

RECAP

Personnel Information Exchange

Meeting Date: June 30, 2009

Time: 10:30 am – 12:00 pm

Location: Labor and Industries Bldg.

ITEM	ACTION, DISCUSSION
DAS HRSD E-Recruit Project	
Steve Schafer	Brief information was given on the status of E-Recruitment project. **See Attachment**.
DAS HRIS Project	
Jeanette Miley	Discussed HRIS project and process flows that were created as tools to help identify personnel action processes. **See Attachment**.
PICS and PPDB	
Kim Courtright Bonnie Lanning	Basic overview of the PICS process and what needs to be done in PPDB at the agency level. **See Attachment**.
PPDB Security Review	
Brandon Dolquist Tamara Loyola	DAS HR Systems will begin audits of Agency policies and practices related to PPDB data and PPDB access. The review is to ensure that the security of PPDB data is maintained at the agency level down to the user. We will be contacting agencies with access to schedule reviews.
PPDB Web Reporting	
Brandon Dolquist	The web reports matrix was created which shows all the current PPDB web reports that are available and gives a brief description of what data is given in the report and how frequent the report is updated. The Labor Cost Change report, the newest addition to the web reports, was introduced. The report shows labor cost changes processed for the previous month, showing old to new and the effective date of the change.
PPDB	
Brandon Dolquist	A warning message is being tested to display for temporary appointments upon entry. The message warns the user about checking if the employee had permanent status in the previous month where the payroll cycle has not closed yet. Entering a temporary appointment concurrent to a payroll cycle which has not closed for the month that the permanent appointment was active in will cause problems in the payroll system. The temporary appointment must be purged in order for payroll to calculate correctly for the permanent position. Once the payroll cycle closes for that month then the temporary appointment can be re-entered. A communication will be sent once the warning message has been

	<p>implemented.</p> <p>A warning message is being tested to display anytime the differential pay amount is a percentage and the percentage is 5% or greater. The warning message is being created to bring more attention to the percentage amount when entering or adjusting the percentage amount of differential pay. We hope this will minimize errors when entering percentage amounts as it is easy to enter them incorrectly. Example 000.050 = 5%; 000.500 = 50%. A communication will be sent once the warning message has been implemented.</p> <p>We have fully suppressed the SSN from printing on the personnel action turnarounds. Even if you print page 1 of the personnel action at your agency it will not display at all.</p>
Mgt / Exec Pay Reduction Restore	
Donna Lantz	<p>HR Systems will be processing the restoration of the March through June 2009 pay reductions in lieu of furlough effective July 1st, 2009. The PA code used will be 825 and personnel action turnarounds will be generated. All pay reductions in lieu of furlough for the July through August period will be entered prior to preliminary cutoff for July. A report will be generated and distributed to agencies showing all reductions in lieu of furlough that have been processed.</p>
Labor Cost Crosswalk 2009-2011 Biennium	
Brandon Dolquist	<p>A memo was sent out by OSPS for agencies who track their payroll labor costs for the 09-11 Biennium and/or the 09-10 Fiscal Year. OSPS will be entering the labor cost changes for agencies based upon their instruction. Changes will be uploaded to the personnel system (PPDB), and then into the OSPS and will be effective in both systems July 1, 2009, for the payroll period July paid August 2009 (actual pay date 7/31/09). For agencies that provide no instruction to OSPS a default crosswalk will be processed to change the biennial factor from 09 to 11 on all payroll labor cost numbers.</p>

Next meeting:

September 24th, 2009

10:30 am – 12:00 pm

Labor & Industries Building, Rm. 260

DAS HRSD E-Recruit Project

July 2009

Fact Sheet

Project update:

Completed a special procurement process and have identified an apparent successful proposer

Identified and hosted an initial E-Recruit Project Steering Committee

Completed contract negotiations and signed a contract with NeoGov on June 29, 2009

What is the E-Recruit Project?

The E-Recruit project has been launched with the vision of providing the State of Oregon with an online recruiting tool that will provide applicants with a modern online recruiting process, provide agency HR staff with greatly improved recruiting capabilities, and ease the workload burden created by the current paper application process. DAS is committed to the success of the E-Recruit project and has the support of all key state agencies.

Why Replace the Existing Application Process?

For years, the state's paper driven application process has remained unchanged despite significant advances in available technology and HR business needs. In the current economic situation facing all state agencies, the amount of applications per recruitment has significantly increased, reaching upwards of 300 or more applications for each announcement and often overwhelming agency recruiting staff. This has significantly increased the workload for all HR and agency staff who "touch" the recruiting process and diminished the ability of the state to quickly identify and retain well qualified staff.

