SCT Banner
Human Resources
Employee Compensation Training Workbook

Release 7.1
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Section A: Introduction

Overview

Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to accurately record employee information into the SCT Banner system at your institution. The workbook is divided into three sections:

- Introduction
- Set-up
- Day-to-day Operations

Intended audience

Human Resources Administrators and Office Staff

Prerequisites

Before taking this course, you should have

- completed the SCT Education Practices computer-based training (CBT) tutorial "Banner 6.x Fundamentals: Navigation and Forms," or have equivalent experience navigating in the SCT Banner system
- completed the Human Resources Overview training workbook
- completed the Human Resources Biographic/Demographic workbook
- administrative rights to create the rules and set the validation codes in Banner.

In this section

These topics are covered in this section.

Process Introduction

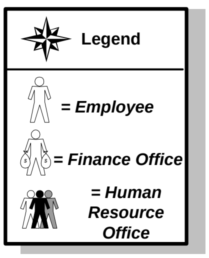
Introduction

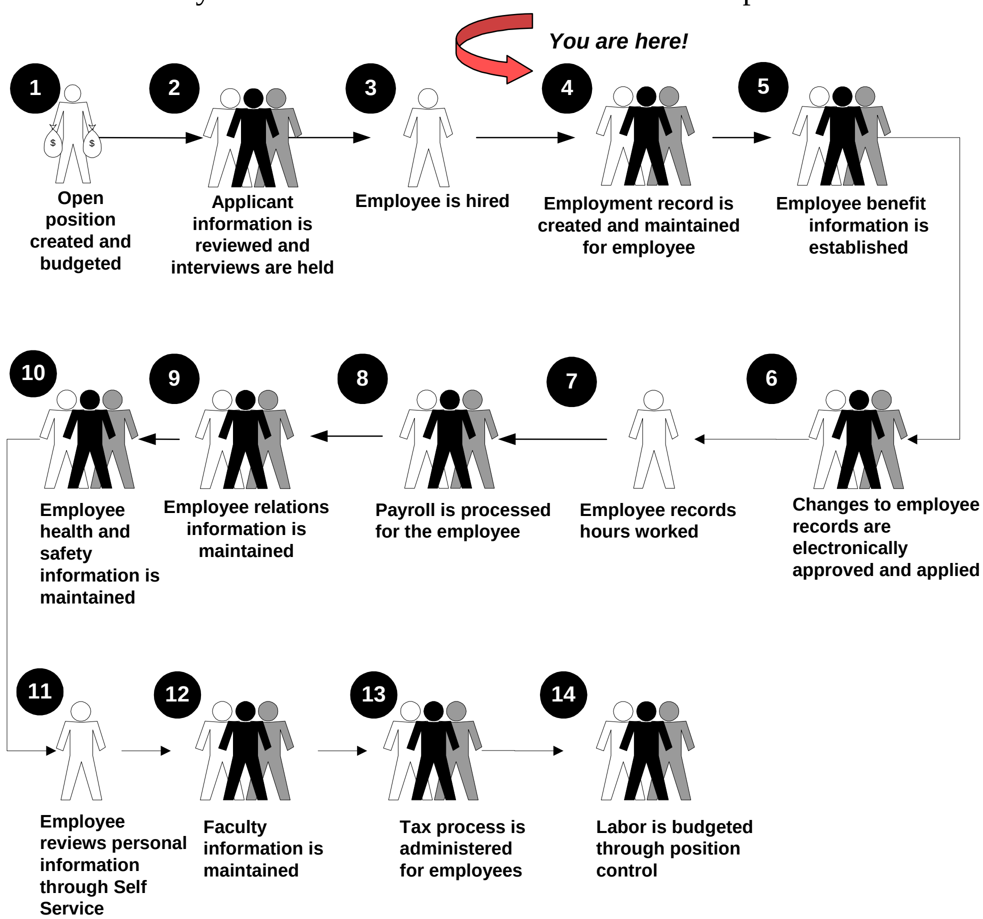
The SCT Banner employee recording process uses several user-defined codes that are necessary when recording information for an employee into the system.

The Human Resources department is responsible for setting up and recording the information.

Flow diagram

This diagram highlights the processes used to record employee information into the SCT Banner system within the overall Human Resource process.





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Process Introduction, Continued

About the process

- Rule and validation forms are set up on the SCT Banner system. Unless a new code is required, this step is only performed once.
- The new employee record is entered into the SCT Banner system.
- Employee review information is collected into the SCT Banner system.
- Employee record is assigned to a job.
- Employee's status is changed, if required.
- Employee committee and service information is maintained.

Section B: Set Up

Overview

Introduction

Before SCT Banner can record and maintain a new employee in the system, there are several codes and rules that need to be set or created.

Objectives

At the end of this section you will be able to

- set up an employee class system
- create a new committee code
- set up leave categories
- establish leave category rules.

Intended audience

The Human Resources office staff who are responsible for creating and maintaining rule and validations forms for employee class, committee/service, and leave categories.

Set up requirements

These forms are used to set the rules and parameters in SCT Banner for handling employee records.

Form Description	Banner Name
Employee Class Rule Form	PTRECLS
Committee/Service Codes Form	STVCOMT
Leave Category Validation Form	PTVLCAT
Leave Category Rule Form	PTRLCAT

In this section

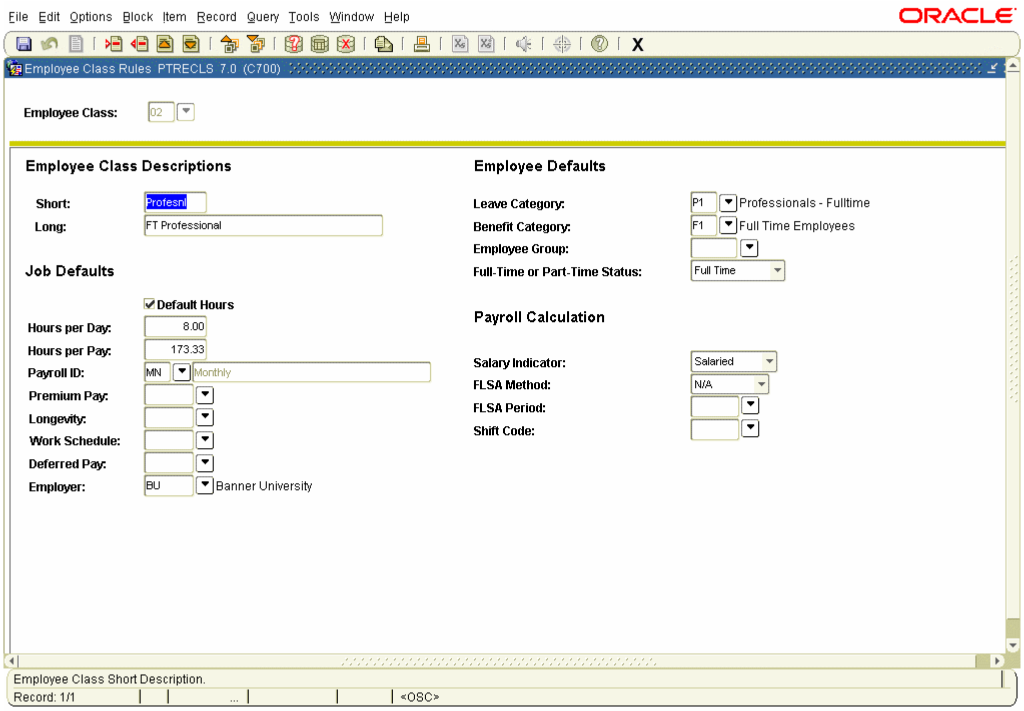
These topics are covered in this session.

Employee Class Set Up

Introduction

The Employee Class Rule Form (PTRECLS) enables you to create an employee class and associate it with earnings codes, leave categories, and benefit categories.

Banner form



Procedure

Follow these steps to create an employee class.

Step	Action
1	Access the Employee Class Rule Form (PTRECLS).
2	Enter a unique code to identify the employee class you are defining in the **Employee Class** field.
3	Perform a **Next Block** function.
4	Enter a description of the employee class (1-8 char) in the **Short** field.
5	Enter an employee class description (1-30 char) in the **Long** field,

Continued on the next page

Employee Class Set Up, Continued

Procedure, continued

Step	Action
6	Double-click in the **Leave Category** field, and select a code that specifies the default leave category for this employee class from the Leave Category Validation Form, PTVLCAT.
7	Double-click in the **Benefit Category** field and select a code that specifies the default benefit category to which this employee class belongs from the Benefit Category Rule Form, PTRBCAT. Notes: The leave and benefit categories specified in these fields default to the Employee Form, PEAEMPL, for employees in this employee class. To enter additional leave categories for which this employee class is eligible, go to the Other Eligible Leave Categories window or the Other Eligible Benefit Categories window from the **Options** menu.
8	Double-click in the **Employee Group** field and select a code that specifies the employee group for this employee class from the Employee Group Validation Form, PTVEGRP.
9	Select *Part Time*, *Full Time*, or *Other* from the drop-down list in the **FT/PT Status** field.
10	Click the **Default Hours** checkbox if the values entered in the **Hrs Per Day** and **Pay** fields should default onto the time sheet and the Online Time Entry Form, PHAHOUR.
11	Enter the number of hours per day assigned for this employee class in the format of 9999.99 in the **Hrs Per Day** field.
12	Enter the number of hours in the pay period defined for this employee class in the format of 9999.99 in the **Pay** field.
13	Double-click in the **Payroll ID** field and select a code that specifies the pay period intervals for this employee class from the Payroll Identification Code Form, PTRPICT.
14	Double-click in the **Premium Pay** field and select the premium pay category associated with this employee class from the Premium Pay Category Validation Form, PTVPCAT.
15	Double-click in the **Longevity Code** field and select a value that specifies additional wages an employee may receive based on length of service from the Longevity Code Validation Form, PTVLGCD.

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Employee Class Set Up, Continued

Procedure, continued

Step	Action
16	Double-click in the **Work Schedule** field and select a code that specifies the work schedule for employees in this employee class from the Work Schedule Validation Form, NTVWKSH.
17	Double-click in the **Deferred Pay** field and select a deferred pay code from the Defer Pay Period Rule Form, PTRDFPR.
18	Double-click in the **Employer Code** field and select the employer code associated with this employee class from the Employer Rule Form, PTREMPR.
19	Select how your employee class will be paid - *Salaried*, *Hourly*, or *Variable*, from the drop-down list in the **Salary Indicator** field.
20	Select an FLSA indicator -*Accrual*, *Cash*, or *N/A*, from the drop-down list in the **FLSA Method** field.
21	Double-click in the **FLSA Period** field and select a work period code associated with this employee class from the Work Period Rule Form, PTRWKPR.
22	Double-click in the **Shift Code** field and select a code that specifies the shift worked by employees in this employee class from the Shift Premium Rule Form, PTRSHFT.
23	Click the **Save** icon.

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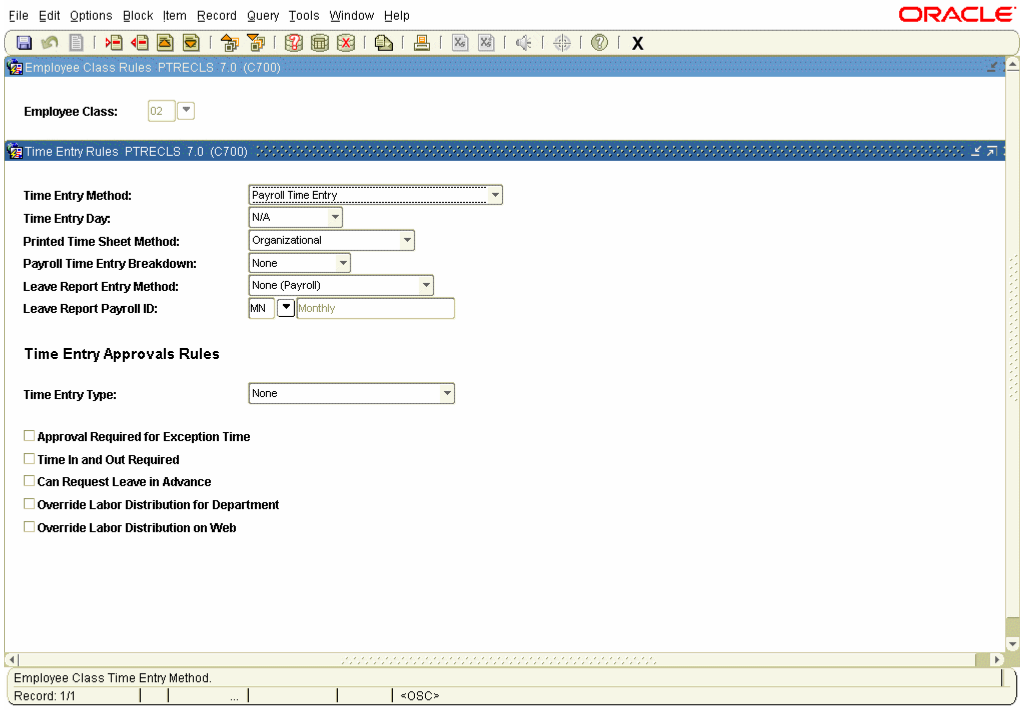
Employee Class Set Up, Continued

Options – Time Entry Rules

The Time Entry Rules window establishes information about how and when time is entered by employees.



Procedure

Follow these steps to establish time entry rules.

Step	Action
1	Select <u>Time Entry Rules</u> from the **Options** menu.
2	Select the method that this employee will enter their time - *Payroll Time Entry*, *Employee Time Entry via Web*, *Dept. Time Entry with Approvals*, or *Third Party with Approvals*, from the drop-down list in the **Employee Class Time Entry Method** field.
3	Select the day of the week that begins the time segment from the drop-down list n the **Time Entry Day** field.
4	Select how this employee class should receive time - *Organizational*, *Roster*, or *Time Sheet*, from the drop-down list in the **Printed Time Sheet Method** field.
5	Select how time will be entered for your employee class - *Daily*, *FLSA*, *Pay Period*, *Weekly*, or *None*, from the drop-down list in the **Payroll Time Entry Breakdown** field.

