Changes to Job, Person, and Position Data

Overview

UW-Madison is complex in its organizational structure. This presentation will provide you an overview of the business process on submissions and approvals of job, person, and position data change requests in the Human Resource System and/or the Job and Employment Management System.

Topics

- Campus Roles
- WiscIT Flowchart
- OHR Approval Chart Chart
- OHR Responsibilities Chart
- What is not a WiscIT
- Communications

Department Role

Large decentralized divisions typically have some HR functions done within their departments/units

Department HR and Payroll professionals should consider the following before requesting changes to person, job, and position changes in HRS by Division HR and Payroll Offices:

- What is my division's business process (email, JEMS Changes)?
- Does my division require supporting documentation?
- Who is my division point of contact?

Division Role

Division HR and Payroll offices are the liaisons to central OHR for all of the departments/units they support. Division HR and Payroll offices are also responsible for:

- Training and developing Department(s) HR and Payroll professionals on division business process
- Answering policy and procedure questions
- Making changes in HRS to job, person, and position data once approved
- Determining whether questions should be escalated to central OHR (OHR Approval Chart) or the Service Center/Affinity Group 1 (AG1)

Office of Human Resources (central) Role

The Office of Human Resources (OHR) supports Division HR and Payroll Offices. There are times when changes to person, job, or position data within HRS require OHR approval. The OHR office role also includes:

- Training and developing Division HR and Payroll offices to understand the business process
- Helping to clarify policy questions that Divisions have
- Approving requests for HRS changes that Divisions then enter into the HRS system
- Determining whether questions should be escalated to AG1

Affinity Group (AG1) Role

The Affinity Group is part of the UW-Service Center. They are responsible for the administration, training, and support for the Human Resource System (HRS). They help to make corrections that UW-Madison cannot make in HRS (when needed).

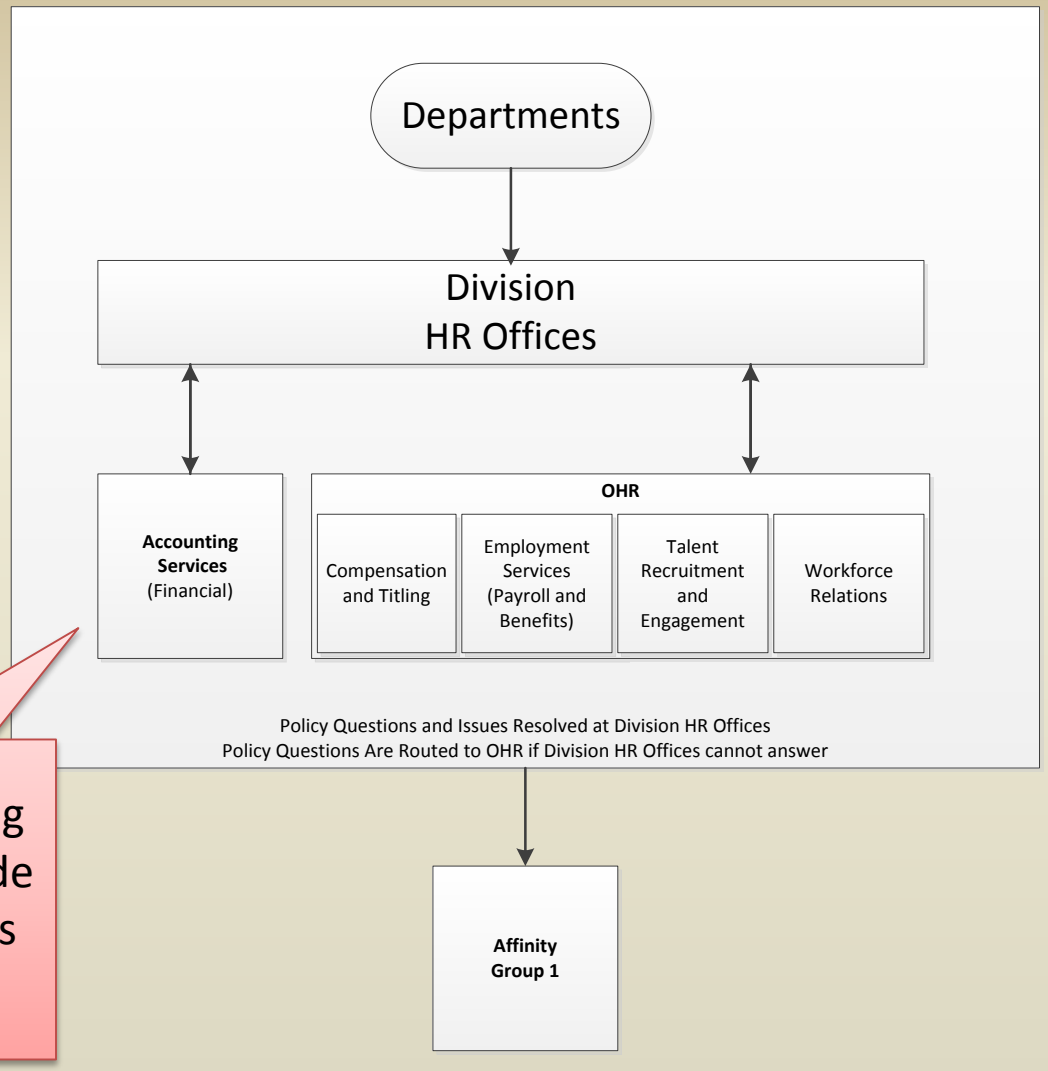
The Affinity Group does not consult or make determinations about OHR policy. Policy questions should be directed to UW-Madison HR Offices.