The Applicant Recruitment and Certification (Appl/Cert) system is a legacy COBOL application that has been in service for approximately 30 years. The existing Appl/Cert system lacks needed functionality, flexibility and depends on outdated legacy technology. The current system was designed to meet recruiting objectives at a time when the State had fewer data requirements.

The Appl/Cert system is nearing the end of its useful life. The design and complexity, as well as the business rules that have been established, continue to be major contributing factors to the lack of flexibility in this system. Additionally, key technical and business personnel who have detailed knowledge of the system have been identified for budget reductions beginning in May 2009. Replacement staff will be increasingly difficult to recruit and hire based on the outdated operating technology of the Appl/Cert system and limited funding.

What can you expect?

Once completed the E-Recruit project will provide increased functionality to agency staff and employees. Some of the improvements you will see are:

- Increased online customer service to applicants
- Time to hire is reduced by approximately 33%
- Automated workflow-driven processes
- Promotes sustainability by reducing the need for paper applications.
- Improved reporting through the automated delivery of metric/dashboard reports
- Automating applicant status notifications and job interest cards
- Easy-to-use, intuitive user interface
- Creates staff efficiencies

For more information contact

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Human Resource Information System (HRIS) Project

What is the HRIS Project?

The Human Resource Information System (HRIS) Project was started by the Department of Administrative Services (DAS) to plan for the replacement of existing human resource (HR) applications: the Position Personnel Database (PPDB), the Position Information Control System (PICS), and the Applicant Certification System (APPL/CERT).

The Governor's Recommended Budget did not include a request to continue the HRIS project for the 2009-11 biennium. The HRIS project accomplishments are shared below and will be assessed and evaluated in the 2009-11 biennium to provide process improvements where beneficial.

Accomplishments of the HRIS Project

For the 2007-09 biennium, the HRIS Project team accomplished the following:

- Created a Personnel Action Code Selection Guide to facilitate accurate, consistent data entry;
- Worked with agencies to develop and document HR As-Is business process models;
- Developed HR Could-Be business process models for use with a Commercial Off The Shelf (COTS) based HRIS system;
- Developed business and technical requirements;
- Conducted critical business interviews (CBI) with key project stakeholders;
- Identified shadow systems being used to support unique HR data needs;
- Developed a business case with cost benefit analysis;
- Prepared an executive summary of the HRIS business case.

One of the tasks of the HRIS project team was to capture and document the high level As-Is Human Resource business processes partnering with a cross section of agencies and the Human Resources Services Division (HRSD). These business process models were then reviewed by HRSD and state agency HR personnel through numerous workshops.

The business process workshops provided participating agencies the opportunity to give their input along with sharing how HR processes may differ in each agency. The final high level HR process models will serve as a baseline in understanding how current HR processes begin and end.

Once the HR As-Is processes were identified, HR Could-Be process models and narratives were developed to highlight how current HR process could be implemented in a HRIS COTS based system. A comprehensive set of HRIS business and technical requirements were also identified.

An initial step in the early planning process was to conduct a number of interviews with key project stakeholders. The goal of these interviews was to obtain initial feedback from a wide range of stakeholders on issues with the current HR systems, identify opportunities for improvement, potential benefits and risks associated with implementing a new HRIS. In addition to PPDB, APPL/CERT, and PICS, there are a number of DAS and agency-level systems and interfaces (shadow systems) that supplement human resource and other functionality. These shadow systems are individual agency applications, spreadsheets, or processes that have been developed to fill a gap in a data, reporting, or regulatory requirements.

Using much of the information noted above, a comprehensive business case including cost benefit analysis was developed to support the development and implementation of the Human Resource Information System. An executive summary highlights the information provided in the business case.

Accomplishments for the HRIS project can be accessed above and through the Information Links section to the right.

For questions or additional information, contact:

Steve Schafer, Project Manager, Steven.J.Schafer@state.or.us
Jeanette Miley, HRIS Business Analyst, Jeanette.Miley@state.or.us
Sharon Beck, HRIS Technical Analyst, Sharon.Beck@state.or.us
Sheri Nees, Recruitment Business Analyst, Sheri.Nees@state.or.us

Web address: <http://www.oregon.gov/DAS/HR/hris.shtml>

Information

Links

[HR As-Is Business](#)

[Process Models](#)

[HRIS Business](#)

[Requirements](#)

[HRIS Technical](#)

[Requirements](#)

DAS HRIS Project

As-Is Business Process Models

Overview

One of the tasks of the HRIS project team was to capture and document the high level As-Is Human Resource business processes partnering with a cross section of agencies and the Human Resources Services Division (HRSD). These business process models were then reviewed by HRSD and state agency HR personnel through numerous workshops.