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Employee Class Set Up, Continued

Procedure, continued

Step	Action
6	Select how leave will be reported for your employee class - *None (Payroll), Leave Report on the Web, Departmental Leave Report*, or *Third Party Leave Report*, from the drop-down list in the **Leave Report Entry Method** field.
7	Double-click in the **Leave Report Pay ID** field and select the Pay ID to report leave against from the Pay Period Identification Codes Rule Form (PTRPICT).
8	Select how this employee class will enter time - *Pay Period Time Sheet, Pay Period Exception Time Only*, or *None*, from the drop-down list in the **Time Entry Type** field.
9	Click the **Approval Required for Exception Time** checkbox to indicate that the entered time must have management approval prior to payroll. Note: If the box is not checked, then the time will be automatically approved.
10	Click the **Time In and Out Required** checkbox if this employee class requires that time in and out be recorded.
11	Click the **Can Request Leave in Advance** checkbox if employees in this employee class can request a leave in advance.
12	Click the **Override Labor Distribution for Dept** checkbox to override Labor Distribution on the Electronic Approvals of Time Entry Form (PHATIME) for employees in this employee class.
13	Click the **Override Labor Distribution on Web** checkbox to allow employees in this employee class to override their labor distribution on the Web at time entry.
14	Click the **Save** icon.

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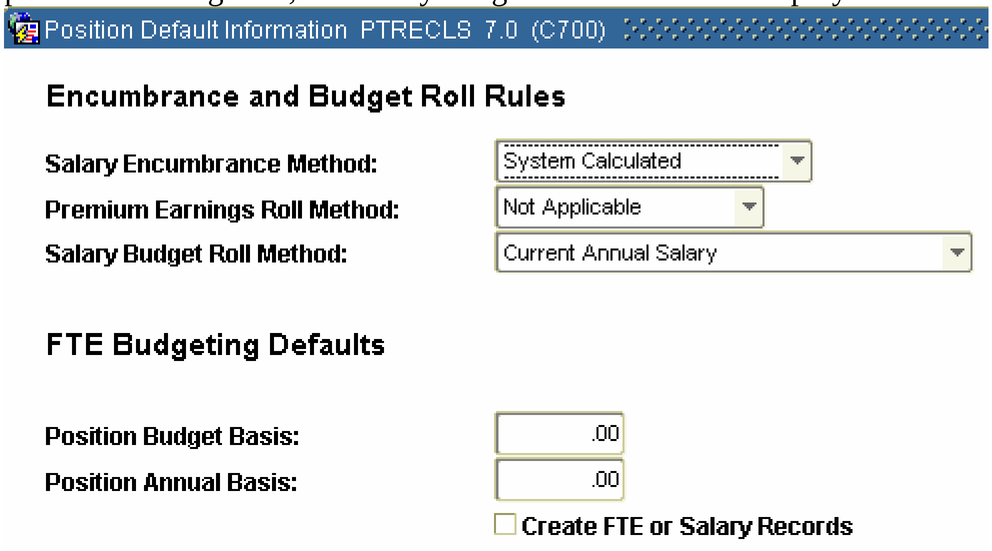
Options – Position Defaults

The Position Defaults window establishes default salary encumbrance, premium earnings roll, and salary budget roll data for this employee class.



Procedure

Follow these steps to establish position defaults.

Step	Action
1	Select Position Defaults from the **Options** menu.

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Employee Class Set Up, Continued

Procedure, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Specify how the salary encumbrance for this employee class will be computed on the Employee Jobs Form (NBAJOBS) - Annual Salary, Hours Input, System Calculated, or Value Input, from the drop-down list in the Salary Encumbrance Method field.
<table>
<tr><th>Value</th><th>Definition</th></tr>
<tr><td>Annual Salary</td><td>The salary encumbrance equals the employee's latest Annual Salary value on NBAJOBS within the active fiscal year (as defined on NBAFISC). The system adjusts the encumbrance to reflect future changes made within the active fiscal year.</td></tr>
<tr><td>Hours Input</td><td>Hours can be entered in the NBAJOBS Salary Encumbrance, Total Contact Hrs, and Total Encumbrance Hours fields. The system calculates the salary encumbrance by multiplying the rate times the encumbrance hours as of the effective date.</td></tr>
<tr><td>System Calculated</td><td>The system computes the salary encumbrance as follows:
When work schedules exist, the system multiplies the rate times the number of hours expected to be worked in the job (as defined in the Work Schedule block of NBAJOBS) within the fiscal year.
When work schedules do not exist, the system defines workdays as Monday through Friday. The assigned salary is multiplied by the appropriate number of pay periods to obtain the salary encumbrance.</td></tr>
<tr><td>Value Input</td><td>Value input is required in the NBAJOBS Salary Encumbrance field. If you select this value, you should pay particular attention to warning messages on NBAJOBS when you commit a job record with a zero salary.</td></tr>
</table>
</td></tr>
</table>

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Employee Class Set Up, Continued

Procedure, continued

Step	Action
3	Select the method to use when premium earnings budgets for position classes assigned to this employee class are rolled - *Actual Expense*, *Current Expense*, *Zero*, or *Not Applicable*, from the drop-down list in the **Premium Earnings Roll Method** field.
4	Select the default method to use when new budgets for position classes assigned to this employee class are generated - *Actual Expense*, *Current Budget*, *Midpoint of Pay Range*, *Remaining Budget*, *Current Annual Salary*, *Current Encumbrance Balance*, or *Zero*, from the drop-down list in the **Salary Budget Roll Method** field.
5	Enter the budgeted number of periods for the employee class in the **Position Budget Basis** field. *Examples*: Months, pay periods, terms, hours, or zero.
6	Enter the planned period of effort for the employee class in the **Position Annual Basis** field. *Examples*: Months, pay periods, terms, hours, or zero. Note: It is important that you use the same type of units that you selected for the **Position Budget Basis** field. For example, if you used pay periods for the position budget basis, be sure to use pay periods in this field.
7	Click the **Create FTE/Salary Records** checkbox if you want to create Job FTE/Salary Calculation and Tracking records for this employee class.
8	Click the **Save** icon.

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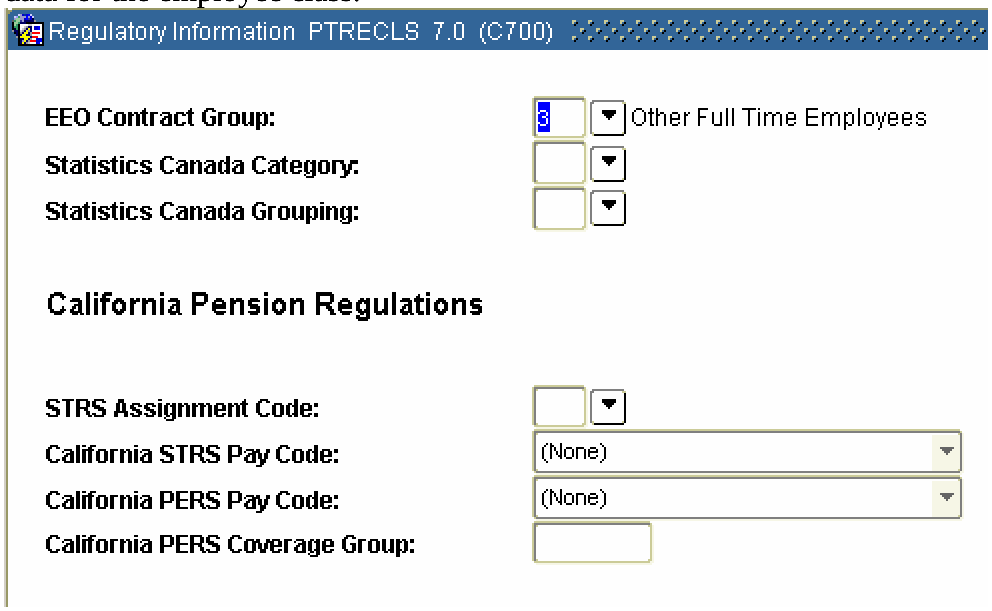
Employee Class Set Up, Continued

Options – Regulatory Information

The Regulatory Information window establishes EEO and Statistics Canada data for the employee class.



Procedure

Follow these steps to establish regulatory information.

Step	Action
1	Select Regulatory Information from the **Options** menu.
2	Double-click in the **EEO Contract Group** field, and select the contract group of employees in this employee class from the EEO Contract Group Validation Form, PTVEEOG.
3	If you are not defined as Canadian on the Position Control Installation Rule Form, NTRINST, go to **Step 6**.
4	Double-click in the **Statistics Canada Category** field, and select a category from the Statistics Canada Category Validation Form, PTVSTCA.
5	Double-click in the **Statistics Canada Grouping** field, and select a group from the Statistics Canada Grouping Code Validation Form, PTVSTGR. Note: The California Pension Regulations section of the window is related to California STRS/PERS processing. See your instructor if you require further details.
6	Click the **Save** icon.

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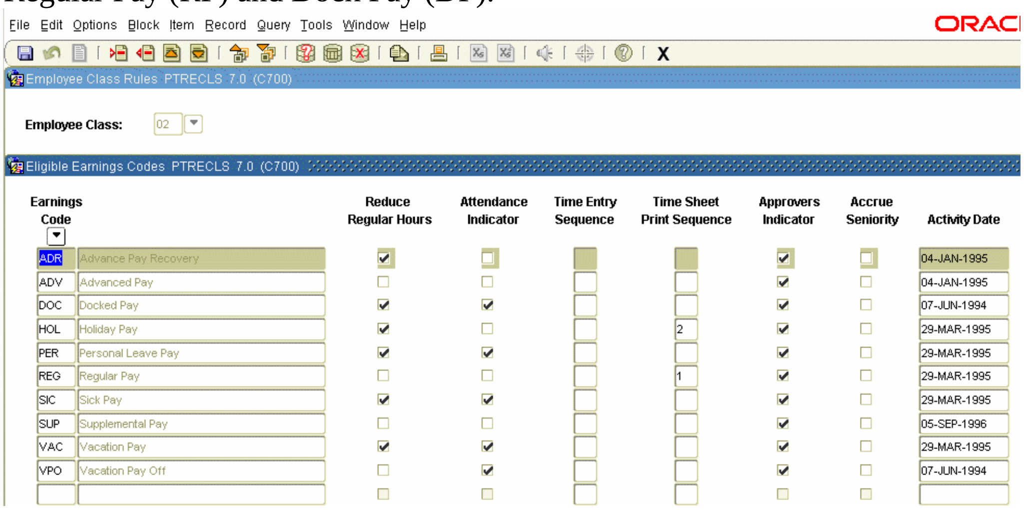
Employee Class Set Up, Continued

Options – Eligible Earnings

The Eligible Earnings window associates eligible earnings codes with this employee class.

Note: All employee classes must have earnings codes with earnings types of Regular Pay (RP) and Dock Pay (DP).



Procedure

Follow these steps to associate eligible earnings with this employee class.

Step	Action
1	Select Eligible Earnings from the **Options** menu.
2	Double-click at the **Earnings Code** field and select the earnings code you want to assign to this employee class from the Earnings Code Rule Form, PTREARN.
3	Click the **Reduce Regular Hours** checkbox if regular pay for this employee class should be reduced when it is higher than the amount specified in this earnings code's definition.
4	Click the **Attend Indicator** checkbox if attendance for this earnings code should be tracked. Note: If you check this box, a flag appears on the Online Time Entry Form (PHAHOUR) reminding you to access the Attendance Validation Form (PHCATND) to enter a detailed day-by-day breakdown of exception hours.
5	Enter a number indicating the sequential position of these earnings in the History Earnings block of the Online Time Entry Form (PHAHOUR) in the **Time Entry Sequence** field. Note: If you have no preference, do not enter a value in this field.

Continued on the next page

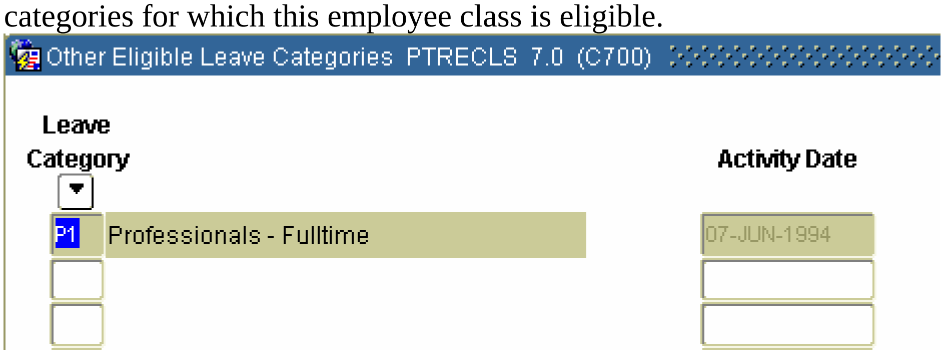
Employee Class Set Up, Continued

Procedure, continued

Step	Action
6	Enter a number indicating the position of these earnings on the time sheet print out in the **Time Sheet Print Sequence** field. Note: If your organization does not print time sheets, leave this field blank.
7	Click the **Approvers Indicator** checkbox if you want the approver to see and add the earnings codes when approving time transactions.
8	If you track seniority, click the **Accrue Seniority** checkbox to indicate if this earnings code adds to Seniority Hours and Earned Seniority Hours.
9	To enter another Earnings Code, perform a **Next Record** function and repeat the process.
10	Click the **Save** icon.

