



# Personnel Administration Actions HR\_PA\_310



UK UNIVERSITY OF KENTUCKY

## Course Content



- Introduction
- Unit 1 - Overview
- Unit 2 - Hiring
- Unit 3 - Additional Assignment
- Unit 4 - Change of Assignment
- Unit 5 - Leave of Absence
- Unit 6 - Change in Base Pay
- Unit 7 - Workers Compensation
- Unit 8 - Separation and Retirement
- Course Summary



UK UNIVERSITY OF KENTUCKY

HR\_PA\_310 Personnel Administration Actions (v11)

2

## Prerequisites and Roles



- Prerequisites
  - ♦ UK\_100 IRIS Awareness & Navigation
  - ♦ HR\_200 Human Resources Overview
  - ♦ HR\_PA\_300 Personnel Administration
- Roles
  - ♦ Business Officers
  - ♦ Personnel Administrators

## Course Learning Objectives



- Review terms associated with Personnel Administration Actions as related to the University of Kentucky
- Understand the IRIS Actions process
- Perform Personnel Actions in IRIS





# Overview

## HR Security

- HR Security roles in IRIS Production allow you to view HR data within your area of responsibility only.
- You can search for an employee in the system if you are hiring, such as for an additional assignment.
- Access is limited to infotypes needed to fulfill your role.
  - ♦ Example: You may have access to an employee's HR Master Record within your organizational unit, but not to certain Benefits or Payroll infotypes, such as Health Plans (0167) or Bank Details (0009).
- Access also may be limited to Display only, such as Residence Status (0094).
- Training Sandbox does not have security roles, so you have greater access there.



## Key Terminology



Terminology	Definition
Infotype	A <b>screen</b> that is used to store data related to IRIS HR, such as the Organizational Assignment (0001) or Basic Pay (0008)
Action	A <b>series of infotypes</b> or screens that appear automatically in the correct sequence for data entry, to complete an HR process
Delimit	To <b>End</b> (but NOT delete) a record by shortening its validity period
Payroll Authorization Record (PAR)	This is the paperwork describing an action that has been entered in an employee's Master Record in IRIS; after obtaining the authorization signatures and attaching appropriate documentation, you send 2 copies of the PAR to Compensation.

## Key Terminology



Terminology	Definition
Payroll Area	Provides the payroll driver with the Employee number and dates of the payroll period ( <b>Monthly</b> or <b>Biweekly</b> )
Personnel Area	Area where employed within the University (Ex: Main Campus, Hospital)
Personnel Subarea	Further division of the Personnel Area (Ex: Regular FT, Regular PT, Temp PT <. 20)
Employee Group	Type of employee in the organization (Ex: Staff, Faculty, Student, etc.)
Employee Subgroup	Further division of the Employee Group (Ex: Exempt Monthly, Non-Exempt 37.5 hour, Non-Exempt 40 hour, etc.)

## Key Terminology



Terminology	Definition
Person ID	<p>The unique eight-digit number assigned to an employee by IRIS during the New Hire action, to be used for identification purposes instead of the Social Security number (you can still search on SSN, however).</p> <p>→ This number will NOT change</p>
Personnel Number (PerNr)	<p>Each personnel assignment is uniquely identified in IRIS by the PerNr (pronounced PerNer). Generally you keep the same PerNr when you change assignments and receive another PerNr when you add an assignment.</p> <p>→ This number MAY change</p>

## Person ID and Personnel Number (PerNr)



- If an employee's records were converted to the IRIS system when the system went live (April 1, 2006),
  - ♦ the Person ID will begin with a zero (0), and
  - ♦ the Personnel Number (PerNr) will be the same as the Person ID.
  - ♦ Example: George Smithfield - Person ID=00012879 and PerNr=00012879
- An Employee hired after the system went live will have:
  - ♦ a Person ID that begins with a one (1), and
  - ♦ a Personnel Number (PerNr) that begins with a zero (0).
  - ♦ Example: Agnes Witherspoon - Person ID=10025645 and PerNr=00011498

## Person ID and Personnel Number (PerNr)



**Person ID**  
(unique; number  
does not change)

**PerNr**  
(related to assignment;  
one PerNr per assignment)

Person ID	0014547	Pers.Assgn	00013029 50127718 00013029...
Name	Aaron W Trull	Empl. %	100.00
EE group	B Students	Pers.area	1000 Main Camp
EE subgroup	09 Student	Pers. subarea	0007 Temp PT >
Start	04/25/2006		

**Position Number**  
(starts with a 5)

## Personnel Actions Screen - PA40



**Personnel Actions**

Find by: Person

Person ID: [field] Pers.Assgn: [field]

Start: [field]

**Object Manager**

**Start date field**

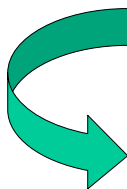
**Actions**

Action Type		
Main Campus Create Assignment		
Hospital Create Assignment		
Position Update		
Change in Status		
FTE Change		
Separation		
End of Additional Assignment		
Reactivate Add Assignment		
Hospital Position Update		
LOA with Pay		
LOA without Pay		
Workers' Compensation		
Return From Leave with Pay		
Return From Leave Without Pay		
Long Term Disability I		
Long Term Disability II		
Change in Base Pay		

## PA40 – Tips



- Always start with a clean screen.
  - ♦ If there is a number in the **Person ID** field, **delete it** and any associated information **BEFORE** beginning work on another employee's action.
- Enter the **Start** date of the action **BEFORE** selecting the action.




Person ID	0014547	Pers.Assgn	00013029 50127718 00013029...			
Name	Aaron W Trull	Empl. %	100.00			
EE group	B Students	Pers.area	1000 Main Campus			
EE subgroup	09 Student	Pers. subarea	0007 Temp PT >.20			
Start	04/25/2006					

Person ID		Pers.Assgn				
Start	04/25/2006					

## PA40 – Tips



- Do **NOT** enter anything in the **Person ID** field when executing the Main Campus Create Assignment or Hospital Create Assignment action for a:
  - ♦ New Hire
  - ♦ Rehire/Reinstate
  - ♦ Position Change (Promotion, Transfer, etc.)
  - ♦ Additional Assignment
- Do **NOT** use the Back icon  while working on an action. Using the Back icon will leave the action unfinished.

## Validity Dates



- Each infotype has a begin and end date to identify a validity period.
  - ♦ Records are often identified with an end date of 12/31/9999 - often referred to as the “high date”.

From 11/30/1962 To 12/31/9999

- Some actions produce yellow, warning system messages informing you that records are being delimited (ended).

⚠ Record valid from 08/07/2005 to 12/31/9999 delimited at end

- To move through a warning system message, simply press the Enter key.

## Unit 2



# Hiring



## Unit 2 – Hiring



- New Hire
- Payroll Authorization Record (PAR)
  - ♦ Create a PAR using ZHR\_PAR
  - ♦ Print copies of a PAR
  - ♦ Save a PAR to your computer
- How to Recover from an Interruption
- Rehire/Reinstate

## New Hire Process



- An employee must have completed and signed the I-9 form **ON or BEFORE** their first day of work.
- The I-9 form must be received by the Personnel Administrator **BEFORE** entering the employee into the system using the **Main Campus Create Assignment** action.
- The system will automatically display the necessary infotypes (screens) in the correct sequence for data entry.
- After the employee has been entered into the system and the hiring action has been completed, a Payroll Authorization Record (PAR) must be created, printed (two copies), signed by the authorizing hiring official in the department, attached to any other appropriate documentation, and sent to HR Compensation.

## New Hire Process



- Certain documents should be attached to the two copies of the PAR and sent to Compensation, who will forward the information to Payroll.
- Documents include:
  - ♦ The original, signed I-9
  - ♦ Signed Consent form from the Employment system (OES)
  - ♦ W4/K4
  - ♦ Earned Income Credit (W5/K4E) form, if applicable
  - ♦ Local/City Tax form, if employee either lives outside Fayette County or will work outside Fayette County
  - ♦ Direct Deposit form
  - ♦ Signed Drug Free Workplace form
  - ♦ For faculty, any other forms required by the Provost/Dean's office

## New Hire - PA40



- Make sure the **Person ID** field is **blank**.
  - ♦ If there is a number in the **Person ID** field, **delete it** and any associated information **BEFORE** beginning work on another employee's action.



Person ID	0014547	Pers.Assgn	00013029 50127718 00013029...
Name	Aaron W Tru11	Empl. %	100.00
EE group	08 Students	Pers.area	1000 Main Campus
EE subgroup	09 Student	Pers. subarea	0007 Temp PT >.20
Start	04/25/2006		

Person ID		Pers.Assgn	
Start	04/25/2006		

## New Hire – PA40



1. In the **Start** date field, enter the date that the new hire starts his/her job

Personnel Actions

Action Type	Personn...	EE group	EE subg...
Main Campus Create Assignment			
Hospital Create Assignment			

2. Select **Main Campus Create Assignment**

3. Click on the **Execute** icon on the Application toolbar

## Employee Recognition



4. The Employee Recognition box appears. To see if the person is already in the IRIS system, enter the **SSN** (Social Security Number).

Employee Recognition

Personnel Data

Form of Addr

Last Name

First Name

Date of Birth

Gender  Female  Male  TBD

SSN 555119166

5. Click on the **Continue** icon or press Enter

6. Click on **New Employee**

Query

No employee was found  
Do you want to change the search criteria or hire a new employee?

New Search New Employee

## Employee Recognition



- Why begin with a search for an existing employee?  
Based on the search results, the system will prompt you for the appropriate action.
  - ♦ If you search for the employee and they are **Active**, the system will ask if you want to **Create New Assignment** or **Change** the employee position.
  - ♦ If you search for the employee and they are **not found**, the system will guide you through the **New Hire** process.
  - ♦ If you search for the employee and they are found to be **Separated** from the University, the system will guide you through the **Rehire** process.
  - ♦ Each of these actions begins with a **search** for the employee.

## New Hire Infotypes – PA40



- Main Campus New Hire
  - ♦ Actions (0000); Personal Data (0002); Organizational Assignment (0001); Addresses (0006); Planned Working Time (0007); Basic Pay (0008); Date Specifications (0041); Additional Personal Data (0077); and if Faculty, Contract Elements (0016)
- Hospital New Hire
  - ♦ Actions (0000); Personal Data (0002); Organizational Assignment (0001); Addresses (0006); Hospital Salary (9002); Skills (0024); Planned Working Time (0007); Basic Pay (0008); Date Specifications (0041); Additional Personal Data (0077)

## Actions (0000) Infotype



- The infotypes start to appear, in the correct sequence. The first infotype is **Actions (0000)**.

Though the cursor appears here, do **NOT** enter anything in the **Pers.No.** field. The PerNr will be generated by IRIS as you move through the action.

Do **NOT** change the **Start/to** dates at the top of each infotype. If they are incorrect, you will need to cancel the action and enter the correct **Start** date on the first PA40 screen.

## Actions (0000) Infotype



- It is **VERY** important to select the appropriate **Reason for Action!** The system's responses are based on this selection.

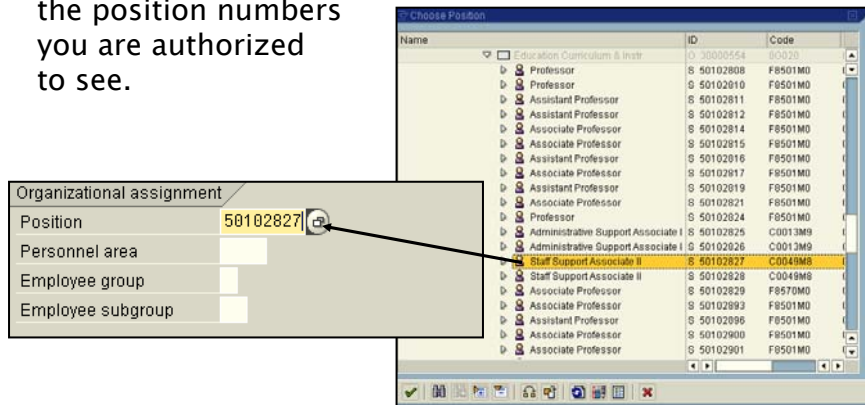
Select the Reason for Action

Ac...	Name of reason for acti...
01	Staff Hire
02	Student Hire
03	STEPS Hire
04	Faculty Hire
05	Post DocHire
06	Police Hire

## Actions (0000) Infotype



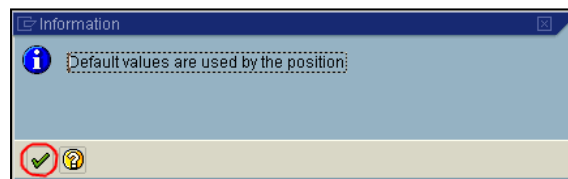
- Next, enter the correct **Position** number! A lot of information automatically derives from this number.
- If you use the Possible Entries icon to do a Structure search, you will see only the position numbers you are authorized to see.