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Legend

Process Model Legend (pdf)

Position Control

HR1.10E-A	Position Budgeting for New Biennium	pdf	visio
HR1.20E-A	Legislative Approved Position	pdf	visio
HR1.30E-A	Position Funding	pdf	visio
HR1.50E-A	Temporary Positions	pdf	visio

Recruiting and Staffing

HR2.10E-A	Recruiting	pdf	visio
HR2.20E-A	Interview	pdf	visio
HR2.30E-A	New Employee	pdf	visio

Workforce Management

HR3.11E-A	Job Changes	pdf	visio
HR3.22E-A	Pay Changes	pdf	visio
HR3.30E-A	Separations	pdf	visio
HR3.40E-A	Employee Status on Leaves	pdf	visio
HR5.10E-A	Performance Evaluations	pdf	visio
HR5.60E-A	Grievance Tracking	pdf	visio

Position Mgmt & Classification

HR1.40E-A	Position Classification (Partner with Agencies)	pdf	visio
HR3.24E-A	Classification Study	pdf	visio

Labor Relations

HR5.50E-A	Disciplinary Actions	pdf	visio
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Human Resource Services Div.

HRSD01.01-A	PPDB and APPL/CERT Security Access	pdf	visio
HRSD01.02-A	Enterprise Reporting	pdf	visio
HRSD01.05-A	Mass Changes	pdf	visio
HRSD02.01-A	Resolve Retirement Data Issues	pdf	visio
HRSD03.03-A	Compensation Plans	pdf	visio
HRSD04.05-A	Grievance Appeals	pdf	visio
HRSD06.05-A	Temporary Extensions	pdf	visio

Web address: <http://www.oregon.gov/DAS/HR/hris.shtml>

DAS HR Systems and Services

PA Code Selection Guide

Overview

Listed below are general categories of the types of data that are recorded for employees. To the right of each category is a tool in either pdf or visio format that will help you select the appropriate personnel action code to enter into the Personnel and Position Data Base (PPDB) to accurately reflect employee activity.

PA Code Selection Guides

PA01.01	Appointments	PA Codes 1xx	pdf	visio
PA02.01	Employee Data Changes	PA Codes 2xx, 410, 420, 450, 460	pdf	visio
PA03.01	Job Changes	PA Codes 321 – 344	pdf	visio
PA03.02	Reclassifications and Reallocations	PA Codes 361 – 383	pdf	visio
PA04.01	Pay Differentials	PA Codes 430 – 441	pdf	visio
PA05.01	Termination	PA Codes 5xx	pdf	visio
PA06.01	Leaves and Suspensions	PA Codes 6xx and 7xx	pdf	visio
PA07.01	(Intentionally left blank)			
PA08.01	Pay Changes	PA Codes 8xx	pdf	visio
PA09.01	Special PA Codes	PA Codes BIC, COR, EFF, PAC, PRG, OUR	Coming Soon	
PA10.01	Position (PB5D) Codes	PA Codes 010 – 090	pdf	visio

Web address: <http://www.oregon.gov/DAS/HR/HRSS.shtml>

PICS ROLL INFORMATION - WHAT WE DO HERE IN HR SYSTEMS

Revised 6/29/09

1. We get email from Denver (SABRS) saying PICS rolled
2. Then we put information on the Welcome Window
 - PBTG 9,40

Watch PBNG for important updates on PICS rolls

PICS will roll tonight for the following agencies _____

3. Then the next morning remove the part about PICS agency rolling from the Welcome Window.
4. The next day when we know that the PICS roll went ok (sometimes they fail) then put the information on the PBNG screen.

Pics roll updates for pb5d / check pbea action needed after the roll. Action needed "pbea" will show positions that need to be established and positions that are abolished. Questions? Email group.ppdb@state.or.us