Options – Other Eligible Leave Categories

The Other Eligible Leave Categories windows allow you to specify additional categories for which this employee class is eligible.



Procedure

Follow these steps to enter other eligible leave categories.

Step	Action
1	Select Other Eligible Leave Categories from the **Options** menu.
2	Double-click in the **Leave Category** field and select a leave category to add to this employee class from the Leave Category Validation Rule Form, PTVLCAT.
3	To establish another leave category for this employee class, perform a **Next Record** function and repeat this process.
4	Click the **Save** icon.

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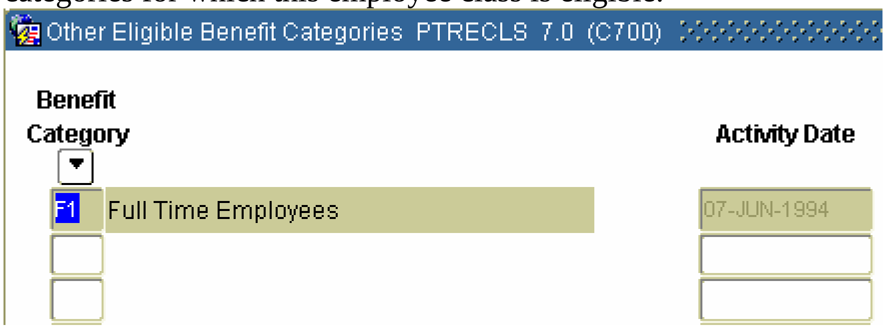
Employee Class Set Up, Continued

Options – Other Eligible Benefit Categories

The Other Eligible Benefit Categories windows allow you to specify additional categories for which this employee class is eligible.



Procedure

Follow these steps to enter other eligible benefit categories.

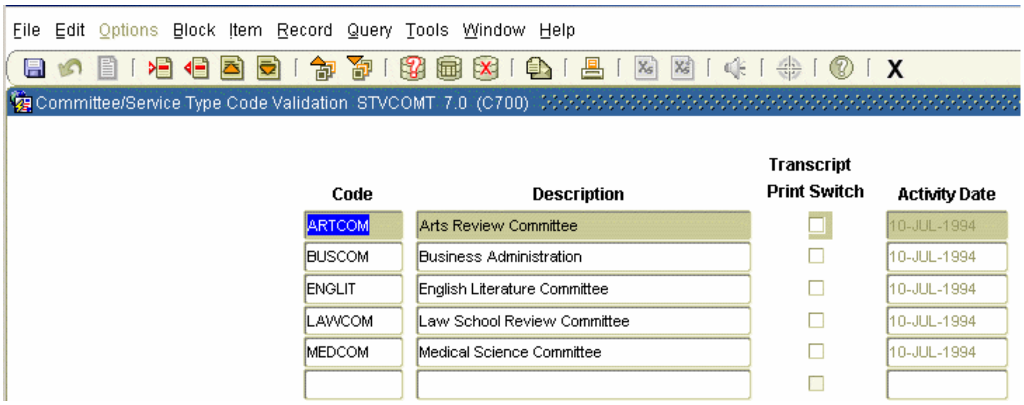
Step	Action
1	Select <u>Other Eligible Benefit Categories</u> from the **Options** menu.
2	Double-click in the **Benefit Category** field and select a category to add to this employee class from the Benefit Category Validation Rule Form, PTVLCAT.
3	To establish another category for this employee class, perform a **Next Record** function and repeat this process.
4	Click the **Save** icon.
5	Click the **Exit** icon.

Establish Committee/Service Codes

Introduction

The Committee/Service Type Validation Form (STVCOMT) is used to enter committee codes.

Banner form



Procedure

Follow these steps to complete the Committee/Service Type Validation Form (STVCOMT).

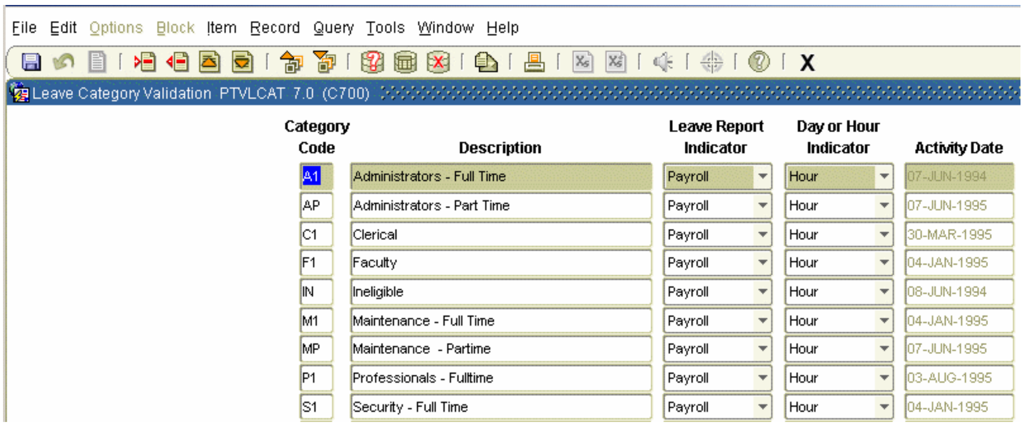
Step	Action
1	Access the Committee/Service Type Validation Form (STVCOMT).
2	Perform an **Insert Record** function.
3	Enter a unique code for the committee being defined in the **Code** field.
4	Enter the committee name in the **Description** field.
5	Do *not* click the **Transcript Print Switch** checkbox.
6	Click the **Save** icon. Note: The activity date field will automatically default to today's date.
7	Click the **Exit** icon.

Leave Category Set Up

Introduction

The Leave Category Validation Form (PTVLCAT) enables you to create leave categories.

Banner form



File Edit Options Block Item Record Query Tools Window Help

Leave Category Validation PTVLCAT 7.0 (C700)

Category Code	Description	Leave Report Indicator	Day or Hour Indicator	Activity Date
A1	Administrators - Full Time	Payroll	Hour	07-JUN-1994
AP	Administrators - Part Time	Payroll	Hour	07-JUN-1995
C1	Clerical	Payroll	Hour	30-MAR-1995
F1	Faculty	Payroll	Hour	04-JAN-1995
IN	Ineligible	Payroll	Hour	08-JUN-1994
M1	Maintenance - Full Time	Payroll	Hour	04-JAN-1995
MP	Maintenance - Partime	Payroll	Hour	07-JUN-1995
P1	Professionals - Fulltime	Payroll	Hour	03-AUG-1995
S1	Security - Full Time	Payroll	Hour	04-JAN-1995

Procedure

Follow these steps to complete the Leave Category Validation Form (PTVLCAT).

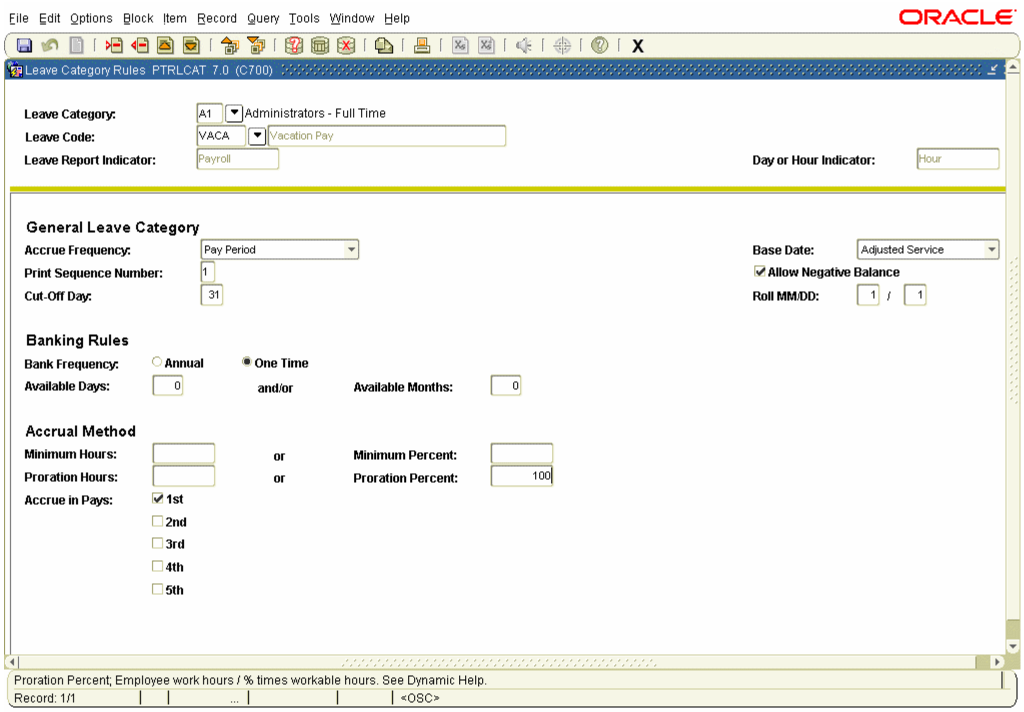
Step	Action
1	Access the Leave Category Validation Form (PTVLCAT).
2	Enter a code for your leave category in the **Category Code** field.
3	Enter the description in your category in the **Description** field.
4	Designate the leave category as applicable to leave reporting or will continue to be processed through payroll in the **Leave Report Indicator** field.
5	Designate whether the leave report will be expressed in units of hours or days in the **Day or Hour Indicator** field. <u>Note</u>: If the **Leave Report Indicator** is *Payroll*, the only option is *Hours*.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Establish Leave Category Rules

Introduction

The Leave Category Rule Form (PTRLCAT) enables you to define a set of leave types available to a specified group of employees.

Banner form



Procedure

Follow these steps to complete the Leave Category Rule Form (PTRLCAT).

Step	Action
1	Access the Leave Category Rule Form (PTRLCAT).
2	Double-click in the **Leave Category** field and select the leave category for which you are establishing a rule.
3	Enter the code of a leave you want to associate with the leave category in the **Leave Code** field.
4	Perform a **Next Block** function.
5	Select how frequently this leave type accrues from the drop-down list in the **Accrue Frequency** field.
6	Select the date to be used to calculate length of service when determining the leave accrual rate for an employee in the **Base Date** field.
7	Enter a number indicating the sequential position of this leave code on the paycheck/direct deposit stub in the **Print Sequence Number** field.

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Procedure, continued

Step	Action
8	Click the **Allow Negative Balance** checkbox to tell the system what to do when an employee takes more leave than is available. Note: Enter a checkmark to pay the employee and allow the leave balance to become negative. Do not enter a checkmark if you want to deduct the excess time from other accrued leave balances and pay the employee.
9	Enter the day of the month by which an employee must begin employment in order to accrue leave for that month in the **Cut-Off Day** field.
10	Select the date on which leave rolls occur in the **Roll MM/DD** field.
11	Select the bank accrual indicatory – *Annual* or *One Time,* in the Bank Frequency radio group.
12	Enter the number of days and/or months an employee must work to be eligible for this leave in the **Available Days AND/OR Available Months** field.
13	Enter the minimum number of hours an employee must work per pay period in order to accrue leave for the pay period in the **Minimum Hours** field.
14	Enter the minimum percentage of the pay period an employee must work in order to accrue leave for the pay period in the **Minimum Percent** field.
15	Enter the proration factor in the **Proration Hours** field.
16	Enter the minimum percentage of a pay period an employee must work in order to receive full leave accrual for the period in the **Proration Percent** field.
17	Click the **Accure in Pays: 1st, 2nd, 3rd, 4th,** and **5th** checkboxes, to specify pay periods during which leave should accrue.
18	Click the **Save** icon.
19	Click the **Exit** icon.

Section C: Day-to-Day Operations

Overview

Purpose	The purpose of this section is to explain the procedures in recording information about employees into the SCT Banner system.
Intended audience	Human Resources office staff who maintain employee records for benefits, leaves, committees, service, employee reviews, and terminations.
Objectives	At the end of this section, you will be able to • establish employee information, including data on status, service dates, leave and benefit categories, leaves, and terminations • maintain information on a job as defined for a specific employee • collect employee review information • change the status of your employee • maintain committee and service information for an employee • view employee historical information.
Prerequisites	You should have • completed the SCT Education Practices computer-based training (CBT) tutorial "Banner 6.x Fundamentals: Navigation and Forms," or have equivalent experience navigating in the SCT Banner system • completed the Human Resources Overview workbook • completed the Human Resources Biographic/Demographic workbook. You will also need to ensure that the rules and validation codes in SCT Banner needed for processing employee records have been set up for you.

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Overview, Continued

In this workbook

These topics are covered in this section.

Process Introduction

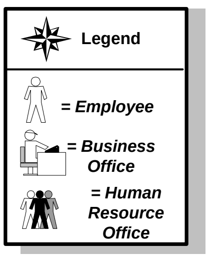
About the process

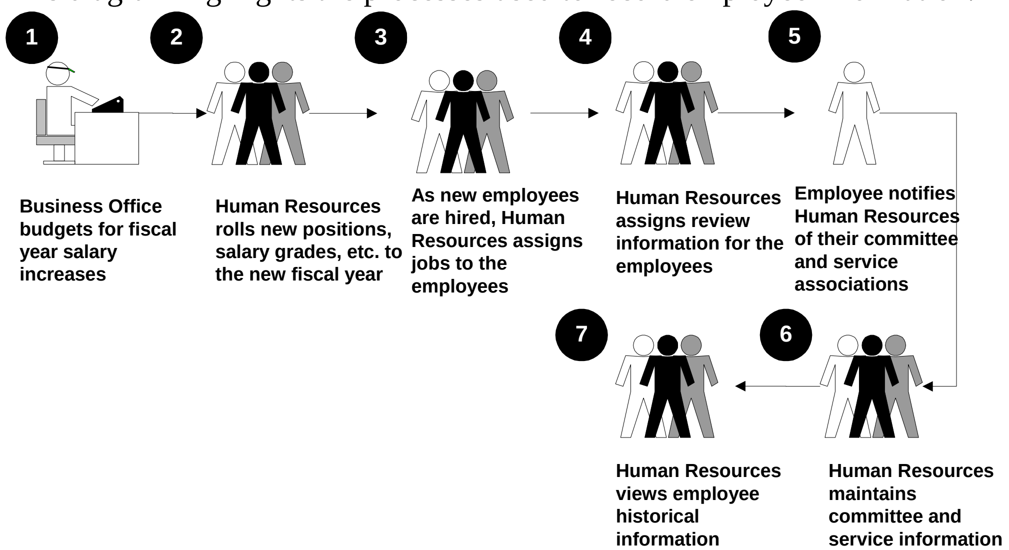
The Human Resource office can:

- record information about an employee such as status, service dates, leave and benefit categories, leaves, and terminations.
- record employee review information.
- specify a specific employee for a specific job.
- change the status of an employee.
- maintain committee and service record for an employee.
- view employee historical information.