## Actions (0000) Infotype



- After entering the **Position** number, press the Enter key.
- Click on the Continue icon in the **Information** pop-up window. This will bring in default attributes pertaining to this position.



- Click on the Save icon  to complete this infotype.

## Personal Data (0002) Infotype



Person ID: ?\_00029035 Pers.Assgn: 00029035 (Active)

Start: 07/01/2006 To: 12/31/9999

Name

Title: [ ] Name format: [ ]

Last name: [ ]

First name: [ ]

Middle name: [ ]

Suffix: [ ]

Name: [ ]

Known As: [ ]

HR data

SSN: 245-57-8512

Birth date: [ ]

Gender:  Female  Male

Mar. Status: [ ]

On the Personal Data screen, the SSN will populate from the Employee Recognition box you filled in earlier.

Required fields contain a checkmark:

Enter the **Last name**, **First name**, **Middle name** (if known), **Birth date**, and **Gender**.

Avoid creating duplicate IDs – review any pop-up information about a student ID that already exists

## Personal Data (0002) Infotype



Person ID: ?\_00029035 Pers.Assgn: 00029035 (Active)

Start: 07/01/2006 To: 12/31/9999

Name

Title: [ ] Name format: [ ]

Last name: Pendergast

First name: Dwight

Middle name: Edward

Suffix: [ ]

Name: [ ]

Known As: [ ]

HR data

SSN: 245-57-8512

Birth date: 04/16/1976

Gender:  Female  Male

Mar. Status: 1 Marr

You can also specify the **Marital Status**, if known.

Then click on the **Save** icon.

If you chose "Married", the system will then automatically display the Family Member/ Dependents infotype (0021).

## Family Member/Dependents (0021)



Create Family Member/Dependents (0021)

Person ID: 10027211 Pers.Assgn: 00029035

Start: 07/01/2006 To: 12/31/9999

Member: 1 Spouse

Personal data

Last name: Wilson - Pendergast  
First name: Evelyn  
Title: [dropdown]  
Gender:  Female  Male  
Birth date: [dropdown] Ref.pers.no: [dropdown]  
SSN: [dropdown] Telephone number: [dropdown]  
Street: [dropdown] Separation Date: [dropdown]  
Addr Line 2: [dropdown] Marital status: [dropdown]  
City/State: [dropdown]  
Zip/country: [dropdown]

Will appear IF a marital status other than **Single** is selected on the **Personal Data** infotype

Enter the Spouse's name, if known (note: the Last Name defaults to the employee's last name and may need to be changed). Click **Save** to move to the next infotype

If you do not know the spouse's name, click on the **Next Record** icon to proceed  
A message will warn you that data will be lost, but this is all right - click OK to proceed

## Organizational Assignment (0001)



Create Organizational Assignment (0001)

Org Structure

Person ID: 10027211 Pers.Assgn: 00029035

Start: 07/01/2006 to 12/31/9999

Enterprise structure

CoCode: UK00 University of Kentucky  
Pers.area: 1000 Main Campus Subarea: 0001 Reg FT  
Cost Ctr: 1012004590 ED CURR & INST Bus. Area: 0101 UK w/o component units  
Fund: 0011020100 PROVOGT UK GE...  
Orant: 0MNR  
Func. Area: 0110

Personnel structure

EE group: A Staff Pay area: 01 Bi-weekly  
EE subgroup: 00 Non-Exempt 37.5 hour Contract: 40 Office & Cleric

Organizational plan

Percentage: 100.00  
Position: 50102027 C0049M0  
Job key: 40501107 C0049M0  
Exempt: N  
Org. Unit: 30000554 00020  
Org. key: 10001012004590

Administrator

PersAdmin: [dropdown]  
Time: [dropdown]  
PayAdmin: [dropdown]

Press Enter and the values for this infotype will default (populate automatically) based on the **Position** number.

Then click the **Save** icon to proceed to the next infotype.



## Addresses (0006)



**Create Addresses (0006)**

Foreign address

Person ID: 10027211    Pers Assgn: 00029035 50102827 00029035...

Name: Dwight Edward Pendergast

EE group: Staff    Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37...    Pers. subarea: 0001 Reg FT

Start: 07/01/2006    To: 12/31/999

Address type: 1 Permanent residence

c/o: 30000554

Address line 1: 5873 Clays Mill Rd

Address line 2:

City/county: Lexington

State/zip code: KY Kentucky    40504

Country Key: US United States

Telephone number: 859 278-9574

Communications

Type	Number	Extension

Additional fields

County	034	Fayette
Mail code (org unit)	30000554	Education Curriculum & In

Enter only the city, not the county

Enter the address information for the employee, including the **County** of residence.

Click on **Save**.



## Planned Working Time (0007)



**Create Planned Working Time (0007)**

Work schedule

Person ID: 10027211    Pers Assgn: 00029035 50102827 00029035...

Name: Dwight Edward Pendergast

EE group: Staff    Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37...    Pers. subarea: 0001 Reg FT

Start: 07/01/2006    To: 12/31/999

Work schedule rule

Work schedule rule: F12C    7.5 h/w 37.5

Time Mgmt status: 1 1 - Time evaluation of a

Working week: 01 Working Week Sum

Part-time employee

Working time

Dyn. daily work schedule

Employment percent	100.00		
Daily working hours	7.50	Min.	Max.
Weekly working hours	37.50		
Monthly working hrs	162.50		
Annual working hours	1950.00		
Weekly workdays	5.00		

These must relate (see the next slide)

75% would be entered as 75.00

Press Enter to populate the default work schedule information.

Verify the data and click on the **Save** icon.



## Planned Working Time (0007)



NOTE: The Employee's **Personnel Subarea** **MUST** be consistent with the **Employment percent** or an error message will appear.

EE group: A Staff Pers. area: 1000 Main Campus  
 EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT  
 Start: 03/01/2006 To: 12/31/9999  
 Work schedule rule: F11C 8 h/d 40 h/w M-F  
 Time Mgmt status: 99 - Time evaluation of planned times  
 Working week: 01 Working Week Sunday - Saturday  
 Part-time employee  
 Working time: Employment percent: 70.00  Dyn. daily work schedule  
 Daily working hours: 5.60 Min. Max.  
 Annual working hours: 1456.00 Min. Max.  
 Weekly workdays: 5.00 Min. Max.

**Employment percentage range must be between 100.00 and 100.00**

## Basic Pay (0008)



**Create Basic Pay (0008)**  
 Salary amount: Payments and deductions  
 Person ID: 10627211 Pers. Assgn: 00029035 50102827 00029035...  
 Name: Dwight Edward Pendergast Empl. %: 100.00  
 EE group: A Staff Pers. area: 1000 Main Campus  
 EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0001 Reg FT  
 Start: 07/01/2006 To: 12/31/9999  
 Subtype: 0 Basic contract  
 Salary:  
 PS type: 02 Hourly Capacity util. level: 100.00  
 PS area: 01 Main Campus Work hours/period: 75.00 Bi-weekly  
 PS group: 39 Level: 01 Annual salary: 30,128.00 USD  
 Wa... Wage Type Long Text O Amount Curr. L. A. Number/Unit Unit  
 1005 Hourly Rate 15.45 USD  
 IV 07/01/2006 - 12/31/9999 15.45 USD  
 Additional fields  
 True Annual Salary: 30,128.00 Override Salary:

Enter the **Amount** (Hourly Pay Rate, Monthly Salary, or Biweekly Salary), and then press Enter to populate the **Annual Salary** field.

Click on **Save**.



## Date Specifications (0041)



**Change Date Specifications (0041)**

Person ID: 10027211    Pers. Assgn: 00029035 50102827 00029035...


Name: Dwight Edward Pendergast    Empl. %: 100.00

EE group: A Staff    Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37...    Pers. subarea: 0001 Reg FT

Start: 07/01/2006 to 12/31/9999

Date type	Date	Date type	Date
01 Original Hire Date	07/01/2006	02 Current Hire Date	07/01/2006
03 Reg Service Date	07/01/2006	05 Vacation Svc Date	07/01/2006
07 Separation Date	12/31/9999		

Verify that the information is correct and click on the Save icon 

## Additional Personal Data (0077)



**Create Additional Personal Data (0077)**

Person ID: 10027211    Pers. Assgn: 00029035 50102827 00029035...

Name: Dwight Edward Pendergast    Empl. %: 100.00

EE group: A Staff    Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37...    Pers. subarea: 0001 Reg FT

Start: 07/01/2006 to 12/31/9999

**Additional Personal Data**

Ethnic origin: 03 American Indian or Alask...

Race Data

Race Category

Military status: 5 Reserve

**Veteran Status**

Special disabled veteran

Vietnam-era veteran

Other veteran

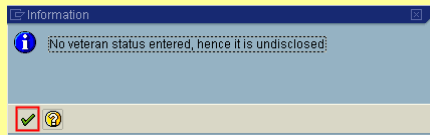
Newly separated veteran

Non-veteran

Choose the appropriate **Ethnic origin**, and then click on the **Save** icon.



Select **Veteran Status** if known. If left blank, this message will appear when saving. Click on green checkmark to close.

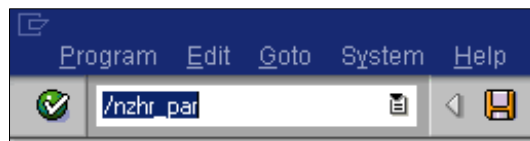




## Create the PAR - ZHR\_PAR



- When you are returned to the original PA40 screen, you are ready to create and print the **PAR (Payroll Authorization Record)**.
- You can also save a copy of the PAR to your computer, if you wish.
- To begin, enter **ZHR\_PAR** in the Command field (or **/nzhr\_par** when you are already in a transaction) and press Enter.



## Create the PAR - ZHR\_PAR



1. The **ZHR\_PAR** transaction code displays the **ZHR\_NEWPAR** screen.
2. Enter the **Start date** of the Action. This **MUST** be the same date you entered in PA40.
3. Enter the employee's **Personnel Number (PerNr)**.
4. Enter any **Comments** as needed.
5. Click the **Execute** icon on the **Standard** toolbar.



Program ZHR\_NEWPAR

Reporting Period: K Key Date 10/12/2006

Selection Criteria: Personnel Number 29043

Comments: Call Mary at 7-7777

## Print the PAR



The Print dialog box appears.

You can now print, or Print Preview and then print.

6. Make sure Print Immediately is checked

7. Change Number of Copies to 2

8. To print, click the Print button

9. To view the PAR, click the Print Preview button

## Prepare the PAR



10. After printing the PAR, obtain the authorizing signature(s) and attach any necessary documentation.

11. Send to Compensation.

## Save the PAR to Your Computer



To save the PAR, you must first click the **Print Preview** button.

The PAR will display on your screen. (Note: You can also print it now by clicking on the **Print** icon.)



