

Personnel Management

Total allocated time: 1 hour and 15 minutes, including questions

Session Objective

Demonstrate personnel administration capabilities, including person master record and single entry of data across modules. Provide an overview of employee record lifecycle and relationship management: onboarding, classification changes, compensation changes, transfers, and separations.

Assumptions: Personnel actions can be requested by management or by employees, and can be approved, denied, or approved at something other than what was requested (i.e. 15% salary increase may have been requested, however was approved at 10%). Personnel actions can also be effective in the future, as well as retroactive actions effective in the past.

Items to Demonstrate

1. How does an applicant, an administrator, and human resources participate in the onboarding process? Include any tools available to show complete/incomplete activities (such as a dashboard).
 - a. How is the onboarding process adjusted for a new hire, rehire, and transfer?
 - b. Include how the system supports onboarding activities (i.e. facilitating orientation, training, issuing equipment, security and access, payroll data, benefits enrollment, etc.) prior to and after actual start date.
2. Discuss/Demonstrate how to manage work authorization process, including tools to notify employees and administrators of actions required, expiring documents, and document storage. Demonstrate:
 - a. How updates to I-9 records are made, created, and stored.
 - b. How records are automatically archived or deleted.
3. Demonstrate tracking and managing different types of appointment assigned to an individual. Include the following:
 - a. Managing employees in concurrent positions or in more than one employee type (e.g. a civil service employee takes a temporary hourly position for additional work. Demonstrate what the supervisor in both departments can view of the other appointment, such as hours worked).
 - b. Managing employees in concurrent positions that exceed 100% fte (i.e. overload).
 - c. Tracking and automatically adjusting probationary periods for civil service employees.
 - d. Appointment history in an employee record (for example, a retired employee is rehired in a new position).
4. Demonstrate different types of personnel actions (i.e. a change in position title (promotion or demotion), salary, temporary stipend, full-time equivalency, fair labor standards act, etc.) from creation, routing, and through finalization. Include how the information is viewed across relevant modules (i.e. position management, payroll, benefits, etc.).

- a. For a retroactive salary change, how is the change reported to the employee, the unit, and payroll, and how is an “effective date” actioned so the adjustment is only valid for a set date moving forward and not for all of the employee’s history?
 - b. Show the link between personnel and appointment changes across the system (i.e. position management, payroll, etc.). Include how personnel actions trigger additional processes (i.e. employee type change from civil service to administrative professional triggers retirement options, leave accrual changes, and new rule sets).
 - c. What communication tools are available within the system to notify employees of approved actions? Include ability to provide different language depending on the action, employee type, FLSA status, timing of action, etc. (i.e. appeal options should be included for actions on a staff position, and PID language may be needed for retroactive actions depending on employee type and type of action).
5. For salary increases, demonstrate the interaction of salary/compensation processes with the following:
- a. Date of event (starting with date of hire through present/term date).
 - b. Type of event (hire, rehire, merit increase, promotion/demotion, transfer, equity adjustment, salary grade change, leave of absence/return from leave of absence, Time% change, termination/retirement/lay-off/deceased/etc., over base payment, bonus payment).
 - c. Details after event, including job title, position number, dollar amount and percent increase/decrease, and base salary.
6. Show how the personnel/appointment history of an employee is tracked, including all associated position information, along with change reasons and comment history.
- a. Calculate length of service and seniority in multiple ways utilizing different business processes.
7. Discuss/Demonstrate how an employee, an administrator, and human resources participate in the offboarding process? Include any tools available to show complete/incomplete activities (such as a dashboard).
- a. Discuss/Demonstrate how the system supports offboarding activities (i.e. retrieving issued equipment and keys, removing security and access, automatic calculation of pay and accrued/remaining vacation time for final payout, notifications/alerts for balances owed such as parking or library, cancelation of benefits and automatic COBRA notification, etc.) prior to and after end date.
 - b. How is the offboarding process adjusted for retirement, death, voluntary separations, and involuntary separations?