

**HUMAN RESOURCES
PROCEDURE DESCRIPTION**

Business Info-Solution Human Resources

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JOB: AHRCLSCOM - HR Company Selection

Step 1. HR Company Selection

The Human Resources Management System maintains a comprehensive repository of information about employees and employment policies. All Human Resource policies and data are accessed from this and subsequent screens.

Note: Security. Access to Human Resources information may be restricted to specific users or user groups. Users or user groups may be restricted in viewing and/or modifying information. Users or user groups may be denied access to specific options or functions (e.g., add, update, or delete) of the Human Resources system. (See Procedure AHRCL????.)

The first step in HR Work with Employees is HR Company Selection.

➤ To access HR Company Selection,

1. On Application Cross System Main Menu, select option **3** to go to *Human Resources Main Menu*.
2. On Human Resources Main Menu, select option **1** to go to *Employee Database Maintenance Menu*.
3. On Employee Database Maintenance Menu, select option **1**, *Work with Employees*.

```

                                HR Company Selection                                AHRRG200 1
Company Id . . . . . __

Type options, press Enter.
 1=Employees      5=Display      7=Benefit Groups      8=Leave Trns

Opt Id  Name                                     Federal Tax Id
- 01 P.S.A. FINANCIAL                            73-4323111
- 02 ARAGON ENTERPRISES                          73-5432244
- 07 GIMLI DWARF ENTERPRISES                      73-4323111
- 10 COLE ENTERPRISES, INCORPORATED               73-4321223
- 25 P.S.A. CAFE-K.C.                             73-2323222
- 28 JENNIFER'S GALLERIA                          73-9999999

F3=Exit      F5=Refresh

Bottom
```

Figure 1. HR Company Selection.

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Function Keys

F3=Exit. Quit HR Company Selection.

F5=Refresh. Restore display.

F12=Cancel. Return to previous screen.

Options

Note: Taking an option here will restrict the user to the company of choice.

1=Employees. Work with Employees for this company.

5=Display. Display information about this company.

7=Benefit Groups. Work with HR Benefit Groups for this company.

8=Leave Trns. Work with HR Leave Transactions for this company.

Step 1.1. HR Company Selection, Company Information

This step displays selected company's address and Federal Tax Id.

Note: Company information is maintained in Payroll system. (See "JOB: APYCLWCOM - Work with Payroll Companies" in Payroll documentation for explanation and field definitions.)

➤ This screen is accessed with option **5** on HR Company Selection.

```
DSPLAY                      HR Company Selection                      AHRRG200 2
Company. . . . . 01 P.S.A. FINANCIAL

Press Enter to continue

Address . . . . . 4301 WATERWOOD PKY
City, State ZipX . . OKC                      OK  73118 1233
Federal Tax Id . . . 73-4323111

F3=Exit      F12=Cancel

Roll up/down
```

Figure 1. HR Company Selection—Company Information

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Step 2. HR Work with Benefit Groups

A Benefit Group defines a package of benefits that are offered to a class of employees. A Benefit Group code is assigned to each employee in HR Work with Employee-Current Job, thereby linking an employee to a Benefits Group. (See “HR Work with Employee-Current Job”)

Benefit Groups provide a method of declaring a group of employees as eligible or not eligible to enroll in particular benefit plans offered by the company. Benefit Groups also provide overrides to default Leave Category parameters. The assigned Benefits Group specifies the amount of leave an employee receives. Each Benefit Group also defines an Hours/Day Conversion Factor which is the number of hours worked that is equivalent to one day.

Note: System Option “AHR-DYHR” specifies whether leave is to be reported in days or hours. Default is “DAYS.” This system option determines how these screens are presented. On the Leave Parameter Category screens, the current setting of this system option is displayed on the upper right portion of the screen, directly below Leave Parameter Category number and name.

```
HR Work with Benefit Groups                                AHRRG101 1
Company. . . . . 01 P.S.A. FINANCIAL
Group Code . . . . ____
Type options, press Enter.
 2=Change   4=Delete   5=Display   7=Benefit Types
  Group
Opt Code  Description      Hrs/Day
          Conv Fctr
-         DEFAULT          8.00
-         AAAA MANAGERS    8.00
-         0001 DONOVAN'S   8.00

F3=Exit      F5=Refresh      F6=Add
Bottom
```

➤ This screen is accessed with option 7 on HR Company Selection.
Figure 1. HR Work with Benefit Groups

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Function Keys

F3=Exit. Quit HR Work with Benefit Groups.

F5=Refresh. Restore display.

F6=Add. Enter new Benefit Group.

F12=Cancel. Return to previous screen.

Options

2=Change. Update this Benefit Group—Detail.

4=Delete. Remove this Benefit Group.

5=Display. Display this Benefit Group—Detail.

7=Benefit Types. Work with HR Benefit Groups for this company.

Step 2.1. HR Work with Benefit Group—Detail

This step enters/updates list of benefits included in each Benefit Group. HR Work with Benefit Group—Detail tracks eight components comprising each Benefit Group definition and are presented on eight consecutive screens:

1. Hours/Day Conversion Factor for each Benefit Group;
2. Up to six Leave Parameter Categories for each Benefit Group; and
3. Benefit Types for each Benefit Group.

Function Keys

F3=Exit. Quit HR Work with Benefit Group—Detail.

F5=Refresh. Restore display.

F9=LookUp(+). Field sensitive LookUp window.

F12=Cancel. Return to previous screen.

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Step 2.1.1. HR Work with Benefit Group—Hours/Day Conversion Factor

- This first of eight screens is accessed with option 2 or 5, or F6 on HR Work with Benefit Groups.

```
UPDATE                               HR Work with Benefit Groups          AHRRG101 2
Company Id . . . . . 01 P.S.A. FINANCIAL
Group Code . . . . . _____
Type information, press Enter.
Description. . . . . DEFAULT_____
Hours/Day Conversion Factor:  8.00 Hours = 1 Day
F3=Exit          F5=Refresh          F12=Cancel          Roll up/down
```

Figure 2. HR Work with Benefit Group—Detail (1 of 8)

Field Definitions (Screen 1)

Note: Group Code and Hours/Day Conversion Factor may only be entered when adding a new Benefit Group. Group Code and Hours/Day Conversion Factor cannot be changed after Benefit Group has been created.

Group Code. Four character code that uniquely identifies this Benefit Group.

Note: One “default” Benefit Group may be defined with blank group code. This then becomes the “Benefit Group” for all employees not specifically assigned to another Benefit Group (i.e., employee’s Current Job Benefit Group is blank). Any parameters associated with a “blank” Benefit Group will override parameters in Leave Categories.

Description. Twenty character notation about this Benefit Group.

Hours/Day Conversion Factor. Number of hours worked that is equivalent to one day worked. The default Conversion Factor is 8.00 hours equals one day.

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Step 2.1.2. HR Work with Benefit Group—Leave Parameter Categories

Up to six Leave Parameter Categories may be defined for each Benefit Group. Each category defines a type of leave associated with this Benefit Group (e.g., vacation, medical, personal, etc.). Each category defined will override default Leave parameters. Six successive and identical Leave Parameter Category screens are presented.

Note: When making changes, ensure that you are on correct screen. The current Leave Parameter Category number and name are displayed on the upper right portion of the screen.

Note: System option “AHR-DYHR” determines whether Minimum Length of Service, Carryover, Carryover Limit, and Leave are presented in Days or Hours. The current setting of this system option is displayed on the upper right portion of the screen, directly below Leave Parameter Category number and name.

- Leave Parameter Category screens are accessed in consecutive order by pressing enter on the previous screen.

UPDATE	HR Work with Benefit Groups	AHRRG101 3
	Leave Parameters	
Company Id	01 P.S.A. FINANCIAL	Category 1 VACATION
Group Code	DEFAULT	by HOURS
Hours/Day Conversion Factor: 8.00 Hours = 1 Day		
Type information, press Enter.		
	Length of Service(yrs)	Leave Hours
Accrue This Category? . . .	Y (Y,N)	0 _____
Accrual Interval	*HIR	0 _____
Accrual Interval Code . . .	A (C,A,D,H)	0 _____
Min FTE	100 %	0 _____
Min Lgth of Srvc00 (hrs)	0 _____
Carryover00 (hrs)	0 _____
Carryover Limit00 (hrs)	0 _____
	0	0 _____
	0	0 _____
	0	0 _____
	0	0 _____
F3=Exit F5=Refresh F12=Cancel Roll up/down		

Figure 2. HR Work with Benefit Group—Leave Parameter Category (2-7 of 8)

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Field Definitions (Screens 2-7)

Accrue This Category? One character code specifying whether leave days/hours shall be accrued for this category?

Accrual Interval Code. One character code specifying *unit* of time used to express period of work required to earn next increment of paid leave. The Accrual Interval Code is used in conjunction with the Accrual Interval (below) to define the leave accrual interval for this category. Valid entries are:

- A** - Annual (e.g., Jan 1)
- C** - Calendar Days (e.g., every 90 days)
- D** - Day of the Month (e.g., the 15th of each month)
- H** - Hours Worked (e.g., every 520 hours)

Accrual Interval. Four character code specifying *length* of time (i.e., number of Accrual Interval Code units) that an employee is required to work to earn next increment of paid leave. For example, if Accrual Interval Code is "C" then Accrual Interval is number of days; "H" is number of hours. Valid values for Accrual Interval are determined by Accrual Interval Code.

- A** - Any valid Month/Day (mmdd); or "*HIR" to use employee's employment date or rehire date.
- C** - 1 to 356 (days)
- D** - 1 to 28-31 (day of month)
- H** - 1+ (hours)

Note: When **Accrual Code "H"** is selected, system retrieves number of hours worked since last accrual date from Payroll Totals file. Since only *monthly* totals are kept in Payroll Totals file, last accrual date is as of last day of month employee previously earned leave, and current accrual date is as of most recent month end. Therefore, actual span of time between accruals is not likely to equal specified accrual interval. This means employee will earn fractional leave days when "Hourly" Accrual Interval Code is selected.

Minimum FTE. Three digit number specifying percentage of time an employee must work relative to full-time employee to be eligible for leave. For example, if Minimum FTE is 75%, an employee with FTE of 62% will not earn leave.