Flow diagram

This diagram highlights the processes used to record employee information.





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Process Introduction, Continued

What happens

The stages of the process are described in this table.

Stage	Description
Human Resource Office	
1	Business Office budgets for fiscal year salary increases.
2	**Human Resources** rolls new positions, salary grades, etc. to the new fiscal year.
3	As new employees are hired, **Human Resources** assign jobs to the employees.
4	**Human Resources** also assigns review information for the employee in PEAREVW.
5	Employee notifies Human Resources of their committee and service information.
6	**Human Resources** maintains committee and service information.
7	**Human Resources** views employee historical information.

Date Usage on the Employee Form (PEAEMPL)

Introduction

All dates on PEAEMPL default to the current system date, but can be overridden. The following include common usage for these dates, but these definitions are not mandatory. The definitions are provided as suggestions and are based on common usage of these values. These definitions are not intended to override any client definition requirements.

Date field	Defaults from	Definition
Original Hire Date	**Current Hire**	This date is commonly used as the first date of employment at an enterprise, regardless of employee class. This date can be used for benefit and leave accrual eligibility.
Current Hire Date	**System Date**	This date is commonly the date of current hire or most recent rehire. This date can be used for benefit and leave accrual eligibility. This date is used in the New Hires and Rehires Report (PERHIRE).
Adjusted Service	**Current Hire**	This date is commonly used as the service date for the employee, adjusted for leave of absence and/or times not employed at the enterprise. This date can be used for benefit and leave accrual eligibility.
Seniority	**Current Hire**	The definition of this date varies widely from one enterprise to another. This date can be used for benefit and leave accrual eligibility.
First Work Day	**Current Hire**	This date is commonly used as the first day the employee starts work at the enterprise, it may not be the same as the first day the employee receives pay. The date has no impact on the employee's pay.
Last Work Day	**No Default**	This date is commonly used as the last day the employee is physically at work at the enterprise. It may not be the same as the last day the employee receives pay. This date has no impact on the employee's pay.

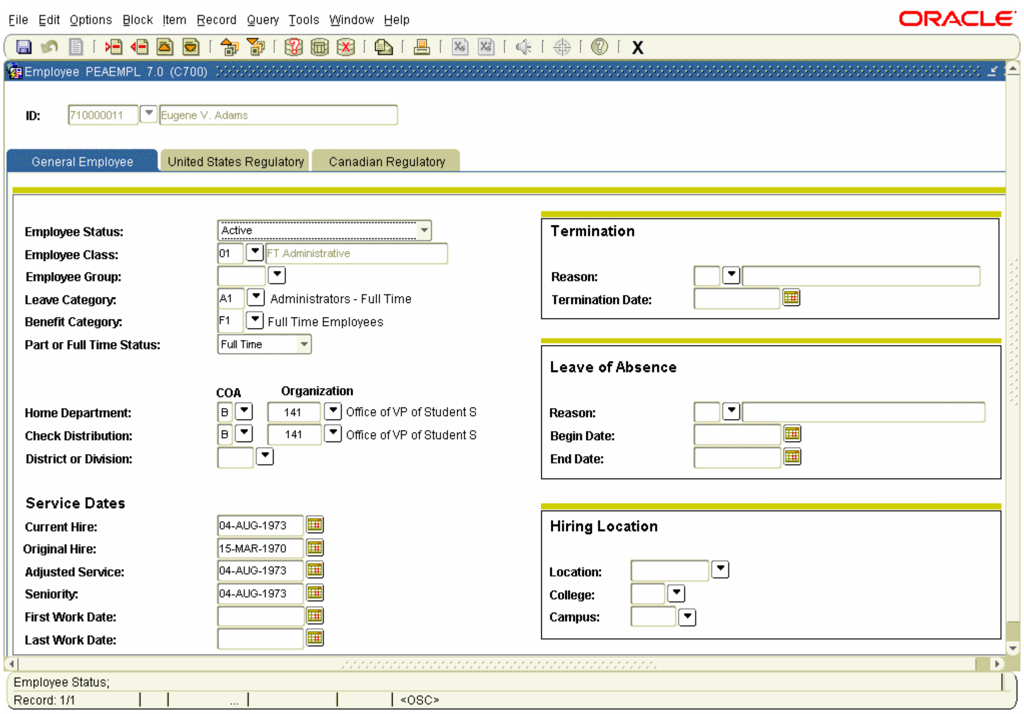
Record Employee Information

Introduction

The Employee Form (PEAEMPL) is used to establish information about an employee's terms of employment. The information collected includes current status, employee class, leave and benefit categories, home and distribution organizations, and service dates.

The Employee Form must be completed before assigning a position to the employee on NBAJOBS.

Banner form



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Record Employee Information, Continued

Procedure

Follow these steps to enter employee information.

Step	Action
1	Access the Employee Form (PEAEMPL).
2	Click the **Search** function in the **ID Field** to access the Employee Search Form, POIIDEN and select the employee.
3	Perform a **Next Block** function. Note: The General Employee Information block maintains data about the employee's employment, and will support only one set of information per person. If no information displays for the employee, the employee must be added to the system.
4	Select the appropriate action from the drop-down list in the **Employee Status** field. Note: An employee's status can be changed. The status of the employee will determine the benefits and type of compensation he receives. If the status is being changed to *Terminated* or to a *Leave* status, a reason must be recorded and the date when the change began must be entered. If an employee is on a leave of absence, you can change the job information instead of the employee information.
5	Select an Employee Class from the Employee Class Query Form, PTQECLS in the **Employee Class** field. Note: The Employee Class is the employee group to which the employee belongs and is the most important field on PEAEMPL. Most higher education enterprises establish between twelve (12) and eighteen (18) employee classes to suit their needs.
6	The values in the **Employee Group, Leave Category, and Benefit Category** fields default based on the Employee Class selected, but may be overridden. Double-click the field to select another value.
7	The value in the **Part or Full Time Status** field defaults based on the Employee Class selected, but may be overridden. Access the pull-down list to select another value. Note: PEAEMPL is the only form where you can adjust leave balances.

Continued on the next page

Procedure, continued

Step	Action
8	Click the **Search** function in the **Home Department COA** field and select a code with an Active Status of *A* from the Chart of Accounts Validation Form (FTVCOAS). Note: If SCT Banner Finance is installed, the chart of accounts must exist on this table. The code, description status, effective date, and termination date are listed on this chart.
9	Click the **Search** function in the **Home Department Organization Code** field to select and return an organization code from the Organization Code Validation Form (FTVORGN). Note: If SCT Banner Finance is installed, the home organization must exist on this form. If SCT Banner Finance is not installed, the code must exist on the **Organization Validation Form** (PTVORGN).
10	The **Check Distribution COA** field indicates the COA (Chart of Accounts) code to which this employee's check is distributed. This defaults from the Home Department COA and can be overridden. Note: The codes from FTVORGN automatically default into the Home Department and Check Distribution fields under the COA and Organization headings.
11	The **Check Distribution Organization Code** defaults from the Home Department Organization Code and can be overridden.
12	Double-click in the **District or Division** field to access the District or Division Code Validation Form (GTVDICD).
13	Click the **Save** icon.

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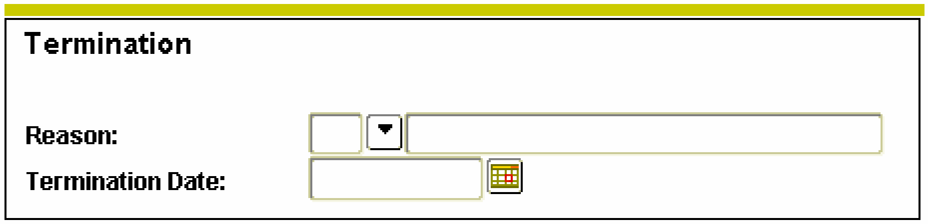
Record Employee Information, Continued

Termination Information



Note: All job records must have a status of *Terminated* before the Employee Record can be terminated.

Procedure

Follow these steps to enter termination information.

Step	Action
1	Click the **Reason Code** field in the Termination block to view the valid reasons from the Termination Reason Rule Form (PTRTREA). For this workbook, we do not want to terminate our employee. Note: PTRTREA defines and codes possible reasons for an employee to be terminated. This form also indicates if the employee is eligible to receive COBRA benefits, and whether or not he/she is eligible for re-hiring at a later date.
2	If the **Reason Code** field has been entered, the **Termination Date** field is required. You would normally enter the last day of employment. Note: If the termination date is predated, the payroll process will automatically update the **Employee Status** field on PEAEMPL to agree with the changed status. If the information is entered after the employee has been terminated, you must also update the **Employee Status** field on PEAEMPL to agree with the changed status.
3	Click the **Save** icon.

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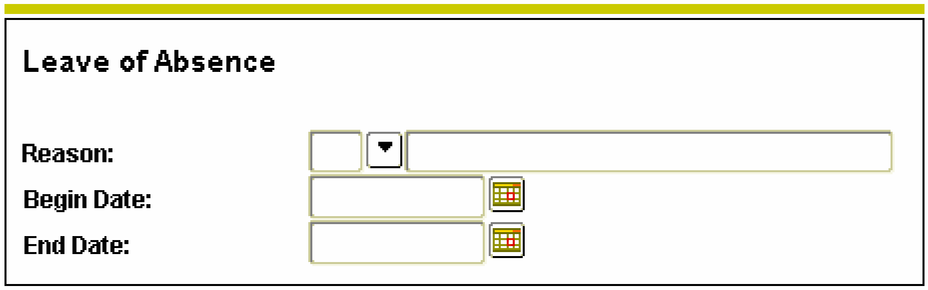
Record Employee Information, Continued

Leave of Absence Information



Note: All job records must have a status of Leave of Absence before the Employee Record can be placed on leave.

Procedure

Follow these steps to enter leave of absence information.

Step	Action
1	Select the **Search** function in the **Reason** field in the Leave of Absence block. Review the descriptions of different leave reasons from the Leave Reason Rule Form (PTRLREA). Note: This rule form indicates eligibility for COBRA coverage. To place the employee on leave, make a selection from the list of reasons. All fields are populated by the system and are protected against change by the user. The PTRLREA also defines the pay and benefit status of the Leave code in the **Employee Status** field.
2	Click the **Cobra Eligible** checkbox to indicate that the leave reason is considered eligible for COBRA benefits.
3	Click the **Return to Work** checkbox to indicate that the employee is eligible to return to work when the leave of absence is over. Note: If the box is blank, that employee may not return to work.
4	Click the **Sabbatical Leave** checkbox to indicate if the leave is a sabbatical.

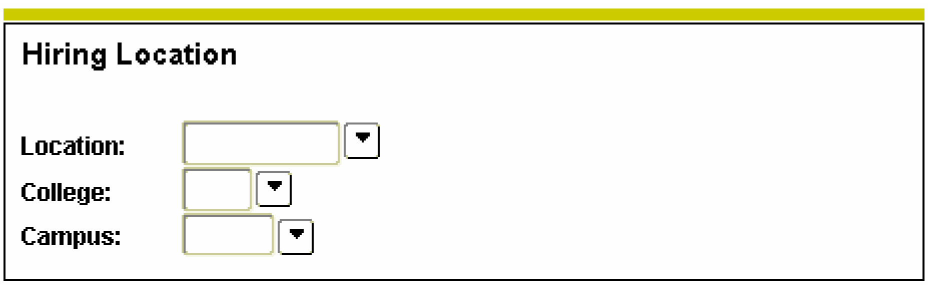
Continued on the next page

Record Employee Information, Continued

Procedure, continued

Step	Action
5	Click the **Tracked on Faculty Form** checkbox to indicate that the user is allowed to enter the Leave Reason Code on the Faculty Action Tracking Form (PEAFACT).
6	Click the **Commitment Fulfillment** checkbox to indicate if there are requirements that must be met for the type of leave being taken, for example, a research paper.
7	Enter the date on which the leave begins in the **Begin Date** field.
8	Enter the date on which the leave ends in the **End Date** field. Note: Make sure that you modify the leave information when the employee returns to work.
9	Click the **Save** icon.

Hiring Location Information



Procedure

Follow these steps to enter a hiring location.

Step	Action
1	Double-click in the **Location** field in the Hiring Location block and select the location where the employee was hired.
2	Double-click in the **College** field and select the employee's college.
3	Double-click in the **Campus** field and select the employee's campus.
4	Click the **Save** icon.

