

# Employee Demographics and Administration

SDBOR

Part III - Training



# Training Objectives

- Understand Basics of Rule Forms Impacting Employees
- Understand Application Forms for Employees
- In Booklets, Key Board and Navigation
- \*\*If Time Allows – Refunds and Double Deductions

# Employee Data

- Manual
  - Employee Demographics
  - Employee Compensation
  - Faculty Administration
- Rules and Validation Forms

# Employee Demographic Rule & Validation Forms



# Employee Demographic Rule Forms

- Certification Code – PTRCERT
  - The Certification Code Rule Form enables the user to define a certification code, describe the associated certification, and tell the system whether it should require the certification date. The codes defined on this form are entered at the Certification Code field on the Certification Information Form (PPACERT).
- Ethnic Code – PTRETHN
  - The Ethnic Codes Rule Form enables the user to define in-house ethnic codes and link them with ethnic categories specified by the federal government for use in Equal Employment Opportunity (EEO) and IPEDS reporting.

# Employee Demographic Validation Forms

- E-mail Address Type Code – GTVEMAL
  - Use this form to define valid e-mail address type codes. Examples of e-mail address types include business and school. These codes are used on the E-mail Address Form (GOAEMAL) to enter e-mail address information for individuals.
- Name Type Code – GTVNTYP
  - Use this form to define codes for name types that can be associated with ID names. Examples of name types include maiden, nickname, and legal. These codes can be used for correspondence and reporting.
    - NULL
    - HLTH
    - STTE
    - LEGY
- System Indicator- GTVSYSI
- Zip/Postal Code – GTVZIPC
- EEO Ethnic Code – PTVEEOC
  - The EEO Ethnic Code Validation Form lists the ethnic categories specified by the U.S. federal government for use in Equal Employment Opportunity (EEO) and IPEDS reporting. The codes defined on this form are entered on the Identification Form (PPAIDEN).

# Employee Demographic Validation Forms

- Endorsement Code – PTVENDS
  - The Endorsement Code Validation Form enables the user to define endorsement codes for use in specifying certifying agencies on the Certification Information Form (PPACERT).
- Address Type Code – STVATYP
  - IN, MA and PR
- Citizen Type Code – STVCITZ
- County Code – STVCNTY
- Degree Code – STVDEGC
  - The user use this form to maintain the degree codes (Undeclared, Bachelor of Arts, Doctor of Education, etc.). This form is used by other forms to validate the degree codes.
- Degree Level Code – STVDLEV
  - The user use this form to create, update, insert, and delete degree level codes (Associate, Bachelor, Master, etc.). Other forms use this form to validate the degree level codes.

# Employee Demographic Validation Forms

- Ethnic Codes – STVETHN
- Initials Code – STVINIT
- Language Code – STVLANG
- Major/Minor/Concentration Code – STVMAJR
  - The user use this form to create, update, insert, and delete major, minor, and concentration codes (i.e., Undeclared, Journalism, Music, Law, etc.). Forms in several modules use this form to validate the major, minor, and concentration codes.
- Martial Status Code – STVMRTL
- Nation Code – STVNATN
- Port of Entry Code – STVPENT
- Relation Code – STVRELT



# Employee Demographic Validation Forms

- Source/Background Institution Code – STVSBGI
  - The user use this form to create, update, insert, and delete source/background institution codes (i.e., Harvard University, Yale University, Bryn Mawr College, etc.). Several forms in the Recruiting, Academic History, and Admissions modules use this form to validate the source/background institution codes.
- State/Province Code – STVSTAT
- Telephone Type – STVTELE
- Visa Type Code - STVVTYP

# Employee Demographic Application Forms



# Employee Demographic Application Forms

- PPAIDEN – General Person Form
- PPAGENL - General Information Form
- PPACERT – Certification Information Form
- PPAEXPR – Experience Information Form
- GOAMEDI – Medical Form – Phase II
- GOAINTL – International Form – Phase II

# General Person Record

- PPAIDEN Technical Tables
  - SPRIDEN (Person Information)
  - SPRADDR (Address)
  - SPRTELE (Telephone)
  - SPBPERS (Biographical)
  - GOREMAL (Email)
  - SPREMRG (Emergency)

# General Person Record

- PPAIDEN
  - To be an employee, must complete
    - Birth Date, First Name, Last Name, SSN/SIN/TIN, Address, and Gender.
  - Current Identification
  - Alternative Identification
  - Address
  - Telephone
  - Biographical
  - Email
  - Emergency