Minimum Length of Service. Three digit number of days or seven digit two decimal number of hours since employment date or rehire date that an employee must work before beginning to accrue leave.

Carryover. Three digit number of days or seven digit two decimal number of hours of unused leave an employee may retain from one year to next. Unused days/hours are placed into Previous Balance total in Leave Totals file.

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Carryover Limit. Three digit number of days or seven digit two decimal number of hours of leave an employee may accumulate in Previous Balance total.

Length of Service/ Leave Table. The two columns on the right form a table that defines for each specified number of years service the corresponding amount of leave granted per Accrual Interval.

Length of Service (yrs). Two digit number specifying (in years) upper boundary of a range of service with lower boundary implied by previous Length of Service entry. The last entry defaults to 99.

Leave Days/Hours. Three digit number of days or seven digit two decimal number of hours of leave granted per Accrual Interval for employees with corresponding number of years service.

Example:

<u>Srvc</u>	<u>Days</u>
1	2
3	5
10	10
99	15

Employee with 0 to 1 year earns 2 leave days per accrual interval.

Employee with 1 year, 1 day to 3 years earns 5 leave days.

Employee with 3 years, 1 day to 10-years earns 10 leave days.

Employee with 10 years, 1 day to 99 years earns 15 leave days.

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Step 2.1.3. HR Work with Benefit Group—Benefit Types

- This screen is accessed with option 7 on HR Work with Benefit Groups or by pressing enter on the last Leave Parameter Categories screen.

```
UPDATE                               HR Work with Benefit Groups          AHRRG101 9
Company Id . . . . 01 P.S.A. FINANCIAL
Group Code . . . . ____
Type valid Benefit Type codes, press Enter.
      1. ____ +
      2. ____ +
      3. ____ +
      4. ____ +
      5. ____ +
      6. ____ +
      7. ____ +
      8. ____ +
      9. ____ +
     10. ____ +
F3=Exit      F5=Refresh                F12=Cancel      Roll up/down
```

Figure 2. HR Work with Benefit Group—Benefit Types (8 of 8)

Field Definitions (Screen 8)

Benefit Type. Four character code identifying a Benefit Type available to employees in this Benefit Group. Up to 10 Benefit Type Codes can be entered for each Benefit Group. Benefit Type must have been previously defined in Benefits Definition Master. (See procedure AHRCLBENM).

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Step; AHRCLLBF - List Benefits Group File

This procedure will list the benefit group definition previously entered.

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JOB: AHRCLPRMT – HR Work with Employees

Step 1. HR Work with Employees

The Human Resources Management System maintains a comprehensive repository of information about current and former employees. All Human Resources data about an employee is maintained with this procedure. This step updates information about current employees.

Note: An employee must have been entered into the Payroll system before employee can be accessed in Human Resources system.

1. When initially presented, the list will appear in Employee Id sequence. Typing an id or portion of an id in blank at top of Employee Id column will position the list at closest match to the id or portion of an id typed.
2. Typing a name or portion of a name in blank at top of Name column will reorganize list in alphabetical sequence by name and will position list at closest match to name or portion of name typed.
3. Typing a number in blank at top of Social Security Number column will reorganize list in numerical sequence by social security number and will position list at closest numerical match to number typed.

➤ This screen is accessed with option 1 on HR Company Selection.

Opt	Empl Id	Name	Soc Sec#	Dept	Clss	Occupation	Sts		
Type options, press Enter.									
1=PR Master		2=HR Master		7=Current Job		8=Job History		9=Dependents	
10=Benefits		11=Education/Training		12=Prior Employment		13=Personnel Flldr			
000-00-0000									
—	123456789	BROOKS, DEAN	123-45-6789	I	0101	H	0001		
—	234567890	FOX, MAXWELL	234-56-7890	A	0101	H	0004		
—	345678901	TIBBETTS, KARIN	345-67-8912	I	0101	S	0020		
—	456789012	BENBROOK, CHRISTOPHER M.	456-78-9123	I	0101	H	0001		
—	567890123	DUNCAN, DAVID	567-89-0123	I	0101	H	0007		
—	678901234	MANNING, MICHAEL	678-90-1234	A	0101	H	0001		
—	789012345	BISCEGLIA, JAMES	789-01-2345	I	0101	H	0001		
—	890123456	HOLLAND, DANIEL	890-12-3456	I	0101	H	0001		
—	901234567	CHICHELNISTSRI, BRIAN	901-23-4567	I	0101	H	0007		
—	012345678	MARCKEVICZ, SCOTT	012-34-5678	I	0101	H	0007		
—	987654321	KRICK, JESSICA	987-65-4321	A	0101	H	0001		
							More...		
F3=Exit		F5=Refresh							
							F24=Secure		

Figure 57. HR Work with Employees.

Function Keys

F3=Exit. Quit HR Work with Employees.

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F5=Refresh. Restore display.

F9=LookUp(+). Field sensitive LookUp window.

F12=Cancel. Return to previous screen.

F24=Secure. Displays Job Parameters.

Options:

1=PR Master. Payroll Work with Employees.

2=HR Master. HR Work with Employees—Detail.

7=Current Job. HR Work with Employee—Current Job.

8=Job History. HR Work with Employee—Job History.

9=Dependents. HR Work with Employee—Dependents.

10=Benefits. HR Work with Employee—Benefits.

11=Education/Training. HR Work with Employee—Education/Training.

12=Prior Employment. HR Work with Employee—Prior Employer History.

13=Personnel Fldr. HR Work with Employee—Personnel Folder.

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Step 1.1. HR Work with Employee, Detail

This step enters/updates employee personal, employment eligibility, emergency contact, and forwarding contact information. This information is unique to Human Resources. All fields on this screen are optional.

➤ This screen is accessed with option **2** on HR Work with Employees.

```
UPDATE                                HR Work with Employee                AHRRG202

Company Id . . . . 01 P.S.A. FINANCIAL
Employee Id. . . . 123456789   BROOKS, DEAN

Type information, press Enter.
US Citizen _ (Y/N)      Veteran. . _ (Y/N)      Disability _

I9 DOC 1:  List Code ___ Id _____  Expire Date 8/01/2008 +
I9 DOC 2:  List Code ___ Id _____  Expire Date 8/01/2009 +

                Emergency Contact                Forwarding Contact
Name . . . . . _____
Address1 . . . . _____
                2 . . . . _____
City/St/Zip. . _____ + _____
Phone-Business _____
                Home . . _____
Relationship . _____

                Roll up/down
F3=Exit      F5=Refresh      F9=LookUp(+)      F12=Cancel
```

Figure 53. HR Work with Employee—Detail.

Field Definitions

Company Id. Current selected company and company name. (reference only)

Employee Id. Currently selected employee and employee name. (reference only)

U.S. Citizen. One character code to indicate United States citizenship status.

Y = Yes, employee is a United States citizen.

N/_ = No, employee is not a United States citizen.

Veteran. One character code to indicate if employee served in armed forces.

Y = Yes, employee served in armed forces.

N/_ = No, employee did not serve in armed forces.

Disability. One character code indicating employee has personal limitation.

Note: This is a user-defined code, no editing is performed.

I-9 Doc 1,2. I-9 List Code, Document Id, and Document Expiration Date for two I-9 work validation documents.

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Note: The United States Immigration and Naturalization Service (INS) requires all employees hired after November 1987 to provide proof of eligibility for employment in the United States. The employee must provide the employer with evidence of this eligibility. This evidence is in the form of certain documents which provide: 1. identification of the person seeking employment, and 2. verification that this person is eligible to work in the United States. This evidence may be provided in a single document such as a U.S. passport, or two documents may be required to fully document the worker's eligibility e.g. driver's license and social security card.

Note: In documenting the following fields, the same definitions apply to both I-9 Doc 1 and I-9 Doc 2. If I-9 Doc 2 is entered, I-9 Doc 1 is required.

List Code. On the I-9 form are three lists of documents, which INS has designated for determining eligibility for employment. These lists are designated List A, List B, and List C. Within each list, specific documents are enumerated. The three character list code entered here consists of two parts: The document list identifier (A,B,C) and the numeric document specifier (1-12). For example, if a passport is presented by the employee, you would code "A," because a passport is the first item in List A.

Id. Fifteen character identification number from document referenced in List Code. (e.g., driver's license number)

Expiration Date. Date in format mmddyyyy when document is no longer valid.

Emergency Contact

Name. Name of the person to contact in the event of an emergency concerning the employee.

Address 1,2. Two line address of the emergency contact person.

City, State, Zip. Mailing city, state code, zip code and zip extension of emergency contact person.

Phone—Business. Phone number where emergency contact person may be reached during business hours.

Phone—Home Phone. Emergency contact's home phone number.

Relationship. Nature of association between Emergency Contact person and employee. (e.g., Spouse, Father, etc.)

Forwarding Contact

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Name. Name of person (if other than employee) to receive employee's correspondence after termination or transfer.

Address 1,2. Two line forwarding address for employee correspondence.

City, State, Zip. Forwarding city, state code, zip code and zip extension.

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Step 2. Payroll Work with Employee

Primary employee information in Human Resources comes from Payroll. This step directly accesses the employee's information in Payroll for update. (See "Step 1.1. Work with Employee, Detail" under "JOB: APYCLWEMP - Work with Employees" in Payroll documentation for complete instructions and field definitions.)

Caution: This employee information is actually stored in Payroll. Changing this employee information will affect Payroll processing.

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Procedure Description

Human Resources H2-17

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Key Entry

The Payroll Status and Personnel Status columns show those employees who are inactive or terminated. If you wish to eliminate those employees from the list, press the HELP key. At the bottom left side of the Help screen are two entry capable fields. Enter "Y" in the appropriate field to skip the designated employee status.

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Current Job

In this section information about the position currently held by the employee is recorded. You may call up this screen directly with function key 16 (F16). (Except when in Add Mode.)

When any data on this screen is changed (except Occupation or Supervisor Name), the information prior to the change is saved in the Job History Log. The Change Code and Memo fields are used to document the reason for the change and are displayed with the Job Log record. The Job History Log may be accessed with function key 21 (F21).

Occupation/Title

The current position held by the employee.