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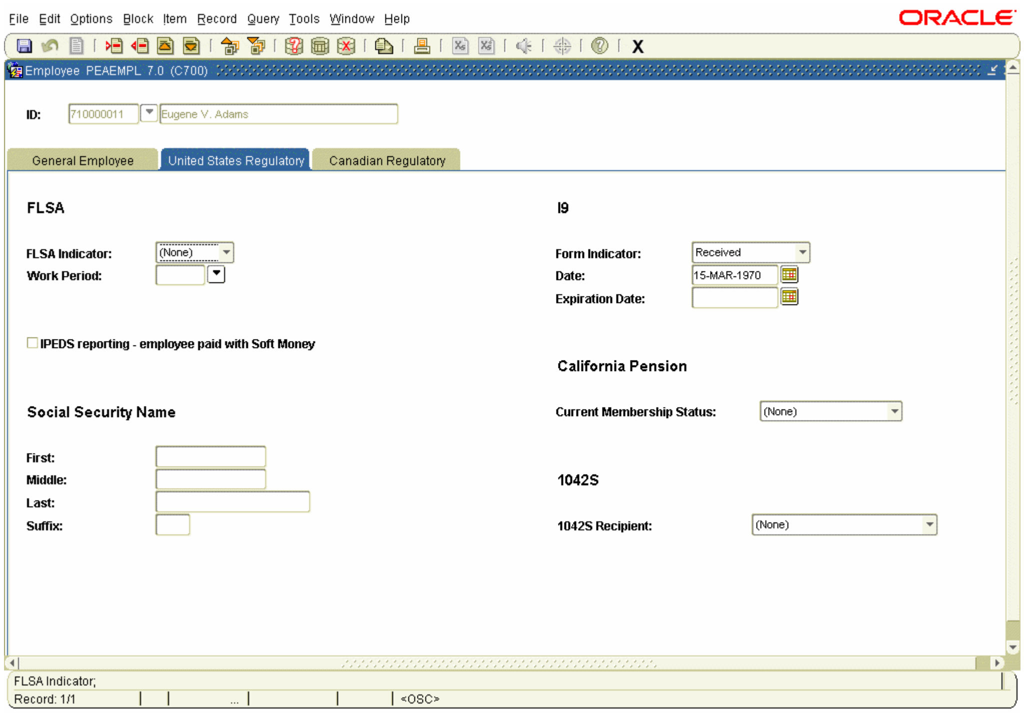
Record Employee Information, Continued

United States Regulatory Information



Procedure

Follow these steps to enter regulatory information for the United States.

Step	Action
1	Select the United States Regulatory tab. Notes: The **U.S. Regulatory Information** window collects data for use in **FLSA**, **I-9**, and **1042-S** reporting. All values in this window are optional.
2	Select a category - *Cash*, *Accrual*, or *None* from the drop-down list in the **FLSA Indicator** field.
3	Double-click in the **Work Period** field to access the Work Period Form (PTRWKPR) and select a code from the values listed for a particular work period for this employee.
4	Select a value - *Received*, *Not Received*, *Temporary*, *Exempt*, and *None* from the drop-down list in the **Form Indicator** field. Note: The field is used for non-residents. If **I-9** information is entered on the employee record, this field must be filled out.
5	The **Date** field will default to the current date upon entry of the **I-9 Form Indicator**.

Continued on the next page

Record Employee Information, Continued

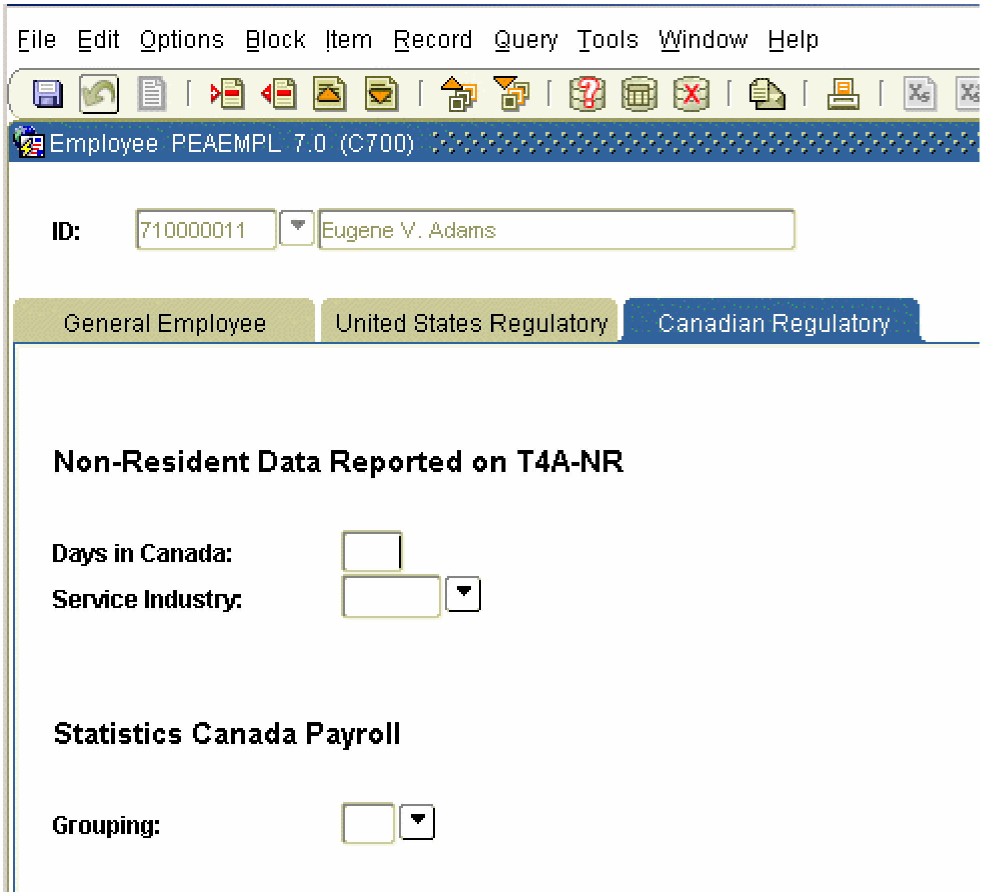
Procedure, continued

Step	Action
6	The **Expire** field is the date the immigration information expires. It must be entered if the **I-9** indicator is *T*.
7	Click the **IPEDS Soft Money** checkbox if the employee is paid in full with Soft Money Funds. Note: **IPEDS** reporting stands for **I**nstitutional **P**ost-**S**econdary **E**ducation **D**ata **S**ummary.
8	Select the current status for California residents only from the drop-down list in the **Current Membership Status** field.
9	Select the type of person or organization that is receiving the 1042 statement from the drop-down list in the **1042S Information** field.
10	In the **Social Security Name** section, enter your person information only if you did not enter your person correctly on PPAIDEN.
11	Click the **Save** icon.

Continued on the next page

Record Employee Information, Continued

Canadian Regulatory Information



Procedure

Follow these steps to enter Canadian regulatory information.

Step	Action
1	Select the Canadian Regulatory tab.
2	Enter the number of days in Canada in the **Days in Canada** field.
3	Double-click in the **Service Industry** field to access the Canadian Non-Resident Service Industry Validation Form (PTVNRSI) and select a code from the values listed.
4	Double-click in the **Grouping** field to access the Statistics Canada Grouping Type Validation Form (PTVSTGR) and select a code from the values listed.
5	Click the **Save** icon.

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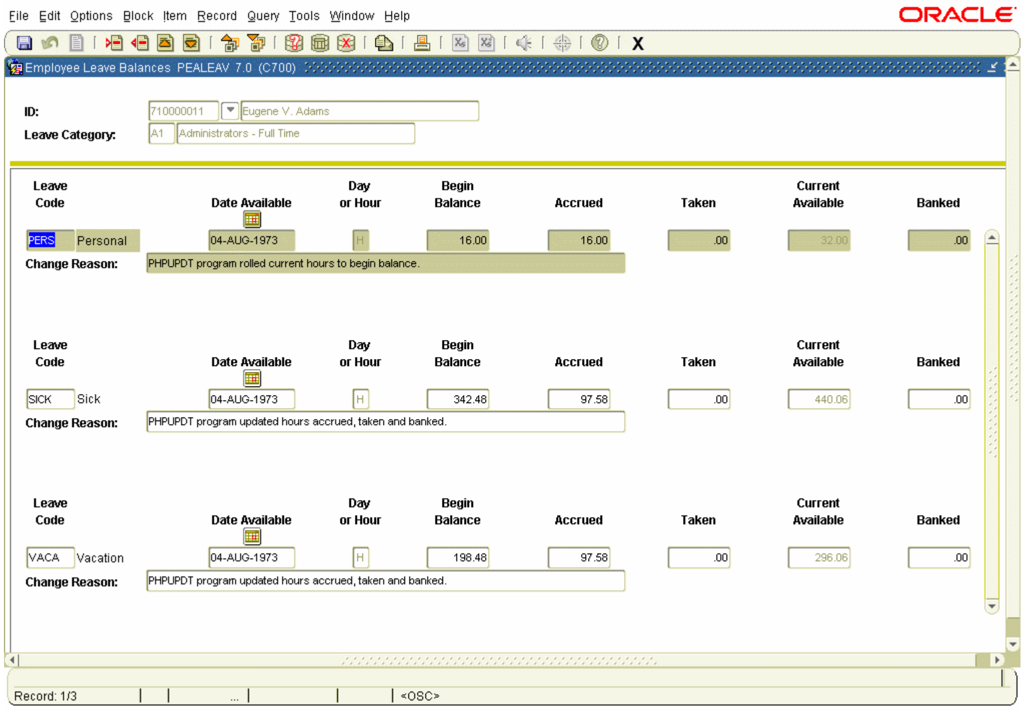
Record Employee Information, Continued

Options – Leave Balance



Procedure

Follow these steps to enter leave information.

Step	Action
1	Select Leave Balance from the **Options** menu. Note: The Leave Balance option allows you to enter leave information. The Leave Balance History option only allows you to view the leave balance.
2	Double-click in the **Leave Code** field to select and return a leave category from the Leave Category Rule Form (PTRLCAT). Note: The values on this form default from the Leave Codes assigned to the Leave Category code entered on the employee record on the first window of this form.
3	The **Date Available** field is the date when the leave time is available for the employee to use. Note: The value of this date is determined by the accrual date value entered in the Leave Category Rule Form (PTRLCAT).

Continued on the next page

Procedure

Follow these steps to complete the process.

Step	Action
4	The available leave hours are displayed in the **Current Available** field. Note: The system does not allow this field to be entered. This is a calculated value: Hours Accrued – Hours Taken.
5	The **Banked** field specifies the number of hours stored for the employee's leave. Note: These hours will be automatically moved to the **Hours Accrued** field on the Date Available.
6	The year-to-date leave hour's accrued default and display in the **Hours Accrued** field.
7	Enter the hours in the **Hours Taken** field.
8	The balance of leave hours at the beginning of the year default in the **Begin Balance** field.
9	Enter the reason for the leave in the **Change Reason** field.
10	Click the **Save** icon. Note: Leave balance area of PEAEMPL is normally updated automatically via payroll processing or the web-based leave balance report, based on the rules set up in PTRLCAT. It is not necessary for you to update or adjust the leave balances manually during normal operations, however, using the procedure outlined above will allow you to make corrections as necessary, such as when payroll adjustments are performed.

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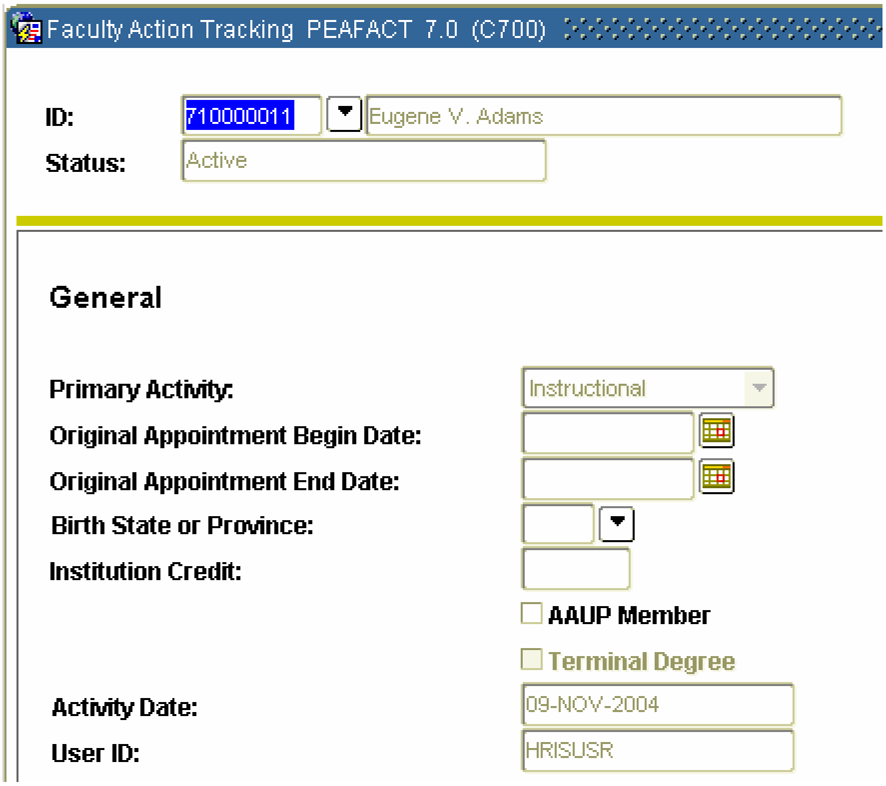
Record Employee Information, Continued

Options – Faculty Information



Procedure

Follow these steps to enter faculty information.

