Los Angeles County
Office of Education

HUMAN
RESOURCE
SYSTEM

DISTRICT PERSONNEL INFORMATION SERVICES

DIVISION OF SCHOOL FINANCIAL SERVICES

SESSION A

INTRODUCTION TO PERSONNEL

2023-2024 TRAINING MANUAL

An Official Publication

Los Angeles County
Office of Education

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Agenda

- **Welcome and Introductions**
  - Brief explanation of the keyboard
  - What is covered in this training session, goal
  - What is offered for special sessions
- **HRS Message Board**
- **Overview**
  - Relationship of Functions
  - Functions and Transactions
- **Introduction to the HRS Operations Manual**
- **Control Data Base (CDB) and Employee Data Base (EDB)**
  - Using the CDB Tables
  - Name Search

    **** BREAK ****

  - Adding a new classified employee
  - Job History

    **** LUNCH ****

  - Adding a new certificated employee
- **Evaluation and Close of Session**

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SECTION I.

FUNCTIONS AND FEATURES

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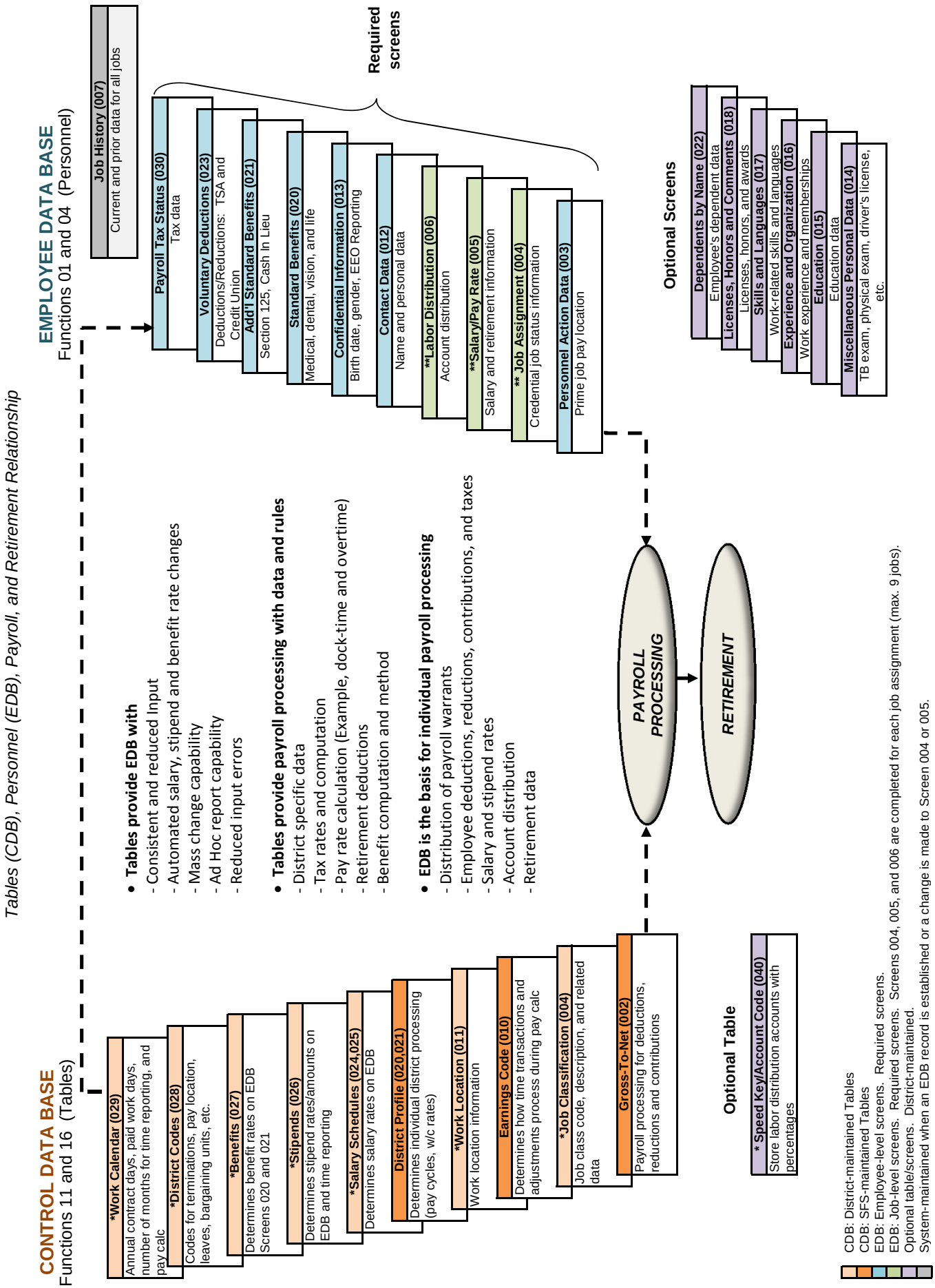
HRS SYSTEM OVERVIEW
Tables (CDB), Personnel (EDB), Payroll, and Retirement Relationship
CONTROL DATA BASE
Functions 11 and 16 (Tables)
*Work Calendar (029)
Annual contract days, paid work days, number of months for time reporting, and pay calc
*District Codes (028)
Codes for terminations, pay location, leaves, bargaining units, etc.
*Benefits (027)
Determines benefit rates on EDB Screens 020 and 021
*Stipends (026)
Determines stipend rates/amounts on EDB and time reporting
*Salary Schedules (024,025)
Determines salary rates on EDB
District Profile (020,021)
Determines individual district processing (pay cycles, w/c rates)
*Work Location (011)
Work location information
Earnings Code (010)
Determines how time transactions and adjustments process during pay calc
*Job Classification (004)
Job class code, description, and related data
Gross-To-Net (002)
Payroll processing for deductions, reductions and contributions
Optional Table
* Speed Key/Account Code (040)
Store labor distribution accounts with percentages
• Tables provide EDB with
- Consistent and reduced Input
- Automated salary, stipend and benefit rate changes
- Mass change capability
- Ad Hoc report capability
- Reduced input errors
• Tables provide payroll processing with data and rules
- District specific data
- Tax rates and computation
- Pay rate calculation (Example, dock-time and overtime)
- Retirement deductions
- Benefit computation and method
• EDB is the basis for individual payroll processing
- Distribution of payroll warrants
- Employee deductions, reductions, contributions, and taxes
- Salary and stipend rates
- Account distribution
- Retirement data
PAYROLL PROCESSING
RETIREMENT
EMPLOYEE DATA BASE
Functions 01 and 04 (Personnel)
Job History (007)
Current and prior data for all jobs
Required screens
Payroll Tax Status (030)
Tax data
Voluntary Deductions (023)
Deductions/Reductions: TSA and Credit Union
Add'l Standard Benefits (021)
Section 125, Cash In Lieu
Standard Benefits (020)
Medical, dental, vision, and life
Confidential Information (013)
Birth date, gender, EEO Reporting
Contact Data (012)
Name and personal data
**Labor Distribution (006)
Account distribution
**Salary/Pay Rate (005)
Salary and retirement information
** Job Assignment (004)
Credential job status information
Personnel Action Data (003)
Prime job pay location
Optional Screens
Dependents by Name (022)
Employee's dependent data
Licenses, Honors and Comments (018)
Licenses, honors, and awards
Skills and Languages (017)
Work-related skills and languages
Experience and Organization (016)
Work experience and memberships
Education (015)
Education data
Miscellaneous Personal Data (014)
TB exam, physical exam, driver's license, etc.
CDB: District-maintained Tables
CDB: SFS-maintained Tables
EDB: Employee-level screens. Required screens.
EDB: Job-level screens. Required screens. Screens 004, 005, and 006 are completed for each job assignment (max. 9 jobs).
Optional table/screens. District-maintained.
System-maintained when an EDB record is established or a change is made to Screen 004 or 005.

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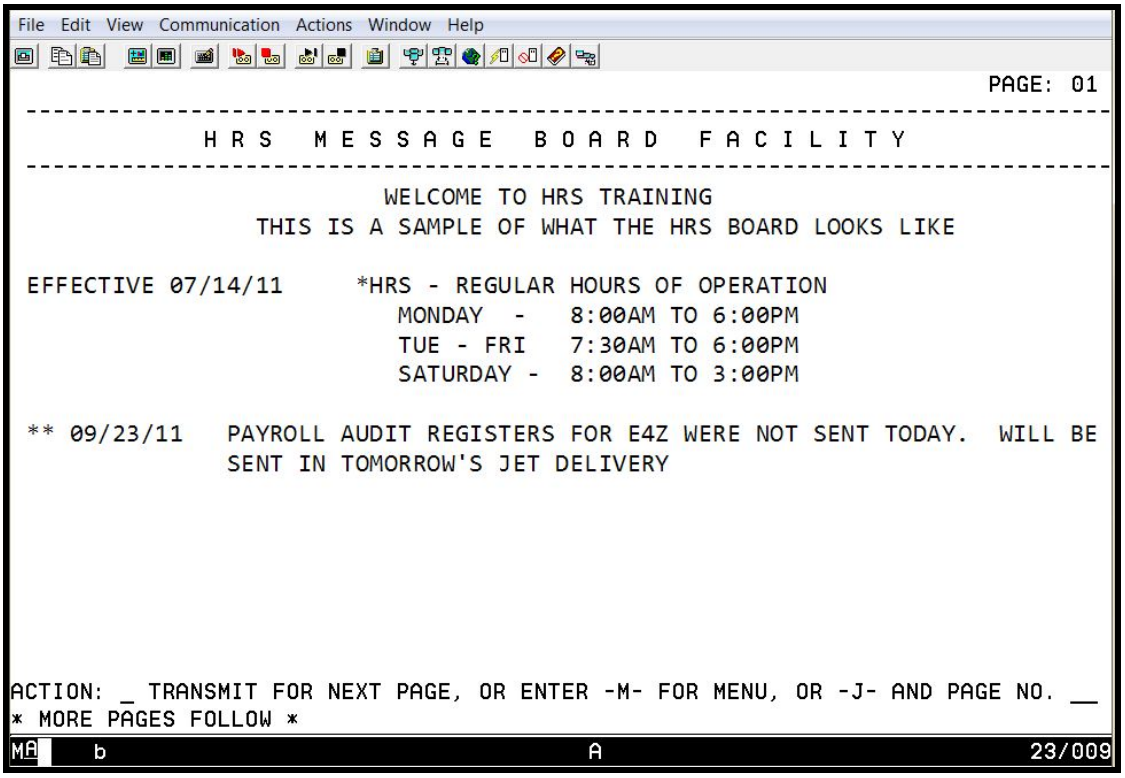
HRS Message Board

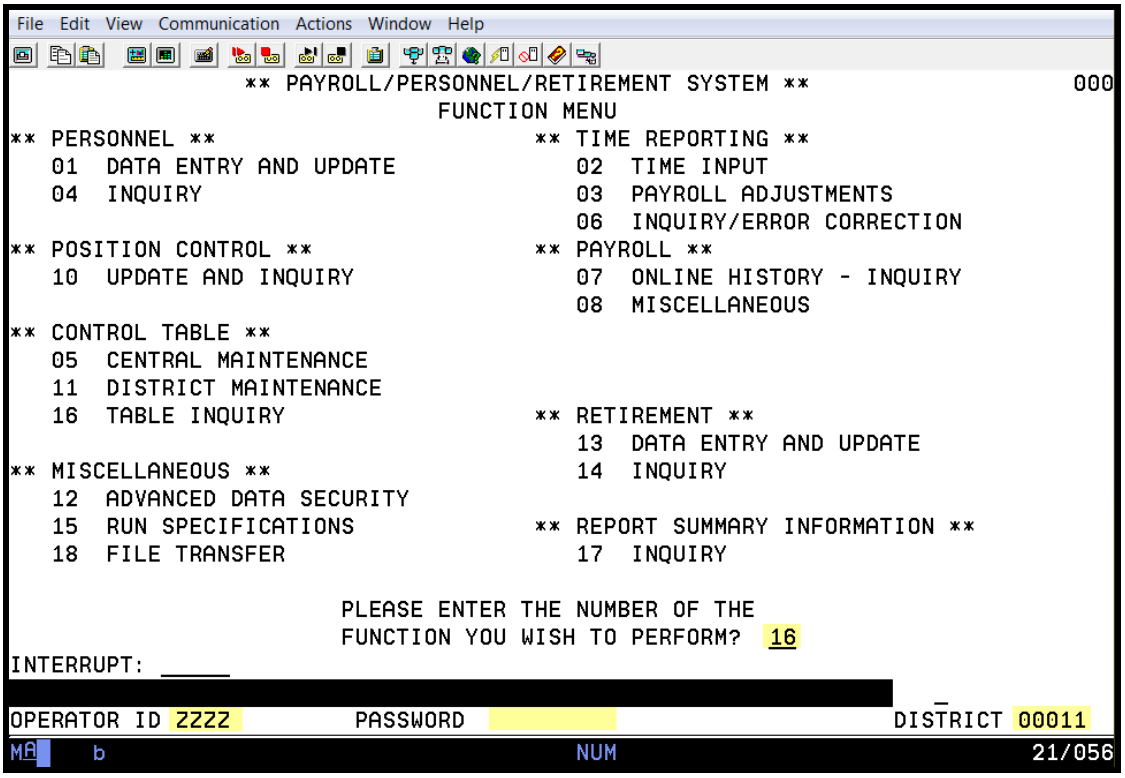


The HRS Message Board is LACOE's automated communication link with the Districts for HRS related information. It is important to check the Message Board periodically throughout the day. The Board is used to update districts instantaneously on system information such as unexpected down time and anticipated up time, changes in payroll scheduling, report distribution, reminders and other information that needs to go to districts expeditiously.

Follow the instructions at the bottom of Message Board to navigate within the Function Menu. To begin to use the system, navigate to the Function Menu by entering the following information.

1. In the **action field**, type action code **M** for menu.
2. Hit the **Enter key** on your keyboard.

Function Menu – HRS IBM Sign-On Instructions



The Function Menu is used to sign-on to the system and to select or change functions. A function consists of a group of related transactions/screens for a specific area of HRS, e.g., Function 16 Control Table Inquiry. Functions are two-digit numbers.

To select a function and sign-on to the system, enter the following information:

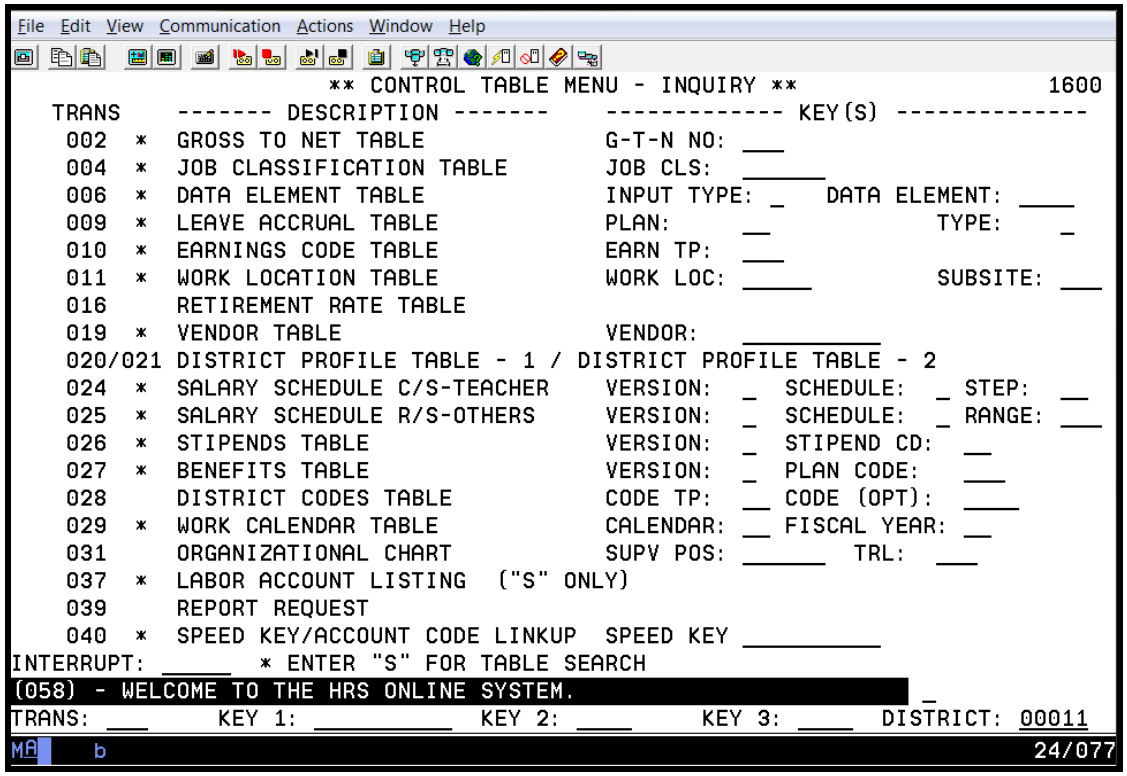
1. In the **Please Enter the Number of The Function You Wish to Perform? field**, type the **two-digit function number**.

Hit the tab key twice on your keyboard to skip the Interrupt field and the Action field or move your mouse and click on the Operator ID field.

2. In the **Operator ID field**, type the **unique identification code.**
3. In the **Password field**, type your **password**.
4. In the **District field**, type the **five-digit business unit number**.
5. Hit the **Enter key** on your keyboard.

The unique identification code is issued by the SFS HRS Security Unit. For inquiries, send them an email at SFSSecurity@lacoe.edu.

Transation Menu for Function 16



Function 16, Control Table Menu - Inquiry, is used to inquire or request copies of all district related tables. There are certain table access that is limited to SFS such as Data Element Table and Vendor Table.

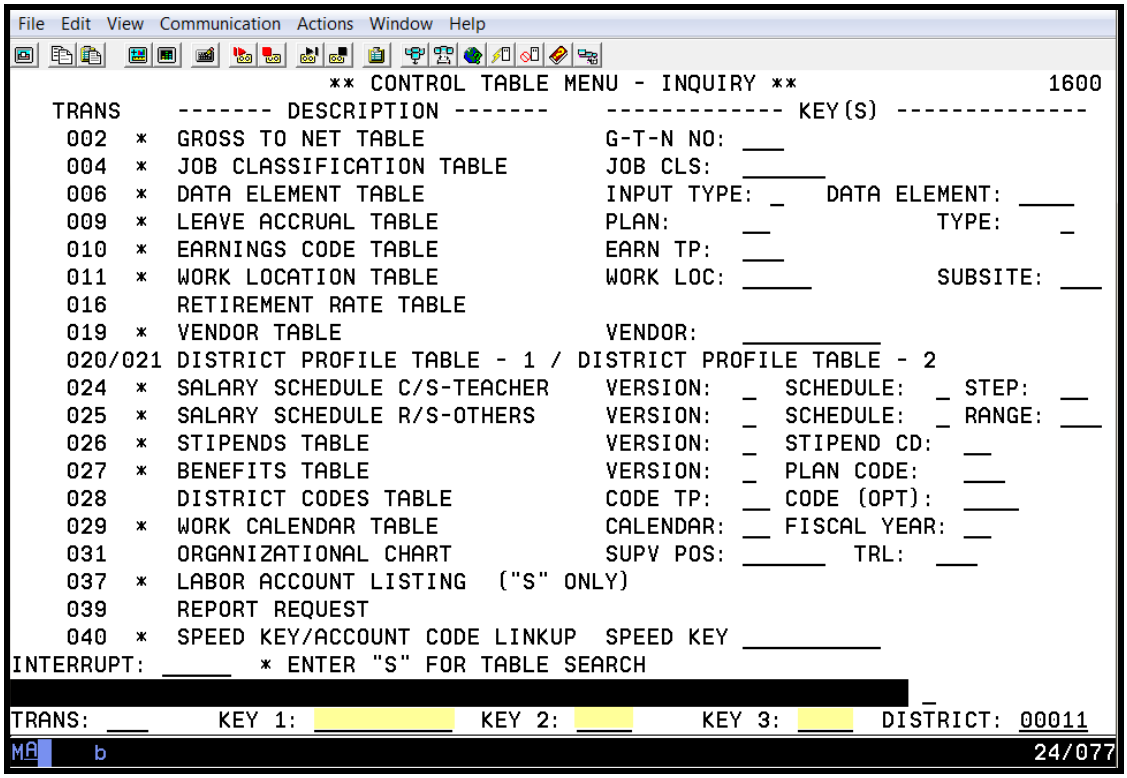
SFS Payroll Unit .....SFS_Payroll_Manager@lacoe.edu

- 002 Gross To Net Table
- 010 Earnings Code Table
- 027 Benefits Table

SFS Employee Services Unit .....SFSEmployeeServices@lacoe.edu

- 004 Job Classification Table
- 011 Work Location Table
- 020-021 District Profile Table - 1 and 2
- 024 Salary Schedule C/S Teacher
- 025 Salary Schedule R/S – Others
- 026 Stipends Table
- 028 District Codes Table
- 029 Work Calendar Table
- 040 Speed Key Table/Account Code Linkup

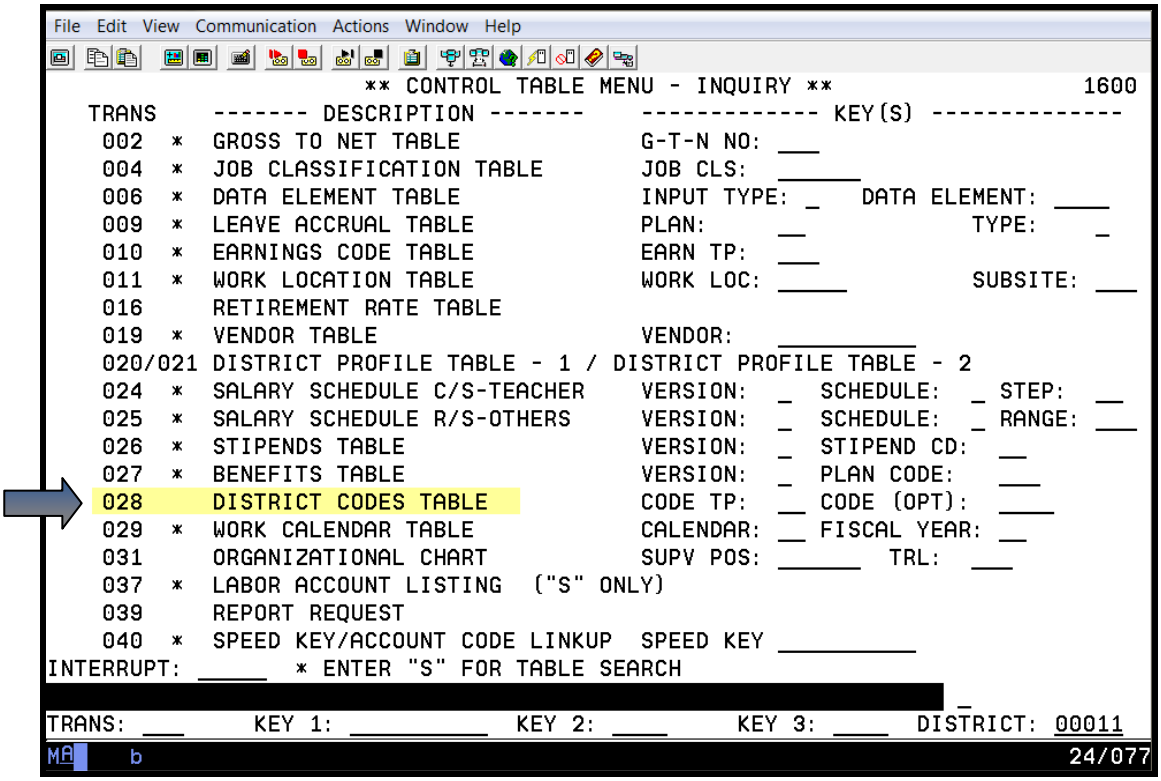
Key Field Functions



The key field functions are another way of accessing a table. They are located on the bottom transaction line and are labeled Key 1, Key 2, and Key 3. You may be required to use only one key field or all key fields depending on the table and the amount of detail being accessed. The chart below indicates which tables require input and in which key field.