Benefit Group

The Benefit Group code refers to an entry in the Benefits Group Master file. It defines various groupings of benefits available to different classes of employees. It does not imply that the employee is participating in all of the benefits available to his or her benefit group, merely that the employee is eligible for those benefits.

The Benefit Group determines the Hours/Day Conversion Factor used for the employee. This Factor determines how many hours equal one day of work (eg., 8.00 hours = 1 day).

The Benefit Group also provides override parameters for the leave categories for this group of employees. If this function is not needed in your company, one record with a blank Benefit Group Code may be defined in the Benefits Group Master file. This will allow you to skip this field when entering an employee and it will still pass the edit test.

Primary Job class

The Job class refers to a code in the Job class record of the Payroll Work rate file. See procedure APYCLGLUP.

Full Time Equivalence

The percentage of time the employee works when compared to a Full-time employee in the same Benefit Group. For example, a full-time employee having an FTE of 100% and belonging to a Benefit Group with an Hours/Day Conversion Factor of 8.00 hours, normally works 40 hours per week. A half-time employee (20 hours per week) would have an FTE of 50%. The FTE is used primarily to track leave days. Please note that any value from 1% to 150% may be used.

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Entry into this field is only allowed when in Add Mode. Any changes after the initial entry must be performed with procedure AHRCLUFTE.

Primary Dept

Code referencing a record in the Department record in the Payroll G/L Accounts Reference file. Defines the current work location of the employee. See procedure APYCLGLUP. This is a required field.

Temporary

Defines the employee as a temporary worker or as a permanent employee. Enter "Y" for a temporary employee, "N" or blank for a permanent employee.

Hourly/Salary

Determines if the employee's pay is based on an hourly rate or a fixed salary. Enter "H" or "S". This is a required field.

Grade/Step

Current employment level achieved by the employee. This is a user-defined code. No editing is performed.

Pay Frequency

Frequency of the payroll cycle in which the employee is paid. Valid entries are:

- W - Weekly
- B - Bi-weekly
- M - Monthly
- S - Semi-monthly
- A - Annually

Shift

Shift the employee works or shift rotation group. This is a user-defined code.

Supervisor

The name of the employee's present supervisor.

FLSA Status

Defines the employee as Exempt or Non-Exempt under the Fair Labor Standards Act.

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Hire Date

Month, Day, and Year employment with the company began.

Position Start

Month, Day, and Year the employee's current job position within the company began. At initial employment, this will be the same as the Hire Date.

Rehire Date

Month, Day, and Year the employee resumed an association with your company after leaving employment at some previous time. In most cases when the Human Resources System needs an employment date, the program will use the Rehire Date if it exists. If not, the Hire Date is used.

LOA Start Date

Month, Day, and Year when a Leave of Absence started.

LOA End Date

Month, Day, and Year when an employee returned from a Leave of Absence.

LOA Code

User defined code to indicate the type of leave taken.

Termination Date

Month, Day, and Year when employment was or will be ended. (You may enter a future date.) This field defines the employee's Personnel Status. When the Human Resources or Payroll system needs to determine if a person is currently employed, the program will use the Termination Date compared to some other appropriate date (usually System Date or Run Date) to make the decision.

Termination Code

User defined code, which indicates the reason for the termination. There must be an entry in the Termination Date before you may make an entry in this field.

Eligible for Rehire

Would this employee be considered for future employment?

NOTE: The Hire Date, Position Start Date, Rehire Date, LOA Start Date, LOA End Date, and the Termination Date must have valid temporal relationships. That is, Hire Date must occur before any other date, no

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other date can occur after the Termination Date, Rehire must be after Hire, etc.

Change Code

User defined code citing a reason for making a change to any information on this screen.

Memo

Thirty-character field used to briefly describe the reason for making a change to any information on this field.

Primary Rate

Employees current pay rate. Display only, the information cannot be changed here.

Alt Rate 1...4

Alternate work rate codes as defined in the Payroll Employee Master file, and alternate pay rates for employees who are paid at different levels for various tasks assigned to them. These are display only fields.

The Pay Rate fields are included on this screen for informational purposes only; they cannot be updated in the Human Resources system. (All data concerning pay amounts is maintained through the Payroll system.)

These fields may optionally be hidden from view for specified users. The Sub Access 1 field in the #CURJOB object of the Human Resources Security file must be set to "ALL" or "INQ" for the Pay Rate fields to be displayed. (See procedure AHRCLSECR).

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Procedure Description

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Dependents

All of an employee's dependents are entered into the database with this screen. You must enter one record for each dependent; multiple records are permitted. Direct access to this screen is with function key 17 (F17).

When you are in Update Mode, the Dependents Index screen displayed first. It lists all previously entered Dependent records for the employee. Use the Dependent Id to select the specific record you wish to modify. Use the ROLL keys to scroll through the list if there is more than one page of records.

When in Add Mode, the Dependent Data Entry screen is shown and a Dependent Id is automatically generated.

To delete an Employee Dependent record, you must call up the record in Update Mode, when the record to be deleted is displayed, enter function key 4 (F4). The Dependents Index screen will be redisplayed and a confirmation message shown in the message area at the bottom of the screen.

Dependent Name

Name of the dependent. This is a required field.

Relationship

Nature of the association of the dependent with the employee. This is a required field.

Birth date

Month, Day, and Year of the dependent's birth.

Social Security Number

SSN of the dependent.

Race

Ethnic background or racial origin of the dependent. Valid entries are:

- B = Black
- I = American Indian and Alaskan Native
- N = Other
- O = Asian/Pacific Islander
- S = Hispanic
- W = White

Sex

Gender of the dependent. Valid entries are "M" and "F". This is a required field.

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Handicap

Code indicating a handicapped dependent. This is a user defined code, no editing is performed.

Full Time Student

Is the dependent a full time student? "Y" - yes, or "N", blank - no.

Medicare Recipient

Is the dependent receiving Medicare benefits? "Y" - Yes or "N", blank - no.

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Employee Benefits

The Benefits records define the fringe benefit plans in which the employee is eligible to participate. You must enter one record for each benefit; multiple records are allowed.

The Benefit Codes that indicate which benefits the employee is enrolled in are defined in the Benefits Master file. That file has global information about the benefit (See procedure AHRCLBENM). The Employee Benefits record contains data specific to the employee. In addition to the Benefits Master file, the employee must be declared eligible to participate in the benefit in the Benefits Group file (See procedure AHRCLBFGP). The employee's Benefit Group is defined on the Current Job Screen. Direct access to this screen is with function key 18 (F18).

When you are in Update Mode, the Benefits Index screen is displayed first. It lists all previously entered Benefit records for the employee. Use the Sequence number to select the specific record you wish to modify. Use the ROLL keys to scroll through the list if there is more than one page of records.

When in Add Mode, the Benefits Data entry screen is shown and a sequence number is automatically generated.

To delete an Employee Benefit record, you must call up the record in Update Mode, when the record to be deleted is displayed, enter function key 4 (F4). The Benefits Index screen will be redisplayed and a confirmation message is shown in the message area at the bottom of the screen.

Dependent Id

You may wish to enter benefits enrollment separately for the employee's dependents. This field allows you to do that by specifying the Dependent number of the dependent who is enrolled in the benefit. The Dependent number is the Id assigned to each of the employee's dependents when they were entered in the Dependents record of the Human Resources Database. (See previous section: Dependents Record.)

If the benefit being entered is for the employee or you do not need to enter dependents separately, use "000" as the Dependent Id. After the record as been added, this field cannot be changed. This is a required field.

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Benefit Type

Code referencing an entry in the Benefits Master file that defines the benefit you is adding. If the Benefit Type cannot be found in the Benefits Master file, an error message will be shown in the message area at the bottom of the screen. After the record has been added, this field cannot be changed. Only one record per Benefit Type is allowed. This is a required field.

Benefit Code

The Benefit code is a sub-division of the Benefit Type; it is also defined in the Benefits Master file. The Benefit Code provides a further definition of the benefit. For example, you might have a Benefit Type for health insurance defined in the Benefits Master file, then multiple Benefit Codes beneath it for various insurance carriers. When the employee is enrolled in health insurance, his insurance must be assigned to one of the insurance companies. This is a required field.

Eligibility Date

Month and Year that the employee became eligible to participate in the benefit; this is not necessarily the time when the employee actually started receiving the benefit. A program can be set up to determine when employees meet eligibility requirements and then automatically create Employee Benefits records. See procedure AHRCLELIG.

Enrollment Date

Month, Day, and Year that the employee began participation in the benefit. Premium payment usually starts on this date (if applicable).

Withdrawal Date

Month, Day, and Year that the employee ceased participation in the benefit.

Withdrawal Code

User defined code to indicate the reason for the withdrawal.

Refusal Date

Month, Day, and Year that the employer received notification that the employee declined a benefit offered.

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Education/Training

This section is used to record the employee's education and training background. This also may be used to keep records on seminars, in house or on the job training.

Direct access to this screen is with function key 19 (F19).

When you are in Update Mode, the Education/Training Index screen is displayed first. It lists all previously entered Education/Training records for the employee. Use the Education/ Training Sequence number to select the specific record you wish to modify. Use the ROLL keys to scroll through the list if there is more than one page of records.

When in Add Mode, the Education/Training Data entry screen is shown and an Education/Training Seq is automatically generated.

To delete an Employee Education/Training record, you must call up the record in Update Mode, when the record to be deleted is displayed, enter function key 4 (F4). The Education/Training Index screen will be redisplayed and a confirmation message shown in the message area at the bottom of the screen.

NOTE: While we have labeled fields on this screen to provide some structure to the information, please feel free to broadly interpret their meanings. If a field needs to take on another (Hopefully similar) meaning, set up your own coding scheme. While the heading on the screen cannot be altered, you could document your own definitions and insert them here. Also you may wish to set up a folder in the Personnel Folder section to record more detailed training information, awards, certifications, or membership in professional organizations.

Type

Type of education or training. Such as college, graduate, vocational, etc.

Level

User defined coding.

Institution Name

Name of the organization that provided the education or training.

Course of Study

Subject of training.

Start Date

Month, Day, and Year in which the course of study was begun.

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End Date

Month, Day, and Year the education was completed.

Grade

Level of achievement.