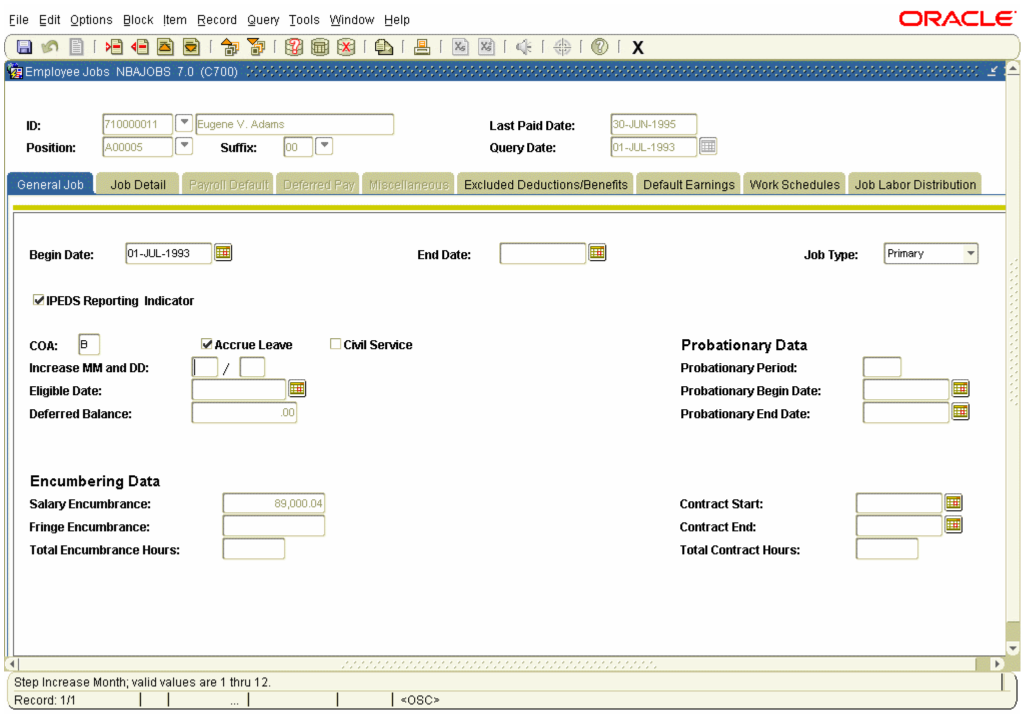
Step	Action
1	Select <u>Faculty Information</u> from the **Options** menu. <u>Notes:</u> The **Faculty Action Tracking Form** (PEAFACT) displays information on faculty actions including primary activity, appointment dates, birth state or province, institution credit, and AAUP membership. Information gathered on this form is also used for these regulatory reporting purposes: *The Annual Statistics Canadian Report* for Canada, and *The Fall Staff Reporting in **IPEDS*** reporting for the United States. If the **Faculty** indicator on the **Installation Rule Form** (PTRINST) has been set to *None*, the system will prevent action on PEAFACT, and faculty actions cannot be tracked.
2	Click the **Save** icon. <u>Note:</u> To view your employee's history, access the Employee History Form, PEIEHIS.

Assign an Employee to a Job

Introduction

The Employee Jobs Form (NBAJOBS) is used to assign a job to the new employee using the new person record and new position and position class in the system. You can use the tabs to access many options, such as the <u>Job Detail</u> tab.

Banner form



Procedure

Follow these steps to assign an employee to a job.

Step	Action
1	Access the Employee Jobs Form (NBAJOBS).
2	Select the **Search** function in the **ID** field to locate your employee on the Employee Search Form, POIIDEN.
3	Select the **Search** function, using the List all Positions option, in the **Position** field to select the appropriate position. <u>Note:</u> In addition to the fields with position numbers and position titles, the boxed fields contain codes that can be viewed. Use the horizontal arrows to scroll through the **Title, Employee Class, COA, Budget Orgn,** and **Description** fields.

Continued on the next page

Procedure, continued

Step	Action
4	Enter *00* in the **Suffix** field. Note: The **Query Date** field will default to the system date.
5	Perform a **Next Block** function.
6	Enter the date that this job was created in the **Begin Date** field.
7	The system defaults to *Primary* in the **Job Type** field. Note: The drop-down list presents three possible categories of job type: *Primary, Secondary,* and *Overload*. Only one primary job is allowed per employee, but he/she may have multiple secondary jobs.
8	Click the **IPEDS Reporting Indicator** checkbox if IPEDS reporting is required.
9	Enter the Chart of Accounts code in the **COA** field.
10	Click the **Accrue Leave** checkbox if leave is to be accrued.
11	Click the **Civil Service** checkbox if this is a civil service position.
12	Enter the Step increase month and day in the **Increase MM and DD** field.
13	Enter the date of the next salary increase in the **Eligible Date** field.
14	Enter the number of days of probation if the employee is on probation in the **Probationary Period** field.
15	Enter the date that the probation begins if the employee is on probation in the **Probationary Begin Date** field.
16	Enter the date the probation will end if the employee is on probation in the **Probationary End Date** field.
17	Enter the hours in the **Total Encumbrance Hours**.
18	Enter the date that the employee started the contract time in the **Contract Start** field.
19	Enter the date that the employee will end the contracting in the **Contract End** field.
20	Enter the employee contracted hours in the **Total Contract Hours** field.

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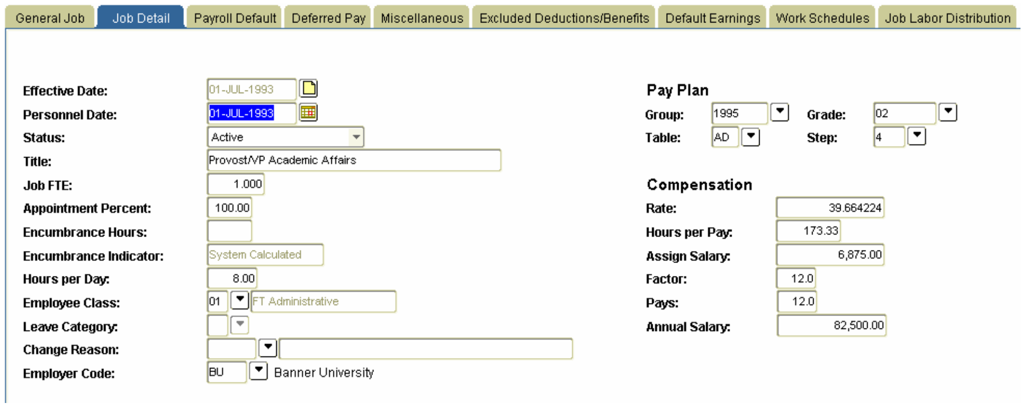
Assign an Employee to a Job, Continued

Job Detail Information



Procedure

Follow these steps to enter job detail information.

Step	Action
1	Select the <u>Job Detail</u> tab. <u>Note:</u> Employee job assignments are recorded in this window. The window has repeating blocks to record multiple jobs by the effective date of each job. The window displays the most recent job assignment that has an effective date less than or equal to the query date in the Key block.
2	The system date defaults to the **Effective Date** field.
3	Enter the date that the job became officially effective in the **Personnel Date** field.
4	The **Status** field displays the current status of the job.
5	The **Title** field defaults from the Position Definition Form (NBAPOSN) but can be overridden.
6	Enter *1* for a full-time employee; enter *.5* or *.25* for part-time employees in the **Job FTE** field.
7	The percentage of full-time appointment to a position defaults from the position record in the **Appointment %** field. <u>Note:</u> The percentage cannot exceed 100%.

Continued on the next page

Assign an Employee to a Job, Continued

Procedure, continued

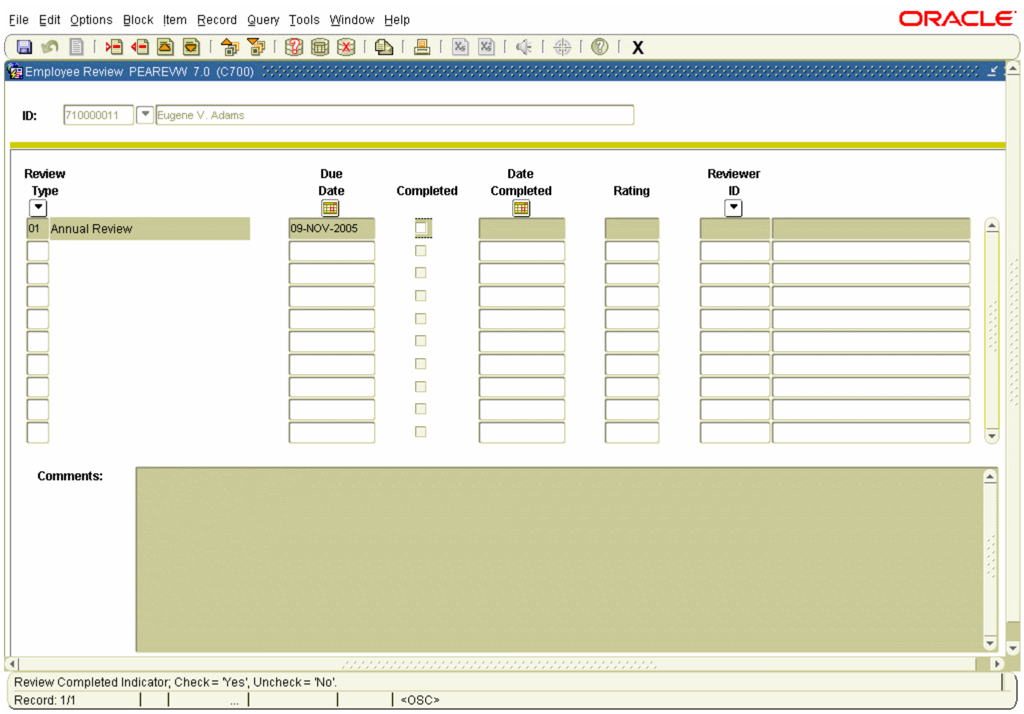
Step	Action
8	Enter the hours in the **Encumbrance Hrs** field.
9	The **Encumbrance Ind** field will default.
10	In the **Hours per Day** field, the value defaults from the Employee Class Rule Form (PTRECLS) but may be overridden.
11	In the **Employee Class** field, the value defaults from the Position Definition Form (NBAPOSN).
12	Double-click in the **Leave Category** field and select the leave category. Note: The value defaults from the Employee Class Rule Form (PTRECLS) but may be overridden.
13	Select the **Search** function in the **Change Reasons** field and select a change reason.
14	Double-click in the **Employer Code** field and select an employer code.
15	Click the **Save** icon.
16	Click the **Exit** icon. Note: In the Compensation information area of the block, the pay period salary is represented. For hourly employees, this is a calculated rate, based on time entry.

Collect Employee Review Information

Introduction

The Employee Review Form (PEAREVW) collects data about a specified employee's performance reviews. Information you can enter includes review type, date due, completion status, rating, and reviewer data. You can also add comments at the bottom of the screen.

Banner form



Procedure

Follow these steps to enter employee review information.

Step	Action
1	Access the Employee Review Form (PEAREVW).
2	Select the **Search** function in the **ID** field to locate your employee on the Employee Search Form, POIIDEN.
3	Perform a **Next Block** function.
4	Double-click in the **Review Type** field and select a review type from the Review Type Validation Form, PTVREVT.
5	Enter the date that the employee's review is due in the **Date Due** field.
6	Click the **Completed** checkbox to indicate the review has been completed, if applicable.
7	Enter the code from your user-defined rating system in the **Rating** field.
8	Select the **Search** function in the **Reviewer ID** field to identify the reviewer's ID from the Employee Search Form, POIIDEN.

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Collect Employee Review Information, Continued

Procedure

Follow these steps to complete the process.

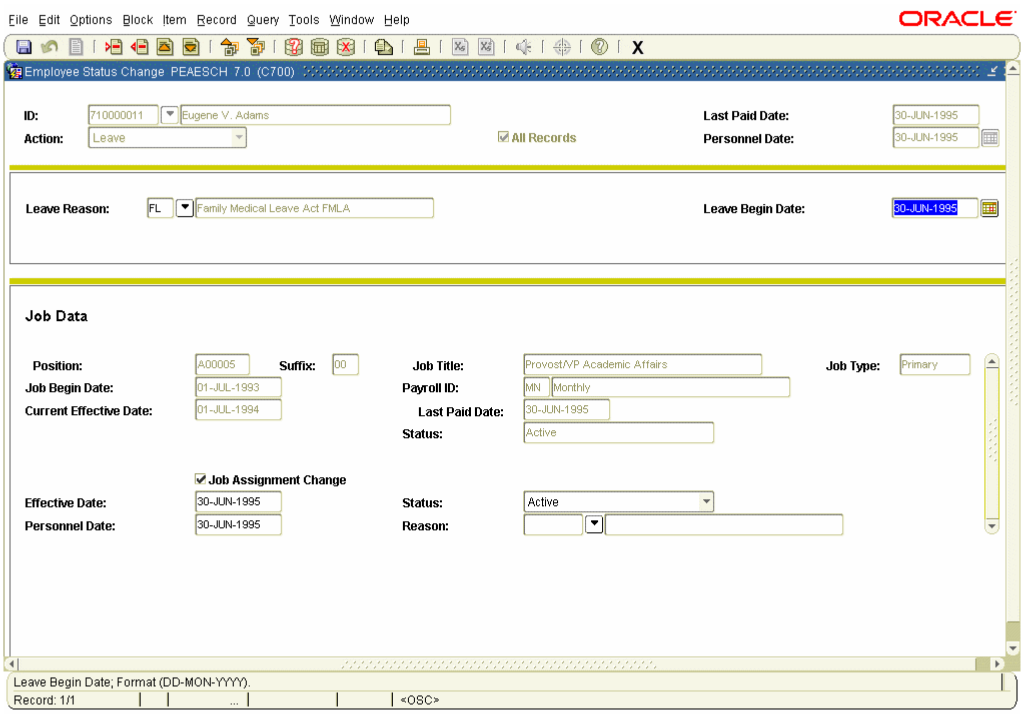
Step	Action
9	Enter detailed free-form comments regarding the review (200 + lines) in the **Comments** field.
10	Click the **Save** icon.
11	Click the **Exit** icon.