Department > Division > OHR

There are several affinity groups that are assigned one or more campuses they support. UW-Madison's Affinity Group is:

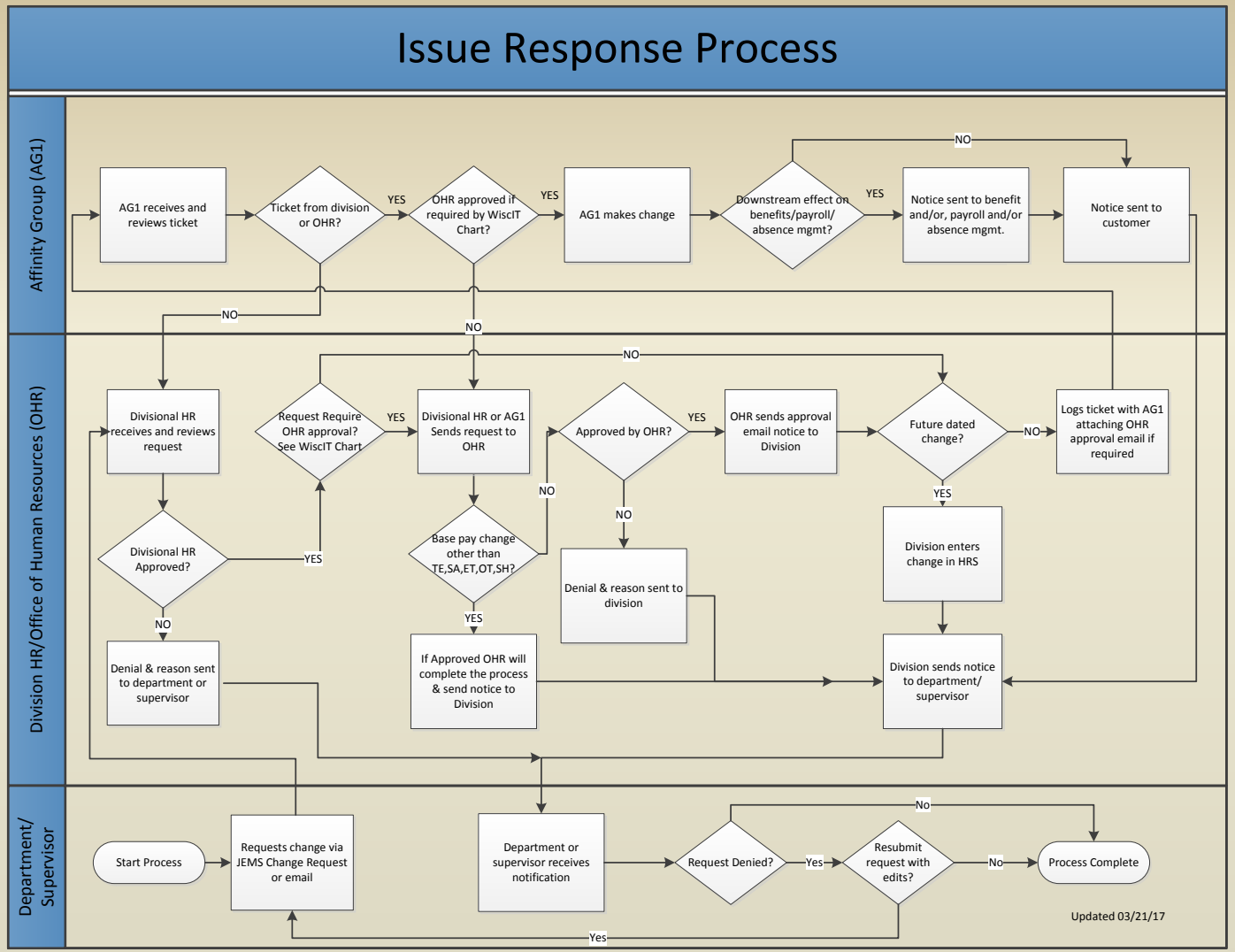
Affinity Group 1:
Call: 888.298.0141 (toll free)
OR 608-262-0600
Email: ag1@uwsa.edu