Degree

Certification issued as a result of the course of study.

Credits Required

Number of credits or length of time to earn the degree.

Credits Earned

Number of credits, which were actually earned by the employee.

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Prior Employer History

This section is used to keep information about the employee's work history. Multiple records are allowed.

Direct access to this screen is with function key 20 (F20).

When you are in Update Mode, the Employer History Index screen is displayed first. It lists all previously entered Employer History records for the employee. Use the Employer History Sequence number to select the specific record you wish to modify. Use the ROLL keys to scroll through the list if there is more than one page of records.

When in Add Mode, the Employer History Data screen is shown and an Employer History Seq is automatically generated.

To delete an Employer History record, you must call up the record in Update Mode, when the record to be deleted is displayed, enter function key 4 (F4). The Employer History Index screen will be redisplayed and a confirmation message shown in the message area at the bottom of the screen.

Company Name

Name of the company or business where the employee formerly worked.

Department

Department or location in the company where the employee formerly worked.

Position Held

Last occupation or title held by the employee while at the former employer.

Salary

Amount of pay the employee received.

Supervisor Name

Name of the employee's former boss.

Start Date

Month, Day, and Year the employee began work.

End Date

Month, Day, and Year of the employee's last day at work.

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Job History Log

Any changes to the Human Resources Current Job record or any fields in common with the Payroll system cause the contents of the record before the change to be automatically saved in the Job History Log. (Changes to the Occupation or Supervisor Name will not be logged.)

Since these records are created automatically and serve as a history of employment within your company, you should rarely need to manually add or update these records. You may want to set up Human Resources security to allow only inquiry access to this section of the database.

Direct access to this screen is with function key 21 (F21).

When you are in Update Mode, the Job Log index screen is displayed first. It lists all previously entered Job Log records for the employee. Use the Job Log Sequence no. to select the specific record you wish to modify. Use the ROLL keys to scroll through the list if there is more than one page of records.

When in Add Mode, the Job Log Data entry screen is shown and a Job Log Seq is automatically generated.

To delete a Job Log record, you must call up the record in Update Mode, when the record to be deleted is displayed, enter function key 4 (F4). The Job Log Index screen will be redisplayed and a confirmation message shown in the message area at the bottom of the screen.

Occupation/Title

The current position held by the employee.

Benefit Group

The Benefit Group code refers to an entry in the Benefits Group Master file. It defines various groups of benefits available to different classes of employees. It also defines the number of hours worked that equals one day. (See Benefit Group in Current Job above.)

Primary Job class

The Job class refers to a code in the Payroll Jobclass/Workrate file.

Full Time Equivalence

The percentage of time the employee works when compared to a Full-time employee in the same Benefit Group. For example, a full time employee

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has an FTE of 100%. A half time employee would have an FTE of 50%.
(See FTE in Current Job above.)

Primary Dept

Code referencing a record in the Payroll Company/Department file.
Defines the current work location of the employee.

Temporary

Defines the employee as a temporary worker or as a permanent employee. Enter "Y" for a temporary employee, "N", blank for a permanent employee.

Hourly/Salary

Determines if the employee's pay is based on an hourly rate or a fixed salary. Enter "H" or "S". This is a required field.

Grade/Step

Current employment level achieved by the employee. This is a user-defined code.

Pay Frequency

Frequency of the payroll cycle in which the employee is paid. Valid entries are:

- W - Weekly
- B - Bi-weekly
- M - Monthly
- S - Semi-monthly
- A - Annually

Shift

Shift the employee works or shift rotation group. This is a user-defined code.

FLSA Status

Defines the employee as Exempt or Non-Exempt under the Fair Labor Standards Act.

Hire Date

Month, Day, and Year of the beginning of employment with the company.

Position Start

Month, Day, and Year that the employee began their current job. At initial employment, this will be the same as the Hire Date.

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Rehire Date

Month, Day, and Year in which the employee resumed an association with your company after leaving employment at some previous time.

LOA Start Date

Month, Day, and Year when a Leave of Absence was started.

LOA End Date

Month, Day, and Year when an employee returned from a Leave of Absence.

LOA Code

User defined code to indicate the type of leave taken.

Termination Date

Month, Day and Year when employment was or will be ended. (You may enter a future date.)

Termination Code

User defined code, which indicates the reason for the termination. There must be an entry in the Termination Date before you may make an entry in this field.

Eligible for Rehire

Would this employee be considered for future employment?

Change Code

User defined code citing a reason for making a change to any information on this screen.

Memo

Thirty-character field used to briefly describe the reason for making a change to any information on this field.

Primary Rate

Employees current pay rate. Unlike the Current Job screen, the pay rates may be changed here.

Alt Rate 1...4

Alternate work rate codes as defined in the Payroll Jobclass/Workrate file, and alternate pay rates for employees who are paid at different levels for various tasks assigned to them.

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These fields may optionally be hidden from view for specified operators. The Sub Access 1 field in the #CURJOB object of the Human Resources Security file must be set to "ALL" or "INQ" for the Pay Rate fields to be displayed (See Procedure AHRCLSECR).

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Personnel Folder

The Personnel Folder section provides a means to record free format text information about an employee. Folder Id's must be defined in the Human Resources Security file. You may predefine an unlimited number of Personnel Folder subjects or titles, and each title may have different security access restrictions, allowing sensitive information to be viewed only by those with a legitimate need to do so. Up to 50 pages of text may be entered per title per employee.

Direct access to this screen is with function key 22 (F22).

When you are in Update Mode, the Personnel Folder Index screen is displayed first. It lists all previously entered Folder Titles. Use the Folder Id to select the specific folder you wish to modify. Use the ROLL keys to scroll through the list if there is more than one page of folders.

When in Add Mode, the Personnel Folder text entry screen is shown.

To delete a folder title, you must call up the folder in Update Mode, when the folder to be deleted is displayed, enter function key 4 (F4). The Personnel Folder screen will be redisplayed and a confirmation message shown in the message area at the bottom of the screen.

The text entry screen portion of the Personnel Folder section provides 17 lines per page of free format text entry. The ROLL keys may be used to access an additional 49 pages. The ENTER key must be pressed to save a screen before the ROLL keys are used. **FAILURE TO PRESS THE ENTER KEY WILL RESULT IN THE LOSS OF ANY CHANGES KEYED ON THE SCREEN.**

Use function key 22 (F22) to return to the Personnel Folder Index screen.

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JOB: Other Database Maintenance

Step; AHRCLTLEV - Leave Category Definition Maintenance

The default parameters that control leave accrual are maintained with this procedure. There are six user defined leave categories. Within each category are ten leave event types.

The initial screen presented displays a list of currently defined categories. Enter the Company and/or Category you wish to maintain and press the ENTER key to position the list. The following options are available for each category in the list:

- Option 1 = Define leave event types for selected leave category definition.
- Option 2 = Change/update selected leave category definition.
- Option 4 = Completely delete selected leave category definition.
- Option 5 = Display complete information for selected leave category definition.

Use function key 10 (F10) to switch to Add mode; use function key 11 (F11) for Update mode.

From the initial list screen, Function key 3 (F3) will end the job. From any other screen, Function key 3 (F3) will return you to the initial list screen.

Leave Category Definition

Six leave categories may be defined for the system.

Accrue Category

Shall leave days be accrued for this category? Yes or No.

Accrue on LOA

Shall time on Leave of Absence be included in the accrual interval? Yes or No. For example, if an employee accrued 1 day of sick leave every 30-calendar day, and that employee was on leave for 90 days, would he have 3 sick leave days or 0?

Description

Ten character category title. The first character of this title is used to indicate a day of leave on the Employee Inquiry Leave Calendar screen, therefore, each initial should be unique.

Accrual Code

Used in conjunction with the Accrual-Interval-code (below) to define the leave accrual interval for this category. The accrual interval is the length of time necessary for an employee to earn the next increment of paid

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leave. The Accrual Code determines the unit of time definition. Valid entries are:

- C - Calendar Days (e.g., every 90 days)
- H - Hours Worked (e.g., every 520 hours)
- D - Day of the Month (e.g., the 15th of each month)
- A - Annual (e.g., Jan 1)

Accrual Interval

A value associated with the Accrual Code (above) to define the accrual interval time. For example, if the Accrual Code were "C" then the Accrual Interval would specify the number of days. Valid values depend on the Accrual Code. The following table shows valid values:

<u>Accrual Code</u>	<u>Accrual Interval</u>
C	1 to 356
H	greater than or equal to 1
D	1 to 31
A	any valid Month/Day (mmdd) or "*"HIR" to use the employee's Hire or Rehire Date.

NOTE: When Accrual Code "H" is used, the system retrieves the number of hours worked since the last accrual date from the Payroll Totals file. Since only monthly totals are kept in that file, the last accrual date is as of the last day of the month the employee previously earned leave, and the current accrual date is as of the most recent month end. Therefore, the actual span of time between accruals is not likely to equal the specified accrual interval. This means that the employee will earn fractional leave days when the "Hourly" Accrual Code is used.

Rounding Factor

This is a 2 decimal place field used to define the minimum increment when fractional leave days are earned. For example, if the accrual program calculates 1.26 leave days earned and the Rounding factor is 0.25 then the employee would be given 1.50 leave days which is the next highest increment of .25 (assuming Half Adjust = N. See below). The Rounding Factor can be any value from .01 to .99.

Half Adjust

When fractional leave days are rounded based on the Rounding (above), this field determines how the Rounding Factor is applied. If this field contains "Y" (yes - half adjust) the fractional day may be changed to the next HIGHER OR LOWER Rounding Factor increment depending on if the computed value is greater than or less than half of the Rounding Factor. If this field contains "N" or blank, the fractional leave day will be only raised

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to the NEXT HIGHER Rounding Factor increment. In the previous example (in Rounding Factor definition), if Half Adjust = Y, then the employee would be given 1.25 leave days (1.26 rounded).

Minimum FTE

To be eligible for leave, an employee must have at least the Full Time Equivalence percent specified here. In other words, if Minimum FTE is 15% and an employee's FTE is 12%, that employee does not earn leave.

Minimum Length of Service

Number of days since Hire Date or Rehire Date an employee must work before they can begin to accrue leave.