**10/12/2006 Tawetta Bird - 10027416**

**Action Information:**  
 Personnel Number: 00020043  
 Period: 10/12/2006 - 12/31/9999  
 Type: Main Campus Create Assignment  
 Reason: Staff Hire  
 EE Status: Active

**Assignment Information:**  
 Prime Assignment: 00020043  
 Position: 5010021 502560 Telephone Operator  
 Job: 4001160 502560 Telephone Operator  
 Origin: 30000007 3F108 Adm Account  
 FLA Indicator: N  
 EESGroup: Staff  
 EESubgroup: Non-Exempt 37.5 hour  
 Personnel Area: Main Campus  
 Personnel Subarea: Reg FT

**Employee Information:**  
 245 Maple St  
 Lexington KY 40504  
 034 Fayette  
 Birthdate: 01/01/1982  
 SSN: 555-55-5555  
 Ethnic Origin: Black/Not Hispanic origin  
 Residence Status:

**Base Pay:**  
 Payroll Area: B181-weekly  
 FTE: 100.00  
 Grade: 25  
 Wage Type Assmnt: 13.00  
 Annual Salary: 25,350.00  
 True Annual Salary: 25,350.00

**Recurring/Additional Payments**

**Dates:**  
 End of Orientation: 01/10/2007  
 Vacation Begin Date:  
 Original Hire Date: 10/12/2006  
 Current Hire Date: 10/12/2006  
 Regular Service Date: 10/12/2006  
 Vacation Service Date: 10/12/2006

**Comments from Selection Screen:**  
 Call Mary at 7-7777

## Save the PAR to Your Computer



1. To save the PAR to your computer, go to the Menu bar and select **Go To -> List Display**.

2. The PAR will be displayed in a new format.

**10/12/2006 Tawetta Bird - 10027416**

**Action Information:**  
 Personnel Number: 00020043  
 Period: 10/12/2006 - 12/31/9999  
 Type: Main Campus Create Assignment  
 Reason: Staff Hire  
 EE Status: Active

**Assignment Information:**  
 Prime Assignment: 00020043  
 Position: 5010021 502560 Telephone Operator  
 Job: 4001160 502560 Telephone Operator  
 Origin: 30000007 3F108Adm Account  
 FLA Indicator: N  
 EESGroup: Staff  
 EESubgroup: Non-Exempt 37.5 hour  
 Personnel Area: Main Campus  
 Personnel Subarea: Reg FT

**Employee Information:**  
 245 Maple St  
 Lexington KY 40504  
 034 Fayette  
 Birthdate: 01/01/1982  
 SSN: 555-55-5555  
 Ethnic Origin: Black/Not Hispanic origin  
 Residence Status:

**Base Pay:**  
 Payroll Area: B181-weekly  
 FTE: 100.00  
 Grade: 25  
 Wage Type Assmnt: 13.00  
 Annual Salary: 25,350.00  
 True Annual Salary: 25,350.00

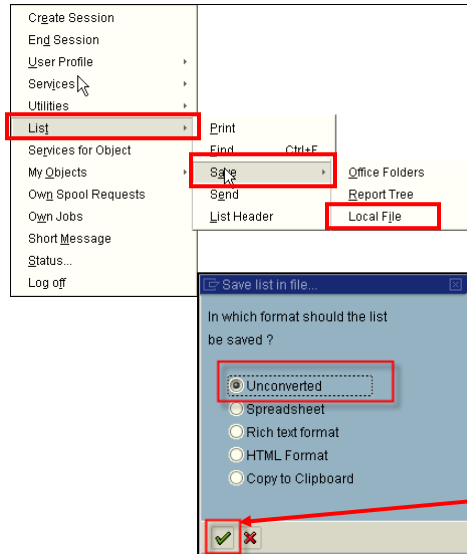
**Recurring/Additional Payments**

**Dates:**  
 End of Orientation: 01/10/2007  
 Vacation Begin Date:  
 Original Hire Date: 10/12/2006  
 Current Hire Date: 10/12/2006  
 Regular Service Date: 10/12/2006  
 Vacation Service Date: 10/12/2006

**Comments from Selection Screen:**  
 Call Mary at 7-7777

Signature: \_\_\_\_\_  
 Printed by: WUNDEK

## Save the PAR to Your Computer




3. Go to the Menu bar and select **System** -> **List** -> **Save** -> **Local File**.

4. A dialog box will appear. Choose **Unconverted** format.

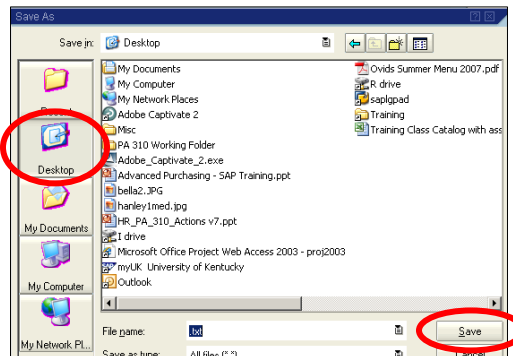
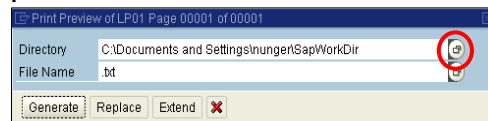
5. Then click the **Continue** icon.

## Save the PAR to Your Computer



6. A dialog box will appear. Click on the **Possible Entries** icon  in the Directory field.

7. The **Save As** box appears. Choose the desired location on your computer (such as Desktop), then click the **Save** button.

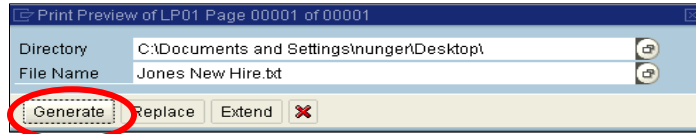




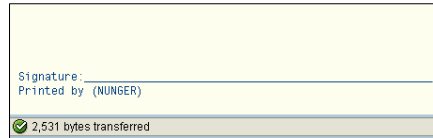
## Save the PAR to Your Computer



8. Enter a **File Name** (make sure filetype is .txt) and **Save**.
9. Click on **Generate**.



10. A system message will appear in the lower-left corner of the screen.



The PAR is now saved in the location you specified.

## Exercise 2.1, 2.2



# Go to the Exercise Guide



## How to Recover From Interruptions



- If you are interrupted in the middle of creating an action, you can recover if the **Action (000)**, **Personal Data (0002)**, and **Organizational Data (0001)** infotypes were completed and **SAVED**.
- If only part of the three infotypes has been saved, call Compensation for directions on how to proceed.



## How to Recover From Interruptions



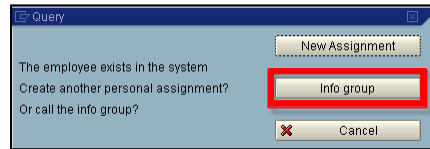
- If you saved infotypes 0000, 0002, and 0001:
  - ♦ In PA40, type the employee's **Person ID** and press Enter (if you do not know the ID number, you can search for it).
  - ♦ Enter the same **Start** date used when interrupted.
  - ♦ Select the same Action used when interrupted.
  - ♦ Click on **Execute**.

Personnel Actions			
Action Type	Personn.	EE group	EE subg...
Main Campus Create Assignment			
Hospital Create Assignment			

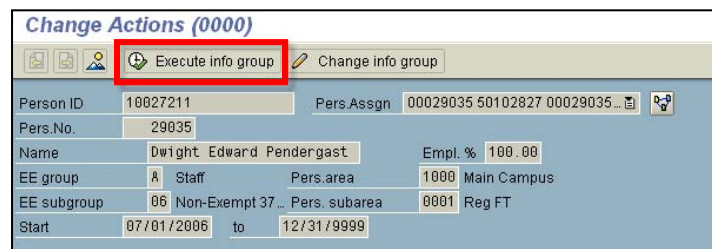
## How to Recover From Interruptions



- When the **Query** box appears, click on **Info Group**.



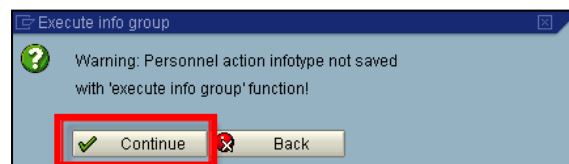
- The **Change Actions (0000)** infotype will appear. Click on the **Execute Info Group** button.




## How to Recover From Interruptions



- The **Execute Info Group** message box will appear. Click on the **Continue** button.



- You will be returned to the **Actions** infotype.
- Click on the **Next Record** icon  until you reach the infotype you were unable to complete.
- You need to finish the infotypes you did not complete when you were interrupted.

## How to Recover From Interruptions



**Change Personal Data (0002)**

Person ID: 10027211 Pers. Assgn: 00029035 50102827 00029035

Name: Dwight Edward Pendergast Empl. %: 100.00

EE group: Staff Pers. area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 37 Pers. subarea: 0001 Reg FT

Start: 04/16/1976 To: 12/31/9999

Name

Title: Name format:

Last name: Pendergast

First name: Dwight

Middle name: Edward

Suffix: Known As:

Name: Dwight Edward Pendergast

HR data

SSN: 245-57-8512

Birth date: 04/16/1976

Gender:  Female  Male

Mar. Status: 1 Marr

Continue through the action by clicking on either the **Next Record** icon (for information previously saved) or **Save** icon (to save new information).

Complete the unfinished infotypes.

## Exercise 2.3



# Go to the Exercise Guide



## Main Campus Rehire/Reinstate – PA40



- Rehire/Reinstate is used when a former UK employee has been **rehired** to a main campus position
- Compensation will complete the information needed to distinguish the “new” employee as either a **rehire** or a **reinstate**.
- You must start with a blank **Person ID** field.



## Rehires/Reinstates and I-9s



- Non-US citizens need to complete a new I-9 when they return to work at the University regardless of length of time away from the University.
- US citizens who have been away from the University for more than one year also need to complete a new I-9.
- If you have questions, contact Compensation.



## Rehires/Reinstates and PerNrs



- When a former employee returns to UK as a rehire or reinstate, the employee retains his/her **previous** Personnel Assignment Number (PerNr) even if the employee's Position Number has changed.
  - ♦ For Example, in the **Personnel Assignment** field:
    - Todd's information in original position is  
**00001298** 50106987 **00001298**
    - When he is separated, the information becomes  
**00001298** 99999999 **00001298**
    - When he is reinstated/rehired, the information becomes  
**00001298** 50112548 **00001298**
  - ♦ The PerNr is still 00001298.
  - ♦ The only difference is the Position Number change.

## Rehire/Reinstate - PA40



1. Delete any number in the **Person ID** field, then press Enter.
2. Enter the first day of work as the **Start Date**.
3. Select **Main Campus Create Assignment**

or **Hospital Create Assignment**.

4. Click on the **Execute** icon. 

## Rehire/Reinstate – PA40



5. The **Employee Recognition** box will appear.

- ◆ Enter the employee's SSN (Social Security Number).
- ◆ Click on the **Continue** icon or press Enter.

Employee Recognition

Personnel Data

Form of Addr

Last Name

First Name

Date of Birth  Gender  Female  Male  TBD

SSN 555-12-1492

## Rehire/Reinstate – PA40



6. The **Employees with Identical Data** box will appear.

- ◆ Double-click on the employee name.

Employees with Identical Data

Employees with the same data exist  
Select the identical employee or choose  
'New Employee' if you want to create a new employee

Name	Personnel assignment	Position	Org. Unit	Empl. S
Herman Jones	99999999 00009471 (Withdrawn)	Default position	Electrical Engineering	100.00

## Rehire/Reinstate – PA40



7. The **New Work Relationship** box will appear.

- ◆ Select **Rehiring of Employee**.
- ◆ Click on the **Continue** icon or press Enter.


8. The infotypes will appear in the correct sequence.

## Rehire/Reinstate Infotypes



Person ID	10010989	Pers Assgn	00009471 99999999 00009471...
Pers.No.	9471		
Name	Herman Jones		
EE group	B	Students	Pers.area
EE subgroup	10	Research Assi...	Pers. subarea
Start	07/01/2006	to	12/31/9999
Personnel action			
Action Type	V1 Rehire/Reinstate		
Reason for Action	[Dropdown Menu]		
Status			
Customer-specific			
Employment	3 Active		
Special payment			
Organizational assignment			
Position	99999999		
Personnel area	1000	Main Campus	
Employee group	B	Students	
Employee subgroup	10	Research Assistant	

• Actions (0000)







- ◆ Select the **Reason for Action**.
- ◆ Enter the **Position number**.
- ◆ Press Enter.
- ◆ Click on **Save**. 

Be sure to change the Position number!






## Rehire/Reinstate Infotypes



Infotype	What You Do
<b>Personal Data</b> (0002)	<ul style="list-style-type: none"> <li>Verify the data</li> <li>If it is correct, click on <b>Next Record</b> </li> <li>If you make changes, click on <b>Save</b> </li> </ul>
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>Press Enter to populate the fields</li> <li>Click on <b>Save</b> </li> </ul>
<b>Addresses</b> (0006)	<ul style="list-style-type: none"> <li>Verify the data</li> <li>If it is correct, click on <b>Next Record</b> </li> <li>If you make changes, click on <b>Save</b> </li> </ul>
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>Change the Employment Percent, if needed</li> <li>Press Enter to populate the fields</li> <li>Click on <b>Save</b> </li> </ul>

## Rehire/Reinstate Infotypes



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>Enter the Hourly Rate, Monthly Salary, or Biweekly Salary</li> <li>Press Enter to populate the fields</li> <li>Click on <b>Save</b> </li> </ul>
<b>Date Specifications</b> (0041)	<ul style="list-style-type: none"> <li>Verify the data</li> <li>Click on <b>Save</b> </li> </ul>
<b>Additional Personal Data</b> (0077)	<ul style="list-style-type: none"> <li>Verify the data</li> <li>Click on <b>Save</b> </li> </ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>Obtain authorization signatures</li> <li>Attach necessary paperwork</li> <li>Send to Compensation</li> </ul>

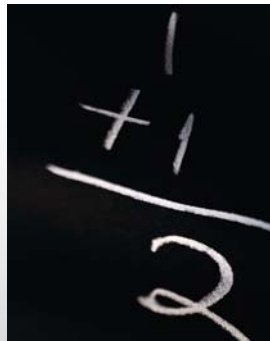
## Summary



- New Hire
- Payroll Authorization Record (PAR)
  - ♦ Create a PAR using ZHR\_PAR
  - ♦ Print copies of a PAR
  - ♦ Save a PAR to your computer
- How to Recover from an Interruption
- Rehire/Reinstate



## Unit 3



# Additional Assignments

## Unit 3 – Additional Assignments



- Concurrent Employment
  - ♦ Personnel Assignment Numbers
  - ♦ Payroll Area Process Change
  - ♦ Overloads
  - ♦ Create Additional Assignment
- End of Additional Assignment
- Reactivate Additional Assignment

## Key Terminology



Terminology	Definition
Non-exempt	These employees are typically paid <b>hourly</b> and must submit a daily time sheet and receive overtime pay.
Exempt	These employees are typically <b>salaried</b> ; they are exempt from submitting a daily time sheet and from overtime pay.