Affinity Group Workflow



Note: Accounting Services is outside the scope of this training

Affinity Group Workflow



https://uwservice.wisconsin.edu/hrs/jems/

OHR Approval Chart

Some changes to data impact other fields within HRS.

Before Divisions make changes to person, position, or job data within HRS, they should review the OHR Approval Chart to determine if OHR approval is required to make these changes.

Empl Class Name and HRS Code	HRS location	University Staff (CP)	University Staff Finite (CJ)	Temporary Employee (CL)	Faculty (FA)	Academic Staff (AS)	Limited (LI)	Student Assistants (SA)	Post Degree Training (ET)	Student Hourly (SH)	Other (OT)	Other fields possibly impacted	Related KB/Policy	Link to related KB/policy
Subject														
Continuity Change	Position	OHR	OHR	OHR	*	OHR	OHR				OHR	Expected Job End Date	Continuity Overview	https://kb.wisc.edu/hrs/page.php?id=16903
Department Change	Position												Position Data Change	https://kb.wisc.edu/hrs/page.php?id=16622
Emeritus Appointments	Job/POI	OHR	OHR	N/A	OHR*	OHR	OHR	N/A	N/A	N/A	N/A		Resignations and Retirement	http://www.ohr.wisc.edu/polproced/UPPP/2001.
Empl Class Change	Position	OHR	OHR	OHR	N/A	OHR	OHR						Position Data Change	https://kb.wisc.edu/hrs/page.php?id=16622
Expected Job End Date Change	Job	N/A	OHR	OHR	*	OHR	OHR					Continuity, Probation	Maintain EJED	https://kb.wisc.edu/hrs/page.php?id=16409
Faculty Sabbatical	Position	N/A	N/A	N/A	OHR	N/A	N/A	N/A	N/A	N/A	N/A		Faculty Sabbatical	https://kb.wisc.edu/hrs/page.php?id=17072
FLSA Status Change	Position	OHR	OHR	OHR	N/A	N/A	N/A	N/A	N/A	N/A	N/A		Position Data Change	https://kb.wisc.edu/hrs/page.php?id=16622
Hire Date-change to earlier effective date	Job	OHR	OHR	OHR	OHR*	OHR	OHR					Probation, Continuity, Expected Job End Date, Adjusted Continuous Service Date (CP, CJ)		
Hire Date-change to later effective date (continuity 01,03,04) & summer appts	Job	OHR	OHR	OHR								Probation, Adjusted Continuous Service Date (CP, CJ)		
Hire Date-change to later effective date (continuity 02,05--excluding summer appts)	Job	OHR	OHR	OHR	N/A	OHR	OHR					Probation, Continuity, Expected Job End Date, Adjusted Continuous Service Date (CJ)		
JEMS processing issues (never a		OHR	OHR	OHR	OHR	OHR	OHR	OHR	OHR	OHR	OHR			
Job Code Change	Position	OHR	OHR	OHR	OHR	OHR	OHR				OHR	Working Title	Position Data Change	https://kb.wisc.edu/hrs/page.php?id=16622
Job Security/Guaranteed Length Changes	Job	N/A	N/A	N/A	N/A	OHR	N/A	N/A	N/A		N/A		Academic Staff Job Security	https://kb.wisc.edu/ohr/policies/page.php?id=
Leave of Absence Questions (Policy)	Job	OHR	OHR	N/A	OHR	OHR	OHR	OHR	OHR		R		Leave w/o Pay	https://kb.wisc.edu/ohr/policies/page.php?id=
Leave of Absence-Less than 1 Year	Job			N/A									Leave w/o Pay	https://kb.wisc.edu/ohr/policies/page.php?id=
Leave of Absence														

*Departments should contact their Division HR Offices anytime they see OHR Referenced.