Table Name	Key 1	Key 2	Key 3
002 Gross To Net Table	✔		
004 Job Classification Table	✔		
010 Earnings Code Table	✔		
011 Work Location Table	✔	✔ (optional)	
024 Salary Schedule C/S - Teacher	✔	✔	✔ (optional)
025 Salary Schedule R/S - Others	✔	✔	✔ (optional)
026 Stipends Table	✔	✔	
027 Benefit Table	✔	✔	
028 District Codes Table	✔	✔	
029 Work Calendar Table	✔	✔	
040 Speed Key Table	✔		

District Codes Table (028)



The District Codes Table stores six categories of codes and descriptions required for input on EDB screens for Bargaining Unit, Leave Reason, Pay Location, Evaluation Type, Permanency Indicator, and Termination Reason. The table has two optional sets of codes, District Code 1 and 2, which can be defined by the district and are used on the EDB Miscellaneous Personal Data Screen (014). It also has two sets of codes for Position Control. Each of the codes listed below is a separate table.

District Code	District Code Description
BU	Bargaining Unit
ET	Evaluation Type
LR	Leave Reason
PI	Permanency Indicator
PL	Pay Location
TR	Termination Reason
D1	District-defined code. This sub-table is optional.
D2	District-defined code. This sub-table is optional.
PC	Position Control - Used on PCDB Financial Information Screen (004) to record Benefit Package and Additional Contribution Package. See Position Control Manual for more information.
PN	Position Control – Records the last position number assigned and the last requisition number assigned for a fiscal year. See Position Control Manual for more information.

Processing On-Line Real-Time vs. Overnight Batch

On-Line Real-Time Processing

HRS allows users to add, change, and delete information using on-line real-time processing. This means the user can enter information on a screen and that information is immediately used by the computer to update the system. The user can immediately go back and see that the change has been posted to the system.

Overnight Batch Processing

The overnight batch process updates records and tables based on that day's activity and automated procedures. The batch computer programs process activity that cannot be processed at the time districts are entering data on-line.

Resources Available

There are resources available that can assist you with the Human Resource System (HRS). They can be found on our HRS Training website at https://www.lacoe.edu/hrs_training.

- **HRS Operations Manual** – This manual is referenced throughout this training manual and used in most of the training sessions. It is available for download in the General tab under the *Instructional Materials and Workbooks* section.

- **Training Manuals** – The training manuals that used in all of the HRS training sessions are available for download under the *Instructional Materials and Workbooks* section. Each manual is categorized by its topic, i.e. Payroll, Personnel, Retirement, and Position Control.

- **Workbooks** – The excel workbooks that used in some of the HRS training classes are available for download in the Workbooks tab under the *Instructional Materials and Workbooks* section. Some workbooks can be comprised of several spreadsheets.

- **Videos –** There are video tutorials to assist with basic HRS functionalities including navigation. They are located in the Videos tab under the *Instructional Materials and Workbooks* section.

Moving Within a Screen

Action Field Codes

B	=	BACK	-	Page back to a previous screen.
D	=	DELETE	-	Delete a table.
F	=	FORWARD	-	Page forward to the next screen.
G	=	GO	-	Store information on current screen and page forward to next screen.
J	=	JUMP	-	Jump to another transaction (no data is processed).
M	=	MENU	-	Page to Transaction Menu Screen.
N	=	NO	-	Do not enter the data into the system. Screen remains as is and allows user to make additional changes.
R	=	RESTART	-	Restore original data on the screen.
S	=	SEARCH	-	Search Transactions (functionality indicated by an "*" on the Menu).
T	=	TOP	-	Move the cursor to the top of the screen. If multiple screens, the cursor moves to the top first field of the first screen.
Y	=	YES	-	Confirm the transaction data and update the record.
*	=		-	Confirm deletion of a table.

Below are a few of the main keys you will use for moving around the screen.

Arrows	-	Moves the cursor in the direction the arrows are pointing. Arrow keys wrap from top-to-bottom, or side-to-side, of the screen.
Tab	-	Moves the cursor forward one field at a time.
Shift + Tab	-	Moves the cursor back one field at a time.
Home	-	Moves the cursor to the first character position on the screen where data may be entered.

Remove Data from EDB Screens and CDB Table Screens

- Required field - cannot change to space. It must have valid value.
- Optional field - alpha numeric - use the Delete key to clear the field one character at a time or use the End key to clear all characters in the field to the right of the cursor.
- Optional field - numeric (salary fields, dollar values, dates). Use "888" and completely fill the field to change the value to zero or space.

Exception: Future-Dated EDB Changes, Transactions 104, 105, and 106.

- If the field is alpha numeric, fill the field with asterisks.
- If the field is numeric or a date field, fill the field with "8"s (eights).

SECTION II.

TABLE SEARCH

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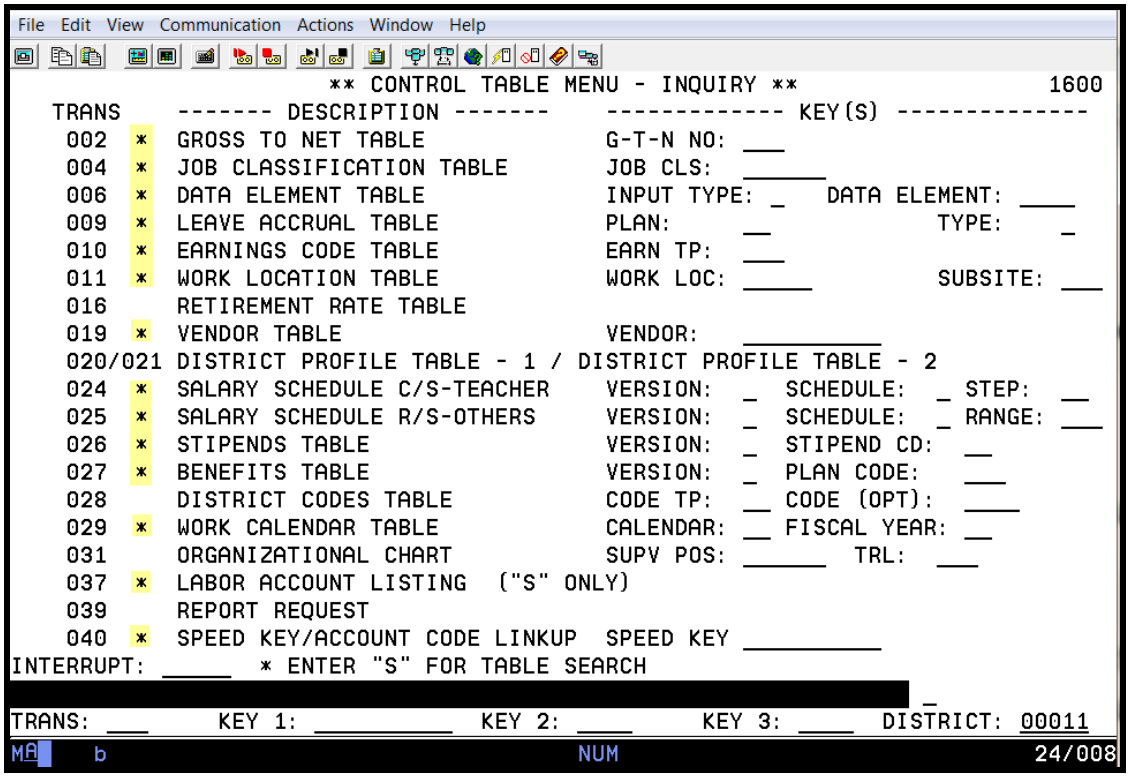
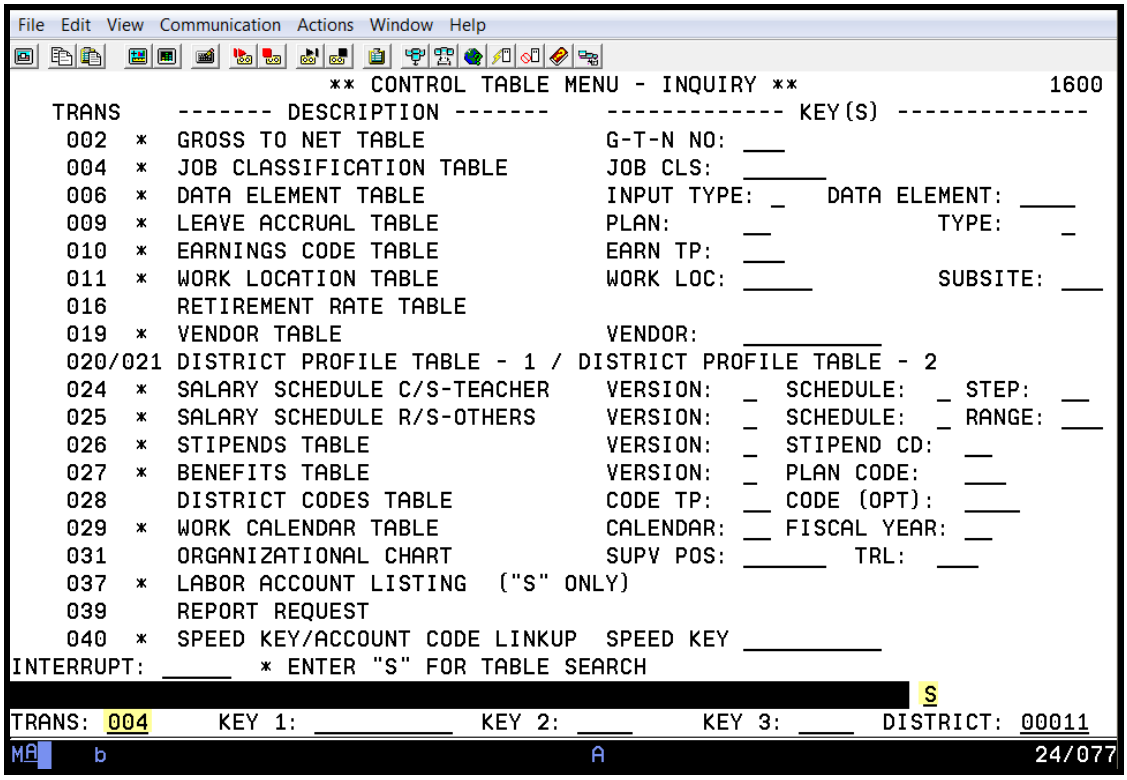
Tables with Search Screen Capabilities



Some tables have a search screen which allows you to view a list of records from the table rather than only one detail screen at a time. They are identified by asterisks.

Access the Table Search Screen

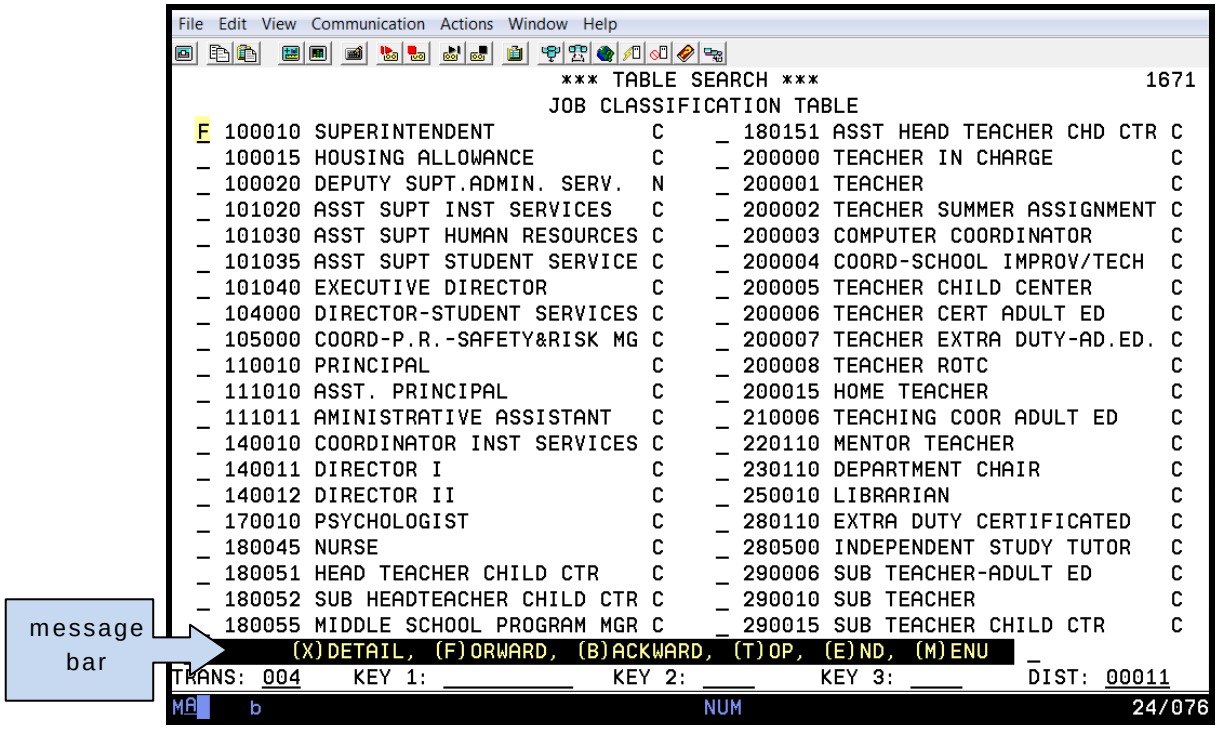


To access the Table Search Screen from the Transaction Menu,

1. In the **action field**, type action code **S** for search.
2. In the **TRANS field**, type the **transaction number**.
3. Hit the **Enter key** on your keyboard.

The system navigates you to the table search screen.

Navigate Within the Table Search Screen

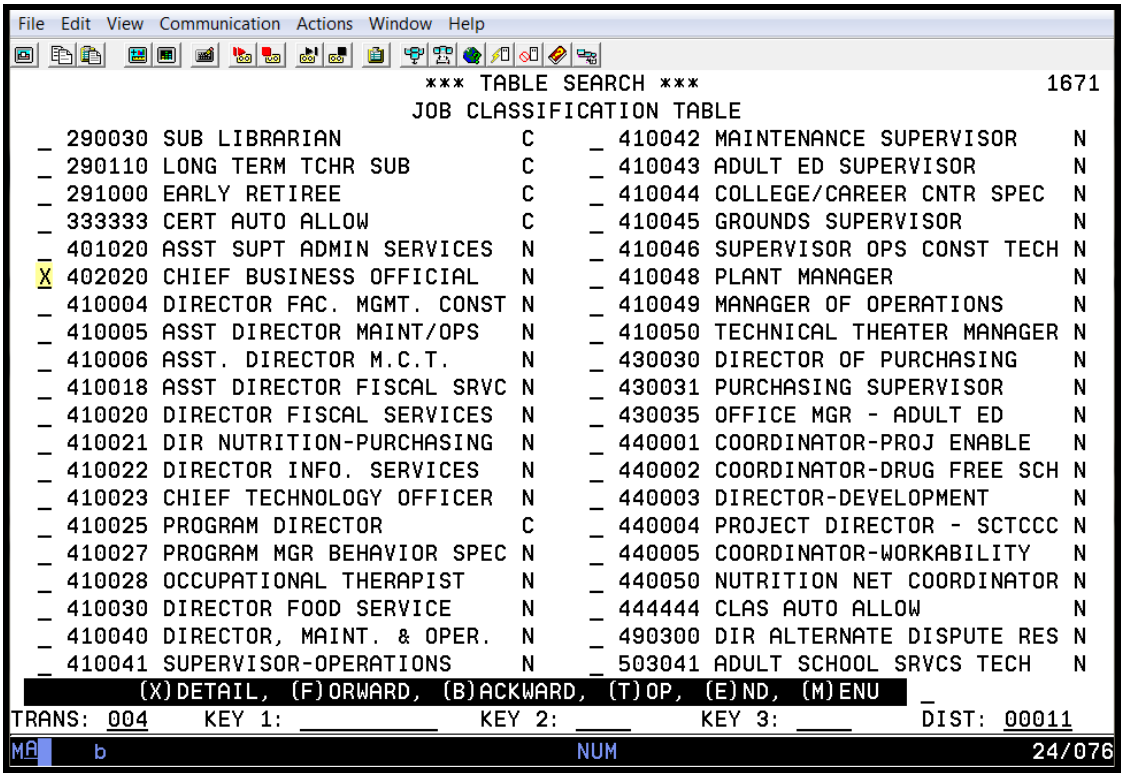


Once on the Table Search Screen, you can scroll to the next page by doing the following.

1. In the a**ction field or on the highlighted field shown above**, type action code **F** for forward.
2. Hit the **Enter key** on your keyboard.

Use the codes identified on the message bar to navigate, access the detail, or return to the transaction menu.

Access the Table Detail Screen

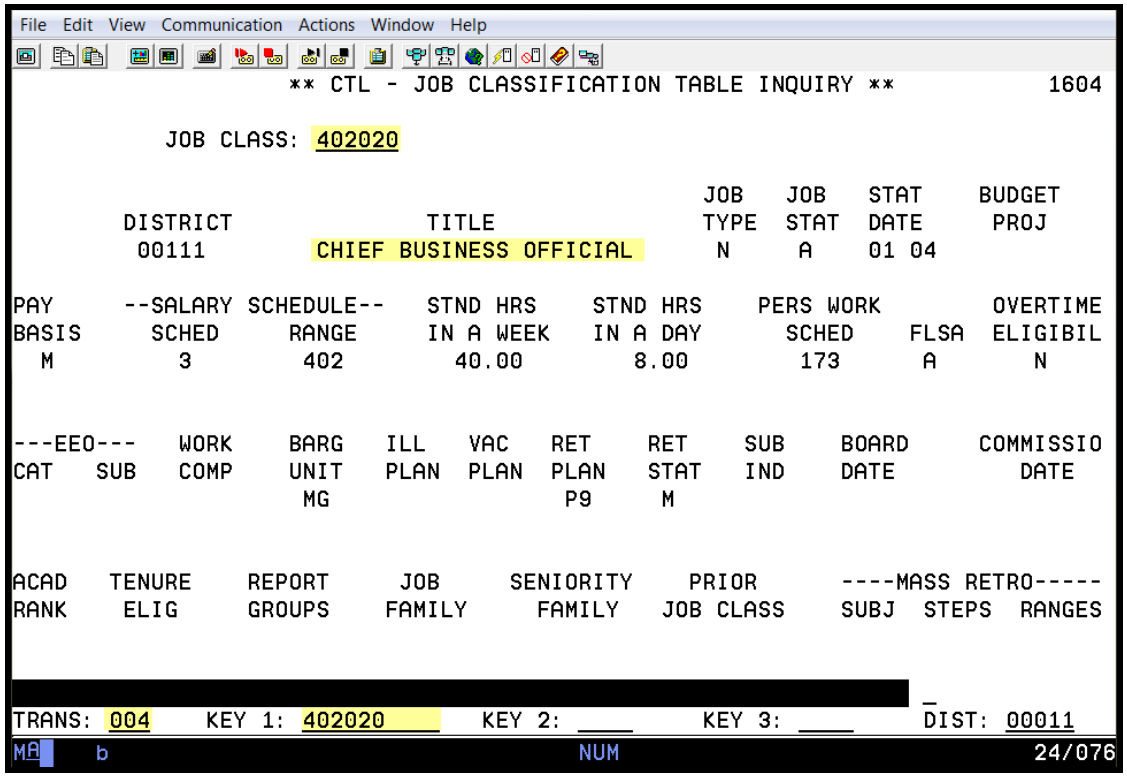


From the Table Search Screen, you can view the detail screen for a specific record by doing the following.

1. In the **Select field**, next to the item you want to examine, type **X**.
2. Hit the **Enter key** on your keyboard.

NOTE: There are tables that have an extra layer of search screens. For example, when searching the salary schedule tables (024 and 025), it displays all the current and past versions of the schedules available.

This is the detail screen of the record selected from the search screen.



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SECTION III.