## Concurrent Employment



- Used to assign a UK employee to an **additional assignment** (non-exempt employee) or an **overload** (exempt employee)



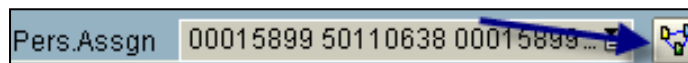
PLUS



## Concurrent Employment



- To view assignment information for an employee, such as the organizational unit for each assignment, display the employee's record, and then click on the **Assignment Overview** icon.



- The **Personnel Assignment Overview** will appear.

Personnel assignment	Position	Org. Unit	Empl. %	Cost Ctr
50110654 00028373 (Active)	Student/Non-Work Study	Residence Life	20.00	RESIDENC
50110654 00028374 (Active)	Student/Non-Work Study	Residence Life	20.00	RESIDENC
50110625 00012545 (Active)	Student/Non-Work Study	Library Administration	100.00	LIBRARY

## Concurrent Employment



- When processing additional assignments in IRIS, the employee **MUST** be set up in the **SAME** Payroll Area – Monthly or Biweekly – for **ALL** assignments.
- The Main Assignment will drive the Payroll Area for the employee.
- Departments may need to communicate to determine which department will be Main.
- The Main indicator drives many rules in the system, including:
  - ♦ OT (Overtime) cost distribution
  - ♦ Benefit eligibility
  - ♦ Vacation accruals



## Overloads



- Overloads pertain to exempt employees who will be working an additional job (assignment) on campus.
- Overloads need to be approved as follows, **BEFORE** data is entered into IRIS:
  - ♦ Complete the Staff Overload form and send it to Compensation for approval, and then enter the action.
  - ♦ Complete the Faculty Overload form and get it approved; Compensation does not approve Faculty Overloads.
- Make sure the validity date covers a whole month.
  - ♦ Example: Sally will be working an overload April 4 through April 20, so the start date of the assignment should be April 1. When the End of Assignment action is entered, that start date will be May 1 (the day after the last day of work on that assignment).

## Additional Assignment – PA40



1. Delete any number in the **Person ID** field, then press Enter.
2. Enter the **Start** date.  
If the employee is non-exempt and not being paid a salaried amount on Basic Pay (0008), enter the first day the employee will be attached to the new position.  
If the employee is exempt and being paid a salaried amount on Basic Pay (0008), enter the first day of the month.
3. Select **Main Campus Create Assignment**



or **Hospital Create Assignment.**

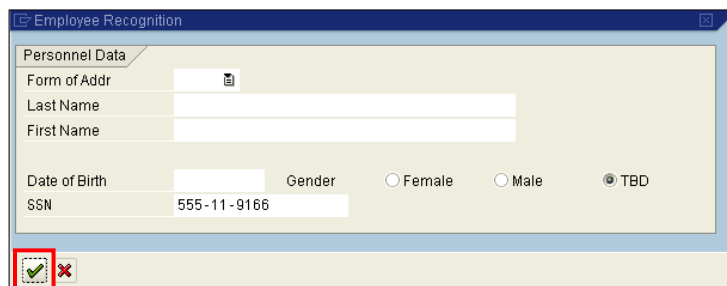


4. Click **Execute.** 


## Additional Assignment – PA40



5. Employee Recognition box
  - ♦ Enter the employee's SSN (Social Security Number).
  - ♦ Click on the **Continue** icon or press Enter.



The screenshot shows a web form titled "Employee Recognition" with a "Personnel Data" section. The form contains the following fields and options:

Form of Addr	<input type="text"/>	
Last Name	<input type="text"/>	
First Name	<input type="text"/>	
Date of Birth	<input type="text"/>	Gender <input type="radio"/> Female <input type="radio"/> Male <input checked="" type="radio"/> TBD
SSN	<input type="text" value="555-11-9166"/>	

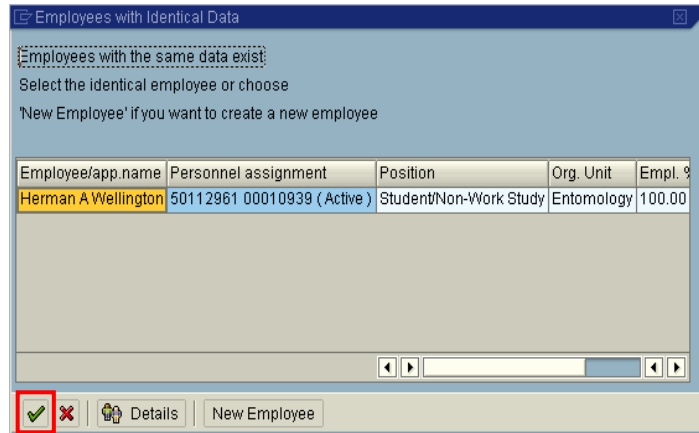
At the bottom left of the form, there is a red box highlighting a green checkmark icon and a red 'X' icon.

## Additional Assignment – PA40



### 6. Employees with Identical Data box

- ◆ Double-click on the employee's name.

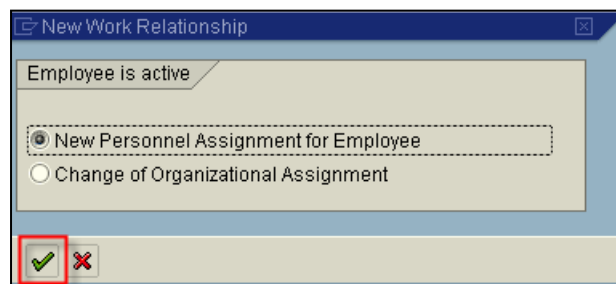


## Additional Assignment – PA40



### 7. New Work Relationship



- ◆ Select **New Personnel Assignment for Employee**.
- ◆ Click on the **Continue** icon or press Enter.



### 8. The infotypes will appear in the correct sequence.





## Additional Assignment Infotypes



Infotype	What You Do										
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>Enter the Reason for Action                             <table border="1" data-bbox="878 415 1146 468"> <tr> <td>10</td> <td>Main Campus Additional Assign</td> </tr> <tr> <td>20</td> <td>Hospital Additional Assignment</td> </tr> </table> </li> <li>Enter the <b>Position</b> number</li> <li>Press Enter to validate your entries</li> <li>Click on <b>Save</b> </li> </ul>	10	Main Campus Additional Assign	20	Hospital Additional Assignment						
10	Main Campus Additional Assign										
20	Hospital Additional Assignment										
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>Make sure all assignments are in the <b>SAME</b> Payroll area                             <table border="1" data-bbox="647 667 1161 743"> <tr> <td colspan="2">Personnel structure</td> </tr> <tr> <td>EE group</td> <td>B Students</td> </tr> <tr> <td>EE subgroup</td> <td>09 Student</td> </tr> <tr> <td>Payr.area</td> <td>B1 Bi-weekly</td> </tr> <tr> <td>Contract</td> <td></td> </tr> </table> </li> <li>If not, change the Payroll Area from the default value for the position to match the Payroll Area on the Main position</li> <li>Press Enter</li> <li>Click on <b>Save</b> </li> </ul>	Personnel structure		EE group	B Students	EE subgroup	09 Student	Payr.area	B1 Bi-weekly	Contract	
Personnel structure											
EE group	B Students										
EE subgroup	09 Student										
Payr.area	B1 Bi-weekly										
Contract											

## Additional Assignment Infotypes



Infotype	What You Do														
<b>Addresses</b> (0006)	<ul style="list-style-type: none"> <li>Verify the data</li> <li>If it is correct, click on <b>Next Record</b> </li> <li>If you make changes, click on <b>Save</b> </li> </ul>														
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>Verify or change Employment Percent (FTE)                             <table border="1" data-bbox="898 1436 1170 1614"> <tr> <td colspan="2">Working time</td> </tr> <tr> <td>Employment percent</td> <td>20.00</td> </tr> <tr> <td>Daily working hours</td> <td>1.60</td> </tr> <tr> <td>Weekly working hours</td> <td>8.00</td> </tr> <tr> <td>Monthly working hrs</td> <td>34.67</td> </tr> <tr> <td>Annual working hours</td> <td>416.00</td> </tr> <tr> <td>Weekly workdays</td> <td></td> </tr> </table> </li> <li>Press Enter</li> <li>Click on <b>Save</b> </li> </ul>	Working time		Employment percent	20.00	Daily working hours	1.60	Weekly working hours	8.00	Monthly working hrs	34.67	Annual working hours	416.00	Weekly workdays	
Working time															
Employment percent	20.00														
Daily working hours	1.60														
Weekly working hours	8.00														
Monthly working hrs	34.67														
Annual working hours	416.00														
Weekly workdays															
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>Enter the Hourly Rate, Monthly Salary, or Biweekly Salary</li> <li>Press Enter</li> <li>Click on <b>Save</b> </li> </ul>														



## Additional Assignment Infotypes



T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"><li>• Obtain authorization signatures</li><li>• Attach necessary paperwork</li><li>• Send to Compensation</li></ul>

## Additional Assignment Tip



- If you are creating an additional assignment that does **not** start at the beginning of a pay period, there will be issues with the time evaluation process on the employee.
- All or part of the hours on one assignment will not be picked up during the payroll process.
- Contact the HR IRIS Team to ensure that the time evaluation process is adjusted to capture all the hours.
  - ♦ Michelle Bliffen - 257-5962

## End of Additional Assignment - PA40



- In many cases, an additional assignment will not be the employee's Main (prime) assignment.
- If necessary, communicate with any other department in which the employee will remain working to determine which assignment is Main.
- Reminder: if the assignment is an overload for an exempt employee, make sure the validity date covers a whole month.
- Check to make sure the employee is not leaving all employment at the University.

## End of Additional Assignment - PA40



1. Enter the Person ID or use the **Possible Entries** icon to find the employee in the system.


Person ID	10001774	
-----------	----------	--

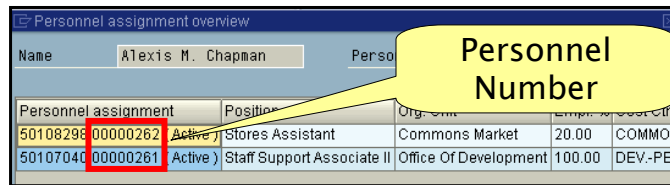
Then press Enter to populate the employee information.

Person ID	10001774	Pers. Assgn	00000253 50129031 00000253 ...		
Name	Jane Hathaway	Empl. %	100.00		
EE group	A Staff	Pers. area	1000 Main Campus		
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT		

## End of Additional Assignment - PA40



2. It is important to know the **CORRECT** Personnel Number (the one for the assignment that is ending).
  - To determine the correct Personnel Number, use the **Assignment Overview** icon  located to the right of the **Personnel Assignment** field.
  - Click on the icon to display a box showing all the assignments connected to the employee.



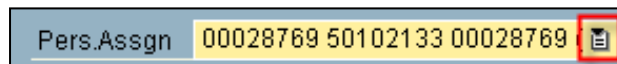
A screenshot of the 'Personnel assignment overview' window. The window title is 'Personnel assignment overview'. It shows a table with columns: Personnel assignment, Position, Org. Unit, Emp. Status, and Other. The first row is highlighted in yellow and has a red box around the 'Personnel assignment' field. A yellow callout bubble points to the 'Personnel assignment' field with the text 'Personnel Number'.

