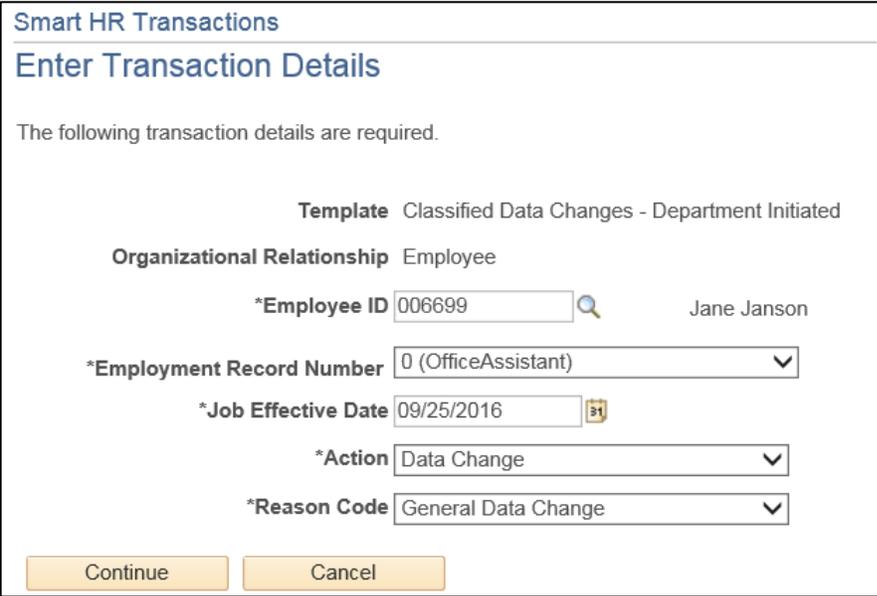
It is recommended to use a general data change template when changing multiple pieces of information at once. For example, a Department Processor can change the Location Code, Funding Information, Stipend Amount and Course Information at the same time using the **US_TBH_DC_SPT_PAY** template.

This job aid walks through the steps to complete the following three general data changes:

- Classified Part-Time and Standard Hours Change
- Unclassified Status (Employee Classification) Change
- Special Payroll General Data Change

Process Steps: Classified FTE and Standard Hours Change

Scenario: A classified employee is changing from full time to part-time. The Department Processor must update the Full/Part Time and Standard Hours fields accordingly.

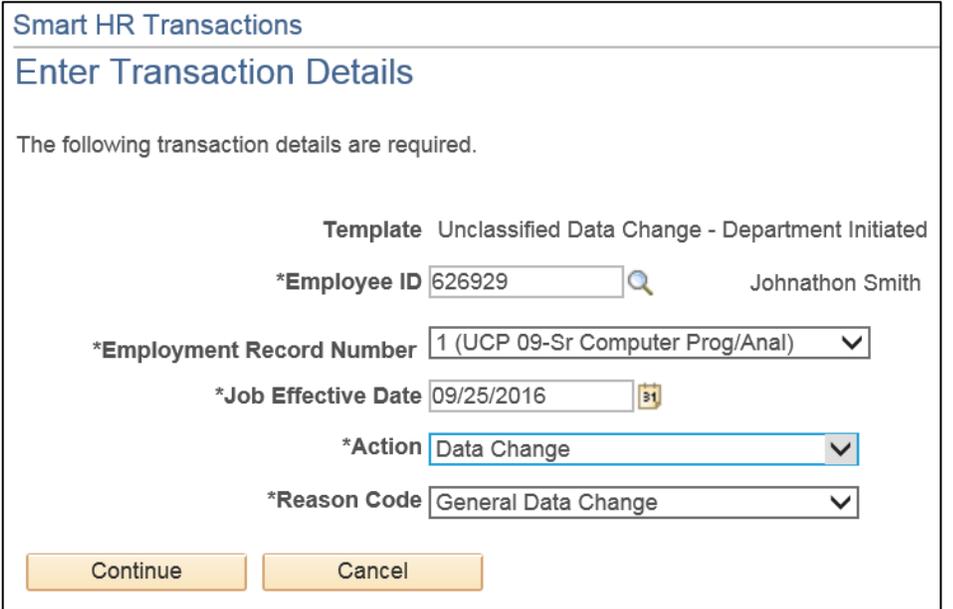
Step	Action	Screenshot
1	Navigation: Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Smart HR Transactions	
2	<p>On the Smart HR Transactions page, select the following:</p> <ul style="list-style-type: none"> • Transaction Type: All • Select Template: UC_TBH_DC_CLAS_DEP <p>Click Create Transaction.</p>	
3	<p>On the Enter Transaction Details page, enter the following:</p> <ul style="list-style-type: none"> • Employee ID: Enter the employee's ID number. If unknown, use the magnifying glass to search for the employee. • Employment Record Number: If the employee has multiple jobs, ensure the correct employee record number is selected. • Job Effective Date: This will auto-populate to the current date. Update if necessary. • Action: This will auto-populate to <i>Data Change</i>. Keep as is. • Reason Code: Select a reason code. In this example, select <i>General Data Change</i>. <p>Click Continue.</p>	