OHR Approval Chart Instructions

- Departments are required to contact their Division HR offices anytime OHR is referenced
- Division HR should review the OHR Responsibilities chart to see who in OHR to contact
- Review the **Other Fields Possibly Impacted** column
- Changes to Summer Session and Summer Service appointments go directly to AG1(OHR review/approval no needed)

OHR Approval Chart Example 1

Freda Kahlo works in the Law School in an Academic Staff position for one semester. The department chair would like to extend Freda's appointment through the remainder of the year.

Based on the OHR Approval Chart, the following steps should occur:

- If a Department HR person is requesting the change, they send the request to their Division HR Office
- If a Division HR person is requesting the change, they send the request to central OHR (TRE)
- Once OHR approves, the Division changes the Expected Job End Date in HRS. They would also need to look at continuity based on the other fields possibly impacted

Specific Examples of Linked Updates

John was hired in HRS effective June 1, 2016 into a fixed terminal University Staff appointment to last 1 year. John was not able to start on time, so the department approved a later start date from what was originally in HRS. The job needs to last one year, so the department is requesting a change to both the begin and end date of the appointment.

- First thing that needs to happen is a review of the OHR Approval Chart to see if a change to the start date requires approval
- Based on the OHR Approval chart, the start date needs to change in HRS via a request to AG1
- OHR Approval Chart chart also indicates a review of the Expected Job End Date needs to happen

Specific Examples of Linked Updates

Other things to consider:

- Impacts - Length of job may change benefits eligibility
- Review of continuity needs to happen
- Review PP - Is there a Probationary Period? The date needs to change to reflect the new end date
- Is there an Adjusted Continuous Service Date? The date needs to change to reflect the new hire date

OHR Responsibilites Chart

Once the Division reviews the OHR Approval Chart, they should reference the OHR –Responsibilities Chart.

The OHR Responsibilities chart provides guidance on who the Division HR office should contact in central OHR.

Office of Human Resources - Responsibilities

ACTIVITY	Pre-Vacancy Approval	Post Vacancy Approval/Pre-Hire	Post Hire
Academic Staff Promotion Review	N/A	N/A	C&T
Adjusted Continuous Service Date (ACSD)	N/A	Division HR	TBD
Affordable Care Act (ACA)	Employee Services	Employee Services	Employee Services
Assured Consideration Date	TRE	TRE	N/A
Backup Appointments	N/A	C&T	WR
Continuity: change*	C&T	TRE	TRE
Criminal Background Check: questions	WR	WR	WR
Degree, Qualifications, Experience: change*	C&T	C&T/TRE	N/A
Department: change	C&T	TRE	Division HR
Duties: changes	C&T	C&T/TRE	C&T
Emeritus Policy: questions	N/A	N/A	WR
Emeritus Status: requests (not employment)	N/A	N/A	Office of Mgmt & Budget
Empl Class: change (rare; change LI to AS or vice versa)	C&T	C&T	N/A
Expected Job End Date: change	C&T	TRE	TRE/C&T
Faculty Sabbatical	N/A	N/A	WR
Fair Labor Standards Act (FLSA)	C&T	C&T	C&T
Family & Medical Leave Act (FMLA): questions	N/A	N/A	WR
Graduate Student Employment: questions	Subject-dependent: see listed activity for appropriate office		
Hire Date on PVL Waiver	C&T	TRE	TRE
Hire/Rehire/Transfer Date of a Person	N/A	TRE	TRE
JEMS-HIRE: technical processing issues	N/A	TRE	N/A
Job Code: change	C&T	TRE	C&T
Job Security/Guaranteed Length: change	N/A	N/A	WR
Layoff-Non-renewal: questions	N/A	N/A	WR

https://uwservice.wisconsin.edu/hrs/jems/

https://www.ohr.wisc.edu/udds/

What is NOT a WiscIT?

WiscITs are only requested when AG1 needs to update HRS. The following are examples of what is NOT considered a WiscIT.

System Errors or processing Issues:

JEMS (CHRIS-HR, PVL, JEMS Hire, Rate/Title Change, JEMS Change), TREMS, and Glacier issues are not submitted as WiscITs, these questions should be directed to UW-Madison OHR.

AG1 does not have access to JEMS Hire or JEMS CHRIS-HR and cannot assist with processing errors.