Personnel assignment	Position	Org. Unit	Emp. Status	Other
50108298 00000262 (Active)	Stores Assistant	Commons Market	20.00	COMMON
50107040 00000261 (Active)	Staff Support Associate II	Office Of Development	100.00	DEV.-PEF

## End of Additional Assignment - PA40

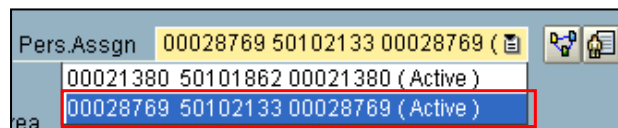


3. Click on the **Assignment List** icon located to the right of the **Personnel Assignment** field.



A screenshot of the 'Personnel assignment' field. The field contains the text 'Pers.Assgn 00028769 50102133 00028769' and an 'Assignment List' icon (a document with a magnifying glass) to its right. The icon is highlighted with a red box.

4. Select the correct PerNr (Personnel Number) for the assignment that is ending.



A screenshot of the 'Personnel assignment' field. The field contains the text 'Pers.Assgn 00028769 50102133 00028769' and three icons to its right: a document with a magnifying glass, a document with a magnifying glass and a plus sign, and a document with a magnifying glass and a minus sign. Below the field, there are two lines of text: '00021380 50101862 00021380 (Active)' and '00028769 50102133 00028769 (Active)'. The second line is highlighted with a red box.

5. Press Enter.

## End of Additional Assignment – PA40



### 6. Enter the **Start** date.

- If the employee is **non-exempt** (not paid a salaried amount on Basic Pay 0008), enter the day **AFTER** the last day worked.
- If the employee is **exempt** (paid a salaried amount on Basic Pay 0008), enter the day **AFTER** the last day of the last month in which the employee worked.



### 7. Select **End of Additional Assignment**.

### 8. Click Execute.

### 9. The infotypes appear in the correct sequence.

## End of Additional Assignment Infotypes



Infotype	What You Do														
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Enter the Reason for Action  <input type="text" value="Z1 End of Additional Assignment 01"/> </li> <li>• Press Enter through the system message(s)  <input type="text" value="Record valid from 08/07/2005 to 12/31/9999 delimited at end"/> </li> <li>• Click on <b>Save</b> </li> </ul>														
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Verify that the Position number has defaulted to 99999999</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul> <div data-bbox="873 1562 1205 1766" style="border: 1px solid black; padding: 5px;"> <table border="1"> <tr> <td colspan="2">Organizational plan</td> </tr> <tr> <td>Position</td> <td>99999999 Default position</td> </tr> <tr> <td>Job key</td> <td>40500906 Stores Assistant</td> </tr> <tr> <td>Exempt</td> <td>N</td> </tr> <tr> <td>Org. Unit</td> <td>30000307 Blazer Dining Services</td> </tr> <tr> <td>Org. key</td> <td>10001033151220</td> </tr> <tr> <td>Supervisor</td> <td></td> </tr> </table> </div>	Organizational plan		Position	99999999 Default position	Job key	40500906 Stores Assistant	Exempt	N	Org. Unit	30000307 Blazer Dining Services	Org. key	10001033151220	Supervisor	
Organizational plan															
Position	99999999 Default position														
Job key	40500906 Stores Assistant														
Exempt	N														
Org. Unit	30000307 Blazer Dining Services														
Org. key	10001033151220														
Supervisor															

## End of Additional Assignment Infotypes



T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"><li>• Obtain authorization signatures</li><li>• Attach necessary paperwork</li><li>• Send to Compensation</li></ul>

## Reactivate Additional Assignment - PA40



- This action is used to reactivate additional assignments.
- If an employee has more than one assignment (Personnel Number, or Pernr) and one of those assignments has been ended (Withdrawn), use the **Reactivate Add Assignment** action to reactivate the assignment.
- If the employee has more than one assignment and all the assignments have been separated, use the **Main Campus Create Assignment Rehire** action.
- If the employee only has one assignment, follow the normal procedure for creating an additional assignment.

## Reactivate Additional Assignment – PA40



Example of when to use this action:




- A faculty member had a summer session assignment in 2006 (PerNr #1).
- This summer assignment was in addition to their normal 9-month assignment (PerNr #2).
- After the summer session, PerNr #1 was delimited (ended) using the End of Additional Assignment action.
- Summer 2007 arrives and the faculty member will be teaching the summer session again. Use the Reactivate Additional Assignment action to reactivate the additional assignment.

## Reactivate Additional Assignment – PA40

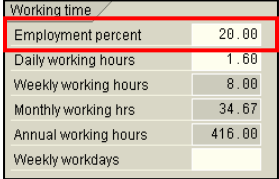




1. Search for the employee by using the **Possible Entries** icon in the **Person ID** field.
2. When you find the employee, press Enter to populate the fields.
3. Go to the **Pers. Assign** field and click on the drop-down menu icon to see all assignments.
4. Find the **Withdrawn** assignment and click on it to select it.
5. Enter the **Start** date of the assignment.
6. Highlight the **Reactivate Add Assignment** action.
7. Click on the **Execute** icon.
8. The infotypes appear in the correct sequence.


## Reactivate Additional Assignment Infotypes

Infotype	What You Do
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Enter the <b>Reason for Action</b></li> <li>• Enter the <b>Position</b> number</li> <li>• Press Enter</li> <li>• Press Enter through the system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Make sure all assignments are in the <b>SAME</b> Payroll Area</li> </ul>  <ul style="list-style-type: none"> <li>• If not, change the Payroll Area to match the Payroll Area on the main position</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>

## Reactivate Additional Assignment Infotypes

Infotype	What You Do
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Verify or change <b>Employment Percent</b> (FTE)</li> </ul>  <ul style="list-style-type: none"> <li>• Press Enter</li> <li>• Press Enter through the system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Enter the Hourly Rate, Monthly Salary, or Biweekly Salary</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>

## Reactivate Additional Assignment Infotypes

Infotype	What You Do
<b>Date Specifications</b> (0041)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Click on <b>Next Record</b> </li> </ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Exercises 3.1, 3.2



Go to the  
Exercise Guide





## Summary



- Concurrent Employment
  - ◆ Personnel Assignment Numbers
  - ◆ Payroll Area Process Change
  - ◆ Overloads
  - ◆ Create Additional Assignment
- End of Additional Assignment
- Reactivate Additional Assignment



## Unit 4



# Change of Assignment

## Unit 4 – Change of Assignment



- Position Change
- Position Update
- Change in Status
- FTE Change
- Long Term Disability I & II

## Change of Assignment Actions



- **Position Change (Create Assignment Action)**
  - ♦ Used when an **EMPLOYEE** is changing from one position to another position (Promotion, Demotion, Transfer, etc.)
- **Position Update**
  - ♦ Used when a **POSITION** is changing and the same employee is staying in the position
- **Change in Status**
  - ♦ Used when the **EMPLOYEE's** employment status is changing (Full Time to Part Time, for example), but **NOT** the position
- **FTE Change**
  - ♦ Used when the employee changes FTE **within** the defined band

## Payroll Schedule



- The Payroll Schedule will be needed in order to create some personnel actions for an employee.
- The Payroll Schedule can be found on Payroll's website: [www.uky.edu/EVPFA/Controller/prlhome/PRSCHEd.html](http://www.uky.edu/EVPFA/Controller/prlhome/PRSCHEd.html)



## Position Change



- Used when an employee in a main campus position is moving to ANOTHER main campus position (for example, promotions, demotions, transfers).
- This is a one-step process completed by the receiving department.
- Communication between the employee's previous and new department is **very** important during this process.
- HR Benefits office will be responsible for changing the Main Personnel Assignment, if it needs to be changed.




## Position Change – Start Dates



- Changes of positions may be made at any time **EXCEPT if the employee is changing Payroll Areas**, such as Biweekly to Monthly or Monthly to Biweekly:
  - ♦ If the employee's **current** (sending) position is **Biweekly**, use the **first day** of the next **Biweekly** pay period he/she is leaving as the Start date.
  - ♦ If the employee's **current** (sending) position is **Monthly**, use the **first day** of the next **Monthly** pay period month as the Start date.
- HR is reviewing the transfer policies to allow for the flexibility that may be needed with this process.

## Position Change



1. Delete any number in the **Person ID** field, then press Enter.
2. Enter the **Start** date.
  - ♦ If the employee is **NOT** changing Payroll Areas, the start date is the first day the employee is in the new position.
  - ♦ If the employee **IS** changing Payroll Areas, the start date is the first day of the payroll period the employee is leaving.
3. Select **Main Campus Create Assignment**  
  
or **Hospital Create Assignment**.  

4. Click **Execute**. 

## Position Change



### 5. Employee Recognition box

- ◆ Enter the employee's SSN (Social Security Number).
- ◆ Click on the **Continue** icon or press Enter.

Employee Recognition

Personnel Data

Form of Addr

Last Name

First Name

Date of Birth  Gender  Female  Male  TBD

SSN 555-01-9678

## Position Change



### 6. Employees with Identical Data box

- ◆ Double-click on the employee's name.

Employees with Identical Data

Employees with the same data exist:  
Select the identical employee or choose  
'New Employee' if you want to create a new employee

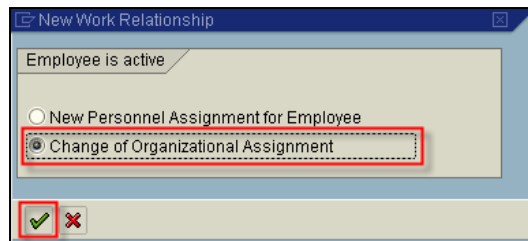
Empl./appl.name	Personnel assignment	Position	Org. Unit
Cleo Witherspoon	50128575 00000250 (Active)	Counsel General Associate	Office Of Legal Cour

## Position Change



### 7. New Work Relationship




- ♦ Select **Change of Organizational Assignment**.
- ♦ Click on the **Continue** icon or press Enter.



8. The infotypes will appear in the correct sequence.



## Position Change Infotypes



Infotype	What You Do
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b></li> <li>• Enter the <b>Position</b> number</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Press Enter and verify the data</li> <li>• Press Enter through any system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Press Enter and verify the data</li> <li>• Press Enter through any system messages</li> <li>• Click on <b>Save</b> </li> </ul>

## Position Change Infotypes




Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Enter the Hourly Rate, Monthly Salary, or Biweekly Salary</li> <li>• Press Enter to populate the <b>Annual Salary</b></li> <li>• Press Enter through any system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Additional Personal Data</b> (0077)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Click on Next Record </li> </ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Position Change – Special Situation



- Transfer of an employee in the Biweekly Payroll Area to a position in the Monthly Payroll Area **AFTER** the Monthly Payroll has completed will produce an **Error Message**.

 No change to payr.area M1 until 11/01/2006; paydays must be in ascending order

- The following steps let you change the employee's organizational assignments when the position requires the employee to switch from Biweekly to Monthly.
- For assistance with this process, please contact Compensation.

## Biweekly to Monthly – Special Situation



This process requires **TWO** Actions:

**ACTION 1:** Use the **Change in Status** action to bring in the new assignment as an **Exempt Biweekly** position. This lets you change the Employee Subgroup on the Monthly Position from **Exempt Monthly** to **Exempt Biweekly**.

**ACTION 2:** Place the position back into its default value of **Exempt Monthly** and effectively place the employee into the **Monthly Payroll Area**.

## Biweekly to Monthly – Special Situation



### ACTION 1: Biweekly to Exempt Biweekly

1. In PA40, enter or find the Employee **Person ID**.
2. Enter the **Start** date.
3. Select the **Change in Status** Action.
4. Click on the **Execute** icon.
5. The infotypes will appear in the correct sequence.

#### Actions (0000) infotype:

- Reason for Action: select **03 Position Update**.
- Position: enter the new Monthly Position number.
- Change **Employee Subgroup** to **Exempt Biweekly**.
- Press Enter to move through informational messages.
- Click on the **Save** icon.



## Biweekly to Monthly – Special Situation



### Organizational Assignment (0001) infotype:

- Verify that the **Exempt** status is marked **Y**.
- Click on the **Save** icon.

### Planned Working Time (0007) infotype:

- Press Enter.
- Click on the **Save** icon.

### Basic Pay (0008) infotype:

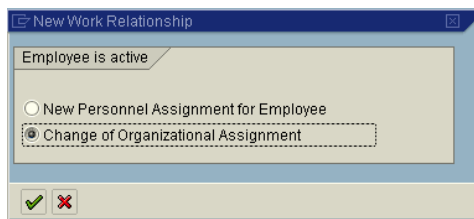
- Change **PS type** to **04 Salaried Exempt MCBW**.
- Change **PS group** to **00**.
- Press Enter.
- Verify that the **Work hours/period** changes to **Bi-weekly**  
Calculate Biweekly Salary (divide annual salary by 26 pay periods).
- Press Enter key.
- Click on the **Save** icon.