Change an Employee's Status

Introduction

The Employee Status Change Form (PEAESCH) allows you to change the employee's status on a single form instead of three forms. With PEAESCH, an employee can be terminated, placed on extended leave, or reactivated from leave status.

Banner form



Procedure

Follow these steps to change an employee status.

Step	Action
1	Access the Employee Status Change Form (PEAESCH). Note: The Key block of PEAESCH not only identifies the employee whose status is to be changed, but also identifies the nature of the change in the **Action** field.
2	Select the **Search** function in the **ID** field and select and return the employee.
3	The **Last Paid** field indicates the very last paid date for all pay IDs for this employee.
4	Select a type of leave from the drop-down list in the **Action** field. Note: The choice entered in the **Action** field above determines the **Next Block** that the system presents for processing.

Continued on the next page

Procedure, continued

Step	Action
5	Select the **All Records?** checkbox. <u>Note</u>: If the **All Records?** checkbox is left blank; you may manually select the records to be affected by the **Action** field. If it is checked, all job and deduction records will automatically be affected by the action.
6	The **Personnel Date** field signifies the actual date on which the action, the status change, should/did take effect.
7	Perform a **Next Block** function.
8	Select the **Search** function in the **Leave Reason** field and enter the reason for the leave. <u>Note:</u> The default value for the field is the current termination reason (if any) on the associated Employee Form (PEAEMPL).
9	Enter the date that the leave will begin in the **Leave Begin Date**.
10	Perform a **Next Block** function.
11	The **Position** and **Suffix** fields display the position and suffix number of the job being described.
12	The **Job Title** field displays the job title of the job being described.
13	The **Job Type** field describes the job type as Primary, Secondary, or Overload.
14	The **Last Paid** field displays the last day for which the employee was paid for the job being described. <u>Notes</u>: The **Job End Date** on the General Job Information window of the associated Employee Jobs Form (NBAJOBS) must be greater than or equal to the **Last Paid** date. The new **Effective Date** entered on NBAJOBS must be greater than or equal to the **Last Paid** date.

Continued on the next page

Procedure, continued

Step	Action
15	Enter the termination date in the **Effective Date** field. <u>Notes:</u> The date in this field is the date the action goes into effect for the payroll activities associated with the job. This date may differ from the actual date an action took place if the paperwork is submitted late. The **Personnel Date** would then reflect the date the action actually occurred. If the **Personnel Date** entered in the Key block is greater than or equal to the **Last Paid** date for the job, the **Personnel Date** is the default value for this field. If the **Personnel Date** is less than the **Last Paid** date, the default value depends on the value in the **Action** field. You can override the default. If you do, the value you enter must be greater than or equal to the **Last Paid** date.
16	The **Status** field defaults. <u>Notes</u>: The system places a default value in the **Status** field according to the action specified in the Key block. If the action is specified as *Leave*, the system defaults the leave status value associated with the leave reason. One of the following values will default into this field: *Active*, *Leave without Pay/with Benefits*, *Leave without Pay/without Benefits*, *Leave with Pay/with Benefits*, *Leave with Part Pay/with Benefits*, or *Terminated*. You may override this value. If the action is specified as *Return from Leave* the default value is *Active*. This can’t be changed if the record’s selected for reactivation.
17	The **Personnel Date** represents the actual date that the action specified in the Key Block took place. <u>Note</u>: The default value is the Key block **Personnel Date**. You may override the default date. If the current **Personnel Date** on the associated Employee Jobs Form (NBAJOBS) record does not match the date entered on PEAESCH, the system updates NBAJOBS with the new value.

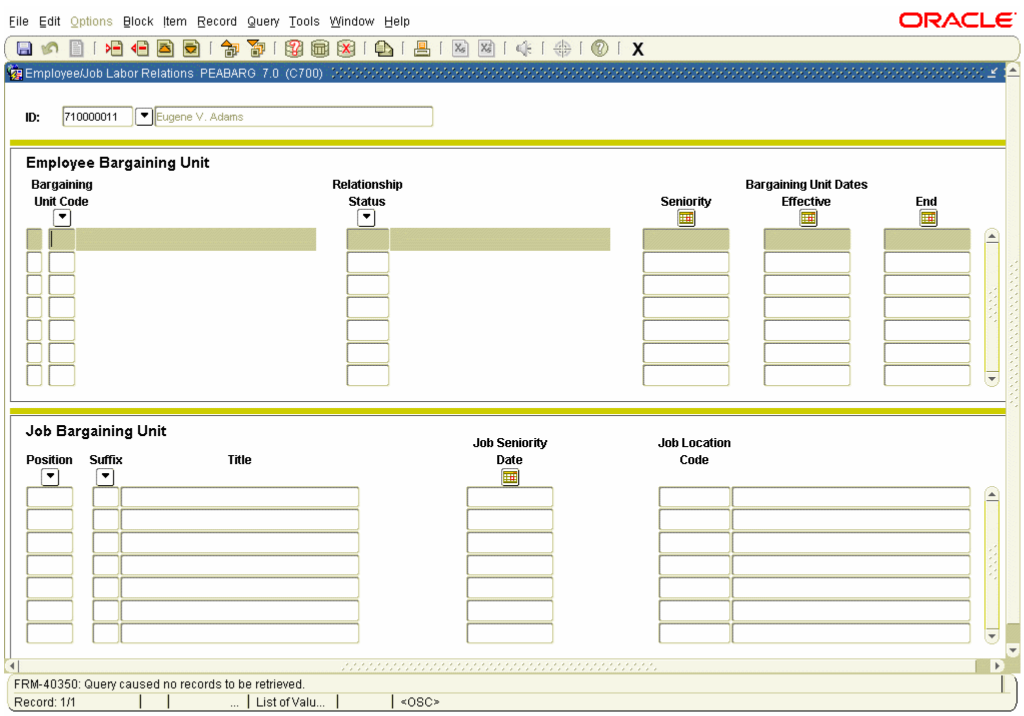
Continued on the next page

Change an Employee's Status, Continued

Procedure, continued

18	The **Reason** field specifies the job change reason and defaults from NBAJOBS. <u>Note:</u> The field is validated against the Job Change Reason Rule Form (PTRJCRE).
19	Click the **Save** icon.

Options – Bargaining Unit Information



Procedure

Follow these steps to enter bargaining unit information.

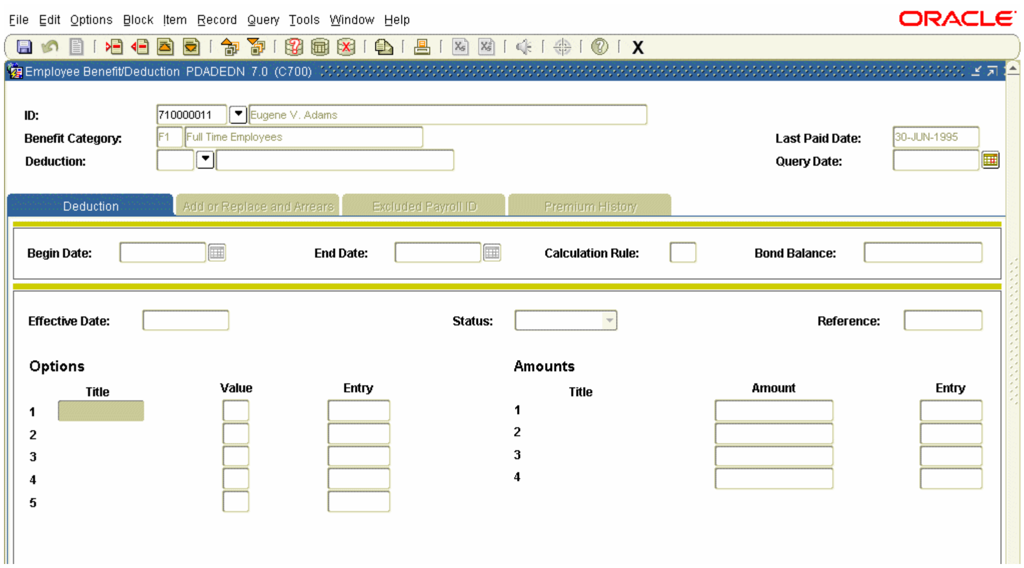
Step	Action
1	Select <u>Bargaining Unit Information</u> from the **Options** menu.
2	Double-click in the **Bargaining Unit Code** field and select a bargaining unit code.
3	Double-click in the **Relationship Status** field and select a relationship status.
4	Make changes to Bargaining unit information as required
5	Click the **Save** icon.

Continued on the next page

Procedure, continued

Step	Action
6	Perform a **Next Block** function.
7	Select the **Search** function in the **Position** and **Suffix** fields and enter the employee's position and suffix.
8	Click the **Save** icon.
9	Click the **Exit** icon.

Options – Employee Deduction Information



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Procedure

Follow these steps to enter employee deduction information.

Step	Action
1	Select Employee Deduction Information from the **Options** menu. Notes: If the Key block indicates the employee is going on leave or returning from leave, the system displays the Employee Deduction Form (PDADEDN). This form is covered in the Benefits/Deductions module. If the Key block indicates the employee is terminated, the system displays the Deduction Information window. The Deduction Information window displays the employee's deduction information based on the date entered in the **Personnel Date** field of the Key block. Records are sorted by the Deduction code. All fields for selected records, except those identified as display-only fields, may be changed. All fields for non-selected records are display-only and may not be changed. If the **All Records?** checkbox in the Key block is not checked, you must select each record individually by checking the box to the left of the **Deduction** field. You may de-select a record that was automatically selected by clicking on the checkbox to clear the field.
2	Select the **Search** function in the **Deduction** field and select a deduction from eligible or employee Deductions.
3	Perform a **Next Block** function twice. Note: The **Effective** field is the Current Effective Date. It must be less than or equal to the Personnel Date.
4	Enter the current status of the deduction– *Active, Waived, Exempt*, or *None* - in the **Status** field.
5	Enter a reference in the **Reference** field.
6	Modify **Options** and **Amounts** as required.
7	Click the **Save** icon.
8	Click the **Exit** icon.

Processing Leaves for Employees

Introduction

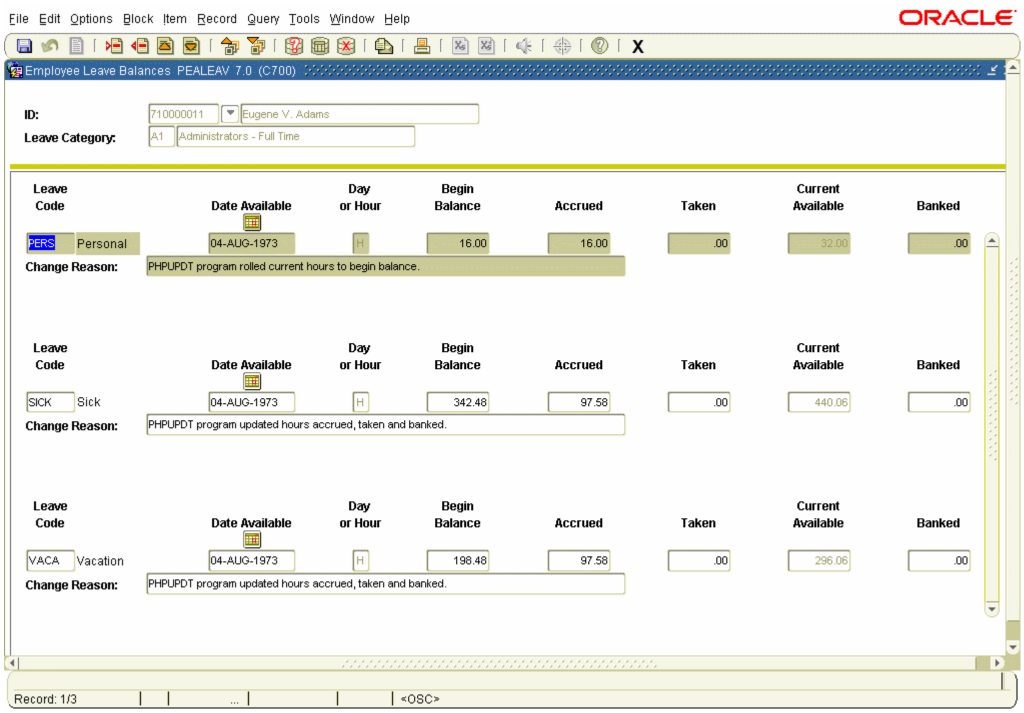
Employees employed in two or more capacities at an enterprise may be eligible to accrue leave in more than one leave category. Consequently, they can take leave using a combination of the leave currently available in the leave category associated with each job.

Note: To process leaves by job, set the Leave Processing Method to "Job" on the Installation Rule Form (PTRINST).

Employee can also report leave independent of the payroll periods in terms of days or hours by accessing the Departmental Leave Report.

Banner form

The Employee Leave Balances Form (PEALEAV) allows you to view, track, and update the leave balance for each leave code associated with each job assignment. The leave balance for each leave code is derived from the leave totals and maintained in the PERJLEV table.



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Processing Leaves for Employees, Continued

Procedure

Follow these steps to update a leave balance.

Step	Action
1	Access the Employee Leave Balances Form (PEALEAV).
2	Enter the ID of the employee or select the **Search** function in the **ID** field.
3	Perform a **Next Block** function.
3	Double-click in the **Leave Code** field and select the leave code.
4	Select the unit of measure in which the leave totals are displayed in the **Day or Hour** field. Note: All leave balances are maintained only in terms of hours in the PERJLEV table in the Leave by Job method. This information is converted and displayed in terms of days as required.
5	Click the **Save** icon.
6	Click the **Exit** icon.