Step	Action	Screenshot
4	<p>Most of the information on the Enter Transaction Information page will auto-populate.</p> <p>Most of the fields that have auto-populated data can be updated on this template at any time. The fields that are greyed-out are ready only and cannot be edited.</p> <p>In this example, the employee is changing from full time to part-time, and her standard hours are decreasing from 40.0 to 20.0.</p> <p>Under the Job Information – Status section, update the following fields:</p> <ul style="list-style-type: none"> • Full/Part Time: Select Part-Time. <p>Under the Job Information – Standard Hours section, update the following field:</p> <ul style="list-style-type: none"> • Standard Hours: Update the hours to 20.0 <p>If your department’s business process requires it, enter additional information in the form of comments in the Comments section.</p>	
5	<p>When all information is entered and accurate, click Save and Calculate at the bottom of the template.</p>	

Step	Action	Screenshot
6	<p>At the bottom of the template, an Attachment section will open.</p> <p>If applicable, search for and attach an attachment to include with the data change.</p> <p>Click the plus sign (+) to add additional attachments.</p>	
7	<p>When all information on the template is complete, click Submit to route the data change template to the department's Smart HR Approver for approval.</p>	

Process Steps: Unclassified Status (Employee Classification) Change

Scenario: An unclassified employee has completed his probation period. The Department Processor must update the employee’s classification (status) to permanent.

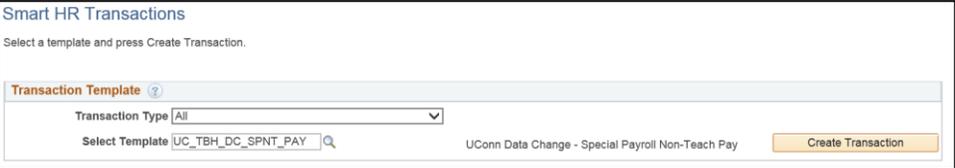
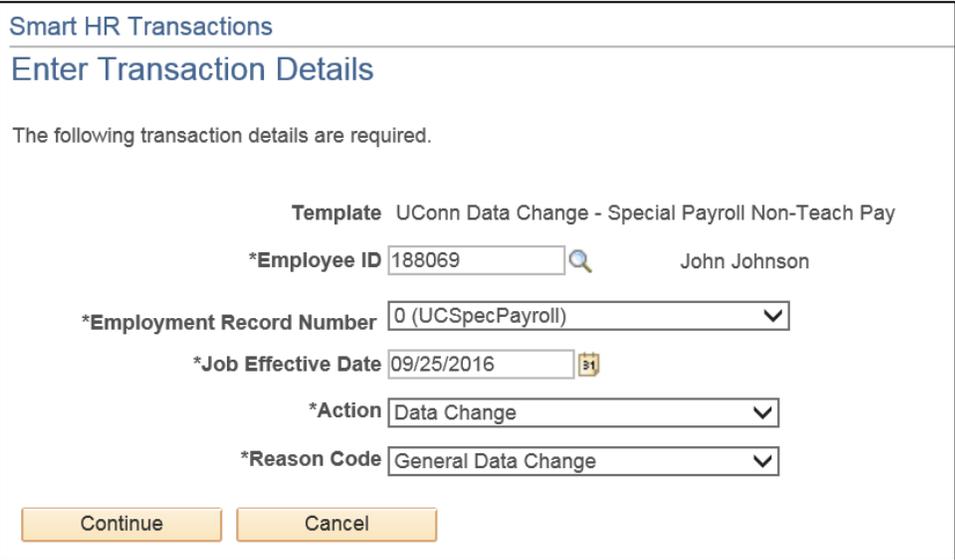
Step	Action	Screenshot
1	Navigation: Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Smart HR Transactions	
2	<p>On the Smart HR Transactions page, select the following:</p> <ul style="list-style-type: none"> • Transaction Type: All • Select Template: UC_TBH_DC_U_DATA_D <p>Click Create Transaction.</p>	
3	<p>On the Enter Transaction Details page, enter the following:</p> <ul style="list-style-type: none"> • Employee ID: Enter the employee’s ID number. If unknown, use the magnifying glass to search for the employee. • Employment Record Number: If the employee has multiple jobs, ensure the correct employee record number is selected. • Job Effective Date: This will auto-populate to the current date. • Action: This will auto-populate to <i>Data Change</i>. Keep as is. • Reason Code: Select a reason code. In this example, select <i>General Data Change</i>. <p>Click Continue.</p>	