5. I created a document to log the PICS rolls in the PICS folder under KimPPDB. So as we add information onto PBNG we can add the dates and agencies that rolled to this sheet. The PBNG will only hold so much at a time, I do try to keep a lot of the information on at a time before I purge the stuff off that screen. I also keep a file in my file cabinet, PICS rolls 2009-2011 for miscellaneous documentation. Donna and others have wanted to know that information on who rolled when.
6. After the agencies start working with their Action Needed screens a few things may happen that we may have to take care of with Master Operator codes.
 - **BIC CODE CAUSES PB5D 'EMP CNT' TO BE WRONG:** One thing that happens might be that when they use the BIC pa code it sometimes makes the Employee count on the PB5D screen add a count to it. If that happens we first have to check PBEP to make sure the count is really not correct and then will use the OUR PA code and correct the employee count. A PPDB job will run daily to catch and fix that problem during the PICS rolls *and possibly weekly after that.*
 - **PBEA ACTION NEEDED DOESN'T CLEAR OFF AFTER COMPLETED:** Another thing that happens is the PBEA screen sometimes won't clear itself off after they do remove the action needed code "Y". So what I do during the next many months is I take a look at the agencies PBEA screens and bring some up and find those and remove them with the 'P'. Be careful that code is powerful and you have to make sure you have the right record before you do the 'P' or you will remove the real action needed. I will show you how I do that also.
 - **PICS STUBS:** Also another thing we do after all PICS rolls have happened. Also we run a program after PICS rolls and before PICS freezes to delete any outstanding PICS stubs that maybe didn't get executed and would be just sitting out there. PICS Stubs look very different from a P10, there will be a PB5D record and yet no P10 on the record and very minimal information. (see process for PICS STUBS process in the PICS_rolls folder under KimPPDB.

DEPARTMENT OF ADMINISTRATIVE SERVICES
BUDGET AND MANAGEMENT DIVISION
STATEWIDE AUDIT AND BUDGET REPORTING SECTION (SABRS)

END OF BIENNIUM/ BEGINNING OF BIENNIUM TIMELINES AND INFORMATION

Reallocation/ Finance Packages

- To use 2007-09 Finance Plan balances, agencies must submit reallocation package requests to SABRS *no later than 5:00 pm on Friday, June 26, 2009.*
- Remaining 2007-09 balances are "lost" after June 30, 2009; they do not carry forward to the 2009-11 biennium.
- Plans received after 5:00 p.m. on June 26, 2009 are considered 2009-11 plans and must start with a zero balance.

PICS

- Budget Execution (BX) File (also referred to as the "LA" file)
 - Certain changes keyed to this file by SABRS will update the PB5D screen. The file currently contains 2007-09 position data.
 - After June 30, 2009, the file will continue to exist until the "new 2009-11 BX file" is created. PB5D will continue to look to this file until then, but SABRS will stop updating the file after June 30.
- Budget Preparation (BP) File
 - Currently contains 2009-11 position data.
 - After the PICS roll, these records become the new 2009-11 execution file.

Approaching New Biennium -- Sequence of Events:

1. 2009 Legislative Session Ends; 2009-11 budgets are approved and finalized.
2. SABRS conducts agency budget staff training and "opens" PICS BP file for the agencies.
3. Agency budget folks make adjustments in the PICS BP and ORBITS files to reflect Legislative directives.
4. SABRS keys pending 2007-09 re-allocation packages into the agency's 2009-11 PICS BP file.
5. SABRS performs PICS audit.
6. SABRS performs ORBITS audit.
7. Once both PICS and ORBITS audits are completed, the PICS Roll takes place.

¹ For distribution to agencies at P.I.E. meeting June 09

PICS Roll

- What is the ROLL?
 - Once an agency has passed both PICS and ORBITS audits, SABRS runs a computer program in the evening called the PICS Roll.
 - This process basically overwrites the existing Budget Execution file (BX file), which is currently the 2007-09 BX file, with the new 2009-11 position actions (new establishments, re-classes, PP to PF, etc.), thus creating the new 2009-11 BX file.
- Agencies need to be careful with position actions, because some positions which were requested as permanent could have been changed during your hearings to limited duration.
- Each evening, an e-mail is sent to DAS HRSD PPDB Group, the SABRS staff, and BAM Analysts notifying them who will be rolled that evening.
- HRSD puts a message out on the PBNG News Screen regarding which agencies have rolled that evening.
- The following morning, after SABRS has verified that the Roll was performed:
 - SABRS will contact the agency SABR Coordinator informing them that the roll was completed.
 - In addition, the SABR Coordinator will be asked to inform their Personnel staff that the Roll is completed.

Post Roll

- After an agency has rolled, SABRS will process all approved reallocation packages that were not previously keyed to the 2007-09 BX file and will key them to the current "new" 2009-11 BX file.
- If an agency is unsure which packages/ positions were keyed prior to the roll – they need to refer to their last month end reports (the last date for these will be as of June 30, 2009). All actions reflected on this report would also have been keyed to the budget prep file. These can be obtained from the website sited below- see Month-End Reports
- If a position is not on that report, it may have been in a package in process as of 6/30. This package will be keyed post-Roll, depending on 'if and when' the package is approved.

Month-End Reports

- SABRS distributes a statewide e-mail reminding agencies to print off their last June 30 month-end budget execution reports from the website sited below:
<https://columbia.das.state.or.us:3045/cics/pw55/ppdpw055>
- SABRS reminds agencies to keep their June 2009 month-end budget execution reports to complete the budget preparation process for the 2011-13 biennium.
- SABRS will produce budget support documents for agencies when they have completed all budget-related audit processes and PICS data has been "rolled."