HRS DISTRICT PAYROLL SCHEDULE

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Los Angeles County Office of Education
Leading Educators • Supporting Students • Serving Communities

DIVISION OF SCHOOL FINANCIAL SERVICES

HRS DISTRICT PAYROLL SCHEDULE

AUGUST 2017 ISSUE DATE

CYCLE	SCHEDULE	PAYROLL PERIOD FROM	PAYROLL PERIOD TO	MEMO	ISSUE DATE	PAYROLL PROD. DATE	TIME REPORT PRODUCTION	DD INPUT CUTOFF	SCHEDULE
C1	C1A	07-01-17	07-31-17	1STWD	08-01-17	07-27-17	07-18-17	07-21-17	C1A
V2	V2C	07-01-17	07-31-17	5TH	08-04-17	07-31-17	07-20-17	07-25-17	V2C
V1	V1E	07-16-17	07-31-17	5TH	08-04-17	07-31-17	07-20-17	07-25-17	V1E
E1	E1B	07-01-17	07-31-17	5TH	08-04-17	08-01-17	07-21-17	07-25-17	E1B
C5	C5A	07-01-17	07-31-17	5TH	08-04-17	08-01-17	07-21-17	07-25-17	C5A
E4	E4B	07-01-17	07-31-17	10TH	08-10-17	08-04-17	07-27-17	07-31-17	E4B
H1	H1B	07-16-17	07-31-17	10TH	08-10-17	08-04-17	07-27-17	07-31-17	H1B
C3	C3A	07-01-17	07-31-17	10TH	08-10-17	08-07-17	07-27-17	07-31-17	C3A
V1	V1F	08-01-17	08-15-17	20TH	08-18-17	08-14-17	08-03-17	08-08-17	V1F
E1	E1C	08-01-17	08-31-17	ESA	08-18-17	08-15-17	08-04-17	08-08-17	E1C
E4	E4C	08-01-17	08-31-17	ESA	08-25-17	08-21-17	08-11-17	08-15-17	E4C
H1	H1C	08-01-17	08-15-17	25TH	08-25-17	08-22-17	08-11-17	08-15-17	H1C
C2	C2B	08-01-17	08-31-17	LWD	08-31-17	08-25-17	08-17-17	08-21-17	C2B
C1	C1B	08-01-17	08-31-17	1STWD	09-01-17	08-29-17	08-18-17	08-22-17	C1B

Issue Dates may be changed based upon observed Bank holidays and County office closures. Observed holidays are considered non-work days.

Time Report Production Date	Time reports are produced this day. Employees to be listed on time report/screen must be loaded in EDB by 7:00 pm this day. District will have time reports/screens available the next day.
Payroll Production Date	Payroll is produced on this day. Time entry must be completed by 7:00 pm this day.
Issue Date	Issue date printed on warrants. Warrants are not to be released to employees prior to this date, per County Treasurer's Office.

If you have any questions regarding this schedule, please call the SFS-Payroll Section at (562) 922-6442.

See back page for Regular Verification & Supplemental Schedule

07-07-17

AUGUST 2017

HRS SUPPLEMENTAL PRODUCTION SCHEDULE

Production Date	For Verification Warrants Schedule	For Real Warrants Schedule	Issue Date Real Warrants
08/01/17	215	213	08/03/17
08/02/17	E4B,H1B,216	214	08/04/17
08/03/17	C3A,219	215	08/07/17
08/04/17	220	216	08/08/17
08/05/17	----	SAT	----
08/06/17	----	SUN	----
08/07/17	221	219	08/09/17
08/08/17	222	220	08/10/17
08/09/17	223	221	08/11/17
08/10/17	V1F,226	222	08/14/17
08/11/17	E1C,227	223	08/15/17
08/12/17	----	SAT	----
08/13/17	----	SUN	----
08/14/17	228	226	08/16/17
08/15/17	229	227	08/17/17
08/16/17	230	228	08/18/17
08/17/17	E4C,233	229	08/21/17
08/18/17	H1C,234	230	08/22/17
08/19/17	----	SAT	----
08/20/17	----	SUN	----
08/21/17	235	233	08/23/17
08/22/17	236	234	08/24/17
08/23/17	C2B,237	235	08/25/17
08/24/17	----	236	08/28/17
08/25/17	C1B,V2D,V1G	237	08/29/17
08/26/17	----	SAT	----
08/27/17	----	SUN	----
08/28/17	E1D,C5B,242	----	----
08/29/17	243	----	----
08/30/17	E4D,H1D,244	242	09/01/17
08/31/17	C3B,248	243	09/05/17

RETROACTIVE PRODUCTION SCHEDULE

Schedule	Transaction Gen Date	Production Date	Issue Date
R03	07/28/17	08/03/17	08/07/17
R04	08/04/17	08/10/17	08/14/17
R05	08/11/17	08/17/17	08/21/17
R06	08/18/17	08/24/17	08/28/17
R07	08/25/17	----	----

LACOE 2017-2018 OBSERVED HOLIDAYS

07-04-17	Independence Day	12-25-17	Christmas Holiday
09-04-17	Labor Day	12-29-17	New Year's Eve
11-10-17	Veteran's Day	01-01-18	New Year's Day
11-22-17	Thanksgiving Holiday	01-15-18	Martin Luther King Jr. Day
11-23-17	Thanksgiving Holiday	02-12-18	Lincoln's Birthday
11-24-17	Thanksgiving Holiday	02-19-18	Washington's Birthday
12-22-17	Christmas Holiday	05-28-18	Memorial Day

Issue dates may be changed based upon observed Bank holidays and County office closures. Observed holidays are considered non-work days.

07-07-17

SECTION IV.

NAME SEARCH SCREENS

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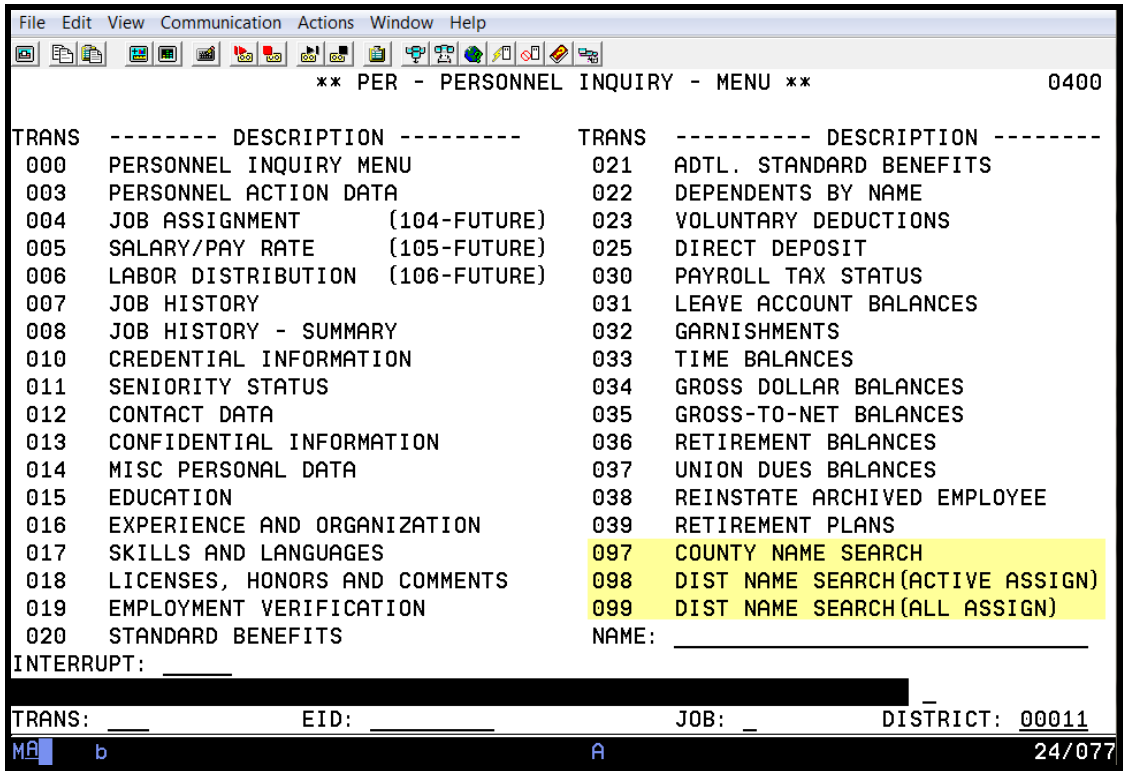
Name Search Screens (097, 098, 099)

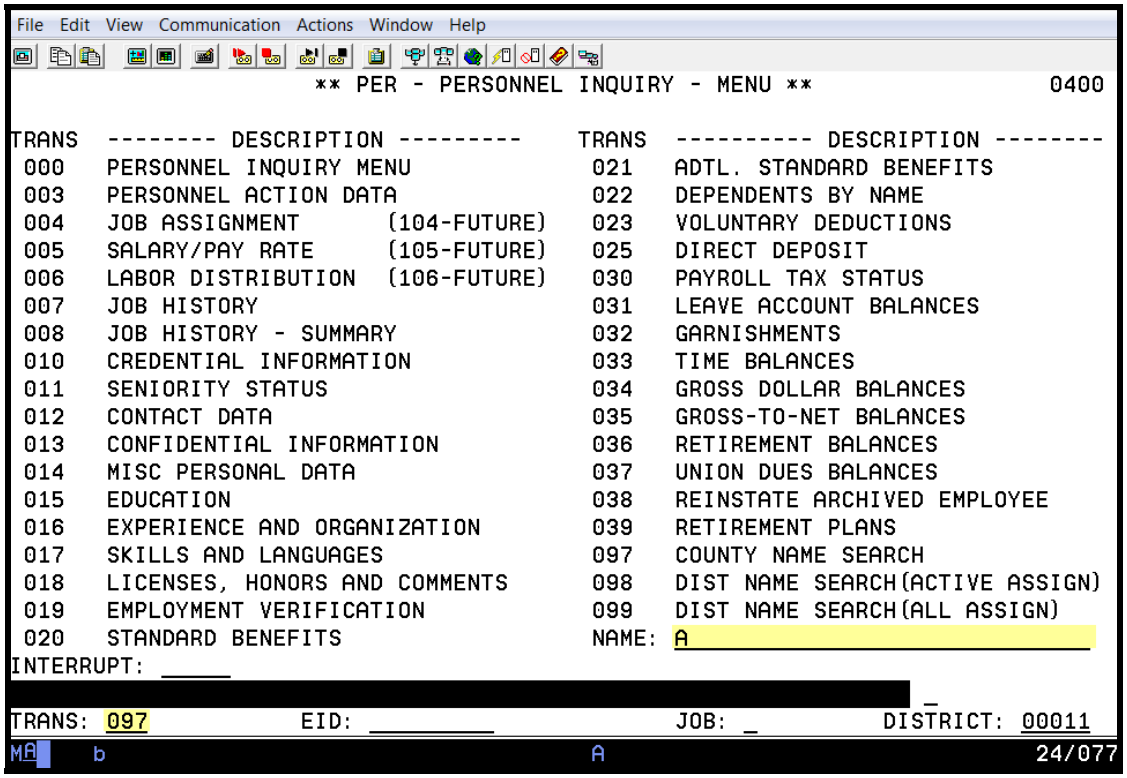


The Name Search screens provide quick access to selected employee data without accessing screens at the employee level. It can also be used to find the current name for an employee using a prior name. These search screens are used in Personnel (Function 01 or 04) and Pay History (Function 07). These screens are inquiry only. All data is pulled from EDB screens.

There are three name search screens: 097, 098, and 099.

	County Name Search (097)	District Name Search (098)	District Name Search (099)
Prime job assignments	✔	✔	✔
All job assignments			✔
Active	✔	✔	✔
Terminated	✔		✔
Archived	✔		✔
Non-Employee	✔	✔	✔
Future	✔	✔	✔
Leave (Paid or Unpaid)	✔	✔	✔

Navigate to a Name Search Screen from the Transaction Menu



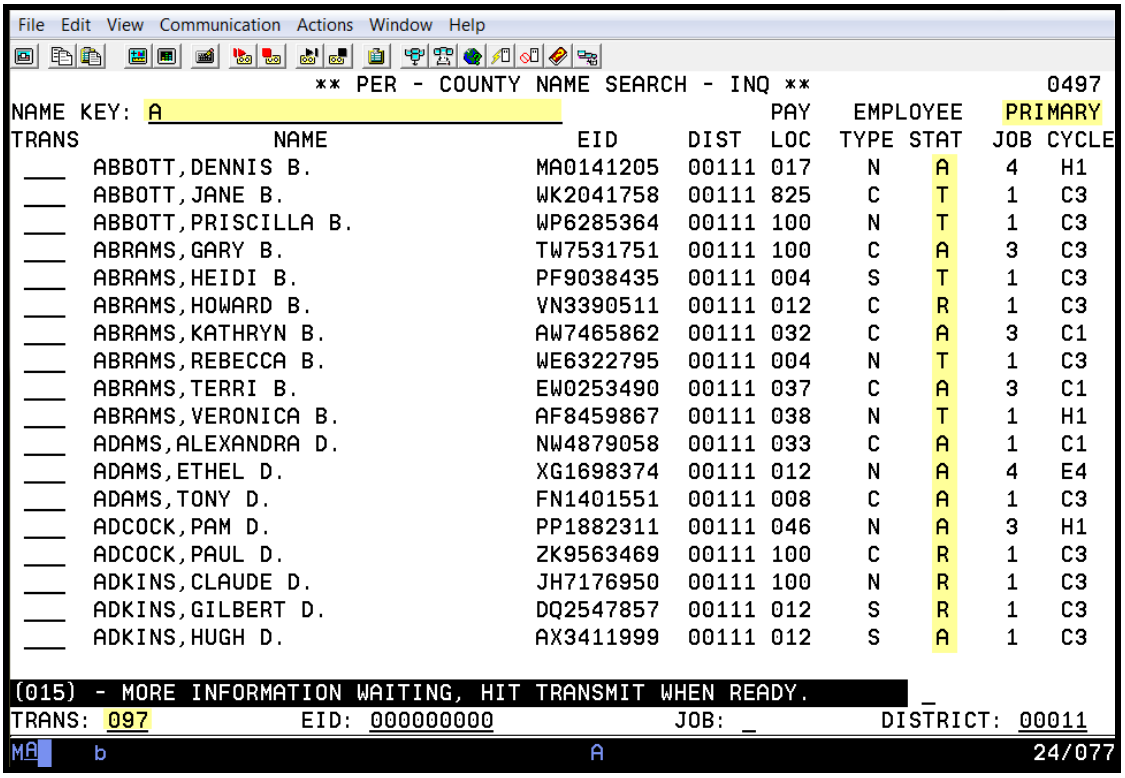
To access the name search screens from the transaction menu,

1. In the **TRANS field**, type the transaction number (**097**, **098**, or **099**).
2. In the **NAME field**, type the employee's name using the following valid formats. When including the first name, enter a comma between the last name and first name.
   - Partial last name –or–
   - Full last name –or–
   - Full last name and the partial first name –or–
   - Full last name and the full first name
3. Hit the **Enter key** on your keyboard.

The system navigates to the name search screen.

NOTE: When a name is changed in HRS, the current name is listed on the name search screen in place of the prior name. If the prior name begins with the same letter as the current name, the current name is listed twice on the name search screen.

County Name Search (097)

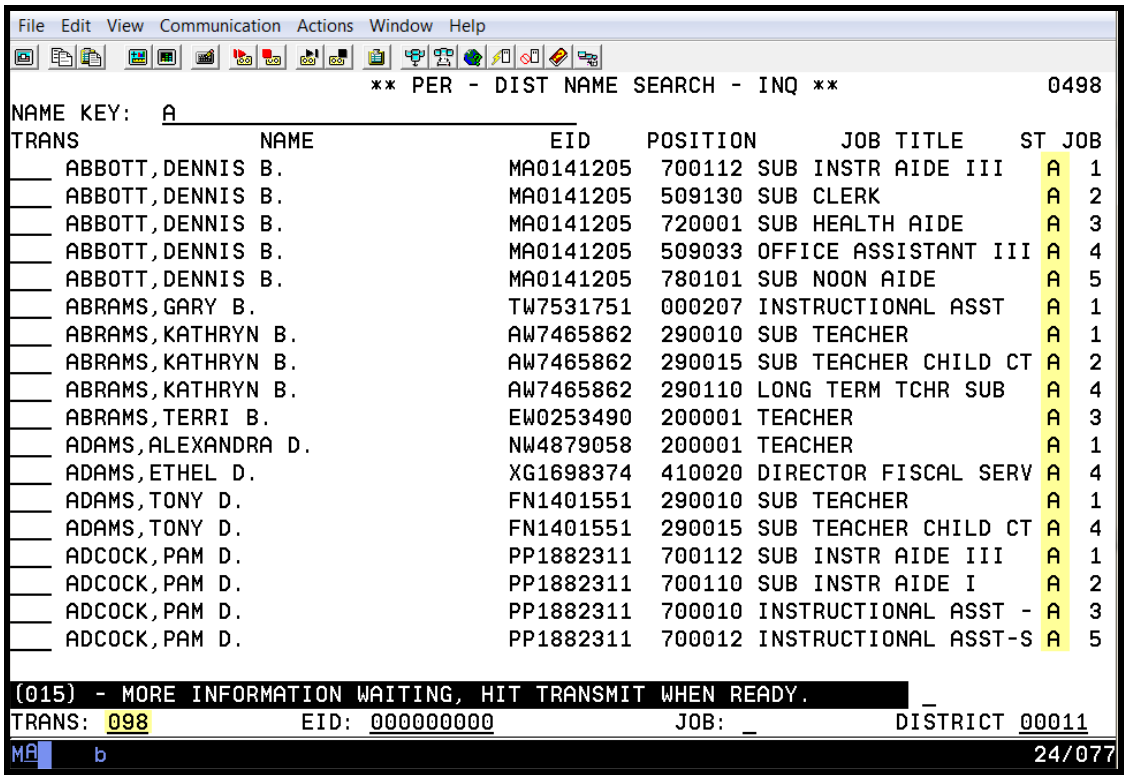


The County Name Search screen (097) lists **only primary jobs for all employees**. Refer to Page 29 or to the HRS Operations Manual, beginning on Section I, Page 33, for more information.

Field	Field Description
^ Name Key	Enter the employee's name using the following valid formats. Between the last name and first name, enter a comma with no spaces. • Partial last name –or– • Full last name –or– • Full last name and the partial first name –or– • Full last name and the full first name
Trans	Enter a transaction code next to the employee name to access the transaction detail screen.

^ Required field

District Name Search - Active Assignments (098)

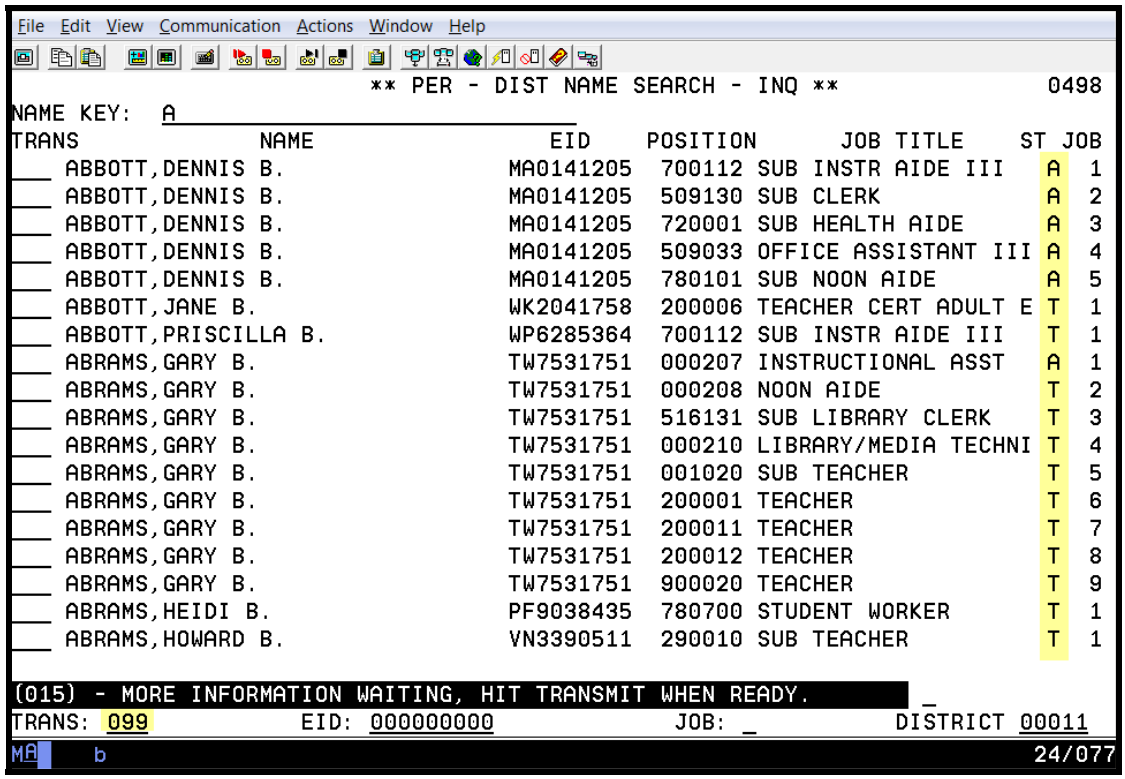


The District Name Search-Active Assignments (098) screen lists **all active job assignments**. Refer to Page 29 or to the HRS Operations Manual, beginning on Section I, Page 33, for more information.

Field	Field Description
^ Name Key	Enter the employee's name using the following valid formats. Between the last name and first name, enter a comma with no spaces. • Partial last name –or– • Full last name –or– • Full last name and the partial first name –or– • Full last name and the full first name
Trans	Enter a transaction code next to the employee name to access the transaction detail screen.

^ Required field

District Name Search - All Assignments (099)



The District Name Search-All Assignments (099) lists **all job assignments including archived and terminated assignments**. Refer to Page 29 or to the HRS Operations Manual, beginning on Section I, Page 33, for more information.

Field	Field Description
^ Name Key	Enter the employee's name using the following valid formats. Between the last name and first name, enter a comma with no spaces. • Partial last name –or– • Full last name –or– • Full last name and the partial first name –or– • Full last name and the full first name
Trans	Enter a transaction code next to the employee name to access the transaction detail screen.

^ Required field

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SECTION V.