Carryover Days

Number of unused days of leave an employee can retain from one year to the next. Unused days are placed into the Previous Balance total in the Leave Totals file.

Carryover Limit

Total numbers of leave days an employee can accumulate in the Previous Balance total.

Balance Forward Reset Date

Date when leave days are rolled from current balance to Previous Balance. This may be specified as a Month/Day (MMDD) or "*HIR" to use the employee's Hire or Rehire Date.

Event Definition - Up to ten events may be described per category.

Event

Code used to identify the leave event. This is the code that will be entered on the Leave Transaction to define the type of leave used.

Description

A 10-character title used to describe the Event. This is shown on the Leave Transaction Inquiry and on the Detail Absentee Report.

Paid

This field is used to indicate if this leave event is paid by your company. Enter "Y" if leave is paid, "N" or blank if it is unpaid.

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Pay Code

When leave usage is entered through Payroll Hourly/Salary transaction, this code links the four Payroll leave types (Vacation, Sick, Personal Business, Other) to a HRM Leave Event. Enter V, S, P, or O to indicate which Event code will be in the leave transaction created by Payroll.

Payroll leave types:

V - Vacation

S - Sick

P - Personal

O - Other

Step; AHRCLLCTG - List Leave Category Definitions

This procedure lists the leave categories and event types entered previously.

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Step; AHRCLBENM - Benefits Master Definition Maintenance

The Benefits Definition Maintenance procedure is where you define all of the benefit plans available to your employees. This procedure does not link a benefit to a particular employee; it only defines the benefits that are offered.

To add a benefit to the file, use function key 10 (F10) to switch to Add Mode. The data entry screen will then be displayed. To update an existing benefit, use function key 11 (F11) to switch to Update mode. A key entry screen will be presented for you to enter the Benefit Type and Benefit Code of the record to be changed. The data entry screen will then be displayed with the current benefit data shown. Enter your changes and press the ENTER key. Function key 3 (F3) will end the job.

Benefit Type

User defined code to identify and define the nature of the benefit. For example, HLTH for health insurance, SAVE for a savings plan, etc.

Benefit Code

User defined code to further define and sub divide the Benefit Type. For instance, if you offer several health insurance plans, you would assign each plan a different Benefit Code, but all would be of the Benefit Type of HLTH.

Benefit Description

Short description of the nature of the benefit.

Carrier

Name of the insurer or other company providing the benefit service.

Policy #

Group insurance policy number or other document identification code pertaining to the benefit as a whole. (As opposed to an individual employee agreement document.)

Effective Date

Month, Day, and Year that the policy agreement became effective.

Expiration Date

Month, Day, and Year that the policy agreement expires.

Payroll Deduction number

Code assigned to this benefit in the Payroll system.

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Employer Premium

Two decimal place dollar amount the employer pays per month to an insurance carrier, per employee.

Employee Premium

Two decimal place dollar amount paid in addition to the base premium amount for each additional person to be included in the benefit.

Step; AHRCLLBFM - List Benefits Master Definition File

This procedure will list the benefits definitions previously entered.

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Procedure Description

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Step; AHRCLSECR - Security File Maintenance

In addition to the security provided by the operating system, the Human Resources Management System has another level of security built in to protect the confidentiality of your employee information. Access to the Employee Database Maintenance and Inquiry programs may be restricted to authorized operators only. You may restrict only certain areas of the Employee Database or allow viewing of information without update capability.

The various areas of the Employee Database have assigned object names corresponding (usually) to the display screens on which that area is maintained in the Employee Database Maintenance program. This procedure allows you to maintain a file that lists which user id's have access to the objects and the level of that access.

The Access Level defines the type of operation a user may perform on an object. Access Level of "ALL" allows the user to view the information, change it, or add new records. Access Level "INQ" will let the user see the data but not change or add to it. A blank access level or "NONE" will keep the user from accessing the display screen at all.

The operator's user id is used to identify him to the Security file. An asterisk may be used as a wildcard when entering user id's to identify a group of users with the same security characteristics (assuming some structure to the user id's). For example, if you had four data entry clerks with user id's of DE1, DE1, DE3, and DE4, you could enter DE* in the security file to give all of them the same access capabilities. If you enter the asterisk as the first character of the user id field, that will allow all users the same access. You may also enter an asterisk as the first character of the object name to give a user access to all objects.

The Security file is used in three programs. The Employee Database Maintenance, the Employee Inquiry, and the Employee Profile List.

When a user attempts to access an area of the Employee Database controlled by the Security file, the program begins looking through the Security file from the most specific User/Object definition to the most general definition. In other words, it will first search for an exact match to the User Id and Object Name. If no match is found, it will then look for generic matches (i.e. a wildcard in the definition). This allows you to enter a blanket security level for all or a group of users, and then have specific exceptions. For instance, you can have one security record that allows operators DE* "INQUIRY" access to all objects, then have another exception record that gave operator DE1 "ALL" access to object "CURJOB".

Personnel Folders are a type of object. A user must have INQ or ALL access to see folders, just as they must to view any object. The Personnel Folder has an additional

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level of security, however. All valid Folder Id's must first be defined in the Security File before that Folder Id can be used. Also you must list users who have access to each specific folder. This gives the ability to control access to specific folders by User Id, and can help in maintaining organization of your folders by controlling folder naming.

There are two display panels used by this program. One for object Security maintenance, and one for Personnel Folder definition. Function key 1 (F1) is used to toggle between the panels. Function key F3 will end the job. The ROLL keys may be used to display a list of Objects or Folders and scroll through the list. The list may be positioned at a specific entry by entering the correct Company Id, an Action code of "S" (Search) and the User Id and Object name.

This screen is used to maintain the security clearance list for User Id's and Objects.

User And Object Maintenance

Company

Identification number of the Company for this Security list.

Action

"A" Add a record, "U" Update a record, "D" Delete a record, "S" Search for User Id/Object and display a list beginning with the record that most closely matches.

User Id

The operator's User identification code. Identifies who will be receiving access to the object. This can be the full User Id or a partial id with an asterisk as a wild card. The asterisk will cause the security lookup program to ignore all characters following when matching the security record with id of the user requesting access to the object.

Object

Code indicating the information being secured. Valid Object codes are:

#MSTKEY - Key Entry screen of the Employee Database Maintenance program and the Employee Inquiry program.

#PERS1 - Personal Data information.

#PERS2 - Emergency Contact, Forwarding address.

#CURJOB - Current Job information.

#JOBLOG - Job History information.

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- #BENFIT - Employee Benefits information.
- #DEPN - Dependents information.
- #EDUC - Education/Training information.
- #PRVEMP - Previous Employer.
- #NOTEBK - Personnel Folders.
- #LVDETL - Leave Detail Transactions.
- #LVCALN - Leave Absentee Summary.
- * - All Objects

Folder Id

Valid Folder Id as defined on the Folder Definition Screen.

Access

Level of security clearance allowed to an operator for an object. Valid Access codes are:

ALL - Operator is allowed to Add, Update, Delete, and view an object.

INQ - Operator is allowed to View an object but cannot make any changes to it.

NONE - (or blank) Operator is restricted from all access to the object.

Sub Access (1-6)

An object may contain certain data that requires further security restriction than the main object. There may be up to six Sub Access areas within an object. Valid codes are the same as Access field. The following access codes are currently defined:

<u>Object</u>	<u>Sub-Access</u>	<u>Domain</u>
#CURJOB	S/A.1	Salary Rate fields
#JOBLOG	S/A.1	Salary Rate fields

(all defined so far...room for expansion)

For example, if you want to restrict display of salary rates when operators with INQ access view the Current Job object you would enter "NONE" into

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the Sub-Access 1 field whenever you enter a security record for the #CURJOB object. The Salary rates display is controlled by Sub Access code 1 in object #CURJOB, allowing you to control clearance to salary rates separately from the remainder of the Current Job data.

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Folder Maintenance

Personnel Folder Id's must be defined in the Security file. After you enter the Folder Id and Title you must then go to the Object Security Maintenance screen to list all User Id's which have access to the folder.

Company

Identification number of the Company for this Security list.

Action

"A" Add a record, "U" Update a record, "D" Delete a record, "S" Search for the Folder Id and display a list beginning with the record that most closely matches.

Folder Id

Code to uniquely identify a folder title/subject.

Folder Title

30 character description of the folder.

JOB: Employee Listings and Reports

Step; AHRCLNQLV - Employee Inquiry

This procedure allows you to view at your workstation, a subset of the information on each employee from the Human Resources files. It operates much like the Employee Database Maintenance program, except that it does not allow any changes to be made to the employee records.

The program will display an index list of employees sequenced by Name, Employee Id, or Social Security number. For specific employees, you can request personal information, emergency contact, current job information and leave records.

Key Entry

Initially the program will display a key entry screen with entry fields to perform two different functions. The first "SELECT" line allows you to select a specific employee for subsequent operations. The second "SEARCH" line controls the index list, which is displayed on the lower portion of this screen.

To display the Employee Index, you must first enter the Company number you wish to use in the first line of the key fields. Then you may enter either an employee's name, Identification number, or Social Security number in the SEARCH fields. A list of employees is then shown on the screen, with the employee, which most nearly matches

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the request on first line of the list. The Roll keys allow scanning forward or back though the list. Each line on the list shows the employee's Id number, Social Security Number, Name, Department, Job class, Occupation, Payroll status and Personnel status. The list is show in the sequence corresponding to the search argument used: By Name, Id, or SSN. The list can also be filtered to exclude Inactive or Terminated employees. The Help screen contains two options that are used to control the filter.

To select an employee for further inquiry, enter the Employee Id number and the employee's Company number in the SELECT fields. When the ENTER key is pressed, the first employee data screen is shown. (The default first screen depends on which menu the program was initiated from.) You may indicate which screen you want to see by using the Function keys instead of the Enter key.

The Function key assignments are:

- F3 - End Job
- F13 - Key screen
- F14 - Personal data screen
- F15 - Emergency Contact screen
- F16 - Current Job screen
- F17 - Leave Calendar
- F18 - Leave Transactions
- HELP - Display Help screen, Set Index filters

These keys may be used from any screen in the program to go to another screen. Function key 13 will always return you to this Key Entry screen from any of the subsequent display screens. You must return here to enter the next Employee Id to be processed.