-----Original Message-----
From: Oracle PVPVL2 [mailto:barbara.rust@doit.wisc.edu]
Sent: Thursday, May 18, 2017 2:32 PM
To: ANNIE POWERS <annie.powers@wisc.edu>
Subject: Hire Data for HANHART, ALEXANDER has encountered a processing error in HRS

On May 18, 2017, the following Error Log was generated in HRS. Note that the Hire Data for HANHART, ALEXANDER was not completed and must be re-sent.

A future dated entry exists for the employee's Empl Rcd# 1 which prohibits processing this transaction. Please review the future dated entry or entries and take the appropriate action or email ohrattachments@ohr.wisc.edu for assistance.
A future dated entry exists for the employee's Empl Rcd# 1 which prohibits processing this transaction. Please review the future dated entry or entries and take the appropriate action or email ohrattachments@ohr.wisc.edu for assistance.

Emplid: 00803306
Employee Name: ALEXANDER HANHART
PVL Number: 90811
Job Code/Title: D92FN-ASSOC FACULTY ASSOC
Empl Class: Academic Staff
Department: A485400 / L&S / Mathematics
Full Time Salary: $63,000.000 Summer Service
FTE: .5
Continuity Status: 02A: Fixed Term < 1 sem/6 mths
Job Effective Date: May 23, 2016

What is NOT a WiscIT?

Issues which require prior approval by OHR (Per WiscIT Chart)

If the WiscIT chart indicated OHR approval is needed, these questions/request are not submitted as WiscITs (send an email to the OHR Rep, instead)

- Once OHR approves the change and the division determines correction mode is needed to update HRS, an email to AG1 to create a WiscIT would occur at that time (must include email showing OHR approved the change)

Empl Class Name and HRS Code	HRS location	University Staff (CP)	University Staff Finite (CJ)	Temporary Employee (CL)	Faculty (FA)	Academic Staff (AS)	Limited (LI)	Student Assistants (SA)	Post Degree Training (ET)	Student Hourly (SH)	Other (OT)
Subject											
Continuity Change	Position	OHR	OHR	OHR	*	OHR	OHR				OHR

Policy Questions

HR Policy questions are not handled by AG1 and need to be routed to OHR

https://kb.wisc.edu/ohr/policies/

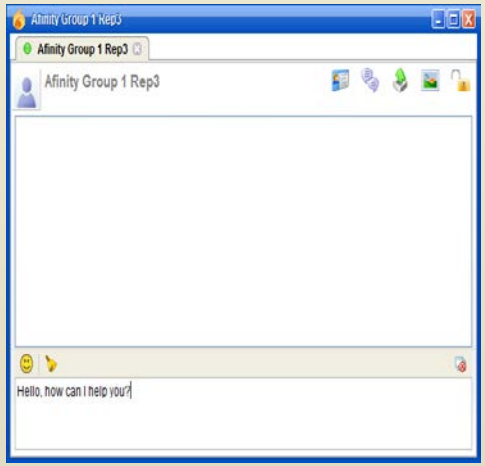
Requests to OHR

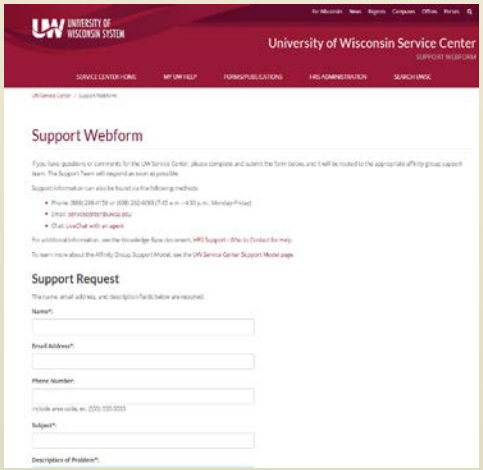
- Emails to OHR should come from Division HR points of contact.
  - Include in Subject Line: Empl ID, Empl Record #, UDDS, and Empl Class
- Identify the issue, PD/PVL# and all the impacted fields in HRS
- Provide justification/necessary documentation for the change
- Indicate Division HR support for the change (if forwarding email from department)
- If approved by OHR, one of the following will occur:
  - OHR will reply with approval so Division HR can make changes in HRS
  - OHR will make changes that Division HR cannot make in HRS
  - OHR will submit request to AG1 or respond to the Division letting them know they have the okay to submit the request to AG1 (if the Division HR cannot make changes in HRS)

Channels for Contacting UWSC

There are a different channels for contacting the UW-Service Center.