¹ For distribution to agencies at P.I.E. meeting June 09

PPDB PROCESS AFTER THE PICS BUDGET ROLLS

1. When the Statewide Audit and Budget Reporting Section (SABRS) is going to process a PICS Roll for an agency, they email HR Systems the evening that it will roll.
2. HR Systems will update the PPDB Welcome Message that shows on the screen when you type in any transaction code, such as PBED. The message will give information that certain agency numbers will be rolling that night.
3. The next day HR Systems posts the agency on the PBNG screen to show the agencies that did have a PICS Roll.
4. After PICS rolls for an agency, the system automatically populates the position screen (PB5D) with the position updates. This would include but not limited to the P10 (PICS Position Establishment) and the P90 (PICS Position Abolishment)
5. Also at this time, the system will populate the Action Needed screen (PBEA) with new establishments and employees who are on abolished positions.
6. The action needed information will also be included on the next Monthly Audit report.
7. HR Systems sends out Position Change (PC) Reports within a few days that are generated by this PICS roll process
8. Agencies should watch their action needed screen (PBEA) to determine what actions need to be processed.
9. To check your action needed screen, do the following and ENTER:

```
CANCEL: . NEXT ACT PBEA AGENCY: 10700 EMP: ..... JOBNO: .. POSNO: .....  
AUTHNO: ..... EFF DTE: 000000 OTHER: .....  
MSG AREA: KEY "PBNG" FOR PPDB NEWSLETTER AND LATEST BULLETINS
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Action needed screen will show all the items that you need to take care of such as establishing a new position or moving people off abolished positions. ACTION NEEDED EXAMPLES - See **Attachment A**

- **POSITION ESTABLISHMENT NEEDS COMPLETION** - see **Attachment B** for instructions on how to complete an establishment.
- **EMPLOYEE MUST BE MOVED FROM ABOLISHED POSITION** – see **Attachment C** for instructions on how to use the BIC PA code if necessary. The employee needs to be terminated or moved to a new position number. BIC pa code instructions will also discuss what to do if there are doublefill situations to take care of.
- Note: You could also receive Position Change (PC) reports with other actions such as P21, P24, P40 etc. These could be items to show of position reclasses or some type of change to the position that you may need to make changes to the employee. P40 actions may be generated if the number of months for the position changed or the position type changed. You can discuss with your budget analyst if you are unsure of what the changes are on your PC report. These type of actions may not show on the Action Needed screen but only the PC reports.

If you have any questions on this process, email group.ppdb@state.or.us

ATTACHMENT A

PPDB ACTION NEEDED - SCREEN EXAMPLES

To determine if you have any action needed, type PBEA in "NXT Act" field and YOUR AGENCY # in "Agency" field. This screen will tell you what actions are needed due to the PICS rolling for your agency and also other actions you may need to take care of.

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PBGW                                DEPT OF ADMIN SVCS

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                                PLEASE ENTER YOUR REQUEST
                                REFERENCE YOUR COMPUTER SYSTEMS USER MANUALS FOR ASSISTANCE

CANCEL: .  NXT ACT: PBEA  AGENCY: 09010  EMP: .....  JOBNO: ..  POSNO: .....
AUTHNO: .....  EFF DTE: 000000  OTHER: .....
MSG AREA: KEY "PBNG" FOR PPDB NEWSLETTER AND LATEST BULLETINS
    
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PBEA                                DEPT OF ADMIN SVCS
                                ACTION NEEDED LOCATOR

AGENCY 09010    PPDB TEST AGENCY 10

AUTHNO      POSNO      EMP      JOB      EFF DTE      NAME      POS      EMP
? 000793490  0900120          070109          SMITH, HIRED          Y
POSITION ESTABLISHMENT NEEDS COMPLETION
? 000793500  0900121          070109          SALEM, NEWBY          Y
POSITION ESTABLISHMENT NEEDS COMPLETION
? 000793510  0900122          070109          TESTING, KIMMY          Y
POSITION ESTABLISHMENT NEEDS COMPLETION
? 000810740  9000001          040110 (this is phase in)          Y
POSITION ESTABLISHMENT NEEDS COMPLETION
? 001004440  0907703  OR0000001  02  063009  SMITH, HIRED          Y
EMPLOYEE MUST BE MOVED FROM ABOLISHED POSITION
? 001004440  0276503  OR0000002  02  063009  SALEM, NEWBY          Y
EMPLOYEE MUST BE MOVED FROM ABOLISHED POSITION
? 001004440  0333803  OR0000003  02  063009  TESTING, KIMMY          Y
EMPLOYEE MUST BE MOVED FROM ABOLISHED POSITION

ACTION: ...  NXT PA C/N: .....  CONFIRM: .  /\  *LAST*
CANCEL: .  NXT ACT: .....  AGENCY: .....  EMP: .....  JOBNO: ..  POSNO: .....
AUTHNO: .....  EFF DTE: 000000  OTHER: .....
MSG AREA:
    
```