Access to a particular screen may be denied to certain operators. The Human Resources Security file contains a list of operators and the security access level of that operator for each screen. An operator may be assigned an access level of NONE for specific screens, which prevents that screen from being displayed to that operator.

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Personal Data

The Personal Data screen shows information about the employee, which is unrelated to the position, the employee currently holds.

Per Status

Current Personnel Status. Shows "Active" for an active employee, "Term" for an employee who has a Termination Date prior to the current date.

Pay Status

Current Payroll Status. This field shows "Active" for an active employee. "Inact" for an employee that has been changed to inactive status in the Payroll system. The primary function of the Pay Status is to control whether a payroll check can be issued to an employee. Personnel Status indicates if a person is legally employed. You may need to pay a terminated employee (e.g. payroll cycle occurs several days after an employee's last day of work), or you may not want to issue a paycheck to an active employee (e.g. on leave of absence).

Id

The Employee Id of the current employee, specified on the Key Entry screen.

SSN

Employee's Social Security number.

Name

Employee's name.

Sex

Gender of the employee (M,F).

Race

Ethnic background or race of the employee.

- B = Black
- I = American Indian and Alaskan Native
- N = Other
- O = Asian/Pacific Islander
- S = Hispanic
- W = White

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Birth date

Month, Day, Year of the employee's birth

Handicap

Code indicating a handicapped employee. This is a user-defined code.

Marital Status

Legal marital status of the employee (M,S)

Dependents

Actual number of dependents of the employee

U.S. Citizen

Code to indicate United States citizenship status. (Y-is a citizen, N- Not a citizen.)

Veteran

Code to indicate if the employee has served in the armed forces. (Y- Has served, N-Not served.)

Address

Employee's primary residence or mailing address.

City, State, Zip

Employee's home city, state code, Zip code and Zip extension.

Home Phone

Employee's home phone number

Business Phone

Phone number where the employee may be reached while at work.

Direct Deposit

Does this employee participate in the payroll direct deposit program?
(Y,N)

Bank #

Bank identification number of the bank where the employee's paycheck is to be deposited if participating in the direct deposit program.

Prenotification

Cleared prenotification edit. (Y,N,b)

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Acct. #, Type

The employee's bank account number for direct deposit. Type "C"-
Checking acct, "S"-Savings acct.

I-9 Doc 1, 2

I-9 List Code, document Id, and Document Expiration Date for two I-9
work validation documents.

List Code

Two part list code: I-9 Document List Identifier (A,B,C), and the number
Document Specifier (1-12).

On the I-9 form are three lists of documents, which INS has designated for
determining eligibility for employment. These lists are designated List A,
List B, and List C. Within each list, specific documents are enumerated.

Id

I-9 document identification number from the document referenced in the
List Code. (e.g. driver's License number.)

Expiration Date

Month, Day, Year, Century in which the i-9 document referenced expires.

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Emergency Contact

This screen shows the name of a person to contact in the event of an emergency concerning the employee. Also a forwarding address for the employee may be shown.

Emergency Contact Name

Name of the person to contact in the event of an emergency.

Relationship

Nature of the association of the Emergency Contact person with the employee. e.g. spouse, Father, etc.

Address 1,2

Address of the Emergency Contact person.

City, State, Zip

Name of the City, two character state code, Zip code and Zip extension of the mailing address of the Emergency Contact person.

Home Phone

Emergency Contact's home phone number.

Business Phone

Phone number where the Emergency contact person may be reached during business hours.

Forwarding Address Name

Name of the person to receive the employee's correspondence.

Address 1,2

Forwarding address.

City, State, Zip

Forwarding city, two character state code, Zip Code and Zip extension.

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Current Job

This screen shows information about the position currently held by the employee.

Occupation/Title

The current position held by the employee.

Benefit Group

The Benefit Group code refers to an entry in the Benefits Group Master file, defining various groupings of benefits available to different classes of employees. The Benefit Group code also defines the number of work hours that equals one work day. (To change, use procedure (AHRCLUFTE.)

Primary Job class

The Job class refers to a code in the Job class record of the Payroll Work rate file. See procedure APYCLGLUP.

Full-Time Equivalence.

The percentage of time the employee works compared to a full-time employee in the same Benefit Group. (To change, use procedure (AHRCLUFTE.)

Primary Dept

Code referencing a record in the Department record in the Payroll G/L Accounts Reference file. Defines the current work location of the employee. See procedure APYCLGLUP.

Temporary

Defines the employee as a temporary worker or as a permanent employee. (Y-Temporary, N,b-Permanent)

Hourly/Salary

Determines if the employee's pay is based on an hourly rate or a fixed salary. (H,S)

Grade/Step

Current employment level achieved by the employee. (User defined codes.)

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Pay Frequency

Frequency of the payroll cycle in which the employee is paid.

- W - Weekly
- B - Bi-weekly
- M - Monthly
- S - Semi-monthly
- A - Annually

Shift

Shift the employee works or shift rotation group. (User defined codes.)

Supervisor

The name of the employee's present supervisor.

FSLA Status

Defines the employee as Exempt or Non-Exempt under the Fair Labor Standards Act.

Hire Date

Month, Day, and Year of the beginning of the beginning of employment with the company.

Position Start

Month, Day, and Year that the employee began their current job. At initial employment, this will be the same as the Hire Date.

Rehire Date

Month, Day, and Year that the employee resumed an association with your company after leaving employment at some previous time.

LOA Start Date

Month, Day, and Year when a Leave of Absence was started.

LOA End Date

Month, Day, and Year when an employee returned from a Leave of Absence.

LOA Code

User defined code to indicate the type of leave taken.

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Termination Date

Month, Day, and Year when employment was or will be ended. This field defines the employee's Personnel Status. When the Human Resources or Payroll system needs to determine if a person is currently employed, the program will use the Termination Date to make the decision.

Termination Code

User Defined code which indicates the reason for the termination.

Eligible for Rehire

Would this employee be considered for future employment.

Primary Rate

Employee's current pay rate.

Alt Rate 1...4

Alternate work rate codes as defined in the Payroll Employee Master file, and alternate pay rates for employees who are paid at different levels for various tasks assigned to them.

The Primary Rate and Alt Rate fields may optionally be hidden from view for specified operators. The Sub Access 1 field in the #CURJOB object of the Human Resources Security file must be set to "ALL" or "INQ" for the Pay Rate fields to be displayed.

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Leave Calendar

There are three groups of information shown on the screen: The Header; the Calendar and the Leave Totals. The Header shows the Name, Id, and SSN of the current employee. The Header also contains an Input field, which allows you to enter a month and year to set the beginning date of the Calendar display.

The Calendar area consists of twelve lines, each line representing one month of the year. Across each line, the days of that month are shown. A code for each leave day used by an employee is shown in the cell corresponding to the date when the leave occurred; therefore one years worth of leave days used are represented on this screen. The code used to indicate a leave day is the initial letter of the Category Description (Vacation, Sick leave, etc) of the category of leave used on this date. In addition to the Category Description initials, another code ("S") is used as a Leave Code to indicate a scheduled leave day. If more than one leave event occurs on the same day (e.g. sick leave for a half day, and vacation for a half day), a plus sign (+) is shown next to the Leave Code.

The ROLL keys may be used to scroll the calendar back and forward; also you can enter the month and year to begin the twelve-month display.

The bottom portion of the screen shows totals of leave accrued and used by the current employee. Six lines, corresponding to each Leave Category, are shown. On each line are the following fields:

Leave Category

User specified description of the Leave Category, which was entered on the Leave Transaction. The initial letter of the Leave Category Description is used as a code to indicate a leave event in the Calendar portion of this screen.

Prv Bal

Total of unused leave days retained from previous years. These days are available for use by the employee. (See the following fields in procedure AHRCLTEV: Carryover Days, Carryover Limit, and Balance Forward Reset Date.)

Accrued

Total leave accrued since last Balance Forward Reset Date, available for use by the employee.

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Paid

Number of paid leave days used since last Balance Forward Reset Date.

Unpaid

Number of unpaid leave days used since last Balance Forward Reset Date. Leave is designated as paid or unpaid by the Leave Event Code used when Leave Transactions are entered.

Balance

Total number of leave days available for use by the employee. This is the sum of Previous Balance and Accrued, less Paid. This may be a negative number if the employee has used more leave than earned.

Lst Acrl

Date of the last accrual interval processed. Each time the Leave Accrual program determines that an employee has worked the required amount of time to earn their next increment of leave, those leave days are added to the Accrued amount, and this date is updated to reflect the date on which the requirement was met (not the date the accrual program was run).

Prv Updt

Balance Forward Reset Date. The date on which all allowed unused leave is transferred from the current Accrued total to the Previous Balance total.

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Leave Transactions

This screen shown a detail list of all Leave Transactions which have processed for the current employee.

There are three groups of information shown on the screen: The Header; the Calendar and the Leave Totals. The Header shows the Name, Id, and SSN of the current employee. The Header shows the Name, Id, and SSN of the current employee. The Header also contains an Input field, which allows you to enter a month and year to set the beginning date of the transaction list.

Each line of the detail list contains one Leave Transaction; there are twelve lines shown. The ROLL keys may be used to scroll the list back and forward; also you can enter the transaction month and year to begin the display.

The following fields are shown for each transaction (See procedure AHRCLLVTR for further explanation).

Event

Description of type of leave event.

Category

Description of the category of the leave event. Derived from the Event code.

Date

Month, Day, Year of the leave event.

Days

Number of days of leave days recorded.

Tp

Type of leave transaction. Codes used are:

- A - Accrual
- D - Accrual Date reset
- P - Balance Forward reset
- U - Leave used

Pd

Paid leave event? (Yes-Y, No-blank).

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FTE

Employee's Full Time Equivalence percentage at the time the Leave Transaction was entered.

Memo

Display of the Memo field on the Leave Transaction.

See previous section (Leave Calendar) for an explanation of the Totals Lines at the bottom of the screen.

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Step; AHRCLEMPF - Employee Profile

This report provides a comprehensive listing of information stored in the Human Resources employee database.

The report is divided into sections, which parallel the data entry screens in the Employee Database Maintenance program. Most fields on the Employee Maintenance screens are printed in this report. There are one or more pages printed per employee (page break on Employee Id).