## Biweekly to Monthly – Special Situation



### ACTION 2: Exempt Biweekly to Monthly

1. In PA40, do **NOT** enter the **Person ID**.
2. Enter the **Start** date.
3. Select the **Main Campus Create Assignment Action**.
4. Click on the **Execute** icon.
5. On the **Employee Recognition** box, use the SSN to find and select the employee.
6. On the box that appears, select **Change of Organizational Assignment**.
7. Press Enter.



## Biweekly to Monthly – Special Situation



8. The infotypes will appear in the correct sequence.

### Actions (0000) infotype:

- **Reason for Action:** select the appropriate reason.
- In the **Position** field, **delete** the Position number.
- Press Enter.
- In the **Position** field, **re-enter** the Position number.
- Press Enter to bring the default value of **Exempt Monthly** in the **Employee Subgroup** field.
- Click on the **Save** icon.

### Organizational Assignment (0001) infotype:

- Press Enter.
- Click on the **Save** icon.

## Biweekly to Monthly – Special Situation



### Planned Working Time (0007) infotype:

- Press Enter.
- Click on the **Save** icon.

### Basic Pay (0008) infotype:

- Verify **PS type = 01 Salaried Exempt.**
- Verify **PS group = correct value should default .**
- Verify **Work hours/period = Monthly.**
- Enter **Monthly Salary Amount.**
- Press Enter.
- Click on the **Save** icon.

## Exercise 4.1



# Go to the Exercise Guide



## Position Update - PA40



- Used when an employee is in a POSITION that is changing (NOTE: the POSITION is changing, not the employee).
  - ♦ Reclassification/Re-evaluation
  - ♦ Title Change
  - ♦ Change in weekly hours
  - ♦ Change in Title Series or Rank
- Benefits will be responsible for changing the Main Personnel Assignment, if it needs to be changed.

## Position Update – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID 10001774

2. Press Enter to populate the employee's information.
3. Enter the **Start Date** (the first day the employee will be attached to the new position).
4. Select **Position Update**

Position Update

or **Hospital Position Update**.

Hospital Position Update

## Position Update – PA40



5. Click Execute.

6. The **Query** box appears – click on **New Assignment**.

Query



The employee exists in the system  
Create another personal assignment?  
Or call the info group?

New Assignment  
Info group  
Cancel

7. The infotypes will appear in the correct sequence.





## Position Update Infotypes



Infotype	What You Do						
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>Select the <b>Reason for Action</b> <table border="1" data-bbox="899 415 1203 499"> <tr> <td>01</td> <td>Reclassification/Re-evaluation</td> </tr> <tr> <td>02</td> <td>Title Change</td> </tr> <tr> <td>03</td> <td>Change in weekly hours</td> </tr> </table> </li> <li>Highlight the <b>Position</b> number</li> <li>Press Delete</li> <li>Press Enter</li> <li>Re-enter the <b>Position</b> number</li> <li>Press Enter through the system messages                             <div data-bbox="643 732 1227 764" style="border: 1px solid black; padding: 2px;">  Record valid from 03/01/2006 to 12/31/9999 delimited at end                             </div> </li> <li>Click on <b>Save</b> </li> </ul>	01	Reclassification/Re-evaluation	02	Title Change	03	Change in weekly hours
01	Reclassification/Re-evaluation						
02	Title Change						
03	Change in weekly hours						



## Position Update Infotypes



Infotype	What You Do
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>Press Enter and verify the data</li> <li>Press Enter through the system messages</li> <li>Click on <b>Save</b> </li> </ul>
<b>Addresses</b> (0006)	<ul style="list-style-type: none"> <li>Review the <b>Mail Code</b> entry</li> <li>If it is incorrect – Change it, press Enter, and click on <b>Save</b> </li> <li>If it is correct – Press Enter and click on <b>Next Record</b> </li> </ul>
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>Press Enter and verify the data</li> <li>Click on <b>Save</b> </li> </ul>

## Position Update Infotypes



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Enter the Hourly Rate, Monthly Salary, or Biweekly Salary</li> <li>• Press Enter to populate the Annual Salary field</li> <li>• Press Enter through the system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Additional Personal Data</b> (0077)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Click on <b>Next Record</b> </li> </ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Change In Status – PA40



- Used to change an EMPLOYEE's employment **STATUS** (for example, from Full Time to Part Time), but **NOT** the position.
- Should only be used if the employee is remaining in his/her current position.
- **Important:** Before performing this action, certain attributes of the employee's position (such as Personnel SubArea) might need to be changed **first**. If the position's attributes should be changed but have not been, the correct information will **not** default from the position to the employee.
- If you are not sure whether a regular staff position has been changed, contact the HR Compensation office; for temporary or faculty positions, contact your business officer.

## Change In Status – PA40



- Would at least change the **Personnel Subarea**; as a result, **Employment Percent** would change
- If only the **Employment Percent** is changing, you would use the **FTE Change** action
- This change is specific to two values
  - ♦ **Employment Percentage**
  - ♦ **Personnel Subarea**
    - 0001 Regular Full Time
    - 0002 Regular Part Time (Faculty)
    - 0003 Regular Part Time > .74
    - Etc.



## Change in Status – PA40



Acceptable  
FTEs

PSA Code	PSA Text	Allowed FTE
0001	Reg FT	1.0
0002	Reg PT (Faculty)	.20 - .99
0003	Reg PT >.74	.75 - .99
0004	Reg PT .5 to .74	.50 - .74
0005	Reg PT .2 to .49	.20 - .49
0006	Temp FT	1.0
0007	Temp PT >.20	.20 - .99
0013	Temp PT <.20	< .20
0008	WEPP	Always .60
0009	Reg On Call	Always .20
0010	Prem On Call	Always .20
0011	Unpaid	n/a
0012	Non-Service	n/a

## Change in Status – PA40



The employee's **Personnel Subarea** must be consistent with the **Employment Percent** or an error message will occur.

EE group	A	Staff	Pers. area	1000	Main Campus
EE subgroup	03	Exempt Monthly	Pers. subarea	0001	Reg FT
Start	03/01/2006	To	12/31/9999		

Work schedule rule

Work schedule rule	F11C	8 h/d 40 h/w M-F
Time Mgmt status	9 9 - Time evaluation of planned times	
Working week	01 Working Week Sunday - Saturday	
<input checked="" type="checkbox"/>	Part-time employee	

Working time

Employment percent	70.00	<input checked="" type="checkbox"/>	Dyn. daily work schedule
Daily working hours	5.60	Min.	Max.
Weekly working hours	28.00	Min.	Max.
Annual working hours	1456.00	Min.	Max.
Weekly workdays	5.00		

Employment percentage range must be between 100.00 and 100.00

## Change In Status – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID	10001774	
-----------	----------	--

2. Press Enter to populate the employee's information.
3. Enter the **Start** date.
4. Select **Change in Status**.

Change in Status
------------------

5. Click **Execute**.





6. The infotypes will appear in the correct sequence.





## Change in Status Infotypes



Infotype	What You Do														
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b> <table border="1" data-bbox="922 405 1128 562"> <thead> <tr> <th>Ac...</th> <th>Name of reason for acti...</th> </tr> </thead> <tbody> <tr> <td>01</td> <td>Increase FTE</td> </tr> <tr> <td>02</td> <td>Reduce FTE</td> </tr> <tr> <td>03</td> <td>Position Update</td> </tr> <tr> <td>04</td> <td>BW to MO</td> </tr> <tr> <td>05</td> <td>MO to BW</td> </tr> <tr> <td>06</td> <td>Retirement</td> </tr> </tbody> </table> </li> <li>• Press Enter</li> <li>• Press Enter through the system message                      ⚠ Record valid from 10/17/2005 to 12/31/9999 delimited at end                 </li> <li>• Click on <b>Save</b> </li> </ul>	Ac...	Name of reason for acti...	01	Increase FTE	02	Reduce FTE	03	Position Update	04	BW to MO	05	MO to BW	06	Retirement
Ac...	Name of reason for acti...														
01	Increase FTE														
02	Reduce FTE														
03	Position Update														
04	BW to MO														
05	MO to BW														
06	Retirement														
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• The new Personnel Subarea value should default from the position; if it does not, click in the <b>Subarea</b> field and select the appropriate subarea</li> <li>• Press Enter</li> <li>• Press Enter through the system message</li> <li>• Click on <b>Save</b> </li> </ul>														

## Change in Status Infotypes



Infotype	What You Do
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Change the <b>Employment Percent</b> to the new percentage</li> <li>• Press Enter to populate the fields</li> <li>• Press Enter through the system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Verify the Hourly Rate, Biweekly Salary, or Monthly Salary, and change as needed</li> <li>• Press Enter to populate the <b>Annual Salary</b></li> <li>• Press Enter through the system message</li> <li>• Click on <b>Save</b> </li> </ul>
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Change in Status – Phased Retirement



### Step 1



The position that the employee is in must be updated with the new Personnel Subarea of **Phased Retiree (0014)**. Work with Compensation to have the attributes of the position changed.

### Step 2

After the position has been updated by Compensation to reflect the **Phased Retiree** Personnel Subarea, go to PA40, bring up the employee's information, and execute the **Change in Status** action.



## Change in Status – Phased Retirement



Infotype	What You Do														
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>Select the <b>Reason for Action</b> <table border="1" data-bbox="893 1281 1193 1501"> <tr><td>01</td><td>Increase FTE</td></tr> <tr><td>02</td><td>Reduce FTE</td></tr> <tr><td>03</td><td>Position Update</td></tr> <tr><td>04</td><td>BW to MO</td></tr> <tr><td>05</td><td>MO to BW</td></tr> <tr><td>06</td><td>Retirement</td></tr> <tr><td>07</td><td>Phased Retirement</td></tr> </table> </li> <li>Highlight the <b>Position number</b></li> <li>Press Delete</li> <li>Press Enter</li> <li>Re-enter the <b>Position number</b> to bring in the new attributes</li> <li>Press Enter through the system messages</li> </ul> <p> Record valid from 03/01/2006 to 12/31/9999 delimited at end</p> <ul style="list-style-type: none"> <li>Click on <b>Save</b> </li> </ul>	01	Increase FTE	02	Reduce FTE	03	Position Update	04	BW to MO	05	MO to BW	06	Retirement	07	Phased Retirement
01	Increase FTE														
02	Reduce FTE														
03	Position Update														
04	BW to MO														
05	MO to BW														
06	Retirement														
07	Phased Retirement														


## Change in Status – Phased Retirement



Infotype	What You Do
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>Be sure the Personnel Subarea shows the <b>Phased Retiree</b> value</li> </ul> <div data-bbox="625 493 1193 583" style="border: 1px solid gray; padding: 5px;">                     Enterprise structure                      CoCode UK00 University of Kentucky                      Pers.area 1000 Main Campus Subarea 0014 Phased Retiree                      Cost Ctr 1013188430 MEDIA RELATIONS Bus. Area 0500 UKAA                 </div> <ul style="list-style-type: none"> <li>Press Enter through the system messages</li> <li>Click on <b>Save</b> </li> </ul>
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>Change the FTE to 50%. If you leave it at 100%, you will get an error message.</li> </ul> <div data-bbox="682 772 998 850" style="border: 1px solid gray; padding: 5px;">                     Working time                      Employment percent 50.00                      Daily working hours 4.00                 </div> <ul style="list-style-type: none"> <li>Click on <b>Save</b> </li> </ul>

## Change in Status – Phased Retirement



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>If the employee is paid a salary, you <b>must</b> change the salary to reflect the 50% pay. If the employee is paid an hourly rate, enter that same hourly rate.</li> <li>Press Enter to populate the Annual Salary field</li> <li>Press Enter through the system messages</li> <li>Click on <b>Save</b> </li> </ul>
<b>T-Code</b>	<b>What You Do</b>
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>Obtain authorization signatures</li> <li>Attach necessary paperwork</li> <li>Send to Compensation</li> </ul>

## FTE Change - PA40



- Used when an employee's FTE (Employment Percent) is changed.
- There are defined bands of FTE for each Personnel Subarea.
- In this Action, the employee changes FTE **WITHIN** the defined band.
- The FTE change primarily affects the employee's vacation accrual rate.
- Remember: the FTE (Employment Percent) **MUST** be consistent with the Personnel Subarea.