HOW TO ESTABLISH A POSITION IN PB5D POSITION SCREEN

ATTACHMENT B

010 Position Establishment

PURPOSE: Position Change Action (PC) code 010 is used to complete an establishment as a result of Legislative Action, E-Board Actions or Reallocation actions.

Data Fields:

- * Indicates that the field is computer assigned however the value may be changed.
- ** Indicates that the field is computer assigned however the value can be changed by a Master Operator.
- *** Indicates that the field is left blank or optional however it may also be required if other fields are populated or hold specific values.

Screen	Field	Requirement	Format/Value
Position Display	Posno (Position Number)	Computer Assigned	nnnnnnn
	RDC (Report Distribution Code)	Required	Alpha/numerical
	Job Share	Optional	J = Job share (must designate PB5D in order to make employee job share)
	Work Title	Required	Working title from position description
	Fz Agy	Optional	Agency Use only, see help screen (F5)
	FLSA	Required	E, N see help screen (F5)
	Overtime	Required	Y,N see help screen (F5)
	County/City	Required	County City Code, see help screen (F5)
	Mass Transit Code	Required	C, E, H, K, L, M, R, S, T, X, Y see help screen (F5)
	Holiday Code	Required	A, B, D, E, G, H, N, O, Z see help screen (F5)
	Timesheet Code	Required	N, 1, 2, 3,4, 5, 6 see help screen (F5)
	Pay Distribution	Optional	Paycheck distribution number
	Payroll Agency	Computer Assigned*	
	Labor Cost and Percent (1-4)	Required	Total must equal 100%
Agency Use	Optional	31 characters available	

ATTACHMENT B

HOW TO ESTABLISH A POSITION IN PB5D POSITION SCREEN - Continued

Once PICS has rolled for your agency, the PICS roll will create a P10 position change code on the PB5D record. The PB5D screen will then send an action needed to the PBEA action needed screen for your agency. At that point you may complete the establishment for the new position. Employees can not be hired onto a position that has not been established yet.

PROCESS ESTABLISHMENT:

1. Bring up the position number to establish on the PB5D screen by doing the following:

Bring up the Action Needed screen (PBEA) and you can open the record you want by placing your cursor on the and <ENTER>. This will open up the PB5D screen so you can process the establishment. Or you can do the following to bring up the position number desired:

CANCEL: . . NXT ACT: PB5D AGENCY: 09000 EMP: JOBNO: . . POSNO: 1000000
AUTHNO: EFF DTE: 000000 OTHER:

2. Use PC code '010' in the NXT PA C/N field 'effective date' in EFF DTE field. See screen example below.
3. The screen will show update mode (PB5U) in upper left corner.
4. Complete all fields as needed. Underlined fields below are optional. Refer to required fields shown in chart above.
5. Note the EST DTE: for proper effective date for establishment. This is important to note as some positions may be phase in establishments and have a future establishment date. The system will not allow you to establish a position in a future month. You would have to wait until that month becomes the current month to process the establishment.
6. After keying valid data into fields needed, type 'CHG' in the Action Field and 'Enter'. The changes are not saved unless you see this message: **POSITION DATA BASE UPDATED**'.