TRANSACTIONS AND ACTION CODES

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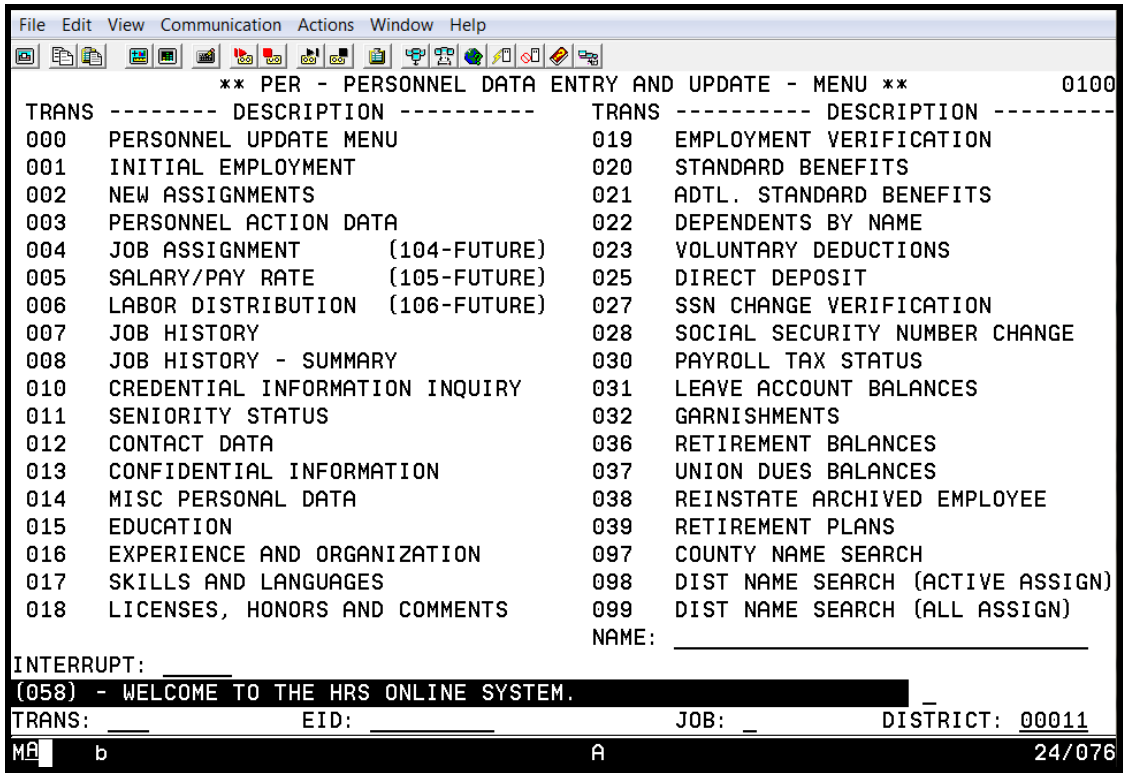
Transaction Menu for Function 01



Function 01, Personnel Data Entry and Update, is used to add or delete employees/jobs, add or change credential codes, salary data, job related data, benefit, voluntary deductions, tax data, garnishments, seniority and leave balances, and various personal data.

System Required Screens

For each employee, there are screens that must be completed for personnel, payroll, and retirement processing. Some data on these screens is optional. To ensure that the required data is complete and the correct line of Job History is written for a new employee, the system has a transaction "001" which automatically pages through the personnel screens listed below:

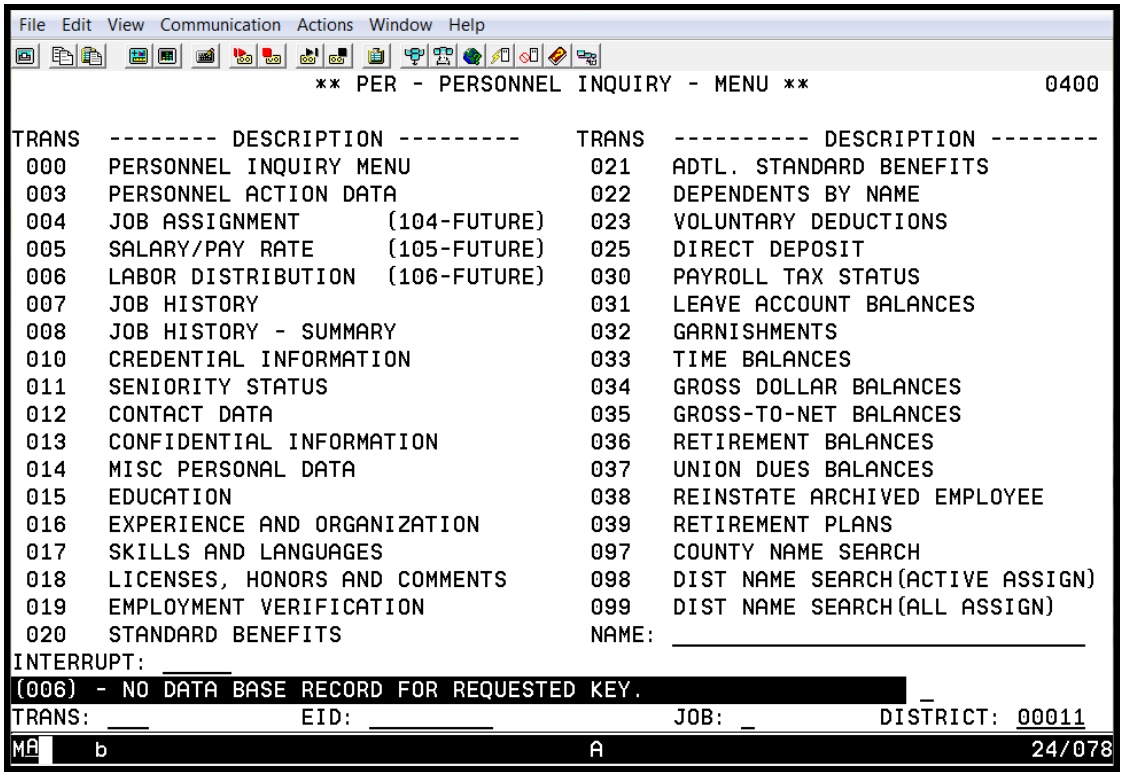
Personnel Action Data	(003)	Labor Distribution	(006)
Job Assignment	(004)	Contact Data	(012)
Salary/Pay Rate	(005)	Confidential Information	(013)

Additional required screens that must be completed before payroll processing are:

Standard Benefits	(020)*
Additional Standard Benefits	(021)*
Voluntary Deductions	(023)*
Payroll Tax Status	(030)

* Depending on the benefit options selected by the district, the Benefit Screens may not be used. If the employee has no voluntary deductions, the Voluntary Deduction Screen may not be used. Please refer to your HRS Systems Operation Manual, beginning with Section III, Page 216, Benefits and Voluntary Deductions, for an explanation of how to use these screens.

Transaction Menu for Function 04



Function 04, Personnel Inquiry, is used to inquire any of the data entered in Function 01 and displays Time Balances, Gross Dollar Balances and Gross-To-Net Balances.

Action Codes

District Action Codes

Action Code	Description	Use
01	INITIAL EMPLOYMENT	New employee for past, current, or future date. See EDB New Employee Section.
02	LEAVE OF ABSENCE WITH PAY	To change job to paid leave status for past, current, or future date. See EDB Begin Leave Section.
03	LEAVE OF ABSENCE WITHOUT PAY	To change job to unpaid leave status for past, current, or future date. See EDB Begin Leave Section.
04	RETURN FROM LEAVE OF ABSENCE	To return job to active status from paid or unpaid leave of absence. See EDB Return From Leave Section.
05	TERMINATION	To change job to terminated status for past, current, or future date. See EDB Termination Section.
06	PROMOTION	Employee changing to assignment with a higher salary allocation. See EDB Assignment Changes Section.
07	JOB RECLASSIFICATION	Employee job is reassigned from one classification title to another because of a significant change in minimum qualifications, duties, or responsibilities, generally with a salary change. See EDB Assignment Changes Section.
08	DEMOTION	Employee is moving to an assignment with a lower salary allocation. See EDB Assignment Changes Section.
09	JOB ASSIGNMENT CHANGE	Employee is moving to another assignment. This may involve a salary change.
10	TRANSFER	Reassigning an employee from one job to another in the same classification or to a job in a similar classification with the same salary allocation. Each district will usually have a precise definition of "transfer" in district policies. See EDB Assignment Changes Section.
11	REEMPLOYMENT	Returning a laid off employee to a job in the classification from which terminated. See EDB Assignment Changes Section.
12	REHIRE	Appointing an ex-employee to a job.

District Action Codes (continued)

13	ADD ASSIGNMENT	Appointing an employee with at least one current job to an additional assignment. See EDB Additional Assignment Section.
14	REAPPOINTMENT	Returning an employee who, as a result of a reduction in force, has been serving in a lower classification to an assignment in the classification from which they were released. This usually will be accompanied with a salary change. See EDB Assignment Changes Section.
15	REASSIGNMENT	Moving an employee from one position to another in the same classification or to a position in a similar classification with the same salary. Each district will usually have a precise definition of "reassignment" in district policies. See EDB Assignment Changes Section.
16	RETIREMENT CHANGE	A change in retirement data on Salary/Pay Rate Screen (005) for a specific job.
17	SALARY CHANGE	A change in salary on Salary/Pay Rate Screen (005) for a specific job.
18	LABOR DISTRIBUTION CHANGE	A change of labor distribution information on Labor Distribution Screen (006) for a specific job.
19	END OF ASSIGNMENT	To input or change the termination date (end of an assignment) for a limited-term assignment.
20	STATUS CHANGE	A change in the official status of an employee. Typically moving from probationary to permanent or tenured.
21	DATA CHANGE	A change in employee information.
22	DATA CORRECTION	A correction to employee information.

SFS Action Codes/Automated Processes

SFS USE ONLY:

90	RETIREMENT CHANGE	Change to retirement data by SFS staff.

Automated Processes

81	Automated entry when Job History was modified (July 1991).
01, 21, 22	Future employee becomes active.
02, 21, 22	Future begin leave action processes job to paid leave status ("P" job status).
03, 21, 22	Future begin leave action processes job to unpaid leave status ("L" job status).
04, 21, 22	Return from leave processes changes job to active status.
05, 21,22	Future termination processes job to terminated status ("T" job status).
13, 21, 22	Future additional assignment becomes active.
17, 22, 21	Anniversary step increase.
17, 21, 22	Salary or stipend table roll updates salary.
XX, XX, 91	Future dated transaction becomes active.
XX, XX, 92	EDB Mass Change (requested by district).
XX, XX, 95	Position Control
05, XX, 96	EDB Record Archive.

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SECTION VI.

NEW CLASSIFIED EMPLOYEE SCREENS AND REPORTS

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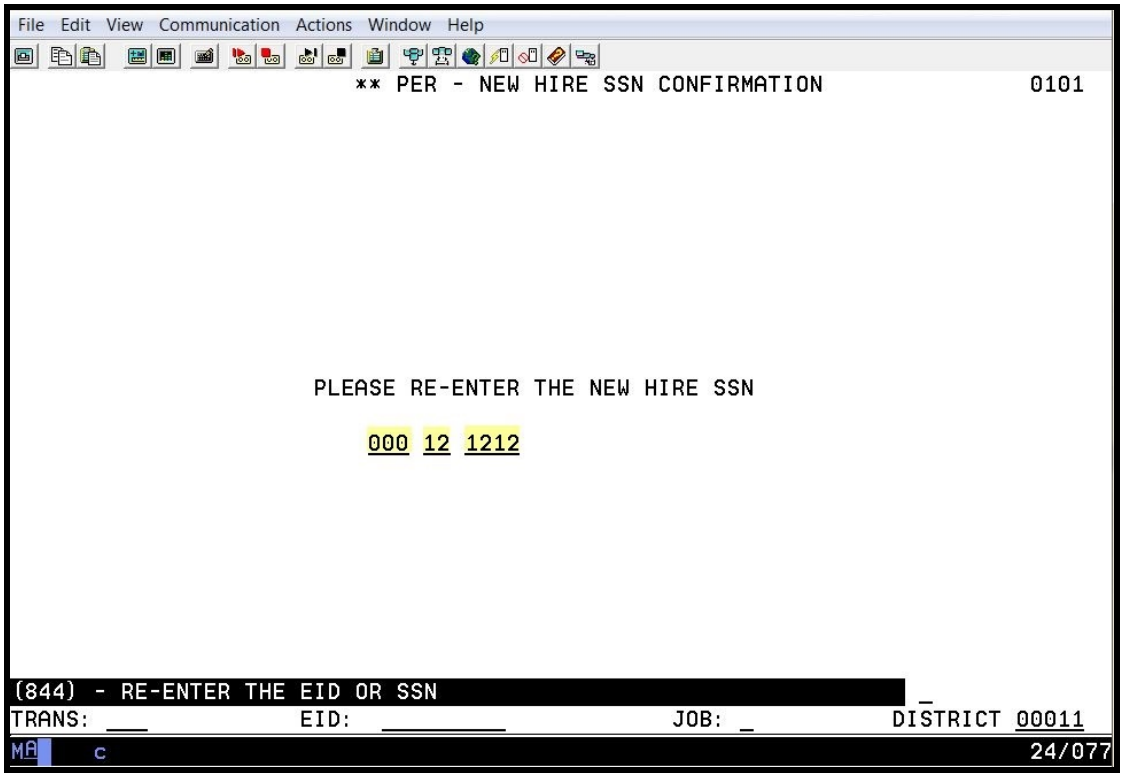
Personnel Data Entry and Update Menu (000)

```
File  Edit  View  Communication  Actions  Window  Help
                 ** PER - PERSONNEL DATA ENTRY AND UPDATE - MENU **          0100
 TRANS -------- DESCRIPTION ----------    TRANS ---------- DESCRIPTION ---------
 000   PERSONNEL UPDATE MENU              019   EMPLOYMENT VERIFICATION
 001   INITIAL EMPLOYMENT                 020   STANDARD BENEFITS
 002   NEW ASSIGNMENTS                    021   ADTL. STANDARD BENEFITS
 003   PERSONNEL ACTION DATA              022   DEPENDENTS BY NAME
 004   JOB ASSIGNMENT      (104-FUTURE)   023   VOLUNTARY DEDUCTIONS
 005   SALARY/PAY RATE     (105-FUTURE)   025   DIRECT DEPOSIT
 006   LABOR DISTRIBUTION  (106-FUTURE)   027   SSN CHANGE VERIFICATION
 007   JOB HISTORY                        028   SOCIAL SECURITY NUMBER CHANGE
 008   JOB HISTORY - SUMMARY              030   PAYROLL TAX STATUS
 010   CREDENTIAL INFORMATION INQUIRY     031   LEAVE ACCOUNT BALANCES
 011   SENIORITY STATUS                   032   GARNISHMENTS
 012   CONTACT DATA                       036   RETIREMENT BALANCES
 013   CONFIDENTIAL INFORMATION           037   UNION DUES BALANCES
 014   MISC PERSONAL DATA                 038   REINSTATE ARCHIVED EMPLOYEE
 015   EDUCATION                          039   RETIREMENT PLANS
 016   EXPERIENCE AND ORGANIZATION        097   COUNTY NAME SEARCH
 017   SKILLS AND LANGUAGES               098   DIST NAME SEARCH (ACTIVE ASSIGN)
 018   LICENSES, HONORS AND COMMENTS      099   DIST NAME SEARCH (ALL ASSIGN)
                                          NAME: ______________________________
INTERRUPT: _____
(058) - WELCOME TO THE HRS ONLINE SYSTEM.                                  _
TRANS: 001          EID: 000121212          JOB: _          DISTRICT: 00011
MA    b                                A                                24/076
```

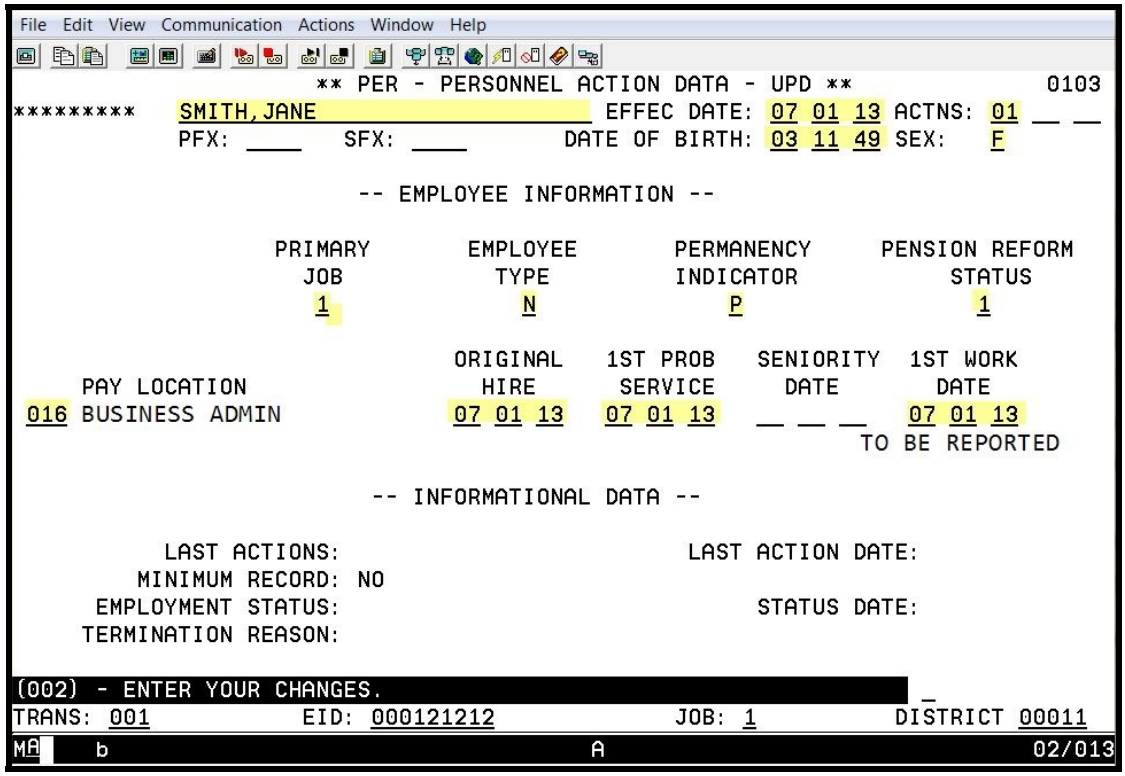
New Hire SSN Confirmation Screen (001)



If the social security number entered on the Personnel Data Entry and Update Menu (000) does not match the social security number entered on this screen, the system will generate an error message, "(846) – EID OR SSN DO NOT MATCH – NO CONFIRMATION." The system will not allow you to proceed without doing one of the following.

- If you entered the number incorrectly on this page, type the correct number, and hit the Enter key on your keyboard.
- If you entered the number incorrectly on the previous page, in the action field, type M for menu, and hit the Enter key on your keyboard. On the Personnel Entry and Update Menu, type the correct number, and hit the Enter key on your keyboard. Continue with the confirmation process.

Personnel Action Data Screen (003)

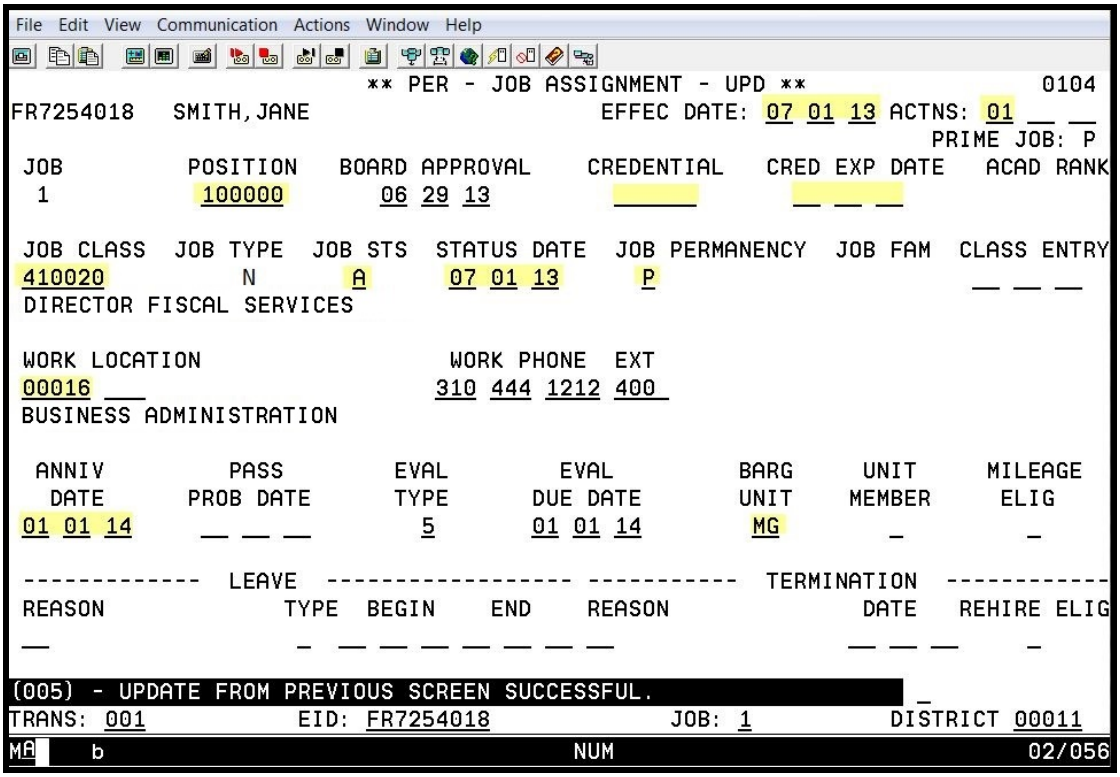


The highlighted fields are required fields.

This is an employee-level screen. Only one screen exists for each employee regardless of the number of job assignments. Please refer to your HRS System Operations Manual, beginning with Section III, Page 19, for the description of each field shown on this screen.

NOTE: The pay location code identifies the location used for warrant distribution. Warrants are sorted in alpha order within this pay location. This code is from the District Codes Table (028), code type is PL.