## FTE Change - PA40



Acceptable  
FTEs

PSA Code	PSA Text	Allowed FTE
0001	Reg FT	1.0
0002	Reg PT (Faculty)	.20 - .99
0003	Reg PT >.74	.75 - .99
0004	Reg PT .5 to .74	.50 - .74
0005	Reg PT .2 to .49	.20 - .49
0006	Temp FT	1.0
0007	Temp PT >.20	.20 - .99
0013	Temp PT <.20	< .20
0008	WEPP	Always .60
0009	Reg On Call	Always .20
0010	Prem On Call	Always .20
0011	Unpaid	n/a
0012	Non-Service	n/a

## FTE Change - PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee's record.

Person ID	10001774	
-----------	----------	--

2. Press Enter to populate the employee's information.

3. Enter the **Start** date.

4. Select **FTE Change**.

5. Click **Execute**.

6. The infotypes will appear in the correct sequence.


## FTE Change Infotypes



Infotype	What You Do								
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the Reason for Action</li> </ul> <table border="1"> <tr> <th>A...</th> <th>Name of action ty...</th> <th>Ac...</th> <th>Name of reason for acti...</th> </tr> <tr> <td>ZW</td> <td>FTE Change</td> <td>01</td> <td>FTE Change</td> </tr> </table> <ul style="list-style-type: none"> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>	A...	Name of action ty...	Ac...	Name of reason for acti...	ZW	FTE Change	01	FTE Change
A...	Name of action ty...	Ac...	Name of reason for acti...						
ZW	FTE Change	01	FTE Change						
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Change the <b>Employment Percent</b> to the new FTE</li> <li>• Press Enter to populate the fields</li> <li>• Press Enter through the system messages</li> <li>• Click on <b>Save</b> </li> </ul>								

## FTE Change Infotypes



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"><li>• Verify and/or change the Hourly Rate, Biweekly Salary, or Monthly Salary, and change as needed</li><li>• Press Enter to populate the <b>Annual Salary</b></li><li>• Click on <b>Save</b> </li></ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"><li>• Obtain authorization signatures</li><li>• Attach necessary paperwork</li><li>• Send to Compensation</li></ul>

## Long Term Disability I



- Used primarily to change the Employee Group (**EE Group**) to **M** – Long Term Disability
- Employee will stay in his/her original department and position for 6 months
- Also provides the ability to cancel any Recurring Payments/Deductions

## Long Term Disability I



1. Enter the Person ID or use the **Possible Entries** icon to find the Person ID

Person ID

2. Press Enter to populate the employee's data.

3. Enter the **Start Date**.

4. Select Long Term Disability I.

5. Click **Execute**.

6. The infotypes will appear in the correct sequence.

## Long Term Disability I Infotypes





Infotype	What You Do
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>Enter the Reason for Action</li> <li>Press Enter</li> <li>Change the Employee Group to <b>M</b> for Long Term Disability</li> <li>Press Enter</li> <li>Press Enter through the system message</li> <li>Click on <b>Save</b> </li> </ul>
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>Press Enter to populate the fields</li> <li>Press Enter through the system message</li> <li>Click on <b>Save</b> </li> </ul>

EEGrp	Name of EE Group
A	Staff
B	Students
C	Faculty
D	Post Doctorate
E	House Staff
F	Work Ret Faculty <15
G	Work Ret Staff <15
H	Retiree
J	External
K	Work Ret Faculty >15
L	Work Ret Staff >15
M	Long Term Disability

## Long Term Disability I Infotypes



Infotype	What You Do
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Press Enter</li> <li>• Press Enter through the system messages</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Set the Amount to a SALARY amount; Monthly salary for monthly employees, Biweekly salary for biweekly employees.</li> <li>• Press Enter to populate the <b>Annual Salary</b></li> <li>• Press Enter through the system message</li> <li>• Click on <b>Save</b> </li> </ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Long Term Disability II



- LTD II is completed by Human Resources.
- This Action transfers the employee from the department to the Long Term Disability department in Benefits.
- HR will use ZHR\_PAR to print the PAR report.





## Summary



- Position Change
- Position Update
- Change in Status
- FTE Change
- Long Term Disability I & II



## Unit 5



# Leave of Absence

## Unit 5 – Leave of Absence



- LOA Without Pay
- Return from Leave Without Pay
- LOA With Pay
- Return from Leave With Pay

## LOA Without Pay – PA40



- Used to place a UK employee on leave without pay
- The employee is still linked to the University, but their employment status in IRIS changes to 1 – Inactive.
- Although rare, the inactive status will still allow the employee to get paid through a Recurring Payment record.
- Allows the employee to be enrolled in Benefit plans
- Data required for this action is simply the **Start date** and the **Reason for Action**. The system automatically moves the employee to an Inactive status after the transaction is successfully completed and **saved**.

## LOA Without Pay – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID	10001774	
-----------	----------	--

2. Press Enter.

3. Enter the **Start** date (the date the Leave begins).

4. Select **LOA Without Pay**.

LOA without Pay
-----------------

5. Click **Execute**.

6. The infotypes will appear in the correct sequence.


## LOA Without Pay Infotypes



Infotype	What You Do																										
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b> <table border="1" data-bbox="938 1276 1133 1528"> <thead> <tr> <th>Ac...</th> <th>Name of reason for action</th> </tr> </thead> <tbody> <tr><td>01</td><td>Temporary Disability Leave</td></tr> <tr><td>02</td><td>Educational</td></tr> <tr><td>03</td><td>Military</td></tr> <tr><td>04</td><td>Sabbatical</td></tr> <tr><td>05</td><td>Scholarly</td></tr> <tr><td>06</td><td>Workers' Comp</td></tr> <tr><td>07</td><td>Flex Leave</td></tr> <tr><td>08</td><td>Special Leave without Pay</td></tr> <tr><td>09</td><td>Retiree Extension Leave</td></tr> <tr><td>10</td><td>FML Employee</td></tr> <tr><td>11</td><td>FML Family</td></tr> <tr><td>12</td><td>Other</td></tr> </tbody> </table> </li> <li>• Press Enter</li> <li>• Press Enter through the system message   Record valid from 10/17/2005 to 12/31/9999 delimited at end                     </li> <li>• Click on <b>Save</b> </li> </ul>	Ac...	Name of reason for action	01	Temporary Disability Leave	02	Educational	03	Military	04	Sabbatical	05	Scholarly	06	Workers' Comp	07	Flex Leave	08	Special Leave without Pay	09	Retiree Extension Leave	10	FML Employee	11	FML Family	12	Other
Ac...	Name of reason for action																										
01	Temporary Disability Leave																										
02	Educational																										
03	Military																										
04	Sabbatical																										
05	Scholarly																										
06	Workers' Comp																										
07	Flex Leave																										
08	Special Leave without Pay																										
09	Retiree Extension Leave																										
10	FML Employee																										
11	FML Family																										
12	Other																										
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Presented in Display mode</li> <li>• Review the data and click on the <b>Next Record</b> icon </li> </ul>																										

## LOA Without Pay Infotypes



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"><li>• Presented in Display mode</li><li>• Review the data and click on the <b>Next Record</b> icon </li></ul>
<b>Delimit Recurring Payments/ Deductions</b> (0014)	<ul style="list-style-type: none"><li>• Appears only if this data exists</li></ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"><li>• Obtain authorization signatures</li><li>• Attach necessary paperwork</li><li>• Send to Compensation</li></ul>

## Return From Leave Without Pay – PA40



- Used to return an UK employee from leave without pay
- The process brings the employee back to an active status.
- If the Base Pay **Amount** should change, the action allows you to enter the new value.
- All other infotypes are presented in Display mode for information purposes only.

## Return From Leave Without Pay – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID	10001774	
-----------	----------	--

2. Press Enter to populate the employee fields.
3. Enter the **Start** date (the date the employee returns).
4. Select **Return From Leave without Pay**.

Return From Leave Without Pay
-------------------------------

5. Click **Execute**.

6. The infotypes will appear in the correct sequence.


## Return From Leave Without Pay Infotypes



Infotype	What You Do										
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b></li> </ul> <table border="1"> <tr> <td>A...</td> <td>Name of action type</td> <td>Ac...</td> <td>Name of reason for acti..</td> </tr> <tr> <td>ZN</td> <td>Return From Leave Without Pay 01</td> <td></td> <td>Return to Work</td> </tr> </table> <ul style="list-style-type: none"> <li>• Press Enter</li> <li>• Press Enter through the system message</li> </ul> <table border="1"> <tr> <td></td> <td>Record valid from 10/17/2005 to 12/31/9999 delimited at end</td> </tr> </table> <ul style="list-style-type: none"> <li>• Click on <b>Save</b> </li> </ul>	A...	Name of action type	Ac...	Name of reason for acti..	ZN	Return From Leave Without Pay 01		Return to Work		Record valid from 10/17/2005 to 12/31/9999 delimited at end
A...	Name of action type	Ac...	Name of reason for acti..								
ZN	Return From Leave Without Pay 01		Return to Work								
	Record valid from 10/17/2005 to 12/31/9999 delimited at end										
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Verify the data and click on the <b>Next Record</b> icon </li> </ul>										
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Verify the data and click on the <b>Next Record</b> icon </li> </ul>										

## Return From Leave Without Pay Infotypes



Infotype	What You Do
Basic Pay (0008)	<ul style="list-style-type: none"><li>• If Wage <b>Amount</b> is correct, click on the <b>Next Record</b> icon </li><li>• If Wage <b>Amount</b> needs to be changed,<ol style="list-style-type: none"><li>1) Make the change</li><li>2) Press Enter to populate the new <b>Annual Salary</b></li><li>3) Click on <b>Save</b></li></ol></li></ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"><li>• Obtain authorization signatures</li><li>• Attach necessary paperwork</li><li>• Send to Compensation</li></ul>

## LOA With Pay – PA40

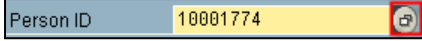
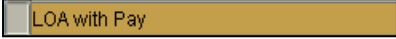



- Used to place an employee on Leave of Absence With Pay
- Reasons for LOA With Pay include the following:
  - ♦ Educational
  - ♦ Scholarly
  - ♦ Sabbatical
  - ♦ Sabbatical Half Pay
  - ♦ Special Leave with Pay
  - ♦ Educational Leave Half Pay
  - ♦ Faculty FML








## LOA With Pay – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee. 
2. Press Enter to populate the employee fields.
3. Enter the **Start Date** (date the leave begins).
4. Select **LOA With Pay**. 
5. Click **Execute**. 
6. The infotypes will appear in the correct sequence.


## LOA With Pay Infotypes



Infotype	What You Do																
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b> <table border="1" data-bbox="919 1283 1138 1440"> <tr><td>01</td><td>Educational</td></tr> <tr><td>02</td><td>Scholarly</td></tr> <tr><td>03</td><td>Sabbatical</td></tr> <tr><td>04</td><td>Sabbatical Half Pay</td></tr> <tr><td>05</td><td>Special Leave with Pay</td></tr> <tr><td>06</td><td>Educational Leave Half Pay</td></tr> <tr><td>07</td><td>Faculty FML</td></tr> </table> </li> <li>• Press Enter</li> <li>• Press Enter through the system message                             <table border="1" data-bbox="634 1520 1203 1551"> <tr> <td></td> <td>Record valid from 12/01/2005 to 12/31/9999 delimited at end</td> </tr> </table> </li> <li>• Click on <b>Save</b> </li> </ul>	01	Educational	02	Scholarly	03	Sabbatical	04	Sabbatical Half Pay	05	Special Leave with Pay	06	Educational Leave Half Pay	07	Faculty FML		Record valid from 12/01/2005 to 12/31/9999 delimited at end
01	Educational																
02	Scholarly																
03	Sabbatical																
04	Sabbatical Half Pay																
05	Special Leave with Pay																
06	Educational Leave Half Pay																
07	Faculty FML																
	Record valid from 12/01/2005 to 12/31/9999 delimited at end																
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Verify the data and click on the <b>Next Record</b> icon </li> </ul>																

## LOA With Pay Infotypes

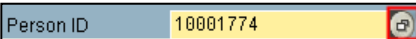




Infotype	What You Do
Basic Pay (0008)	<ul style="list-style-type: none"> <li>• If Wage <b>Amount</b> is accurate, click on the Next Record icon </li> <li>• If Wage <b>Amount</b> needs to be changed                             <ol style="list-style-type: none"> <li>1) Make the change</li> <li>2) Press Enter to populate the new <b>Annual Salary</b></li> <li>3) Click on <b>Save</b></li> </ol> </li> </ul>
T-Code	What You Do
Use ZHR_PAR to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Return From Leave With Pay - PA40






Used to return a UK employee from leave with pay

1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee. 
2. Press Enter to populate the employee fields.
3. Enter the **Start** date (date the employee returns).
4. Select **Return From Leave With Pay**. 
5. Click **Execute**. 
6. The infotypes will appear in the correct sequence.