You may select which sections are printed (Personal Data is always printed i.e. Name, Race, Sec, etc.)

The following report selection options are provided:

- Print - Address, Current Status section
- Current Job section
- Job History section
- Benefits section
- Education/Training section
- Prior Employer section
- Personnel Folder section

One specified folder or all folders might be selected.

NOTE: The Current Job section prints employee salary amounts if the operator that initiated this procedure has security clearance to view salary amounts in the Current Job section. If the operator does not have the required security clearance, the salary amounts are not printed. (See procedure AHRCLSECR.)

There are two formats of the report available: Wide format, prints a 132-column report; Narrow format uses only 80 columns. Both reports show the same data except employee salary amounts and some of the Education/Training fields.

The procedure allows employee selection by:

- Company range
- Department range
- Employee Id range
- Payroll Status (Active, Inactive, or Both)
- Personnel Status (Active, Terminated, or Both)

You may specify the sort order of the report when the report is run. There are four fields in the Employee Database that can be used for sorting. They are: Company; Employee Name; Employee Id; Department. The prompt screen allows you to enter a

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number from 1 to 3 beside each sort field. This number is then used to determine the relative position in the sort key. 1 is the highest or first sort position, 3 the lowest. For example, if you want to print a report by company, department, and employee name you would enter on the prompt screen:

Company	1
Name	3
Empl Id	_
Dept	2

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Step; AHRCLEPQY - Employee Profile/Query

This report provides a comprehensive listing of information stored in the Human Resources employee database.

The output from this procedure is the same as that produced by procedure AHRCLEMPF. The difference between the procedures is in the method of selection of the employees to be listed. This procedure uses the IBM Query facility to select and sort records for the report.

Using Query to do record selection provides enormous selection capability. With Query you use any field in the Employee Database in your report selection criteria. Query will also let you sort on any field.

The Query definition used to produce the report must be predefined. The selection criteria, however, is entered when the report is run. One Query is provided for you with the Human Resources package. You may want to create other Query definitions to meet various reporting requirements. When creating your own query you must output Company Number and Employee Id fields in a 12-character record to a file name AHRFEMPF.

You will be prompted for the Query name when you run this procedure. The package query name is shown as a default.

The report is divided into sections which parallel the data entry screens in the Employee Database Maintenance program. Most fields on the Employee Maintenance screens are printed on this report. There are one or more pages printed per employee (page break on employee).

You may select which sections are printed (Personal Data is always printed, i.e. Name, Race, Sex, etc.)

The following report selection options are provided:

Print Address, Current Status section
 Current Job section
 Job History section
 Benefits section
 Education/Training section
 Prior Employer section
 Personnel Folder section

 One specified folder or all folders might be selected.

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NOTE: The Current Job section prints employee salary amounts if the operator that initiated this procedure has security clearance to view salary amounts in the Current Job section. If the operator does not have the required security clearance, the salary amounts are not printed. (See procedure AHRCLSECR.)

There are two formats of the report available: Wide format, prints a 132-column report; Narrow format uses only 80 columns. Both reports show the same data except employee salary amounts and some of the Education/Training fields.

After you enter your responses to the first prompt screen, press the ENTER key. The Query selection screen will be displayed. It shows 6 lines with columns labeled "And/Or", "Field", "Test" and "Value". Valid field names are listed on the bottom portion of the screen. Enter the name of the field you wish to use as a selection parameter, the boolean relationship operator, and the comparison value. Up to 6 selection lines may be connected with the "And/Or" option. Press ENTER again. Query will then perform the selection and sorting, and the report print program will be executed.

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Step; AHRCLPRDR - Personnel Directory

The Personnel Directory procedure prints a list of employee names, phone numbers, addresses, and emergency contacts.

The procedure provides employee selection by Company Number range and Department Number range.

The report may be sorted by Company/Employee Name, or Company/Department/Employee Name. Page break is on either Company or Department, depending on sort option selected.

Company, Department, and Employee Name are always printed. You may also optionally include Home Phone, Business Phone, Employee Address, or Emergency Contact.

This report is formatted to fit on 8 1/2 inch wide paper (80 column).

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Step; AHRCLLOSL - Employee Length of Service List

The Length of Service list is a report that shows the length of time (in years), selected employees have worked for your company. It is printed in descending length of service order that is the employees who have worked the longest are listed first.

You are asked to enter a run month and year. The program calculates the length of service from either the Hire Date or Rehire Date, to the Run Date.

Employees are selected for the report by Company Number range and Department Number range.

The report may be sorted by Company or Department. Page break is on either Company or Department, depending on the sort option selected.

This report is formatted to fit on 8 1/2 inch wide paper (80 column).

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Step; AHRCLBRTH - Employee Birth date List

This procedure prints a list of employee birthdays. Only birth day and month are printed, we don't make you tell your age. Employees may be selected by Company Number range of Department Number range.

You can specify page breaks on Company or Department. You can sort within Company or Department, on Employee Name or Birth date. This allows you to produce either company-wide or department-wide birthday lists, and access employees by name or birthrate.

This report is formatted to fit on 8 1/2 inch paper (80 column).

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Step; AHRCLLEOC - Equal Employment Opportunity EEO-1 Report

The Equal Employment Opportunity Commission requires annual reports which show employee totals by race, sex, and job category. This procedure will compute the totals and print reports that can be used to complete the required forms.

You will be prompted for a Run Date when this procedure is executed. Terminated or Inactive employees are not included in the totals, neither are employees with future hire dates. The Run Date is used to compare to the Position Start Date and the Termination Date to determine if an employee was actually employed as of the specified Run Date. The current System Date is used as a default Run Date.

You may select the Company Id's to be included in the report and whether to combine multiple companies' totals (if more than one company is selected), or to always page break on company.

There are three types of EEO-1 reports required. The Consolidated report summarizes all selected employees into one report. The headquarters report lists totals of employees that work at your company headquarters. The Individual Establishment report contains totals by Department. You may select any or all types of reports for printing in one run. You may also specify a range of Department numbers to be included in the Individual Establishment report.

Two levels of reports may be generated. The Summary (totals) report shows only employee counts. It is the report, which is used to fill out the EEO-1 form to be submitted to the government. The Detail report provides a list of employee names that can be used to verify the Summary count.

The EEO-1 report requires totals from each of the previous year's reports (Consolidated, Headquarters, and Individual Establishment) on each subsequent annual report. The system retains the necessary totals to be printed on the next annual report. When the procedure is run, you are asked if you want to update the yearly totals. Only one year of totals is retained and when those totals are updated, the previous totals are lost. Therefore, after you choose the option to update the yearly totals, the report cannot be accurately re-run. It is recommended that you execute this procedure, not updating the totals, to verify the information produced. When you are satisfied that the report is accurate, run again to update the yearly totals. The date the totals were originally generated is displayed for reference on the right side of the Previous Year totals line. The yearly totals are updated only when the Summary report is requested. The option is ignored if only the Detail level report is selected.

The EEOC Category of an employee is determined by their Job class. The Job class record of the Payroll Jobclass/Workrate file contains a field, which defines the EEOC

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Category and Trainee Level. See procedure APYCLWRTC.

The EEO-1 Headquarters report requires that the departments which comprise the company headquarters be identified. This is done with a code in the Department record of the Payroll Company/ Department file. See procedure APYCLGLUP.

After the prompt screen has been completed, the program checks the Employee Database for errors that would affect the accuracy of the EEO-1 report, and prints a list of errors found. If problems are detected, the procedure will pause and display a message on your terminal informing you that errors have been found, and asking you whether to go ahead and finish the report or to cancel the run. At this point the error list will have been spooled to a print queue so you may examine the list before replying to the message. Since any errors listed will cause inaccuracies in the EEO-1 report it is recommended that they be corrected and the procedure re-run.

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Step; AHRCLI9LS - I-9 Report

The United States Immigration and Naturalization Service (INS) requires all employees hired after November 1987 to provide proof of eligibility for employment in the United States.

The Employee Database contains codes that indicate the types of eligibility documents presented by the employee, and the expiration date of those documents.

This procedure produces reports that list employees with missing I-9 documentation, expired I-9 documents, and those with active I-9 documents.

You are prompted for Company Number range and Department Number range. Leave the Company and Department selection fields blank to select all.

You will be asked for the type of report you want printed. Select Missing to list all employees who do not have I-9 documentation recorded. List Expiring I-9 documents will print all employees whose I-9 documents expire with a date range entered below. Employees with Active I-9 documents as of the date range may also be listed.

The Active and Expired list options must have a date range entered to define the window of time to compare to the document expiration date. For example if you wanted to produce a list of all employees whose work permit expires next month, you would request the Expiring Document option, and enter dates of the first and last day of next month. The program requires you to enter dates if the Active or Expired report is requested. You will get an error if you don't. If only the Missing report is selected, you must NOT enter dates. Dates are entered in the format of Month, Day, Year, and Century, where Century is "0" for any date in the 20th century, "1" for the 21st century.

The List Code prompt allows you to select only certain types of documents to be on the report. The List code is a two character code which combines column (A, B, C) and item number of the list of acceptable documents from the INS I-9 form. For example, a driver's license is coded as B3 and a birth certificate as C2.

You may print the employee's address on the report if needed.

The report is printed in Company, Department, Employee Id sequence. You may optionally page break by Department.

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JOB: Employee Attendance and Leave Tracking

Step; AHRCLLVTR - Enter/Update Attendance Transactions

Attendance transactions are used to record leave days used, scheduled, and accrued. Any time an employee is absent, you must enter the date, the length of time, and the reason. Employee leave may also be scheduled in advance. Attendance transactions can be used to give accrued leave to an employee. Accrued Leave totals and Previous Year totals can also be adjusted with an Attendance Transaction.

Employee absences can also be entered in the Payroll Hourly/ Salary transaction. See procedure APYCLHRS.

When the program is started, a Key Entry screen and list of Leave Transactions is presented. Enter the Company Id and Employee Id or use the Page Up/Page Down keys to position the list. The following options are available for each Benefit Group in the list:

- Option 2 = Change/update selected Leave Transaction.
- Option 4 = Completely delete selected Leave Transaction.
- Option 5 = Display complete information for selected Leave Transaction.