Step	Action	Screenshot
4	<p>On the Enter Transaction Information page, most of the data auto-populates. The fields that are greyed out are read-only and cannot be updated.</p> <p>In this example, the employee has completed their probationary period. The Department Processor must update the employee classification from probationary to permanent.</p> <p>Under the Job Information – Employee Classification section, update the following fields:</p> <ul style="list-style-type: none"> • Employee Classification: Select PP – Permanent <p>If your department’s business process requires it, enter additional information in the form of comments in the Comments section.</p>	<p>The screenshot shows the 'Enter Transaction Information' form with the following sections:</p> <ul style="list-style-type: none"> UNCL - Data Chg Dept Work Location - Job Fields: *Department UOC01546, *Location Code UOC000074, Establishment ID UOC001 Job Information - Job Code: *Job Code AX9089 Job Information - Status: *Full/Part Time Full-Time Job Information - Employee Classification (highlighted): *Employee Classification PP - Permanent Job Information - Standard Hours: Standard Hours 35.000000, FTE 1.000000 Job Labor - Bargaining Unit and Labor Agreement: Bargaining Unit UNCL Job Compensation - Pay Components: *Comp Rate Code CTBASE, Compensation Rate 3096.700000, Currency Code USD, Compensation Frequency BCT UConn Dates: Table with columns Date Code, Start Date, End Date. Row 1: UOC Job Expected Date, 03/25/2016, 09/25/2016. UConn Payroll Distribution: Table with columns Account Number, Sub Account Number, Distribution Percentage. Row 1: 2740000, [blank], 100.000000. Other Job Data: Appointment Term, RS Job Opening ID, RS Position Number, Tenure Year, Work Dept/Non-Academic. Comments: Text area for comments.
5	<p>When all information is entered and accurate, click Save and Calculate at the bottom of the template.</p>	<p>The screenshot shows the bottom of the form with the following buttons:</p> <ul style="list-style-type: none"> Return to Enter Transaction Details Page Save for Later Cancel Save and Calculate

Step	Action	Screenshot										
6	<p>At the bottom of the template, an Attachment section will open.</p> <p>If applicable, search for and attach an attachment to include with the employee classification change.</p> <p>Click the plus sign (+) to add additional attachments.</p>	 <p>The screenshot displays an 'Attachment' section with a table. The table has the following structure:</p> <table border="1"> <thead> <tr> <th data-bbox="586 352 873 386">*Description</th> <th data-bbox="873 352 1159 386">Attached File</th> <th data-bbox="1159 352 1256 386">Attach</th> <th data-bbox="1256 352 1338 386">Open</th> <th data-bbox="1338 352 1507 386">Delete</th> </tr> </thead> <tbody> <tr> <td data-bbox="586 386 873 426">1 <input type="text"/></td> <td data-bbox="873 386 1159 426"></td> <td data-bbox="1159 386 1256 426">Attach</td> <td data-bbox="1256 386 1338 426">Open</td> <td data-bbox="1338 386 1507 426">Delete</td> </tr> </tbody> </table> <p>Additional UI elements include a search bar, 'View All', and navigation controls (First, 1 of 1, Last) at the top right of the attachment list.</p>	*Description	Attached File	Attach	Open	Delete	1 <input type="text"/>		Attach	Open	Delete
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1 <input type="text"/>		Attach	Open	Delete								
7	<p>When all information on the template is complete, click Submit to route the data change template to the department's Smart HR Approver for approval.</p>											

Process Steps: Special Payroll General Data Change

Scenario: A Special Payroll employee recently transferred into your department, and the employee’s location, supervisor and funding information needs to be updated to reflect the current department’s information.

Step	Action	Screenshot
1	Navigation: Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Smart HR Transactions	
2	<p>On the Smart HR Transactions page, select the following:</p> <ul style="list-style-type: none"> • Transaction Type: All • Select Template: UC_TBH_DC_SPNT_PAY <p>Click Create Transaction.</p>	
3	<p>On the Enter Transaction Details page, enter the following:</p> <ul style="list-style-type: none"> • Employee ID: Enter the employee’s ID number. If unknown, use the magnifying glass to search for the employee. • Employment Record Number: If the employee has multiple jobs, ensure the correct employee record number is selected. • Job Effective Date: This will auto-populate to the current date. Update if necessary. • Action: This will auto-populate to <i>Pay Rate Change</i>. Update to <i>Data Change</i>. • Reason Code: Select a reason code. In this example, select <i>General Data Change</i>. <p>Click Continue.</p>	

Step	Action	Screenshot
4	<p>Most of the information on the Enter Transaction Information page will auto-populate.</p> <p>Most of the fields that have auto-populated data can be updated on this template at any time. The fields that are greyed out are ready only and cannot be edited.</p> <p>In this example, the employee recently transferred into a new department, and the receiving department's Department Processor is performing a general data change to update the Location Code, Supervisor ID and funding Account Number.</p> <p>If your department's business process requires it, enter additional information in the form of comments in the Comments section.</p>	
5	<p>When all information is entered and accurate, click Save and Calculate at the bottom of the template.</p>	
6	<p>At the bottom of the template, an Attachment section will open.</p> <p>If applicable, search for and attach an attachment to include with the department change.</p> <p>Click the plus sign (+) to add additional attachments.</p>	

Step	Action	Screenshot
7	When all information on the template is complete, click Submit to route the data change template to the department's Smart HR Approver for approval.	