Job Assignment (004)

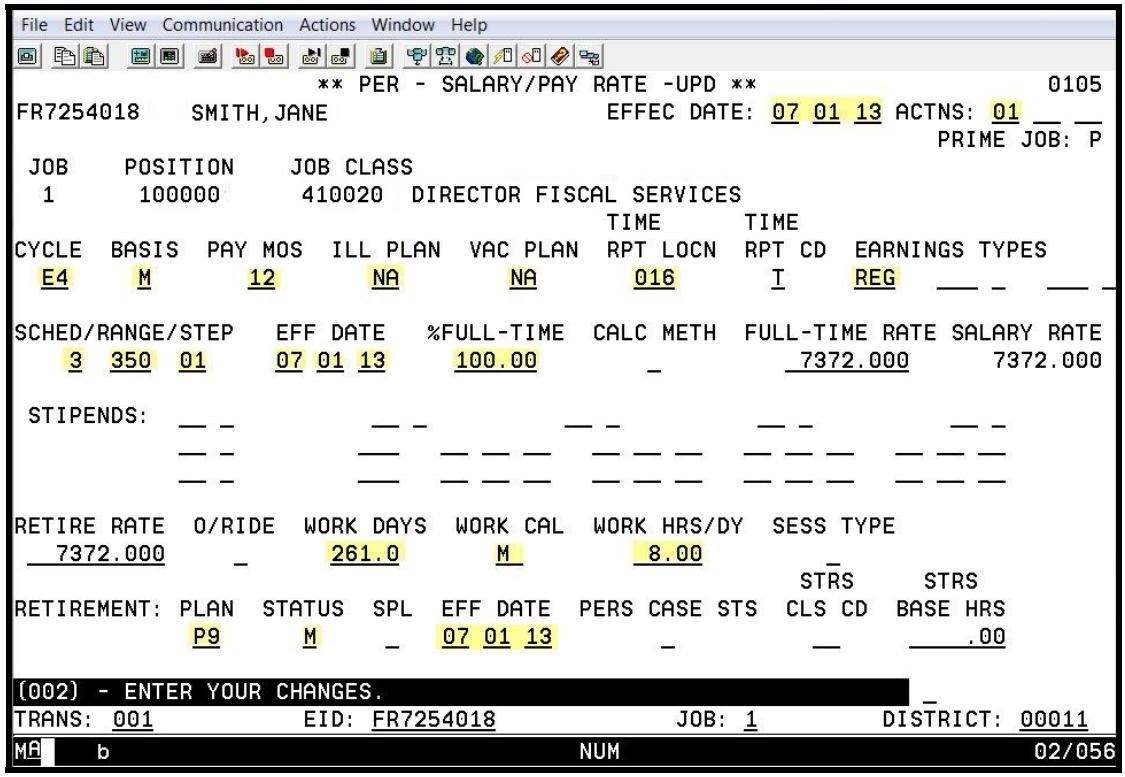


The highlighted fields are required fields.

This is a job-level screen. An employee may have as many as nine of these screens. This screen maintains basic job information, not including salary, retirement, or labor distribution. Please refer to your HRS System Operations Manual, beginning with Section III, Page 24, for the description of each field shown on this screen.

NOTE: The work location and subsite code is used for personnel reporting and distribution of materials. It identifies the physical location of the employee. This code is from the Work Location Table (011).

Salary/Pay Rate (005)



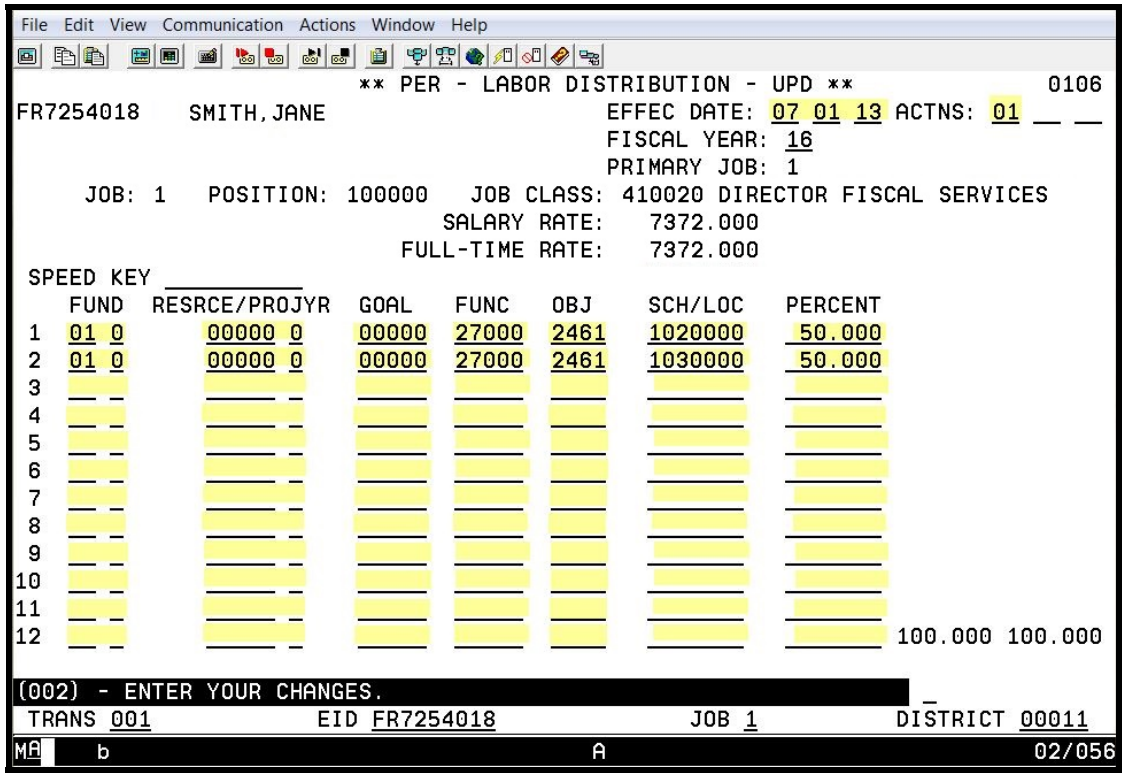
The highlighted fields are required fields.

This is a job-level screen. An employee may have as many as nine of these screens. This screen maintains the salary and retirement information for each assignment. Please refer to your HRS System Operations Manual, beginning with Section III, Page 30, for the description of each field shown on this screen.

NOTE: The time report code determines where the job is listed on the time report. If an employee has multiple job assignments, each assignment could have a different code. The time report is sorted in alpha order by name within each time report location and job type.

This code is from the District Codes Table (028), code type is PL. It defaults to the pay location code enter on the Personnel Action Data Screen (003) if no code is entered.

Labor Distribution (006)

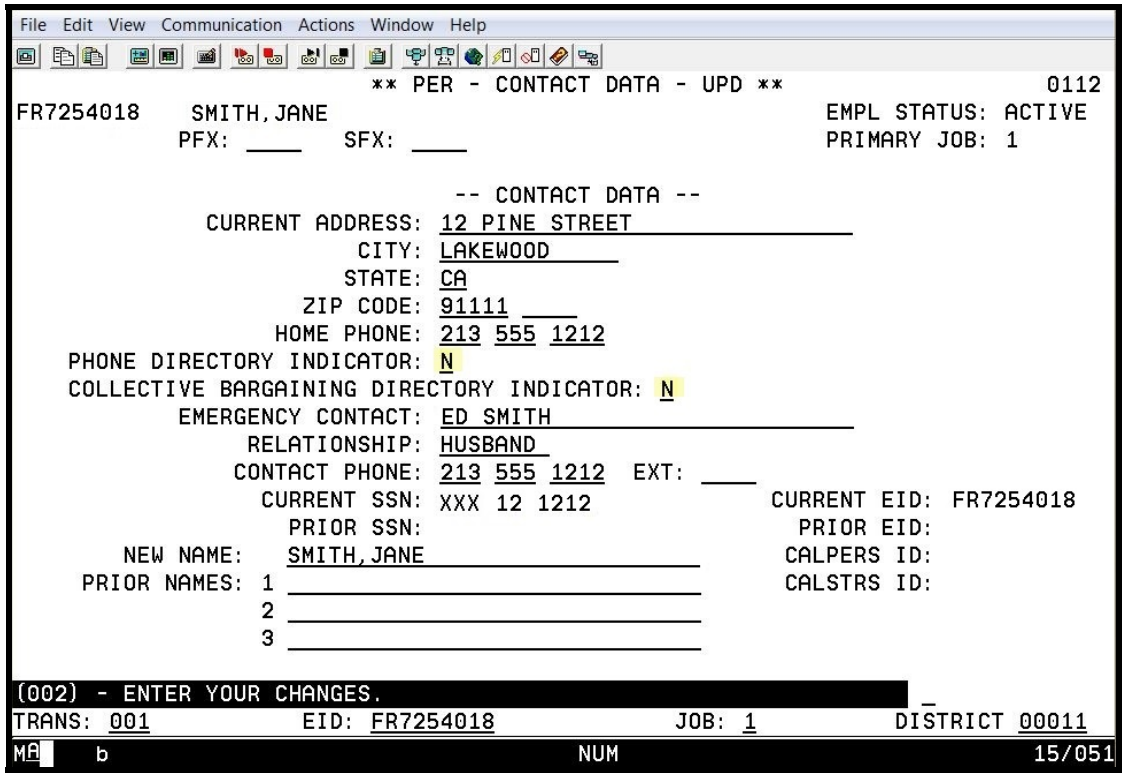


The highlighted fields are required fields for each labor distribution line entered.

This is a job-level screen. An employee may have as many as 18 of these screens. For each job/assignment, there can be one to two screens. There can be from 1 to 24 account labor distributions with varying percentages totaling 100 percent. Please refer to your HRS Operations Manual, beginning with Section III, Page 38, for the description of each field shown on this screen.

NOTE: For Position Control districts, the system will automatically update the labor distribution information for employees assigned to the position.

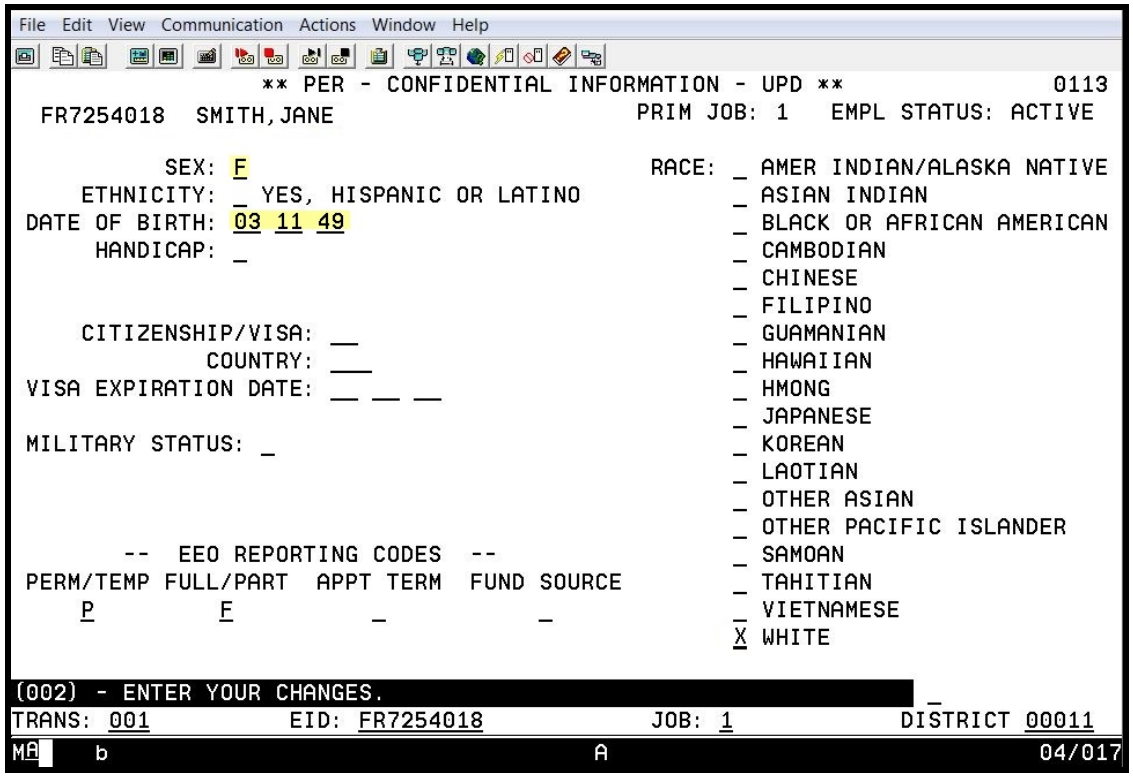
Contact Data (012)



The highlighted field is a required field.

This is an employee-level screen, only one screen per employee. Please refer to your HRS System Operations Manual, beginning with Section III, Page 44, for the description of each field shown on this screen.

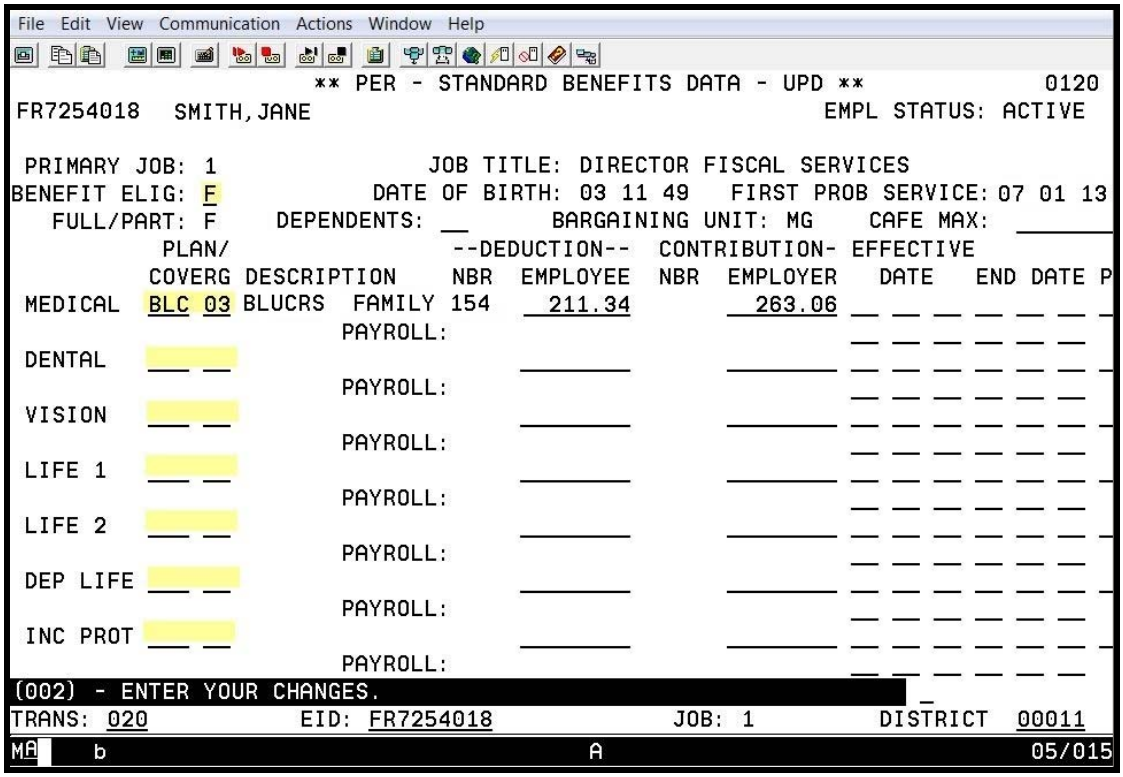
Confidential Information (013)



The highlighted fields are required fields.

This is an employee-level screen. The date of birth and gender are automatically input on this screen from the Personnel Action Data Screen (003) and are required for retirement reporting. Please refer to your HRS System Operations Manual, beginning with Section III, Page 48, for the description of each field shown on this screen.

Standard Benefits Data (020)

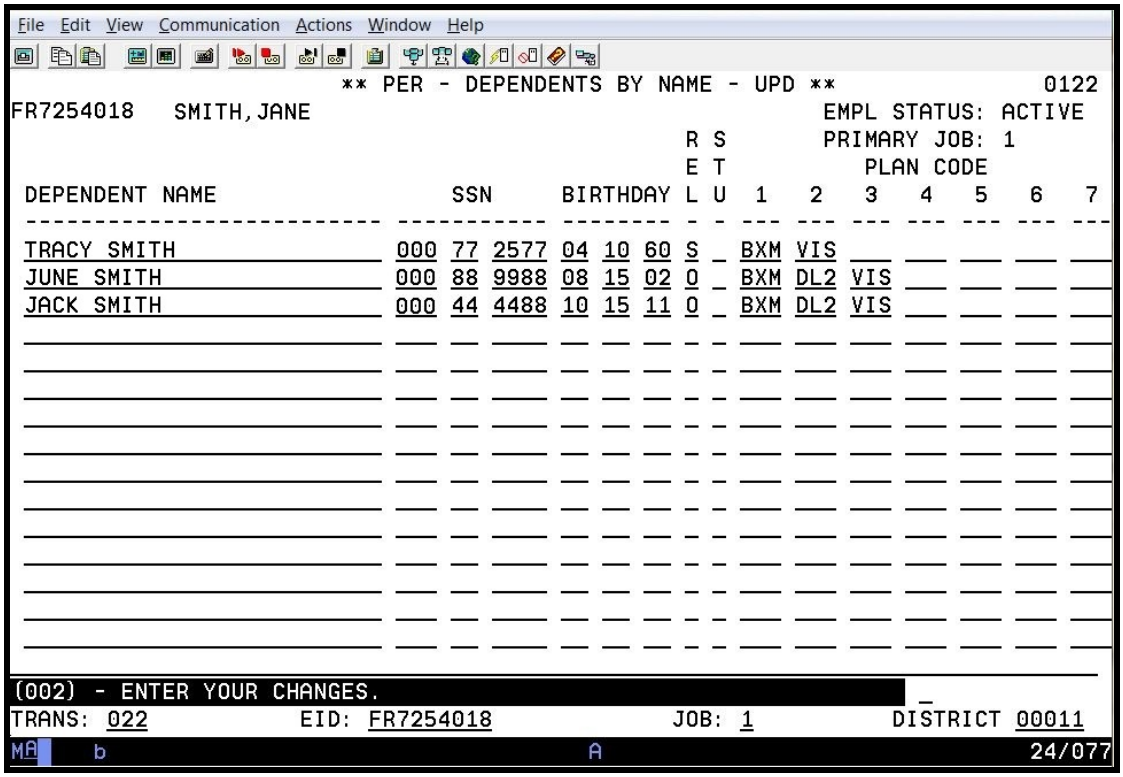


The highlighted fields are required fields for each specified benefit being added.

This is an employee level screen. There is only one screen for each employee. Additional employee benefits can be input on the Additional Standard Benefits Screen (021).

These two benefit screens use plan codes and level of coverage from the Benefits Table (027). Please refer to your HRS System Operations Manual, beginning with Section III, Page 54, for the description of each field shown on these screens.

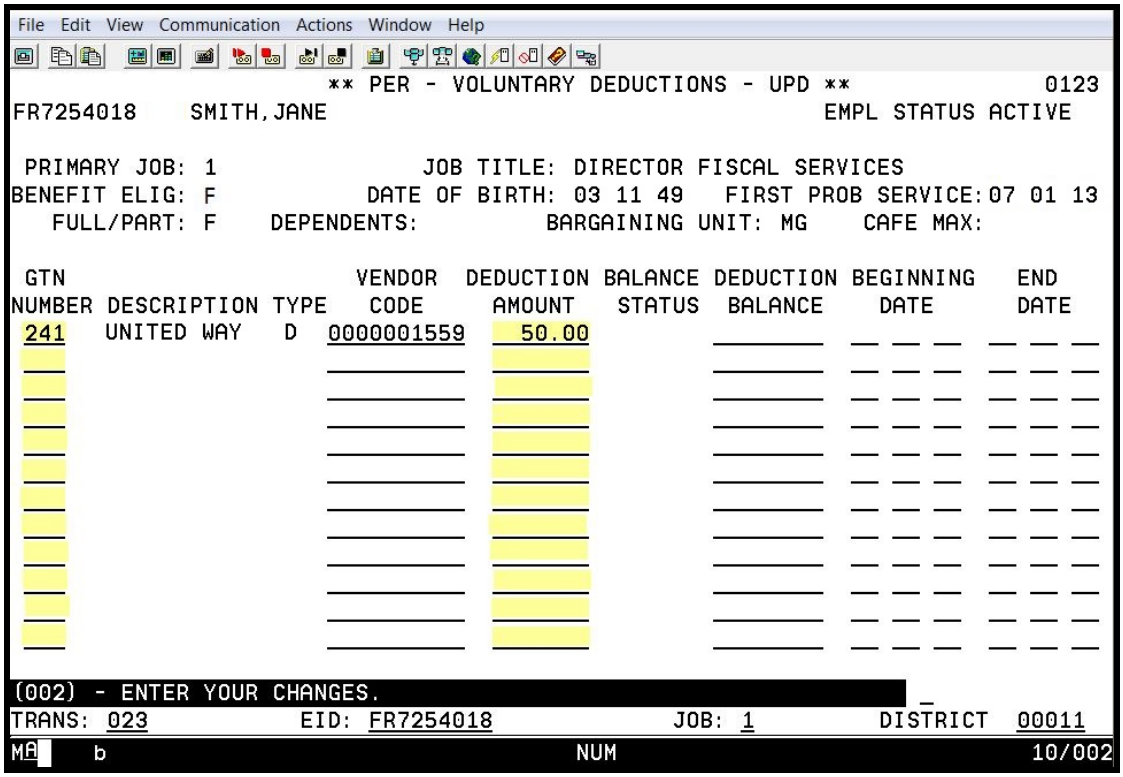
Dependents by Name Screen (022)



This is an employee level screen. There is only one screen for each employee.

The Dependents By Name Screen allows for entering and maintaining an employee's dependents and their related benefits data. The benefits data includes each of the dependent's benefit plans.

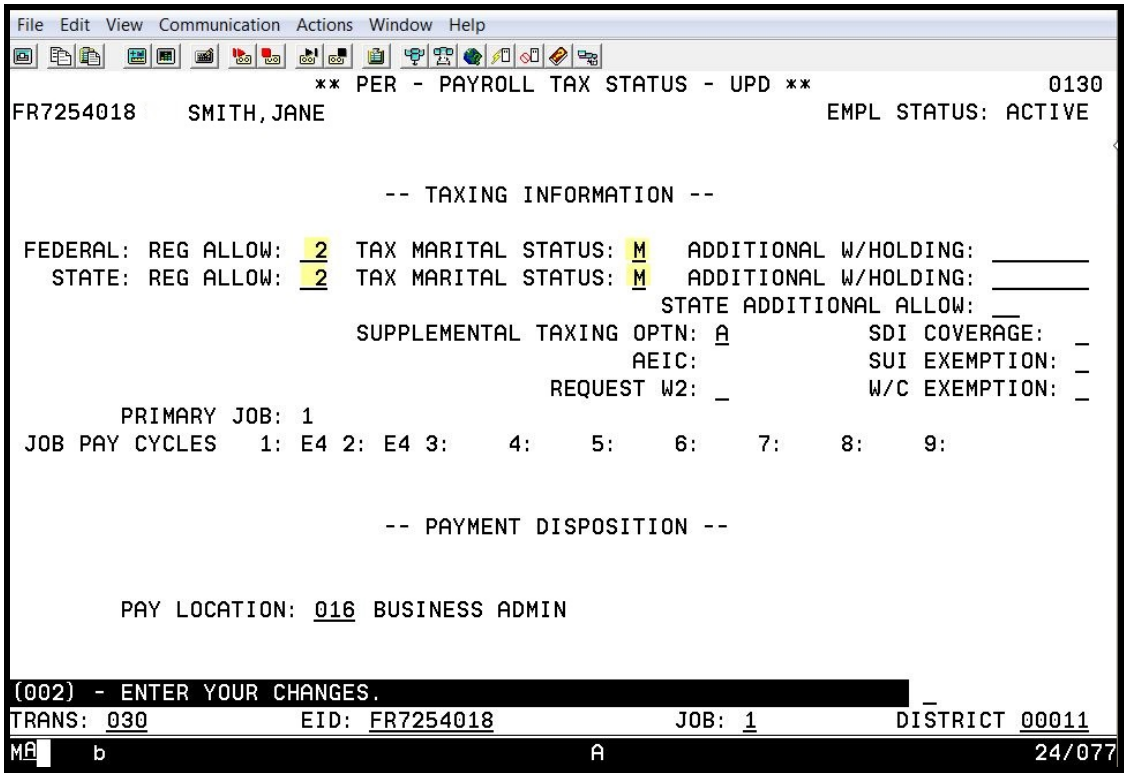
Voluntary Deductions (023)



The highlighted fields are required fields for each voluntary deduction being added.