ATTACHMENT B

HOW TO ESTABLISH A POSITION IN PB5D POSITION SCREEN – Continued

```

PB5D                DEPT OF ADMIN SVCS
CURRENT             POSITION DISPLAY          F6=PBEA
AGENCY: 09000      AGY DISTR: 09000      AUTHNO: 000804510  ACT NEEDED: Y
P5 CLASS-COMP: MMN X0103 AA MGT SVC NSV OFFICE SPECIALIST 1  RNG: 12  FZP5: N
NEW EFF D/T: ..... END DTE:              RETRO:      EST DTE: 070109
NEW PA CDE: ..... NUM .....             EMP CNT 000

CLASS COMP: MMN X0103 A A                RNG: 12                POS TYP: PF
POSNO: 0900202 [RDC]                     JOB SHR:              FZP5: N
WRK TITLE [ ]                             FZ AGY:
BENCHMARK: [FLSA] : [OVERTIME] :
CO/CITY : [MASS TRANSIT] : [HOLIDAY] : [TIMESHEET] :
APPT AGY: 09000      PAY DISTR:          PR AGENCY: 09000
LABOR COST/PCT: 1) [ ]                2)
                3)                    4)

AGY USE:
NAME: NO INCUMBENT      CLASS-COMP:          RNG:          FZE:
CO/CITY:      MASS TRANSIT:      HOLIDAY:      TIMESHEET:          RDC:      DBL:
LABOR COST/PCT: 1)                2)                    FLSA:      OT:
                3)                4)                    PAY DISTR:
EFF D/T: 070109 0000 PA:CDE [PIG]          NUM ESTAB
ACTION: ... NXT PA C/N: 010..... CONFIRM: . PAGE: 001 OF 001
CANCEL: . NXT ACT: ..... AGENCY: ..... EMP: ..... JOBNO: .. POSNO: .....
AUTHNO: ..... EFF DTE: 070109 OTHER: .....
MSG AREA: POSITION ESTABLISHMENT NEEDS COMPLETION
    
```

ATTACHMENT C

BIC - Budget Issue Correction Personnel Action Code

PURPOSE: This Personnel Action Code is used to process an action changing an employee's record to show the employee in the correct authorization/position number as a result of Legislative Action, E-Board Actions or Reallocation Actions.

- BIC PA Code can be used on an employee history record or a current record. If BIC is processed on a history record, the system will place the record in the correct date order within the file. The position number will retro position related information to the current record or within the job number.
- BIC PA Code does not create a new job number (JOBNO) and does not terminate securities relating to the RACF USER ID. Code only used on PBED screen (not PB5D).
- BIC PA Code is an 8am effective PA code so reminder that if a position is abolished on 6/30/xx then the BIC would need to be effective on 7/1/xx.
- **Other Fields:** The BIC PA code opens up the doublefill code, the location code, the agency use line and the repr reason fields for changes. If you need to change other items, you will need to use the PA code 237 or other appropriate codes for the changes you want.
- **Doublefills:** Agencies may choose to doublefill positions while waiting for new authorized positions for the new biennium. After PICS has rolled and the new valid position is established, then the BIC PA code can be used to move the employee onto the correct number and remove the doublefill situation and at that time the doublefill code or repr reason code may be updated.

Step 1 – Bring up employee and enter BIC PA Code and Effective Date as shown below.

```

PBEU                DEPT OF ADMIN SVCS
CURRENT             EMPLOYEE PAY UPDATE
NAME: DOE, JOHN    EMP: OR0000000 JOBNO: 02 DBL:   ACT NEEDED:
AGENCY: 09000 AGY DISTR: 09000 AUTHNO: 000721220 POSNO: 0900001 RDC: 000
EMP CLASS-COMP: OA C0103 AA OPEU STRKE OFFICE SPECIALIST 1 RNG: 12 FZE:
NEW EFF D/T: 070109 .... EFF DTE: 070109 END:          RETRO:      PA PRNT: .
NEW PA: CDE ..... NUM .....          CREATED: 101600      SH DISP: .

CLASS COMP: OA C0103 A A RNG: 12 WORK: CLASS COMP          RNG
BASE: 1500.00 BASIS: S PAY: 1500.00 OFF STEP:
SED: 070110 REPR REASON: FZE: AT MAX: STEP: 03
FULL/PART CDE: F F/P PCT: 1.0000 PERS CDE: WAGE/JOB CLASS:
BENEFIT: LEAVE ACCR: FLSA: N OVERTIME: Y
WORK SCHED: 8.000 PAY DISTR: 99111 PR AGENCY: 09000 EEO: F
FIX DIF TYPE, FMLA & AMT: 1) 2) 3)
LABOR COSTS AND PERCENT: 1) 123456789999 1.0000 2)
                        3) 4)
P5 CLASS-COMP: OA C0103 AA OPEU STRKE OFFICE SPECIALIST 1 RNG: 12 FZP5:
POS TYPE: PF CO/CITY: 24M MASS TRNST: S HOLIDAY: O TIMESHEET: 2 CONCUR JOB: 1
EFF D/T: 070109 0000 PA:CDE 330 NUM
ACTION: ... NXT PA C/N: BIC, ..... CONFIRM: . PAGE: 001 OF 003
CANCEL: . NXT ACT: .... AGENCY: ..... EMP: ..... JOBNO: .. POSNO: .....
AUTHNO: ..... EFF DTE: 070109 OTHER: .....
MSG AREA:
    
```

Step 2 – System will ask for position number, fill in 7 digit position number <ENTER>

```

PBEU                DEPT OF ADMIN SVCS
                    EMPLOYEE JOB UPDATE

AUTHNO: P=0900200

ACTION: ... NXT PA C/N: BIC, ..... CONFIRM: N PAGE: 001 OF 001
CANCEL: . NXT ACT: PBEU AGENCY: 09000 EMP: OR00000000 JOBNO: POSNO:
AUTHNO: EFF DTE: 070109 OTHER:
MSG AREA: E0221-AUTHNO OR POSNO NEEDED TO DETERMINE NEW POSITION
    
```

Step 3 – System will then take you to Employee Job Display, put the cursor on 'ACTION' and type in 'CHG' and <enter>. You will then see "Employee Database Updated".