Each channel is dependent on the users role and responsibilities.





Requests to AG1

Subject Line

- Emails to AG1 may come from Divisions or central OHR
  - Include in Subject Line: Name, Empl ID (8 digits; keep 00), and Empl Record #

    Example: W-2 Inquiry-John Smith-00234567/0

Provide detailed information regarding request/issue

- Specific action needed or attempted
- Effective dates of actions needed
- Screenshots of any error messages
- Provide justification/necessary documentation for the change
- Indicate OHR support for the change (if forwarding email from OHR)
- If approved by AG1:
  - AG1 will reply to the person who submitted the WiscIT once the work has been completed.

WiscIT AG1 Communication – Best Practice

Adding Additional Info / Checking Status

- Reply to WiscIT email for follow-ups
- When calling:
  - Reference the WiscIT number initially assigned
  - Include full name, Empl ID, Empl Rcd
- Do not cc additional Service Center staff
- Do not include SSN or other restricted info

WiscIT AG1 Communication – Next Steps

Upon creation of a WiscIT, the requestor will be notified with the following information:

- Acknowledgement of receipt
- The WiscIT number assigned
- And one of the following:
  - A request for additional information
  - The Service Center incident escalation information
  - The resolution to the incident

WiscIT AG1 Communication - Resolutions

- When a WiscIT is resolved, the requestor will be notified via email of its resolution and closure.

- If a WiscIT has been closed and there is additional follow up needed, reply to the email received closing the WiscIT. The owned of the WiscIT will receive your message.

- If you encounter a similar problem with a new program, employee, payroll period, etc., send a new email directly to your AG1 support mailbox. This is a separate instance and needs to be tracked and treated as a new WiscIT.

What if

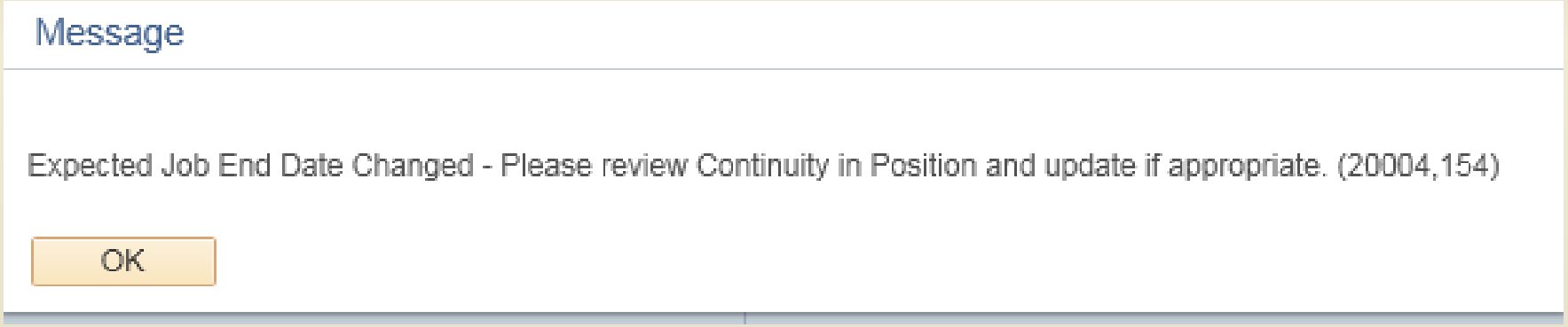
This business process helps to ensure timely and correct adjustments in HRS.

If this process is not followed,

- There could be a delay in changes
- Impacts to other functional areas (i.e., benefits, payroll)
- Impacts to the employee

Review Warning Messages in HRS

- Soft edits provide reminders and should be reviewed (i.e., when updating EJED, there is a reminder to review continuity)



Review Warning Messages in HRS

Message

Warning -- Job effective date is equal to today's date (20004,152)

The row you are adding on the Job has an effective date equal to today's date. If you do not want to use today's date, click Cancel to return to the previous page without saving and change the date to the desired date.

OK Cancel

Message

Employee to be terminated. (20004,155)

You have just entered a termination row.
If this is a Retirement, all records need to be terminated.
If other jobs remain active, the Benefits Primary Flag will automatically be assigned to the lowest active job record. A Benefits Coordinator should review and make any adjustments needed.
If this is a resignation, be sure the employee is not transferring to another Department/Division/Campus.

OK

Affirmations/Questions