This is an employee-level screen, only one for each employee. Twelve voluntary deductions can be input on this screen. Please refer to your HRS System Operations Manual, beginning with Section III, Page 62, for the description of each field shown on this screen.

Payroll Tax Status (030)



The highlighted fields are required fields.

This is an employee-level screen, only one screen for each employee. Please refer to your HRS System Operations Manual, beginning with Section III, Page 68, for the description of each field shown on this screen.

Reports

Employee Information Report (EIR)

Change Register Report (AIMS140)

Employee Information Report (EIR)

The Employee Information Report is a hard copy report that is generated when a change is made to any of the following screens listed below in HRS.

- Personnel Action Data Screen (003)
- Job Assignment Screen (004)
- Salary/Pay Rate Screen (005)
- Labor Distribution Screen (006)

Districts can request up to five copies and have it sorted in either alphabetical order or by the employee's identification number (EID). Districts have the option to opt out of receiving this report.

EMPLOYEE INFORMATION REPORT

HRS INPUT / OUTPUT

DATE PRINTED: 08 16 11

003 PERSONNEL ACTION

1.EMPLOYEE NAME (LAST,FIRST,MIDDLE) AND ADDRESS OF EMPLOYEE — PFX — SFX
SMITH,JANE
12 PINE STREET
LAKEWOOD CA 91111

2.DISTRICT NO.: 00011 — DISTRICT NAME: SFS TRAINING DIST
3.EID: FR7254018 — PRS: 1

4.PRIME JOB	5.EMP TYPE	6.PERM IND	7.EFFECTIVE DATE	8.ACTIONS
1	N	P	08 16 11	01

ACTION CODES: 01 INIT.EMPLOY, 02 LOA W/PAY, 03 LOA W/O PAY, 04 RET FROM LOA, 05 TERMINATION, 06 PROMOTION, 07 JOB RECLASS, 08 DEMOTION, 09 JOB ASSIGN.CHG., 10 TRANSFER, 11 REEMPLOY, 12 REHIRE, 13 NEW ASSIGN., 14 REAPPOINT., 15 REASSIGNMENT, 16 RETMNT.CHG., 17 SALARY CHG., 18 LABOR DIST.CHG., 19 END OF ASSIGN., 20 STATUS CHG., 21 DATA CHG., 22 DATA CORRECT.

9.PAY LOCATION	10.ORIGINAL HIRE	11.FIRST PROB SERVICE	12.SENIORITY DATE	13.1ST WORK DATE
016 BUSINESS ADMIN	07 01 13	07 01 13		07 01 13

004 JOB ASSIGNMENT

14.JOB	15.POSITION	16.BOARD APPROVAL DATE	17.CREDENTIAL	18.CREDENTIAL EXPIRATION	19.ACADEMIC RANK
1	100000	06 29 13			

20.JOB CLASSIFICATION	21.JOB TYPE	22.JOB STATUS	23.STATUS DATE	24.JOB PERMANENCY	25.JOB FAM	26.CLASS ENTRY
410020 DIRECTOR OF FISCAL SERVICES	N	A	07 01 11	P PERMANEN		

27.WORK LOCATION	29.WORK TELEPHONE NUMBER	EXTENSION
00016 BUSINESS ADMINISTRATION	(310) 444-1212	X400

30.ANNIVERSARY DATE	31.PASS PROBATION DATE	32.EVAL TYPE	33.EVAL.DUE DATE	34.BARG UNIT	35.UNIT MEMBER	36.MILEAGE ELIGIBILITY
01 01 14		5	01 01 14	MG		

38.LEAVE REASON	39.LEAVE TYPE	40.BEGIN LEAVE	41.END LEAVE	42.TERMINATION REASON	43.TERMINATION DATE	44.REHIRE ELIG

005 SALARY/PAY RATE

45.PAY CYCLE	46.PAY BASIS	47.PAY MONTHS	48.ILL PLAN	49.VAC PLAN	50.TIME RPT LOCN	51.TIME RPT CODE	52.EARNINGS TYPE	53.EARN TYPE/PAY BASIS 2	54.EARN TYPE/PAY BASIS 3
E4	M	12	NA	NA	016	T	REG		

55.SCHEDULE	56.RANGE/COL	57.STEP	58.EFFECTIVE DATE	59.% FULL TIME	60.CALC METH	61.FULL TIME RATE	62.SALARY RATE
3	350	01	07 01 11	100.00 %		7,372.000	7,372.000

STIPENDS

63.	64.	65.	66.	67.

68.	68A	68B	68C	68D	68E

69.	69A	69B	69C	69D	69E

70.RET.RPT.RATE	71.OVERRIDE	72.WORKDAYS	73.WORK CALENDAR	74.WORK HRS/DAYS	75.SESSION TYPE
7,372.00		261.0	M	8.00	

RETIREMENT	76.PLAN	77.STATUS	78.SPL	79.EFFECTIVE DATE	80.PERS CASE STATUS
	P9	M		07 01 11	

006 LABOR DISTRIBUTION

FUND	RESRCE/PRJYR	GOAL	FUNC	OBJ	SCH/LOC	PERCENT	FUND	RESRCE/PRJYR	GOAL	FUNC	OBJ	SCH/LOC	PERCENT
81. 01.0	82. 00000.0	83. 00000	84. 270000	85. 2461	86. 1020000	87. 50.000%	165.	166.	167.	168.	169.	170.	171.
88. 01.0	89. 00000.0	90. 00000	91. 270000	92. 2461	93. 1030000	94. 50.000%	172.	173.	174.	175.	176.	177.	178.
95.	96.	97.	98.	99.	100.	101.	179.	180.	181.	182.	183.	184.	185.
102.	103.	104.	105.	106.	107.	108.	186.	187.	188.	189.	190.	191.	192.
109.	110.	111.	112.	113.	114.	115.	193.	194.	195.	196.	197.	198.	199.
116.	117.	118.	119.	120.	121.	122.	200.	201.	202.	203.	204.	205.	206.
123.	124.	125.	126.	127.	128.	129.	207.	208.	209.	210.	211.	212.	213.
130.	131.	132.	133.	134.	135.	136.	214.	215.	216.	217.	218.	219.	220.
137.	138.	139.	140.	141.	142.	143.	221.	222.	223.	224.	225.	226.	227.
144.	145.	146.	147.	148.	149.	150.	228.	229.	230.	231.	232.	233.	234.
151.	152.	153.	154.	155.	156.	157.	235.	236.	237.	238.	239.	240.	241.
158.	159.	160.	161.	162.	163.	164.	242.	243.	244.	245.	246.	247.	248.

FOR DISTRICT/AGENCY USE

BIRTH DATE	HOME TELEPHONE NUMBER
03 11 49	(213) 555-1212

EIR 01-29-2010

Change Register (AIMS140)

The Change Register Report is generated when a change is made to any EDB screen in HRS. It captures the data before and after the change was made. It also records the unique operator identification code of the user that made the change.

Districts can request up to five copies and have it sorted in either alphabetical order or by the employee's identification number (EID). Districts receive a soft copy of this report through HRS Personnel Reports in RAD. If you do not have access to this feature in RAD, please contact the HRS Operations and Security Unit at SFSSecurity@lacoe.edu.

AIMS140/PP1800XX/032188 PERSONNEL/PAYROLL/RETIREMENT SYSTEM PAGE NO. 0001

RUN TIME 21:16:18 DATA BASE AUDIT SERIES RUN DATE 08/16/15
PROCESS DATE 08/16/15 h

CHANGE REGISTER

DISTRICT: 00011 SFS TRAINING DISTRICT

EMPLOYEE IDENT.	EMPLOYEE NAME	ELMT NO	ELEMENT DESCRIPTION	EMPLOYEE-TYPE N PREVIOUS CONTENT	CURRENT CONTENT	ACTION DATE
FR7254018	SMITH,JANE	0101	MINIMUM RECORD	1		07/01/13
ZZZZ		0101	MINIMUM RECORD		1	
		0102	NAME		SMITH,JANE	
		0107	EMPLOYMT STATUS		A	
		0108	STATUS DATE		08/16/13	
		0111	EMPLOYEE TYPE		N	
		0115	PAY CYCLE 1		E4	
		0124	LAST PERS ACT 1		01	
		0127	LST PERS ACT DT		07/01/13	
		0128	ORIG HIRE DATE		07/01/13	
		0129	PRIMARY JOB		1	
		0130	PERM INDIC		P	
		0174	SEG01-STATUS		1	
		0131	PAY LOCATION		016	
		0132	1ST PROB SERV		07/01/13	
		0133	WRK LOCATION 1		00016	
		0142	JOB STATUS 1		A	
		0205	SEX		F	
		0206	DATE OF BIRTH		03/11/49	
		0232	FIRST WORK DATE		07/01/13	
		0233	FIRST WORK FLAG		N	
		2101	WORK LOCATION		00016	
		2102	JOB CLASS		410020	
		2103	PAY BASIS		M	
		2106	FULL TIME RATE	.000	7372.000	
		2107	RATE SCHEDULE		3	
		2108	RANGE/COLUMN		350	
		2109	STEP		1	
		2110	% FULL TIME	.00	100.00	
		2111	PAY MONTHS		12	
		2112	JOB PAY CYCLE		E4	
		2113	TIME RPT CODE		T	
		2114	POSITION NUMBER		100000	
		2116	ILL PLAN		NA	
		2117	VACATION PLAN		NA	
		2120	BOARD APPROVAL		06/29/13	
		2123	JOB STATUS		A	
		2124	JOB STATUS DATE		07/01/11	
		2125	JOB PERMANENCY		P	
		2127	WORK PHONE		3104441212	
		2128	WORK PHONE EXT		400	
		2129	WORK CALENDAR		M	
		2130	WORK HOURS/DAY	.00	8.00	
		2132	ANNIVERSARY DT		01/01/14	
		2134	EVALUATION TYPE		5	

AIMS140/PP1800XX/032188 PERSONNEL/PAYROLL/RETIREMENT SYSTEM PAGE NO. 0001

RUN TIME 21:16:18 DATA BASE AUDIT SERIES RUN DATE 08/16/15
PROCESS DATE 08/16/15 h

CHANGE REGISTER

DISTRICT: 00011 SFS TRAINING DISTRICT

EMPLOYEE IDENT.	EMPLOYEE NAME	ELMT NO	ELEMENT DESCRIPTION	EMPLOYEE-TYPE N PREVIOUS CONTENT	CURRENT CONTENT	ACTION DATE
FR7254018	SMITH,JANE	2135	EVAL DUE DATE		01/01/14	07/01/11
ZZZZ		2136	BARGAIN UNIT		MG	
		2145	TIME REPT LOC		016	
		2146	EARNINGS TYPE 1		REG	
		2149	SALARY RATE	.000	7372.000	
		2150	SALARY EFF DATE		07/01/13	
		2152	RETIRE REP RATE	.000	7372.000	
		2154	WORK DAYS	.0	261.0	
		2170	RETIREMENT PLAN		P9	
		2171	RETIREMENT STAT		M	
		2172	RETIRE EFFEC DT		07/01/13	
		2174	PRIME JOB FLAG		P	
		3101	ACCT DIST 1		00011	
		3102	ACCT FUND 1		01	
		3107	ACCT FUNC 1		27000	
		3108	ACCT OBJ 1		2461	
		3109	ACCT DEPT 1		1020000	
		3110	ACCT PCT 1	.000	50.000	
		3111	ACCT DIST 2		00011	
		3112	ACCT FUND 2		01	
		3117	ACCT FUNC 2		27000	
		3118	ACCT OBJ 2		2461	
		3119	ACCT DEPT 2		1030000	
		3120	ACCT PCT 2	.000	50.000	
		0112	BENE ELIG CODE		F	
		0127	LST PERS ACT DT	07/01/11	08/16/13	
		0201	PERM/TEMP		P	
		0202	PART/FULL		F	
		0216	STREET		12 PINE STREET	
		0217	CITY		LAKEWOOD	
		0218	STATE		CA	
		0219	ZIP		91111	
		0220	HOME PHONE		2135551212	
		0221	EMRGNCY CONTACT		ED SMITH	
		0222	CONTACT RLTNSHP		HUSBAND	
		0223	EMRGNCY PHONE		2135551212	
		0225	CONTACT RLTNSHP		N	
		0231	BARG DIR IND		N	
		0260	WHITE		X	
		0301	FED TX MAR STAT		M	
		0302	FED REG ALLOW	00	02	
		0304	STATE MAR STAT		M	
		0305	STATE REG ALLOW	00	02	
		0324	SUPP TAX OPTION		A	
		0501	BENE PLAN 1		BLC	

AIMS140/PP1800XX/032188 PERSONNEL/PAYROLL/RETIREMENT SYSTEM PAGE NO. 0001

RUN TIME 21:16:18 DATA BASE AUDIT SERIES RUN DATE 08/16/15
PROCESS DATE 08/16/15 h

CHANGE REGISTER

DISTRICT: 00011 SFS TRAINING DISTRICT

EMPLOYEE IDENT.	EMPLOYEE NAME	ELMT NO	ELEMENT DESCRIPTION	EMPLOYEE-TYPE N PREVIOUS CONTENT	CURRENT CONTENT	ACTION DATE
FR7254018	SMITH,JANE	0502	BENE PLAN COVER 1		03	07/01/11
ZZZZ		0503	BENE DED AMT 1	.00	211.34	
		0504	BENE CONT AMT 1	.00	263.06	
		5901	DED ID 1		1	
		5902	DED CODE 1		241	
		5904	DED AMOUNT 1	.00	50.00	

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SECTION VII.

NEW CERTIFICATED EMPLOYEE SCREENS

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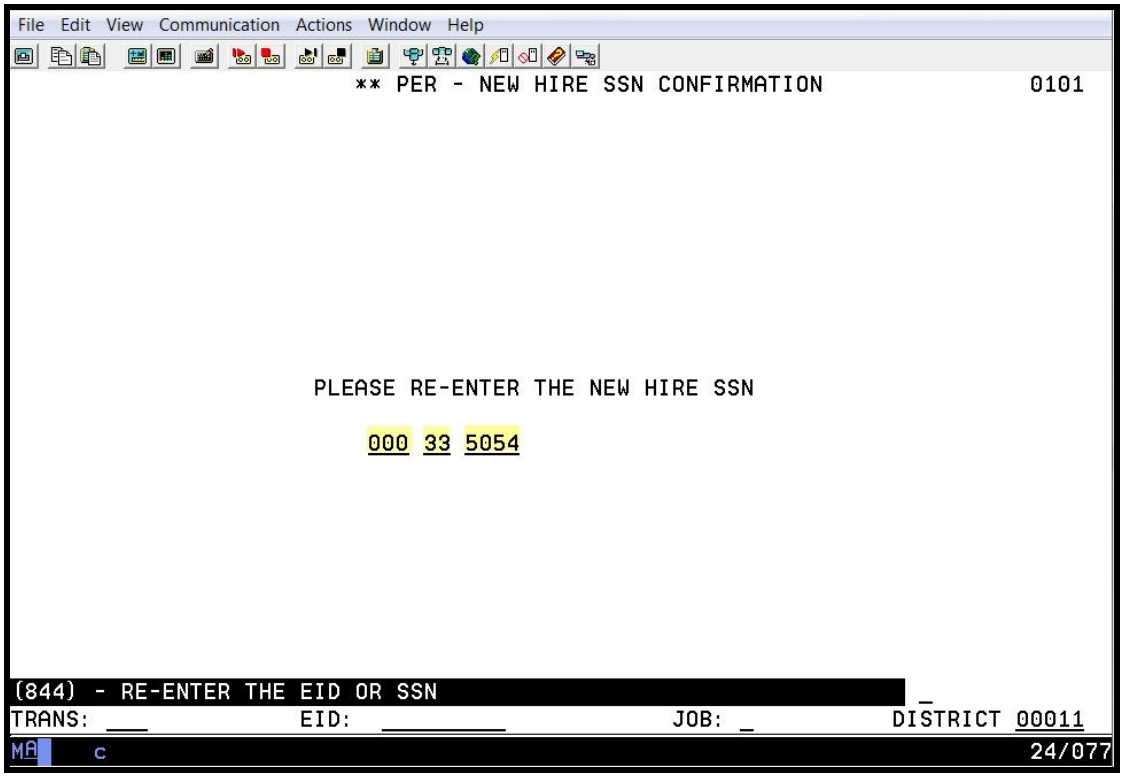
Personnel Data Entry and Update Menu (000)

```
File  Edit  View  Communication  Actions  Window  Help

                ** PER - PERSONNEL DATA ENTRY AND UPDATE - MENU **          0100
 TRANS -------- DESCRIPTION ----------    TRANS ---------- DESCRIPTION ---------
 000   PERSONNEL UPDATE MENU              019   EMPLOYMENT VERIFICATION
 001   INITIAL EMPLOYMENT                 020   STANDARD BENEFITS
 002   NEW ASSIGNMENTS                    021   ADTL. STANDARD BENEFITS
 003   PERSONNEL ACTION DATA              022   DEPENDENTS BY NAME
 004   JOB ASSIGNMENT      (104-FUTURE)   023   VOLUNTARY DEDUCTIONS
 005   SALARY/PAY RATE     (105-FUTURE)   025   DIRECT DEPOSIT
 006   LABOR DISTRIBUTION  (106-FUTURE)   027   SSN CHANGE VERIFICATION
 007   JOB HISTORY                        028   SOCIAL SECURITY NUMBER CHANGE
 008   JOB HISTORY - SUMMARY              030   PAYROLL TAX STATUS
 010   CREDENTIAL INFORMATION INQUIRY     031   LEAVE ACCOUNT BALANCES
 011   SENIORITY STATUS                   032   GARNISHMENTS
 012   CONTACT DATA                       036   RETIREMENT BALANCES
 013   CONFIDENTIAL INFORMATION           037   UNION DUES BALANCES
 014   MISC PERSONAL DATA                 038   REINSTATE ARCHIVED EMPLOYEE
 015   EDUCATION                          039   RETIREMENT PLANS
 016   EXPERIENCE AND ORGANIZATION        097   COUNTY NAME SEARCH
 017   SKILLS AND LANGUAGES               098   DIST NAME SEARCH (ACTIVE ASSIGN)
 018   LICENSES, HONORS AND COMMENTS      099   DIST NAME SEARCH (ALL ASSIGN)
                                          NAME: ______________________________
INTERRUPT: _____
(058) - WELCOME TO THE HRS ONLINE SYSTEM.                                  _
TRANS: 001          EID: 000335054          JOB: _          DISTRICT: 00011
MA    c                                NUM                              24/054
```

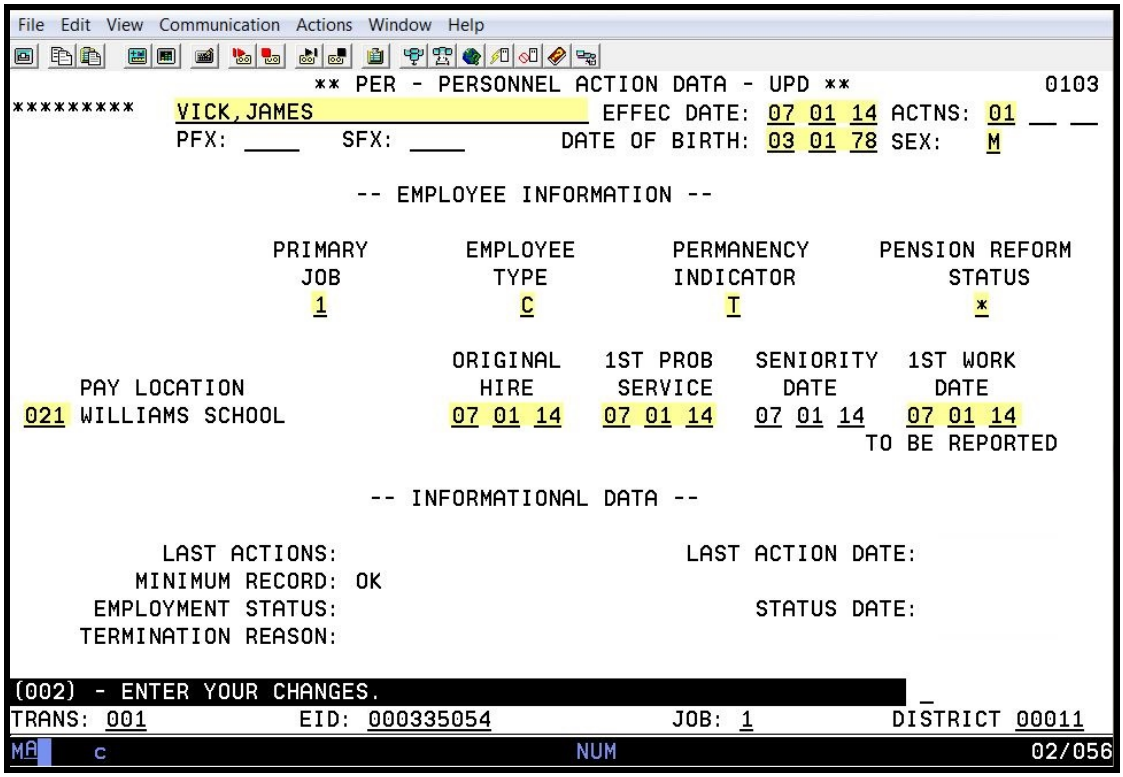
New Hire SSN Confirmation Screen (001)



If the social security number entered on the Personnel Data Entry and Update Menu (000) does not match the social security number entered on this screen, the system will generate an error message, "(846) – EID OR SSN DO NOT MATCH – NO CONFIRMATION." The system will not allow you to proceed without doing one of the following.