# General Information

- PPAGENL - Technical Tables
  - SORPCOL – Degree Source Table
  - PPREXAM - Examinations
  - PPRPUBL - Publications
  - PPRDLIC – Drivers License
  - PPRHNAW – Honors and Awards

# General Information

- PPAGENL - General Information Form
  - Captures an employee's general qualifications normally submitted by an applicant, including education, experience, examination results, and publications.
  - General Education
  - Examinations
  - Publications
  - Driver's License
  - Honors and Awards
  - Transcripts

# Certification

- PPACERT – Technical Tables
  - PPRCERT



# Certification

- Certification Information (PPACERT)
  - The Certification Information Form (PPACERT) collects data on employee certifications and endorsements. The certification codes are pulled from PTRCERT. The user can also use this form to track both formal certifications and completion of internal education programs. The Pending Action Report will list upcoming expirations of these certifications. The use of Extender may be used to scan in the document for reference.

# Experience

- PPAEXPR
  - PPREXPE

# Experience

- Person Experience Information (PPAEXPR)
  - The Person Experience Form (PPAEXPR) maintains records on an employee's past experience and references. This information will be housed in our on-line employment system. The two systems do not communicate though and may be difficult to do reporting. HR may determine to print out the appropriate information and attach with extender rather than re-populating the information in Banner.

# Medical Information Form

- GOAMEDI Technical Tables
  - SPRMEDI

# Medical Information Form

- Medical Information (GOAMEDI) – Will not use until after Go-Live (Phase Two)
  - The General Medical Information Form (GOAMEDI) enables the user to enter medical information about an applicant or employee.

# International Form

- GOAINTL Technical Tables
  - GORSEVI

# International Form

- International Information (GOAINTL)
  - The Visa International Information Form (GOAINTL) allows the user to enter visa and nationality data for citizens of countries.

# Employee Leave Rule & Validation Forms



# Employee Leave Rule & Validation Forms

- Leave Category - PTVLCAT
- Leave Category – PTRLCAT
- FMLA Status Validation Form – PTVFMST
- FMLA Leave Reason Validation Form – PTVFREA
- Leave Reason – PTRLREA
- Termination Reason – PTRTREA
- Job Change Reason – PTRJCRE

# Leave Rule/Validation Forms

- PTVLCAT
  - The Leave Category Validation Form enables you to establish leave category codes for use on the Leave Category Rules Form (PTRLCAT), and for processing Leave Reports.
- PTRLCAT
  - The Leave Category Rule Form enables the organization to define a set of leave types available to a specified group of employees.
  - Frequency of Accrual
  - Limits
  - Balance Rules
  - Roll Over Rules

# FMLA Rule/Validation Forms

- PTVFMST
  - This FMLA Status Validation Form provides the organization the ability to tie leave statuses to the employee on the FMLA Information Form (PEAFMLA).
- PTVFREA
  - The FMLA Leave Reason Form enables you to store The Family and Medical leave Act (FMLA) codes identifying reasons for taking family medical leave. The codes defined on this form are entered on the Employee FMLA Information Form (PEAFMLA).

# Reasons for Leave

- PTRLREA
  - The Leave Reason Rule Form enables the organization to define a leave reason code, describe the associated leave, specify the leave pay and benefit status, and indicate whether the leave creates COBRA eligibility. The codes defined on this form are entered on the Employee Form (PEAEMPL).
- PTRTREA
  - The Termination Reason Rule Form enables the organization to define termination codes. Each rule includes a code, a reason description, and a COBRA eligibility indicator. The codes defined on this form are entered on the Employee Information Form (PEAEMPL).
- PTRJCRE
  - The Job Change Reason Code Rule Form enables the organization to define job change reason codes for use on the Employee Jobs Form (NBAJOBS) and the Salary Planner module in Employee Self-Service.