Position Personnel Database
Web Reports Matrix
As of 6/30/2009

<u>Web Report Title</u>	<u>Description</u>	<u>Frequency</u>
Comp Plan Download	Compensation related information specific to representation and classification of positions in the agency.	Monthly
Audit Detail Report	Monthly Audit Report for Agency. Shows Employees: Due Step Increase; Ending Trial Service; Due LAC Change; Salary Above Maximum; Salary Above 15k; Off Step; SED in Past; TS End Date in Past; With Freeze Code; Over Fill; Under Fill, Cross Fill; WOC; Lead Work; Differentials; On Leave; Position Repr Different; Action Needed; Future RSD; Temp Service Worker (XTSW); X Repr Due Separation; SEIU Temps; Visual Ethnicity Required; Differential Greater than 5%	Monthly
Audit Summary Report	Summary Count of the data reported in the Audit Detail Report broken down by the Audit Description. Provides an overview and quick reference to items in the Audit Detail Report	Monthly
EEO - Job Group	EEO Employee counts and percentages of ethnicity and gender for the agency sorted by EEO Job Group.	Quarterly
EEO - RDC	EEO Employee counts and percentages of ethnicity and gender for the agency sorted by report distribution code.	Quarterly
EEO - RDC, Job Group	EEO Employee counts and percentages of ethnicity and gender for the agency sorted by report distribution code and EEO job group..	Quarterly
FUT Records To Be Updated Next Month	Report of employee records with PA Code 'FUT' that need to be updated prior to payroll cut-off for the month that the FUT action is effective. The FUT PA code is used to enter appointments of employees where the effective start date is in the following future month. This report is used to minitor FUT transactions to make sure they are converted to the proper 1XX appointment PA code.	Monthly
LPOS - Action Needed List	Report showing Employee or Position Records where action may be needed. When the data in the current record is or may be invalid the record will be flagged and show on this report. This report shows notifications similar to those found on the PBEA screen in PPDB. The agency must correct the record in order for it to drop from the report.	Monthly

Position Personnel Database
Web Reports Matrix
As of 6/30/2009

LPOS - Detail Position List	Report of current filled positions by position class comp Shows detail of position information and the current occupant.	Monthly
LPOS - Summary of Position	Summary count of current occupied and vacant positions by report distribution code and class comp.	Monthly
LPOS - X Repr Employees	Current list Temporary Employees (X Repr) which includes general information about each appointment.	Monthly
MVACLIST Current Regular	Summary total count of positions versus vacant positions by class comp and duration of vacancy.	Monthly
MVACLIST Current Seasonal	Summary total count of seasonal positions versus vacant seasonal positions by class comp and duration of vacancy.	Monthly
MVACLIST Current Vacant Regular	Vacant positions by position class comp and position number. Duration of vacancy for each vacant position.	Monthly
MVACLIST Current Vacant Seasonal	Vacant seasonal positions by position class comp and position number. Duration of vacancy for each vacant seasonal position.	Monthly
PPDB - Security User Report	Lists active user ID's who have access to PPDB. Defines the level of access in PPDB. Some users may appear on the report who have access to PICS however the report does not not define the level of PICS access.	Monthly
State Audit Summary Report	Statewide summary count of the Audit Detail Report by audit description.	Monthly
State EEO - Job Group	Statewide EEO Employee counts and percentages of ethnicity and gender for the agency sorted by EEO Job Group.	Quarterly
State MVACLIST Current Regular Statewide	Statewide summary count of positions versus vacant positions and duration of vacancies by agency.	Monthly
State MVACLIST Current Seasonal Statewide	Statewide summary count of seasonal positions versus vacant seasonal positions and duration of vacancies by agency.	Monthly
Labor Cost Detail Changed Employees	Labor cost code changes in the employee record by employee and effective date. Shows old to new labor cost code.	Monthly
Labor Cost Detail Updated Position	Labor cost code changes in the position record by position number and effective date. Shows old to new labor cost code.	Monthly