Use function key 10 (F10) to switch to Add mode, F11 for Update mode. When in Add mode is selected a Data Entry screen is displayed.

After attendance transactions have been entered, you must edit them, correct any errors, and then update the Employee Leave Balance files. Procedure AHRCLLVUP is used to perform the edit and update.

Company

Company Id where the employee works.

Employee Id

Identification code of the employee to whom the transaction applies.

Event Code

Type of leave event. The Event Code is defined in the Category Definition file. See procedure AHRCLTLEV.

Transaction Type

Action to be performed by the transaction. Valid entries are:

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- U - Used leave
- S - Scheduled leave
- A - Accrued leave
- D - Accrued leave adjustment
- P - Previous Year leave balance adjustment

Date

Month, Day, and Year (MMDDYY) of the beginning of the absence.

Number of Days/Hours

Length of the employee's absence in number of DAYS or HOURS depending on System Option AHR-DYHR.

NOTE: This is a 2-decimal place field. YOU MUST ENTER TWO TRAILING ZEROS WHEN ENTERING WHOLE DAYS/HOURS.

If DAYS has been selected on System Option AHR-DYHR, the Number of Days entered should not include any days the employee would not normally be required to work (e.g., weekends). When an absence spans non-work days, you should enter multiple Attendance Transactions. If HOURS has been selected on System Option AHR-DYHR, enter the actual Number of work Hours absent.

Memo

Description or explanation for the transaction. This 30-character field is shown on the Detail Attendance display of the Employee Inquiry, as well as on the Detail Absentee Report.

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Step; AHRCLLVUP - Edit Attendance Transaction/Update Leave Balance

This procedure will edit the Attendance transactions (entered with procedure AHRCLLVTR), print a list of the transactions and then update the Leave Totals file and Leave Calendar file.

You may run a proof listing that will edit and list the transaction, or final mode to update the files (if no errors are found). You may also select an errors only list in the Proof mode that will print only those transactions with errors. The Final mode always produces a list of all transactions processed.

If errors are detected, you must go back to the attendance transaction maintenance procedure (AHRCLLVTR) to correct the errors.

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Step; AHRCLAFTE - Calculate Average Full Time Equivalence

The Full Time Equivalence percent (FTE) is the factor used to calculate eligibility for Employee Benefits, such as Accrued Leave. It is the percentage time the employee normally works compared to a Full-time employee in the same Benefit Group.

For those employees who do not work a regular schedule, an average FTE must be calculated. This procedure will examine the Payroll Totals file for the previous year for all selected employees, compute their average FTE over that time period and adjust the employee's leave balances. Only hourly, active employees with more than one year of service are selected.

You will be asked to supply a Run Date when this procedure is executed. All selected employees whose employment anniversary month is equal to the Run Month will have their FTE recomputed. To have all eligible employee's FTE computed, you must run this procedure 12 times, changing the Run Date on each execution. You may also specify a Company range to process.

This procedure may be run in a Proof or Final mode. The Proof mode will produce a listing, which shows for each selected employee, their old FTE, new FTE, and all changes to leave totals for all six leave categories. The Final mode prints the same list but also updates the files.

This program uses the Payroll Totals file to find the number of hours an employee has worked during the year preceding the Run Date (entered by the operator). The default maximum hours per year is defined as 3131. This may be adjusted with system option AHR-HFTE.

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Step; AHRCLUFTE – Change/Update Full Time Equivalence/Benefit Group

The Full Time Equivalence percentage (FTE) and/or Benefit Group for an employee is entered into the employee's Current Job record of the Employee Database. Any change to either of these fields must be done with this procedure instead of the regular database maintenance program. This is because any time the FTE and/or Benefit Group changes, the employee's leave balances must also be recomputed.

When this procedure is initiated, you will be presented with a Key Entry screen. Enter the Company number and Employee Id of the employee you wish to change. The program will respond by showing employee's Name, Current FTE and Current Benefit Group. You then enter the new FTE and/or new Benefit Group in the field provided, press ENTER, and the employee will be updated and a new Key Entry screen will be displayed. Use function key F3 to end the job.

A report is produced when the job is ended, which shows the changed Employee Ids, Name, old FTE, new FTE, old Benefit Group, new Benefit Group, old Conversion Factor, new Conversion Factor and any leave total adjustments for all six leave categories.

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Step; AHRCLACRL - Leave Accrual

The Human Resources Management system can calculate the number of leave days and hours that are awarded to your employees as a part of your company's benefits policies. You must define your leave policy to the system through parameters that describe how often an employee earns leave days/hours, and how many days/hours are then awarded. This is done with procedure (AHRCLTLEV).

When this procedure is executed, you will be prompted to enter:

- Run Date
- Company range
- Categories to process
- Detail or errors only list
- Run on Jobq

The Run Date is used by the program to determine the end of the accrual interval. (The beginning of the accrual interval is the last accrual date for each employee.) This allows you to calculate leave accrual for time periods before the current date.

You may select which leave categories to process in a particular run. It will save time to select only those categories that are due for accrual. For example, if you accrue vacation only on Jan. 1st of each year, you should not select the "vacation" category on the monthly sick leave accrual cycle.

A list may be printed that shows, for each employee and each category, relevant values in the leave accrual process. The calculated accrual interval in days, the last and current accrual dates, the number of accrual intervals since the last accrual date, balance forward date and days or hours, and the number of leave days or hours accrued are printed.

Business Info-Solution Human Resources

Step; AHRCLDTAB - Employee Absentee Report

The Employee Absentee report is a list of employees by department who were absent from work during a specified time period.

The report is printed in Company, Department, and Employee Name sequence, with page breaks by department. It shows for each employee listed, the leave event, start date of the event, number of days or hours, if paid or un-paid leave was used, and the transaction memo field. Company and Department totals of days or hours of leave used per category are also printed.

You will be prompted for a company number range and a beginning and ending date.

Business Info-Solution Human Resources

Step; AHRCLLBAL - Employee Attendance Balance Report

The Employee Leave Balance report is a list of employee's leaves balances by department. It shows the number of leave days or hours used and the number of accrued days or hours remaining for each of the six leave categories.

The report is printed in Company, Department, and Employee Name sequence, with page breaks by department. Total days or hours used per Department and Company are also listed.

There is no operator selection; all employees with leave balances are listed.

Business Info-Solution Human Resources

JOB: Employee Benefits Tracking

Step; AHRCLELIG - Set Employee Benefits Eligibility

The Employee Benefit record in the Employee Database defines an employee's participation in a benefit. This procedure will automatically create Employee Benefit records for employees it determines to be eligible to enroll.

If an employee meets predefined requirements such as length of employment, job class, hours worked, etc the program will add an Employee Benefits record in the Employee Master file and set the Eligibility Date in that record. However, since there are a multitude of possible combinations of requirements for various types of benefits, you will need to modify or develop your own program to perform automatic eligibility determination. Program AHRRG020 can be used as a model on which to base your modification.

Business Info-Solution Human Resources

Step; AHRCLBEIN - Initial Eligibility List

This report lists employees whose Benefit Eligibility Date in the Employee Benefits record is within the range you specify for selected Benefit Types. All employees with an Employee Benefits record with the selected Benefit Type, with a Benefit Eligibility date within the specified range, and with a Benefit Withdrawal date that is zero or greater than the beginning selection date will be included in the list.

For selected employees, the report shows the employee's Department, Name, Birth date, Hire Date, Benefit Withdrawal Date and Withdrawal code, Eligibility Date, and annualized salary. It is printed in Employee Name sequence.

You must specify the Benefit Type for which the report is being requested, also a date range to compare with the Eligibility Date in the Employee Benefit records.

Business Info-Solution Human Resources

Step; AHRCLBEAC - Eligibility Active List

The Benefits Active List shows employees that are currently active participants in a benefit. All employees with an Employee Benefits record with the specified Benefit Type, with a Benefit Enrollment Date within the specified range and with a Benefit Withdrawal Date that is zero or greater than the beginning selection date will be included in the list.

For selected employees, the report shows the employee's Department, Name, Eligibility Date, Enrollment Date, Withdrawal Date and Code, Refusal Date and Code, and annualized salary. It is printed in Employee Name sequence.

You must specify the Benefit Type for which the report is being requested, also a date range to compare with the Enrollment Date in the Employee Benefit Records.

Business Info-Solution Human Resources

Step; AHRCLBEWD - Eligibility Withdrawal List

This report lists those employees who have withdrawn from participation in a benefit during a specified time period. All employees with an Employee Benefits record with the specified Benefit Type, and with a Withdrawal Date that is within the specified range, will be included in the list.

For selected employees, the report shows the employee's Department, Name, Enrollment Date, Eligibility Date, Withdrawal Date and Code, the Payroll Termination Date and Termination Code. It is printed in Employee Name sequence.

You must specify the Benefit Type for which the report is being requested, also a date range to compare with the Withdrawal Date in the Employee Benefit records.

Business Info-Solution Human Resources

JOB: Save And Restore Human Resource Files From Disk

Step; AHRCLHOFF - Back off Files to Magnetic Media

This procedure allows you to create a magnetic media copy of the Human Resource files (AHR). You may specify a volume id and other options. Please refer to your system documentation as to how these options will apply to you. This magnetic media may be used later to restore these files for later processing or file recovery in case of application or hardware failure. After copying to magnetic media you will be prompted to optionally **delete all of the Human Resource files just copied from disk. You would only delete these files if another copy of the Human Resource files were to be restored at a later time.

****CAUTION**** If you delete all of the Human Resource files from disk, a non-defective copy of the deleted files **MUST** be available, since **NO** recovery of the deleted files is possible after deletion.

Step; AHRCLHON - Restore Files to Disk

The magnetic media copies of Human Resource files (AHR) created by AHRCLHOFF are restored to disk for program processing. Human Resource files can only be restored to disk if they do not previously exist on the disk. No automatic deletion of current copies of the disk files is done in this procedure. See procedure AHRCLHOFF to remove the files from disk before trying to run this restoration.

Step; AHRCLFCPY - Reorganize Master Files

This procedure will check all Human Resource (AHR) file sizes and automatically drop all of the deleted records.