- If you entered the number incorrectly on this page, type the correct number, and hit the Enter key on your keyboard.
- If you entered the number incorrectly on the previous page, in the action field, type M for menu, and hit the Enter key on your keyboard. On the Personnel Entry and Update Menu, type the correct number, and hit the Enter key on your keyboard. Continue with the confirmation process.

Personnel Action Data Screen (003)



The highlighted fields are required fields.

This is an employee-level screen. Only one screen exists for each employee regardless of the number of job assignments. Please refer to your HRS System Operations Manual, beginning with Section III, Page 19, for the description of each field shown on this screen.

NOTE: The pay location code identifies the location used for warrant distribution. Warrants are sorted in alpha order within this pay location. This code is from the District Codes Table (028), code type is PL.

Job Assignment (004)

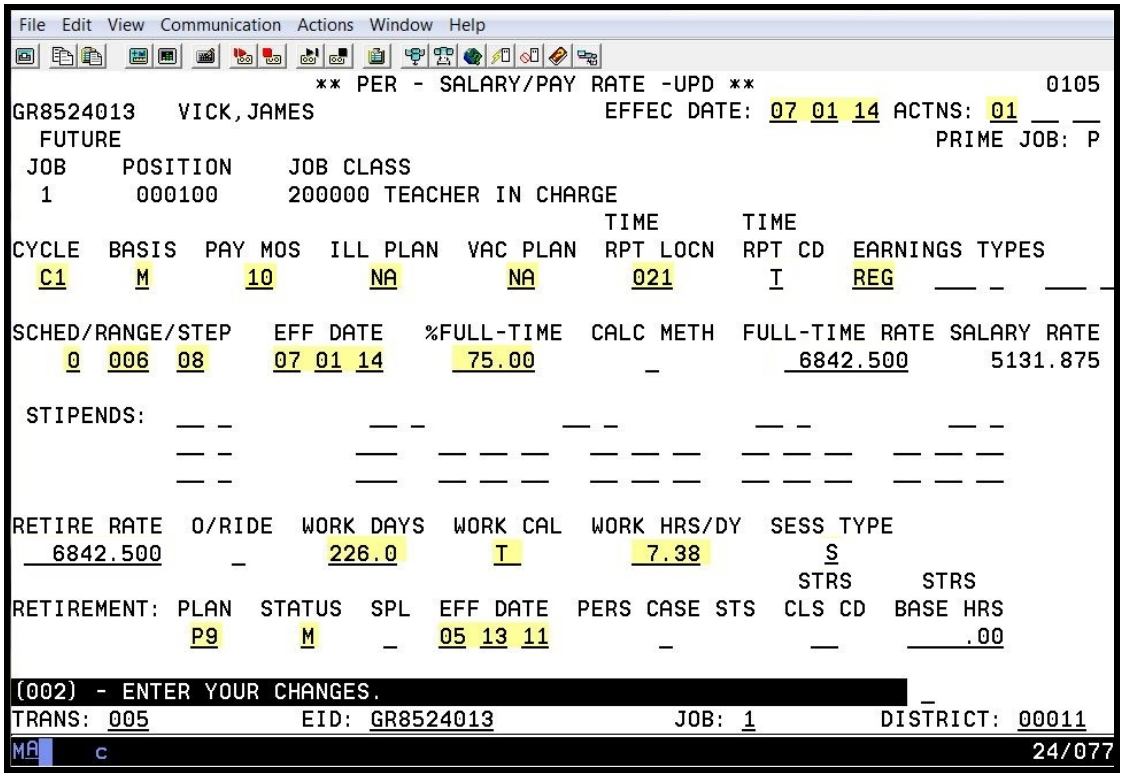
```
File  Edit  View  Communication  Actions  Window  Help

                        ** PER - JOB ASSIGNMENT - UPD **                 0104
GR8524013   VICK,JAMES                    EFFEC DATE: 07 01 14 ACTNS: 01 __ __
 FUTURE                                                        PRIME JOB: P
 JOB         POSITION   BOARD APPROVAL    CREDENTIAL   CRED EXP DATE   ACAD RANK
  1           000100       06 22 14         TC1 CL       07 01 19

 JOB CLASS  JOB TYPE  JOB STS  STATUS DATE  JOB PERMANENCY  JOB FAM  CLASS ENTRY
 200000         C        F      07 01 14      T TENURED               __ __ __
 TEACHER IN CHARGE

 WORK LOCATION                  WORK PHONE  EXT
 00021 ___                     562 922 6300 1234
 WILLIAMS SCHOOL

  ANNIV         PASS        EVAL        EVAL         BARG     UNIT     MILEAGE
   DATE       PROB DATE     TYPE      DUE DATE       UNIT    MEMBER     ELIG
 07 01 15      07 01 15       A        07 01 15       RB        Y         _

 -------------  LEAVE  ----------------- -----------  TERMINATION  ------------
 REASON             TYPE  BEGIN    END    REASON              DATE   REHIRE ELIG
 __                  _  __ __ __ __ __ __ EA END OF ASSIGNME 07 11 15     _

(002) - ENTER YOUR CHANGES.                                                  _
TRANS: 004          EID: GR8524013            JOB: 1          DISTRICT 00011
MA    c                                                                24/077
```

The highlighted fields are required fields.

This is a job-level screen. An employee may have as many as nine of these screens. This screen maintains basic job information, not including salary, retirement, or labor distribution. Please refer to your HRS System Operations Manual, beginning with Section III, Page 24, for the description of each field shown on this screen.

NOTE: The work location and subsite code is used for personnel reporting and distribution of materials. It identifies the physical location of the employee. This code is from the Work Location Table (011).

Salary/Pay Rate (005)



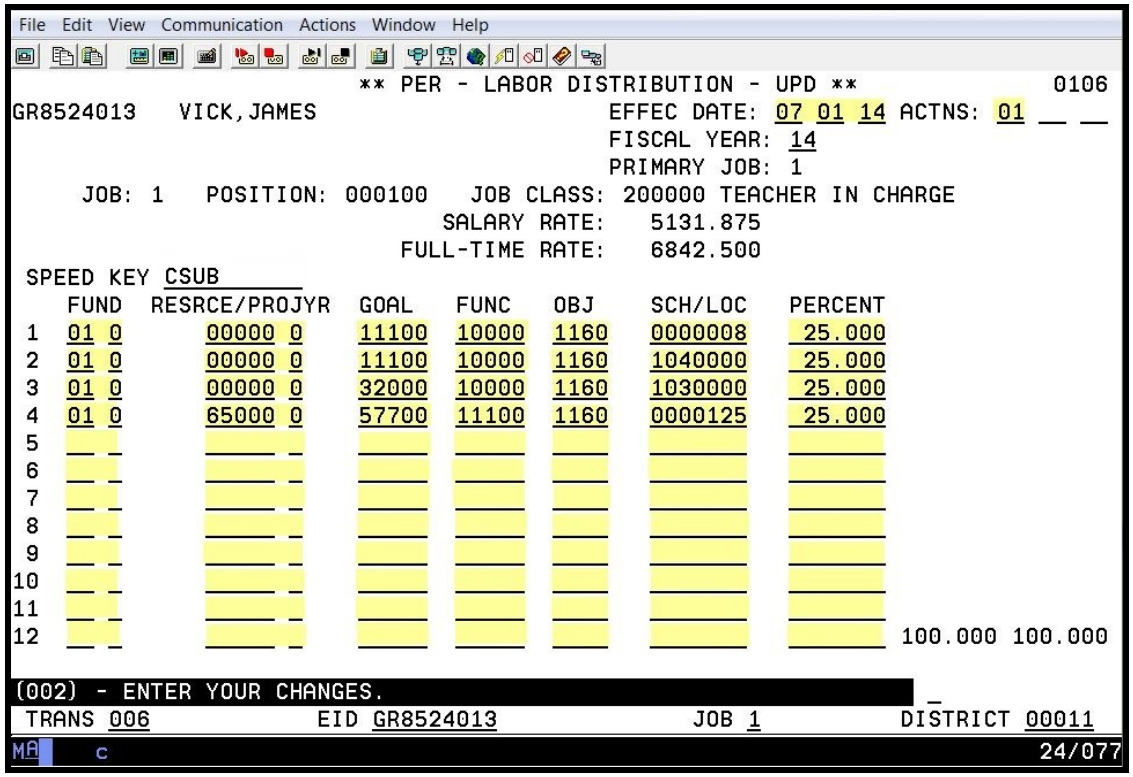
The highlighted fields are required fields.

This is a job-level screen. An employee may have as many as nine of these screens. This screen maintains the salary and retirement information for each assignment. Please refer to your HRS System Operations Manual, beginning with Section III, Page 30, for the description of each field shown on this screen.

NOTE: The time report code determines where the job is listed on the time report. If an employee has multiple job assignments, each assignment could have a different code. The time report is sorted in alpha order by name within each time report location and job type.

This code is from the District Codes Table (028), code type is PL. It defaults to the pay location code enter on the Personnel Action Data Screen (003) if no code is entered.

Labor Distribution (006)



The highlighted fields are required fields for each labor distribution line entered.

This is a job-level screen. An employee may have as many as 18 of these screens. For each job/assignment, there can be one to two screens. There can be from 1 to 24 account labor distributions with varying percentages totaling 100 percent. Please refer to your HRS Operations Manual, beginning with Section III, Page 38, for the description of each field shown on this screen.

NOTE: For Position Control districts, the system will automatically update the labor distribution information for employees assigned to the position.

Contact Data (012)

```
File  Edit  View  Communication  Actions  Window  Help
                        ** PER - CONTACT DATA - UPD **                    0112
GR8524013   VICK,JAMES                                  EMPL STATUS: *FUTURE*
            PFX: ____   SFX: ____                       PRIMARY JOB: 1

                              -- CONTACT DATA --
              CURRENT ADDRESS: 957 CHANNEL DR.
                         CITY: DOWNEY
                        STATE: CA
                     ZIP CODE: 90242 ____
                   HOME PHONE: 562 952 4562
    PHONE DIRECTORY INDICATOR: S
    COLLECTIVE BARGAINING DIRECTORY INDICATOR: N
            EMERGENCY CONTACT: SUSIE VICK
                 RELATIONSHIP: SISTER
                CONTACT PHONE: 881 546 8235  EXT: ____
                  CURRENT SSN: XXX 33 5054            CURRENT EID: GR8524013
                    PRIOR SSN:                          PRIOR EID:
        NEW NAME:   VICK,JAMES                         CALPERS ID:
     PRIOR NAMES: 1 ____________________               CALSTRS ID:
                  2 ____________________
                  3 ____________________

(002) - ENTER YOUR CHANGES.                                          _
TRANS: 012          EID: GR8524013          JOB: 1          DISTRICT 00011
MA    c                                                              24/077
```

The highlighted field is a required field.

This is an employee-level screen, only one screen per employee. Please refer to your HRS System Operations Manual, beginning with Section III, Page 44, for the description of each field shown on this screen.

Confidential Information (013)

```
File  Edit  View  Communication  Actions  Window  Help

                 ** PER - CONFIDENTIAL INFORMATION - UPD **                0113
 GR8524013  VICK,JAMES                        PRIM JOB: 1   EMPL STATUS: *FUTURE*

           SEX: M                              RACE: _ AMER INDIAN/ALASKA NATIVE
     ETHNICITY: _ YES, HISPANIC OR LATINO            _ ASIAN INDIAN
 DATE OF BIRTH: 03 01 78                             X BLACK OR AFRICAN AMERICAN
      HANDICAP: _                                    _ CAMBODIAN
                                                     _ CHINESE
                                                     _ FILIPINO
     CITIZENSHIP/VISA: __                            _ GUAMANIAN
              COUNTRY: ___                           _ HAWAIIAN
 VISA EXPIRATION DATE: __ __ __                      _ HMONG
                                                     _ JAPANESE
 MILITARY STATUS: A                                  X KOREAN
                  ACTIVE RESERVE                     _ LAOTIAN
                                                     _ OTHER ASIAN
                                                     _ OTHER PACIFIC ISLANDER
        --  EEO REPORTING CODES  --                  X SAMOAN
 PERM/TEMP FULL/PART  APPT TERM  FUND SOURCE         _ TAHITIAN
     P         F          _          _               _ VIETNAMESE
                                                     _ WHITE

(002) - ENTER YOUR CHANGES.                                          _
TRANS: 013          EID: GR8524013            JOB: 1            DISTRICT 00011
MA    c                                                                 04/017
```

The highlighted fields are required fields.

This is an employee-level screen. The date of birth and gender are automatically input on this screen from the Personnel Action Data Screen (003) and are required for retirement reporting. Please refer to your HRS System Operations Manual, beginning with Section III, Page 48, for the description of each field shown on this screen.

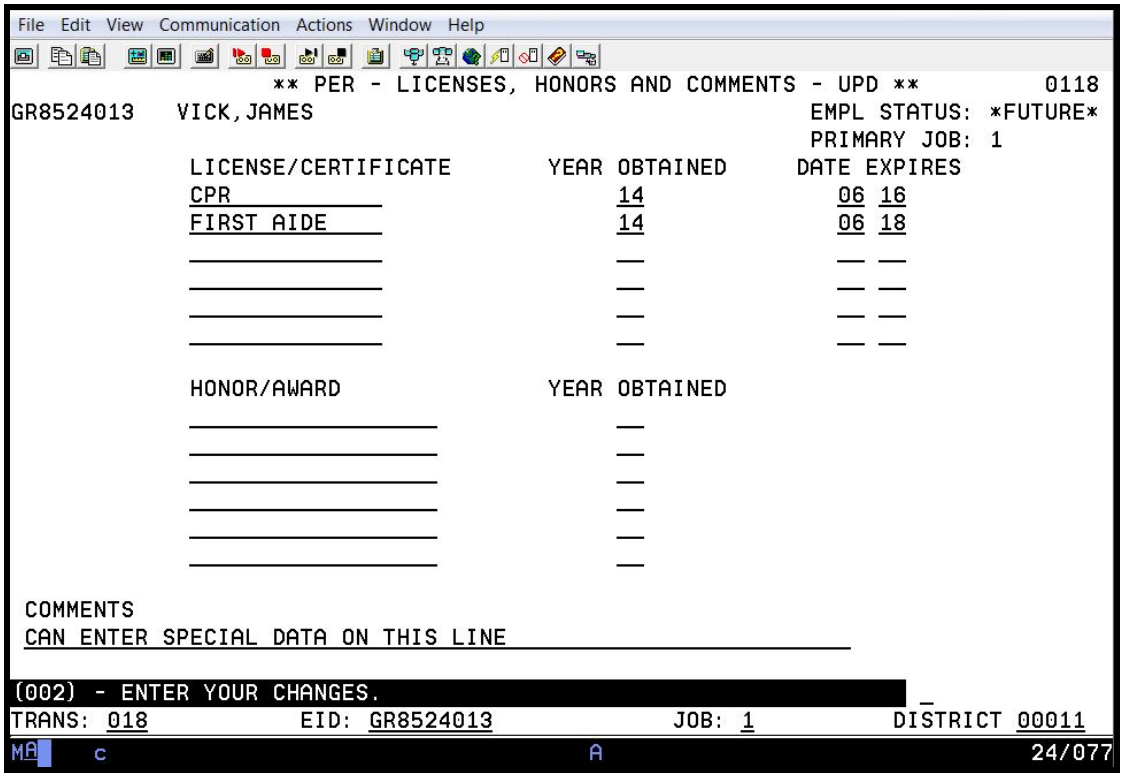
Miscellaneous Personal Data (014)

```
File  Edit  View  Communication  Actions  Window  Help
                    ** PER - MISC PERSONAL DATA - UPD **                0114
GR8524013   VICK,JAMES                                  EMPL STATUS: *FUTURE*
                                                        PRIMARY JOB: 1
                              --PERSONAL DATA--

                          TB DATE: 06 14
                PHYSICAL EXAM DATE: 05 31 14
                   EDUCATION LEVEL: __
             EDUCATION LEVEL YEAR: __
             DRIVER'S LICENSE NBR: C1111111  EXPIR DATE: 03 01 20
                                                 CLASS: C


                            --DISTRICT FIELDS--

             DISTRICT CODE 1: __          DATE 1: __ __ __
                           2: __               2: __ __ __
                           3: ______
                           4: ______
                           5: F/P 06/01/14
                           6: ____________________________

(002) - ENTER YOUR CHANGES.
TRANS: 014          EID: GR8524013          JOB: 1          DISTRICT 00011
MA    c                                                              24/077
```

The highlighted fields are required fields.

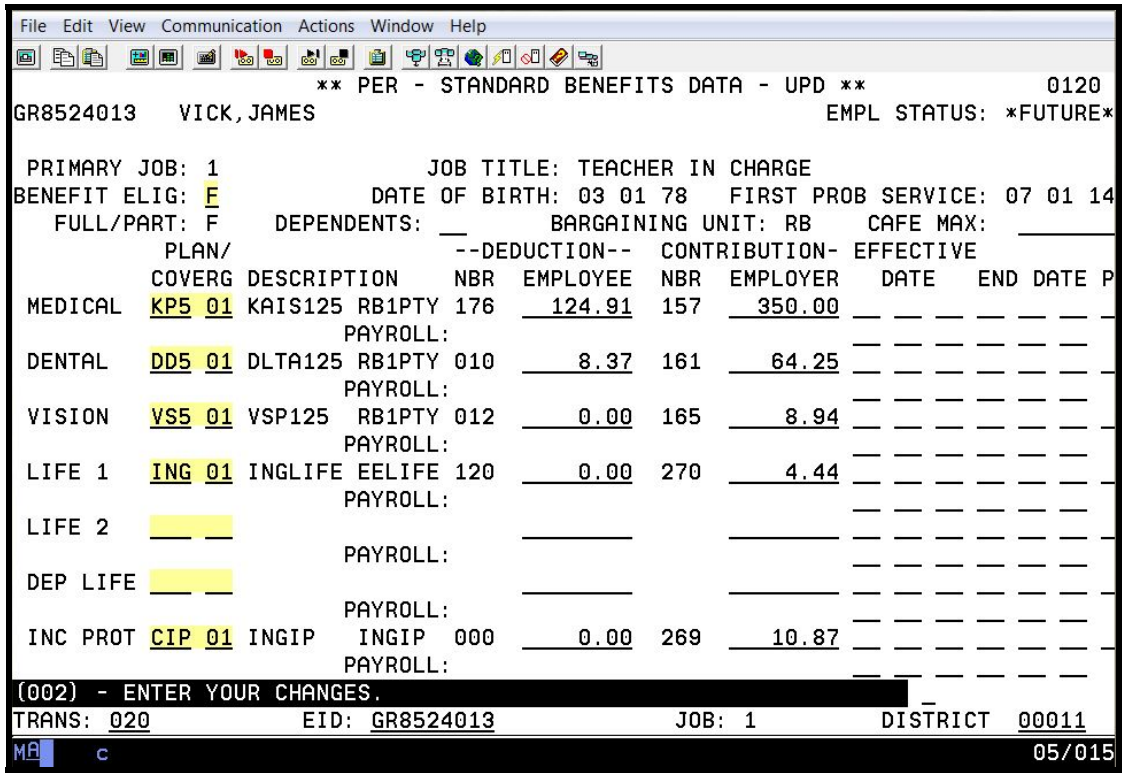
This is an employee-level screen. The tuberculosis (TB) date is the date (MM/YY) of the employee's last TB examination, the last date it was read. The system adds four years to the date entered and tracks it on the Department Notification Report (PERS111) for three months prior to the due date. Please refer to your HRS System Operations Manual, beginning with Section III, Page 73, for the description of each field shown on this screen

Licenses, Honors and Comments (018)



This is an employee-level screen. This screen allows business units to enter information about employee licenses and honors. Up to six licenses and six honors may be recorded. The screen also includes a field to enter a comment regarding the employee. Please refer to your HRS System Operations Manual, beginning with Section III, Page 83, for the description of each field shown on this screen

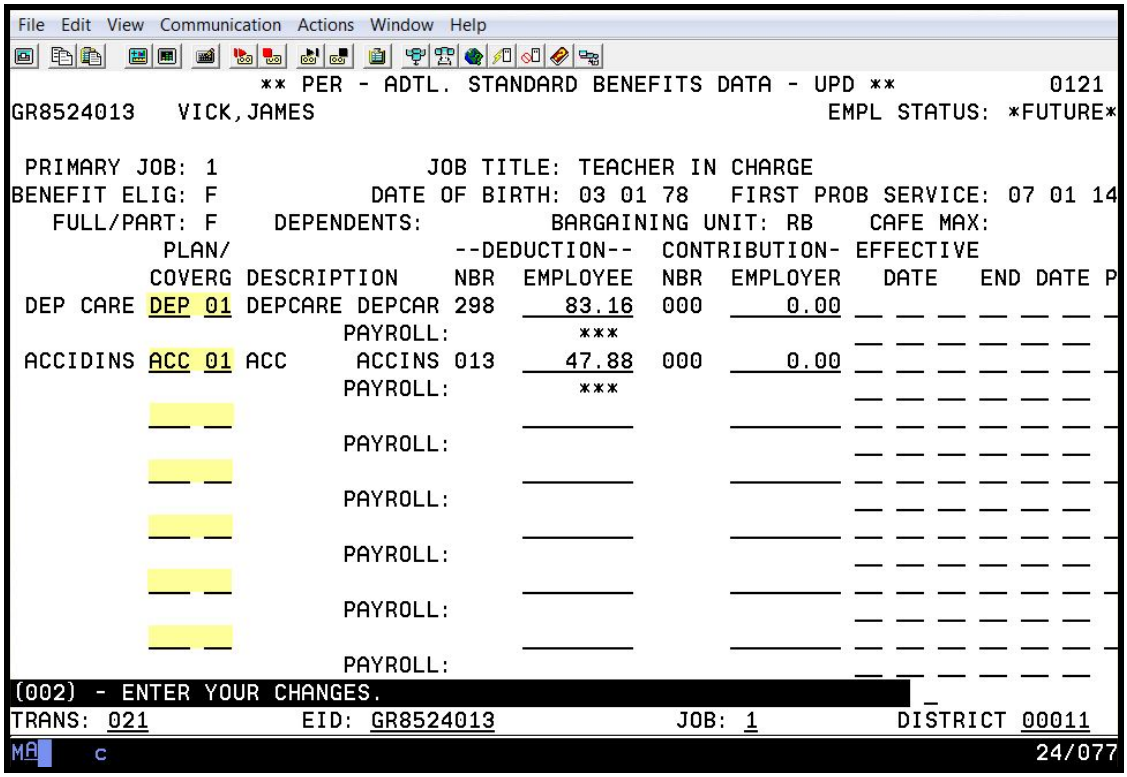
Standard Benefits Data (020)



The highlighted fields are required fields for each specified benefit being added.