## Return from Leave With Pay Infotypes



Infotype	What You Do										
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>Select the <b>Reason for Action</b> <table border="1" data-bbox="657 445 1122 501"> <tr> <td>A...</td> <td>Name of action type</td> <td>Ac...</td> <td>Name of reason for acti...</td> </tr> <tr> <td>ZM</td> <td>Return From Leave with Pay 01</td> <td></td> <td>Return to Work</td> </tr> </table> </li> <li>Press Enter through the system message <table border="1" data-bbox="626 562 1179 594"> <tr> <td>!</td> <td>Record valid from 12/05/2005 to 12/31/9999 delimited at end</td> </tr> </table> </li> <li>Click on <b>Save</b> </li> </ul>	A...	Name of action type	Ac...	Name of reason for acti...	ZM	Return From Leave with Pay 01		Return to Work	!	Record valid from 12/05/2005 to 12/31/9999 delimited at end
A...	Name of action type	Ac...	Name of reason for acti...								
ZM	Return From Leave with Pay 01		Return to Work								
!	Record valid from 12/05/2005 to 12/31/9999 delimited at end										
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>Verify data and then click on <b>Next Record</b> </li> </ul>										
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>Verify data and then click on <b>Next Record</b> </li> </ul>										

## Return from Leave With Pay Infotypes



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>If Wage <b>Amount</b> is accurate, click on the Next Record icon </li> <li>If Wage <b>Amount</b> needs to be changed, <ol style="list-style-type: none"> <li>Make the change</li> <li>Press Enter to populate the new <b>Annual Salary</b></li> <li>Click on <b>Save</b></li> </ol> </li> </ul>
T-Code	What You Do
<b>Use ZHR_PAR to print 2 copies of the PAR</b>	<ul style="list-style-type: none"> <li>Obtain authorization signatures</li> <li>Attach necessary paperwork</li> <li>Send to Compensation</li> </ul>

## Go to the Exercise Guide



## Summary

- LOA Without Pay
- Return from Leave Without Pay
- LOA With Pay
- Return from Leave With Pay





## Change in Base Pay

### Change in Base Pay - PA40


- Used to change a UK employee's pay rate in IRIS
- All necessary authorizations and approvals for this change in pay must occur **BEFORE** using the transaction.
- Pay change reasons include:
  - ♦ Reclassification
  - ♦ Equity Adjustment
  - ♦ Market Adjustment
  - ♦ Mid-Year Adjustment




## Change in Base Pay – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.


Person ID  

2. Press Enter to populate the employee fields.
3. Enter the **Start** date (date the new pay rate takes effect).
4. Select **Change in Base Pay**.

5. Click **Execute**. 
6. The infotypes will appear in the correct sequence.

## Change in Base Pay Infotypes



Infotype	What You Do
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b></li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Enter new Hourly Rate, Monthly Salary, or Biweekly Salary</li> <li>• Press Enter to validate the data entry</li> </ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>

## Exercise 6.1



# Go to the Exercise Guide



## Unit 7



# Workers Compensation

## Workers Compensation – PA40



- The work related injury **MUST** be reported to UK Worker's Care at 1-800-440-6285.
- The Workers Compensation action is processed when an employee goes on leave and should no longer receive base pay.
- The employee must be off work completely in **all** assignments due to a work related injury.
  - ♦ If the employee has multiple assignments, all will require the Workers Compensation action.
  - ♦ Contact the other departments immediately so they can enter this data in a timely manner.

## Workers Compensation – PA40




- For regular employees, the first seven calendar days shall be paid by the employee's department
  - ♦ Enter department Workers Compensation pay on the employee's timesheet using Absence Type 7409
- **Time sheets must be maintained for all employees on Workers Compensation, including monthly employees.** Employees receive their pay through the Workers Compensation Third Party Administrator (TPA), so timesheets need to be processed using the Unpaid Leave time type in transaction CAT2.
- The employee may elect to supplement Workers Compensation by requesting 1/3 of salary using TDL and Vacation time if he/she has sufficient quota (enough time accrued).
- Contact Compensation for assistance.

## Workers Compensation – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID 10001774 




2. Press Enter to populate the employee fields.
3. Enter the **Start** date (Enter the first day the employee goes on Workers Compensation after the first 7 calendar days).
4. Select **Workers Compensation** action.

**Workers' Compensation**

5. Click on **Execute**. 
6. The infotypes will appear in the correct sequence.



## Workers Compensation Infotypes



Infotype	What You Do								
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select the <b>Reason for Action</b></li> </ul> <table border="1"> <thead> <tr> <th>A...</th> <th>Name of action type</th> <th>Ac...</th> <th>Name of reason for acti...</th> </tr> </thead> <tbody> <tr> <td>Z5</td> <td>Workers' Compensation 01</td> <td></td> <td>Workers' Compensation</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>	A...	Name of action type	Ac...	Name of reason for acti...	Z5	Workers' Compensation 01		Workers' Compensation
A...	Name of action type	Ac...	Name of reason for acti...						
Z5	Workers' Compensation 01		Workers' Compensation						
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Click on <b>Next Record</b> </li> </ul>								
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Verify data</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>								

## Workers Compensation Infotypes



Infotype	What You Do
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"><li>• Press Enter to validate the data entry</li><li>• Click on <b>Save</b> </li></ul>
<b>Delimit Recurring Payments /Deductions</b> (0014)	<ul style="list-style-type: none"><li>• Delimit departmental items as needed</li><li>• Click on <b>Save</b> </li></ul>
T-Code	What You Do
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"><li>• Obtain authorization signatures</li><li>• Attach necessary paperwork</li><li>• Send to Compensation</li></ul>

## Workers Compensation - PA40



- When the employee returns from Workers Compensation, use the **Return From Leave Without Pay** action.
- Be sure to set the Hourly Rate, Monthly Salary, or Biweekly Salary back to the normal rate!





# Separation & Retirement

- Separation
- Retirement
- Retiree Rehire
- Retiree Set Back to Inactive

## Separation - PA40



- Use this transaction when an employee is **LEAVING** the University. This includes the following:
  - ♦ Students who work in the spring and may or may not return in the fall
  - ♦ Part-time instructors who teach in the spring and may or may not come back to teach the following spring
- Check to make sure the employee does not have any other active assignments.
- A **Separation form** must be completed and sent to Human Resources.

## Separation - PA40



- If an employee is leaving a position in your area and working in a new position across campus, this is **NOT** a Separation.
- If funding is available, you can overlap the separating employee and the new employee.

## Separation - PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID 10001774

2. Press Enter to populate the employee fields.
3. Enter the **Start** date (the day **AFTER** the last day worked).
4. Select the **Separation** action.

Separation

5. Click **Execute**.
6. The infotypes will appear in the correct sequence.

## Separation Infotypes



- **Actions (0000)**
  - ♦ Select the Reason for Action.
  - ♦ Press Enter through the system message.

Record valid from 01/01/2005 to 12/31/9999 delimited at end

- ♦ Click on **Save**.



AC...	Name of reason for action
01	Involuntary Discharge
02	Job Abandonment
03	Quit Without Notice
04	Other Work
05	Self-Employment
06	Working Conditions
07	Personal/Job Conflict
08	Leaving Area
09	Domestic Responsibilities
10	Health
11	Failed to Return From Leave
12	School Responsibilities
13	Leaving School
14	Graduated
15	Anticipation of Discharge
16	Funding Exhausted
17	Position Eliminated
18	Reorganization
19	Assignment Ended
20	Seasonal Work
21	Contract Not Renewed
22	Deceased
23	Org Transferred Outside of UK
24	I-9 Expiration

## Separation Infotypes



- **Organizational Assignment (0001)**

- ♦ Verify that the position number has defaulted to 99999999.

Organizational plan		
Position	99999999	Default position
Job key	40501148	Student/Non-Work St...
Exempt	N	
Org. Unit	30000562	Education Instr Media...
Org.key	10001012004760	
Supervisor		

- ♦ Press Enter.

- ♦ Click on **Save**. 

## Separation Infotypes



- **Addresses (0006)**

- ♦ Enter the forwarding address and phone number, if different from current address.

- ♦ **Save** 

- **Delimit Recurring Payments/Deductions (0014)**

- ♦ This infotype may or may not appear.
- ♦ Delimit any departmental payments.

- ♦ **Save** 

- **Documentation**

- ♦ Complete the Separation form.
- ♦ Obtain the authorization signatures.
- ♦ Attach all necessary paperwork.
- ♦ Send to Compensation.

## Exercise 8.1



# Go to the Exercise Guide



## Retirement



- HR Benefits will process all retirements.
- Contact HR Benefits office if you have a pending retirement action, so they can process it for you.
- If funding is available, you can overlap the retiring employee and the new employee using the same position.



## Retiree Rehire – PA40



- Used when a retired employee returns to work at the University
- Also used for Post-Retirement appointments
- Since the individual was previously employed at UK, some of the employee's records may be accurate.
- **Important:** you will need to change the **Employee Group (EE Group)** to put the working retiree in the correct group. Valid groups include:
  - ♦ G - Working Retired Staff < 15 years of service
  - ♦ L - Working Retiree Staff > 15 years of service
  - ♦ F - Working Retired Faculty < 15 years of service
  - ♦ K - Working Retired Faculty > 15 years of service

## Retiree Rehire and I-9s




- Retirees who have been away from the University for more than one year will need to complete an I-9.
- If needed, contact Compensation for more information.



## Retiree Rehire – PA40



1. Enter the **Person ID** or use the **Possible Entries** icon to find the employee.

Person ID  

2. Press Enter to populate the employee fields.

3. Enter the **Start** date.





4. Select **Retiree Rehire** action. 

5. Click **Execute**. 

6. The infotypes will appear in the correct sequence.






## Retiree Rehire Infotypes



Infotype	What You Do
<b>Actions</b> (0000)	<ul style="list-style-type: none"> <li>• Select Reason for Action (<b>Retiree Rehire</b>)</li> <li>• Enter the <b>Position</b> number</li> <li>• Change the Employee <b>Group</b></li> <li>• Press Enter</li> <li>• Press Enter through the system message</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Personal Data</b> (0002)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• If no changes, click on <b>Next Record</b> </li> <li>• If you make changes, click on <b>Save</b> </li> </ul>
<b>Organizational Assignment</b> (0001)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Click on <b>Save</b> </li> </ul>



## Retiree Rehire Infotypes



Infotype	What You Do
<b>Addresses</b> (0006)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• If no changes, click on <b>Next Record</b> </li> <li>• If you make changes, click on <b>Save</b> </li> </ul>
<b>Planned Working Time</b> (0007)	<ul style="list-style-type: none"> <li>• Verify the data and change if needed</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Basic Pay</b> (0008)	<ul style="list-style-type: none"> <li>• Enter the Hourly Rate or Monthly Salary</li> <li>• Press Enter</li> <li>• Click on <b>Save</b> </li> </ul>
<b>Date Specification</b> (0041)	<ul style="list-style-type: none"> <li>• Verify the data</li> <li>• Click on <b>Save</b> </li> </ul>

## Retiree Rehire Infotypes



Infotype	What You Do
<b>Additional Personal Data</b> (0077)	<ul style="list-style-type: none"> <li>• Verify data</li> <li>• If no changes are needed, click on <b>Next Record</b> </li> <li>• If you make changes, click on <b>Save</b> </li> </ul>
<b>T-Code</b>	<b>What You Do</b>
Use <b>ZHR_PAR</b> to print 2 copies of the PAR	<ul style="list-style-type: none"> <li>• Obtain authorization signatures</li> <li>• Attach necessary paperwork</li> <li>• Send to Compensation</li> </ul>



## Retiree Set Back to Inactive



- HR Benefits will process all retirements.
- Contact HR Benefits office if you have a pending retirement action, so they can process it for you.



## Summary



- Separation
- Retirement
- Retiree Rehire
- Retiree Set Back to Inactive



## HR Resources



- Benefits: 257-9555, option 3
  - ♦ <http://www.uky.edu/HR/benefits/>
- Compensation: 257-9555, option 6
  - ♦ <http://www.uky.edu/HR/comp/>
- Employee Relations: 257-9555, option 7
  - ♦ <http://www.uky.edu/HR/emprel/>
- Employment: 257-9555, option 2
  - ♦ <http://www.uky.edu/HR/employ/>
- Payroll: 257-3946, FAX 257-1143
  - ♦ <http://www.uky.edu/EVPFA/Controller/prlhome/>

## Training Sandbox



- Available for use 24 hours a day, including weekends and holidays
- You can practice here before entering real data into Production



## myHelp Web Site



- Available 24 hours a day, including weekends and holidays
- <http://myhelp.uky.edu/rwd/html/index.html>
- Provides:
  - ♦ Quick Reference Cards
  - ♦ Simulations
  - ♦ Cue Cards
  - ♦ Work Instructions

## Course Summary



You should now be able to:

- Discuss terms and concepts associated with UK Personnel Administration Actions
- Understand the IRIS Actions process
- Perform Personnel Actions in IRIS