# Leave Application Forms

- PEAEMPL – Employee Record
- PEALEAV – Employee Leave Balances
- PEAESCH - Employee Status Change Form
- PEAFMLA – Employee Family Medical Leave
- NBAJOBS – Employee Job Form

# Employee Record

- PEAEMPL – Employee Record
  - Technical Tables
  - PEBEMPL

# Employee Form

- The Employee Form (PEAEMPL) establishes information about an employee's terms of employment.
- Employee Status
- Leave Category
- Leave of Absence
- Termination

# Leave Balances Form

- Leave Balance -PEALEAV
  - Technical Tables
  - PERLEAV



# PEALEAV

- This application form displays leave balances of employees in accordance to the leave processing method selected.
- Beginning Balance
- Accrued
- PZRLEAV

# Employee Status Change Form

- Employee Status Change Form (PEAESCH)
  - Technical Tables
  - PEBEMPL

# Employee Status Change

- The Employee Status Change Form (PEAESCH) enables the organization to change an employee's status quickly and efficiently. This form is designated to terminate an employee, place an employee on extended leave, or reactivate an employee who is currently on leave.

# Family Medical Leave

- Family Medical Leave – PEAFMLA
  - Technical Tables
  - PERBFML (Begin Record)
  - PERFMLA (Leave)
  - PEREFML (Leave Balances)

# Family Medical Leave

- The Employee FMLA Information Form (PEAFMLA) enables you to enter relevant information for an employee claiming a leave under The Family and Medical Leave Act (FMLA).
- SDBOR policy is evaluate all leaves that exceed three business days. If eligible for FMLA, then PEAFMLA must be completed.
- FMLA is tracked based on BOR Policy 4:15.
- FMLA 12 month period is tracked as a period measuring forward from the eligible date of FMLA.

# Job Application Form

- NBAJOBS

- Technical Tables

- NBRBJOB – General Job Tab
    - NBRJOBS – Job Detail and Payroll Default Tab
    - NBRJOBS – Deferred Pay and Miscellaneous Tab
    - NBRXDED – Excluded Deduction Tab
    - NBREARN – Default Earnings Tab
    - NBBWKSH – Work Schedule Tab
    - NBRJLBD – Labor Distribution Tab

# NBAJOBS

## – Application

- Establishing a Job
- Setting Up Payroll
- Setting Up WTE
- Establishing Deferred Pay
- Setting Up Supervisor – Checking to match NBAPOSN
- Establishing Default Earnings
- Excluding Deductions
- Establishing Work Schedule
- Establishing Labor Distribution
- Change Reasons\*\*\*\*

# Employee Reporting Tools

- PEIADDR - Address
- PEIEHIS – Employee History
- PEIAHIS - Accommodation
- PEIJHIS – Job History
- PEILHIS – Leave History
- PEIACCR – Leave Accruals
- PEIATND – Attendance History
- PEIFMLA – FMLA History



# Faculty Rule and Validation Forms



# Faculty Rule Forms

- Faculty Type Rule Form – PTRFTYP  
– Currently Not Used
- Installation Form - PTRINST
- Tenure Rule Form - PTRTENR
- Faculty Rank Rule Form - PTRRANK
- Leave Reason Rule Form - PTRLREA

# Faculty Validation Forms

- Discipline Code Validation Form - PTVDISP
- Review Type Validation Form - PTVREVT
- Rank Validation Form - PTVRANK
- Sabbatical Type Validation Form - PTVSBTY
- Faculty Action Comment Code Validation Form - PTVFACC



# Faculty Application Forms



# Faculty Applications Forms

- Faculty Applications Forms
  - Technical Tables
  - PERBFAC – Begin Faculty
  - PERAPPT – Appointment
  - PERRANK – Rank
  - PERFAPR – Rank/Tenure Approval
  - PERSABB – Sabbatical Tracking
  - PERCAPR – Comments

# Faculty Applications Forms

- The Faculty Action Tracking Form (PEAFACT) is used to establish and maintain faculty actions such as rank review, appointment/tenure, and sabbatical or other leaves. Collects information used in regulatory reporting for reports such as IPEDS-S.
  - PEAFACT
    - Rank
    - Appointment
    - Tenure
    - Sabbatical



# Faculty Reporting Tools

– PEIFACT



# Bargaining Rule Forms





# Bargaining Rule and Validation Forms

- Bargaining Rule Forms
  - PTVBARG – Contract Type
  - PTRBURE - Relationship

# Bargaining Application Forms



# Bargaining Applications Forms

- Bargaining Applications
  - PEABARG – Establishing Unit Membership
    - HE or SC
    - Paying or Non-Paying
  - PEAGREV – Documenting Grievances
    - Phase II/III

# Bargaining Reporting Tools

- PEIEBRG – By Employee
- PEIBPRG – By Position