This is an employee level screen, only one screen for each employee. This screen uses plan codes and level of coverage from the Benefits Table (027). Please refer to your HRS System Operations Manual, beginning with Section III, Page 54, for the description of each field shown on this screen.

Additional Standard Benefits (021)

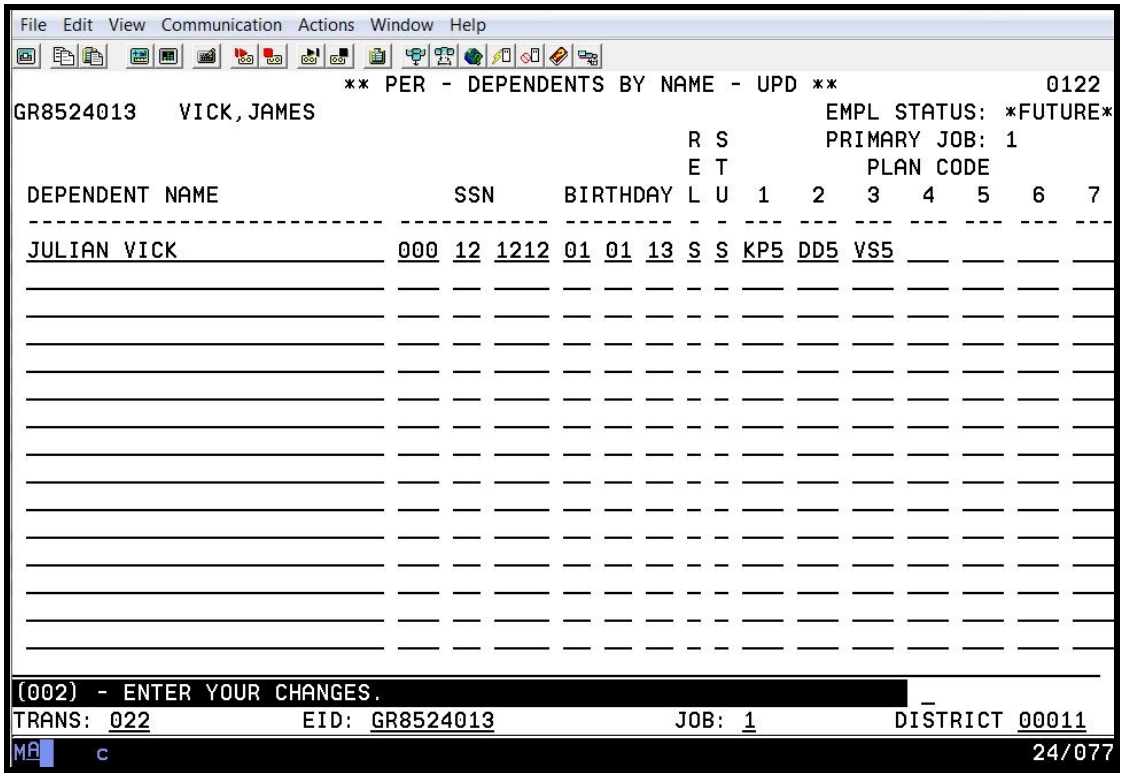


The highlighted fields are required fields for each specified additional benefit being added.

This is an employee level screen, only one screen for each employee. This screen uses plan codes and level of coverage from the Benefits Table (027).

This screen is used for benefits that cannot be entered on the Screen 020. Plans input on this screen are checked for duplication against Screen 020 and vice versa. Please refer to your HRS System Operations Manual, beginning with Section III, Page 59, for the description of each field shown on this screen.

Dependents by Name Screen (022)



```
File  Edit  View  Communication  Actions  Window  Help
                    ** PER - DEPENDENTS BY NAME - UPD **                0122
GR8524013   VICK,JAMES                                  EMPL STATUS: *FUTURE*
                                              R S       PRIMARY JOB: 1
                                              E T          PLAN CODE
 DEPENDENT NAME                 SSN     BIRTHDAY L U  1   2   3   4   5   6   7
 -------------------------- ----------- -------- - - --- --- --- --- --- --- ---
 JULIAN VICK                000 12 1212 01 01 13 S S KP5 DD5 VS5 ___ ___ ___ ___
 ___________________________ ___ __ ____ __ __ __ _ _ ___ ___ ___ ___ ___ ___ ___
 ___________________________ ___ __ ____ __ __ __ _ _ ___ ___ ___ ___ ___ ___ ___
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 ___________________________ ___ __ ____ __ __ __ _ _ ___ ___ ___ ___ ___ ___ ___
(002) - ENTER YOUR CHANGES.
TRANS: 022          EID: GR8524013          JOB: 1          DISTRICT 00011
MA    C                                                              24/077
```
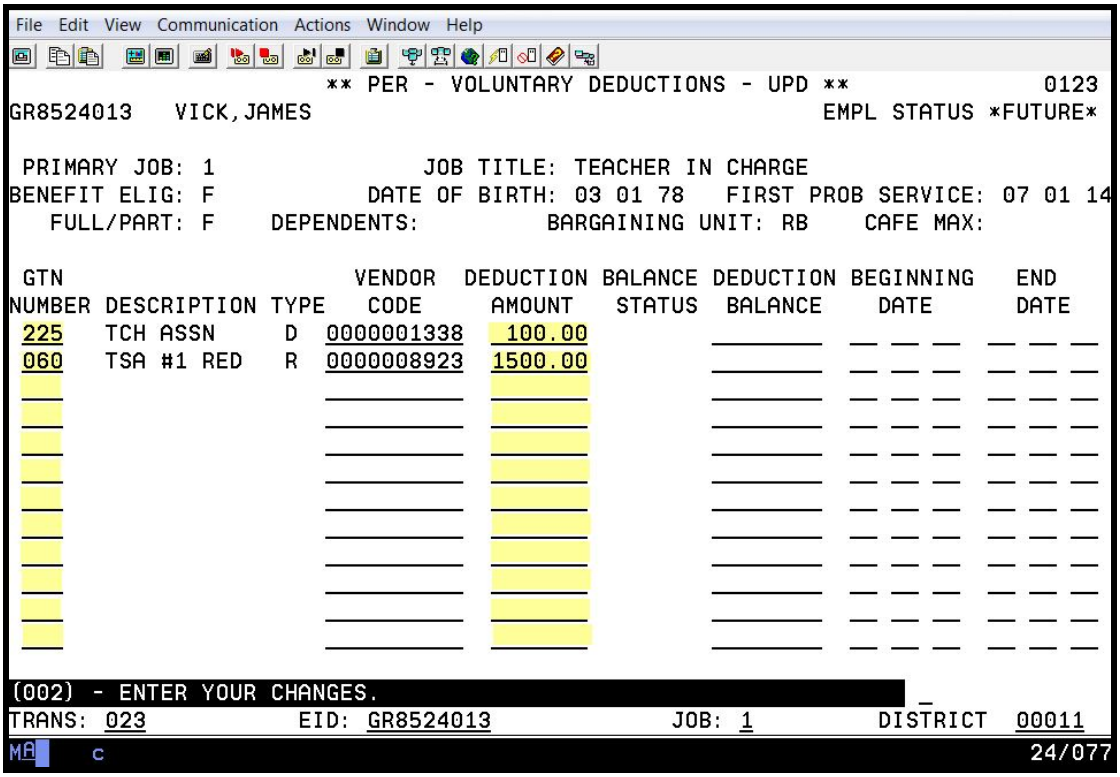

This is an employee-level screen. There is only one screen for each employee. The Dependents By Name Screen allows for entering and maintaining an employee's dependents and their related benefits data. The benefits data includes each of the dependent's benefit plans.

Voluntary Deductions (023)



The highlighted fields are required fields for each specified voluntary deduction being added.

This is an employee-level screen, only one for each employee. Twelve voluntary deductions can be input on this screen. Please refer to your HRS System Operations Manual, beginning with Section III, Page 62, for the description of each field shown on this screen.

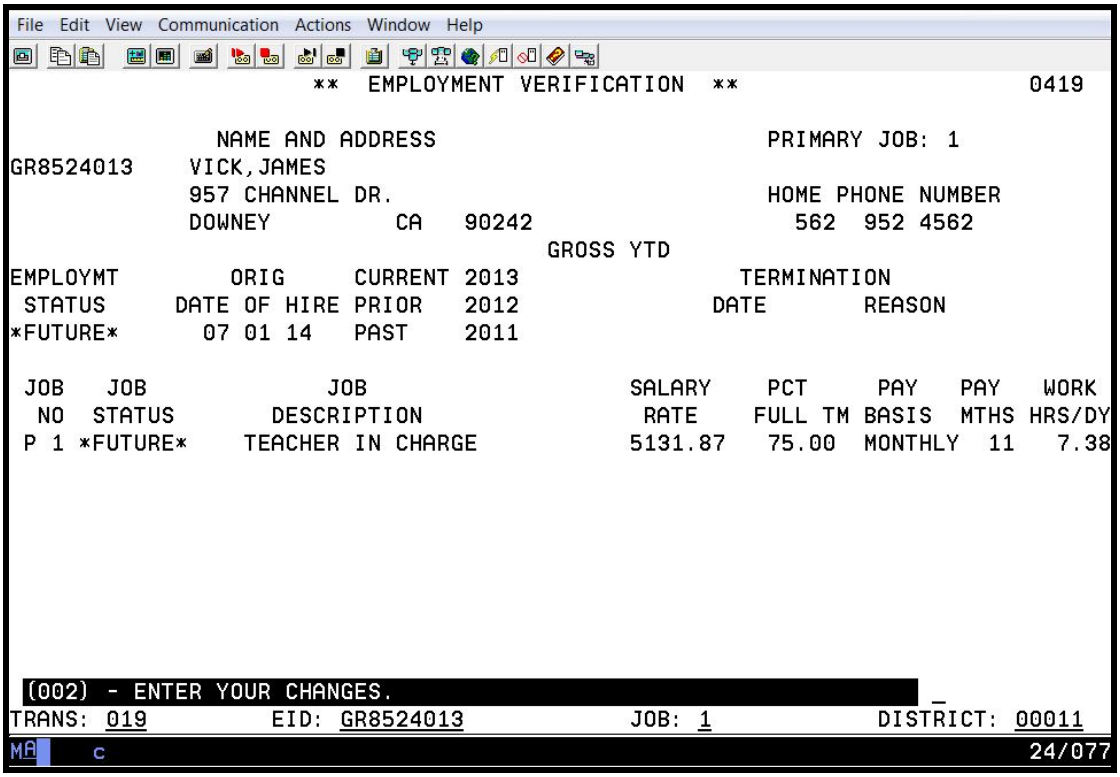
Payroll Tax Status (030)

```
File  Edit  View  Communication  Actions  Window  Help
                    ** PER - PAYROLL TAX STATUS - UPD **                0130
GR8524013   VICK,JAMES                                  EMPL STATUS: *FUTURE*


                         -- TAXING INFORMATION --

 FEDERAL: REG ALLOW:  0  TAX MARITAL STATUS: S   ADDITIONAL W/HOLDING: _______
   STATE: REG ALLOW:  0  TAX MARITAL STATUS: S   ADDITIONAL W/HOLDING: _______
                                             STATE ADDITIONAL ALLOW: __
                       SUPPLEMENTAL TAXING OPTN: _          SDI COVERAGE:  _
                                            AEIC:           SUI EXEMPTION: _
                                     REQUEST W2: _          W/C EXEMPTION: _
        PRIMARY JOB: 1
 JOB PAY CYCLES   1: C1 2:    3:    4:    5:    6:    7:    8:    9:


                         -- PAYMENT DISPOSITION --


        PAY LOCATION: 021 WILLIAMS SCHOOL


(002) - ENTER YOUR CHANGES.                                          _
TRANS: 030          EID: GR8524013            JOB: 1          DISTRICT 00011
MA    c                                                                24/077
```

The highlighted fields are required fields.

This is an employee-level screen, only one screen for each employee. Please refer to your HRS System Operations Manual, beginning with Section III, Page 68, for the description of each field shown on this screen.

Employment Verification (019)



This is an employee-level screen, only one screen for each employee. The information that is displayed assists in verifying employment information. Please refer to your HRS System Operations Manual, beginning with Section III, Page 236, for the description of each field shown on this screen.

District Name Search – All Assignments (099)

```
File  Edit  View  Communication  Actions  Window  Help
                    ** PER - DIST NAME SEARCH - INQ **                0498
NAME KEY:  VICK,JAMES
TRANS            NAME                 EID     POSITION      JOB TITLE    ST JOB
___ VICK,JAMES                     GR8524013  000100 TEACHER IN CHARGE    F  1
___
___
___
___
___
___
___
___
___
___
___
___
___
___
___
___
___
___
(075) - LAST SCREEN - NO MORE DATA
TRANS: 099          EID: GR8524013          JOB: 1          DISTRICT 00011
MA    c                                                              24/077
```

This screen lists all active and terminated job assignments. We suggest executing a name search, using Transaction 099, to verify the input of a new employee or a new job assignment for an existing employee.

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SECTION VIII.

HRS IBM SIGN OFF INSTRUCTIONS

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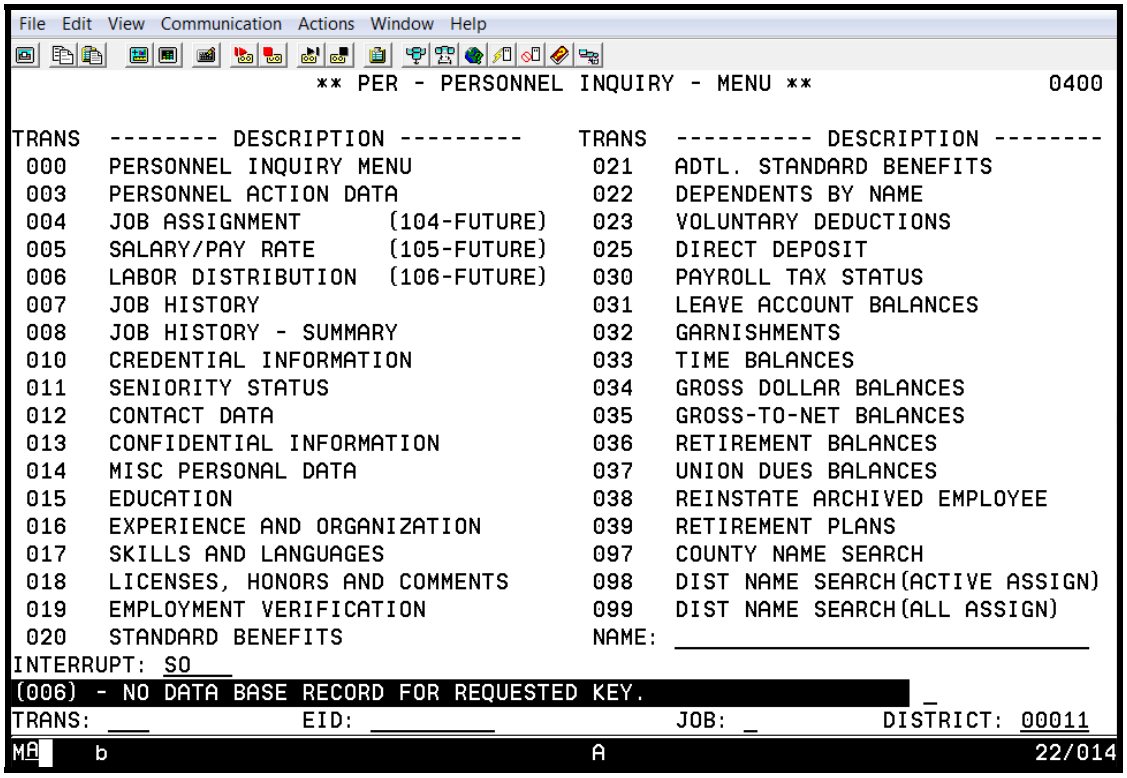
HRS-IBM Sign-off Instructions



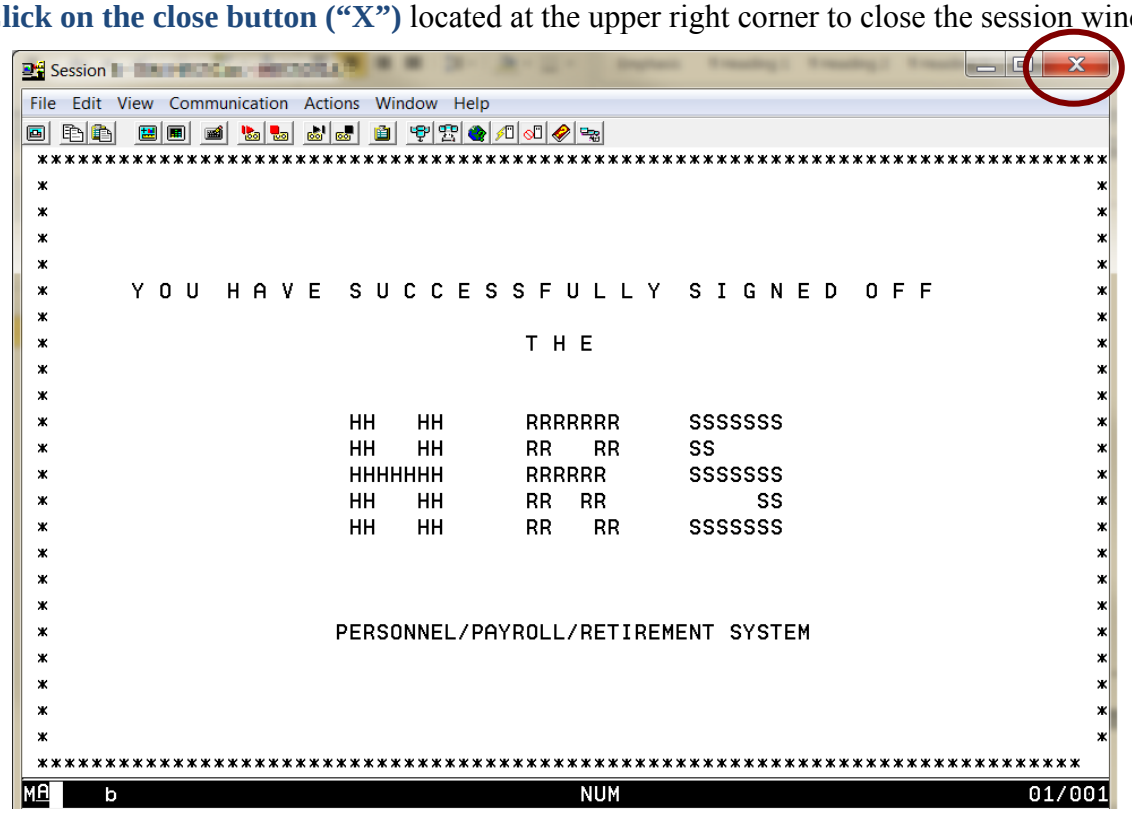
Follow these steps to successfully sign-off of HRS-IBM. This will avoid any page load time problems you might otherwise encounter if only clicking on the close button ("X") located on the upper right corner of the screen.

To sign off the system,

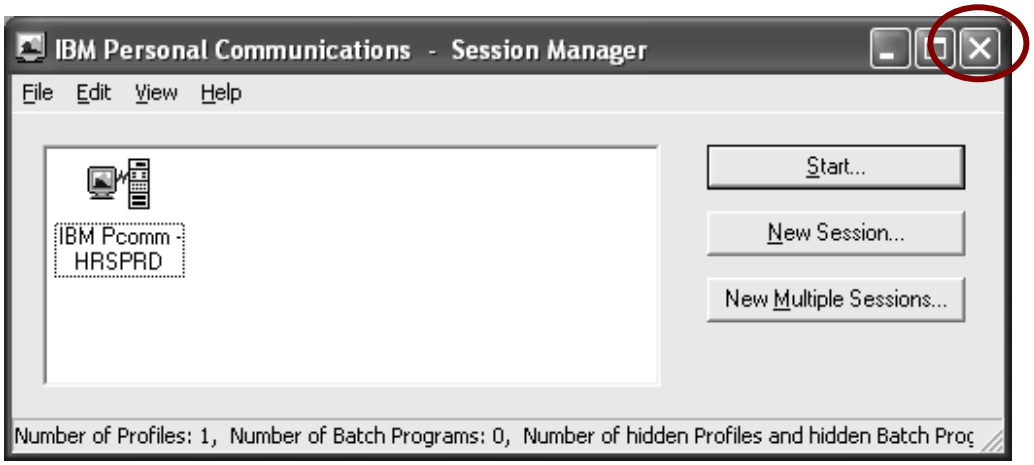
1. Navigate to the Function Menu or the Transaction Menu.
2. In the **Interrupt field**, type **SO** for sign off.
3. Hit the **Enter key** on your keyboard.

The system will display, "You have successfully signed off the HRS." This is the HRS sign-off screen.

4. **Click on the close button ("X")** located at the upper right corner to close the session window.



5. **Click on close button ("X")** located at the upper right corner to close the IBM Personal Communications - Session Manager Window.



HRS Employee Services Unit – District Support

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PERSONNEL

- Initial Employment
- Terminations/Leaves
- Job Assignment
- Salary/Pay Rate
- Labor Distribution
- Credential Information (Inquiry)
- Job History
- Future-Dated Transactions
- Seniority/Longevity
- Employment Verification
- Reinstate Archived Employee
- Misc. Personal Data
- Automated Processes
- Window For Processing

CONTROL TABLES

- Job Classification
- Work Location
- Salary Tables
- Stipend Tables
- District Codes Table (BU,TR,PL,etc.)
- Salary Mass Changes
- Account Code Speed Key
- Work Calendars
- District Profile Table

REPORT REQUEST

- Mass Retro Generation Request
- Seniority/Longevity Requests
- Employee Information Report (EIR)
- Change Register
- Control Table Reports

HRS TRAINING SESSIONS

- Session A - Introduction to Personnel
- Session B - Tables – District Maintained
- Session C - Work Calendars
- Session D - EDB Maintenance
- Session J – Position Control

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