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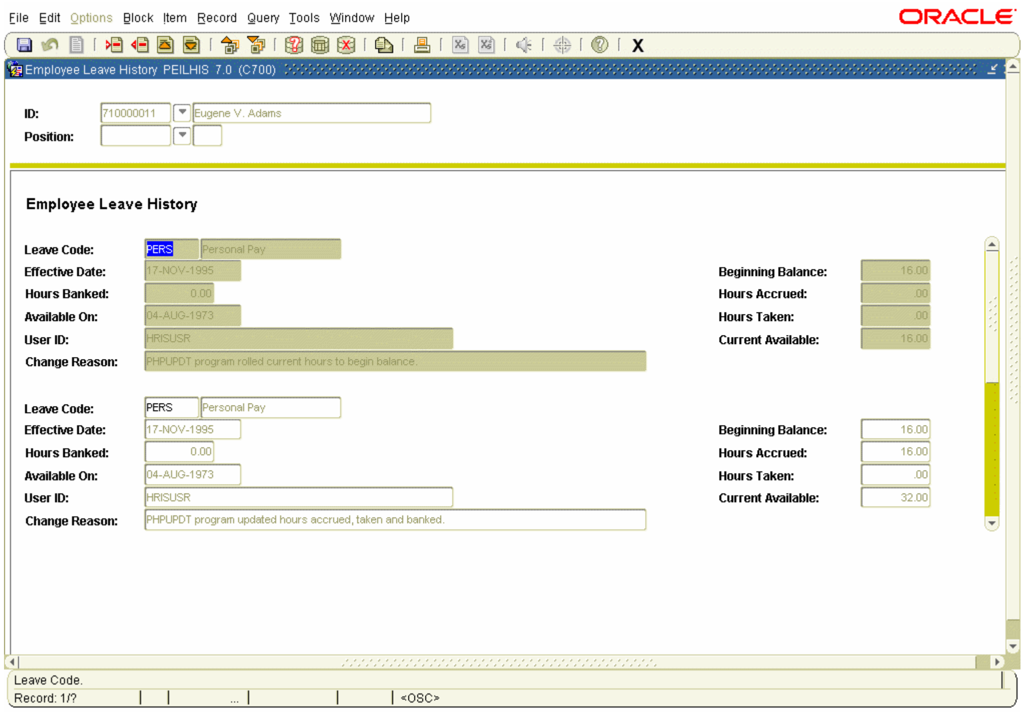
Processing Leaves for Employees, Continued

Options – Leave Balance History



Note: This screen is for review only. To update information on the screen, use PEALEAV.

Procedure

Follow these steps to view leave balance history.

Step	Action
1	Select Leave Balance History from the **Options** menu.
2	Perform a **Next Block** function.
3	View information.
4	Click the **Exit** icon.

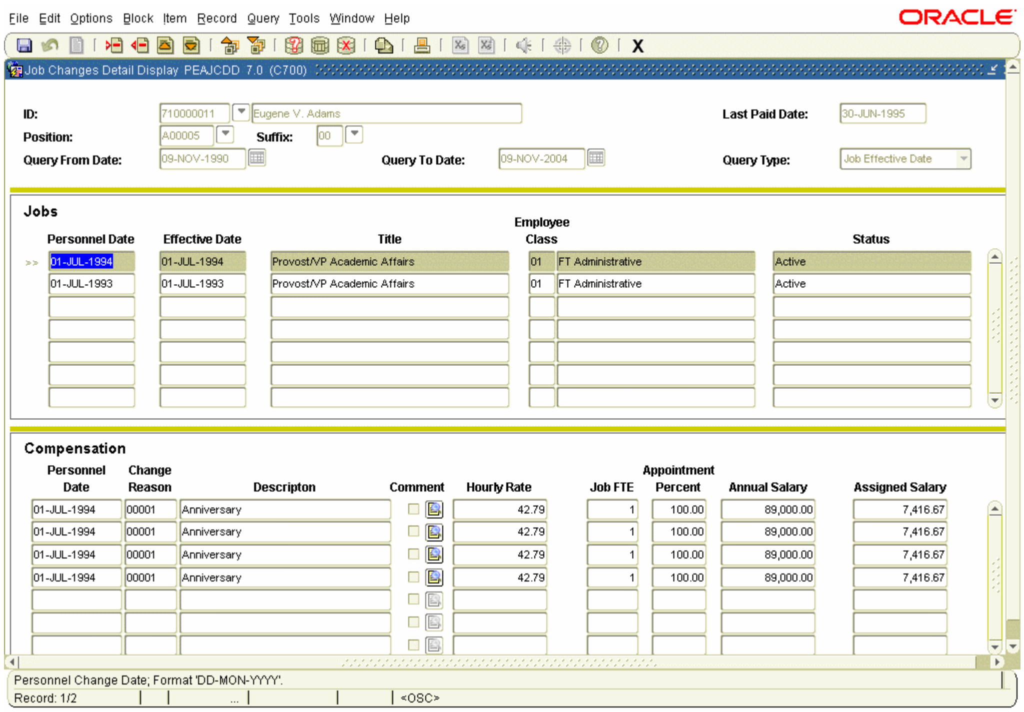
View Employee Job Records

Introduction

The Job Change Detail Display Form (PEAJCDD) allows you to view changes to an employee's job record.

<u>Note:</u> It is recommended that a job change reason code be used to identify all changes made to a job record to provide clear identification for all actions.

Banner form



Procedure

Follow these steps to view changes to an employee's job record.

Step	Action
1	Access the Job Change Detail Display Form (PEAJCDD).
2	Enter the ID of the employee or select the **Search** function in the **ID** field.
3	Enter the position for which you wish to view the sequence of changes made to the employee's job record in the **Position** field.
4	Enter the begin date for the display employee job actions in the **Query Date From** field.
5	Enter the end date for the display employee job actions in the **Query Date To** field.

Continued on the next page

View Employee Job Records, Continued

Procedure, continued

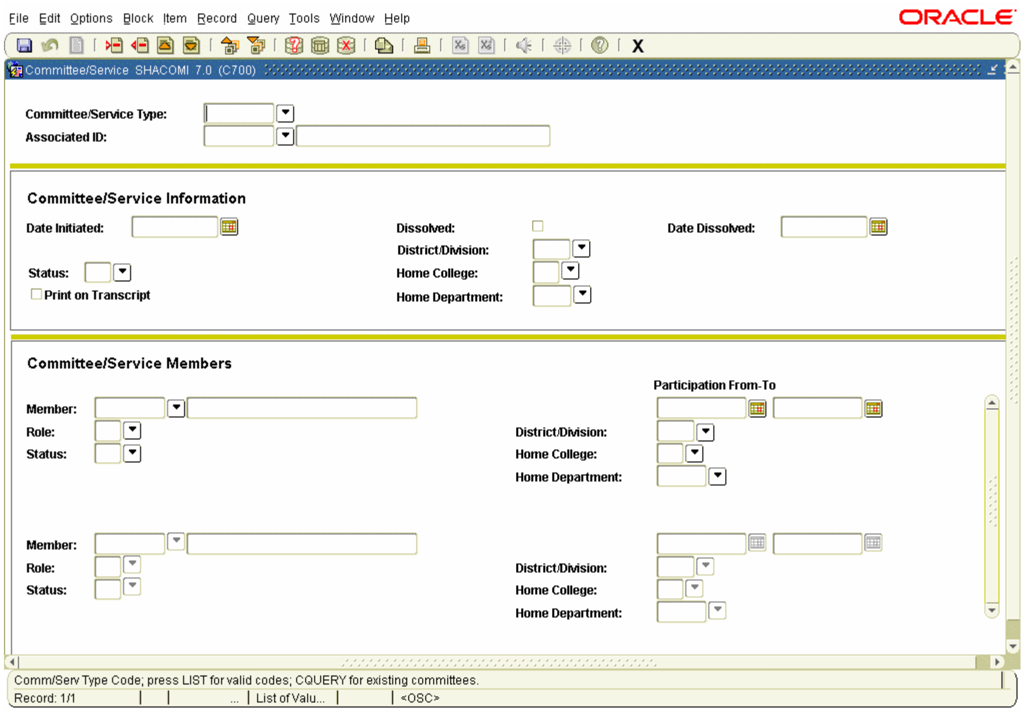
Step	Action
6	Perform a **Next Block** function.
7	View information.
8	Click the **Exit** icon.

Maintain Employee Committee and Service Information

Introduction

The Committee/Service Form (SHACOMI) is used to create and maintain committee/service information by type or by type and ID. When creating a committee or service, it may be stand-alone or affiliated with a person. Examples of committee/service types may be an arts review committee, a promotion committee, or a community service like recycling.

Banner form



Procedure

Follow these steps to create committee/service information.

Step	Action
1	Access the Committee/Service Form (SHACOMI).
2	Double-click in the **Committee/Service Type** field and select a committee service type.
3	Select the **Search** function and the **Employee ID Search** in the **Associated ID** field and select an employee to run the committee from the Employee Search Form, POIIDEN.
4	Perform a **Next Block** function.
5	The **Date Initiated** field will be populated with the current date.
6	In the **Dissolved** box, *do not* enter a checkmark.

Continued on the next page

Maintain Employee Committee and Service Information,
Continued

Procedure, continued

Step	Action
7	*Do not* enter a date in the **Date Dissolved** field.
8	Double-click in the **Status** field, and enter the code to indicate Active.
9	Tab through the **District/Division** field.
10	Double-click in the **Home College** field and select a home college for the committee from the College Code Validation Form, STVCOLL.
11	Double-click in the **Home Department** field and select a home department of the committee from the Department Code Validation Form, STVDEPT.
12	*Do not* enter a checkmark in the **Print on Transcript** checkbox.
13	Click the **Save** icon.
14	Perform a **Next Block** function.
15	Select the **Search** function and the **Employee ID Search** in the **Member** field and select an employee to be a member of the committee from the Employee Search Form, POIIDEN.
16	The system populates the field with the current date in the **Participation From** field.
17	Enter a date two months from the current date in the **Participation To** field.
18	Double-click in the **Role** field and enter a code from the Committee/Service Function Code Validation Form, STVCOMF.
19	Double-click in the **Status** field and enter a status to indicate Active.
20	Tab through the **District/Division** field.
21	Double-click in the **Home College** field and select a home college for the committee from the College Code Validation Form, STVCOLL.
22	Double-click in the **Home Department** field and select a home department of the committee from the Department Code Validation Form, STVDEPT.
23	Click the **Save** icon.
24	Click the **Exit** icon.

Self Check

Directions	Use the information you have learned in this workbook to complete this self check activity.
Question 1: set up	Regular Pay and Dock Pay are the two earnings codes that must be established on the Employee Class Set up. True False
Question 2: set up	What field controls when the employee with jobs in a particular employee class will be paid? a) Job Number field b) Job ID field c) Pay ID field d) Pay Category field
Question 3: day-to-day	Committee codes must have a person associated with it. True False
Question 4: day-to-day	What functions can be done within the Employee Status Change Form, PEAESCH? Employees can be: a) Terminated b) Placed on extended leave c) Reactivated from leave status d) All of the above e) Only b and c

Answer Key

Question 1: **set up**	Regular Pay and Dock Pay are the two earnings codes that must be established on the Employee Class Set up. **True** or False
Question 2: **set up**	What field controls when the employee with jobs in a particular employee class will be paid? a)Job Number field b)Job ID field **c)Pay ID field** d)Pay Category field
Question 3: **day-to-day**	Committee codes must have a person associated with it. True or **False**
Question 4: **day-to-day**	What functions can be done within the Employee Status Change Form, PEAESCH? Employees can be: a)Terminated b)Placed on extended leave c)Reactivated from leave status **d)All of the above** f)Only b and c

Section D: Reference

Overview

Purpose

The purpose of this section is to provide reference materials related to the workbook.

In this section

These topics are covered in this section.

Set Up Forms and Where Used

Purpose Use this table as a guide to the setup forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Employee Class Rule Form	PTRECLS	Employee Form	PEAEMPL
		Employee Jobs Form	NBAJOBS
Committee/Service Codes Form	STVCOMT	Committee/Service Form	SHACOMI
Leave Category Validation Form	PTVLCAT	Employee Form	PEAEMPL
		Employee Jobs Form	NBAJOBS
		Employee Status Change Form	PEAESCH
		Employee Leave Balances Form	PEALEAV
Leave Category Rule Form	PTRLCAT	Employee Form	PEAEMPL
		Employee Jobs Form	NBAJOBS
		Employee Status Change Form	PEAESCH
		Employee Leave Balances Form	PEALEAV

Day-to-Day Forms and Set Up Needed

Purpose Use this table as a guide to the day-to-day forms and the setup forms needed for each.

Day-to-Day Form	Setup Forms Needed
Employee Form (PEAEMPL)	• Employee Class Rule Form (PTRECLS) • Leave Category Validation Form (PTVLCAT) • Leave Category Rule Form (PTRLCAT)
Employee Jobs Form (NBAJOBS)	• Employee Class Rule Form (PTRECLS) • Leave Category Validation Form (PTVLCAT) • Leave Category Rule Form (PTRLCAT)
Committee/Service Form (SHACOMI)	• Committee/Service Codes Form (STVCOMT)
Employee Status Change Form (PEAESCH)	• Leave Category Validation Form (PTVLCAT) • Leave Category Rule Form (PTRLCAT)
Employee Leave Balances Form (PEALEAV)	• Leave Category Validation Form (PTVLCAT) • Leave Category Rule Form (PTRLCAT)

Forms Job Aid

Purpose

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
PEAEMPL	Employee Form	
NBAJOBS	Employee Jobs Form	
SHACOMI	Committee/Service Form	
PEAESCH	Employee Status Change Form	
PEALEAV	Employee Leave Balances Form	
PTRECLS	Employee Class Rule Form	
STVCOMT	Committee/Service Codes Form	
PTVLCAT	Leave Category Validation Form	
PTRLCAT	Leave Category Rule Form	

Release Date

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